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To

THE DEPARTMENT OF HEALTH

From

Quality Health Limited

In partnership with

Sambrook Research

**The Nursery Milk Scheme
Public Consultation and Survey of Childcare
Providers
Analysis Report**

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IMPORTANT NOTICE TO ALL READERS

This report has been produced by Quality Health and Sambrook Research to guide the Department of Health's thinking, on the future of the Nursery Milk Scheme.

The findings in the report contain a detailed analysis of all the responses to the childcare settings¹ survey and consultation.

Our work has identified certain anomalies within the data, which needed to be clearly understood and addressed, including a few elements of both the survey and the consultation where we believe the findings are unclear and / or unsafe. We believe this is because some of the respondents may have misunderstood or misinterpreted what has been asked. We have tried where possible to remedy this by examining the data in various ways in order to identify reliable findings, and have endeavoured where possible to make this clear in the body of the text where we have particular concerns.

However, where it was not possible to remedy our concerns, the findings have been deemed unsafe and are removed to the appendices. We have kept them in the report because we feel that despite the quantitative findings being unsafe, they do still provide some valuable 'qualitative' insights.

In addition, where there are small sample sizes – or a small number of responses of a particular type – it is not necessarily statistically significant to assume that the same responses cover the entire population. We have made this clear throughout the report in red text.

Finally, we wish to make clear that our remit is to review, analyse and interpret all the views submitted to the survey and consultation and in particular to highlight the main concerns and issues that have been raised about each option by all stakeholders that participated in the survey and consultation. In addition, we have been commissioned to prepare a detailed report (together with a databank cross-referencing key information submitted in the survey and the consultation) that should contain clear, unambiguous information that the Department of Health can use the findings in order to decide the future policy for the Nursery Milk Scheme.

It is not in our remit to conduct an impact assessment of the options in the consultation, nor to evaluate the viability of any of the options. Although we have highlighted all issues identified in the analysis that we believe the Department needs to take into account when conducting its impact

¹ Please note that the terms "childcare provider" and "childcare setting" are used interchangeably in this report.

assessment of the final option (s) and developing the scheme specifications for the future Nursery Milk Scheme.

EXECUTIVE SUMMARY

Nursery Milk Survey (2,258 childcare providers) – key findings

1. 88% of childcare settings in the survey have milk delivered to their premises.
2. 95% of childcare setting survey respondents purchase whole, semi-skimmed milk or both, 11% buy organic / special milks. 28% of settings purchase milk or have milk delivered in 1/3 pint (or similar sized) cartons, 80% buy milk in bulk containers (ranging from 1 pint to 6 litres).
3. 76% of survey respondents buy milk or have milk supplied in plastic bottles, 31% in tetra pack cartons - 1/3 pint and larger sized bulk containers use both material types.
4. 86% of childcare setting respondents serve milk by pouring it into feeding cups or bottles, 29% serve milk in single serve cartons sometimes alongside poured servings.
5. Most childcare setting respondents indicated high levels of satisfaction with the current Nursery Milk Scheme, only 10% of comments expressing dissatisfaction.
6. The average price reported by respondents (across all container sizes) was 71.6p per pint. 43% of setting respondents pay between 20p and 79p per pint compared to 54% that pay 90-99p (mainly 90p) per pint. Interestingly, over 400 childcare settings say that they *buy* milk or have milk supplied in bulk container sizes (1 pint to 6 litres), and serve this milk in cups / feeding bottles, but *quote prices* in 1/3 pint units, and charge the NMS 90p or more per pint equivalent.

Nursery Milk Scheme Consultation (3,350 organisations) – key findings

7. 76% of consultation respondents thought paying 92p for a pint of milk was not a good use of public money, compared to 24% that thought it was. 24% of respondents that gave views on what they thought would be a reasonable price for the taxpayer to pay said less than 50p, 35% said 50-59p and 41% said 60p or higher, although the authors have concerns about the robustness of this data (see report for details).
8. Option 1 (do nothing) - although respondents were not asked to rank this option, comments throughout the consultation clearly indicate a high level of satisfaction with the current scheme with many respondents (from all types of organisation) saying (unprompted) “keep the current scheme / it works well – why change / do not change”.
9. Option 2 (price cap) – of 1,652 that replied, 60% thought introducing a price cap would disadvantage specific population groups, 34% said no, 6% were unsure.
10. Option 3 (e-voucher) – of 2,015 that replied, 66% thought introducing an e-voucher would disadvantage specific population groups, 28% said no, 6% were unsure.
11. Option 4 (direct supply) – of 1,756 that replied, 46% thought the introducing direct supply would disadvantage specific population groups, 51% said no, 3% were unsure.

12. 53% of respondents ranked option 4 (direct supply) as their 1st preference compared to 39% for option 2 (price cap) and 16% for option 3 (e-voucher).

Nursery Milk Scheme future policy - key conclusions

Option 1 – No change

There is an extremely high level of satisfaction among respondents with the current scheme and many (all organisation types) would like it to continue unchanged. However, many consultation respondents also appreciate that the Government has an obligation to ensure that public money delivers best value for money, and an alternative system would be acceptable provided it continues to deliver the same level of flexible choice in terms of product, purchase, administration and reliable delivery (where required) and can also make significant cost savings.

Option 2 – Introduce a price cap

Support among respondents for a price cap is totally dependent of the level at which the cap is set. Respondents in the consultation were asked “In what range should the maximum price be set?”. There was clearly confusion amongst many respondents whether the price cap applied to milk purchased in a retail outlet or delivered milk, which size of container the price applied to (in particular 1/3 pint (or similar size) single serve containers) and whether the cost of a 3rd party claiming for the administration was included in the price. A wide range of prices (from less than 25p to over 70p per pint) were suggested, but unfortunately the data has limited value and is deemed not fit for publication. Qualitatively, some respondents prefer a high cap level to ensure there is minimal or no threat to the total flexibility available under the current scheme. Others were more amenable to a lower price cap. However, the consultation also clearly shows that the lower the price cap is set, the greater the risk that childcare settings and milk providers would opt out of the scheme, resulting in significant numbers of children under 5 no longer receiving free milk. To avoid serious resistance or drop out from the scheme, a range of different caps or exemptions (to apply to different circumstances) may need to be introduced. If adopted, responses to the survey and consultation suggest that the specification needs to address the following critical points:

- Clear definition of the packaging type / size and milk types that are included
- Clarification that the cost of purchased or delivered milk can be claimed
- Clarification that the cost of 3rd party claim administration can be included
- Claims would only be settled for the actual cost incurred with supporting evidence
- The cap needs to be reviewed regularly to align it with the price of milk
- A regular audit should be introduced to mitigate scheme abuse / over claiming
- Clarification regarding claims above the cap where exceptional circumstances apply, in particular access to retail outlets (especially remote / rural areas) and lack of transport

Option 3 – Introduce payments by e-voucher

Respondents consistently see this as the weakest option with the lowest level of preference and the highest level of potential risks to population groups. There is particular concern that the technology would not be easily understood / accessible

by childcare settings or readily available within sufficient retail and milk delivery outlets for settings to continue get milk without encountering significant problems. This is clearly a very weak option, especially compared to the other three.

Option 4 – Direct delivery

This is potentially the strongest option with 53% of the consultation sample ranking it as their 1st preference. Furthermore, 88% of childcare settings in the survey currently have their milk delivered to their premises, and the proportion of all Nursery Milk Scheme users having milk delivered is almost certainly even higher.

However, many respondents expressed reservations about this scheme, in particular the ability of a single organisation (or several organisations) to administer a scheme nationally and ensure reliable delivery of milk to all childcare settings (regardless of location, volume of milk used or type / size of packaging required). There was also significant concern that many childcare settings that find it more practical (and economical) to buy milk (either low cost from supermarkets or at higher costs from local shops, depending on circumstances) would not find it viable to participate in a direct delivery scheme. There was also some concern (albeit the frequency of mentions was very low, ranging from 1-5%) about the risk that small local dairies / milk deliverers / milkmen would be excluded from participating and prices to farmers would be extremely low. If these concerns are not adequately addressed, there is significant risk that many childcare providers would opt out of the scheme, resulting in significant numbers of children under 5 no longer receiving free milk. However, the consultation identified many suggestions from respondents how to mitigate these concerns, and thus improve the specification of the scheme and its ability to achieve its stated goals. If adopted, responses to the survey and consultation suggest that the specification would need to address the following critical points:

- Clear definition of the packaging size and milk types that are included, and to maximise the acceptability of the scheme it should include the following:
 - *Whole milk and skimmed milk, special milks required on medical or religious grounds*
 - *Any packaging type or pack size*
- Strong contractual delivery performance criteria that the successful contractor(s) must guarantee delivery to all childcare settings in England, Scotland and Wales, regardless of location, size of milk container required, volume of milk order, delivery frequency and in many cases a mutually acceptable time of delivery.
 - *Delivered milk should only be purchased via the nominated scheme contractor(s)*
 - *The consultation indicates that engagement of local dairies and milk delivery providers / milkmen would almost certainly be a practical necessity*
 - *Consider including contractual clauses to ensure a minimum price to farmers is achieved*
- Clarification that only the scheme's nominated organisation would handle all administration on behalf of childcare settings having milk delivered under the scheme
- If necessary, consider the inclusion of an exemption clause for childcare settings that do not want milk delivered (for practical reasons) but want to purchase the milk themselves and claim reimbursement from the authorised reimbursement organisation
 - *Claims would only be settled for the actual cost incurred with supporting evidence*
- An accurate evaluation of the scheme set-up costs
- A regular audit should be introduced to mitigate any scheme abuse. In particular:
 - *Any milk purchased at significantly high prices*
 - *Checks that the numbers claimed (either delivered or purchased) are correct*

Overall conclusions

Some questions in the survey and consultation failed to deliver reliable, robust data, but the majority of the questions (quantitative and extensive qualitative comments provided by respondents) did produce sound findings that were extremely informative. In addition, it should be noted that it is unclear if certain childcare provider sectors (in particular local authority pre-school settings and local authority nurseries) are adequately represented in the samples in relation to the volume of milk they use as part of the Nursery Milk Scheme. However, we believe the survey and consultation delivered more than sufficient feedback to guide policy makers how best to develop the Nursery Milk Scheme in the future.

Conclusion 1 – consultation respondents felt that both option 2 (price cap) and option 4 (direct delivery) should be considered as possible solutions.

Conclusion 2 - consultation respondents generally considered option 3 (e-voucher card) to be a weak option and should not be pursued further.

It is not possible for the authors of this report to recommend which option to use, as there are two options that could potentially be suitable and both appear to be able to deliver cost savings. It is the Department of Health's role to conduct the full impact assessment on both options. The results of which, together with the findings in this report, should be used to decide which option best meets the overall policy objective, which is: "To modernise the scheme, contain costs and improve value for money, while ensuring that all children under five in childcare settings for at least two hours a day continue to receive free milk".

BACKGROUND, OBJECTIVES AND METHODOLOGY

Background

The Nursery Milk Scheme reimburses childcare providers for a daily drink of milk (a third of a pint) supplied to all eligible children under five in their care who attend a childcare setting for more than two hours a day. The Nursery Milk Scheme has been running largely unchanged, since the 1940s. The Scheme currently funds free milk for around 1.5 million children under five years old - in 55,000 childcare settings throughout Great Britain. The Prime Minister has made a public, national commitment that the scheme will continue, and the Secretary of State has statutory obligations to provide Nursery Milk.

The scheme is very popular amongst childcare providers and parents of children under five. However, there is concern that the total cost of the scheme has risen strongly in recent years, from £27m in 2007 / 08 to £58.6m in 2011 / 12, and this trend looks likely to continue with costs potentially rising to £80m by 2015 / 16.

The Department of Health (DH) launched a GB wide consultation and survey to explore different options for reforming the operation of the scheme. The consultation looks at where the scheme can be run more efficiently, as well as improving its value for money, while ensuring that no parent or child is disadvantaged. The consultation was launched on the 18th of June and closed on the 23rd of October 2012. The survey was launched on the 18th of June and closed on the 30th of September 2012. The goal was to seek views on ways to modernise the Nursery Milk Scheme and improve value for money

Objectives

A total of 5,608 responses have been received: 3,350 for the consultation and 2,258 for the survey. Quality Health in partnership with Sambrook Research was commissioned to provide a comprehensive and robust analysis of the responses, the results of which will inform further detailed development of the options. Any decisions on the future operation of the Nursery Milk Scheme will be taken after full consideration is given to these responses.

Methodology

The responses (comprising a mix of quantitative measures and qualitative comments) received via the on-line consultation platform (Citizen Space) were downloaded into two separate Excel spread sheets for analysis.

The quantitative responses were analysed by a team of experienced researchers and statisticians, and the analysis has been assiduously checked and verified. Every single qualitative comment was read by an experienced research consultant, and coded, where relevant, so that groups of similar ideas could be identified and analysed. In addition, 210 hand written and email responses that had been sent to the Department of Health were carefully read, and the feedback was entered onto the consultation database, where appropriate. Once all the qualitative comments had been coded, they (together with the quantitative data)

were analysed and an interim report was prepared. The qualitative comments were then individually re-checked and the codes corrected, where required.

The data was then re-analysed and the findings in the report updated to take account of the corrected codes for the qualitative comments. Extensive cross tabulations of the quantitative and qualitative findings for both the childcare setting survey and the consultation were prepared, and analysed to identify any significant trends, which were then presented in the main report. The cross tabulations can be found in appendices 3 and 4 of this report.

In addition, it should be noted that several responses were very extensive in nature and went beyond the scope of the consultation questionnaire. These very detailed comments were extremely informative and helpful in enabling the research team to obtain a better understanding of the complexity of the Nursery Milk Scheme and the complex dynamics within the supply chain as well as the 55,000 childcare settings that receive support from the scheme and provide milk to children under 5. A summary of these responses has been prepared in a special chapter, highlighting the additional, specific points they made, but not repeating the points that address specific questions that have already been entered into the consultation database.

A note about presentation of the qualitative comments

The number of qualitative comments ranged from less than 100 for some questions and up to 1,650 for other questions. When analysing comments, we have sought to identify the most frequently mentioned views (commonly shared by different respondents) and these are all presented in the report. Where the frequency of several people holding the same view is quite low (in most cases only 2 or 3 people) their views have been counted within the 'miscellaneous' comments, which is predominantly a collation of all the single, one-off comments.

However, be reassured that any low frequency comments considered to be of particular importance or relevance to enhancing the understanding or impact of the questions within the survey or consultation, are highlighted in this report.

A word of thanks for your contributions

The research team would like to thank each and every one of the 5,608 people and organisations that invested valuable time to respond to the survey and consultation. Please be reassured that the research team has read every single comment you wrote (the authors of this report read over 75% of them) and we have endeavoured to present your views, concerns and suggestions regarding the future of the Nursery Milk Scheme in an unbiased and professional manner.

A note about the findings

The Nursery Milk Scheme is an extremely complex market. For example, it involves a wide range of different types of milk used, different types of packaging material and a range of different pack sizes. It involves product being purchased from local shops to major supermarket chains or being delivered. Order volume can vary enormously from a couple of pints a week to 200 pints a day! Many

settings order the milk themselves, but many school and nurseries have their milk provided by Local Authority contracts. Some settings handle the Nursery milk claims themselves, whilst a growing majority find it much easier to have this done for them by a 3rd party agent. Furthermore, the milk is provided to a very wide mix of different childcare settings, ranging from a childminder caring for only 1 child a couple of times a week, to a large nursery registered to care for up to 200+ children per session with several sessions each day, 5 or more days a week, from small charity play groups to pre-school settings and childcare providers.

The consultation also involved responses from a very wide range of other respondents, including local authorities, healthcare specialists, dairy farmers, milkmen, small and large dairies, local retailers, 3rd party agents, national supermarket chains, members of the public / many parents of children under 5, trade organisations, crèche managers, and many more.

The childcare setting survey and the consultation adopted an on-line survey approach. Most of the questions yielded clear and extensive feedback. However survey questions Q10 / Q13 and consultation questions Q1.1 / Q2 / Q4.5 did not adequately embrace the complexity of the product / buying habits that exist, and many of the responses did not clearly identify which product or purchase mechanism was involved. For survey question Q13 and consultation question 4.5 it was possible to analyse part of the data and produce robust findings. Several consultation respondents felt Q1.1 (a fair price to pay for a pint of milk) was misleading, and does not relate well to the Nursery Milk Scheme where much of the milk is provided in 1/3 single serve containers and delivered to the childcare providers/ setting. These concerns have been highlighted in the report, and responses to consultation Q1.1 have been published, although findings for Q1.1 should for this reason be treated with extreme caution. Unfortunately, responses to survey question Q10 and consultation question Q2.1 did not contain sufficient reliable data, and were not deemed fit for publication, although a summary of the analysis can be found in the appendix (for reference purposes only).

Findings in this report are the views of organisations that responded to the survey and consultation. In some cases (e.g. for childminders), we are confident that that these views are representative of the population as a whole, due to the large sample size; in other cases (e.g. for Local Authorities), the relatively small number of responses means that views expressed may not necessarily be representative of the relevant industry sectors as a whole.

The appendices contain cross-tabulations of both qualitative and quantitative feedback from respondents. Readers should be aware that some cross tabulations contain results based on relatively small samples, and findings based on sub-samples containing less than 50 data entries may not be statistically significant, but they do give some valuable insights for developing policy decisions. Findings from sub-samples with less than 20 respondents have not been included.

A note about the samples

The following table shows how the sample compares to settings nationally and the volume of milk they use in the Nursery Milk Scheme.

Childcare settings

Organisation	Survey (respondents)	Consultation (respondents)	Number of settings currently registered on the NMS†
Local Authority pre-schools	369	+16LA*	Reg. day care providers - 40,600 (mainly independent nurseries, + LA pre-schools /nurseries)
Other pre-school settings		592	
Local authority Nurseries	540	+2LA*	Exempt school - 682 (mainly independent pre-schools)
Other Nurseries		605	
Play groups	16	101 +1LA*	Exempt establishments - 94 (mainly crèches in workplaces or clubs / sports centres, etc.)
Childcare centres ²	7	27 + 8LA*	
Child minders	1,180	431	15,480
Childcare setting (unspecified)	124	866	Not relevant
Total	2,236	2,624 + 27LA*	56,856

† Data provided by MRM (as of 21st February 2013)

The survey did not ask respondents to state if their childcare setting was local authority controlled or not. The consultation did ask respondents if they were part of local authority contracts. The Nursery Milk Reimbursement Unit (NMRU) data base is able to identify childminders that are registered on the nursery milk scheme, but it is not able to identify other categories of childcare setting (as this information is not collected on its registration forms). Childminders is the only category therefore where we can assume the sample is statistically significant and representative of its respective total population user group registered on the Nursery Milk Scheme. It is not possible to state if the other groups of respondents are representative of their respective ‘populations’.

Other key respondent organisations

Although 74 local authorities respondents contributed to the consultation, only 42 can be identified responding on behalf of a local authority organisation (the rest are childcare settings or unknown), and 17 of these were written responses that addressed only a few specific issues in the consultation. It is therefore unlikely that for most questions in the consultation, the sample is not fully representative of all local authorities in England, Scotland and Wales

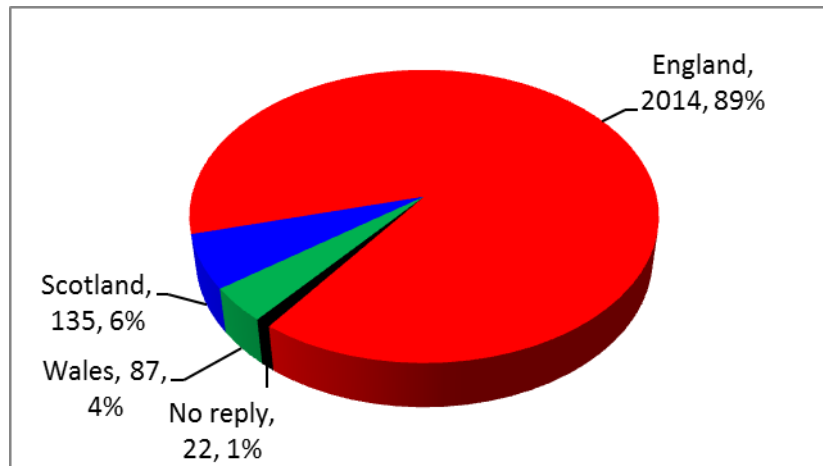
² The term “childcare centres” is used throughout this report to refer to the small group of respondents who used this term to define themselves; or who called themselves “day care centres” or “local authority children’s centres”.

Of the 166 milk providers that responded to the consultation, the majority were dairies and milk deliverers / milkmen. Clearly the sample is not representative of the many thousand milk retailers, and not representative of the many farmers, dairies and milk delivery organisations / milkmen in England, Scotland and Wales.

NURSERY MILK SCHEME SURVEY OF CHILDCARE SETTINGS

SECTION 1 – INFO ABOUT THE CHILDCARE ORGANISATIONS

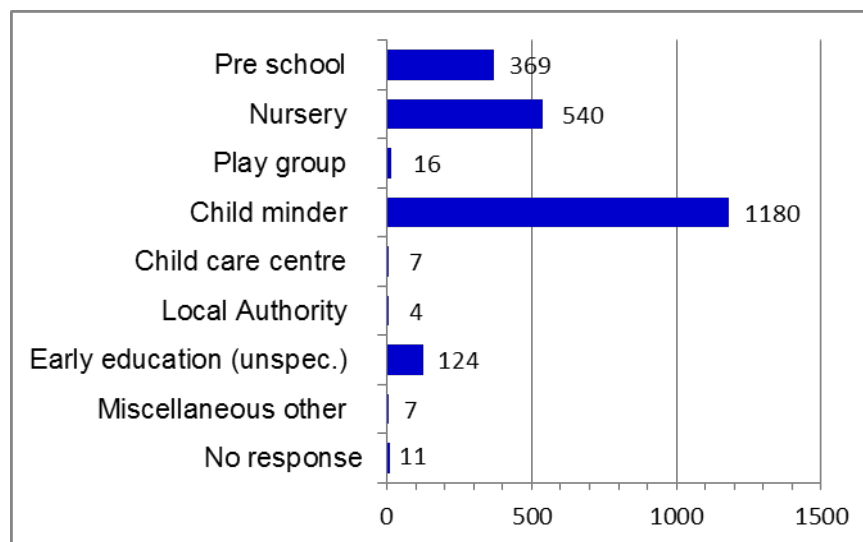
B Country (or countries) that organisations operate in



Source – 2058 survey respondents

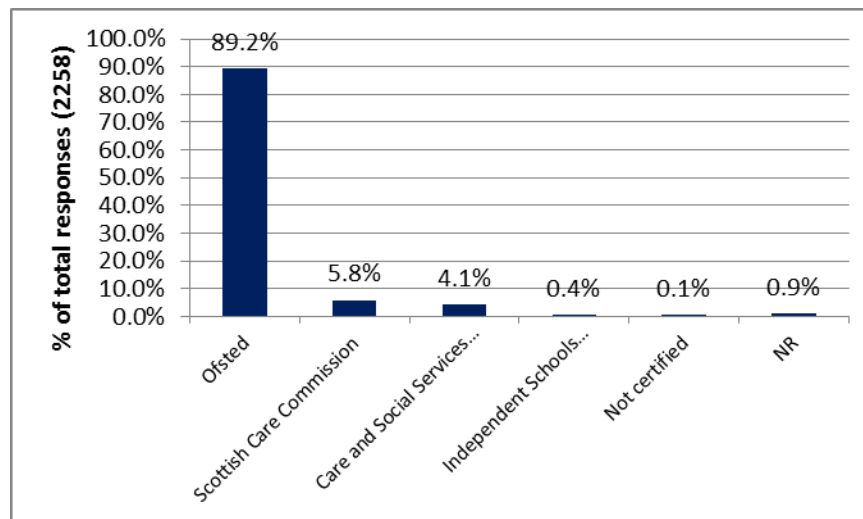
As seen in the pie chart, the majority (89%) of the child settings responding to the survey were located in England, 6% were located in Scotland and 4% in Wales.

C Type of organisation



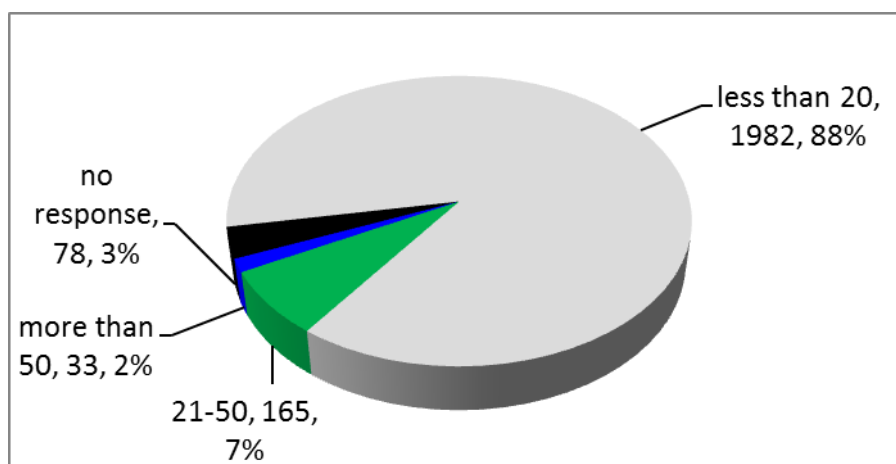
The largest group of organisations participating in the survey was childminders, (53% of the sample), followed by nurseries (24%) and preschools (16%).

D) Certifications



Of the 2258 respondents to the survey, the vast majority (89.2%) are certified with Ofsted, 5.8% certified with the Scottish Care Commission, 4.1% certified with the Care and Social Services Inspectorate Wales, and 0.4% certified with the Independent Schools Inspectorate. A small number of childcare providers were registered with more than one of these.

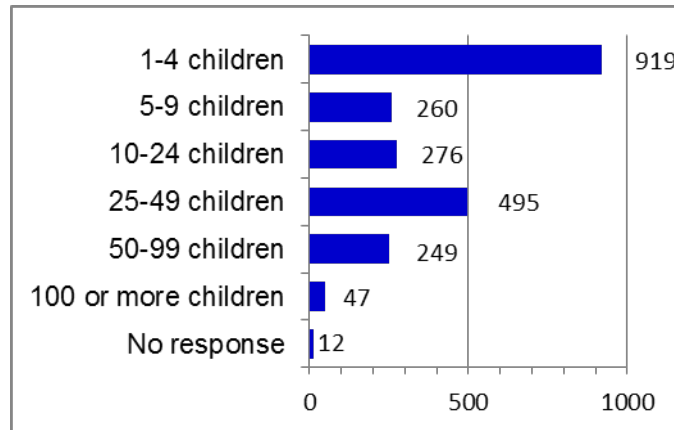
E) Number of staff employed



As seen in the pie chart, 88% of the childcare settings that participated in the survey are micro enterprises employing less than 20 people, 7% employ between 21 and 50 staff, and 33 (2%) organisations employ more than 50 staff.

