Business Intelligence

Early Years and Childcare

COVID-19 Business Health Check 2021

Warwickshire County Council

Working for Warwickshire

Contents

Introduction

In response to the impact of COVID-19 on early years and childcare providers operating in Warwickshire a business health check survey was undertaken with the sector in Autumn Term 2020 to identify how the pandemic had impacted to date. To assist with monitoring the ongoing impact of Covid-19 a further survey was issued in the Summer Term of 2021 with the analysis of the findings reported by way of this report.

The results and findings of the 2021 business health check will continue to be used to monitor place sufficiency, sustainability of providers and to direct and inform any support needs delivered by the LA for the sector going forwards.

With the ongoing and prolonged impact of the pandemic, it is essential that short term actions are not used as an overall solution and the LA must continue to consider a longer-term plan to monitor, support and manage the impact to the sector. This will work alongside reviewing and identifying how, if at all, the early years and childcare needs of Warwickshire families will change as the country moves towards COVID-19 impacts becoming an ongoing element that will need to be managed and considered by all contributors to the early years and childcare sector.

This business survey has been developed since the Autumn Term 2020 version to reflect feedback from the sector and has been used as a tool to touch base with providers of early years and childcare services with regards to the support that the early years and childcare team have provided over the previous year.
The LA will continue to use the information collected to inform and direct early years and childcare sufficiency assessment work which directs that of the Early Years & Childcare Entitlements, Sufficiency and Business Team.

Each section included within this summary is based on the specific questions directed to the sector in the 2021 business survey.

The focus of this survey continues in the main to be based on finance and place take up. It must be acknowledged that as the impact of the pandemic continues creating additional pressures to those from pre-pandemic times the LA must continue to monitor and not underestimate any elements.

Provision Type	**No.**	**%**
Day Nursery	146	21
Pre-school	52	8
Private Nursery School	2	0.3
School Run Provision	48	7
Maintained Nursery Classes/Schools	36	5
Nursery Units of Independent Schools	5	0.7
Childminders	331	49
Out of School Care	48	7
Holiday Schemes	12	2
Total	**680**	**100**

(Total number of providers as of 09.04.21, includes only 1 type of provision per registration number)

Summary

The returns from the sector were representational of 100% of early education funded providers and additional submissions from out of school provision, childminders and holiday schemes. Overall, the number of providers has remained stable with a small number of closures in the last year which in part were linked to pre-pandemic reasons with the closures being balanced by the opening of a similar number of new settings and childminders.

Occupancy - As with the Autumn Term survey, alongside the impact of the pandemic, the usual patterns of place take up for providers continues to be considered. Funded providers overall are reporting a return to pre- pandemic occupancy levels with many seeing increased engagement for funded 2 year old places, which is indicative of the impact of the pandemic on the economy and the recent increased marketing undertaken by the LA to promote take up of early education funded entitlement places.

Percentage of 2 year old children benefitting from funded early education (against DfE lists)

Warwickshire – Spring 2022
Statistical Neighbour View 9/11 West Midlands View 8/14
LA Ranking 74/151 National – 62%

Statistical Neighbours	2015	2016	2017	2018	2019	2020	2021	*Summer 2021	Autumn 2021*
Leicestershire	59.00	67.00	75.00	75.00	63.0	64.00	58.00	68.00	
Essex	59.00	68.00	64.00	66.00	67.00	69.00	66.00	71.00	
Warwickshire	**68.00**	**74.00**	**81.00**	**80.00**	**68.00**	**68.00**	**63.00**	**67.00**	**74.00***
Worcestershire	60.00	75.00	67.00	63.00	70.00	73.00	61.00	67.00	
Hampshire	60.00	70.00	74.00	76.00	70.00	73.00	65.00	68.00	
Warrington	83.00	94.00	100.00	107.00	71.00	75.00	77.00	75.00	
Central Bedfordshire	70.00	79.00	77.00	76.00	77.00	70.00	65.00	73.00	
Cheshire East	65.00	79.00	76.00	85.00	77.00	74.00	67.00	75.00	
Staffordshire	74.00	77.00	78.00	74.00	78.00	77.00	81.00	85.00	
North Somerset	68.00	79.00	82.00	79.00	79.00	79.00	71.00	74.00	
Cheshire West and Chester	66.00	79.00	91.00	89.00	82.00	82.00	85.00	92.00	

Percentage take up of 3 & 4 year olds benefiting from some free early education

Warwickshire – Spring 2022
Statistical Neighbour View 5/11 LA Ranking 28/151
National – 88%

Warwickshire	100.00	100.00	102.00	101.00	99.00	98.00	95.00	95.00	

***Internal monitoring figures against DfE list take up.**
*Mid year monitoring score figures - DfE
Figures in red text denote periods where take up will have been impacted by Covid-19

Providers now report a reduction in limiting factors preventing them from offering more places as needed, with only 2.2% of providers reporting COVID-19 as being a factor.

Parent / carer confidence to access places for early years children generally appears to be returning to a pre- pandemic level as occupancy levels are increasing. It is however to be noted that possibly due to an increase in home working patterns the demand for school aged before and after school care is currently reduced putting sustainability pressures on this sector especially where providing services to smaller schools. The LA continues to offer localised support where out of school place pressures occur and key solutions where possible are to utilise childminders and school provision to stabilise places to meet need. Effective sign posting and brokerage support from the Family Information Service provide the opportunity to work directly with parents / carers who have specific requirements to find a solution to their need.

There is a growth in provider confidence that current delivery models are meeting user needs with this seeing an increase in confidence from 16.2% of providers up to 68.2%. Ongoing support and advise remains available from the LA team to assist providers where they identify the need to evaluate and develop models to meet need including the use of localised place sufficiency and birth data. This sits alongside long term place development plans to meet increased need created by housing.

Finance - Returns continue to indicate that across the county, provision is in the main stable financially for the short term however confidence of the sector is lower in predicting how the long term future will impact them financially.

Key factors continue to be raised by the sector with a consistent theme being linked to central government funding rates for early education funded places. Warwickshire continues to pass 100% of 2 year funding allocations to providers and in 2021 passed 100% of the annual increase for 3 and 4 year old rates to the sector while working within the required retention of 5% of the funding to maintain central services to deliver the early education funding requirements to the sector in line with statutory regulations including SEND support services.

A slight reduction in numbers of providers reported being able to access some levels of additional COVID-19 financial support to aid their ongoing sustainability, however, this correlates with the gradual reduction of COVID-19 support grants available for the sector and businesses as a whole.

The LA will continue to ensure robust and regular signposting continues for the sector to support with access to available grants by way of weekly early years and childcare briefings, social media information sharing and twice termly business focused newsletters. In addition, the LA facilitated the opportunity for free online business training to be accessed during the early part of 2021 to aid and support settings with their financial planning.

Business Support Virtual training evaluation	Numbers	Percentages
Number of settings emailed (02.02.21)	701	100%
Number of settings registered to attend	49	7%
Number of settings attended both sessions	33	5%
Number of settings booked but didn't attend either session	6	1%
Number of settings booked but didn't attend 2nd session	10	20%

Recruitment and Retention - the survey findings continue to raise increasing concern around staffing and recruitment challenges with double the providers reporting issues compared to 2020. This now sees over 50% of settings reporting difficulties. Due to the growing issues being reported the LA has undertaken partnership working throughout 2021 with its Economy and Skills Team to implement round table discussions and a solution focused approach such as opportunities to record promotional materials to attract apprentices to the workplace. Providers that were expected to have teams of staff were invited to participate in the events.

Staffing Recruitment & Retention round table attendance		
	Numbers of providers	**Percentages**
Number of settings contacted	359	100%
Number of settings completed survey	25	7%
Number of settings registered to attend	22	6%
Number of settings attended	10	3%
1:1 meetings were carried out with 2 settings who advised that they were unable to attend booked places.		

LA service support – an opportunity for the sector to feedback on LA support has provided some useful information to aid direction of the teams work focus. 83.2% of providers indicated that they require no additional support from the LA.

The support implemented over the last 12 months will continue to be used to share the relevant key information with the sector and build strong, accessible, up to date resources. The LA will continue to take into consideration the responses and requests from the sector. The developments include a new website for both 'business as usual' and COVID-19 information, regular business newsletters, ongoing access to termly managers meetings, a raised marketing programme to aid the increase in occupancy levels and actions to support the issue of recruitment and retention. Going forwards additional information will be provided for the sector to clarify the details of how LAs are paid the early education funding, how this must be managed and how funding rates are informed. Additional support is being reviewed linked to support with marketing including the offer of direct resources to providers.

The team continues to review and develop all systems and processes with considerations to making them as user friendly as possible for the sector while endeavouring to reduce administrative burdens. An example of this being the introduction of electronic parental declaration forms for early education funded places which now removes the need to print hard copy versions with the form now being usable as an email and online completed document. The use of the Synergy Portal by providers to submit funding claims continues to be reviewed with the new Estimate function implemented in 2020 and the LA will be launching a new Adjustment tab for Spring Term 2022 making the ongoing claims process easier and via one system.

2021 Business Health Check response statistics

There were **507** responses in total, representing a 100% response rate by funded providers.

Responses were received from all districts, and from all Lower Early Years Planning Areas within each district.

EARLY YEARS DISTRICT	AS % OF 2021 RESPONSES	AS % OF 2020 RESPONSES
Warwick	**23.3%**	23.3%
Rugby	**21.7%**	21.7%
Nuneaton and Bedworth	**20.9%**	21.3%
Stratford	**19.3%**	19.4%
North Warks	**14.8%**	14.2%

The majority of responses were received from **childminders** and **day nurseries**.

SERVICE TYPE	AS % OF 2021 RESPONSES	AS % OF 2020 RESPONSES
Childminder(s)	**40.4%**	42.1%
Day Nursery	**30.8%**	30.2%
Pre-School	**15.0%**	15.0%
Maintained Nursery Class/School	**8.1%**	7.3%
Academy Nursery Class	**2.0%**	2.6%
Out of School Care	**2.0%**	1.0%
Nursery Units of Independent Schools	**1.0%**	0.8%
Private Nursery School	**0.6%**	0.6%
Holiday Scheme	**0.2%**	0.4%

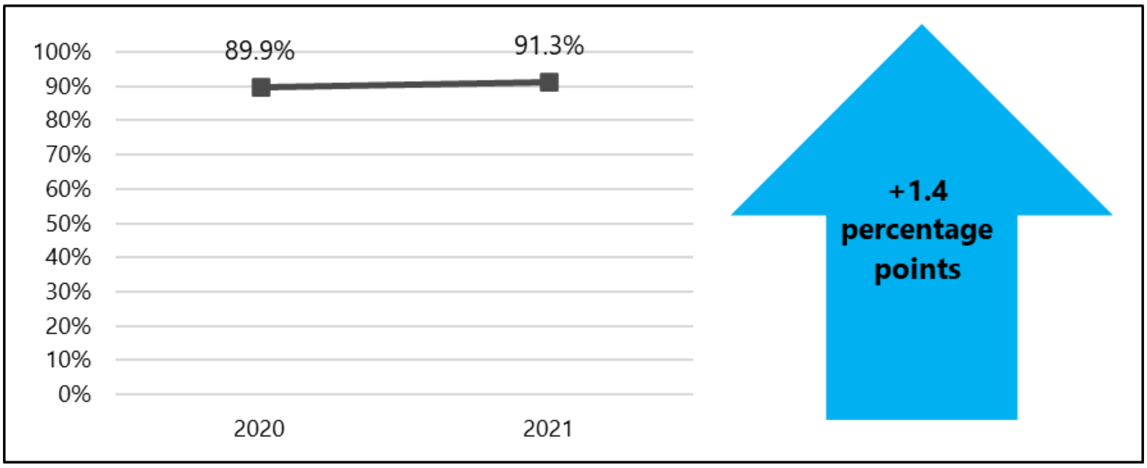
The majority of responses were received from **sole traders** and **private limited businesses**.

LEGAL STRUCTURE	AS % OF 2021 RESPONSES	AS % OF 2020 RESPONSES
Sole Trader	**43.4%**	43.5%
Private Ltd Business	**24.3%**	26.7%
LA Maintained Nursery Class / School	**6.3%**	7.7%
Company Ltd by Guarantee	**5.7%**	5.5%
School Run Provision (Section 27 Care)	**5.7%**	4.0%
Academy	**4.7%**	5.1%
Charitable Incorporated Organisation (CIO)	**3.9%**	3.8%
Charity (Unincorporated)	**3.0%**	2.4%
Other	**1.8%**	0.6%
Limited Liability Partnership (LLP)	**0.6%**	0.4%
Community Interest Company (CIC)	**0.2%**	0.2%
Co-operative business	**0.2%**	0.2%
Partnership	**0.2%**	0.0%

The majority of **sole trader** respondents are childminders.

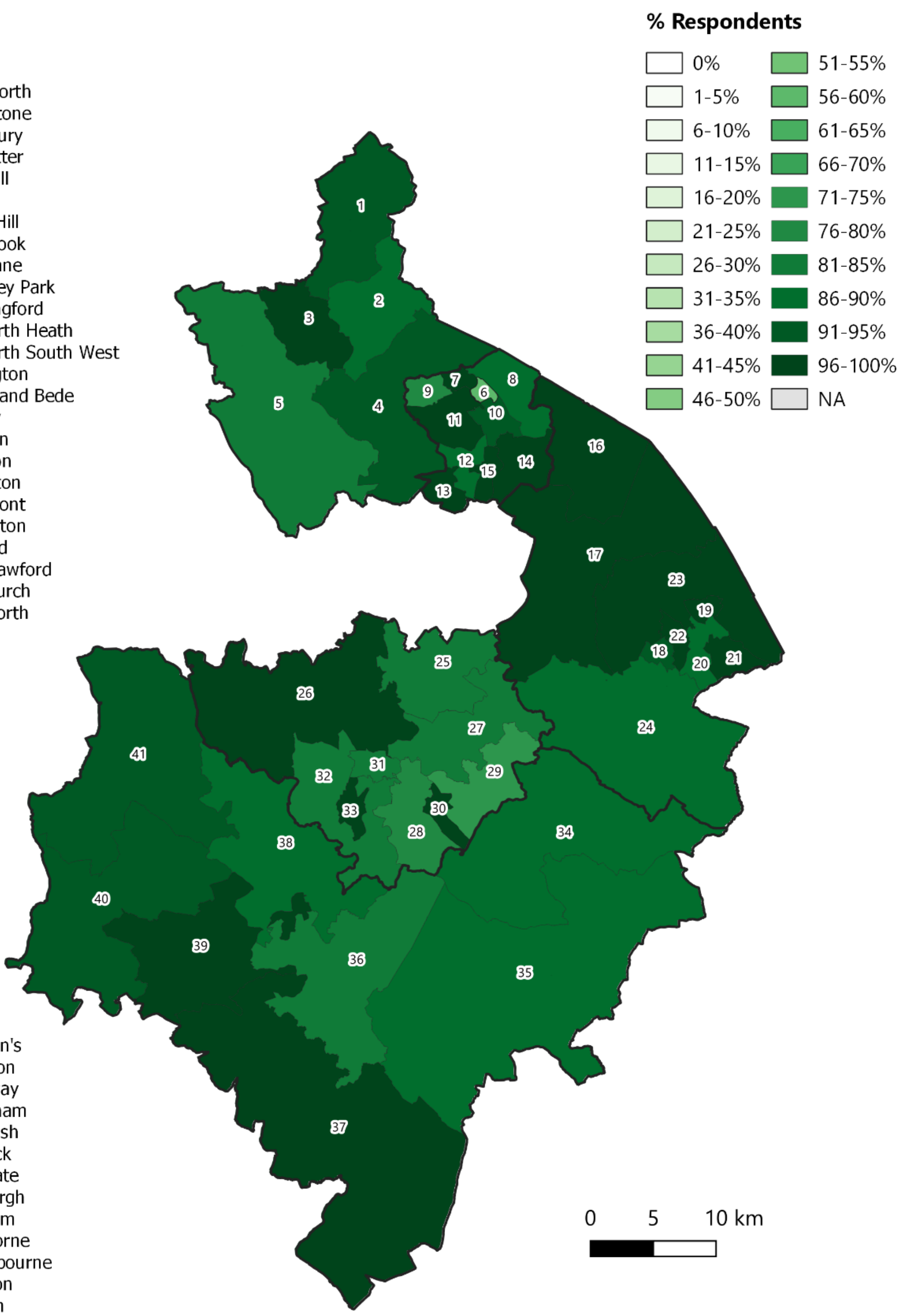
Do you offer 2, 3 & 4 year old funded places?

91.3% of respondents offer 2, 3 & 4-year-old funded places. *In 2020, it was 89.9%.*



SERVICE TYPE	% OF 2021 RESPONDENTS OFFERING FUNDED PLACES	% OF 2020 RESPONDENTS OFFERING FUNDED PLACES	PERCENTAGE POINTS CHANGE
Nursery Units of Independent Schools	**100.0%**	100.0%	
Private Nursery School	**100.0%**	100.0%	
Academy Nursery Class	**100.0%**	100.0%	
Day Nursery	**100.0%**	99.3%	+0.7
Pre-School	**97.4%**	100.0%	-2.6
Maintained Nursery Class/School	**95.1%**	97.3%	-2.2
Childminder(s)	**84.9%**	79.3%	+5.6
Out of School Care	**20.0%**	40.0%	-20.0
Holiday Scheme	**0.0%**	0.0%	

2021 RESPONDENTS OFFERING 2, 3 & 4 YEAR OLD FUNDED PLACES

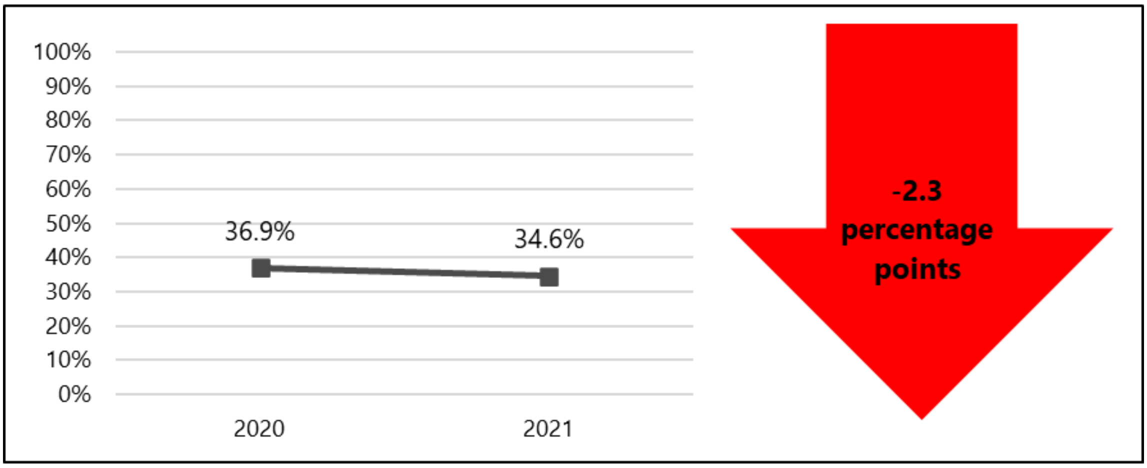


1 Polesworth
2 Atherstone
3 Kingsbury
4 Mancetter
5 Coleshill
6 Abbey
7 Camp Hill
8 Ladybrook
9 Park Lane
10 Riversley Park
11 Stockingford
12 Bedworth Heath
13 Bedworth South West
14 Bulkington
15 Poplar and Bede
16 Wolvey
17 Wolston
18 Cawston
19 Boughton
20 Claremont
21 Hillmorton
22 Oakfield
23 Long Lawford
24 Dunchurch
25 Kenilworth
26 St. John's
27 Lillington
28 Kingsway
29 Sydenham
30 Whitnash
31 Warwick
32 Westgate
33 Newburgh
34 Southam
35 Lighthorne
36 Wellesbourne
37 Shipston
38 Clopton
39 Stratford
40 Alcester
41 Studley

Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

Are there any limiting factors that affect the ability of the setting to accept more 2, 3 & 4 year old places?

34.6% of applicable respondents said there are no current limiting factors preventing them offering more places. *In 2020, it was 36.9%.*



SERVICE TYPE	% OF 2021 RESPONDENTS WITH NO LIMITS		% OF 2020 RESPONDENTS WITH NO LIMITS		PERCENTAGE POINTS CHANGE
Out of School Care	**50.0%**		0.0%		+50.0
Childminder(s)	**44.3%**		38.5%		+5.8
Academy Nursery Class	**40.0%**		30.8%		+9.2
Nursery Units of Independent Schools	**40.0%**		50.0%		-10.0
Maintained Nursery Class/School	**33.3%**		38.9%		-5.6
Pre-School	**28.4%**		35.5%		-7.1
Day Nursery	**26.9%**		36.2%		-9.3
Private Nursery School	**0.0%**		33.3%		-33.3
Holiday Scheme	**NA**	NA	NA	NA	

Staff-to-child ratios was the most common limiting factor cited (**31.7%** of respondents). *It was also the common limiting factor in 2020 (34.3% of respondents).*

LIMITING FACTOR	% OF 2021 RESPONDENTS		% OF 2020 RESPONDENTS		PERCENTAGE POINTS CHANGE
There are no current limiting factors	**34.6%**		36.9%		-2.3
Staff-to-child ratios	**31.7%**		34.3%		-2.6
Space / layout of setting	**26.3%**		22.2%		+4.1
Recruitment of new staff	**16.4%**		9.9%		+6.5
Sustainability of business	**9.7%**		7.9%		+1.8
Lack of suitably qualified applicants	**6.3%**		3.7%		+2.6
Personal preferance	**5.4%**		4.0%		+1.4
Additional needs of children	**3.7%**		4.4%		-0.7
COVID-19 restrictions	**2.2%**		10.8%		-8.6
Other limits	**25.9%**		30.5%		-4.6

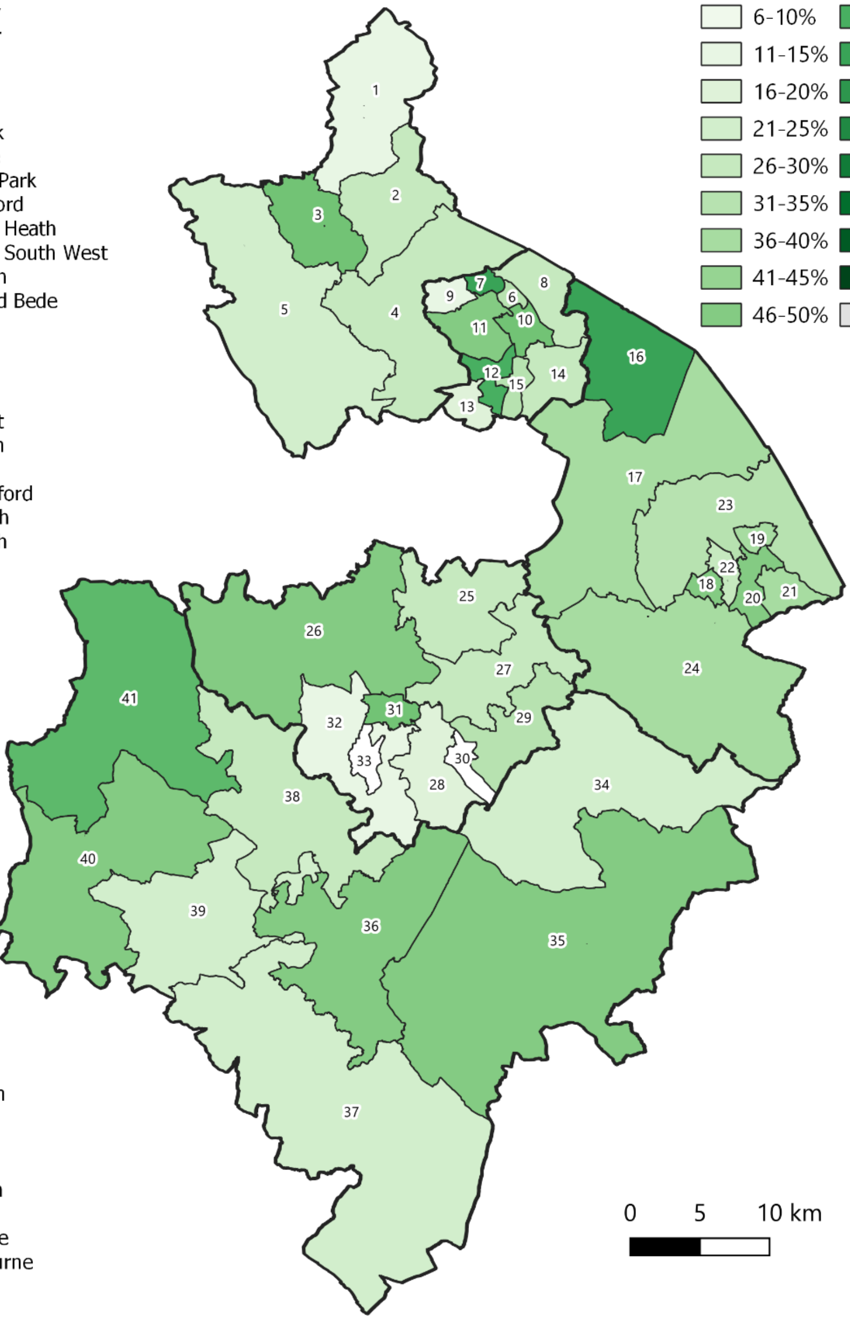
97.8% of respondents said that COVID-19 restrictions do not limit their ability to offer more funded places. *In 2020, it was 89.2% of respondents.*

APPLICABLE 2021 RESPONDENTS WITH NO LIMITING FACTORS AFFECTING THEIR ABILITY TO OFFER MORE 2, 3 & 4 YEAR OLD PLACES

% Respondents

	0%		51-55%
	1-5%		56-60%
	6-10%		61-65%
	11-15%		66-70%
	16-20%		71-75%
	21-25%		76-80%
	26-30%		81-85%
	31-35%		86-90%
	36-40%		91-95%
	41-45%		96-100%
	46-50%		NA

1 Polesworth
2 Atherstone
3 Kingsbury
4 Mancetter
5 Coleshill
6 Abbey
7 Camp Hill
8 Ladybrook
9 Park Lane
10 Riversley Park
11 Stockingford
12 Bedworth Heath
13 Bedworth South West
14 Bulkington
15 Poplar and Bede
16 Wolvey
17 Wolston
18 Cawston
19 Boughton
20 Claremont
21 Hillmorton
22 Oakfield
23 Long Lawford
24 Dunchurch
25 Kenilworth

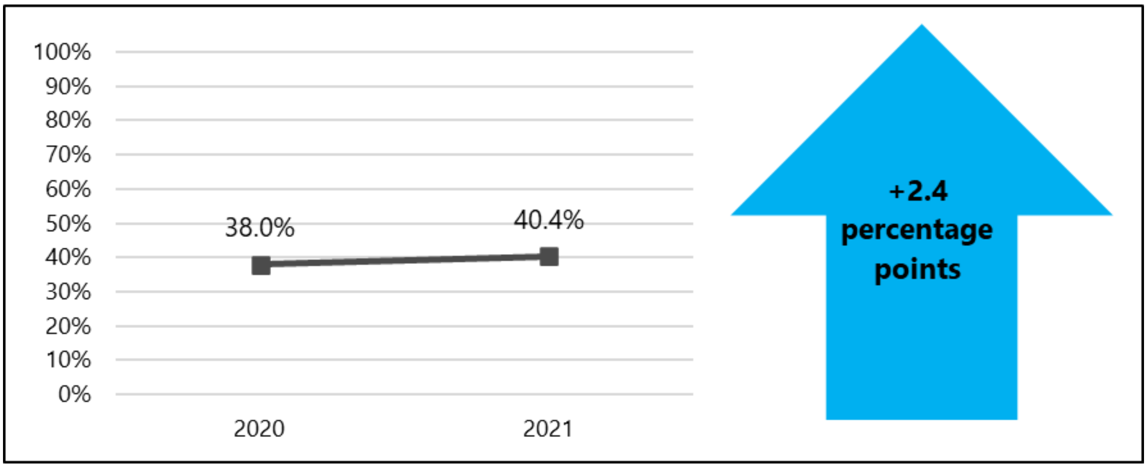


26 St. John's
27 Lillington
28 Kingsway
29 Sydenham
30 Whitnash
31 Warwick
32 Westgate
33 Newburgh
34 Southam
35 Lighthorne
36 Wellesbourne
37 Shipston
38 Clopton
39 Stratford
40 Alcester
41 Studley

Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

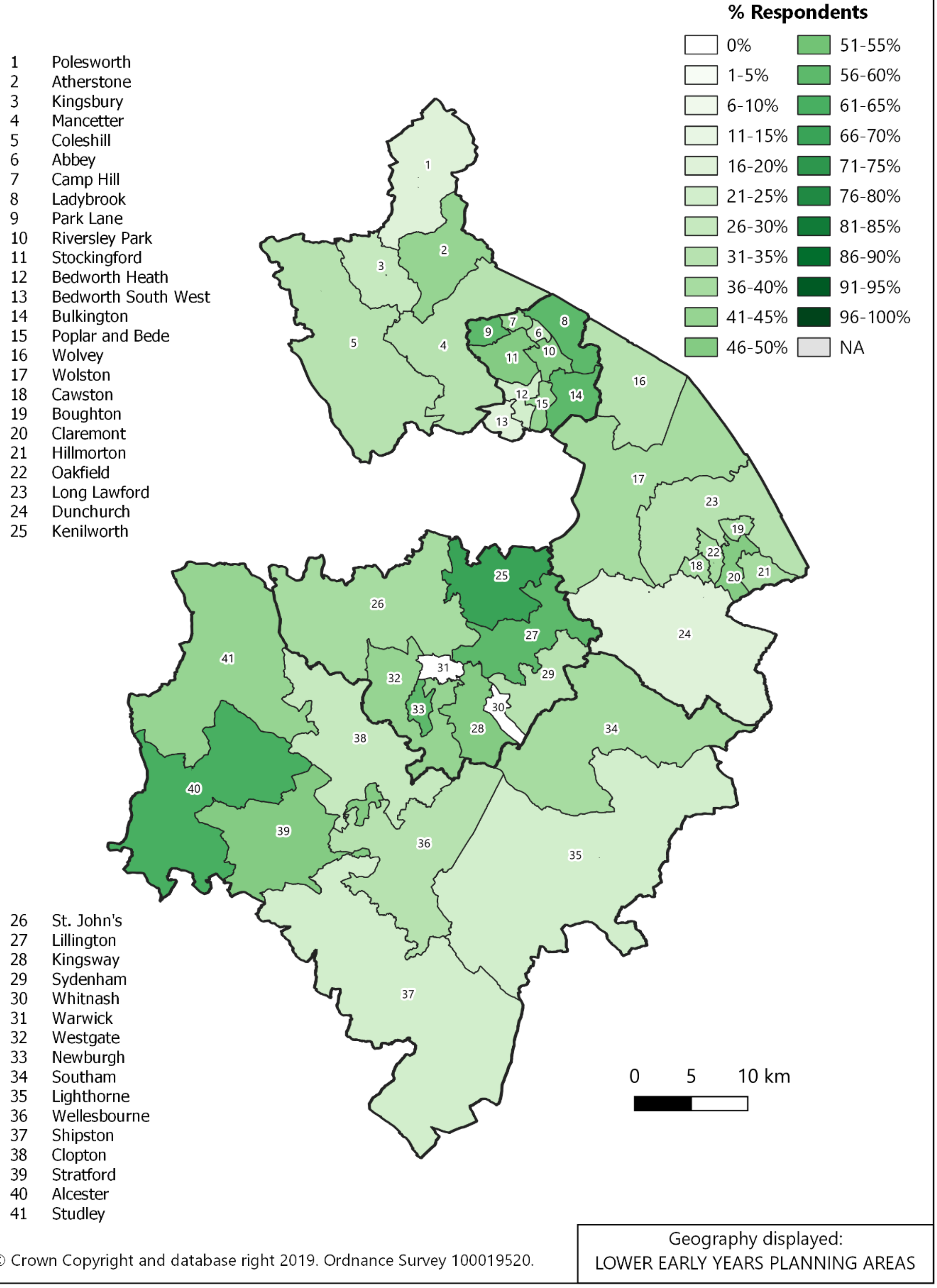
Do you offer funded places over more than 38 weeks?

40.4% of applicable respondents offer funded places over more than 38 weeks. *In 2020, it was 38.0% of respondents.*



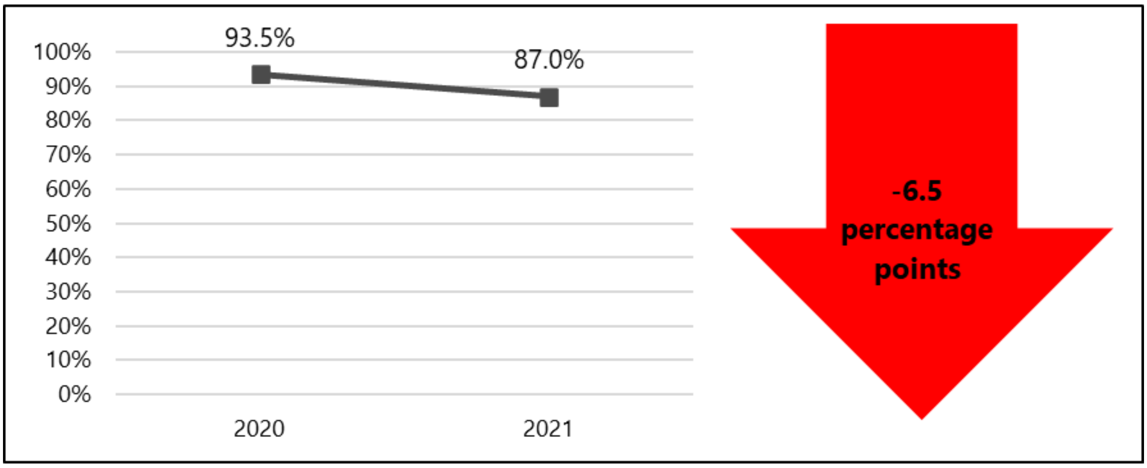
SERVICE TYPE	**% OF 2021 RESPONDENTS FUNDING OVER 38 WEEKS**		% OF 2020 RESPONDENTS FUNDING OVER 38 WEEKS		PERCENTAGE POINTS CHANGE
Day Nursery	**60.3%**		63.2%		-2.9
Childminder(s)	**47.7%**		40.2%		+7.5
Private Nursery School	**33.3%**		33.3%		
Nursery Units of Independent Schools	**20.0%**		25.0%		-5.0
Pre-School	**8.1%**		7.9%		+0.2
Maintained Nursery Class/School	**5.1%**		0.0%		+5.1
Out of School Care	**0.0%**		50.0%		-50.0
Academy Nursery Class	**0.0%**		0.0%		
Holiday Scheme	**NA**	NA	NA	NA	

APPLICABLE 2021 RESPONDENTS OFFERING FUNDED PLACES OVER MORE THAN 38 WEEKS



Do you have sufficient staff? If no, what is the reason why?