F) Number of children cared for and when

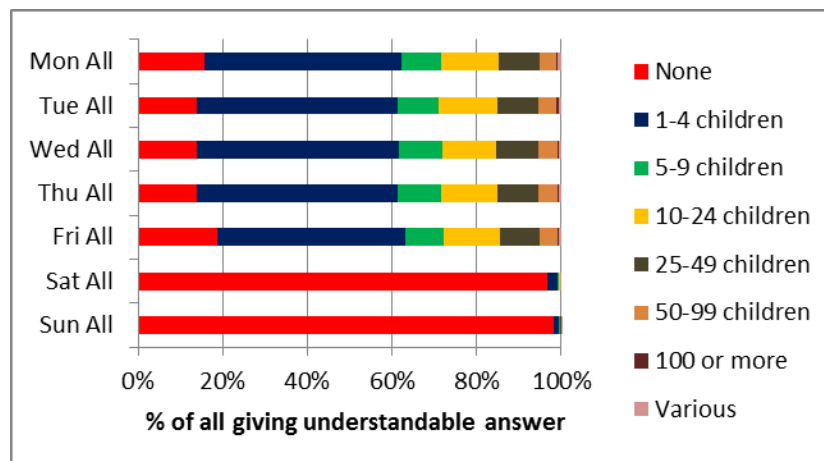
The maximum number of children, aged under five, per day care session, that settings are registered to look after



919 (41%) childcare settings responding to the survey are registered to look after 1-4 children in any day care session, 536 (24%) are registered to look after 5-24 children, 495 (22%) can look after 25-49 children, 249 (11%) can look after 50-99 children and 47 (2%) can look after 100 or more children in any day time session.

How many of these children stay all day?

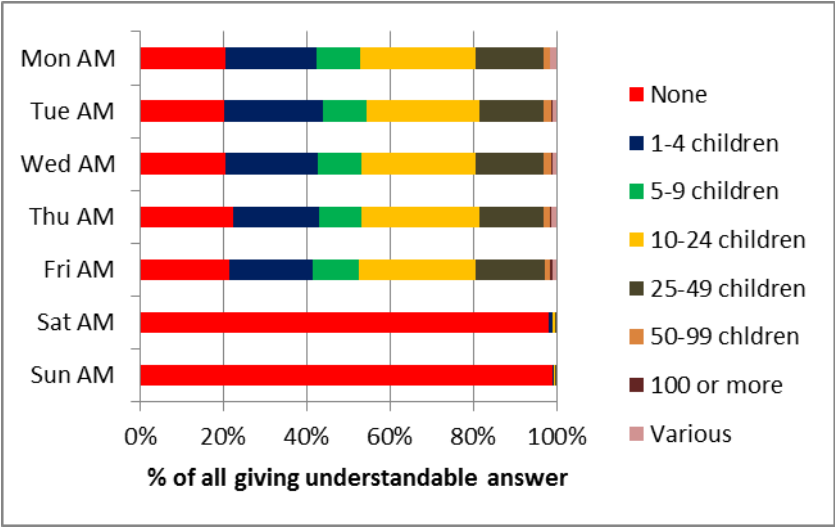
Responses to this question were difficult to analyse, and some were unusable due to the format of the responses. Nevertheless, we were able to analyse data from over 2000 childcare providers.



When answering for the whole day, the most common response was 1-4 children. On an average weekday, 47% of childcare providers are registered for this number, followed by 13% registered for 10-24, 10% for 5-9, 10% for 25-49, 4% for 50-99, and less than 1% registered for 100+. A significant number (15%) reported that they aren't registered for any children for the whole day. The chart above shows how this varies slightly over the course of a week. Most significantly, Friday

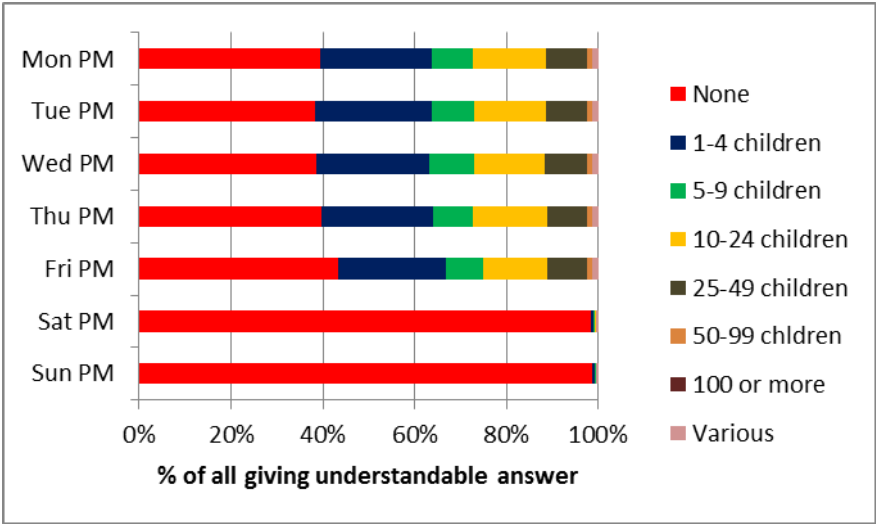
appears to be a less busy day than other weekdays, with 1596 childcare providers saying that they are registered for any of these numbers of children.

Mornings only



The picture for morning only sessions is different. There were 1002 responses of this type. The most common response was 10-24 children (28% on average across the week), followed by 1-4 (22%), 25-49 (16%), 5-9 (11%), 50-99 (2%) and 100+ (less than 1%). 21% of respondents reported that they aren't registered for any children for mornings only. Again, this varies slightly across the week.

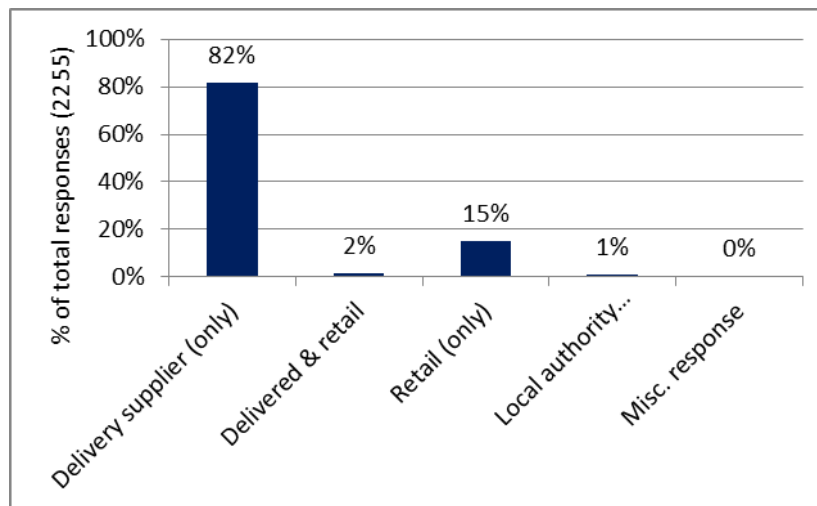
Afternoons only



There appear to be far fewer childcare providers registered for afternoon only sessions (on average across Monday to Friday, 733, compared to 1002 for morning only sessions). The most common response was 1-4 children (24% on average across the week), followed by 10-24 (15%), 25-49 (9%), 5-9 (9%), 50-99 (1%) and 100+ (less than 1%); and 40% who reported that they aren't registered for any children for afternoons only. Again, this varies slightly across the week.

SECTION 2 – HOW THE NURSERY MILK SCHEME IS USED

1) Where do you buy or order the milk that is paid for under the Nursery Milk Scheme?



The answers to this question are complex, and need to be treated with caution, as many respondents buy or order their milk in a variety of different ways.

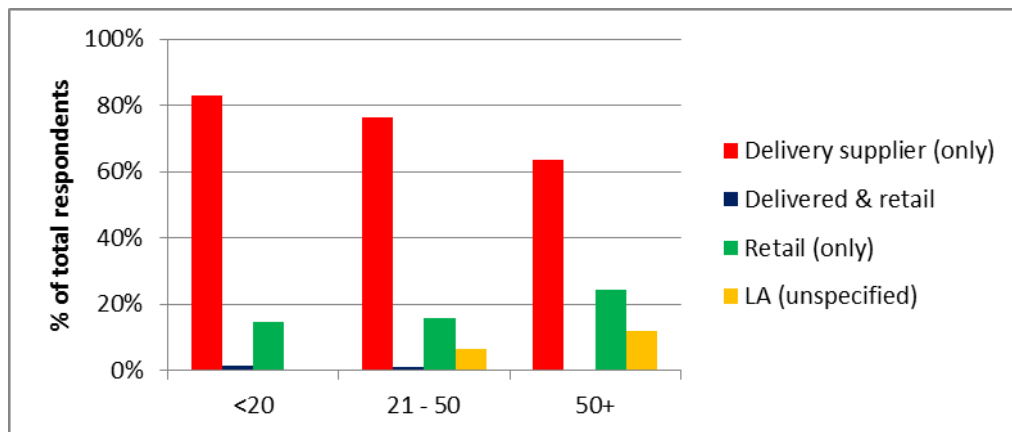
Of the 2258 survey respondents, only 3 didn't answer this question. Of those who did, 1846 (82%) said they buy or order milk through organisations that deliver to them or organise for the milk to be delivered to them. Another 2% have milk delivered, but also sometimes buy from retail. (And – see below – a proportion of those using retail and/or local authorities have their milk delivered by these organisations, rather than buying it directly from them).

340 respondents (15%) report buying their milk only from retail outlets, the vast majority of these through supermarkets, with a smaller number from corner shops. Altogether, 307 (14%) respondents report using supermarkets (however, anecdotal evidence from other questions suggests that some of these “supermarket” responses that come from childcare providers going in to *buy* the milk, while others will involve the supermarket *delivering* the milk (often alongside household orders) to the childcare setting). 117 (5%) of respondents report using corner shops; and very small numbers buy direct from farms (3) or markets (2).

A small number of childcare providers (just over 1%) report buying or ordering their milk through local authorities.

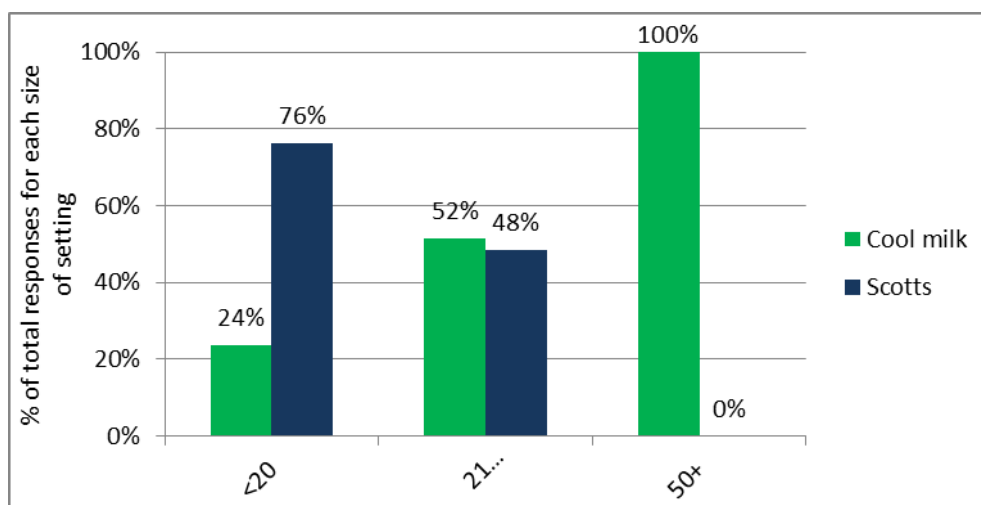
By size of organisation

The breakdown between these purchase/delivery options appears to differ according to the size of organisation, as shown in the graph below:



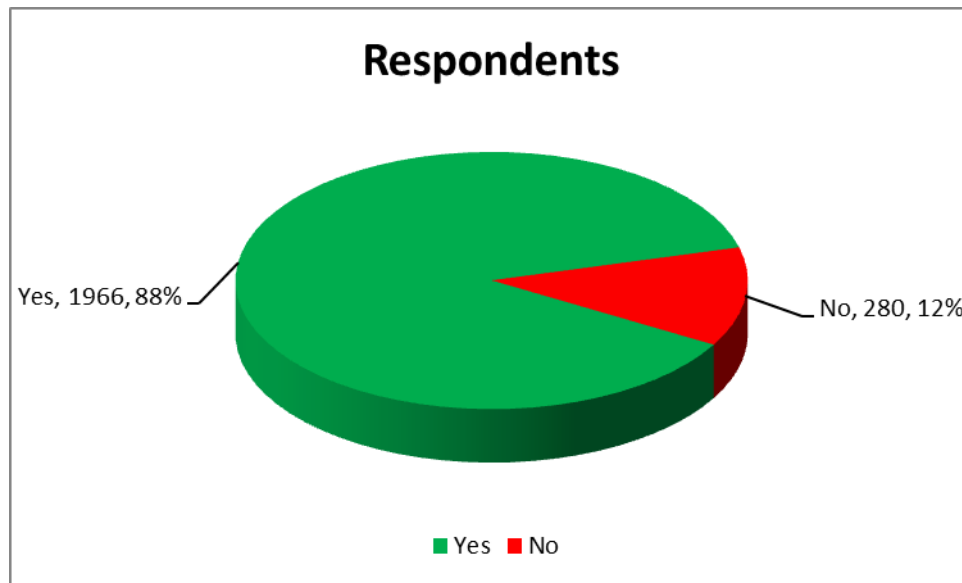
Interestingly, it appears that the larger (50+ staff) settings are more likely to have milk bought/delivered through local authorities than the smaller settings; more likely to buy (or have delivered) through retail outlets; and – correspondingly – less likely to have milk delivered directly through milk suppliers. However, the number of respondents here in the 50+ category is small (33 altogether) so these numbers are not necessarily significant.

Use of specialist suppliers



Of those childcare providers that report using a specialist supplier to deliver their milk, the vast majority (71%) report using Scotts, followed by another 25% who use Cool Milk, and 2% who use School Milk Services. But this varies according to the size of childcare provider. Of those who named one of these suppliers amongst the smaller childcare providers (with less than 20 staff), 76% mentioned Scotts, compared to 24% who mentioned Cool Milk. Amongst medium sized childcare providers (with 21 – 50 staff), the figures are much closer, with 48% mentioning Scotts and 52% mentioning Cool Milk. Only 8 larger childcare providers mentioned one of these suppliers – all of them mentioned Cool Milk.

2) Do you get milk delivered to your premises?



Of the 2,258 survey respondents, all but 12 respondents answered this question. Of those who did, the vast majority (88% of childcare providers) said that they get their milk delivered to their premises.

Comments from respondents indicate that most milk is delivered by milkmen/milk delivery services, sometimes via third party agents, but there are a few comments in other parts of the database clearly stating that some settings have their milk delivered from their local supermarket, often alongside other groceries.

Note - Some findings in the following cross tabulation analysis (marked with the symbol '†') are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

There was some variation by region, with a slightly higher proportion of childcare providers in England (88%) saying that they get their milk delivered to their premises, than in Scotland (79%) or Wales (80%).

There was also some variation by the type of childcare setting. 100% of the local authority respondents† said they get their milk delivered direct. The other higher than average response was from nurseries (93% said they get their milk delivered direct). Lower than average responses were from preschools (79%), and childcare centres (71%)†.

Respondents with more staff appeared to be more likely to get their milk delivered direct. 161 (98%) of those with 21 – 50 staff said they get their milk delivered direct; and 32 (97%) of those with 50+ staff†.

Important note

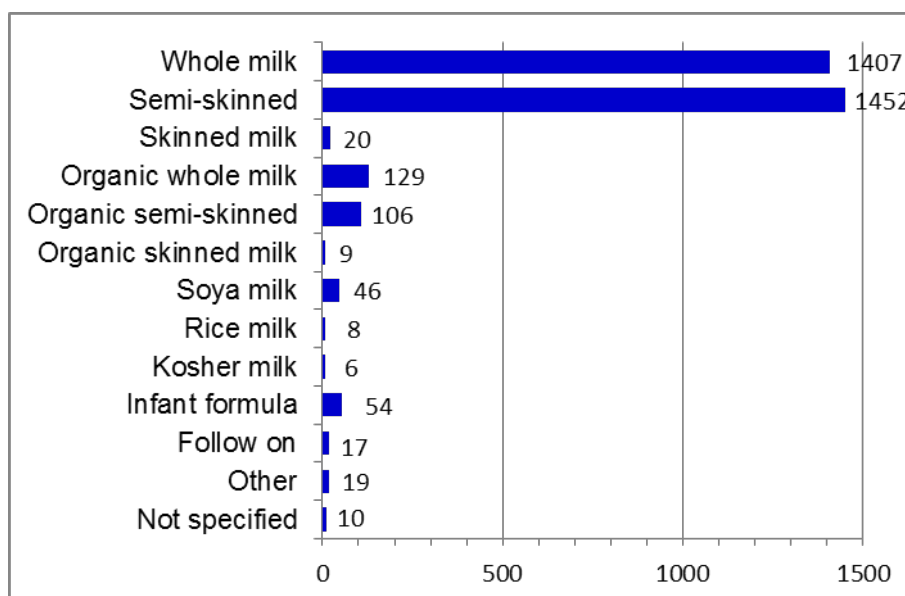
The numbers and percentages in this section relate to the overall numbers of settings reporting each answer, rather than to actual volume of milk used overall. As shown in (E) and (F), most of the individual childcare providers responding to the survey are small. It is evident that the proportion of milk delivered (rather than number of settings getting deliveries) is almost certainly significantly higher, as the larger settings tend to use deliveries significantly more. Unfortunately, the information available in this survey database does not allow us to accurately analyse the data to do this calculation.

However, inspection of the data suggests that at least 90% of milk under the Nursery Milk Scheme is probably delivered, possibly more.

SECTION 3: MILK USED AS PART OF NURSERY MILK SCHEME

3) What kind of milk do you buy or order?

(Please tick all boxes that apply. Options - whole milk, semi skimmed milk, skimmed, Kosher milk, Organic (whole milk / semi skimmed milk / skimmed), soya milk, rice milk, infant formula, follow on formula, Other special – please specify)



Sample – 2,248. 10 respondents did not answer.

95% of childcare settings that responded to the survey buy either whole milk or semi skimmed milk or both, and as can be seen in the pie chart above, these two types of milk account for 87% of the types of milk mentioned.

Note - Some findings in the following cross tabulation analysis (marked with the symbol ‘†’) are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

Whole milk is purchased by 1407 (63%) of childcare settings that responded to the question. The cross tabulations show that usage of whole milk is higher in Scotland (78% of 135 settings) compared to England (62% of 207) or Wales (60% of 87). Usage of whole milk is also highest in nurseries (76% of 540).

Semi-skimmed milk is purchased by 1452 settings (65%). Usage of semi-skimmed milk is slightly higher in Wales (69%) compared to England (66%) or Scotland (41%). Usage is slightly higher in large settings with 50+ staff† (23/70%)

Organic products were mentioned by 181 (8%) different respondents (62 using more than one type – hence the numbers in the chart should not be added together). Usage is slightly higher amongst childminders (11%).

Soya milk is used by 46 settings (2%). Usage of soya milk is fairly similar by country, but slightly higher amongst nurseries† (25 respondents / 5%).

Infant formula is used by 54 (2.4%). Usage was fairly similar by country, but only used by nurseries† (25 resp. / 5%) and childminders (28 resp. / 2%).

19 respondents mentioned 20 other types of (non-listed) milks comprising lactose free milk (5 mentions), fluoridated / dental milk (4), goats' milk (3), oat milk (2), Pergal machine / box milk (2), organic milk – type unspecified (2), Aptamil 'Hungry Milk' / 'Comfort Milk' (1) and coconut milk (1).

It should also be noted that 1,337 childcare settings (59%) only purchase one type of milk (over 90% of which is either whole milk or semi-skimmed milk), 804 (36%) purchase two types (over three quarters of which is whole milk plus semi-skimmed milk), and 117 (5%) purchase 3 or more types of milk.

3a) Please tell us more about why you buy other types of milk (i.e. other than standard whole, or semi-skimmed milk or infant formula)

(Options - a) because of your own religious or cultural beliefs, b) to fit in with religious or cultural beliefs of the families of children in your care, c) because of your own beliefs about the health benefits of different types of milk, to fit in with beliefs about the health benefits of different types of milk held by the families of children in your care, d) to meet needs of children in your care who have allergies / intolerances, e) other – explain).

Why specific types of milk are purchased	Mentions
(Prompted) FAMILIES' beliefs about the health benefits	57
(Prompted) YOUR OWN beliefs about the health benefits	49
(Prompted) To meet the needs of children with allergies or intolerances	48
(Prompted) To fit in with FAMILIES' religious or cultural beliefs	13
(Prompted) To fit in with YOUR religious or cultural beliefs	5
Other (unprompted) reasons given why specific products used	23
<i>Organic: parents requested it (9)</i>	9
<i>Organic: option offered / recommended by supplier (4)</i>	4
<i>Organic: other reasons were - habit (2), prefer organic - no further explanation (2), tastes better (1), government recommended it (1), just allocated it (1)</i>	7
<i>Fluoridated milk prevents dental decay (2)</i>	2
<i>Pergal box – to encourage self-service by children</i>	1
Total number of reasons mentioned	218

Source – 2,248 survey respondents. 10 respondents did not answer question 3

266 child settings purchase other types of milk other than standard whole, or semi-skimmed milk or infant formula, of which 107 gave reasons why as summarised in the table above (of which 69 respondent gave one reason and 38 respondents gave two or more reasons). 159 respondents gave no reason.

The main (prompted) reason why specific types of milk are purchased was to fit in with families' beliefs about the health benefits (57 mentions, 3% of the total sample), followed by respondents' own beliefs about the health benefits (49 mentions, 2%) and to meet the needs of children with allergies or intolerances (48 mentions, 2%). These reasons were mentioned by similar proportions in the three countries, but the cross tabulation analysis identified some differences by type and size of organisation, as summarised below.

"To fit in with families' beliefs about the health benefits" (3%) was mentioned more frequently by childminders (3%) and nurseries (3%) compared to pre-schools (1%). No other type of setting mentioned this. It was mentioned by 3% of small settings employing less than 20 staff and by 2% of settings employing 21-50 staff, but not mentioned by any settings employing 50+ staff.

"Respondents own beliefs about the health benefits" (2%) was mentioned by 3% of childminders, 2% of nurseries and 1% of pre-schools, but no other type of setting. It was also mentioned by a higher proportion (4 of 33 respondents† - 12%) of settings employing 50+ staff compared to 2% employing less than 20 and none employing 21-50 staff.

"To meet the needs of children with milk allergies and intolerances" (2%) was mentioned more frequently by nurseries (4%) compared to pre-schools (2%) or childminders (1%). It was also mentioned more frequently by larger settings employing 50+ staff (2 of 33 respondents† - 6%) and settings employing 21-50 staff (7%) compared to small settings employing less than 20 staff (2%)

Comment

2,125 out of 2,248 (95%) of all childcare settings responding to the question use either whole milk or semi-skinned milk.

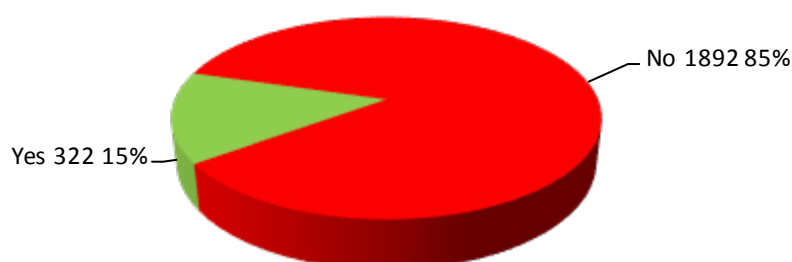
Overall, 244 (11%) of childcare settings buy 'special' milks, some buying several types. 181 (8%) settings use organic milks (usually instead of and sometimes alongside non-organic milk) and 70 (3%) settings use other types of milk (two thirds of which use soya milk), nearly always alongside regular or organic milk.

88 (4%) settings use specific types of milk because of their own or the childrens' families' beliefs about health benefits or alternative milk, of which 83 (94% of the 88) buy organic milk, 10 (11%) buy soya milk and 3 (4%) buy other milk – oat / goat / rice milk. Furthermore, 48 (2%) settings buy other specific types of milk to meet children's milk allergies or intolerances, of which 34 (71% of the 48) buy soya milk, 8 (17%) buy rice milk, and 7 (15%) buy other types of milk – lactose free (4 mentions), goat's milk (2), oat milk (1).

4) Are there any children in your care who, because of their religion or cultural beliefs, or disability, or special needs, or for any other reason, cannot benefit fully from the Nursery Milk Scheme?

If so, please tell us about them.

Responses



Source – 2,214 survey respondents. 44 people did not answer question 4

Reasons why children cannot benefit fully from NMS	Mentions
Dairy / lactose intolerant	108
Dairy / (cow's) milk allergy	98
Special medical conditions / dietary requirements	29
Needs / prefers soya	26
Allergies (unspecified)	19
Does not like drinking milk / prefers other drink	10
Milk / dairy free	10
Children over 5 do not qualify	9
Needs / brings goats milk	7
Ethnic / cultural beliefs – do not drink milk	3
Dairy and soya free	3
Organic milk preferred	3
Vegan children	2
Miscellaneous other comments	13
Total mentions	340

85% of the 2,214 respondents that answered question 4 did not have any children in their care that cannot benefit fully from the Nursery Milk Scheme compared to 15% that do (most of which mentioned either 1 or 2 children, some had 3 children, and a few more than 3). Most gave 1 reason why not, about 100 gave 2 or more.

Note - Some findings in the following cross tabulation analysis (marked with the symbol '†') are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

The proportion of settings reporting children that cannot benefit fully from the Nursery Milk Scheme was slightly higher in Scotland (17%) and lower in Wales (8%) compared to England (15%).

The proportion also steadily rises with size of setting from 14% in small settings employing less than 20 staff, to 21% in settings employing 21-50 to 26% in settings employing more than 50 staff[†]. The proportion is lowest amongst childminders (6%), highest amongst nurseries (26%) and pre-schools (23%).