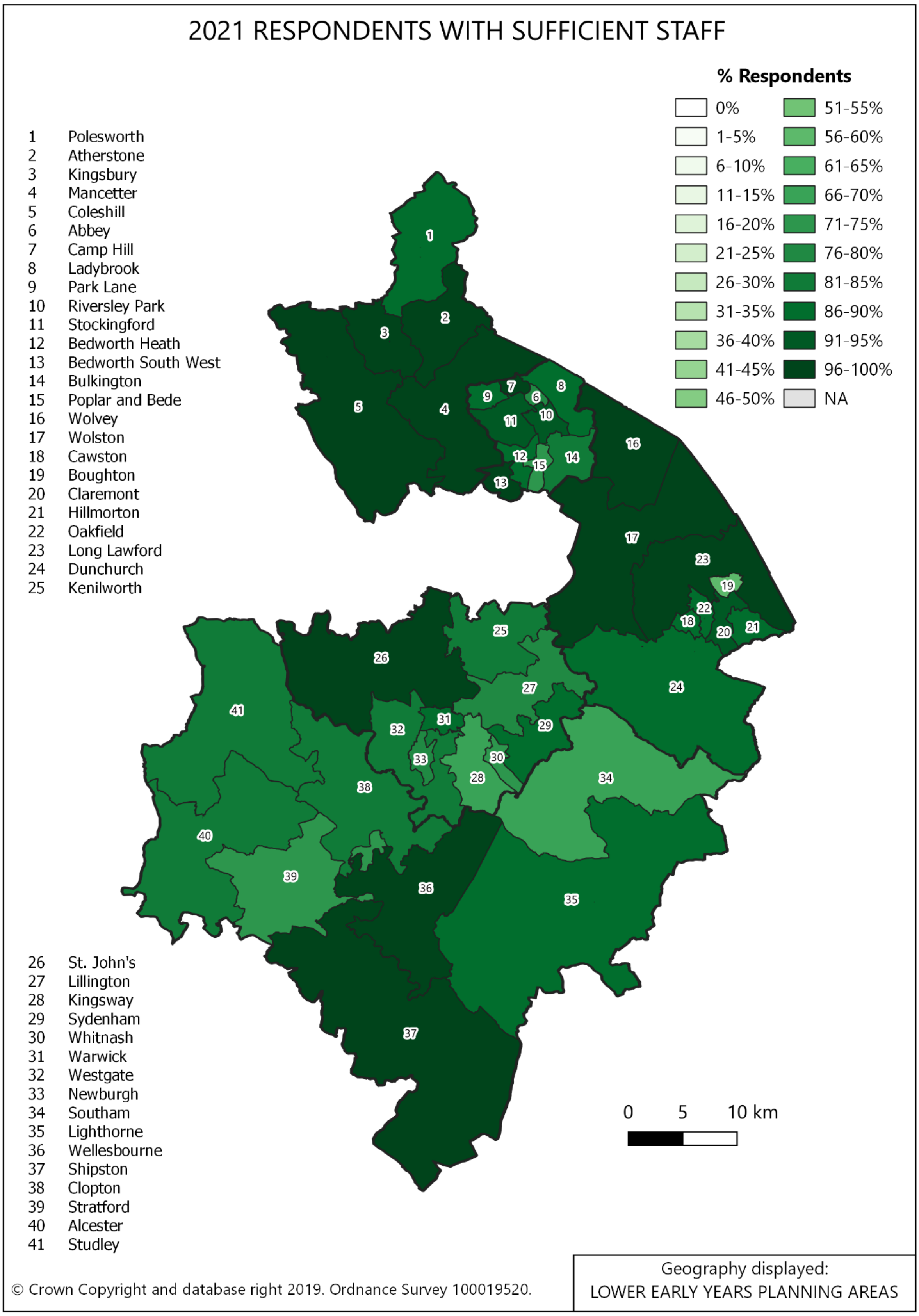
87.0% of respondents have sufficient staff. *In 2020, it was 93.5% of respondents.*



SERVICE TYPE	% OF 2021 RESPONDENTS WITH SUFFICIENT STAFF	% OF 2020 RESPONDENTS WITH SUFFICIENT STAFF	PERCENTAGE POINTS CHANGE
Private Nursery School	**100.0%**	100.0%	
Academy Nursery Class	**100.0%**	100.0%	
Nursery Units of Independent Schools	**100.0%**	100.0%	
Holiday Scheme	**100.0%**	50.0%	+50.0
Maintained Nursery Class/School	**97.6%**	97.3%	+0.3
Pre-School	**93.4%**	98.7%	-5.3
Childminder(s)	**92.7%**	94.8%	-2.2
Out of School Care	**80.0%**	80.0%	
Day Nursery	**72.4%**	88.2%	-15.8

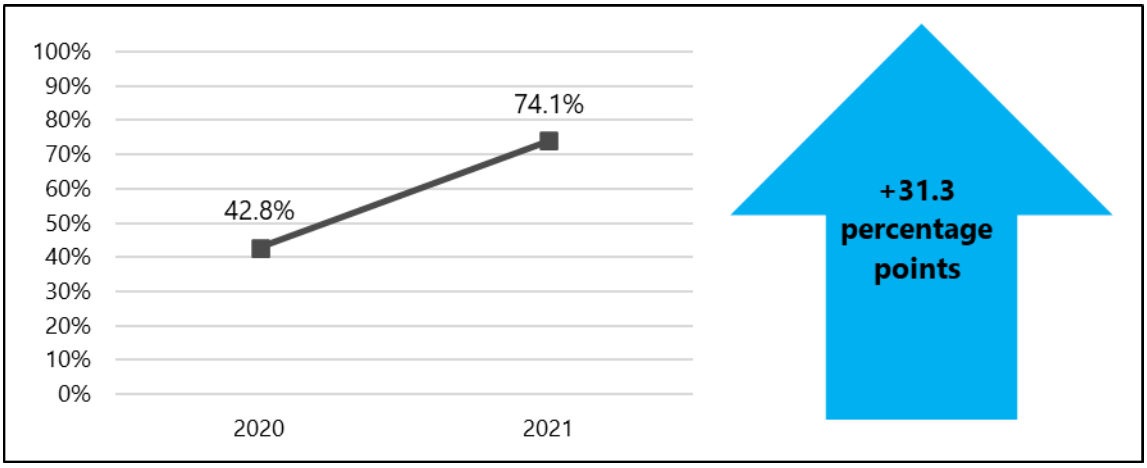
Of those respondents with insufficient staff, an **inability to recruit** was the most commonly cited reason (cited by **50.8%** of respondents). *It was also the most common reason cited in 2020, but the proportion of respondents citing it has increased markedly, from 27.6% last year.*

REASON FOR INSUFFICIENCY	% APPLICABLE 2021 RESPONDENTS	% APPLICABLE 2020 RESPONDENTS	PERCENTAGE POINTS CHANGE
Unable to recruit	**50.8%**	27.6%	+23.2
Staff have left to pursue other careers	**14.8%**	3.5%	+11.4
Staff unable to work due to shielding / illness	**1.6%**	20.7%	-19.1
Other	**32.8%**	48.3%	-15.5


2021 RESPONDENTS WITH SUFFICIENT STAFF
% Respondents
0%
1-5%
6-10%
11-15%
16-20%
21-25%
26-30%
31-35%
36-40%
41-45%
46-50%
51-55%
56-60%
61-65%
66-70%
71-75%
76-80%
81-85%
86-90%
91-95%
96-100%
NA
1 Polesworth
2 Atherstone
3 Kingsbury
4 Mancetter
5 Coleshill
6 Abbey
7 Camp Hill
8 Ladybrook
9 Park Lane
10 Riversley Park
11 Stockingford
12 Bedworth Heath
13 Bedworth South West
14 Bulkington
15 Poplar and Bede
16 Wolvey
17 Wolston
18 Cawston
19 Boughton
20 Claremont
21 Hillmorton
22 Oakfield
23 Long Lawford
24 Dunchurch
25 Kenilworth
26 St. John's
27 Lillington
28 Kingsway
29 Sydenham
30 Whitnash
31 Warwick
32 Westgate
33 Newburgh
34 Southam
35 Lighthorne
36 Wellesbourne
37 Shipston
38 Clopton
39 Stratford
40 Alcester
41 Studley
0 5 10 km
© Crown Copyright and database right 2019. Ordnance Survey 100019520.
Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

<u>Please specify your overall occupancy figures for Summer term 2020 and Summer term 2021.</u>

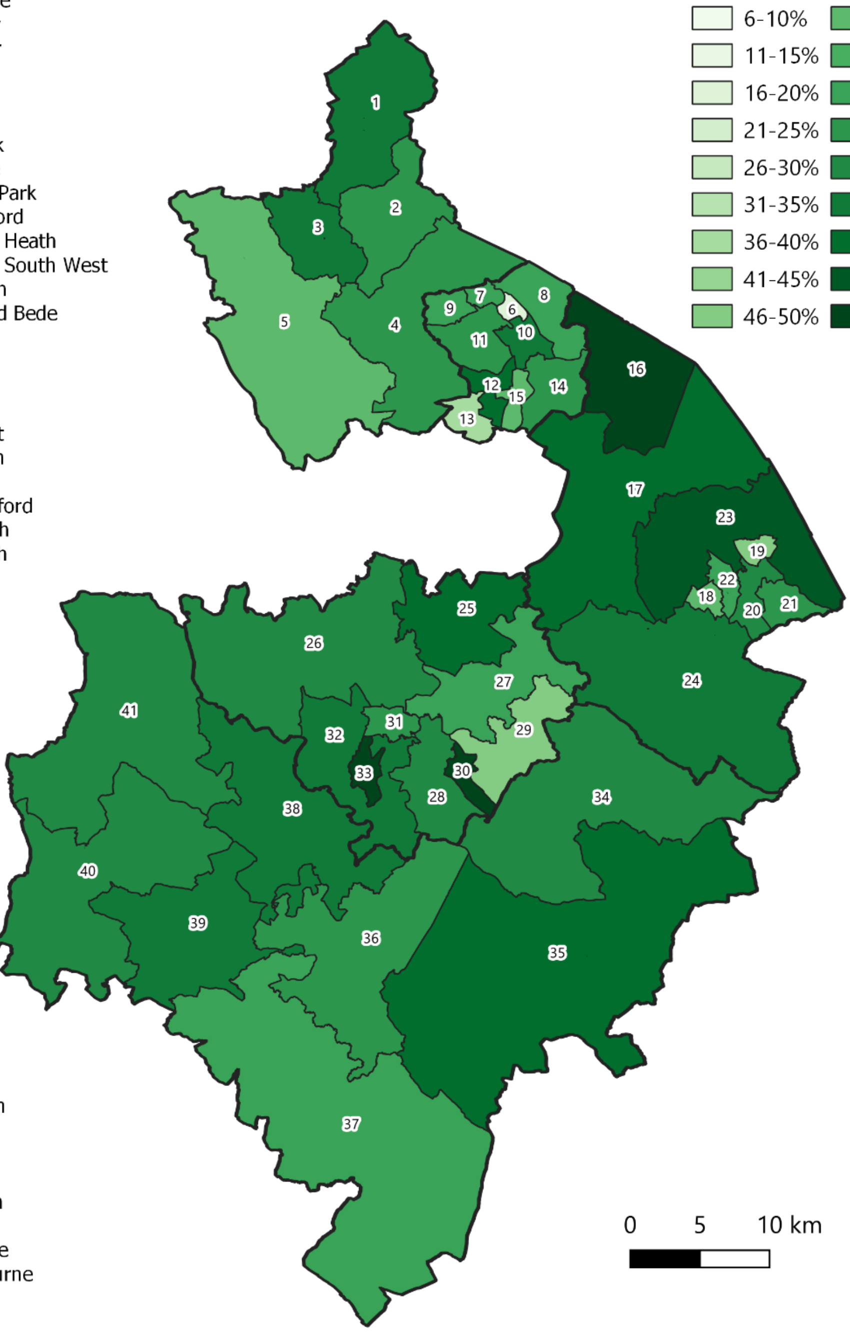
74.1% of respondents saw either an increase in occupancy or no change in occupancy in Summer term 2021 compared to Summer term 2020. *In the previous Health Check, 42.8% of respondents had seen either an increase in occupancy or no change in occupancy in Autumn term 2020 compared to Autumn term 2019.*



SERVICE TYPE	**% OF RESPONDENTS REPORTING OCCUPANCY INCREASE OR NO CHANGE FROM SUMMER TERM 2020 TO SUMMER TERM 2021**	% OF RESPONDENTS REPORTING OCCUPANCY INCREASE OR NO CHANGE FROM AUTUMN TERM 2019 TO AUTUMN TERM 2020	PERCENTAGE POINTS CHANGE
Nursery Units of Independent Schools	**100.0%**	50.0%	+50.0
Holiday Scheme	**100.0%**	0.0%	+100.0
Day Nursery	**80.8%**	35.3%	+45.5
Pre-School	**75.0%**	36.9%	+38.1
Childminder(s)	**73.7%**	50.2%	+23.5
Private Nursery School	**66.7%**	33.3%	+33.4
Maintained Nursery Class/School	**58.5%**	40.5%	+18.0
Out of School Care	**50.0%**	40.0%	+10.0
Academy Nursery Class	**50.0%**	61.6%	-11.6

RESPONDENTS WITH EITHER AN INCREASE IN OCCUPANCY OR NO CHANGE IN OCCUPANCY IN SUMMER 2021 COMPARED TO SUMMER 2020

1 Polesworth
2 Atherstone
3 Kingsbury
4 Mancetter
5 Coleshill
6 Abbey
7 Camp Hill
8 Ladybrook
9 Park Lane
10 Riversley Park
11 Stockingford
12 Bedworth Heath
13 Bedworth South West
14 Bulkington
15 Poplar and Bede
16 Wolvey
17 Wolston
18 Cawston
19 Boughton
20 Claremont
21 Hillmorton
22 Oakfield
23 Long Lawford
24 Dunchurch
25 Kenilworth



26 St. John's
27 Lillington
28 Kingsway
29 Sydenham
30 Whitnash
31 Warwick
32 Westgate
33 Newburgh
34 Southam
35 Lighthorne
36 Wellesbourne
37 Shipston
38 Clopton
39 Stratford
40 Alcester
41 Studley

Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

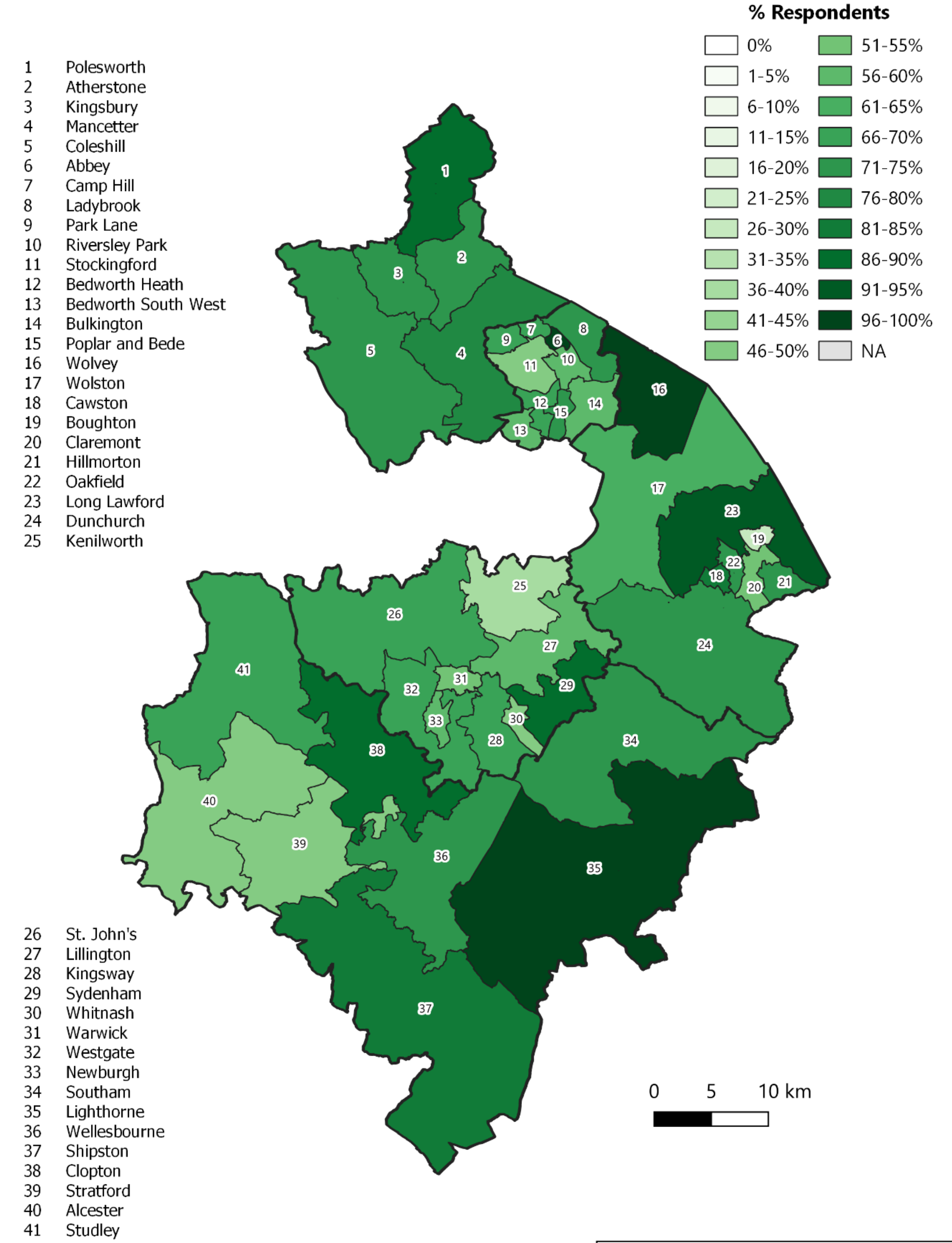
Please let us know if your attendance levels have returned to usual pre-COVID levels[1].