Reasons why children cannot fully benefit from the Nursery Milk Scheme

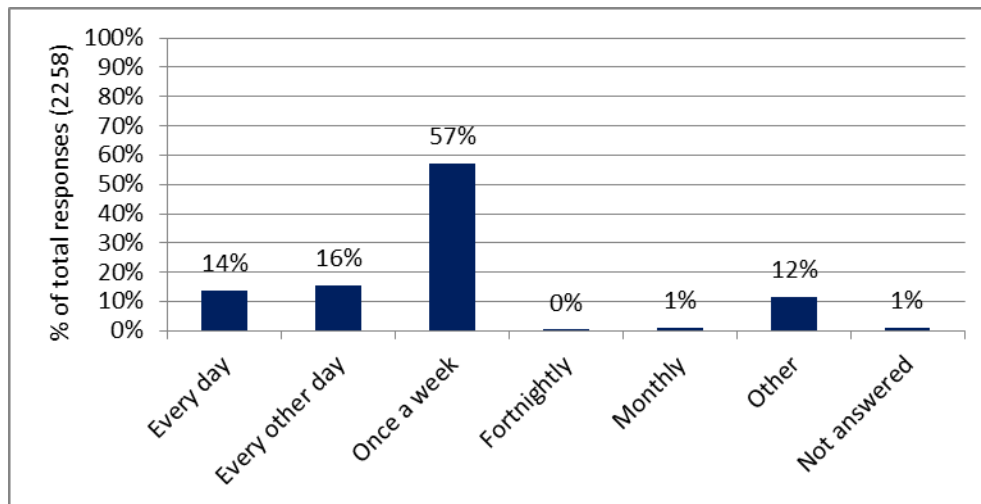
312 of the 322 childcare settings that said yes, also provided reasons why (340 in total, with some respondents providing more than one reason).

257 (76%) of the 340 reasons why children cannot benefit from the Nursery Milk Scheme were related to medical conditions / special dietary needs, nearly all of which were related to allergies (mainly dairy) or dairy product / lactose intolerance.

The proportion of all comments relating to not fully benefitting from the Nursery Milk Scheme due to medical / special dietary needs is higher in Scotland (16%) compared to England (11%) or Wales (7%). The proportion also rises strongly with size of setting, from 11% amongst settings employing less than 20 staff, to 14% for settings employing 21-50 staff and 55% (17 out of 31 respondents) for settings employing more than 50 staff[†]. The proportion is highest amongst nurseries (23%) and pre-schools (22%), but very low amongst childminders (3%).

26 responders said children needed or preferred soya milk, most of which is due to allergies or milk intolerance. Other reasons mentioned quite frequently were children do not like drinking milk (10 mentions) and children need or prefer goat's milk (9). Only three respondents specifically mentioned ethnic or cultural beliefs, and two settings cared for children who were vegans.

5) How often do you buy or order milk?



Of the 2,258 survey respondents, all but 24 (1%) answered this question. The majority (57% of childcare providers) said that they buy or order their milk once a week. 16% said they do this every other day; and 14% every day. Only 19 (1%) reported buying/ordering monthly; and only 3 respondents reported buying/ordering fortnightly.

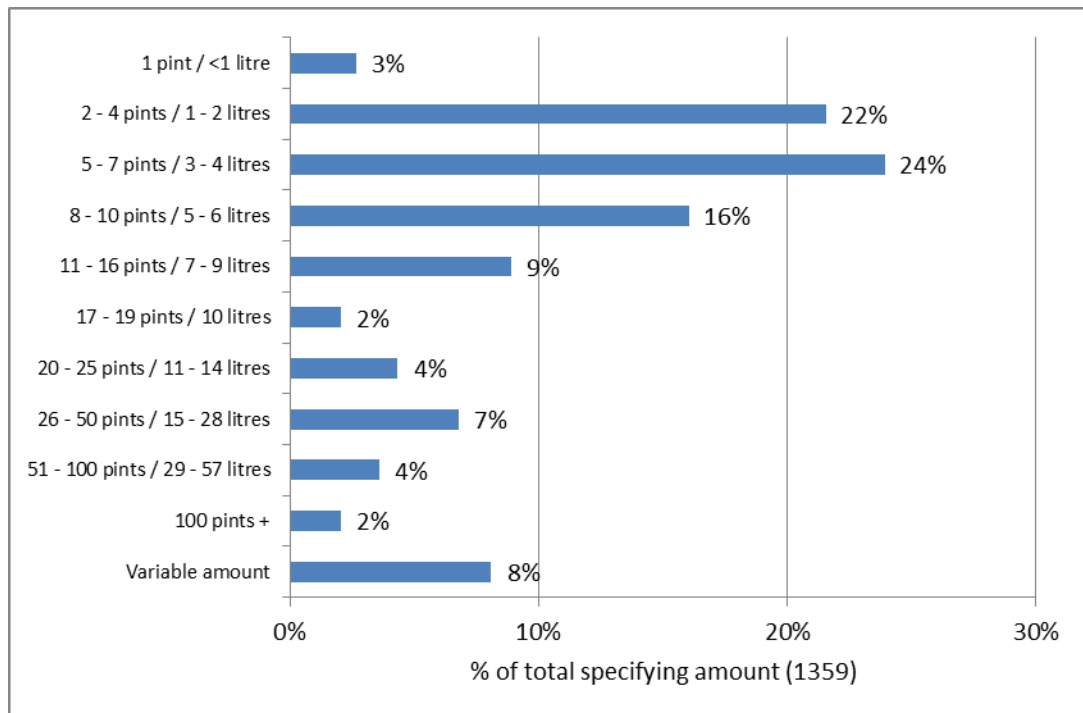
Note - Some findings in the following cross tabulation analysis (marked with the symbol '†') are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

There was some variation by region – with the pattern in Scotland looking significantly different from England and Wales. The most common frequency in Scotland is to buy/order every day: 33% of childcare providers in Scotland report this (compared to only 12% in England, and 20% in Wales). Another 22% in Scotland buy/order their milk every other day (compared to 15% in England, and 17% in Wales). In Scotland, only 30% of childcare providers reported buying/ordering their milk once a week (compared to 59% in England, and 56% in Wales).

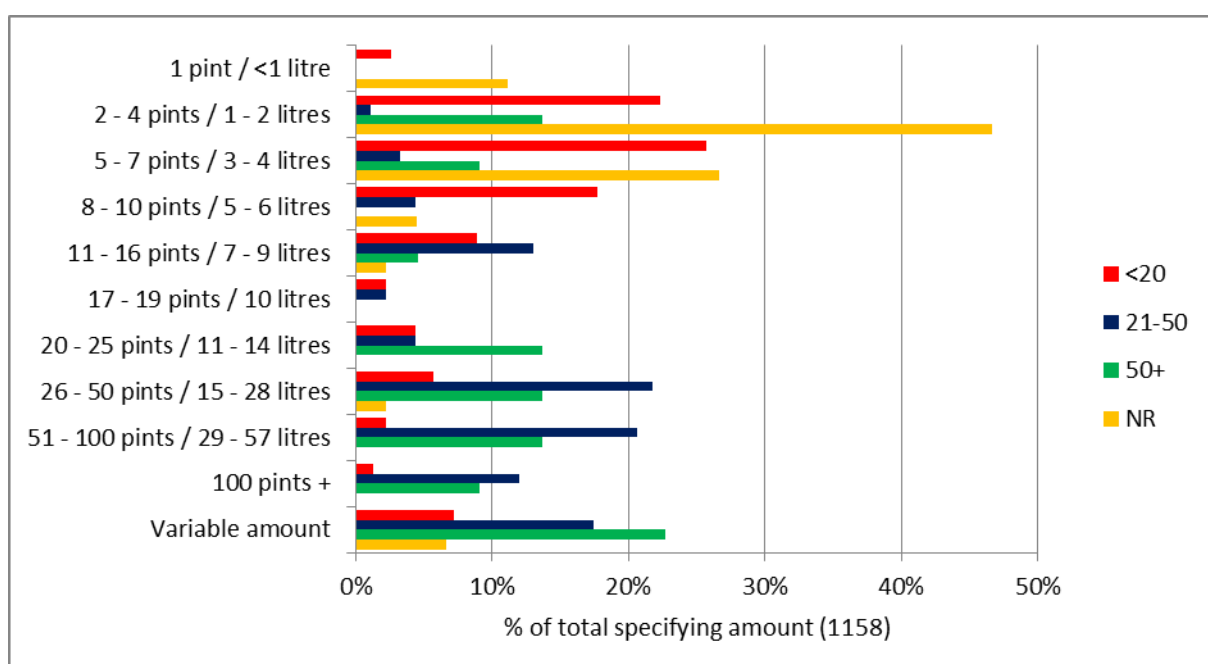
Smaller childcare providers tend to buy or order their milk less frequently than larger providers. 61% of those with less than 20 staff buy or order their milk weekly or less frequently; compared to 35% of those with 21-50 staff; and 30% of those with more than 50 staff†.

Childminders are much more likely to buy or order their milk weekly than any other type of provider. 79% of childminders buy or order their milk weekly; compared to only 33% on average across all of the other types of provider.

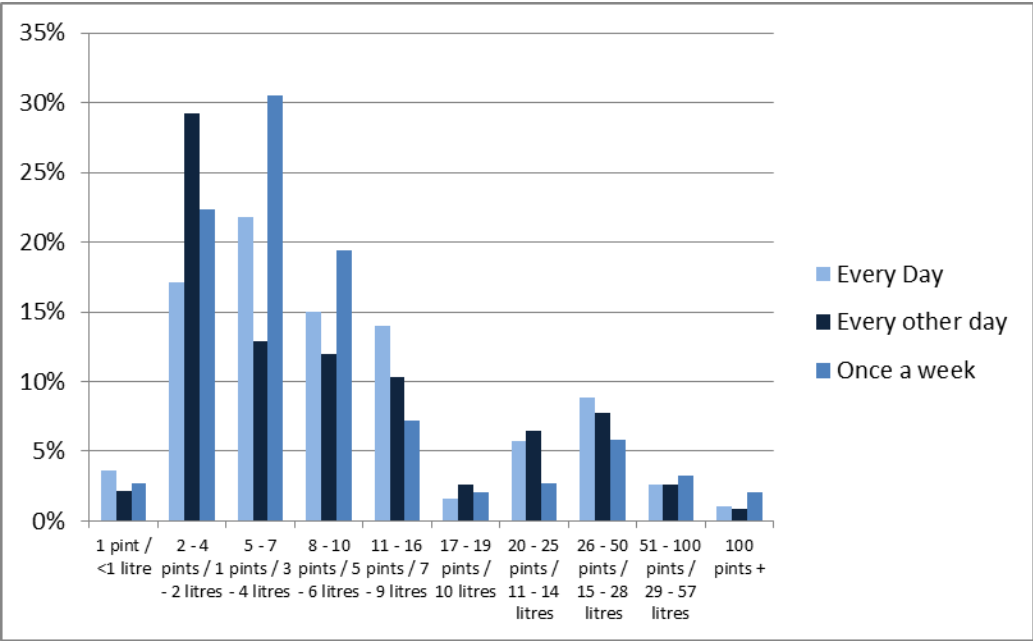
6) How much milk do you buy or order each time?



As expected, there is a wide range of the size of each individual purchase/order. Of those who responded to this question, the most common size was to buy/order between five and seven pints (3-4 litres) at any one time: 24% of childcare providers reported in this range. But some (3%) said that they buy/order buy less than a litre each time; and some (2%) said that they buy/order in excess of 100 pints each time. A significant number (8%) of childcare providers said that the size of their order/purchase varies.

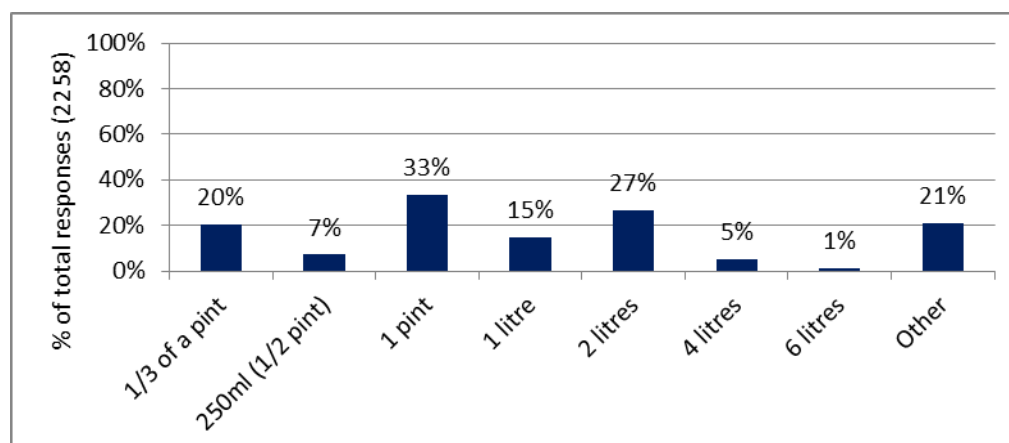


There is no significant variation to this by region. But it does vary by size of childcare provider, as expected, and as shown in the graph above, with smaller providers significantly more likely to buy/order smaller quantities; and larger providers significantly more likely to buy/order larger quantities.



Interestingly, looking at a cross-tab between this question and question 5, the amount of milk bought/ordered *does not* appear to relate to the frequency with which childcare providers make such purchases/orders.

7) What size of bottle or pack do you normally buy or order milk in?



Source – 2,258 respondents. 2,238 answered Q7, 20 did not.

There is a significant variation in the size of bottle or pack that childcare providers say they normally buy or order milk in, and a relatively high proportion (26% of childcare providers) said that they buy or order milk in more than one size.

Across all providers, the most commonly reported size is 1 pint (33% of childcare providers reported this – although sometimes alongside other sizes); closely followed by 2 litres (27%). The next most commonly used sizes are 1/3 of a pint (20% of childcare providers reported this – although sometimes alongside other sizes); followed by 1 litre (15%). Much smaller numbers reported getting their milk in ½ pint sizes (7%), 4 litre sizes (5%), or 6 litre sizes (1%).

476 childcare providers (21% of respondents) also mentioned another size of bottle or pack (often alongside one of the other options). Of these, a significant number (184) mentioned some form of small container/Snack Size pack, of whom 87 specifically said that these are in 200ml sizes. Another 138 mentioned some form of 2 pint container; and 43 mentioned some form of 4 pint container.

Hence, 28% of settings buy milk in small single serve containers (1/3 pint and equivalent sizes), i.e. by combining 20% mentions of 1/3 of a pint with the 184 (8%) mentions of small containers within 'others'. Furthermore, 80% of settings buy milk in bulk containers (1 pint up to 6 litres) sometimes (i.e. 8% of the total) alongside small single serve containers.

However, the database contains 439 entries where respondents say they are buying one or more type of 'bulk' container but no small single serve containers, yet 100% of the respondents enter prices in the 1/3 pint column (97% of which were at 30p per container). There is clearly an anomaly in these 439 sets of data, which are clearly inconsistent with information from the other 1,798 respondents that provided pack size and price data. However, for the analysis of this report, it

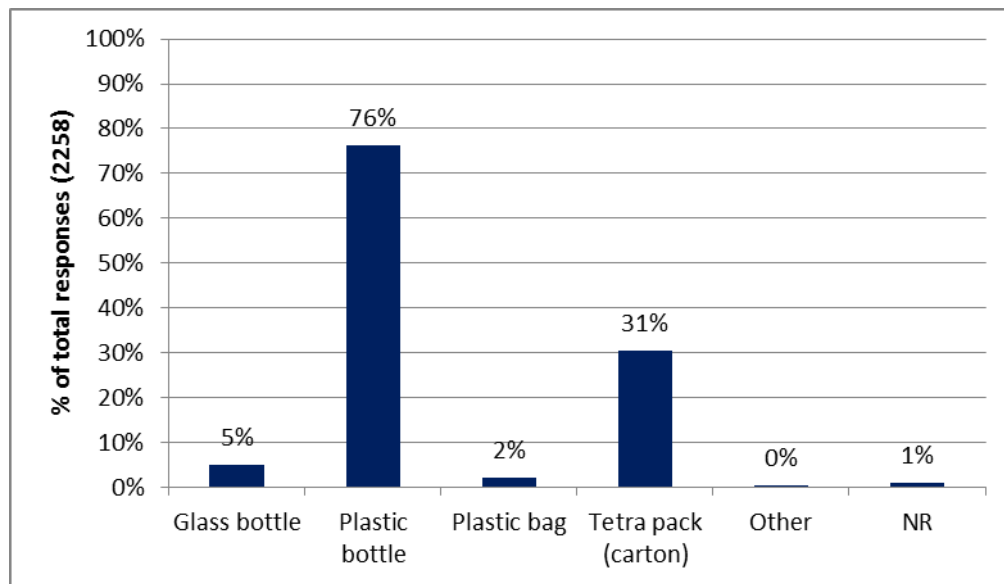
has been assumed that the 439 respondents truthfully recorded the range of containers they buy milk in (all in bulk containers of 1 pint to 6 litres) and 97% of this milk is claimed from the Nursery Milk Scheme at 90p per pint.

There is little variation by region, or by type of childcare provider. But there was some variation by size, with larger providers significantly more likely to buy or order their milk in 1/3 of a pint sizes (37% of those with more than 20 staff, compared to 19% of those with less); and significantly less likely to buy or order in pints (15% of those with more than 20 staff, compared to 35% of those with less).

Important note

The numbers and percentages in this section relate to the overall numbers of settings reporting each answer, rather than to actual volume of milk used overall. As shown in (E) and (F), most of the individual childcare providers responding to the survey are small. It is evident that the proportion of small single serve containers (1/3 pint and equivalent sizes) used nationally, rather than the number of settings using them as reported in the survey, is almost certainly significantly higher, as the larger settings tend to use these sizes significantly more.

8) What kind of container do you get your milk in?



Of the 2,258 survey respondents, all but 24 (1%) answered this question. A significant proportion (15% of childcare providers) said that they get their milk in more than one type of container.

Across all providers, the most commonly used type of container is plastic bottles (76% of childcare providers get their milk in this way – although sometimes alongside other methods).

The next most commonly used method is to get milk in tetra packs (cartons) (31% of childcare providers get their milk in this way – although sometimes alongside other methods).

Important note. Survey respondents were not asked to provide details of container size for each type of container purchased, making any useful analysis of this data difficult. In particular, it is clear from comments in other parts of the report that both plastic bottles and tetra packs (cartons) may be in *any* size - in particular 1/3 pint single servings or larger bulk containers (1 pint up to 6 litres). This is especially important as many respondents loosely refer to 'tetra pack (cartons)' as meaning 1/3 pint cartons, and 'plastic bottles' as meaning bulk containers, which is clearly not always the case.

The other options are reported much less often: getting milk in glass bottles reported by only 5% of childcare providers (sometimes alongside other methods); and getting milk in plastic bags mentioned by only 2% (again, sometimes alongside other methods). A very small number of respondents (ten, in total) mentioned some other method of getting milk, including a couple of childcare providers who said they get at least some of their milk as baby formula.

Note - Some findings in the following cross tabulation analysis (marked with the symbol '†') are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

There was some variation by region. Fewer respondents in Scotland said they get their milk in plastic bottles, and more said they get it in tetra packs (cartons): 86 (63%), and 50 (37%) respectively. The opposite is the case in Wales, where more respondents said they get their milk in plastic bottles, and (significantly) fewer said they get it in tetra packs (cartons): 76 (87%), and 4 (5%) respectively.

There was some variation by the type of childcare setting. Fewer pre-school respondents† said that they get their milk in tetra packs (cartons), and more in glass bottles: 32 (16%), and 20 (10%) respectively. In the various “early years” settings†, significantly fewer said they get their milk in plastic bottles, and significantly more in tetra packs (cartons): 98 (57%), and 71 (41%) respectively.

Respondents with more staff appeared to be less likely to get their milk in plastic bottles and more likely to get their milk in tetra packs (cartons). 102 (62%) of those with 21 – 50 staff said they get their milk in plastic bottles, and 64 (39%) in tetra packs (cartons). With 50+ staff (although with small numbers of respondents†), this trend continues: 15 (45%) said they get their milk in plastic bottles, and 18 (55%) in tetra packs (cartons).

Q7 & 8 Additional cross tabulation and analysis of the findings

Additional analysis of the findings

Many respondents buy milk in different sizes and packaging type, which makes interpretation of the findings difficult. However, inspection of the data identified 1,760 respondents that buy only 1 type of packaging and 1 type of container. This simplification helps yield more usable data, which is summarised below.

Bulk containers (1 pint to 6 litres). – 1,386 respondents

Where respondents buy 1 pint bottles or more, inspection of the database shows that they are virtually all used for pouring milk into cups or feeding bottles, and can therefore all be classified as 'bulk' containers. Furthermore, if respondents purchase 'bulk containers' of different sizes (all of which are 1 pint or larger in volume), they are all effectively 'bulk containers'.

Material	Number of respondents	Container Size	How served	Number of respondents
Plastic bottles	1231 (89%)	From 1 pint to 6 litres (incl. multiples of these)	Pour into feeding bottles / cups	1,346 (97%)
Glass bottles	91 (6%)		Drink direct – individual serving†	16 (1%)
Tetrapack	39 (3%)		Other (cooking / give to parent) †	3 (-%)
Cartons†	26 (2%)		Not answered†	22(2%)
Plastic bags†	26 (2%)			
Total	1387		Total	1387

Single serve containers – 346 respondents

These respondents only buy either 1/3 pint containers, 189ml containers, 200ml containers or snack pack containers.

Material	Number of respondents	Container Size	How served	Number of respondents
Tetrapack carton	272 (79%)	Includes 1/3 pint 189ml 200ml Snack packs	Pour into feeding bottle / cup†	48 (14%)
Plastic bottle	66 (19%)		Drink direct – individual serving	289 (84%)
Tetrapack carton +	8 (2%)		Other (choice self-drink or pour)	1 (-%)
Plastic bottles†	8 (2%)		Not answered†	9 (2%)
Total	346		Total	346

Note - Some findings in the following cross tabulation analysis (marked with the symbol '†') are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

250 ml ("½ pint") containers – 36 respondents†

Although this is not a statistically significant sample, nevertheless, it does give an insight into how 250ml milk containers are used.

36 respondents buy milk only in 250ml containers. 20 of these were plastic bottles and 16 were named as tetra pack cartons. 16 pour the milk into reusable bottles or cups and 16 serve them as single servings (either respondents are using 1/3 pints but mistakenly record them as 250ml sizes or they are giving 250ml containers (which are equivalent to 44% of a pint) to children as single servings – it is not possible to say which statement is true).

Comment

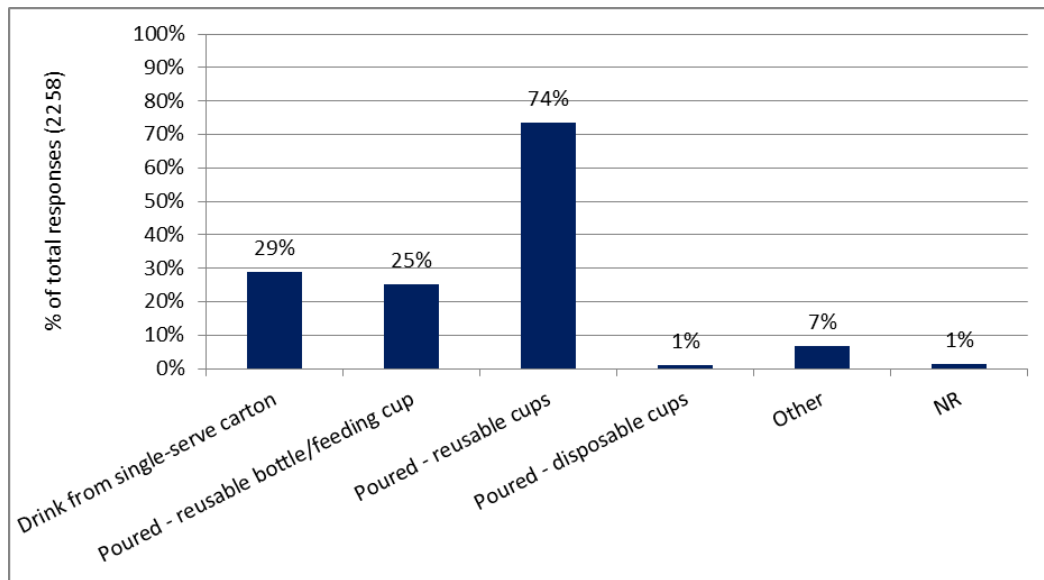
Findings that *are* statistically significant are:

- (1) virtually all of those who buy in bulk serve the milk in feeding bottles / cups;
- (2) virtually all who buy individual cartons - children drink directly from them;

And a finding that is almost statistically significant (48 mentions)

- (3) Quite a lot (i.e. around 14%) of those who buy individual 1/3 pint size cartons pour the milk out into cups or bottles to serve to children.

9) How is the milk served to the children?



Of the 2,258 survey respondents, all but 29 (1%) answered this question. A significant proportion (33% of childcare providers) said that they serve milk to children in more than one type of container.

Overall, 86% of settings serve milk to children in cups or bottles, mainly by staff pouring the milk out, but a significant number (40 respondents) said that they poured milk into jugs for children (mainly older ones) to serve themselves. 29% of settings serve milk to children to drink from single-serve cartons (many respondents also mentioned they do this using a straw).

The most commonly method used for serving is to pour milk into reusable cups (74% of childcare providers do this – although sometimes alongside other methods), followed by pouring milk into reusable bottles/feeding cups (25% of childcare providers do this – although sometimes alongside other methods). The method of pouring milk into disposable cups is very rarely used (1% of all childcare providers mentioned this as at least one of their options). 7% of childcare providers said that they used another method of serving milk – either on its own, or alongside one of the methods already described. .

Note - Some findings in the following cross tabulation analysis (marked with the symbol †) are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

Larger organisations (those with 50 or more staff †) were more likely to use single-serve cartons (48%) compared to those with 21-50 staff (36%) or less than 20 staff (29%). There were slight differences by types of childcare provider – most significantly, that local authorities (albeit a very small sample †) were much more likely (60%) to use single-serve cartons than any other group.

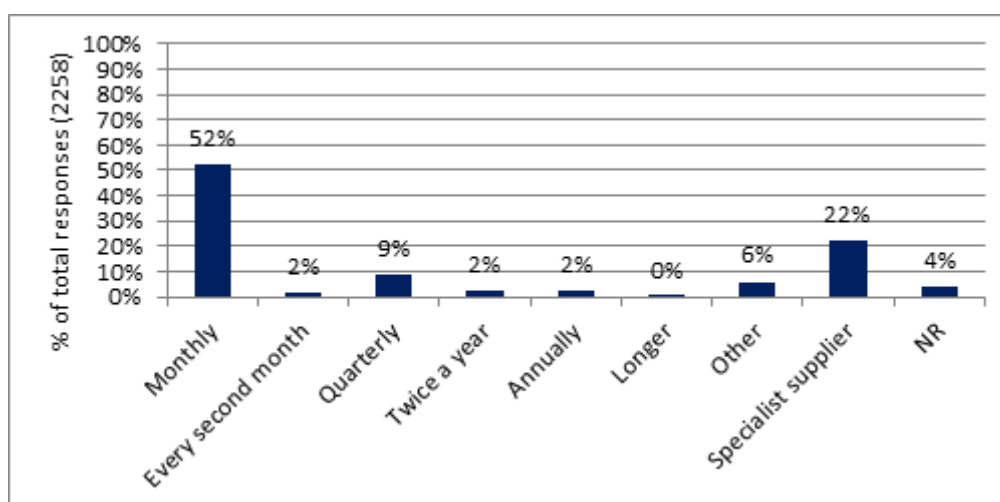
10) If you currently get your milk in a particular type of packaging, would it be an issue if that changed?