68.7% of respondents report that attendances levels are now higher than was usual prior to the pandemic or have returned to the same level as prior to the pandemic.

SERVICE TYPE	% OF RESPONDENTS REPORTING ATTENDANCE LEVELS HIGHER OR THE SAME AS BEFORE THE PANDEMIC
Nursery Units of Independent Schools	**100.0%**
Private Nursery School	**100.0%**
Academy Nursery Class	**80.0%**
Day Nursery	**78.9%**
Maintained Nursery Class/School	**70.7%**
Pre-School	**68.4%**
Childminder(s)	**60.4%**
Out of School Care	**40.0%**
Holiday Scheme	**0.0%**

[1] This question was posed for the first time in the 2021 Health Check.

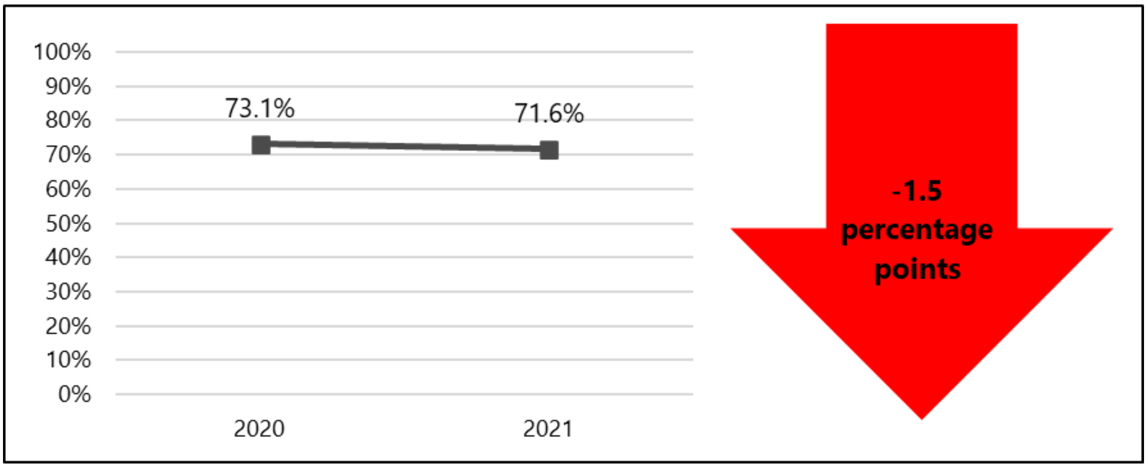
2021 RESPONDENTS WITH ATTENDANCE LEVELS THAT ARE HIGHER OR AT THE SAME LEVEL AS PRE-COVID LEVELS



Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

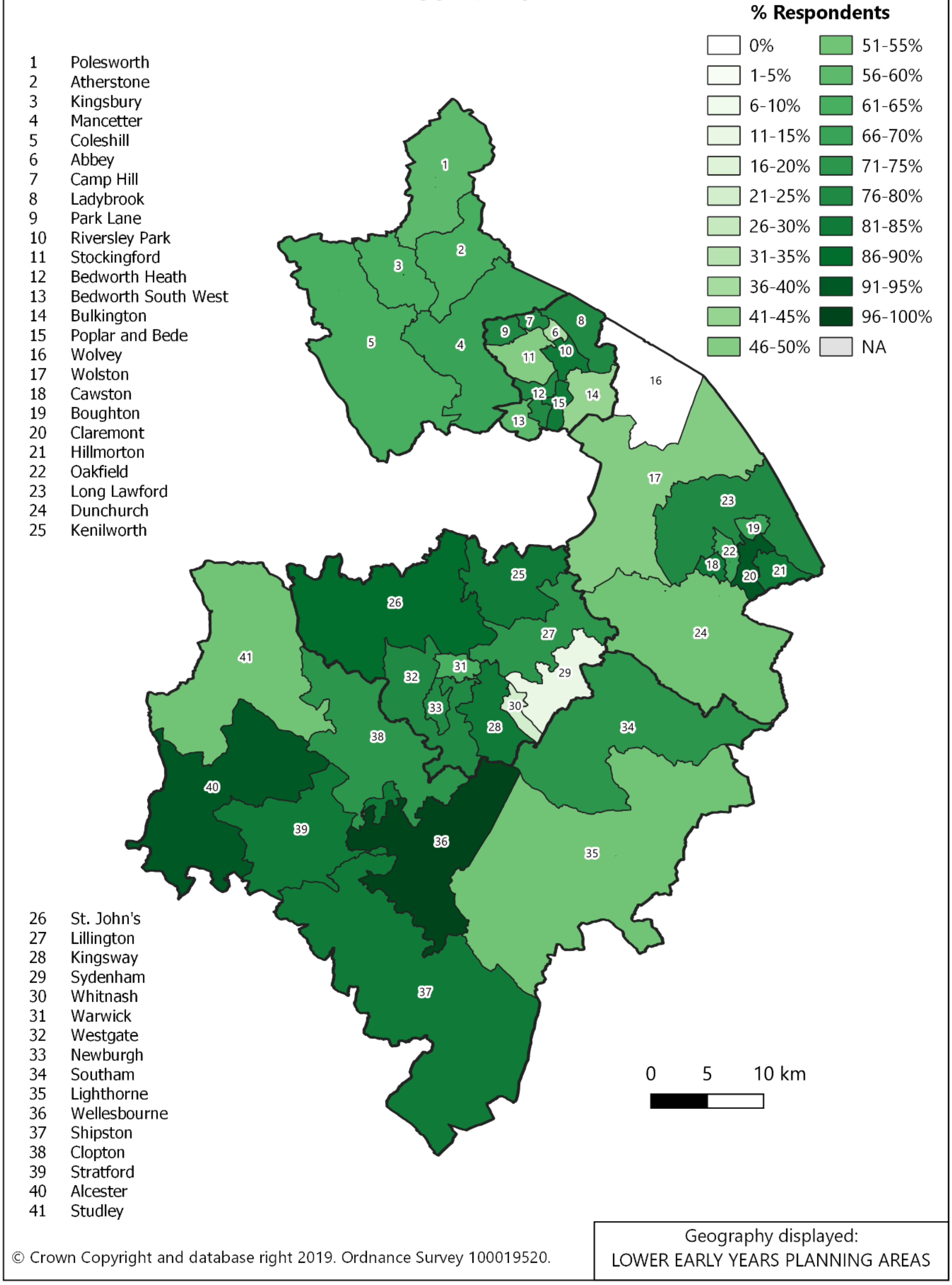
Have you been able to access financial support during COVID-19?

71.6% of respondents have been able to access financial support during COVID-19. *In 2020, it was 73.1% of respondents.*



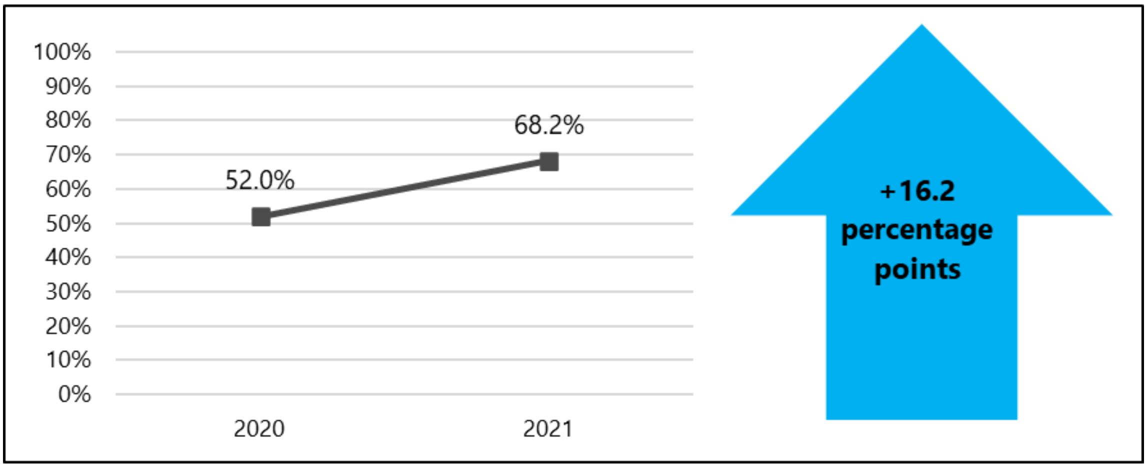
SERVICE TYPE	% OF 2021 RESPONDENTS ABLE TO ACCESS SUPPORT	% OF 2020 RESPONDENTS ABLE TO ACCESS SUPPORT	PERCENTAGE POINTS CHANGE
Holiday Scheme	**100.0%**	0.0%	+100.0
Childminder(s)	**82.9%**	83.1%	-0.2
Nursery Units of Independent Schools	**80.0%**	100.0%	-20.0
Day Nursery	**77.6%**	79.1%	-1.5
Pre-School	**56.6%**	53.9%	+2.7
Academy Nursery Class	**50.0%**	30.8%	+19.2
Out of School Care	**40.0%**	60.0%	-20.0
Maintained Nursery Class/School	**36.6%**	54.1%	-17.5
Private Nursery School	**0.0%**	0.0%	

2021 RESPONDENTS ABLE TO ACCESS FINANCIAL SUPPORT DURING COVID-19



Will you have to make any changes to your model of delivery to ensure your business remains sustainable?

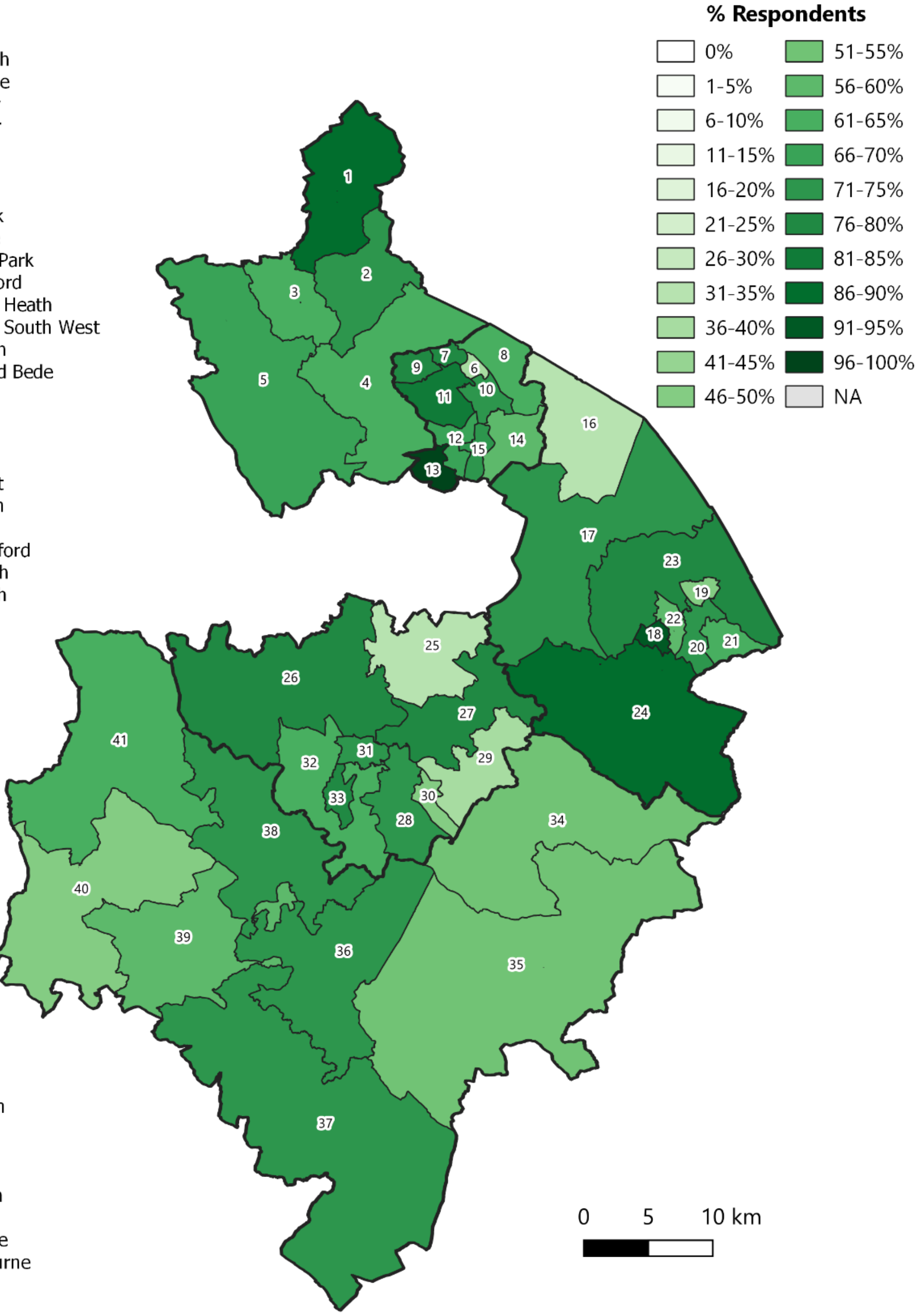
68.2% of respondents say they will not have to make changes to their delivery model to ensure the sustainability of their business. *In 2020, it was 52.0% of respondents.*



SERVICE TYPE	% OF 2021 RESPONDENTS NOT NEEDING TO CHANGE DELIVERY MODEL		% OF 2020 RESPONDENTS NOT NEEDING TO CHANGE DELIVERY MODEL		PERCENTAGE POINTS CHANGE
Nursery Units of Independent Schools	**100.0%**		75.0%		+25.0
Private Nursery School	**100.0%**		0.0%		+100.0
Childminder(s)	**74.6%**		62.0%		+12.6
Day Nursery	**65.4%**		44.4%		+21.0
Pre-School	**63.2%**		44.7%		+18.5
Academy Nursery Class	**60.0%**		61.5%		-1.5
Maintained Nursery Class/School	**58.5%**		45.9%		+12.6
Out of School Care	**50.0%**		20.0%		+30.0
Holiday Scheme	**NA**	NA	0.0%		

2021 RESPONDENTS NOT NEEDING TO MAKE CHANGES TO MODEL OF DELIVERY TO ENSURE BUSINESS REMAINS SUSTAINABLE

1	Polesworth
2	Atherstone
3	Kingsbury
4	Mancetter
5	Coleshill
6	Abbey
7	Camp Hill
8	Ladybrook
9	Park Lane
10	Riversley Park
11	Stockingford
12	Bedworth Heath
13	Bedworth South West
14	Bulkington
15	Poplar and Bede
16	Wolvey
17	Wolston
18	Cawston
19	Boughton
20	Claremont
21	Hillmorton
22	Oakfield
23	Long Lawford
24	Dunchurch
25	Kenilworth

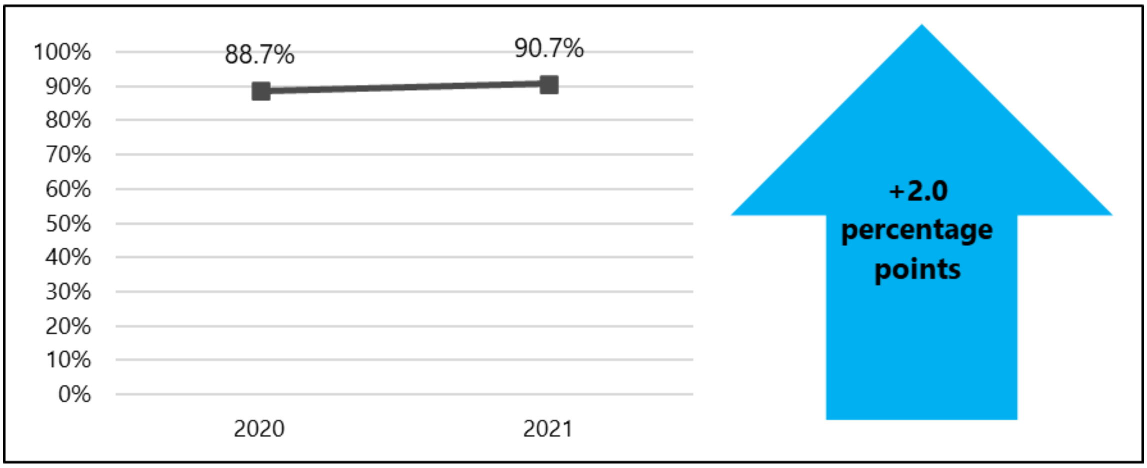


26	St. John's
27	Lillington
28	Kingsway
29	Sydenham
30	Whitnash
31	Warwick
32	Westgate
33	Newburgh
34	Southam
35	Lighthorne
36	Wellesbourne
37	Shipston
38	Clopton
39	Stratford
40	Alcester
41	Studley

Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

Is your business financially secure and able to continue operating for this academic year?