Respondents did not (in most cases) specify which type of packaging or pack size was involved in relation to any 'issues' they raise if it were changed. It is clear from the comments that some respondents interpreted the question as changing packaging material, whilst others interpreted it as changing pack size.

Data in this section based on the full sample is not considered to be meaningful or reliable, and is considered unsafe for publication.

However, the findings do provide some useful insights, and a summary of the analysis can be found in appendix 1, although the findings should be treated with extreme caution.

11) How often do you claim from the NM reimbursement unit?



The majority (52%) of childcare providers who responded said that they claimed monthly for the Nursery Milk reimbursement unit. 9% said that they claimed quarterly; and much smaller numbers twice a year (2%), annually (2%), or every second month (2%). A much smaller number (less than 1%) said that they claimed less often than annually.

6% of respondents said “other”. This included 35 mentions of an alternative frequency: termly (13 mentions), and four monthly (22). In addition, 29 said they claim via their local authority; and 22 said “as and when”, or “do not know”.

The remaining 22%, a significant proportion of the total, said that they used a specialist supplier to manage their claims. Only 4% of childcare providers did not respond to this question.

Note - Some findings in the following cross tabulation analysis (marked with the symbol ‘†’) are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

There was some variation by region, with childcare providers in Scotland† much less likely to claim monthly (22%) than those in England (54%) or Wales† (54%).

Smaller organisations (those with less than 20 staff) were more likely to claim monthly (55%) than those with 21-50 staff (38%), or those with over 50 staff† (21%).

Nurseries (50%) and childminders (67%) were much more likely to claim monthly than other types of childcare provider (an average of 24% across all other groups).

12) What influences how you buy or order your milk?

Please rank your top 3 influences from the list of prompted options – quality, price, convenience, loyalty, service, packaging type, or please state other influences.

INFLUENCES	Ranked 1 st	Ranked 2 nd	Ranked 3 rd	Total responses
Prompted influences				
Convenience	1357 (61%)	377 (17%)	179 (8%)	1913 (86%)
Service	206 (9%)	534 (24%)	482 (22%)	1222 (55%)
Quality	170 (8%)	363 (16%)	396 (18%)	929 (42%)
Price	113 (5%)	281 (13%)	237 (11%)	631 (28%)
Loyalty	77 (3%)	166 (7%)	203 (9%)	446 (20%)
Packaging type	54 (2%)	153 (7%)	224 (10%)	431 (19%)
Other unprompted influences				
Administration free service – no / less paperwork	64 (3%)	35 (2%)	54 (2%)	153 (7%)
Free fruit and bread	25 (1%)	19 (0.8%)	14 (0.6%)	58 (3%)
LEA / Govt Body contract / choice / recommendation	44 (2%)	1 (<0.1%)	2 (0.1%)	47 (2%)
Delivered to setting / delivery as needed	7 (0.3%)	27(1%)	7 (0.3%)	40 (2%)
Recommended / word of mouth	15 (0.6%)	6 (0.3%)	0 (00%)	21 (1%)
Free equipment – fridge / Pergal machine / beakers	6 (0.3%)	15(0.6%)	0 (00%)	20(1%)
Free milk scheme	16 (0.7%)	1 (<0.1%)	2 (0.1%)	19 (0.8%)
Advertised / read in magazine	15 (0.6%)	3 (0.1%)	1(<0.1%)	19 (0.8%)
Other (6 with 5-10 comments)	31 (1%)	5 (0.2%)	12 (0.5%)	48 (2%)
Misc (45 with < 5 comments)	23 (1%)	7 (0.3%)	22 (1%)	52 (2%)

Data source – 2,221 survey respondents. 37 people did not answer this question.

Note – all percentages in the above table are calculated on a sample of 2221 that answered this question

As seen in the table above, convenience is by far the most important of the prompted influences on how milk is bought or ordered (ranked 1st by 61% of the total sample, compared less to 10% for all other influences.

Note - Some findings in the following cross tabulation analysis (marked with the symbol ‘†’) are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

- Convenience is ranked as a top influence (1st, 2nd or 3rd) by 86% of all survey respondents, and ranked 1st by 61%. Supplementary comments indicate that ‘delivery to the setting’ and ‘less paper work’ are key aspects of convenience.

Convenience was ranked (1st – 3rd) more frequently by respondents in Wales (89%) and England (87%) compared to Scotland (70%). It was ranked more frequently by childminders (90%) and pre-schools (88%) compared to nurseries (79%) and early education settings unspecified (73%). It was also

ranked more frequently by small settings with less than 20 staff (88%) compared to settings employing 21-50 (66%) or employing 50+ staff† (70%).

- Service is ranked as a top influence (1st, 2nd or 3rd) by 55% of all survey respondents, and ranked 1st by 9%. Supplementary comments indicated 'delivery to the door' and 'reliability' as key aspects of service.

Service was ranked (1st – 3rd) more frequently by respondents in Wales (89%) compared to England (87%) or Scotland (70%). It was mentioned more frequently by early education – unspecified (64%) and pre-schools (61%) and less frequently by childminders (53%) and nurseries (61%). It was also mentioned more frequently by settings employing less than 20 / 21-50 staff (both 55%) compared to settings employing 50+ (15 out of 30† – 50%).

- Quality is ranked as a top influence (1st, 2nd or 3rd) by 42% of all survey respondents, and ranked 1st by 8%. Only a small number of supplementary comments were given which didn't elucidate their understanding of quality.

Quality was ranked (1st – 3rd) similarly by region, but slightly more frequently by nurseries (45%) and childminders (43%) compared to early education – unspecified (39%) and pre-schools (36%). It was also ranked slightly more frequently by small settings employing less than 20 staff (42%) compared to settings employing 21-50 (37%) or 50+ staff (12 of 30† – 40%).

- Price is ranked as a top influence (1st, 2nd or 3rd) by 28% of all survey respondents, and ranked 1st by 5%. Supplementary comments indicate that being free is a key aspect of price.

Price was ranked (1st – 3rd) more frequently by respondents in Wales (49%) and Scotland (56%) compared to England (27%). It was ranked more frequently by early education – unspecified (38%), pre-schools (35%) and nurseries (35%) compared to a relatively low frequency by childminders (22%). It was ranked more frequently by settings employing 21-50 staff (42%) or 50+ staff† (37%) compared to settings employing less than 20 staff (27%).

- Loyalty is ranked as a top influence (1st, 2nd or 3rd) by 20% of all survey respondents, and ranked 1st by 3%. Supplementary comments indicate that recommendation and word of mouth is a key aspect of loyalty.

Loyalty was ranked (1st – 3rd) very similarly by region, but more frequently by pre-schools (24%) and childminders (21%) compared to nurseries (18%) and early education – unspecified (14%). It was also mentioned more frequently by small settings employing less than 20 staff (20%) compared to settings employing 21-50 (16%) or 50+ staff† (4 out of 30 - 13%).

- Packaging type is ranked as a top influence (1st, 2nd or 3rd) by 19% of all survey respondents, and ranked 1st by 2%. Supplementary comments indicate that cartons, particularly snack pack format, is an important packaging type.

Packaging type was ranked (1st – 3rd) more frequently by respondents in England (20%) compared to Scotland (16%) or Wales (11%). It was mentioned slightly more frequently by pre-schools (22%), childminders (22%) and early education – unspecified (22%) compared to nurseries (12%). It was also mentioned more frequently by settings employing 50+ staff (8 out of 30† - 27%) compared to settings employing less than 20 staff (20%) or 21-50 staff (15%).

Other unprompted influences mentioned were as follows:

- An administration free service, usually meaning no or less paperwork, is the main unprompted influence on how milk is bought or ordered – mentioned by 153 (7%) of total respondents.

An administration free service was ranked (1st – 3rd) almost entirely by respondents in England (8%) compared to none in Scotland (0%) and one in Wales (1%). It was predominantly mentioned by early education – unspecified (22%), childminders (9%) and nurseries (7%) plus some pre-schools (3%). It was only mentioned by settings employing less than 20 staff (7%) or 21-50 staff† (4%).

- The availability of free extras – bread and fruit, and equipment – or that the scheme provides free milk, were also mentioned spontaneously as influences by a combined 4% (97) of respondents.
- For 47 respondents (2%) they were influenced by their Local Education Authority, Council or another public sector body, which had a contract with or advised them of a supplier.
- Respondents also mentioned other factors, albeit very low frequency, including delivery to the setting (1%), recommendation via word of mouth (1%) and advertisements in magazines (1%).

13) How much do you pay for milk for each unit of milk purchased?

The data on price collected from childcare settings needs to be treated with caution. Many childcare settings in question 7 answered that they buy milk (or have it delivered) in more than one size of bottle or pack; and many answered in question 8 they buy milk (or have it delivered) in more than one type of packaging. In many such cases, it is impossible to know what volume of milk (or package size) the “unit prices” in answers to this question (13) relate to.

Therefore we have not analysed the entire data set for question 13. Instead, we have used a smaller dataset consisting only of those answers where an individual childcare setting has clearly indicated that they buy milk (or have it delivered) in only one type/size of packaging. This gives us a reliable dataset of answers – and prices – for this restricted number (see earlier explanation on questions 7 and 8).

The restricted data set that we have used includes responses from 1768 childcare providers. Of these, 645 replied that they didn’t know the unit price for the milk they purchased or had delivered. But the others (1123) gave clear pricing information for units, broken down as follows:

Responses	Number of Respondents
Quoting prices for 1/3 pint or other small container	210
Quoting prices for 250ml	2
Quoting prices for 1 pint	196
Quoting prices for 1 litre	77
Quoting prices for 2 litre	95
Quoting prices for 4 litre	30
Quoting prices for 6 litre	11
Quoting prices in "other"	502
Subtotal	1123
Not known	645
Grand total	1768

The raw average³ equivalent price paid per pint of milk across all of these respondents was 71.55p; with the equivalent price per pint reducing as volume

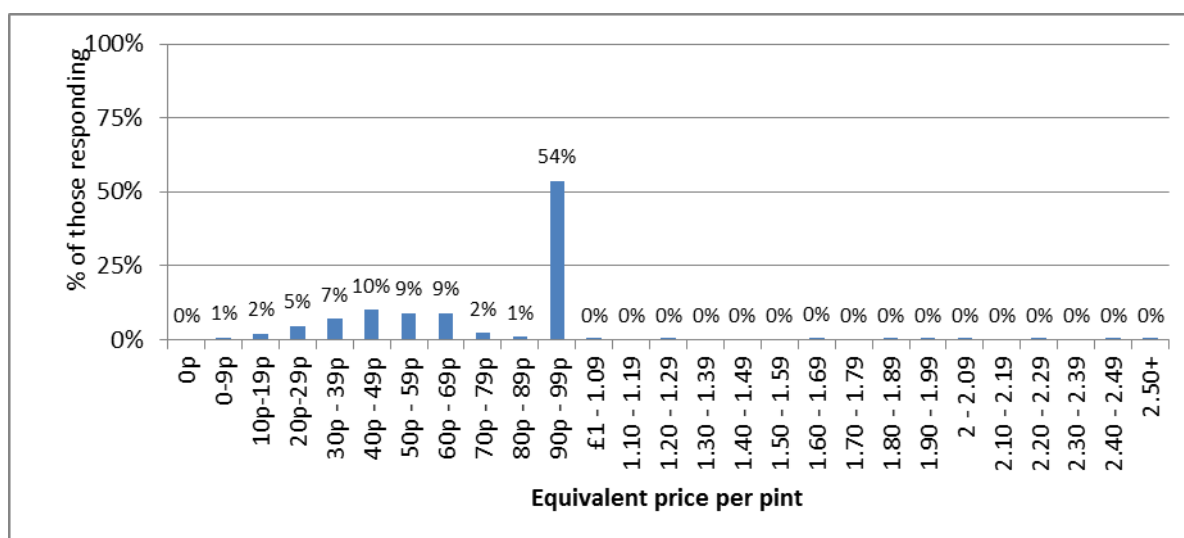
³ The ‘raw’ average calculated here does not take account of the fact that some childcare settings buy greater volumes of milk than others. All prices in this section – unless explicitly described otherwise – have been converted into the equivalent price of a pint of milk (e.g. “30p per 1/3 pint” has been quoted as an equivalent price per pint of 90p).

sizes increase (as expected: so there are generally economies of scale from buying in larger container sizes). These figures are set out in the table below:

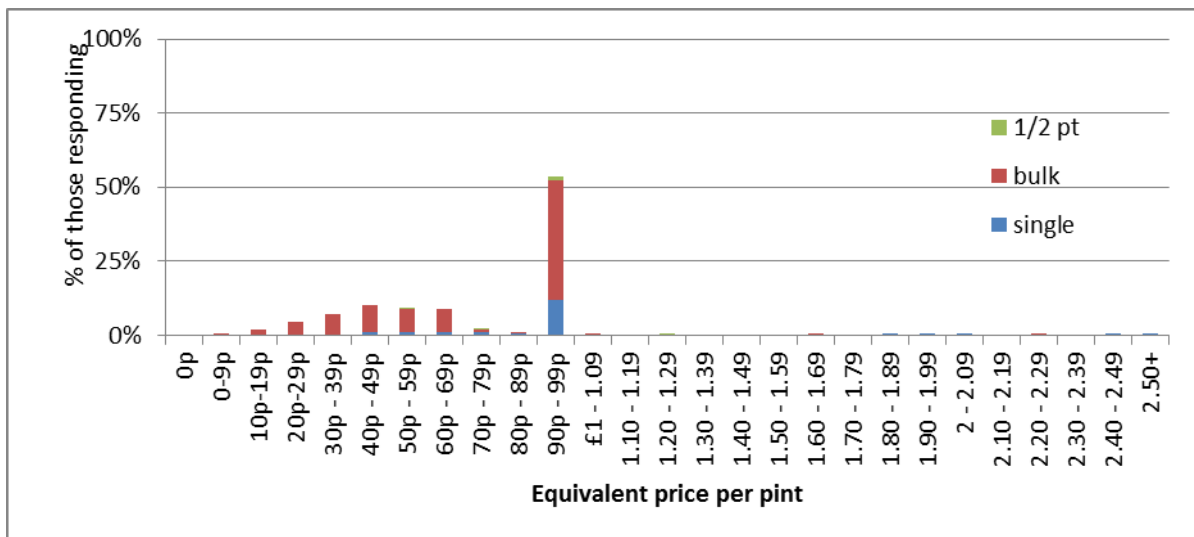
Average prices per pint

'Raw' average quoted price from 1/3 pint respondents	86.59p
'Raw' average quoted price from 250ml respondents	n/a
'Raw' average quoted price from 1 pint respondents	53.15p
'Raw' average quoted price from 1 litre respondents	52.14p
'Raw' average quoted price from 2 litre respondents	41.28p
'Raw' average quoted price from 4 litre respondents	19.98p
'Raw' average quoted price from 6 litre respondents	18.39p
'Raw' average quoted price from 'other' respondents	85.32p
Overall 'raw' average	71.55p

The chart below shows the percentage of all respondents quoting prices in various price brackets. There is a wide variation. It is very noticeable that the largest proportion of respondents (54%) pay in the 90p-99p price bracket. Although not visible on the chart, *there are prices quoted at every point*, including one respondent claiming to pay more an equivalent of more than £2.50 per pint.



In order to better understand how this data is made up, we have broken down the responses into a number of different categories: those responses clearly stating that they buy in 1/3 pint or other single-sized servings (346 responses); those buying half pints (36 responses); and those buying in larger sizes, which we have called 'bulk' (1386 responses). The chart below is a repeat of the previous one, but showing this breakdown for each price bracket:



The rest of this section looks at each of these three categories in more detail.

Single servings

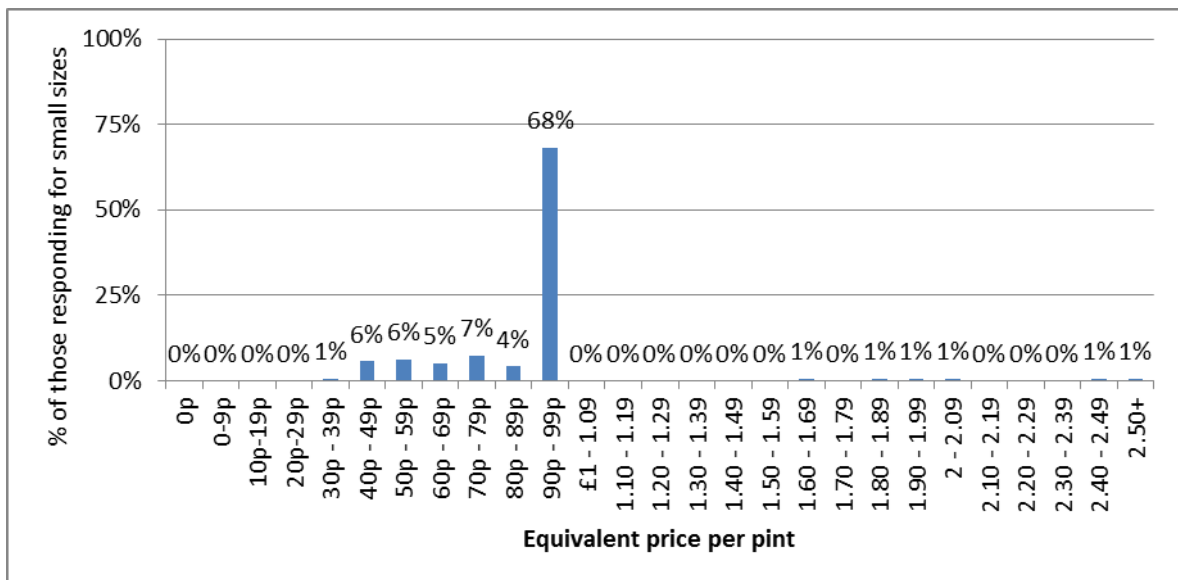
The 346 respondents who buy milk (or have it delivered) in single serving sizes are broken down as follows:

Responses	Number of Respondents
Quoting prices for 1/3 pint	187
Quoting prices for other single portion sizes	8
Subtotal	195
"Not known"	139
Response not clear	12
Subtotal	151
Grand total	346

The majority of those who have quoted a price buy in 1/3 pint units, and the raw average prices are as follows:

Average Prices per pint	
'Raw' average quoted price from 1/3 pint respondents	86.04p
'Raw' average quoted price from other single portion respondents	93.19p
Overall 'raw' average	86.33p

The overall raw average in this group is an equivalent price per pint of 86.33p, but there is a considerable spread across many different price brackets, as seen in the chart below.



The majority of these respondents (68%) buy in the 90p-99p price bracket, but *there are examples at nearly every price bracket* (including £2.50+) (although these are not easily visible on the chart).

250ml sizes

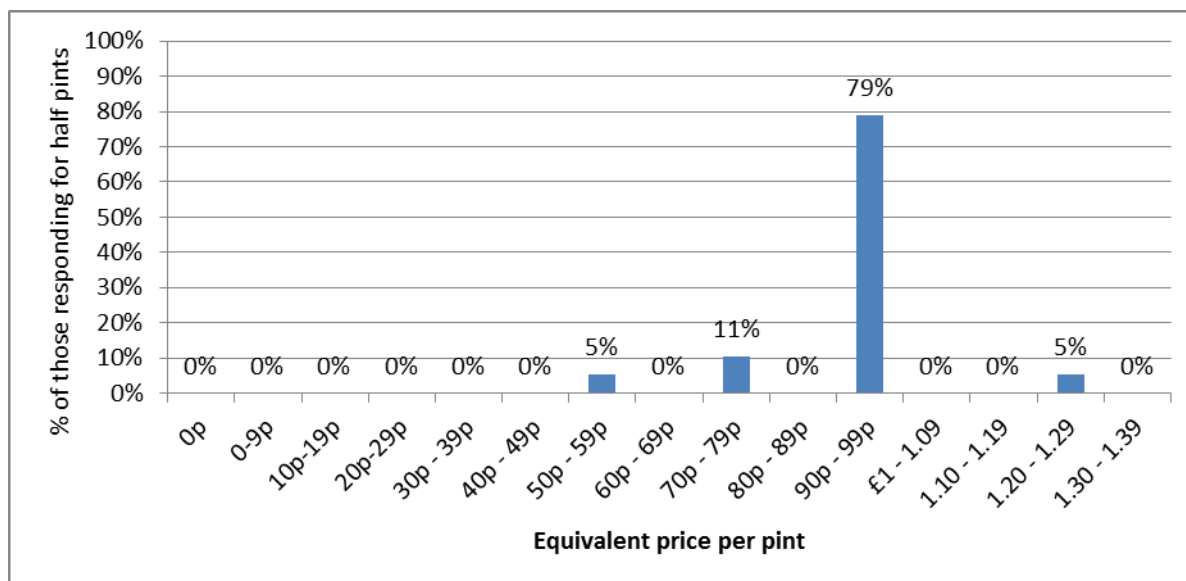
The 36 respondents who buy milk (or have it delivered) in 250ml sizes are broken down as follows:

Responses	Number of Respondents
Quoting prices in the 1/3 pint column	15
Quoting prices in the 250ml column	2
Quoting prices in the 1 litre column	2
Subtotal	19
Not known	17
Grand total	36

The majority of these have quoted a price in 1/3 pint units, and the raw average prices are as follows:

Average Prices (per pint)	
'Raw' average quoted price from 1/3 pint respondents	90.00p
'Raw' average quoted price from 250ml respondents	88.65p
'Raw' average quoted price from 1 litre respondents	75.29p
Overall 'raw' average	88.31p

The overall raw average in this group is slightly higher than that for the 1/3 pint groups: an equivalent price per pint of 88.31p. As before, there is a considerable spread across many different price brackets, as seen in the chart below.



The majority of these respondents (79%) buy in the 90p-99p price bracket.

Bulk sizes

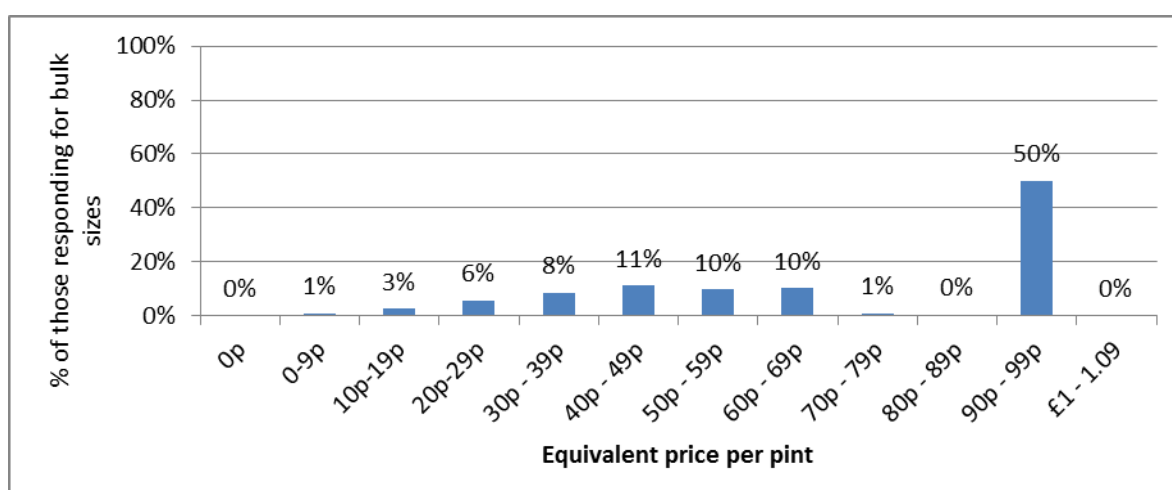
The 1386 respondents who buy milk (or have it delivered) in bulk sizes are broken down as follows:

Responses	Number of Responses
Quoting prices for 1 pint	196
Quoting prices for 1 litre	75
Quoting prices for 2 litre	95
Quoting prices for 4 litre	30
Quoting prices for 6 litre	11
Quoting prices in "other"	502
Subtotal	909
Not known	477
Grand total	1386

The raw average prices decrease across the various sizes of container, as follows:

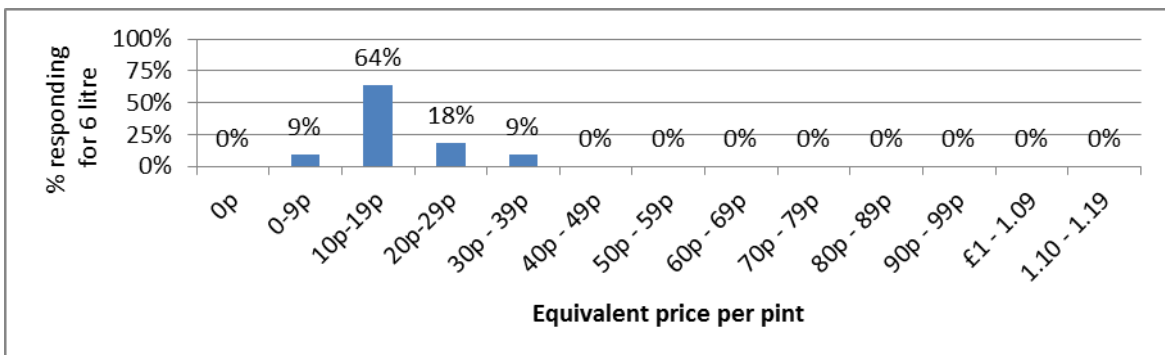
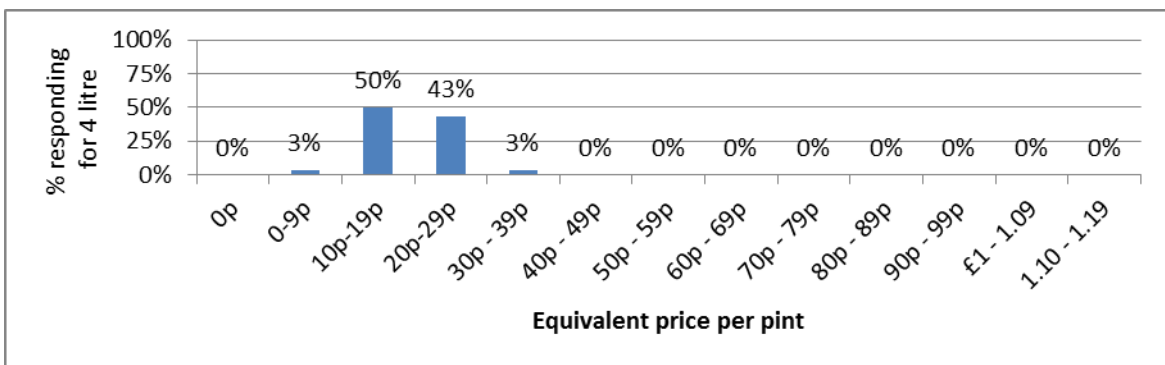
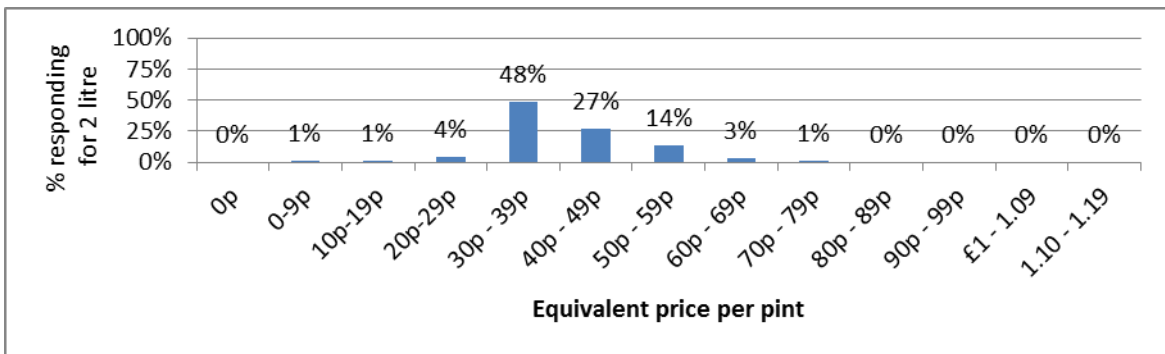
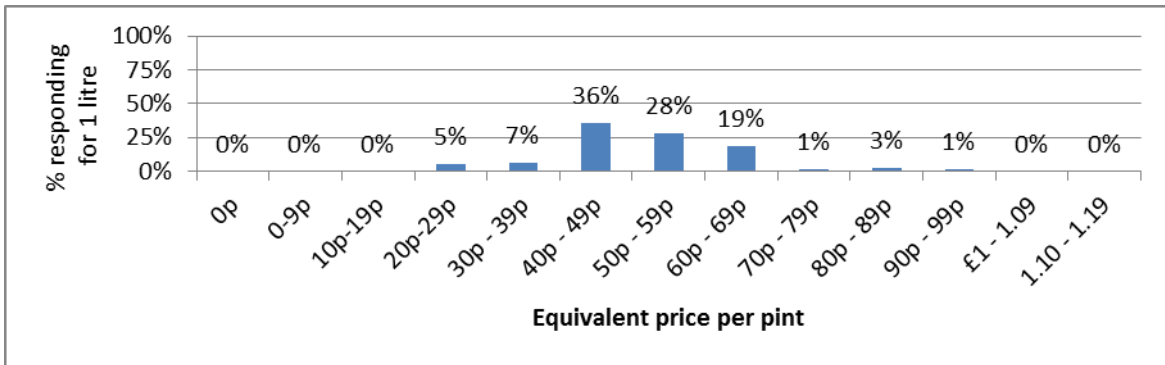
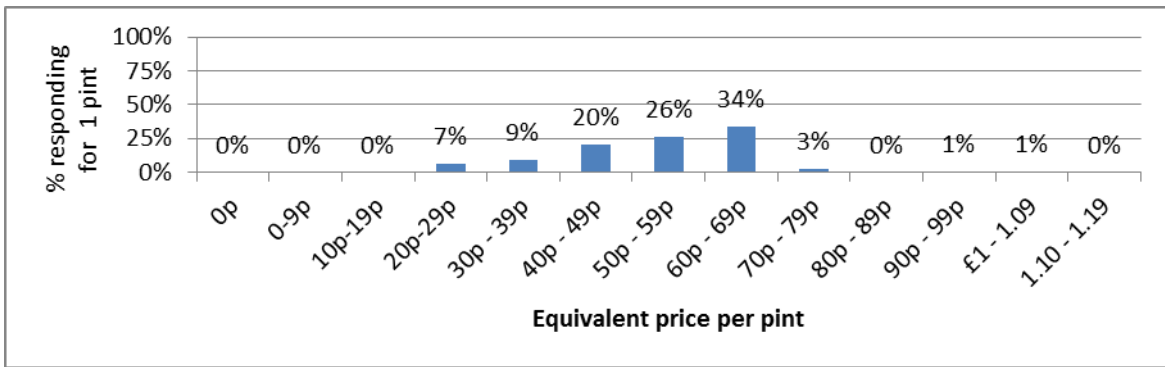
Average prices per pint	
'Raw' average quoted price from 1 pint respondents	53.15p
'Raw' average quoted price from 1 litre respondents	51.53p
'Raw' average quoted price from 2 litre respondents	41.28p
'Raw' average quoted price from 4 litre respondents	19.98p
'Raw' average quoted price from 6 litre respondents	18.39p
'Raw' average quoted price from 'other' respondents	85.32p
Overall 'raw' average	68.03p

The overall raw average in this group is an equivalent price per pint of 68.03p, split between the various price brackets as shown in the chart below.



It is immediately noticeable that there is a large group of respondents (50%) who have quoted prices in the 90p-99p price bracket (almost all of which are 90p), which appears expensive for milk purchased in bulk, especially in comparison to the other 50% of respondents that quote a wide range of price per pint equivalent. On examination, around 400 of prices in the 90p-99p range are childcare settings who say they *buy* milk in bulk container sizes, but *quoted prices* in the database column assigned for 1/3 pint units.

The charts below are further breakdowns of the data for milk purchased in bulk containers showing the spread by price band for milk bought or delivered in particular sizes (1 pint up to 6 litres). They clearly show that there is considerable variation in the equivalent prices paid for each individual size; but also a steady reduction in price as the sizes increase.



14) Any other comments about the Nursery Milk Scheme

Respondents' comments about the Nursery Milk Scheme are shown below, highlighting the main common themes that emerged from the analysis.

POSITIVE COMMENTS – 952 (90%)	Mentions
Good, successful scheme that works well	401
<i>Great / brilliant scheme – good idea</i>	162
<i>Very happy / satisfied with scheme – works well / no problems</i>	87
<i>Keep it / do not cut it / hate to lose it</i>	77
<i>Very helpful scheme / funding - grateful for the free milk</i>	23
<i>Easy to use / apply for and access / new online claims is good</i>	43
<i>Do not change it / keep it as it is</i>	9
Very beneficial for children	221
<i>Children benefit – nutritious drink / health</i>	96
<i>Encourages children to drink milk / children love the milk</i>	59
<i>It enables us (childcare setting) to provide milk to the children / could not provide milk without the scheme</i>	44
<i>Ensures disadvantaged children / in deprived areas benefit from milk</i>	22
Good, reliable service	181
<i>Reliable / good / brilliant service (unspecified)</i>	60
<i>Cool milk provides a very good service / very satisfied</i>	34
<i>Scotts provides a very good service / very satisfied</i>	31
<i>Convenient / handy scheme / service</i>	29
<i>Reliable delivery service</i>	27
Administration by 3rd party agents is very beneficial to settings	72
<i>Using an agent saves time / less administration</i>	67
<i>Using an agent helps our cash flow</i>	5
Other positive comments and suggestions	77
<i>Wish we could get free milk for over 5's / primary school children</i>	12
<i>Publicise the scheme more / provide more info how it works</i>	8
<i>We do not claim the full amount we could</i>	6
<i>Kids like the packaging / little cartons / Panda package</i>	5
<i>Allow alternative milks for children with lactose allergy / intolerance</i>	5
<i>Parents love the scheme</i>	4
<i>Childcare setting prefers to support local suppliers / dairy service</i>	3
<i>Other miscellaneous single comments</i>	34
NEGATIVE COMMENTS – 105 (10%)	105
<i>Confusing / complex administration process / reclaim problems, especially if numbers fluctuate</i>	20
<i>Milk delivery problems – wrong amounts / damaged containers</i>	16
<i>Some children cannot drink 1/3 pint so milk is wasted</i>	15
<i>3rd party milk agents overcharging</i>	15
<i>Coolmilk – delivery issues / dissatisfied with its service</i>	9
<i>1/3 pint not enough – parents / children would like more</i>	8
<i>Coolmilk – other problems and issues</i>	5
<i>Childcare provider cannot claim milk for her own child, but eligible if the child went to another childcare provider – discriminatory!</i>	4
<i>Repeated pressure from 3rd party agents to use their service</i>	2
<i>Confusing name 'Nursery' MS – unsure if a Playgroup entitled to it</i>	2
<i>Other miscellaneous problems / issues with NMS – single mentions</i>	9
Total mentions	1,057

Source - 1,022 survey respondents. 1,236 respondents did not answer question 14

704 (of the 1,022 people that responded to this question) provided 1,057 comments and views about the Nursery Milk Scheme, with 260 making more than one point. 306 respondents entered no / no comment. 1,236 survey respondents did not answer this question.

Note - Some findings in the following cross tabulation analysis (marked with the symbol '†') are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

Positive feedback - comments were overwhelmingly positive in nature (90% of 1,057 comments), which were made by 609 respondents (87% of 704 respondents that provided comments). The comments fall into four broad groups as follows:

- Good successful scheme that works well – 401 mentions (370 respondents / 53%)

This was mentioned slightly more frequently by childminders (243 resp./58%) and less by nurseries (57 resp./45%) and pre-schools (53 resp./48%). It was mentioned less frequently in Scotland† (24resp./38%) compared to England (333 resp./52%).

- Very beneficial for children – 221 mentions (189 respondents / 27%)

This was mentioned slightly more frequently by pre-schools† (34 resp./31%) and nurseries† (47 resp./27%) compared to childminders (92 resp./25%).

- Good reliable service – 181 mentions (171 respondents / 24%)

This was mentioned slightly more frequently by childminders (117 resp. / 28 %) compared to nurseries (20 resp. / 16%).

- 3rd party administration is very beneficial to settings – 72 mentions (71 respondents / 13%)

This was mentioned more frequently by pre-schools† (22 resp. / 20%) compared to childminders† (32. / 8%).

Negative feedback - 95 people (13% out of 704) mentioned dissatisfaction or problems with the scheme, making 105 comments. The most frequently mentioned issue was delivery problems (31 comments), followed by confusing, complex administration process which was especially difficult for settings with fluctuating attendance figures (20) and milk wastage because some children cannot drink 1/3 of a pint of milk (15) and 3rd party agents overcharging the Nursery Milk Scheme.

Commentary

Most people (87%) responding to the question have a very positive attitude towards the current Nursery Milk Scheme, perceiving it as a great, helpful, convenient scheme that works well and benefits children with a healthy nutritious drink. The scheme also has 3rd party agents available, that are generally very efficient and supportive, and using them minimises administration (allowing

childcarers, especially small ones) to devote more time to the children in their care and helps cash flow. However, some serious concerns are raised by 13% of the sample.

Some verbatim comments to illustrate respondents' opinions of the Nursery Milk Scheme

Childminder caring for 3 children, Wales. *"It's a good scheme- making sure the children are cared for"*

Independent pre-school, Scotland – *"Please do not stop it."*

Pre-school, employing less than 20 staff, England. *"Brilliant to have this scheme; it really helps."*

Childminder, 5 children, Scotland. *"It's great that children in my care get milk at least once a day from me, I wouldn't give them it if I didn't receive it from the nursery milk scheme."*

Childminder, Wales. *"It is not well-known enough- more childminders need to know about it. The administration-free service is beneficial."*

Childminder, registered to care for 3 children, Scotland. *"Very valuable service, thank you"*

Independent pre-school, England. *"I think it's an excellent scheme ensuring every child has its daily milk quota whatever background they come from. Milk is so important for health, growth and wellbeing."*

Childminder caring for 3 children, England, *"Using an agent saves on paperwork. never bothered before"*

Nursery, 44 children, England, *"It's a fantastic scheme that has ensured that every child has their quota of milk each day. We've no complaints with the service. It's well run and provides excellent quality and service."*

Childminder registered to care for 3 children, England. *"I have been a childminder for 30 years and have in the past claimed direct for milk provided to children. I found this system very tiresome and very time consuming so stopped claiming for the milk I provided to children. Once I saw the scheme advertised I thought it was a fantastic service and saved tremendous time on form filling and I am once again able to claim for the children's milk. I do hope that I will be able to continue to use this service"*

Small childminder, England. *"I hope something can be done to stop some milk supplying companies encouraging childminders to over claim. I also hope over inflated claims can be stopped. It would be a shame for the honest claimants to be penalised because of the less scrupulous ones"*

Childminder registered to care for 3 children England. *"I really like the Nursery Milk Scheme. I like the schemes flexibility as having low numbers it allows me to claim for what has been used out of the milk I buy. I have had phone calls recently from companies doing doorstep deliveries for childminders, I have pointed out that I prefer the Scheme because I only claim for what has been used and do not have to worry about having milk delivered for the children that I do not need and I will not be bullied into using their system"*

Nursery employing 21-50, England. *"I am very disappointed with our milk supplier as they have told me that I cannot claim milk from any other supplier. They have told me that I am in a contract with them for one year and when that ends I have to give them a further 3 months' notice to change my supplier. I find them an unsatisfactory company to do business with. The Nursery Milk Scheme should make it clearer to settings about how they can receive their milk and make sure that suppliers of milk do not tie settings in to contracts"*

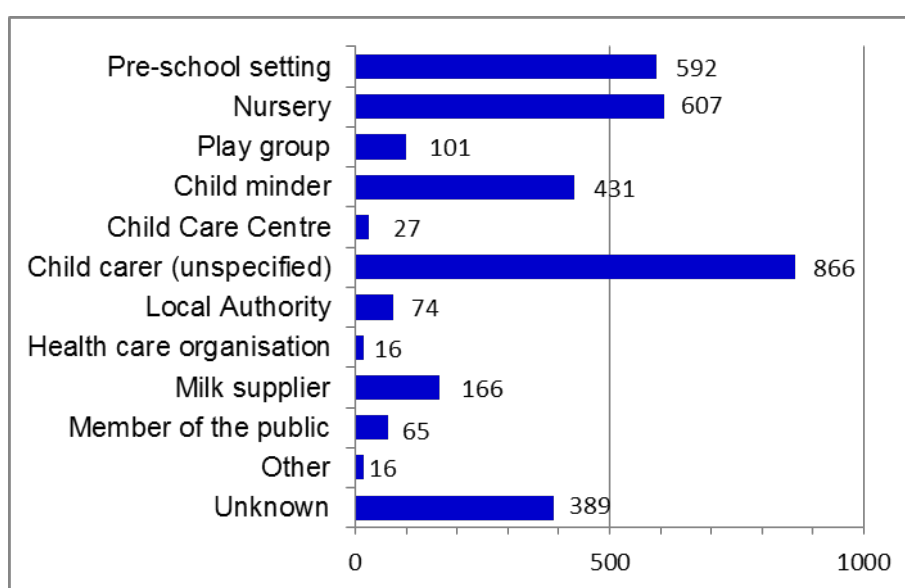
The above comments have been selected because they illustrate views about specific aspects of the Nursery Milk Scheme, which come alive using the respondent's verbatim

comments. However, readers should be aware that the number of positive comments in the database about the scheme greatly outnumber the negative concerns.

THE NURSERY MILK SCHEME CONSULTATION

Profile of the organisations that responded to the consultation

A total of 3,350 organisations responded to the consultation. 3,140 completed the online questionnaire, 166 organisations completed printed questionnaires downloaded from the Department of Health website, which were posted to the Department and a further 44 organisations sent email responses which comprised a mix of responses using the consultation questionnaire format, emails that stated views relating to specific elements of the consultation (mainly views on the 4 options). All these comments have been entered into the consultation database, the analysis of which is presented in this chapter of the report. The profile of the 3,350 organisations contained in the consultation database is as follows:



Notes

1. Pre-school includes charity / independent pre-schools, infant / primary schools, kindergarten
2. Nurseries also includes nurseries that are part of schools as well as independent nurseries
3. Playgroups includes independent playgroups and playgroups within schools
4. Childminders includes childminder organisations as well as individual childminders
5. Childcare Centres includes day care centres, and local authority children's centres
6. Milk suppliers mainly includes dairies / milkmen / milk suppliers, but also a few milk retailers
7. Members of the public includes all responses - 'not responding on behalf of an organisation'
8. Others – includes work / sports centre crèches, out of school clubs, holiday clubs
9. Health care organisation included some specialised in children's health as well as organisations involved in public health and healthcare generally.
10. Childcarers (unspecified). In the early phase of the consultation, the online survey did not ask for any details about the type of organisation. Following feedback from respondents, the online survey was amended to obtain this information. However, by this time many responses had been registered. Rather than analyse 1,451 responses with type of organisation 'Not answered', the research team carefully inspected comments made in the database and was able to identify 196 specific types of organisation (such as schools or nurseries). In addition, inspection of responses to questions designated for childcarers only and milk suppliers only, it was possible to identify 866 responses that were clearly made by childcare settings, although it was not possible to clearly identify what sort of childcare setting they were.

CONSULTATION QUESTIONS FOR OPTION 1

Q1.1 Do you think paying 92p for a pint of milk is a good use of public money?

Concerns expressed about the consultation questions

The introductory text prior to this question was as follows:

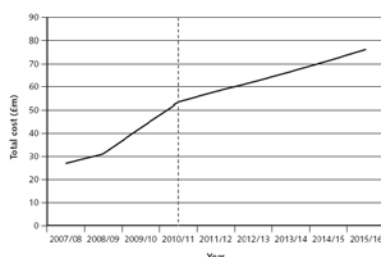
“Over recent years the prices claimed for milk supplied under the scheme have risen significantly, with some claims as high as 92p a pint. This has driven the total cost of the scheme up from £27m in 2007/08 to £53m 2010/11, and this trend looks likely to continue with costs potentially rising to £76m by 2016.”

The text in the consultation immediately preceding this question was as follows:

Option 1 – Do nothing

“If we do nothing, we believe that those supplying milk at a higher cost will continue to increase both their market share and the price per pint they charge, resulting in on-going increases in public expenditure.”

Figure 1: Past and future costs of the Nursery Milk Scheme



Several respondents considered question 1.1 to be extremely misleading, because it does not tell the consultation respondent that the average cost claimed per pint across the scheme is actually about 60p (ref DH impact assessment IA3053 16/11/2011), and several respondents thought this would have been more useful. Furthermore, the consultation document does not inform the reader of other factors / trends that have driven up cost, in particular the following: growth in the number of scheme participants during this time period; cost impact of 3^d party agents doing the claim administration on behalf of settings; the proportion of settings that use 1/3 pint (or similar sized) cartons. Most importantly, the question does not differentiate for views on a) delivered milk or b) milk purchased from retail outlets.

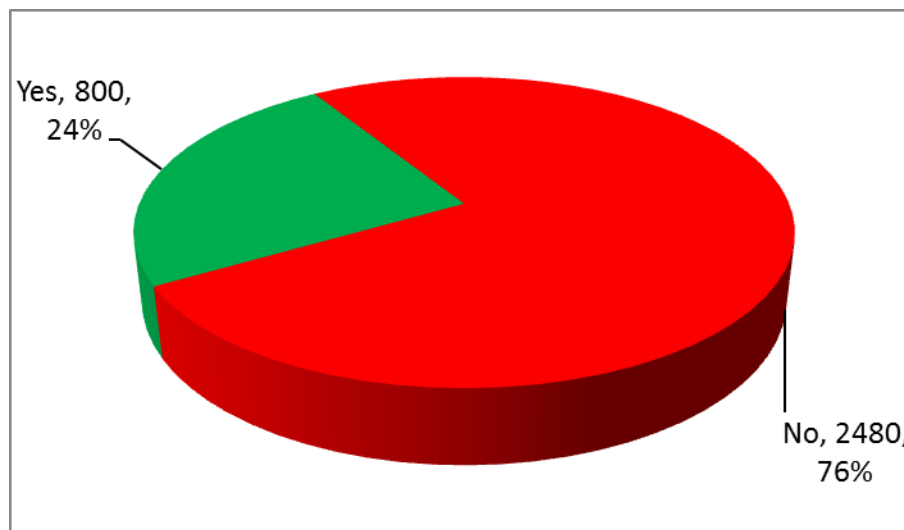
A NOTE OF WARNING

The research team does not know to what extent responses for question 1.1 (or other questions) may have changed if extra information had been provided. However, some of this information was not available when the consultation document was issued, and extra knowledge was sought in the childcare provider survey, the most relevant finding being that 54% of the milk purchased by survey respondents costs 90-99p (nearly all at the 90p price point). Furthermore, inspection of the survey responses revealed over 400 childcare settings that say they buy milk in bulk container sizes (1 pint to 6 litres) and charge the Nursery Milk

Scheme 90p or more per pint equivalent, most serving this milk in cups / feeding bottles.

Feedback to question 1.1

(Q1.1 Do you think that paying 92p for a pint of milk is a good use of public money?)



Source – 3,350 respondents of which 3,280 answered Q1.1, 70 did not answer

Note - Some findings in the following cross tabulation analysis (marked with the symbol ‘†’) are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population

800 respondents (24% of 3,280 that answered question 1.1) said they thought paying 92p for a pint of milk was good use of public money compared to 2,480 (76%) that did not. In most cases respondents did not clarify if they were referring to the cost of delivered milk or milk purchased from a retail outlet, or if they were referring to bulk containers of milk (i.e. 1 pint or larger) or 1/3 pint cartons.

Yes, 92p for a pint of milk is good use of public money.

The highest level of agreement was in childcare centres[†] (10 out of 27 - 37%), nurseries (30%) and pre-school settings (27%) compared to play groups (24%), childminders (24%), members of the public not responding on behalf of organisations (23%), childcare settings unspecified (22%), local authorities (21%) and milk suppliers (3%).

No, 92p for a pint of milk is not good use of public money

The highest level of disagreement was amongst milk suppliers (97%) compared to local authorities (79%), childcare settings unspecified (78%), members of the public (77%) and childminders (76%), play groups (75%), pre-school settings (73%), nurseries (70%) and childcare centres[†] (18 out of 27 - 67%).

Q1.1a If yes, please say why.

Reason why YES	Mentions
Guarantees children a healthy / nutritious drink providing essential vitamins and calcium (393 all children / 55 disadvantaged children)	448
Pays for the setting's or a 3 rd party's administration costs	88
Provides a fair price for farmers	88
Provides settings with a good delivered milk service	81
If that is what it costs, then so be it	34
Future health benefits for the children when they are adults	30
Helps sustain milkman delivery services / businesses	15
Money well spent / fair, good value for money	14
Small quantity portions / 1/3 rd pint cartons – cost more	10
Milk nutrition accelerates childrens' social skills and learning	9
Scheme / system that works well	4
Other miscellaneous	143
Total mentions	964

Source – 800 of the 3,280 respondents that answered Q1.1

754 of the 800 respondents that said yes to question 1.1 provided 964 reasons why (184 respondents giving more than one reason). The key reason was that it gives children a healthy nutritious drink (448 mentions – 14%) including 55 respondents specifically mentioning disadvantaged children from low income families, where their access to healthy food, including milk, may be limited. Other reasons were mentioned by 3% of the sample or less.

- Guarantees children a healthy / nutritious drink - 448 mentions (14%)

The frequency of mentions was highest in childcare centres[†] (8 out of 27 - 30 %), nurseries (20%), childminders (16%), local authorities (16%) and pre-school settings (15%), compared to play groups (13%), childcare settings unspecified (9%), members of the public not responding on behalf of organisations (9%) and milk suppliers (1%).

- Pays for the setting's or a 3rd party's administration costs – 88 mentions (3%)

The frequency of mentions was highest in pre-school settings (5%) and childcare settings unspecified (4%), and 2% or less for all other settings.

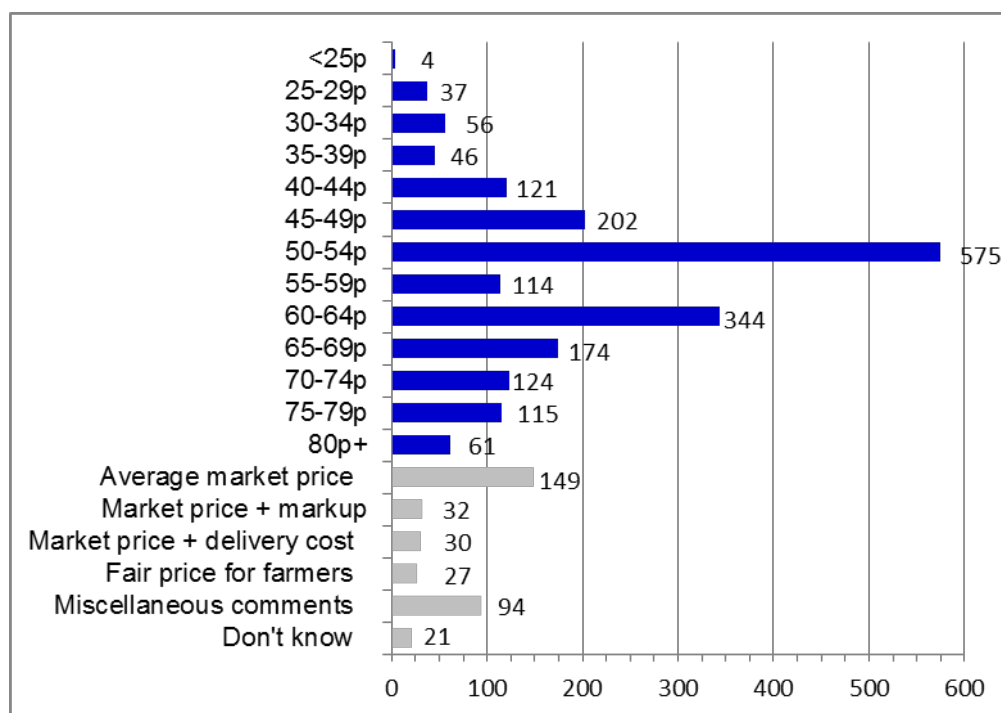
- Provides a fair price for farmers – 88 mentions (3%)

The frequency of mentions was highest for members of the public not responding on behalf of organisations (8%), nurseries (5%), play groups (4%), local authorities (4%) and childminders (3%), and 2% or less for all other settings.

- Provides us with a good delivered milk service - 81 mentions (3%)

The frequency of mentions was highest in pre-school settings (4%) and childcare settings unspecified (4%), and 2% or less for all other settings

Q1.1b If no, what do you think would be a reasonable price for the taxpayer to pay for a pint of milk?