90.7% of respondents believe their business to be financially secure and able to continue operating through the academic year. *In 2020, it was 88.7% of respondents.*



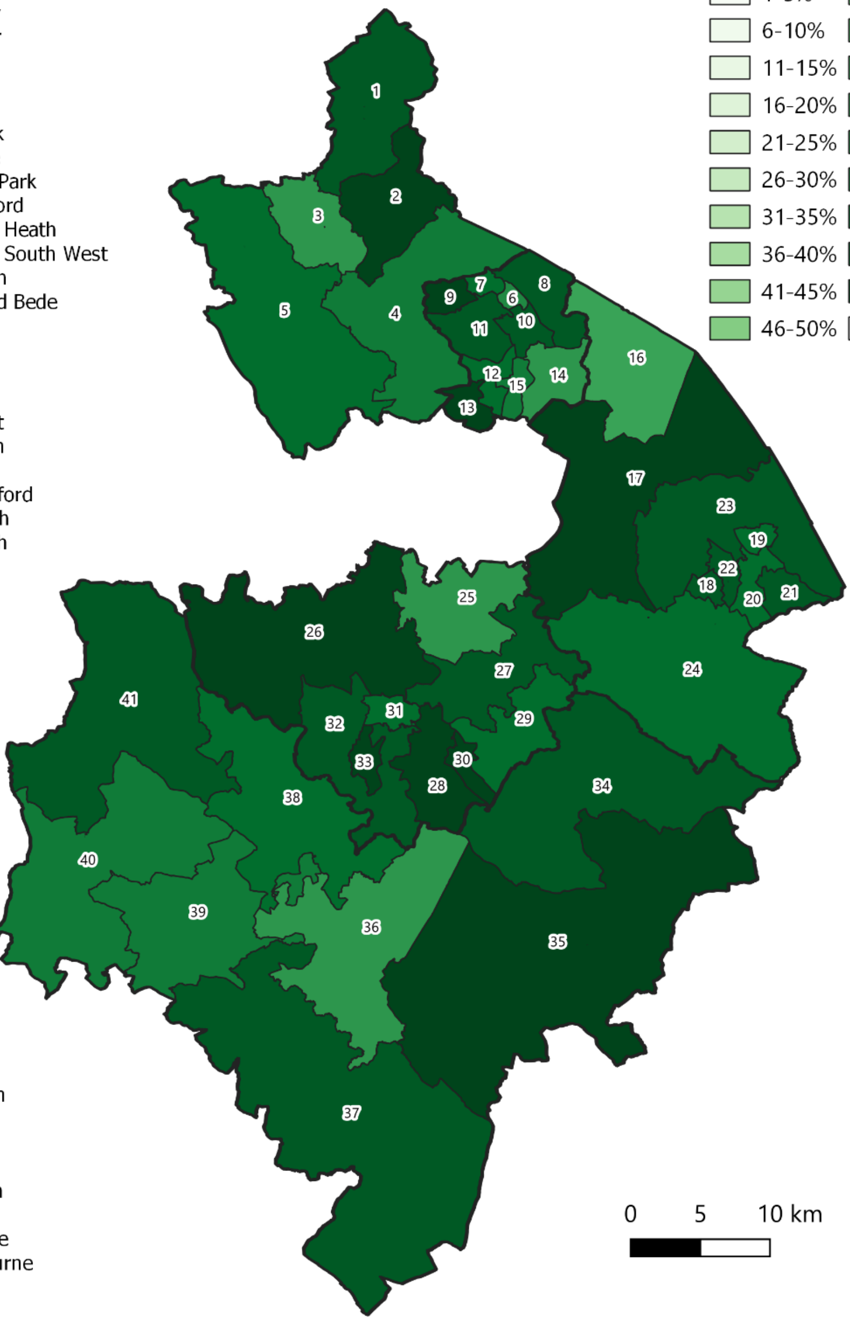
SERVICE TYPE	% OF 2021 RESPONDENTS FINANCIALLY SECURE	% OF 2020 RESPONDENTS FINANCIALLY SECURE	PERCENTAGE POINTS CHANGE
Nursery Units of Independent Schools	**100.0%**	100.0%	
Holiday Scheme	**100.0%**	50.0%	+50.0
Day Nursery	**96.8%**	92.2%	+4.6
Maintained Nursery Class/School	**95.1%**	94.6%	+0.5
Pre-School	**94.7%**	96.1%	-1.4
Childminder(s)	**84.9%**	82.2%	+2.7
Out of School Care	**80.0%**	100.0%	-20.0
Academy Nursery Class	**80.0%**	100.0%	-20.0
Private Nursery School	**66.7%**	66.7%	

2021 RESPONDENTS WITH BUSINESSES THAT ARE FINANCIALLY SECURE AND ABLE TO CONTINUE OPERATING FOR THIS ACADEMIC YEAR

% Respondents

0%	51-55%
1-5%	56-60%
6-10%	61-65%
11-15%	66-70%
16-20%	71-75%
21-25%	76-80%
26-30%	81-85%
31-35%	86-90%
36-40%	91-95%
41-45%	96-100%
46-50%	NA

1 Polesworth
2 Atherstone
3 Kingsbury
4 Mancetter
5 Coleshill
6 Abbey
7 Camp Hill
8 Ladybrook
9 Park Lane
10 Riversley Park
11 Stockingford
12 Bedworth Heath
13 Bedworth South West
14 Bulkington
15 Poplar and Bede
16 Wolvey
17 Wolston
18 Cawston
19 Boughton
20 Claremont
21 Hillmorton
22 Oakfield
23 Long Lawford
24 Dunchurch
25 Kenilworth

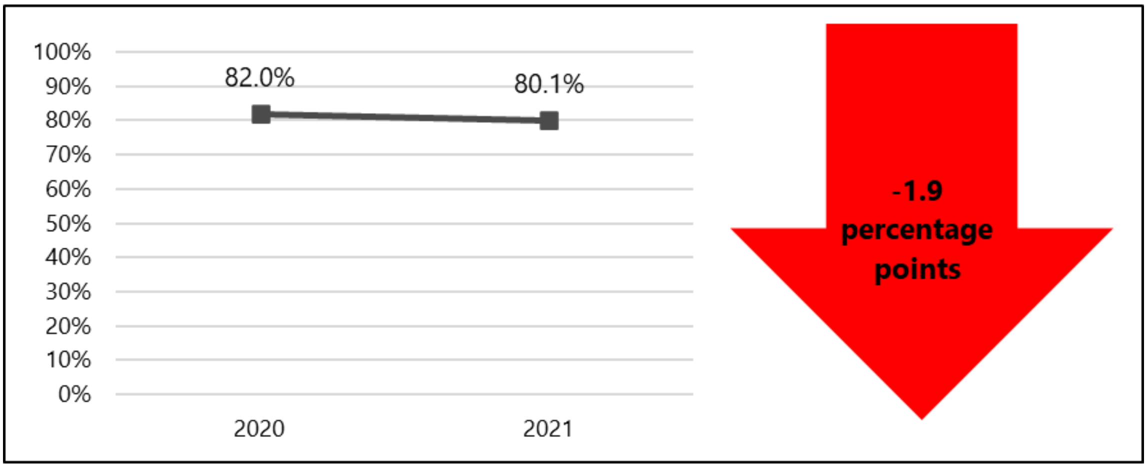


26 St. John's
27 Lillington
28 Kingsway
29 Sydenham
30 Whitnash
31 Warwick
32 Westgate
33 Newburgh
34 Southam
35 Lighthorne
36 Wellesbourne
37 Shipston
38 Clopton
39 Stratford
40 Alcester
41 Studley

Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

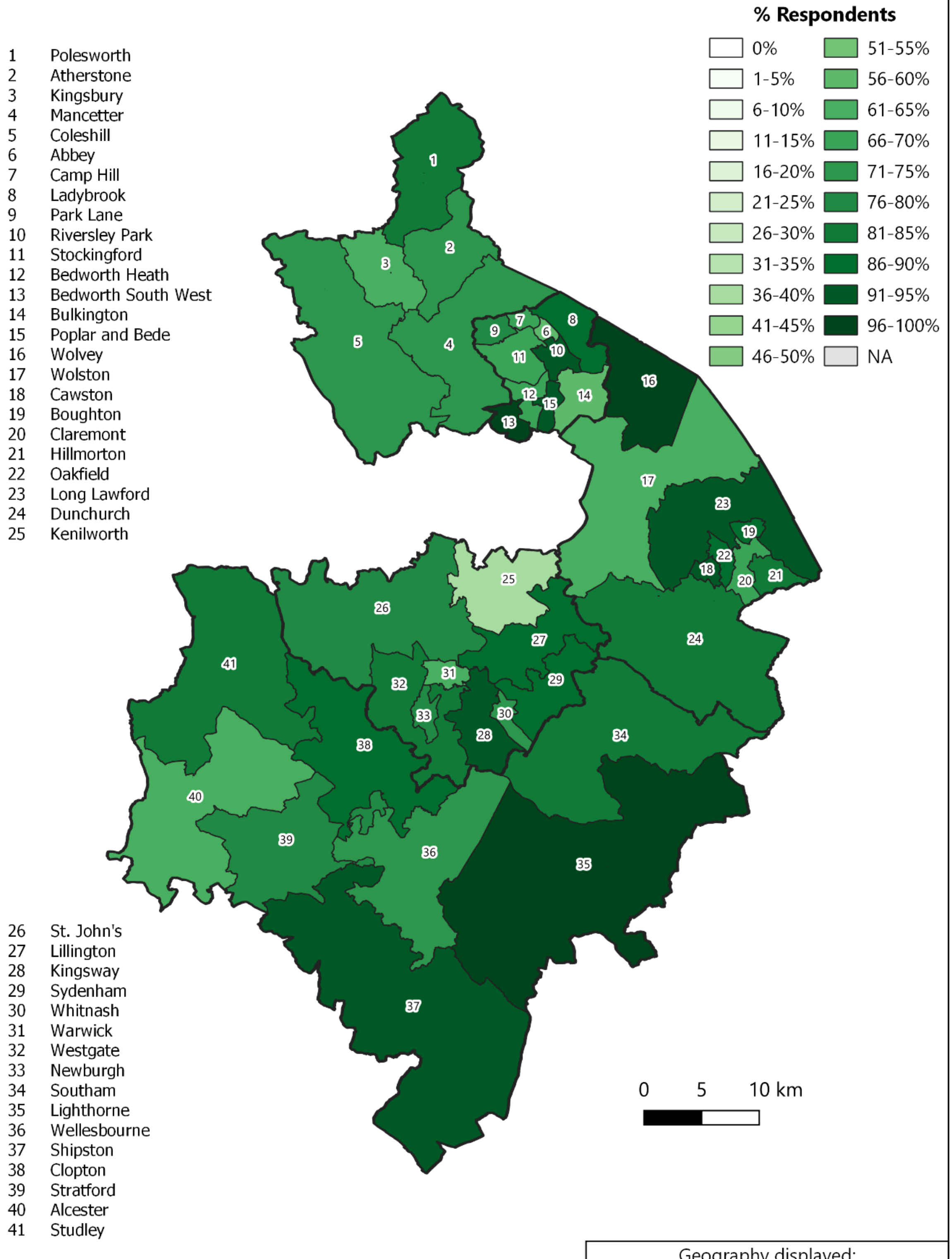
<u>To the best of your knowledge do you envisage your business being financially sustainable and continuing to operate long term?</u>

80.1% of respondents envisage their business being financially sustainable and continuing to operate long term. *In 2020, it was 82.0% of respondents.*



SERVICE TYPE	% OF 2021 RESPONDENTS SUSTAINABLE LONG TERM	% OF 2020 RESPONDENTS SUSTAINABLE LONG TERM	PERCENTAGE POINTS CHANGE
Nursery Units of Independent Schools	**100.0%**	100.0%	
Private Nursery School	**100.0%**	100.0%	
Holiday Scheme	**100.0%**	100.0%	
Academy Nursery Class	**90.0%**	92.3%	-2.3
Day Nursery	**89.7%**	86.3%	+3.4
Pre-School	**84.2%**	77.6%	+6.6
Maintained Nursery Class/School	**80.5%**	78.4%	+2.1
Childminder(s)	**70.7%**	80.3%	-9.6
Out of School Care	**60.0%**	60.0%	

2021 RESPONDENTS WHO ENVISAGE THEIR BUSINESSES BEING FINANCIALLY SUSTAINABLE AND CONTINUING TO OPERATE LONG TERM



Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

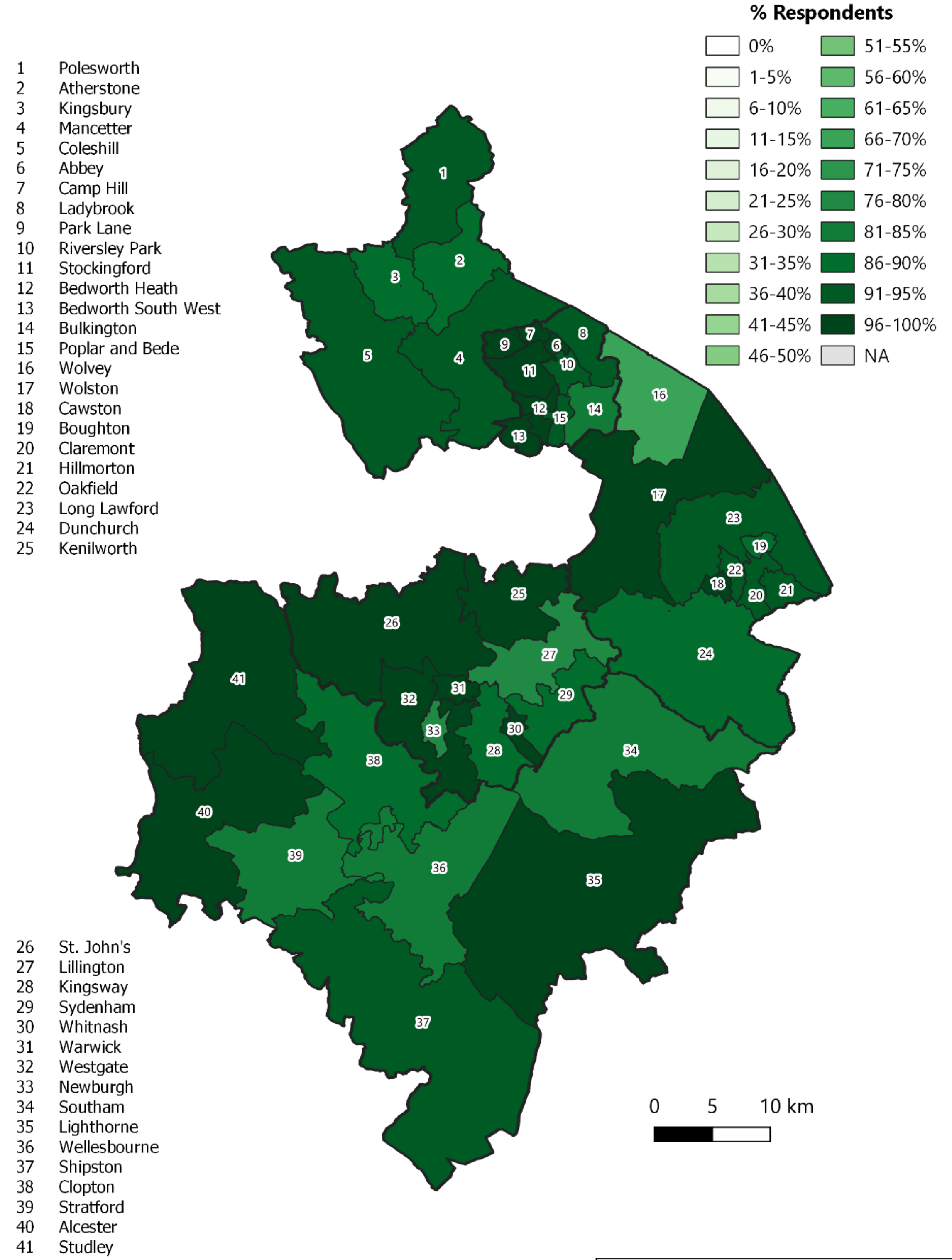
Have you been receiving the Early Years & Childcare Business Newsletter?[2]

93.5% of respondents have received the newsletter.

SERVICE TYPE	% OF RESPONDENTS RECEIVING THE NEWSLETTER
Nursery Units of Independent Schools	**100.0%**
Out of School Care	**100.0%**
Maintained Nursery Class/School	**95.1%**
Day Nursery	**94.9%**
Childminder(s)	**93.2%**
Pre-School	**92.1%**
Academy Nursery Class	**90.0%**
Private Nursery School	**66.7%**
Holiday Scheme	**0.0%**

[2] This question was posed for the first time in the 2021 Health Check.

2021 RESPONDENTS RECEIVING THE EARLY YEARS & CHILDCARE BUSINESS NEWSLETTER



Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

Do you have any business or financial concerns as we move towards the next academic year?[3]

70.4% of respondents say they have no business or financial concerns ahead of the next academic year.