Source – 3,280 respondents that answered question 1.1

1976 respondents suggested what they considered to be a reasonable price for the taxpayer to pay for a pint of milk (on the Nursery Milk Scheme), of which 466 (24% of those suggesting a price range) of the suggestions were below 50p. 689 respondents (35%) suggested prices ranging from 50p to 59p (of which 575 {29%} were in the 50-54p). 821 respondents (41%) suggested prices of 60p or higher, of which 344 (17%) were in the range 60-64p.

332 respondents gave other suggestions, the most frequently mentioned one being the average market price (149 mentions). Market price plus mark-up was mentioned by 32 respondents and comments indicated this was to cover delivery and / or administration costs - the suggested mark-ups being 5p (1 mention) 10p (1), 15p (1), 2% (1), 10% (4), 15% (1). Other suggestions were market price plus cost of delivery (30) and a fair price to farmers (27). Within the 94 miscellaneous, the most frequently mentioned comments were – best price / as low as possible (13), same as we pay now (6), free / no cost (5), at cost (5).

Price suggestions varied by type of organisation as follows:

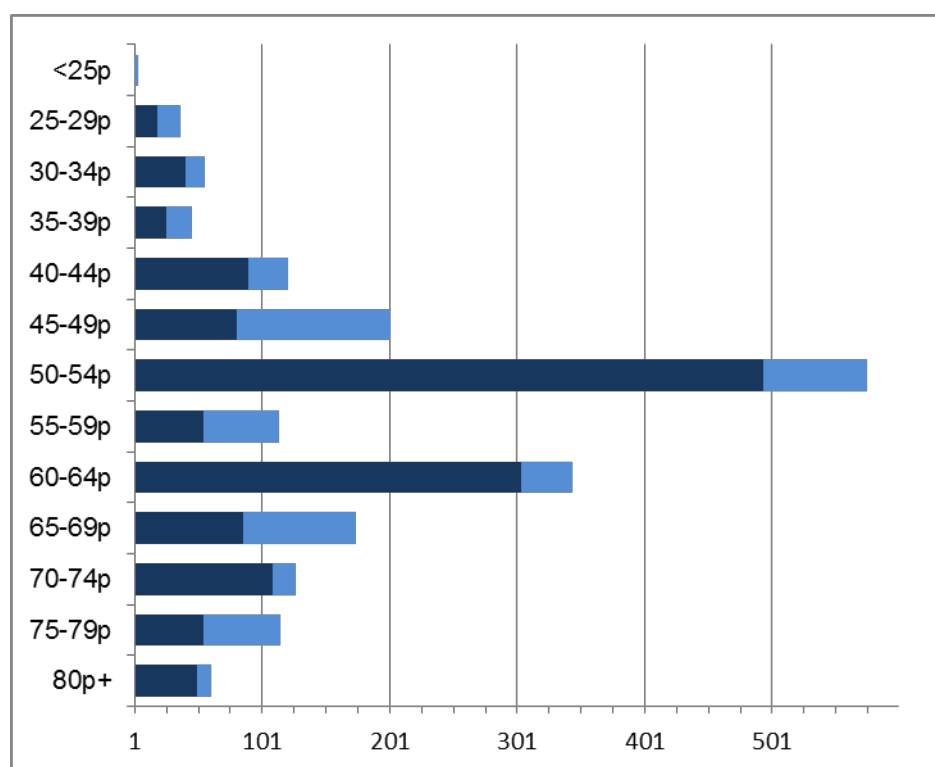
Less than 50p – average 14%, more frequently suggested by local authorities (23%), childminders (19%), nurseries (17%) and play groups (17%), compared to pre-school settings (14%), members of the public not responding on behalf of organisations (14%), childcare settings unspecified (10%) and milk suppliers (7%).

50-59p – average 21%, more frequently suggested by members of the public not responding on behalf of organisations (30%), local authorities (28%), play groups (27%) and childminders (24%) compared to pre-school settings (21%), nurseries (21%), childcare settings unspecified (19%) and milk suppliers (13%).

60-69p – average 16%, more frequently suggested by milk suppliers (27%), childminders (18%), childcare settings unspecified (18%), pre-school settings (15%) and nurseries (14%) compared to members of the public not responding on behalf of organisations (11%), play groups (9%) and local authorities (7%).

70p or more – average 9%, more frequently suggested by childcare settings unspecified (17%) and play groups (12%) compared to pre-school settings (8%), nurseries (6%), childminders (6%), local authorities (5%), milk suppliers (4%), members of the public not responding on behalf of organisations (3%).

Chart showing how price suggestions varied by type of comment



Legend ■ Prices at price points ■ prices in ranges

Source – 3,280 respondents that answered question 1.1

The above chart shows how the suggestions for a reasonable price for the taxpayer to pay for a pint of milk (given by the 1,976 respondents) varied by those that quoted a price on the 'price point' of the above ranges (i.e. 25p, 30p, 35p, etc.) compared to those that didn't. 71% of the suggestions were at the price points for each range and 29% comprised a mix of either a price range (e.g. 40-

45p or 50 to 60p) or specific prices in a price range not at a price point (i.e. 66p, or about 73p).

What respondents meant by 'a reasonable price'

Price range	PACKAGING SIZE		PURCHASE MECHANISM			ADMINISTRATION
	Large† container	1/3 pint container	Super-market	Local shop	Delivery cost	Administration charge
< 30p	12	0	11	0	0	0
30-39p	9	0	13	1	0	0
40-49p	4	0	15	5	0	0
50-59p	4	1	13	3	10	2
60-69p	2	6	2	3	38	3
70-79p	0	8	1	0	12	5
80p+	0	2	0	0	3	6
Total	31	17	55	12	63	16

†Notes

1. Large containers mostly referred to 4 pints (e.g. supermarket price of £1-£1.18 / 4 pints).
2. References to prices per pint have been excluded as these appear to be referring to cost of milk per pint equivalent and not necessarily milk in 1 pint containers.

Although over 90% of the respondents that suggested prices did not specify what the price related to, inspection of the database identified 150 respondents (7%) that gave a price or price range and also gave (unprompted) some additional comments (196 in total) that shed some light regarding what the price relates to.

48 of these comments included packaging size (large containers or 1/3 pints), 130 comments involved purchase mechanisms (buy from a supermarket / local shop or delivered milk) and 16 mentioned administration charges. A very clear pattern emerges.

Milk prices below 50p are all large containers (and not 1/3 pint cartons) purchased from retail outlets (87% supermarkets and 13 local shops).

Milk prices in the 50-59p range comprise a mix of purchase from retail outlets (60% - again mainly supermarkets plus some local shops), delivered milk (40%), plus 2 mentions of a small charge for administration costs. There were also four mentions of large containers and 1 mention of 1/3 pint cartons (18p for a 1/3 pint).

Milk prices in the 60-80p+ range were mainly for delivered milk (90%) compared to purchases from retail outlets (10%), where there were equal mentions of supermarkets and local shops. 89% of the comments referred to 1/3 pint containers compared to 11% that were for large containers (both being in the 60-64p range). There were 14 mentions of the price including administration charge (with several mentions of 3rd party agents such as Coolmilk).

CONSULTATION QUESTIONS FOR OPTION 2

Q2.1 In what range should the maximum price be set?

Many respondents gave views on what they considered the range should be for the maximum price set, but did not specify if it was for milk bought from a retail outlet or for delivered milk, and for the latter if the milk claim administration was carried out by a 3rd party agent.

For this reason, data in this section based on the full sample is not considered to be meaningful or reliable, and is considered unsafe for publication.

However, the findings do provide some useful insights, and a summary of the analysis can be found in appendix 1, although for the reason stated above, the findings should be treated with extreme caution.

Q2.2 What circumstances other than geographical isolation would affect childcare providers' ability to purchase milk at the normal market rate?

(Options - Lack of transport, Small number of children looked after, A long way from nearest shops, Special milk required for religious or cultural reasons, e.g. Kosher, Require single-serve packaging, Other – specify) Tick all that apply.

†Note – sample cell less than 50 respondents, and may not necessarily be statistically significant or representative of the relevant population

(PROMPTED) non geographical circumstances	Mentions
Lack of transport	1,853
A long way from nearest shops	1,555
Special milk required for religious or cultural reasons, e.g. Kosher	1,212
Small number of children looked after	1,091
Require single-serve packaging	1,058

(UNPROMPTED) - other circumstances mentioned	526
Impact on staff time / availability and hence staff child ratios	143
Staff member availability to shop around / go and buy milk / impact on staff child ratios	83
Time / time constraints / no time available	39
Unfair to childcare settings – it's not our (core) role to collect milk, it is caring / educating children	11
Logistics / personal time available to get milk with children in tow	10
Additional cost / financial implications	129
Extra costs involved / financial constraints	35
Staff time / vehicle / petrol / parking costs to collect milk	35
Extra administration time and costs	25
Additional costs for delivery	20
Extra cost incurred buying from local shop / retailer	7
Cash flow impact – time lag to get paid	7
Delivery preferred / collection has potential problems	89
Large number of children / large childcare setting / large quantities of milk	13
Convenience – it's better to have it delivered / inconvenient to have to go to shop each day to buy milk	40
Collecting and carrying large volume of milk (big settings) – its heavy / no door step parking	36
Collection preferred / delivery has potential problems	52
Limited refrigerated storage capacity for the milk (if milk delivered)	43
Transport of milk at appropriate / safe temperature	5
Delivery availability / reliability	4
Other circumstances	113
Dietary requirements / allergies / intolerances	35
Supporting local business / local milk providers	29
Organic / vegan milk / other milks (not allergy related)	5
Procurement procedures / restrictions	6
Miscellaneous other comments	38
Total mentions	526

Source – 3,096 respondents answered Q2.2. 194 did not answer plus 60 said none / no

3,096 respondents gave feedback on circumstances other than geographical isolation that could affect childcare providers' ability to purchase milk at the normal market rate.

Responses to the prompted options by type of organisation were as follows:

Response to five (prompted) non-geographical circumstances

- Lack of transport - 1,853 (60%)

The highest frequency of mentions was by milk suppliers (91%), childcare settings unspecified (64%) and nurseries (61%), compared to childcare centres† (14 of 25 - 56%), members of the public not responding on behalf of organisations (56%), pre-school settings (54%), play groups (54%), local authorities (50%) and childminders (45%).

- A long way from nearest shops - 1,555 (50%)

The highest frequency of mentions was by milk suppliers (94%), play groups (58%), childcare settings unspecified (54%), local authorities (54%) and childcare centres† (13 of 25 - 52%) compared to members of the public not responding on behalf of organisations (51%), pre-school settings (47%), nurseries (41%), childminders (41%).

- Special milk required for religious or cultural reasons - 1,212 (39%) -

The highest frequency of mentions was by milk suppliers (85%), followed by members of the public not responding on behalf of organisations (75%), childcare centres† (12 of 25 - 48%), local authorities (44%), nurseries (39%), play groups (38%), childminders (38%), childcare settings unspecified (35%) and pre-school settings (31%).

- Small number of children looked after - 1,091 (35%)

The highest frequency of mentions was by milk suppliers (93%), followed by childminders (46%), members of the public not responding on behalf of organisations (46%), childcare settings unspecified (35%), local authorities (33%), childcare centres† (8 of 25 - 32%), play groups (26%), pre-school settings (25%) and nurseries (19%).

- Require single-serve packaging - 1,058 (34%)

The highest frequency of mentions was by milk suppliers (82%), followed members of the public not responding on behalf of organisations (53%), by local authorities (46%), childcare centres† (10 of 25 - 40%), childcare settings unspecified (33%), pre-school settings (31%), nurseries (29%), play groups (27%) and childminders (27%).

Other circumstances mentioned (unprompted)

455 respondents mentioned 526 other circumstances (excluding the 5 prompted ones above) that could affect childcare providers' ability to purchase milk at the normal market rate (75 respondents mentioning 2 or more). These group into four broad themes, as shown below, together with how these responses vary by type of organisation

- Impact on staff time / availability, hence staff : child ratios - 143 mentions (5%)

The highest frequency of mentions was by childcare centres† (2 of 25 - 8%), followed by pre-school settings (6%), nurseries (5%), childcare settings unspecified (5%), childminders (3%), play groups (2%), local authorities (2%), milk suppliers (2%) and members of the public not responding on behalf of organisations (2%).

- Additional costs / financial implications - 129 mentions (4%)

The highest frequency of mentions was by pre-school settings (5%), nurseries (5%) and childcare settings unspecified (5%), followed by childcare centres† (1 of 25 - 4%), childminders (2%), local authorities (2%), members of the public not responding on behalf of organisations (2%) and milk suppliers (1%).

- Delivery preferred so collecting milk a potential problem - 89 mentions (3%)

The highest frequency of mentions was by nurseries (4%) and play groups (4%), followed by pre-school settings (3%), childcare settings unspecified (3%), local authorities (2%), members of the public (2%), milk suppliers (1%) and childminders (1%).

- Collection preferred so delivery has potential problems - 52 mentions (2%)

The highest frequency of mentions was by pre-school settings (2%), childcare settings unspecified (2%), local authorities (2%), members of the public not responding on behalf of organisations (2%), and nurseries (2%), followed by play groups (1%), childminders (1%) and milk suppliers (1%).

Commentary

Unfortunately, the question did not specify if circumstances that could affect childcare providers' ability to 'purchase milk' at the normal market rate applies to buying milk from retail outlets or having milk delivered. It is likely, but not certain, that most respondents interpreted this as applying to buying milk from retail outlets, as the two key circumstances mentioned are lack of transport and settings located a long way from nearest shops (60% and 50% respectively). The other main circumstance was special milks for religious or cultural reasons (39%). Bearing in mind that data from the survey indicates 70% of childcare providers have milk delivered, and only 11% serve special milks to children they care for, it would appear that the responses to this question related to respondents' 'perceptions' of circumstances that may exist in the population generally, rather than actual circumstances that apply to their own childcare setting.

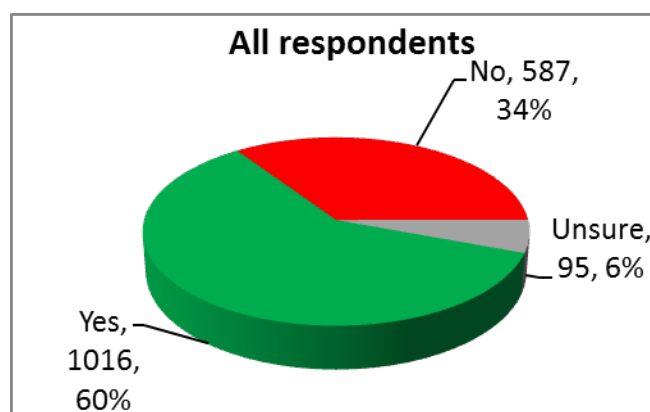
It is noticeable that the response rates by milk suppliers to all five prompted circumstances in this question was consistently and significantly higher than any other type of organisation - response rates ranging from 82% to 94% compared to 19% to 64% by all other organisations and only one mention higher than 64% by members of the public (75% for special milk). The Department of Health received a 'round robin' letter from a milk provider it had received from a 3rd party agent recommending how certain questions should be answered. For question 2.1, it recommended ticking all 5 boxes. 163 of the 166 responses by milk suppliers were on printed questionnaires that had been collated by the same 3rd party agent.

Inspection of the database shows 75% of the 163 questionnaires tick all 5 boxes. It is also unknown the extent to which the response in the database is therefore truly representative of the community of milk providers to which they belong.

Q2.3 Is there a risk that introducing a cap, even with the facility to vary the cap in special circumstances, would disadvantage specific population groups?

If yes, which population groups do you think would be disadvantaged, and why?

†Note – sample cell less than 50 respondents, and may not necessarily be statistically significant or representative of the relevant population



Source – 1,698 responses to Q2.3, 1,652 did not answer Q2.3

Population groups at risk	Mentions
Childcare settings	525
Childcare settings in rural / isolated areas	254
Small childcare setting - limited funds	52
Childcare settings in deprived areas	51
Small childcare settings (unspecified reason)	43
Childcare settings that lack transport to go and buy milk at lowest cost retail outlet / supermarkets	38
Childcare settings in areas where milk costs are high / above average	36
Childcare settings that require single pack servings	21
Charity based childcare providers	15
Childminders / childcare providers	10
Larger childcare settings	5
Families / children under 5	378
Children from disadvantaged / low income families	209
Children with dietary / special milk requirements / for allergies, cultural or religious reasons	102
All children / everyone	40
Children that do not get a balanced diet at home	27
Small / local businesses	57
Farmers	25
Milkmen / milk delivery organisations	24
Dairies	8
Others	160
Ethnic minorities	11
Miscellaneous other comments	149
Total mentions	1120

Sample – 1,698 respondents that answered Q2.3

587 (34% of those that responded to the question) respondents do not believe option 2 (introducing a price cap) would disadvantage specific population groups compared to 1,016 (60%) who think it would.

No, there is not a risk – 587 (34%)

506 of the 587 respondents either said no or cannot think of any, the other 95 respondents said no providing that certain criteria are met (which the respondent was assuming would be) in particular the cap was set a fair / realistic level and / or that it would be flexible to take into account different issues and circumstances.

Organisations that said no most frequently were members of the public not responding on behalf of organisations[†] (17 out of 34 - 50%), play groups (48%), local authorities[†] (21 out of 44 - 48%), and childminders (45%), compared to nurseries (39%), childcare settings unspecified (34%), pre-school settings (31%) and milk suppliers (4%).

Unsure – 95 (6%)

The main reason respondents were unsure was because they did not know what the terms and specifications of the cap option were.

Yes, there is a risk – 1,016 (60%)

83 respondents simply said yes but provided no further details, but 933 out of the 1,016 that said yes also gave 1,120 specific population groups that they considered could risk being disadvantaged by the introduction of a cap (160 respondents mentioning more than one population at risk).

Organisations that said yes most frequently were milk suppliers (96%), pre-school settings (62%), childcare settings unspecified (58%), and nurseries (56%), compared to members of the public[†] (17 out of 34 - 50%), childminders (49%), local authorities[†] (21 out of 44 - 48%) and play groups (46%). It is worth noting that all types of organisation perceive significant risks with this option (the lowest being 46% as high as 96%).

ANALYSIS OF THE KEY POPULATION GROUPS PERCEIVED TO BE AT RISK

The key population groups thought to be disadvantaged by the introduction of a price cap are analysed below, together with the most frequently mentioned suggestions by respondents how to mitigate these risks.

Childcare settings – 525 risks mentioned by 485 respondents (29%)

Consultation respondents mentioned 525 risks relating to childcare settings, and by implication the children that attend. The most frequently mentioned population group at risk was settings in rural or remote isolated areas (254 mentions), the two next most frequently mentioned being small childcare settings with limited funds (52) and settings in deprived areas (51).

43 consultation respondents mentioned concerns over small childcare settings (but no specific reasons why), 40 respondents mentioned childcare settings that lack transport to go and buy milk at lowest costs retail outlet / supermarkets, 36 mentioned childcare settings in areas where milk costs are high / above average.

Organisations that mentioned childcare settings (all risk groups) most frequently were members of the public not responding on behalf of organisations[†] (13 out of 34 - 38%), pre-school settings (33%), childcare settings unspecified (31%), compared to nurseries (28%), local authorities[†] (11 out of 44 - 25%), milk suppliers (23%), play groups (22%) and childminders (20%).

The main perceived risks to childcare settings posed by the introduction of a cap on milk prices and suggestions on how to mitigate them are analysed below.

- **Settings in remote isolated / rural areas** (254 mentions).

The majority of the risks mentioned were concerned with the higher cost of milk in remote, isolated or rural communities, either the cost of having milk delivered or the cost of purchasing milk in a local shop (the alternative being to spend more money on petrol to get to a supermarket to buy milk at a lower price). Both risks are linked to concerns of the potential non-availability of readily accessible milk below the price cap level, the first one associated with delivery service, because it is thought that many milk deliverers would not consider it worthwhile / financially viable to deliver to remote, inaccessible childcare settings, especially small settings requiring only small volumes of milk.

Suggestions on how to mitigate

- Allow for exceptions with flexible / variable cap for special circumstances in rural areas (45)
- Adopt a universal cap high enough to cover all locations, some also mentioned other costs such as delivery and administration (27)
- Use local milkmen to deliver (14)
- Continue as we are (10), do not introduce a cap (3) – total (13)
- Set up deals with local retail shops (6)
- Flexibility for settings to buy themselves and reclaim (5)
- Provide free delivery (2), deal with local farmers (2), milk vouchers (2), other miscellaneous single suggestions (35)

- **Small childcare setting - limited funds** (52 mentions).

The main area of concern is that many small groups, especially charity run groups, have little or no extra funds to finance the cost of milk if the cap price is lower than the cost to buy it / to have it delivered, and they may have to restrict or stop giving milk to the children they care for.

Suggestions on how to mitigate

- *Set realistic cap level to take account of cost of delivery / administration and index link / revise regularly (5)*
 - *Retain present system, including 3rd party administration / do not introduce a cap (5)*
 - *Grant system or extra funding (4)*
 - *A National or LA arranged contract to fix the price for delivered / collected milk (3)*
 - *Other miscellaneous suggestions (12)*
- **Childcare settings in deprived areas** (51 mentions).
 Most of the risks mentioned related to childcare settings in deprived areas operating on limited budgets / tight margins and would therefore struggle to pay any top-up if the cap was lower than the price they have to pay for milk. As a result they may be unable to provide the milk to children or may have to provide less milk, the alternative being that they would have to ask the parents to pay the difference, which settings believe would have little or no chance of happening as many parents in deprived areas are on low incomes or benefits and would not be able to afford to pay.
Suggestions on how to mitigate
 - *More government support / subsidies for people on low incomes (5 mentions)*
 - *Ensure milk is provided free to all children from low income / deprived families (4)*
 - *Ensure milk is provided free to all children under 5 / carry on as we are (4)*
 - *Ensure milk is set at a fair / reasonable price (2), flexible cap level for settings in deprived areas (2), other miscellaneous suggestions (8)*
 - **Small childcare settings - unspecified reason** (43 mentions).
Suggestions on how to mitigate
 - *Unrestricted additional subsidy rate - but need for proof to spend the extra (8)*
 - *Sliding scale cap depending on provider size / numbers (4)*
 - *Make cap fair to take issues into account (4)*
 - *No change / keep present scheme (2), other miscellaneous suggestions (13)*
 - **Childcare settings that lack transport to go and buy milk at lowest cost retail outlet / supermarkets** (38 mentions).
 The main risk concerns childcare settings which rely on delivered milk because they lack staff with any transport to go out and buy milk. Some also mentioned it was cheaper to have it delivered than paying staff to go and buy milk and four respondents said there were no retail outlets nearby.
Suggestions on how to mitigate
 - *All milk delivered – better control of cost for the setting (7)*
 - *A flexible cap to allow setting choice and subsidise providing can prove cost (5)*
 - *Use Local Authorities or consortia or specialist 3rd party agencies to buy milk in bulk (3)*
 - *Other miscellaneous suggestions (8)*
 - **Childcare settings in areas where milk costs high / above average** (36 mentions).
 The main risk mentioned by most was that higher prices for milk are paid in certain areas, especially rural areas, or only local shops are located near to the setting and it is not viable to buy low cost milk in small quantities as available in a supermarket. Seven respondents also stated that the standard of living varies in different areas.
Suggestions on how to mitigate

- *Contracts with Local Authorities or milk suppliers on bulk purchased milk to benefit from economies of scale (5)*
- *Regional capping for areas where milk price is above regional average (5)*
- *Flexibility to allow claims for higher prices in special circumstances (4)*
- *A standard price for all outlets / regions (3), Make sure price of milk is well monitored (2), other miscellaneous suggestions (8)*

- **Childcare settings that require single pack servings** (21 mentions).

About a third of the comment concerning the nature of the risk were concerns that the cap would not be high enough to cover the cost of 1/3 pint cartons, especially if delivered, and two thirds of the comments reflected concerns that 1/3 pint cartons would not be permitted under a capped price scheme which would seriously inconvenience certain childcare settings (because they avoid spillage / wastage, they are easier to serve to children and these cartons encourage children to drink milk).

Suggestions on how to mitigate

➤ *Eleven miscellaneous suggestions each addressing a single specific risk*

- **Charity based childcare providers** (15 mentions).

Nearly all the risks concerned the cap being set too low (i.e. below the rate of purchased or delivered milk) and charity childcare providers work on very tight, restricted budgets and would not be able to afford to pay the extra cost to buy the milk for the children in their care.

Suggestions on how to mitigate

➤ *Charities should be exempted or provided with a grant (2)*

➤ *Health & Safety implications if staff ratios affected while staff go to buy milk (2)*

➤ *Other miscellaneous suggestions (5)*

- **Childminders / childcare providers** (10 mentions).

Two main risks were identified – settings being liable for the additional cost but they are already struggling to make ends meet, and some childminders / care providers may not get their entitlement to the milk and their children would suffer.

Suggestions on how to mitigate

➤ *Ensure setting gets a regular delivery, as they must provide the milk (2)*

➤ *Milk vouchers or top-up cards (2)*

➤ *Other miscellaneous suggestions (2)*

Children under 5 years old and their families 378 risks mentioned by 372 respondents (22%)

Two main groups of children under 5 were thought to be at risk – children from disadvantaged / low income families (209 mentions) and children with dietary / special milk requirements / for allergies, cultural or religious reasons (102). 40 respondents said all children under 5 years old, mainly because they feel all children are entitled to receive their daily milk allowance and 27 respondents mentioned children that do not get a balanced diet at home.

Organisations that mentioned children under five and their families most frequently were members of the public not responding on behalf of organisations[†] (13 out of 34 - 38%), childcare settings unspecified (31%), pre-school settings (25%), local

authorities[†] (11 out of 44 - 25%), and nurseries (24%), compared to childminders (20%), play groups (17%) and milk suppliers (3%).

The risks relevant to each population group at risk and suggestions on how to mitigate them are analysed below.

- **Children from disadvantaged / low income families** (209).

The main risks to children from disadvantaged / low income families mentioned by respondents related to concerns that many of these children lack good quality food at home and / or do not get enough (or possibly any) milk at home because their parents cannot afford it. The introduction of an unacceptably low cap could result in settings being unable to provide these children with their daily free milk, which is seen as providing them with at least one good healthy drink each day that has strong health benefits. Several respondents also said that parents of children in disadvantaged / very low income families would not be able to afford to pay any cost shortfall.

Suggestions on how to mitigate

- *Ensure milk is provided free to all children under 5 / carry on as we are* (35)
- *Ensure milk provided free to all children from low income / deprived families* (13)
- *Milk token / voucher scheme or milk credits* (11)
- *Use data to identify parents on benefits* (7)
- *Flexible higher cap level for settings in deprived areas* (5)
- *Government support / subsidies for people on low incomes* (4), *do not introduce the cap scheme* (2), *other miscellaneous suggestions* (25)

- **Children with dietary / special milk requirements / for allergies, cultural or religious reasons** (102 mentions).

The main types of reason mentioned were religious – Kosher milk being mentioned specifically 12 times (43 mentions), Special dietary milk – no further details (41), cow's milk allergy / intolerance / other medical reasons (31), cultural reasons (27), and prevention of tooth decay – fluoride milk (1). The specific milks mentioned in association with the above were Kosher milk (12 times), soya milk (12), goats milk (6), organic milk (2), fluoride milk (1), sheep's milk (1) and rice milk (1). Where mentioned, cost was the key concern as specialist milks usually cost more than normal cow's milk (comments ranging from 10% to 'a lot more') and the cap would restrict how much the setting would be reimbursed. A few respondents also said that most of the specialist milks are not allowed by the current scheme, which disadvantages children that need them for the reasons given above.

Suggestions on how to mitigate

- *Flexible system to allow claims for full cost of all special milks* (27)
- *Introduce a sliding scale cap / tariffs for specialist milks* (17)
- *Parents or settings bear the cost or provide themselves* (6)
- *Widen the list of allowed milks / current list is restrictive* (4)
- *No cap / keep system as it is* (2), *other miscellaneous suggestions* (12)

- **All children under 5** (40 mentions) – because all entitled to receive free milk.

Suggestions on how to mitigate

- *Carry on with scheme as it is / milk provision should not be stopped* (5)
- *Review and set prices to cover all costs* (5)

- *Do not introduce a cap (4 mentions)*
- *Organise discussions between Government, childcare providers and milk suppliers to plan a way forward re prices / carton sizes, etc. (2), cut out middlemen (2), other miscellaneous suggestions (8)*
- **Children that do not get a balanced diet at home** (27 mentions).
The main risk concern is that a low price cap may affect childcare settings to provide milk to their children, which would be more serious for children that do not get a balanced diet at home, because at least they get a healthy drink of milk once a day.
Suggestions on how to mitigate
 - *Continue with the scheme as it is (7)*
 - *Cap should be realistic (based on a formula rather than fixed price) and be reviewed (2). Use supermarkets – they have lower prices, but it needs to be easier to receive milk from this source (2), Other miscellaneous suggestions (4)*

Small / local businesses – 57 risks mentioned by 50 respondents (3%)

Two main groups of small local businesses were thought to be at risk – farmers (25 mentions) and small, local milk delivery providers / milkmen (24 mentions). Organisations that mentioned small/ local businesses most frequently were play groups (6%) and pre-school settings (4%) compared to nurseries (3%), members of the public[†] (1 out of 34 - 3%), childcare settings unspecified (2%), childminders (1%), milk suppliers (1%), and local authorities[†] (0%). Risks relevant to these two groups and suggestions on how to mitigate them are analysed below.

- **Farmers** (25 mentions).
Nearly all the comments concerning the risk to farmers revolved around large suppliers and supermarkets taking high profits and buying milk from farmers at an unacceptably low, unprofitable price, which could result in some farmers going out of business and workers losing their jobs.
Suggestions on how to mitigate
 - *Ensure farmers / milk producers get a fair price (4)*
 - *Set realistic, sustainable price cap (3) set a standard price for milk from producers all must pay - including supermarkets (2), Other miscellaneous (7)*
- **Milkmen / milk delivery organisations** (24 mentions).
The main risk concerned the cap not covering the cost of delivery, and milkmen would lose business as milk would be bought from local supermarkets, contributing towards some milkmen going out of business / losing their job.
Suggestions on how to mitigate
 - *Settings should be able to buy from local suppliers (4 mentions)*
 - *Set a realistic price cap (4), other miscellaneous suggestions (5)*

Other populations at risk – ethnic minorities 11 risks mentioned by 11 respondents (0.6%)

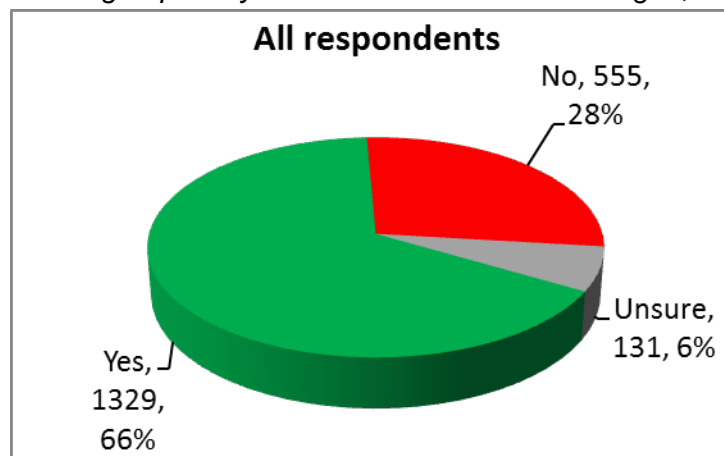
One other group thought to be at risk was ethnic minorities (11 mentions). Four respondents simply stated 'ethnic minorities', 3 respondents linked ethnic minority populations being socially disadvantaged / on low income.

- **Ethnic minorities (11).**
Suggestions on how to mitigate
 - *Miscellaneous suggestions (3)*

CONSULTATION QUESTIONS FOR OPTION 3

Q3.1 Is there a risk that introducing an e-voucher card would disadvantage specific population groups?

If yes, which population groups do you think would be disadvantaged, and why?



Source - 2,015 respondents answered Q3.1, 1,335 did not answer

POPULATION GROUPS AT RISK	Mentions
Childcare settings	1199
<i>Settings that do not have internet access / do not have IT literate staff</i>	310
<i>Adds administration / management time e-voucher complex to use / too much hassle</i>	233
<i>Settings – ready availability of local store that takes e-voucher (including 74 references to settings in rural / isolated areas)</i>	172
<i>Settings – days open and number of children attending vary daily / week to week</i>	120
<i>Settings – availability of local milkman / delivery service that takes e voucher (including 24 references to settings in rural / isolated areas)</i>	92
<i>Settings – lack of transport available to collect milk from milk retailer / supplier</i>	35
<i>Settings – lack staff available to go and collect milk from milk retailer / supplier</i>	34
<i>Settings with children with special dietary / religious / special milk needs</i>	17
<i>Settings – cost of staff time to go and collect milk from milk retailer / supplier</i>	16
<i>Settings in areas where milk prices are high</i>	13
<i>Settings run by poorly educated / illiterate people – too complex for them</i>	13
<i>Miscellaneous - settings in rural / isolated areas (generally)</i>	69
<i>Miscellaneous – settings' access to suppliers (type unspecified) taking e-voucher</i>	32
<i>Miscellaneous - childcare settings (13) / small settings (30) no reasons given</i>	43
Small / local businesses	184
<i>Small local business – milk delivery providers / milkmen</i>	109
<i>Local dairies / milk producers</i>	28
<i>Small local retail businesses – milk providers</i>	25
<i>Local businesses / local suppliers unspecified</i>	22
Poor / disadvantaged people / children	61
<i>Poor / disadvantaged people (no reason given)</i>	36
<i>Disadvantaged families / people in deprived poverty areas – no access to internet (by their childcare setting) or low computer literacy</i>	25
Government / Local Government	30
<i>Local authorities – added administration costs</i>	15
<i>Government – system open to abuse / over claiming</i>	15
Ethnic minorities	11
<i>Ethnic groups that speak poor / no English</i>	11
Miscellaneous other comments	130

Total mentions	1,615
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555 (28% of those that responded to the question) respondents do not believe option 3 (introducing an e-voucher card) would disadvantage specific population groups compared to 1,329 (66%) who think it would.

No, there is not a risk – 555 (28%)

491 of the 587 respondents either said no or cannot think of any risks, although a few thought it was a great idea and could work well (23 mentions), it could stop abuse over claiming milk numbers (11), everyone can access the internet – libraries and internet cafes (8) and no but it would add a little extra administration for the childcare setting. The other 64 respondents said no providing that certain criteria are met (which the respondent was assuming would be) in particular that there were extensive outlets and suppliers conveniently available (17 mentions), provided local dairies / suppliers / delivery organisations are involved (15) and provided it is run and administered properly (9).

Organisations that said no most frequently were childminders (38%) and local authorities[†] (17 out of 46 - 37%) compared to nurseries (34%), pre-school settings (29%), members of the public[†] (13 out of 45 - 29%), play groups (27%), childcare settings unspecified (21%) and milk suppliers (2%).

Unsure – 131 (6%)

The main reason respondents were unsure was because they were unsure how the scheme would work (24 mentions), with only a few unsure if local milkmen would be involved / available (7), if it would involve excessive administration (6), if they would need to pay more for the milk (6) or if they could buy their milk from the local shop (5).

Yes, there is a risk – 1,329 (66%)

211 respondents simply said yes and provided no further details, but 1,118 out of the 1,329 that said yes also mentioned 1,615 specific population groups that they considered could risk being disadvantaged by the introduction of an e-voucher card (278 respondents mentioning more than one population at risk).

Organisations that said yes most frequently were milk suppliers (97%), childcare settings unspecified (73%) and members of the public[†] (31 out of 45 - 69%) compared to play groups (66%), local authorities[†] (29 out of 46 - 63%), pre-school settings (63%), nurseries (58%) and childminders (55%). It is worth noting that at least 50% of every type of organisation thought that the e-voucher would disadvantage specific population groups.

ANALYSIS OF THE KEY POPULATION GROUPS PERCEIVED TO BE AT RISK

The key population groups thought to be disadvantaged by the introduction of an e-voucher card are analysed below, together with the most frequently mentioned suggestions by respondents how to mitigate these risks.

Childcare settings – 1,199 risks mentioned by 955 respondents (47%).

Consultation respondents mentioned 1,199 risks relating to childcare settings, and by implication the children that attend. The most frequently mentioned risk was that many settings do not have access to the internet or their staff are not sufficiently IT literate to operate an e-voucher system (310 mentions), followed by settings incurring additional administration / management time to operate an e-voucher system which is perceived as complex to use / too much of a hassle (233). 172 respondents mentioned concerns over readily accessible local stores that would have the e-voucher facilities (of which 74 were also linked to settings in rural / isolated areas) and difficulties for settings open different days of the week and / or where the number of children can vary from day to day, week to week (120).

In addition, 92 respondents mentioned concerns over the availability of local milkmen / milk delivery services that could take the e-voucher (of which 24 were linked to rural / isolated areas). Two other risks to childcare settings with a significant number of mentions were lack of transport to go and collect milk (35) and lack of staff available to go out and collect milk from a milk supplier, many also adding that this would affect child to carer ratios (34 mentions).

The perception of risk to childcare settings was fairly even across the different types of organisation. The main perceived risks to childcare settings posed by the introduction of an e-voucher card and suggestions on how to mitigate them are analysed below.

- ***Many settings do not have access to the internet or IT literate staff*** (310).
Suggestions on how to mitigate
 - *Paper vouchers – either posted or collect at post office as alternative* (33)
 - *Avoid e-vouchers / keep the present system as it is* (23)
 - *Provide an alternative solution – in parallel to the e-voucher* (19)
 - *Fund the technology / provide a laptop* (9)
 - *Provide alternative access to computer or internet, e.g. at library, local school or internet café* (8)
 - *E-voucher goes direct to milk provider, who then delivers milk required* (7)
 - *Have phone activated vouchers as an alternative* (7)
 - *Simplify the e-voucher system – keep administration very simple* (5)
 - *Offer chip and pin / debit card / gift card to use in retail outlets* (3)
 - *Avoid e-vouchers / keep the present system* (2)

- *Other miscellaneous suggestions (16)*
- **Increased setting administration and management time** due to complexity of e-voucher which some respondents also perceive as too complex / too much hassle (233).
Suggestions on how to mitigate
 - *Avoid e-vouchers / keep the present system as it is (39)*
 - *Make the system as easy and simple as possible, especially for low academic achievers (9 mentions)*
 - *Deal direct with dairy to supply milk who would claim on behalf of setting (5)*
 - *Leave current system as it is but apply a price cap (5)*
 - *Retain 3rd party agent or Coolmilk to do the administration (3)*
 - *Notify milk figures on a quarterly or termly basis (2)*
 - *Other miscellaneous suggestions (13)*
- **Settings may not have ready access to local retail outlet that takes e-voucher** (172 mentions, which includes 74 references to settings in rural / isolated areas).
Suggestions on how to mitigate
 - *Ensure a wide / sufficient range or all retail outlets accept e-vouchers (25)*
 - *Allow for delivered system / involve dairies and milkmen (11)*
 - *Flexibility to allow setting choice of how to source milk / alternative ways how to be reimbursed (9)*
 - *Keep current system / do not change (12). Do not introduce e-vouchers (8), other miscellaneous (14)*
- **Some childcare settings opening days vary and numbers attending vary** from day to day, week to week, during holidays (120 mentions).
Suggestions on how to mitigate
 - *Avoid e-vouchers / keep the present system as it is (9)*
 - *Advise number more frequently e.g. monthly or weekly basis (7 mentions)*
 - *Provide emergency telephone hotline or online service to alter orders (5)*
 - *Voucher top-ups / adjustments on retrospective reports (5)*
 - *Provide e-vouchers based on maximum capacity (4)*
 - *Pay on average numbers / approximate numbers basis (3)*
 - *A flexible / sensitive system (2), make system as simple / easy as possible (2), leave current system alone but apply a price cap (2), other miscellaneous (8)*
- **Settings may not have ready access to local milkman / delivery service that takes e-voucher** (92, including 24 references to settings in rural / isolated areas).
Suggestions on how to mitigate
 - *Allow flexibility with options / choices where / how setting buys milk e.g. shop (6)*
 - *Ensure e-voucher is accepted by all / as wide a range as possible of milk supplies – big and small (6)*
 - *Do not introduce e-vouchers (5), keep the current system (4), miscellaneous (4)*
- **Childcare settings that lack transport to go and collect milk** from retailer or milk supplier (35 mentions).
Suggestions on how to mitigate
 - *Pay for delivered milk / continue with delivered milk (10)*
 - *Keep the current system / do not change (4), miscellaneous (3)*

- **Childcare settings that lack staff available to go and collect milk** from retailer or supplier which could seriously affect child : carer ratios (34 mentions).
The main concern, especially amongst small settings, is the lack of staff to go out and buy milk without jeopardising staff : children ratios. A couple of respondents also said it was their job to teach / care for children not to go shopping for milk.
Suggestions on how to mitigate

 - Include an allowance for milk to be delivered (8)
 - Keep the current system / do not change (6), miscellaneous (1)
- **Settings with children with special dietary / religious or other reasons for special milk needs** (17 mentions).
The main risks are either that settings with special milk requirements would not be eligible for the scheme or that they would only be partially reimbursed as special milks usually cost more than standard milk. The main groups affected by this mentioned by respondents were religious / kosher groups (7 mentions), special needs (7), medical requirements / allergies (3), lifestyle / organic milk (3), cultural (2) and ethnic groups (2)
Suggestions on how to mitigate

 - Include an allowance / incentive for special milks (5 mentions), include a range of suppliers that can supply special milks (3), keep current system (2), misc. (2).
- **Additional setting staff time costs incurred** through them having to go out and collect milk (16 mentions).
Key risk mainly relates to having to pay staff, sometimes out of normal work hours, to go and buy milk, with one respondent adding that would involve travelling further to a supermarket with low milk prices if they were not able to buy milk at their local shop.
Suggestions on how to mitigate

 - Pay for the cost of collection or the delivery charge (3), keep the current scheme (2), miscellaneous (2)
- **Settings in areas where milk prices are high / above national average** (13).
Most respondents stated settings in areas where milk prices are above average, and hence would not be prepared to buy the milk unless they were fully compensated, hence the children would miss on free milk, but did not give any examples where. However, two respondents said rural areas and one said London.
Suggestions on how to mitigate

 - Continue as we are / do not change (3), flexibility in the milk price levels allowed (2), miscellaneous suggestions (3)
- **Settings run by poorly educated / illiterate people** – the e-voucher system could be too complex for them to manage it (13 mentions).
Two groups mainly at risk were people with low literacy / numeracy skills and people with English as an additional / second language, but also included a mention of people with learning difficulties. Most references were of childcarers, and the main concern is that they would not be able to understand the e-voucher concept or how / where to access it, hence the children in their care would miss out on free milk. A few respondents also mentioned parents with poor education / low literacy skills.
Suggestions on how to mitigate

- Five respondents gave 5 different suggestions, the most relevant being make the system as simple as possible (1) and more education (1)

Small / local businesses – 184 risks mentioned by 161 respondents (8%).

Three main groups of small local businesses were thought to be at risk – small, local milk delivery providers / milkmen (109 mentions), local dairies / milk providers (28 mentions) and local retail businesses (25 mentions).

Organisations that most frequently mentioned small, local businesses as a population at risk were milk suppliers (70%), compared to childcare settings unspecified (7%), nurseries (4%), play groups (4%), members of the public[†] (2 out of 45 - 4%), pre-school settings (3%), childminders (1%) and local authorities[†] (0%).

The risks relevant to each and suggestions on how to mitigate them are analysed below.

Small local milk delivery providers/ milkmen (109 mentions).

The main risk to small local milk providers / milkmen is that they lack the technology or might be unwilling / lack the finances to install the technology to take e-vouchers and would therefore lose business by not participating in the nursery milk scheme (89 mentions). Eight respondents also thought that small milk delivery providers / milkmen would lose out to large dairies / supermarkets, mainly because they would not be able to compete on prices. Suggestions on how to mitigate the main risks are summarised below.

- Small milk suppliers / milkmen would lack the technology or be unable to invest in the technology to take e-vouchers and hence lose businesses (89).
 - Mitigate – Carry on with current scheme (6), apply a general cap to cover all cases / suppliers (4) subsidise the technology / software (2), miscellaneous (2)
- Small milk delivery providers / milkmen would lose out to large suppliers such as large dairies or supermarkets because they operate on much lower prices (8)
 - Mitigate – e-vouchers only used by local milkmen not supermarkets (1), cap prices to sensible average market prices (1), train / support small local dairies (1)

Local dairies / milk providers (28 mentions).

Two main risks affecting local dairies and milk producers / farmers were mentioned – a) small local dairies / milk producers may not have (or be able to afford to buy) the technology to accept e-vouchers (10 mentions) and falling milk prices (7). Suggestions on how to mitigate these risks are summarised below.

- Local dairies / milk producers lack the technology to accept e-vouchers (10).
 - Mitigate – Allow them to be paid by alternative ways (2), Miscellaneous (3)
- Local dairies / milk producers risk falling / unviable milk prices (7)
 - Mitigate – Ensure fair milk prices are established (2), Miscellaneous (2)

Local retail businesses (25 mentions).

The main risk to local retail businesses perceived by respondents was that small, local retail shops would lack the technology (or not be able to afford to install the technology) to handle e-vouchers and therefore lose business (15 mentions). Three respondents also thought that there was a risk that small local shops would not be selected as outlets as the scheme is more suited to large retail chains / supermarkets that can offer very low prices. Suggestions on how to mitigate the main risk are summarised below.

- Small local shops lack or cannot afford to install e-voucher technology (15).
 - *Mitigate – enable all shops with technology to administer e-voucher (2), do not know (3), miscellaneous (2)*

Disadvantaged children / families – 61 risks mentioned by 61 respondents (3%).

†Note – sample cell less than 50 respondents, and may not necessarily be statistically significant or representative of the relevant population

25 respondents thought that lack of computer equipment / access the internet (including a few mentions of low IT literacy) amongst people in deprived areas would disadvantage them if e-vouchers are introduced. A further 36 respondents thought that children and families in deprived areas would be disadvantaged if an e-voucher system were introduced, with several mentions of people on low incomes or benefits, although very few actually explained why - a couple of respondents thought that it was because people in deprived areas would have less access to appropriate retail outlets, two respondents thought that poor education levels could make it harder them to understand the e-voucher system and one respondent thought the milk purchased might not be used correctly (i.e. not given to the children).

Organisations that most frequently mentioned disadvantaged children / families as a population at risk were childminders (4%) and local authorities[†] (2 out of 46 - 4%), compared to pre-school settings (3%), childcare settings unspecified (3%) and nurseries (2%), with no mentions from play groups (0%), milk suppliers (0%) or members of the public[†] (0%).

Suggestions on how to mitigate these risks area analysed below.

- Poor / disadvantaged people (36 mentions).
 - Suggestions on how to mitigate
 - *Have milk delivered to the settings and avoid administration / accessible shop issues (3)*
 - *Carry on as we are / no change (3)*
 - *Miscellaneous single mentions (7)*
- Disadvantaged families / children in deprived areas where they (as parents or childminders) or childcare settings in their area have no access to the internet and / or computer equipment, with a few mentions of low computer literacy (25).
 - Suggestions on how to mitigate
 - *Provide computer access through schools via link workers or FSM facilities (3)*

- *Provide information / support or help (2)*
- *Option of paper vouchers posted or collect at post office (2)*
- *Telephone / mobile phone option for managing the voucher (2)*
- *Miscellaneous single mentions (3)*

Government / Local government - 30 risks mentioned by 30 respondents (1.5%).

15 respondents thought that introducing the e-voucher system would disadvantage local authorities by increasing their costs to administer the system with their childcare settings, and 15 thought that Central Government would be disadvantaged (in terms of public finances) mainly due to anticipated abuse of the system. However, only 3 suggestions were given how to mitigate these risks (as summarised below).

- Local authorities will incur added administration costs (15 mentions).
Suggestions on how to mitigate
 - Use 3rd party specialist supplier to administer claims (1)
- Government (public finances) as e-voucher system is open to abuse (15 mentions).
Suggestions on how to mitigate
 - *Miscellaneous single mentions – Pay an upper cap (1), ask settings and milk providers to prove their costs more frequently (1)*

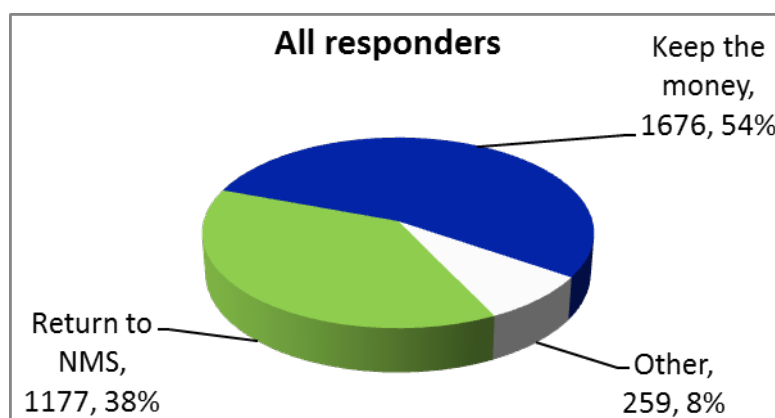
Ethnic minorities – 11 risks mentioned by 11 respondents (0.5%).

11 respondents referred to ethnic minorities being at risk of being disadvantaged by the introduction of an e-voucher system, and the main concern was that their weakness in understanding English would make it difficult for both people working in childcare settings as well as the parents of children attending childcare settings to understand the e-voucher system. Two respondents gave suggestions on how to mitigate these risks, as shown below.

- Ethnic minorities / people that speak poor or no English and may not understand the e-voucher system (11 mentions).
Suggestions on how to mitigate
 - *Miscellaneous single mentions – ensure all communications are multi-lingual (1), have an option to provide the e-voucher information in a different format (1)*

Q3.2 A childcare provider who sought very good value for money, may end up with a positive balance on the e-voucher card at the end of the year. What should happen to this money?

(Options - the money should be returned to the Nursery Milk Scheme, The childcare provider should be allowed to keep the money – other – please specify {tick one})



Source – 3350 respondents, 3112 answered Q3.2, 238 did not answer.

OPTIONS	Mentions
(PROMPTED) childcare provider should be allowed to keep the money – in order to use the money to buy extra milk for children in their care (which they could use, for example, in preparing the children's meals)	1676 (54%)
(PROMPTED) Money should be returned to the Nursery Milk Scheme	1130 (38%)
Other (unprompted) suggestions	238 (8%)
Total	3112 (100%)
Other (UNPROMPTED) suggestions / comments	
Setting keeps money – for financial purposes	138
Carry balance forward to the year period / year (and adjust voucher allowance accordingly)	77
Let them keep the cash as an incentive / reward for good shopping	29
Keep the money and use towards administration / mileage / staff costs	19
Allow to keep money to balance the fluctuations in attendances	13
Setting keeps money to use buying other (non-milk) items	83
Use money to buy healthy food / meals – e.g. fruit, veg, dairy products or more milk (soya milk also mentioned 2 times)	67
Use to buy equipment for the setting	9
Use the money for cooking activities with the children	7
Other suggestions	129
Disagree with e-voucher system / unacceptable waste of public money	26
Hassle / too complex	23
Give the money to a worthy charity / children's charity	15
Return to government / Nursery Milk Scheme	14
Needs checking - uneconomical to manage / recover the unused funds	8
Return to farmers	3
Other miscellaneous comments	40
Total (unprompted) comments	350

The above table contains 350 unprompted other suggestions provided by the 330 respondents (259 that ticked 'Other – please specify' and a further 71 respondents that ticked either the 'Money should be returned to the NMS' or 'The childcare provider should be allowed to keep the money'.

3,112 respondents answered Q3.2, 1,177 (38%) saying that if there was a positive balance on the e-voucher card at the end of the year, the money should be returned to the Nursery Milk Scheme, and 1,676 (54%) said the childcare provider should be allowed to keep the money to buy extra milk for children in their care.

330 respondents (259 that ticked the 'Other' box plus 71 that ticked the 'Return the money' or 'Keep the money' box) made 350 other suggestions. 221 suggestions involved the childcare setting keeping the money, although some respondents also added the proviso that the surplus should be small (less than 10% was suggested) but a large surplus should be returned to the Nursery Milk Scheme. The money could be spent either on paying towards overheads, administration costs / balancing fluctuations in child attendance numbers, or to buy non-milk items that benefit the setting or the children that go to it (such as other healthy food items, equipment for the setting or items for cooking activities with the children. One of the main drivers for this view was that respondents feel a childcare setting that achieves best value for money and makes a small surplus should be rewarded.