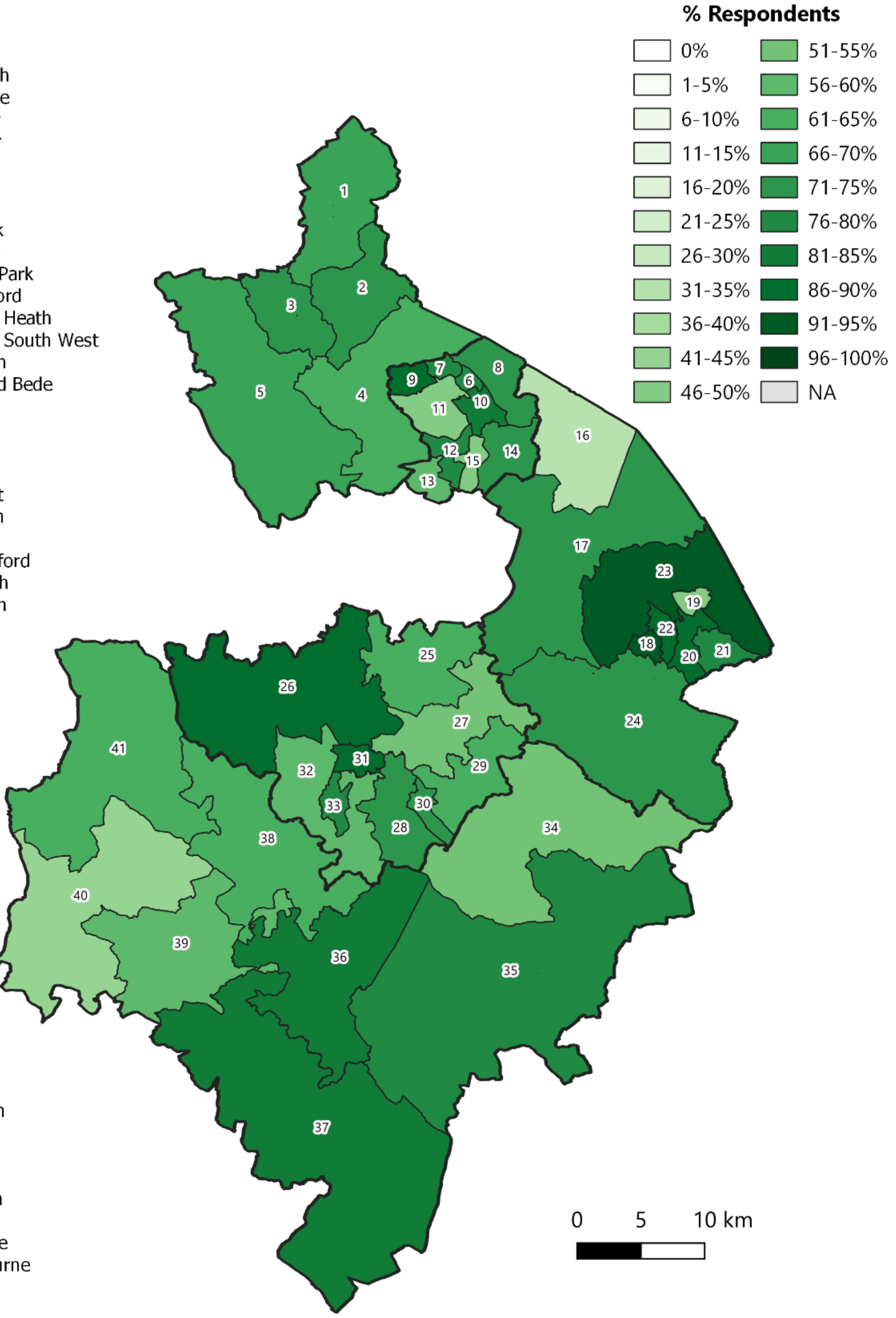
SERVICE TYPE	% OF RESPONDENTS WITH NO CONCERNS
Nursery Units of Independent Schools	**100.0%**
Holiday Scheme	**100.0%**
Childminder(s)	**82.0%**
Academy Nursery Class	**80.0%**
Private Nursery School	**66.7%**
Maintained Nursery Class/School	**65.9%**
Pre-School	**61.8%**
Out of School Care	**60.0%**
Day Nursery	**59.6%**

Of those respondents expressing concerns and specifying what those concerns were, **39.7%** cited financial sustainability.

CONCERNS	% OF APPLICABLE RESPONDENTS
Financial sustainability	**39.7%**
Attendance levels	**24.1%**
Staff recruitment	**15.6%**
Impact of current restrictions and future lockdowns	**13.5%**
Other	**7.1%**

[3] This question was posed for the first time in the 2021 Health Check.

2021 RESPONDENTS WITH NO BUSINESS OR FINANCIAL CONCERNS MOVING INTO THE NEXT ACADEMIC YEAR



1	Polesworth
2	Atherstone
3	Kingsbury
4	Mancetter
5	Coleshill
6	Abbey
7	Camp Hill
8	Ladybrook
9	Park Lane
10	Riversley Park
11	Stockingford
12	Bedworth Heath
13	Bedworth South West
14	Bulkington
15	Poplar and Bede
16	Wolvey
17	Wolston
18	Cawston
19	Boughton
20	Claremont
21	Hillmorton
22	Oakfield
23	Long Lawford
24	Dunchurch
25	Kenilworth
26	St. John's
27	Lillington
28	Kingsway
29	Sydenham
30	Whitnash
31	Warwick
32	Westgate
33	Newburgh
34	Southam
35	Lighthorne
36	Wellesbourne
37	Shipston
38	Clopton
39	Stratford
40	Alcester
41	Studley

Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

To help us support you when you need it, please let us know if there is anything we can support with.[4]

83.2% of respondents indicated that they require no additional support.

SERVICE TYPE	% OF RESPONDENTS REQUESTING NO ADDITIONAL SUPPORT
Holiday Scheme	**100.0%**
Maintained Nursery Class/School	**90.2%**
Academy Nursery Class	**90.0%**
Childminder(s)	**87.3%**
Pre-School	**81.6%**
Nursery Units of Independent Schools	**80.0%**
Day Nursery	**78.8%**
Out of School Care	**60.0%**
Private Nursery School	**33.3%**

Of those respondents indicating that they would like further support and specifying the type of support required, **40.5%** cited financial support, either in the form of funding/grants to sustain their businesses or via an increase in the hourly rate paid for funded places.

SUPPORT REQUESTED	% OF APPLICABLE RESPONDENTS
Financial support	**40.5%**
Information / guidance	**16.7%**
Help with staff recruitment	**14.3%**
Marketing support	**7.1%**
Reduction of paperwork / admin burden	**6.0%**
Training	**3.6%**
Other	**12.0%**

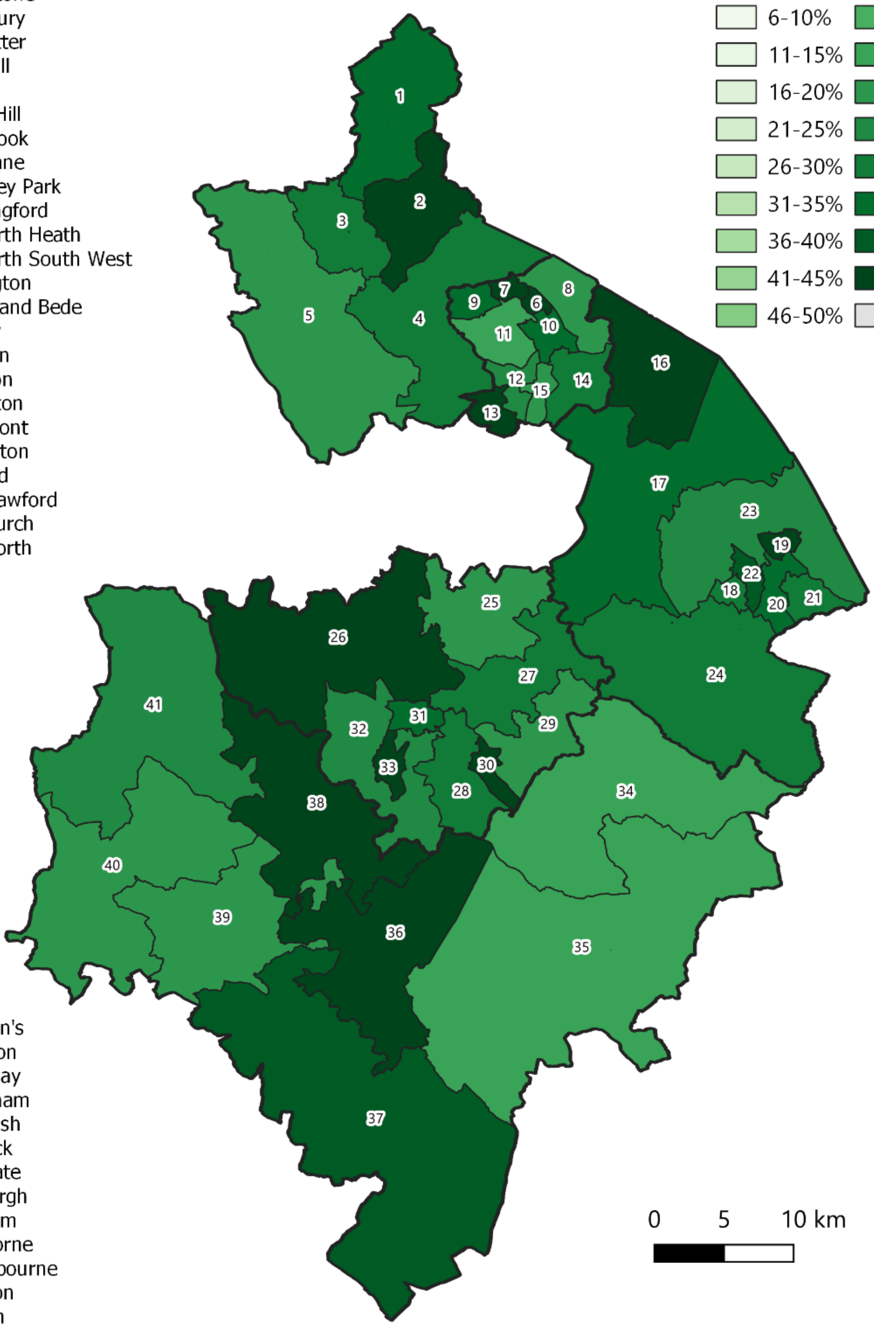
[4] This question was posed for the first time in the 2021 Health Check.

2021 RESPONDENTS INDICATING THAT THEY REQUIRE NO ADDITIONAL SUPPORT

% Respondents

0%	51-55%
1-5%	56-60%
6-10%	61-65%
11-15%	66-70%
16-20%	71-75%
21-25%	76-80%
26-30%	81-85%
31-35%	86-90%
36-40%	91-95%
41-45%	96-100%
46-50%	NA

1 Polesworth
2 Atherstone
3 Kingsbury
4 Mancetter
5 Coleshill
6 Abbey
7 Camp Hill
8 Ladybrook
9 Park Lane
10 Riversley Park
11 Stockingford
12 Bedworth Heath
13 Bedworth South West
14 Bulkington
15 Poplar and Bede
16 Wolvey
17 Wolston
18 Cawston
19 Boughton
20 Claremont
21 Hillmorton
22 Oakfield
23 Long Lawford
24 Dunchurch
25 Kenilworth



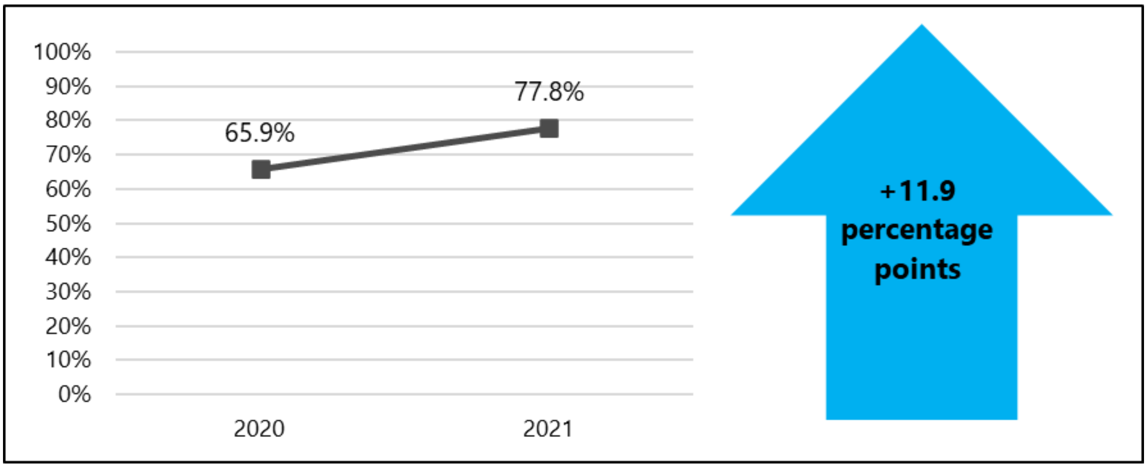
26 St. John's
27 Lillington
28 Kingsway
29 Sydenham
30 Whitnash
31 Warwick
32 Westgate
33 Newburgh
34 Southam
35 Lighthorne
36 Wellesbourne
37 Shipston
38 Clopton
39 Stratford
40 Alcester
41 Studley

0 5 10 km

Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

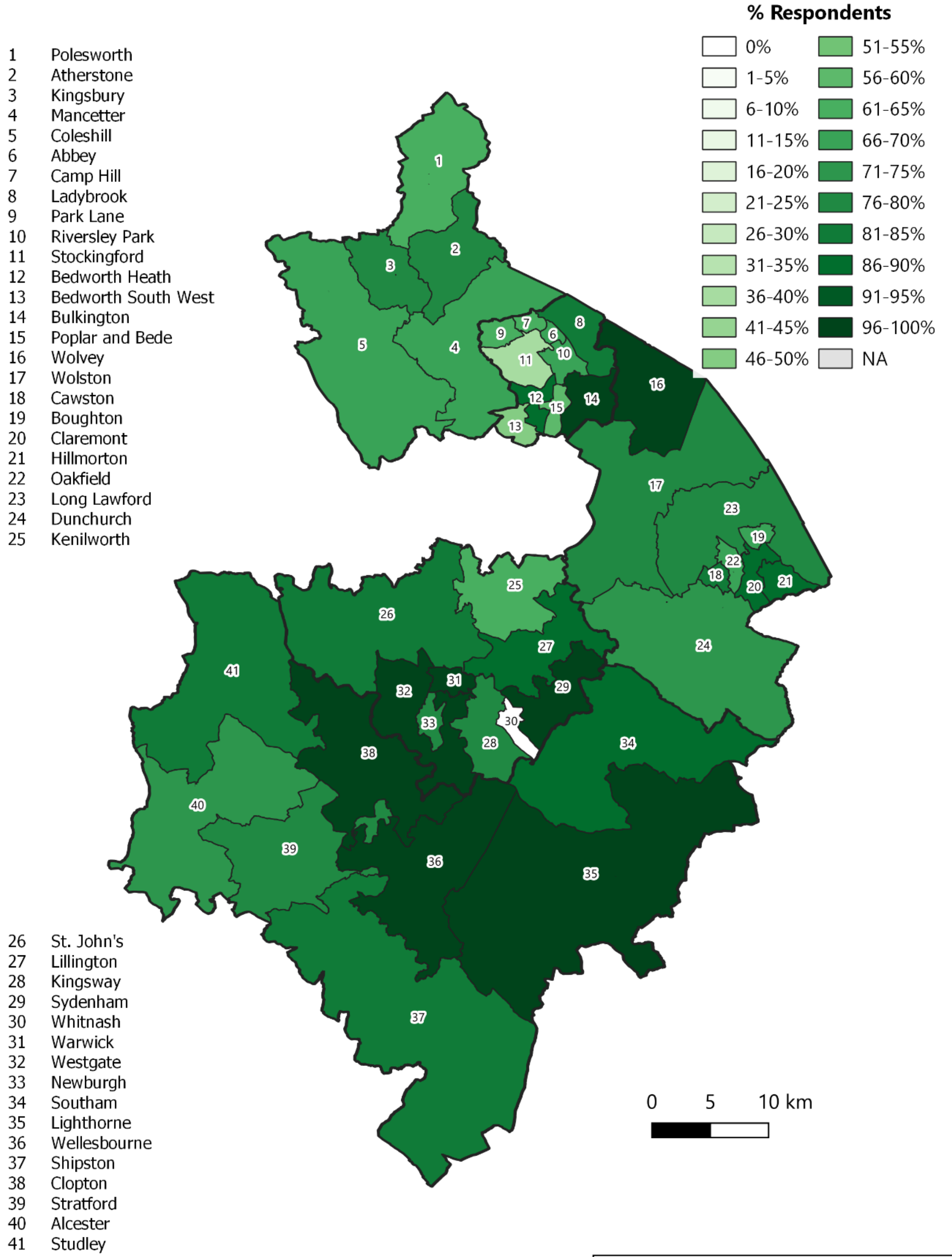
Demand for Under 2's places

77.8% of respondents have seen either an increase in demand for under 2’s places or no change in demand. *In 2020, it was 65.9% of respondents.*



SERVICE TYPE	% OF 2021 RESPONDENTS WITH INCREASE OR NO CHANGE IN DEMAND	% OF 2020 RESPONDENTS WITH INCREASE OR NO CHANGE IN DEMAND		PERCENTAGE POINTS CHANGE
Nursery Units of Independent Schools	**100.0%**	NA	NA	
Academy Nursery Class	**100.0%**	NA	NA	
Pre-School	**90.0%**	66.7%		+23.3
Day Nursery	**85.3%**	68.3%		+17.0
Childminder(s)	**73.2%**	64.9%		+8.3
Private Nursery School	**50.0%**	0.0%		+50.0
Maintained Nursery Class/School	**50.0%**	100.0%		-50.0
Out of School Care	**0.0%**	NA	NA	

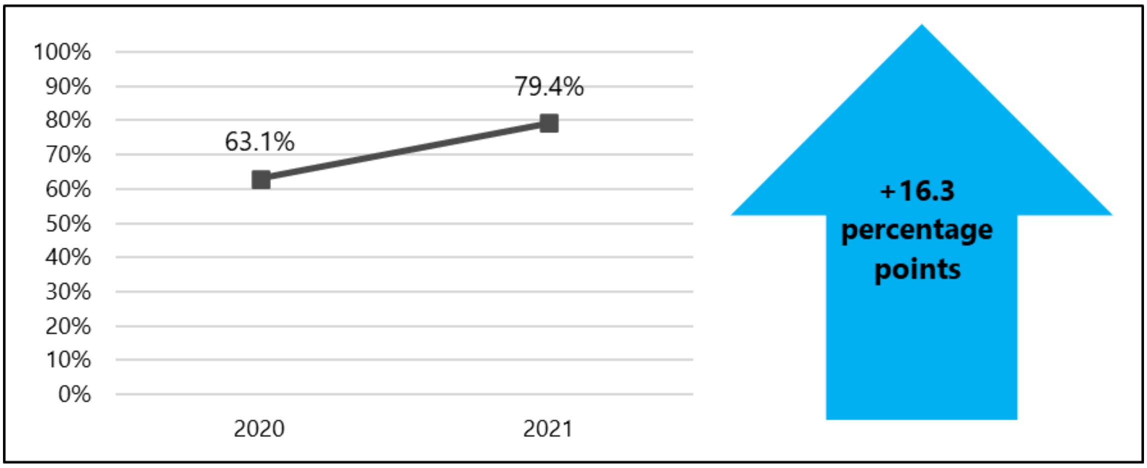
UNDER 2's PLACES: 2021 RESPONDENTS WITH EITHER AN INCREASE IN DEMAND OR NO CHANGE IN DEMAND



Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

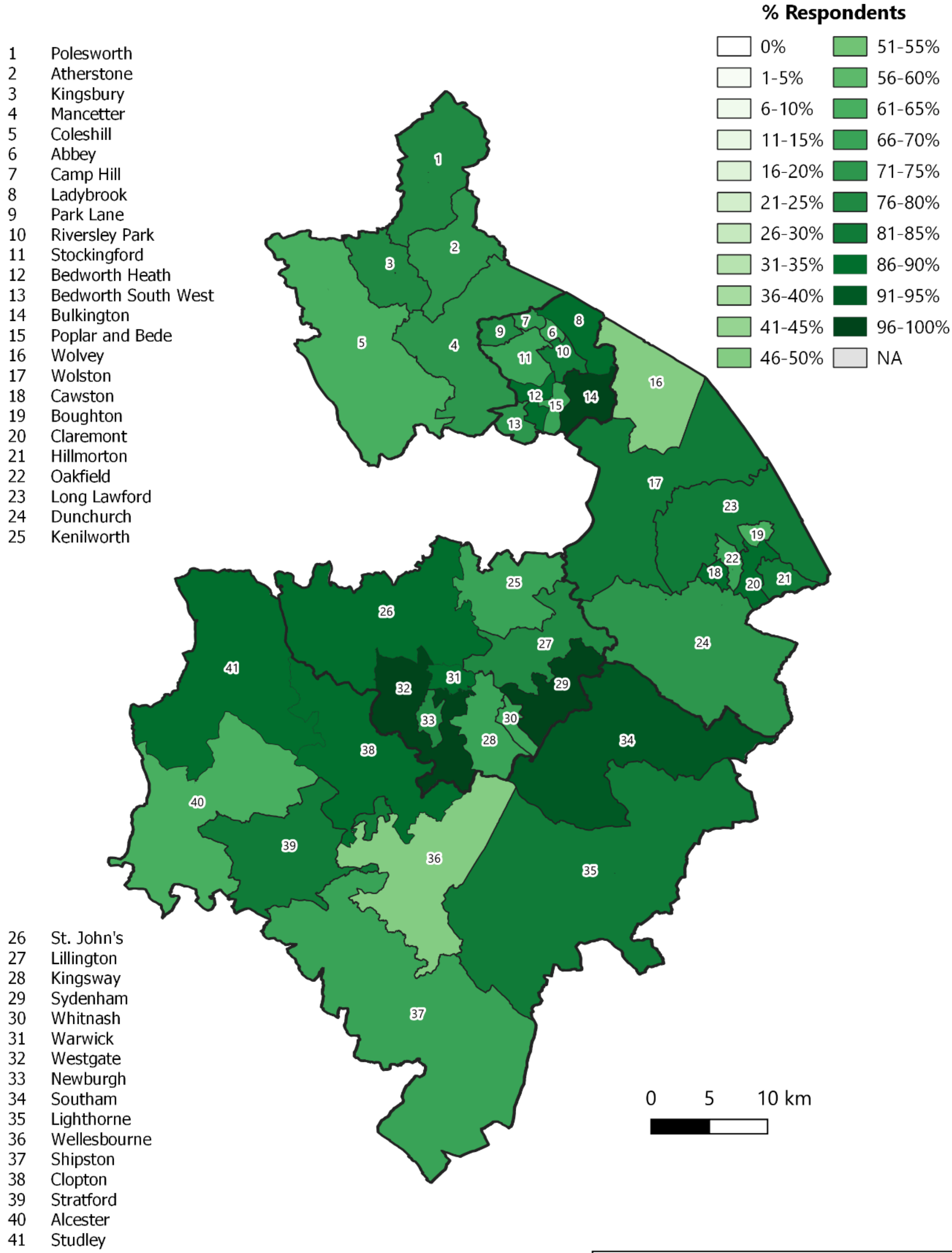
Demand for 2 year old paid places

79.4% of respondents have seen either an increase in demand for 2 year old paid places or no change in demand. *In 2020, it was 63.1% of respondents.*



SERVICE TYPE	% OF 2021 RESPONDENTS WITH INCREASE OR NO CHANGE IN DEMAND	% OF 2020 RESPONDENTS WITH INCREASE OR NO CHANGE IN DEMAND	PERCENTAGE POINTS CHANGE
Nursery Units of Independent Schools	**100.0%**	66.6%	+33.4
Academy Nursery Class	**100.0%**	NA	
Day Nursery	**85.7%**	66.0%	+19.7
Pre-School	**82.3%**	56.6%	+25.7
Childminder(s)	**75.0%**	63.2%	+11.8
Private Nursery School	**66.6%**	33.3%	+33.3
Maintained Nursery Class/School	**58.4%**	77.7%	-19.3
Out of School Care	**0.0%**	0.0%	

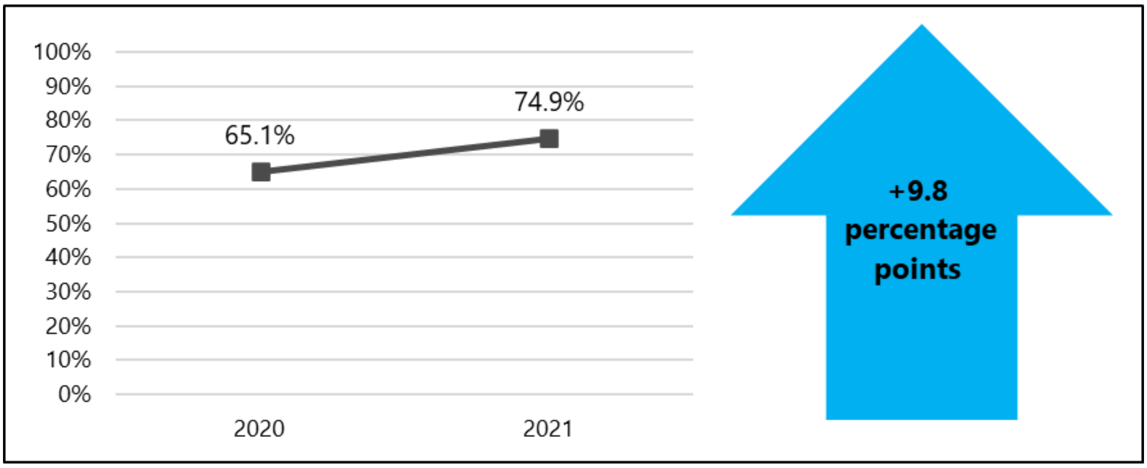
2 YEAR OLD PAID PLACES: 2021 RESPONDENTS WITH EITHER AN INCREASE IN DEMAND OR NO CHANGE IN DEMAND



Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

Demand for funded 2 year old places

74.9% of applicable respondents have seen either an increase in demand for funded 2 year old places or no change in demand. *In 2020, it was 65.1% of respondents.*



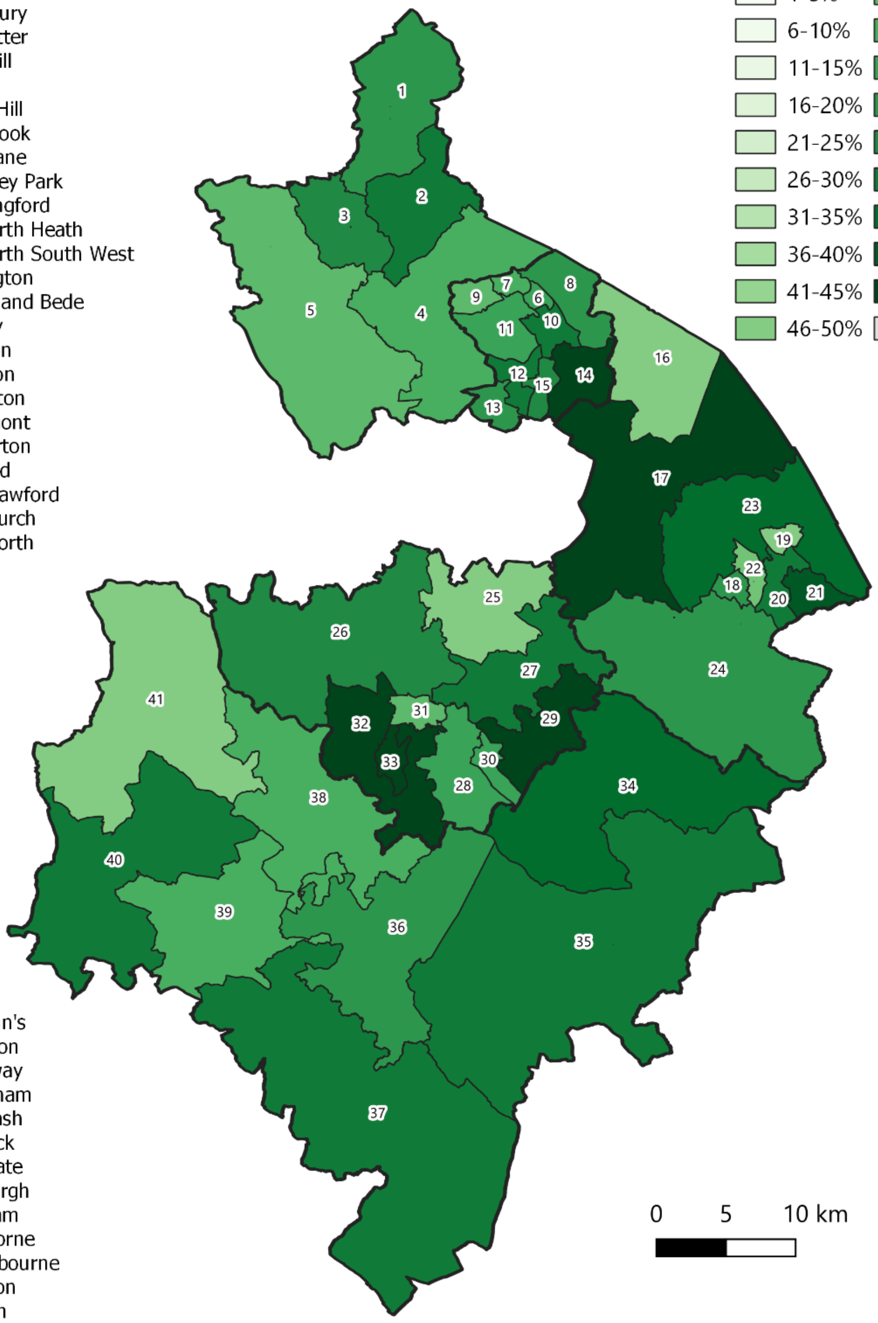
SERVICE TYPE	% OF 2021 RESPONDENTS WITH INCREASE OR NO CHANGE IN DEMAND	% OF 2020 RESPONDENTS WITH INCREASE OR NO CHANGE IN DEMAND	PERCENTAGE POINTS CHANGE
Academy Nursery Class	**100.0%**	NA	NA
Nursery Units of Independent Schools	**100.0%**	0.0%	+100.0
Pre-School	**80.4%**	76.0%	+4.4
Day Nursery	**78.4%**	70.3%	+8.1
Childminder(s)	**71.0%**	56.2%	+14.8
Maintained Nursery Class/School	**69.2%**	90.9%	-21.7
Private Nursery School	**33.3%**	33.3%	
Out of School Care	**0.0%**	0.0%	

FUNDED 2 YEAR OLD PLACES: 2021 RESPONDENTS WITH EITHER AN INCREASE IN DEMAND OR NO CHANGE IN DEMAND

% Respondents

0%	51-55%
1-5%	56-60%
6-10%	61-65%
11-15%	66-70%
16-20%	71-75%
21-25%	76-80%
26-30%	81-85%
31-35%	86-90%
36-40%	91-95%
41-45%	96-100%
46-50%	NA

1 Polesworth
2 Atherstone
3 Kingsbury
4 Mancetter
5 Coleshill
6 Abbey
7 Camp Hill
8 Ladybrook
9 Park Lane
10 Riversley Park
11 Stockingford
12 Bedworth Heath
13 Bedworth South West
14 Bulkington
15 Poplar and Bede
16 Wolvey
17 Wolston
18 Cawston
19 Boughton
20 Claremont
21 Hillmorton
22 Oakfield
23 Long Lawford
24 Dunchurch
25 Kenilworth



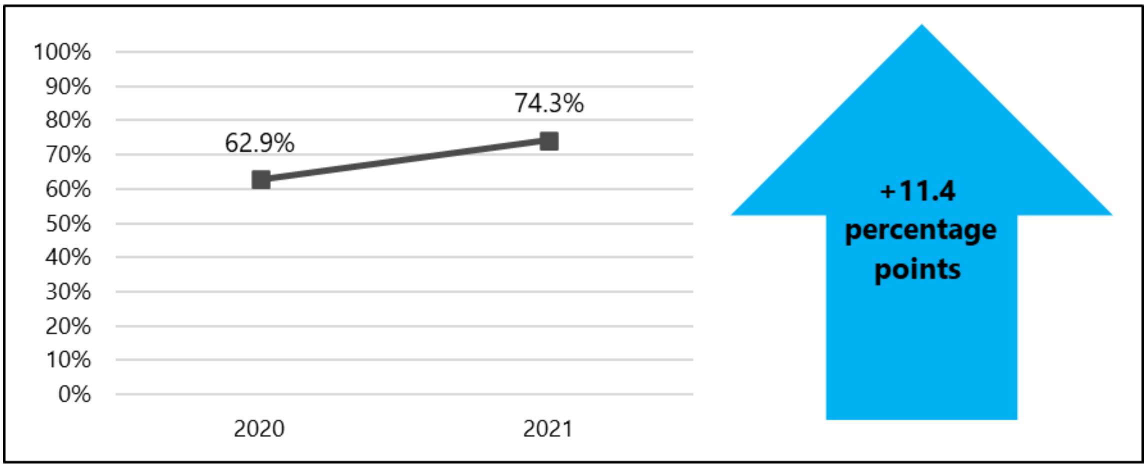
26 St. John's
27 Lillington
28 Kingsway
29 Sydenham
30 Whitnash
31 Warwick
32 Westgate
33 Newburgh
34 Southam
35 Lighthorne
36 Wellesbourne
37 Shipston
38 Clopton
39 Stratford
40 Alcester
41 Studley

0 5 10 km

Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

Demand for funded 3 & 4 year old universal entitlement places (15 hours)

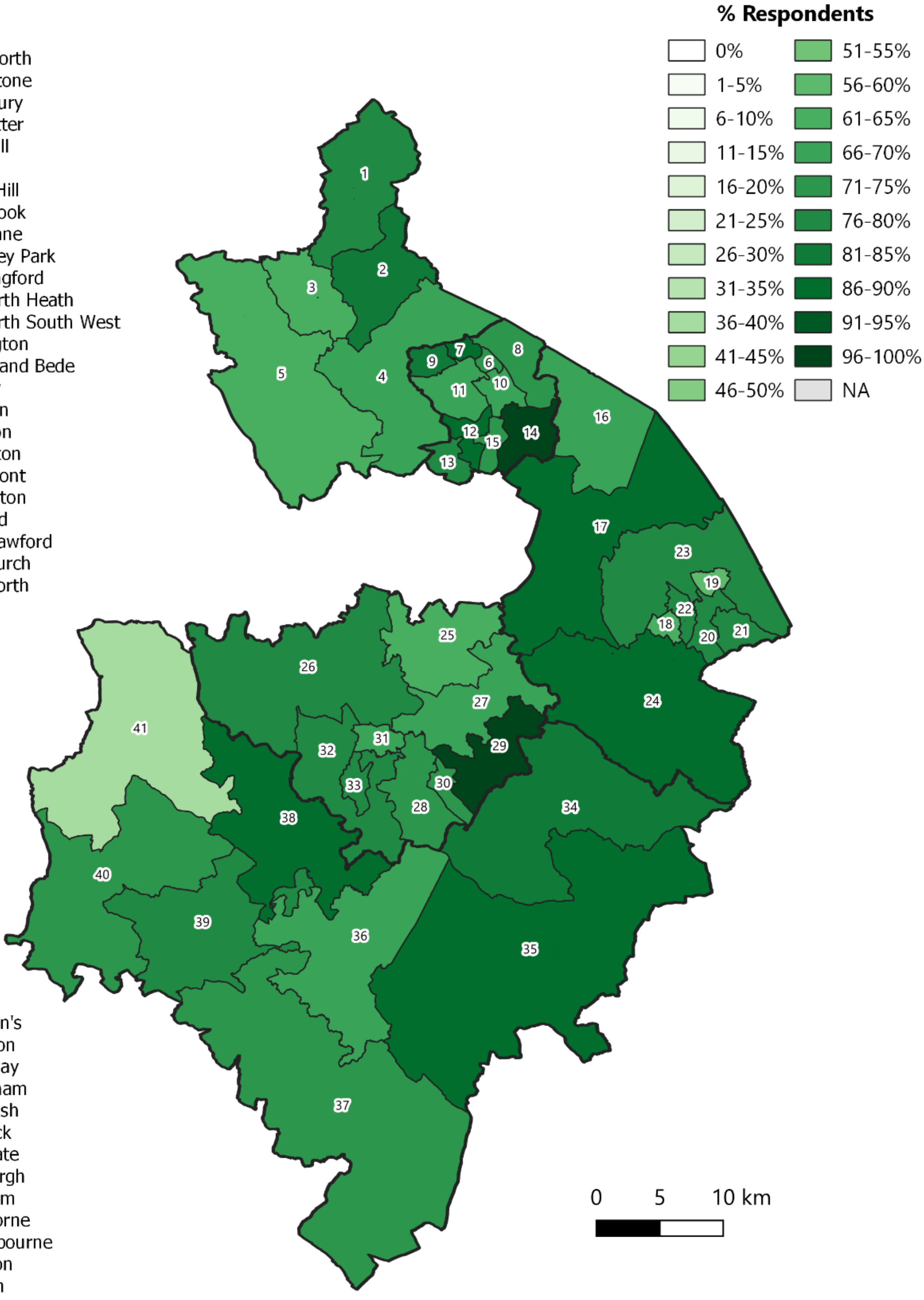
74.3% of applicable respondents have seen either an increase in demand for funded 3 & 4 year old universal entitlement places or no change in demand. *In 2020, it was 62.9% of respondents.*



SERVICE TYPE	% OF 2021 RESPONDENTS WITH INCREASE OR NO CHANGE IN DEMAND	% OF 2020 RESPONDENTS WITH INCREASE OR NO CHANGE IN DEMAND	PERCENTAGE POINTS CHANGE
Nursery Units of Independent Schools	**100.0%**	75.0%	+25.0
Private Nursery School	**100.0%**	33.3%	+66.7
Day Nursery	**82.9%**	65.1%	+17.8
Pre-School	**72.6%**	58.9%	+13.7
Childminder(s)	**69.3%**	62.5%	+6.8
Maintained Nursery Class/School	**66.6%**	66.7%	-0.1
Academy Nursery Class	**55.6%**	61.6%	-6.0
Out of School Care	**50.0%**	50.0%	

FUNDED 3 & 4 YEAR OLD UNIVERSAL ENTITLEMENT PLACES: 2021 RESPONDENTS WITH EITHER AN INCREASE IN DEMAND OR NO CHANGE IN DEMAND

1 Polesworth
2 Atherstone
3 Kingsbury
4 Mancetter
5 Coleshill
6 Abbey
7 Camp Hill
8 Ladybrook
9 Park Lane
10 Riversley Park
11 Stockingford
12 Bedworth Heath
13 Bedworth South West
14 Bulkington
15 Poplar and Bede
16 Wolvey
17 Wolston
18 Cawston
19 Boughton
20 Claremont
21 Hillmorton
22 Oakfield
23 Long Lawford
24 Dunchurch
25 Kenilworth

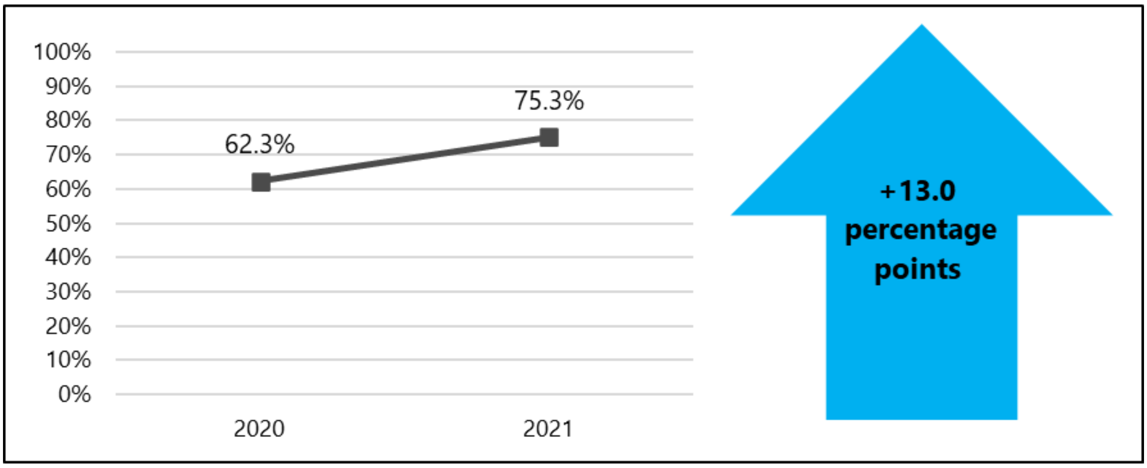


26 St. John's
27 Lillington
28 Kingsway
29 Sydenham
30 Whitnash
31 Warwick
32 Westgate
33 Newburgh
34 Southam
35 Lighthorne
36 Wellesbourne
37 Shipston
38 Clopton
39 Stratford
40 Alcester
41 Studley

Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

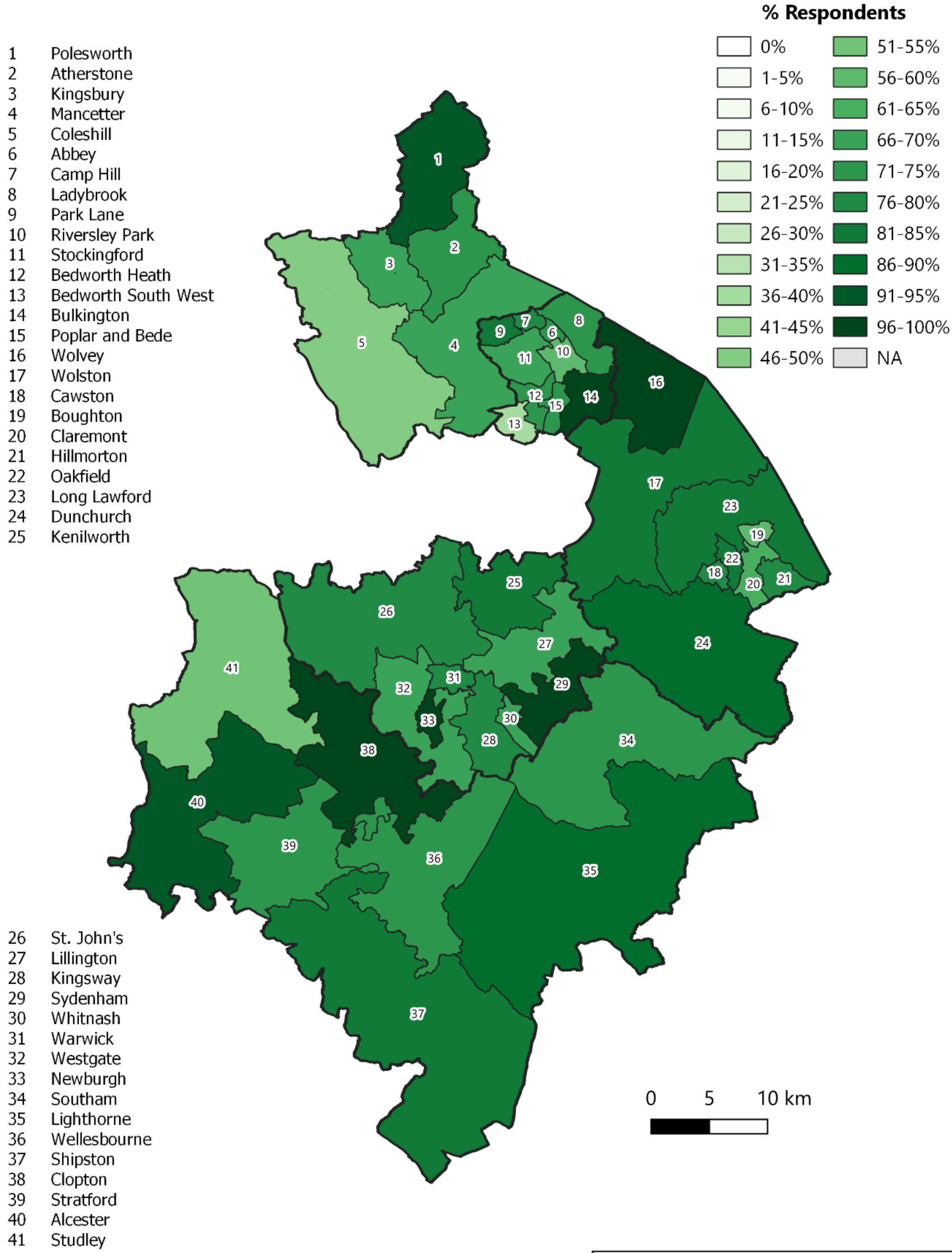
Demand for funded 3 & 4 year old extended entitlement places (30 hours)

75.3% of applicable respondents have seen either an increase in demand for funded 3 & 4 year old extended entitlement places or no change in demand. *In 2020, it was 62.3% of respondents.*



SERVICE TYPE	% OF 2021 RESPONDENTS WITH INCREASE OR NO CHANGE IN DEMAND	% OF 2020 RESPONDENTS WITH INCREASE OR NO CHANGE IN DEMAND	PERCENTAGE POINTS CHANGE
Nursery Units of Independent Schools	**100.0%**	100.0%	
Private Nursery School	**100.0%**	33.3%	+66.7
Day Nursery	**85.2%**	66.5%	+18.7
Pre-School	**75.0%**	58.2%	+16.8
Childminder(s)	**69.4%**	59.2%	+10.2
Maintained Nursery Class/School	**65.7%**	71.5%	-5.8
Academy Nursery Class	**50.0%**	66.7%	-16.7
Out of School Care	**0.0%**	50.0%	-50.0

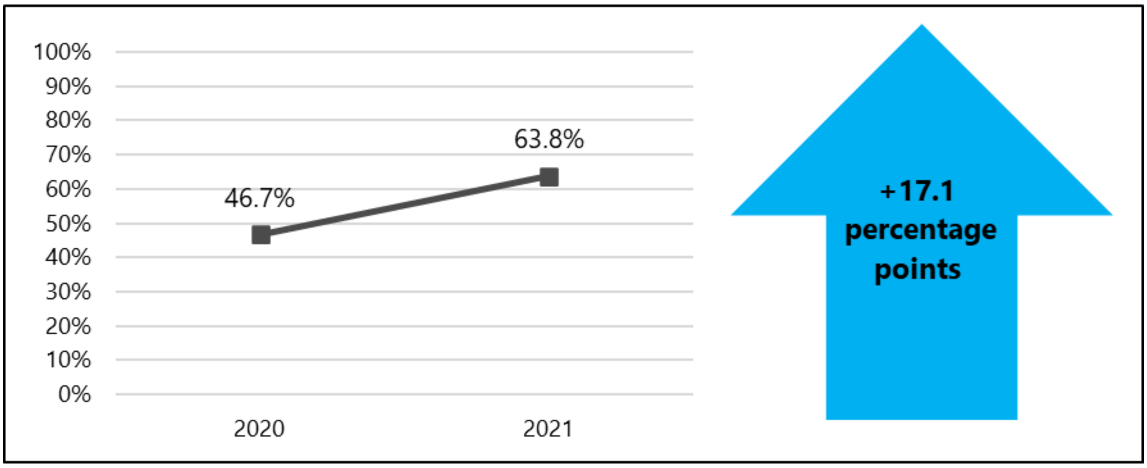
FUNDED 3 & 4 YEAR OLD EXTENDED ENTITLEMENT PLACES (30 HOURS): 2021 RESPONDENTS WITH EITHER AN INCREASE IN DEMAND OR NO CHANGE IN DEMAND



Geography displayed:
LOWER EARLY YEARS PLANNING AREAS

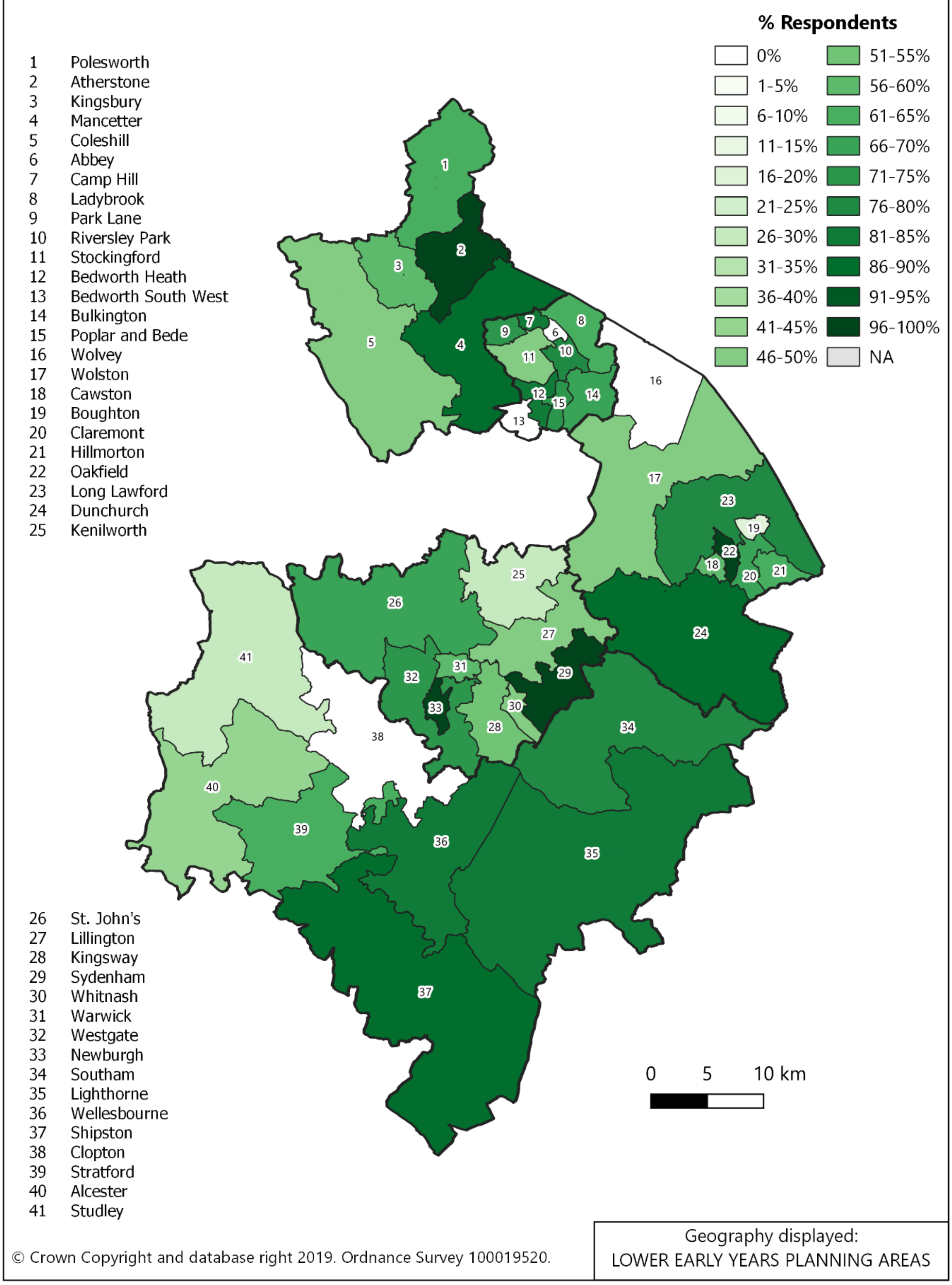
Demand for school-aged places - wraparound provision

63.8% of respondents have seen either an increase in demand for school-aged places – wraparound provision or no change in demand. *In 2020, it was 46.7% of respondents.*



SERVICE TYPE	% OF 2021 RESPONDENTS WITH INCREASE OR NO CHANGE IN DEMAND	% OF 2020 RESPONDENTS WITH INCREASE OR NO CHANGE IN DEMAND	PERCENTAGE POINTS CHANGE
Nursery Units of Independent Schools	**100.0%**	66.7%	+33.3
Private Nursery School	**100.0%**	0.0%	+100.0
Childminder(s)	**66.0%**	51.2%	+14.8
Day Nursery	**65.1%**	30.6%	+34.5
Academy Nursery Class	**60.0%**	75.0%	-15.0
Maintained Nursery Class/School	**52.6%**	66.7%	-14.1
Out of School Care	**40.0%**	20.0%	+20.0

SCHOOL-AGED PLACES - WRAPAROUND PROVISION: 2021 RESPONDENTS WITH EITHER AN INCREASE IN DEMAND OR NO CHANGE IN DEMAND



Evaluation

Overall, as with the Autumn Term 2020 health check, the information supplied indicates that the market force remains fairly stable at the current time, however robust monitoring must continue as we now know the impact of sector business pressures alongside the ongoing pressures of the pandemic continues to evolve. At the current time a long term view of place sufficiency and sustainability alongside demand is not possible to predict and Warwickshire will implement a full Childcare Sufficiency Assessment to be published in 2022 to support ongoing monitoring.