How the responses varied by type of organisation

Type of organisation	Return money to NMS	Setting keeps the money to buy extra milk	Setting keeps money for financial reasons	Setting keeps money to buy other (non-milk) items
Pre school	36%	51%	6%	4%
Nursery	31%	58%	5%	4%
Play group	46%	45%	8%	2%
Childminder	33%	61%	4%	1%
Childcare centre	26%	59%	7%	4%
Childcare setting unspecified	42%	51%	3%	2%
Local authority	44%	50%	2%	0%
Milk supplier	55%	44%	0%	0%
Member of public	35%	59%	5%	1%
Unknown	42%	51%	4%	8%
Total	38%	54%	4%	3%

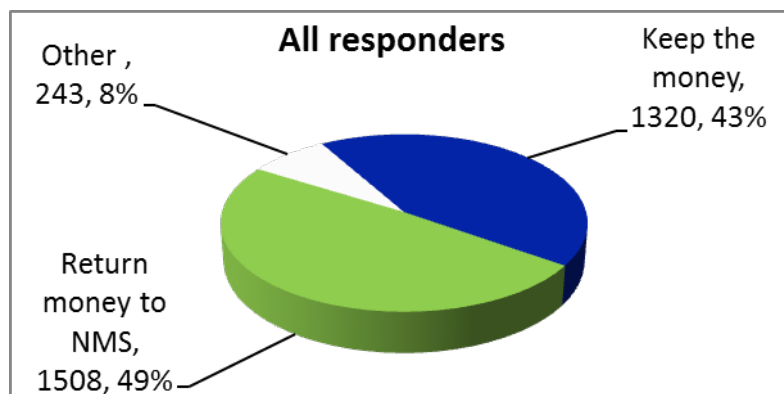
Legend  Ranked 1st by 50% or more

Comment

There is stronger support for a (modest) surplus being kept by the childcare setting, this view being supported at least 50% (ranging from 55% to 84% if the mentions for using it for extra milk, financial purposes and non-milk items are added together) of all but one respondent group, the exception being milk suppliers.

Q3.3 A local authority who sought very good value for money, may end up with a small positive balance in the ring-fenced account at the end of the year. What should happen to this money?

(Options - The money should be returned to the Nursery Milk Scheme, The local authority should be allowed to keep the money), other – please specify {tick one})



Source – 3350 respondents, 3071 answered Q3.3, 279 did not answer.

OPTIONS	Mentions
(PROMPTED) Money should be returned to Nursery Milk Scheme	1,508 (49%)
(PROMPTED) local authority should be allowed to keep the money – in order to use the money to buy extra milk for children in their care (which they could use, for example, in preparing the children's meals),	1,320 (43%)
Other (unprompted) suggestions	243 (8%)
Total mentions	3,071 (100%)
Others (UNPROMPTED) suggestions / comments	
Local Authorities keep the money and use appropriately	104
Carry balance forward to the year following period / year (several respondents added – adjust voucher allowance accordingly)	53
Local Authorities keep all / half surplus - incentive to get good value / administration costs	21
Use to support other childrens' services / local early years projects	22
Help other disadvantaged children or families / people	8
Local Authorities give money to settings to use – various suggestions how	81
Use money for settings to buy other healthy food – e.g. fruit, veg, dairy products or more milk	34
Give the money to settings to buy equipment / cooking activities with children or to use as they wish	43
Use for settings to balance fluctuating / unexpected attendances	4
Other suggestions	102
Give the money to a worthy charity / children's charity	12
Disagree with e-voucher system / unacceptable waste of public money	11
Hassle / too complex / too much administration / difficult to monitor	11
Return to government / Nursery Milk Scheme, especially if significant	9
Use to promote healthy eating / nutrition training for parents	8
Give the surplus back to the farmers	8
Ring fence and use for promoting the Nursery Milk Scheme	5
Do not' trust Local Authorities / risk money not spent correctly	4
Other miscellaneous comments	34
Total comments	287

The above table contains 287 unprompted other suggestions provided by the 277 respondents (243 that ticked 'Other – please specify' and a further 34 respondents that ticked either the 'Money should be returned to the NMS' or 'The Local Authority should be allowed to keep the money'.

3071 respondents answered Q3.3, 1508 (49%) saying that if there was a positive balance in the ring fenced account at the end of the year, the money should be returned to the Nursery Milk Scheme, and 1320 (43%) said the local authority should be allowed to keep the money in order to use the money to buy extra milk for children in their care.

104 suggestions related to the Local Authority keeping the money, either to carry over to the next year or to spend on other services benefitting children in their area, although some respondents also added the proviso that the surplus should be small but a large surplus should be returned to the Nursery Milk Scheme. 81 suggestions related to the LA giving the money to the childcare settings to use, mainly for buying healthy food or to buy equipment.

How the responses varied by type of organisation

Type of organisation	Return money to NMS	LA keeps the money to buy extra milk	LA keeps money to use	LA gives money to settings
Pre school	51%	39%	3%	3%
Nursery	44%	45%	4%	3%
Play group	55%	38%	3%	3%
Childminder	49%	48%	2%	1%
Childcare centre	27%	58%	4%	4%
Childcare setting unspecified	52%	40%	3%	2%
Local authority	44%	48%	6%	2%
Milk supplier	65%	34%	1%	0%
Member of public	44%	49%	3%	2%
Unknown	46%	46%	4%	3%
Total	49%	43%	3%	3%

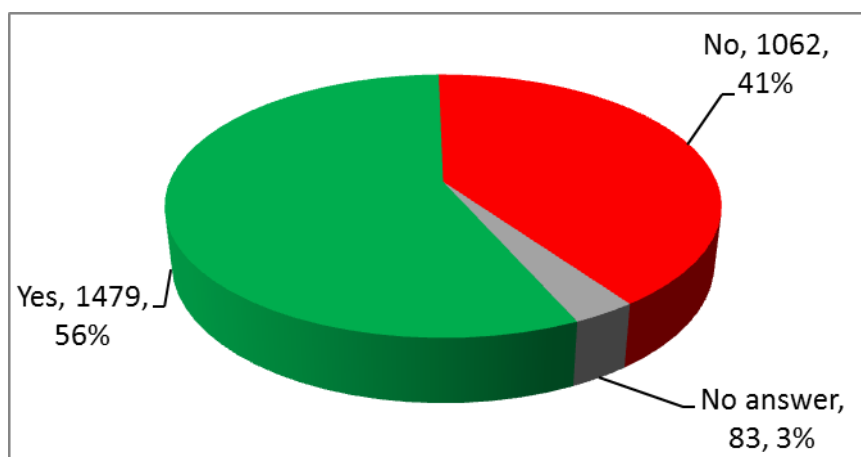
Legend  Ranked 1st by 50% or more

Comment

There is slightly stronger support for the money to be returned to the Nursery Milk Scheme, the greatest support coming from pre-school settings, play groups and milk suppliers compared to allowing the local authority to keep the money to use for buying extra milk for the children in its care, provided the surplus is small.

Q3.4 Would you feel comfortable using an e-voucher card which was updated electronically every month? (tick one)

Childcare providers only were asked to answer Q3.4



Source – 2,541 childcare providers answered this question, 83 did not answer.

By type of organisation

Type of organisation	YES	NO	NR	Total
Preschool settings	328 (55%)	227 (38%)	37 (6%)	592 (100%)
Nursery	362 (60%)	220 (36%)	25 (4%)	607 (100%)
Play group	49 (49%)	43 (43%)	9 (9%)	101 (100%)
Childminder	294 (68%)	128 (30%)	9 (2%)	431 (100%)
Childcare centre	17 (63%)	8 (30%)	2 (7%)	27 (100%)
Childcare provider (unspecified)	429 (50%)	436 (50%)	1 (<1%)	866 (100%)
Total	1,478 (56%)	1,062 (41%)	83 (3%)	2,624 (100%)

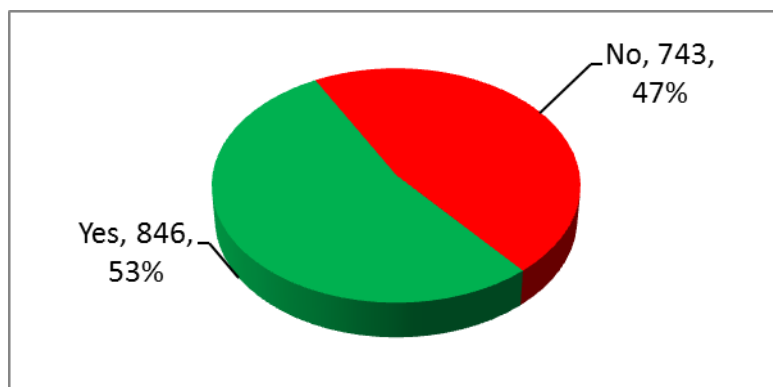
Comment

As seen in the pie chart 56% of the 2,624 childcare providers that were asked Q3.4 said they feel comfortable using an e-voucher card which was updated electronically every month compared to 41% that do not. The types of childcare organisation that feel most comfortable with using the e-voucher scheme were childminders (68% yes) and childcare centres[†] (17 of 27 - 63% yes). The types of organisation least comfortable with using the e-voucher scheme were unspecified childcare providers (50% no) and playgroups (45% no).

†Note – sample cell less than 50 respondents, and may not necessarily be statistically significant or representative of the relevant population

Q3.5 Do you think there would be a risk of the voucher card being used inappropriately?

The consultation only requested suppliers, distributors and retailers of milk to answer to this question (and 86 responded). However, 1,503 other organisations also provided views, providing additional insight into the risks associated with using an e-voucher. The response of all 1,589 respondents are analysed below.



Source – 1,589 respondents that answered Q3.5, 1,761 did not answer

843 respondents (53%) believe there would be a risk of the voucher card being used inappropriately (mainly buying milk for personal use or over claiming) compared to 743 (47%) who did not. The level of concern was significantly higher for milk suppliers (87%), compared to nurseries (51%), play groups (46%), pre-school settings (42%), childminders (42%) and local authorities (39%).

Q3.5a If yes, what measures could be put in place to avoid this risk?

Suggested measures to avoid this risk	Mentions
Strict security systems / random checks / audits / monitor invoices and receipts / electronic block or flag to prevent misuse	75
Some form of ID cards / passwords and PINs to be used / bar codes receipts / signatures required	71
Difficult to police - all schemes open to abuse / loop holes will be found	57
Do not adopt this option / keep current system	38
Ensure only used for purchase of milk / not to buy other goods	32
Have authorised and named or specified personnel / groups only	26
All solutions involve extra work / cost and add complexity – simplify it	25
Only use registered / approved dairy processors / suppliers / distributors	16
Apply a limit – price cap / quantity or value	16
Childcare settings to check milk suppliers delivery costs and volumes matches their child attendance numbers – provide info in numbers	15
Paper vouchers / tokens	4
Do not like the idea / do not think it will work	3
Do not have one / do not use them	3
Use emails to confirm numbers to settings	2
Use BACS to pay the settings	2
Other miscellaneous comments	28

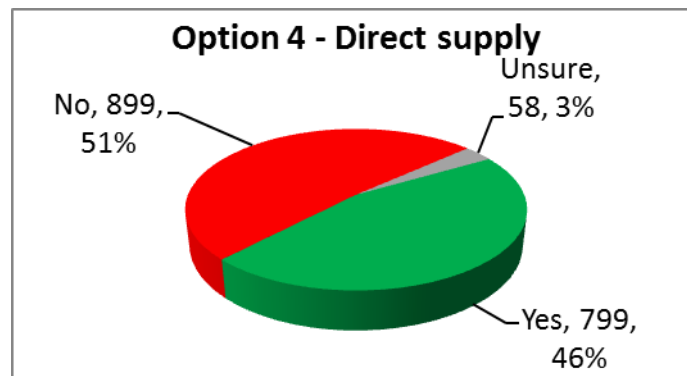
TOTAL	413
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CONSULTATION QUESTIONS FOR OPTION 4

Q4.1 Is there a risk that introducing direct supply of milk would disadvantage specific population groups?

Childcare settings – risks mentioned	657
Settings – delivery risks (note - excludes 140 delivery mentions in rural locations)	343
CC Setting – availability of delivery service could a national supplier reliably and consistently deliver (including 7 mentions of a service, i.e. all milk types & 1/3 pint ‘ other package, administration) to all settings, esp. small settings	109
Childcare settings with very variable numbers / variable opening times (in term and out of term times) – potential delivery issues	62
Childcare settings in inner urban / insecure locations which are prone to theft of milk (especially deliveries outside open hours/when closed)	41
Small childcare settings that lack storage space for milk (including 26 mentions of sporadic / infrequent delivery causing storage problems)	41
CC Setting – untimely delivery too late in day	29
Childcare settings getting door step deliveries and milk can go off in the heat	17
Childcare settings with limited opening times / access to deliveries if closed	13
Childcare settings delivery access for (small) settings in shared premises	10
CC Setting – unreliable delivery	9
CC Setting – Other delivery issues	12
Settings in remote isolated rural	209
Rural / remote / inaccessible areas - availability of delivery service	87
Rural / remote – unspecified reason	61
Rural / remote areas - cost of delivery	16
Rural / remote areas – sporadic delivery - storage problems	15
Rural / remote areas – disruptions to delivery due to weather	13
Rural / remote areas – unreliable / untimely delivery late in day	9
Rural / remote areas - other miscellaneous reasons	8
Settings – other risk	105
Small childcare settings / few staff – no reason given why	31
CC Setting – shifts costs back onto LA & settings – have to pay for cost of delivery, may reduce children access to milk	24
Childcare setting - no choice of supplier	23
CC Setting – increases administration time / costs	8
Childcare settings – miscellaneous comments	19
Small local business – risks mentioned	153
Small local business – milk delivery providers / milkmen	63
Small local retail businesses – milk providers	12
Local dairies / milk producers	26
Local farmers	19
Local businesses / local suppliers unspecified	33
Others – risks mentioned	127
Children with special dietary needs / religious needs	45
Government – this option could cost more money than current scheme, esp. to deliver to remote locations / replace retail buy with delivery	29
Government - milk waste: settings currently buy / have delivered what needed each day, esp. altering milk bought to match variable numbers attending	9
Disadvantaged families / people in deprived areas	14
Miscellaneous other comments	30
Total risks mentioned	937

As seen in the pie chart on the next page, 899 respondents (51% of those that responded to Q4.1) do not believe option 4 (introducing direct supply of milk) would disadvantage specific population groups compared to 799 respondents (46%) who think it would and mentioned 937 population groups and associated risks summarised in the above chart.



Sample – 1,756 respondents answered Q4.1, 1,594 respondents did not answer

No, there is not a risk – 899 (51%)

762 of the 899 respondents either said no or cannot think of any. However, 137 respondents also gave additional comments that shed light on why they believe there is no risk – a good idea / the best idea - very sensible, the easiest option (46 mentions), we already have milk delivered which works well (39 – 11 of which also mentioned Coolmilk), less / no paperwork or administration for claims (21), it cannot disadvantage anyone – it delivers to all (12), universal, fair system that benefits all (10), less abuse / ensures the money is spent correctly on milk (8), it supports local milk deliverers / dairies (8), but it may cost more / significantly more than the current system (3), other miscellaneous reasons (20). The remaining 58 respondents said no providing that certain criteria are met: provided the delivery is reliable (17), provided it is run properly with appropriate administration – several adding 'like the fruit and veg scheme' (12 mentions), provided special milks are provided if needed (10), provided it's fair to all – settings and milk providers (8), provided the system / suppliers is monitored / audited (6), other miscellaneous comments (5).

Organisations that said no most frequently were childminders (54%), childcare settings unspecified (53%), nurseries (53%) and pre-school settings (52%) compared to local authorities[†] (23 out of 47 - 49%), play groups (48%), members of the public[†] (14 out of 40 - 35%) and milk suppliers (8%).

Unsure – 58 (3%)

All but two of the fifty eight respondents simply said either they didn't know or were unsure, two provided additional comments why.

Yes, there is a risk – 799 (46%)

21 respondents simply said yes and provided no further details, but 778 out of the 799 that said yes also mentioned 937 specific population groups that they considered could risk being disadvantaged by the introduction of direct delivery (129 respondents mentioning more than one population at risk). Organisations that said yes most frequently were milk suppliers (92%), members of the public[†] (26 out of 40 - 62%) and local authorities[†] (24 out of 47 - 51%), compared to play groups (49%), pre-school settings (45%), nurseries (43%), childminders (43%) and

childcare

settings

unspecified

(25%).

ANALYSIS OF THE KEY POPULATION GROUPS PERCEIVED TO BE AT RISK

†Note – sample cell less than 50 respondents, and may not necessarily be statistically significant or representative of the relevant population

The key population groups thought to be disadvantaged by the introduction of direct supply of milk are analysed below, together with the most frequently mentioned suggestions by respondents how to mitigate these risks.

Childcare settings – 657 risks mentioned by 573 respondents (33%).

573 consultation respondents mentioned 657 risks relating to childcare settings, and by implication the children that attend. The most frequently mentioned risk population was settings facing a range of potential delivery risks (343), followed by settings in rural or remote isolated areas (204 mentions) and settings facing various other risks (106 mentions).

The perceived risks (all combined) that childcare settings potentially face were mentioned most frequently by milk suppliers (73%) compared to play groups (44%), local authorities[†] (20 out of 47 - 43%), pre-school settings (35%), childminders (32%), members of the public[†] (14 out of 40 - 35%), childcare settings unspecified (32%), and nurseries (25%).

The main perceived risks to childcare settings posed by the introduction of direct supply of milk and suggestions on how to mitigate them are analysed below.

Childcare settings facing delivery risks – 343 risks mentioned by 307 respondents (17%).

Several perceived risks were identified relating to delivery of milk to childcare settings. The main concern was that a national supplier might not be capable (or willing) to reliably and consistently deliver milk to all settings, especially small ones (109), followed by settings with variable numbers / opening times (62), settings in insecure locations, especially inner urban, where delivered milk is prone to theft (41), settings that lack storage space for milk including twenty six mentions of sporadic / infrequent delivery that would exacerbate this problem (41) and untimely milk deliveries (29).

Suggestions on how to mitigate these risks (and others mentioned) are summarised below.

- All childcare settings – risk that one large national supplier would not be able to reliably / consistently deliver to all settings, especially small ones requiring low volumes of milk delivered several times a week (109 mentions). This included seven respondents that specifically mentioned delivery of a full service, i.e. milk type / packaging size / delivery frequency / administration support.

Suggestions on how to mitigate

- *Strong service contract that ensures all childcare settings are guaranteed availability / level of the delivery service they require – i.e. type of milk, packaging size, frequency of delivery and administration carried out for them (52)*
 - *Let local dairies and milk deliverers participate in the supply chain (6)*
 - *Keep current system (5)*
 - *Break delivery contract into several regional contracts rather than once single national contract (3)*
 - *Monitor the scheme closely - to ensure supplier adheres to the contract (3)*
 - *Flexibility to allow settings to buy / source milk and be reimbursed (2)*
 - *Other miscellaneous suggestions (4)*
- Settings with very variable numbers / variable opening times – from day to day and week to week (62 mentions).
Suggestions on how to mitigate
 - *Ensure suppliers can match all settings' delivery requirements for quantities, frequency and delivery timing, including frequent changes (13 mentions)*
 - *Flexible options for setting to buy milk themselves at local shop (7)*
 - *Stay as we are with current system (5)*
 - *Setting to communicate regularly with milk supplier (4)*
 - *Open market of suppliers / other suppliers available if setting let down (2), engage with local milk suppliers (2), miscellaneous (4)*
- Settings in insecure, especially inner urban, locations which are prone to theft of milk, especially deliveries outside opening hours or when setting is closed (41 mentions).
Suggestions on how to mitigate
 - *Agree a mutually acceptable time to deliver when we are open (14)*
 - *Flexible options for setting to buy milk themselves at local shop (9)*
 - *A secure place / lock-up container to deliver the milk (3), other miscellaneous (2)*
- Small / voluntary childcare settings that lack storage space for milk, including 26 mentions of infrequent / sporadic delivery, possibly only once a week (41 mentions).
Suggestions on how to mitigate
 - *Ensure suppliers can match settings' requirements for frequent delivery (13)*
 - *Daily delivery (9)*
 - *Flexible options for setting to buy milk themselves at local shop (6)*
 - *provide milk in pint / large bulk containers (3), other miscellaneous (2)*
- Settings getting late delivery, especially deliveries too late in the day to be able to give the children their milk (29 mentions).
 The main concern is milk arriving late in the day (three said midday), i.e. too late to serve to children for their mid-morning snack break (one respondent said breakfast). However, they do not want very early morning deliveries when they are closed, they want milk delivered when they are open and in time to serve. Several respondents (mainly smaller settings) said they have cancelled having milk delivered because their supplier was unable to meet these requirements, and now buy retail milk.
Suggestions on how to mitigate
 - *Agree specific, acceptable (i.e. early enough to be able to serve children but when we are open) delivery time frame with each setting (15)*
 - *Ensure milk supplier delivers the milk on time (3)*

- *Other miscellaneous suggestions (3)*
- Settings - door step deliveries and milk can go off in the heat (17 mentions).
Most of the comments related to early morning deliveries in warm / hot weather, when the milk is likely to go off by the time the childcare provider opens up, or is too warm to serve. Three respondents mentioned the health and safety aspects of this as well.
Suggestions on how to mitigate
 - *Allow settings to buy retail milk themselves (5)*
 - *Agree mutually acceptable delivery time frame with each setting (4)*
 - *Other miscellaneous suggestion (1)*
- Settings with limited opening times - no access to deliveries if closed (13 mentions).
This issue is mainly with smaller childcare settings that work limited hours each day, or some only work a few days a week. There are two main concerns. One concerns childcarers that only work part time / limited hours, and would have to wait in until the delivery arrived. The other concerns milk being delivered out of opening hours and could get stolen or go off.
Suggestions on how to mitigate
 - *Agree mutually acceptable delivery time frame with each setting (8)*
 - *Other miscellaneous suggestions (2)*
- Childcare settings on another organisation's site (e.g. a school) or in shared premises / community building could experience delivery access problems (10 mentions).
Suggestions on how to mitigate
 - *Miscellaneous suggestions (5)*
- Unreliable delivery (9 mentions).
The main concern is that if there is one supplier for the milk contract, and they are unreliable in certain areas, there would be no flexibility to change supplier.
Suggestions on how to mitigate
 - *Alternative supplier or purchase arrangement in case of poor / unreliable delivery (2), avoid monopoly – appoint several / regional suppliers (2), ensure supplier maintains reliable delivery (2), other miscellaneous (1)*

Childcare settings facing other risks – 105 risks mentioned by 100 respondents (6%).

100 respondents mentioned 105 other risks concerning childcare settings. The main population at risk was small childcare settings with few staff, but responses gave little if any comment about the nature of the risk (31 mentions). Some respondents thought that the option would shift costs back onto the childcare setting which may in turn reduce the number of children that have access to free milk (24 mentions) and other respondents thought the option would involve a single supplier and settings would then no longer have choice of supplier, particularly important if things go wrong (23 mentions). Ten respondents also thought it would increase settings' administration time and costs.

Suggestions on how to mitigate these risks (and others mentioned) are summarised below.

- Small childcare settings with few staff (31 mentions).
This population group contains small childcare settings that employ only a few staff. Although respondents did not comment about the nature of the risk, a few curiously enough gave comments how to mitigate this risk.
Suggestions on how to mitigate
 - *Keep the existing scheme (3), treat them the same as everyone else (2), other miscellaneous suggestions (3)*

- Shifts costs onto the childcare setting which may in turn reduce the number of children that have access to free milk (24 mentions).
Suggestions on how to mitigate
 - Although 24 respondents mentioned this population risk, only two provided any suggestion how to mitigate it – miscellaneous suggestions (2)

- Childcare setting would no longer have a choice of supplier (23 mentions).
The main concern is that this option would involve a single supplier, and settings would have no choice of an alternative provider if they encountered problems.
Suggestions on how to mitigate
 - *Allow setting to choose own supplier (delivered milk or retail outlet) (11)*
 - *Do not allow one supplier to have a monopoly or dominate delivery (3)*
 - *Other miscellaneous suggestions (2)*

- Increases settings administration time and costs (8 mentions).
Suggestions on how to mitigate
 - *Keep the scheme simple and remove the administration costs to a third party (4)*
 - *Other miscellaneous suggestions (2)*

Settings in remote isolated / rural areas and small villages - 209 risks mentioned by 201 respondents (11%).

Several different perceived risks were identified relating to childcare setting in isolated / rural areas through the introduction of direct supply of milk, the main one being availability of delivery service (87 mentions), followed by cost of delivery (16), sporadic / infrequent delivery (i.e. only once a week rather than several times or daily) which could cause storage problems (15), delivery disrupted due to the weather (13), unreliable / untimely delivery – e.g. later in the day / too late to give to the children (9) and other unspecified reasons (8). Suggestions on how to mitigate each of these risks are summarised below.

- Availability of delivery service (87 mentions).
 - Suggestions on how to mitigate
 - Mitigate – Engage local milk suppliers to participate (13)
 - Flexible options for setting to buy milk themselves at a shop (10)
 - Enforce a strong contract ensuring suppliers must deliver to all settings – large as well as small or remote locations (6)
 - Keep scheme as it is / carry on as we are (6)
 - Exceptions / subsidies for deliveries in remote locations (2), miscellaneous (10)
- Cost of delivery (16 mentions).
 - Suggestions on how to mitigate
 - Apply a discretionary regional top-up price / subsidy (5)
 - Keep scheme as it is / do not change (2), miscellaneous suggestions (5)
- Sporadic / infrequent delivery (i.e. only once a week rather than several times or daily) which could cause storage problems (15 mentions).
 - Suggestions on how to mitigate
 - Miscellaneous suggestions (7)
- Delivery disrupted due to the weather (13 mentions)
 - Suggestions on how to mitigate
 - Flexibility for arrangements to buy from local shop (5), other miscellaneous (2)
- Unreliable / untimely delivery (9 mentions)
 - Suggestions on how to mitigate
 - Flexible options for setting to buy milk themselves at a shop (3)
 - Other miscellaneous suggestions (1)
- Other unspecified reasons (61 mentions)
 - Suggestions on how to mitigate
 - Stay as we are / do not change current system (5), flexible options for setting to buy milk themselves at local shop (3), engage local milk delivery suppliers (3), miscellaneous (3)

Small / local businesses – 153 risks mentioned by 142 respondents (8%).

The main groups of small local businesses thought to be at risk were – small, local milk delivery providers / milkmen (63 mentions), local dairies / milk producers (26), farmers (19) and local businesses / milk suppliers – type unspecified (33).

The perceived risks that small / local businesses potentially face were mentioned most frequently by members of the public[†] (6 out of 40 - 15%), milk suppliers (10%) and nurseries (10%), compared to childcare settings unspecified (9%), pre-school settings (7%), childminders (6%), play groups (5%) and local authorities[†] (2 out of 47 - 4%).

The risks to each group / suggestions on how to mitigate them are analysed below.

- Small local milk delivery providers / milkmen (63 mentions).
The main concern is that a direct supply option would involve a major supplier dominating the milk supply chain, to the exclusion of many, most or possibly all small local milk delivery providers / milkmen.
Suggestions on how to mitigate
 - Ensure small, local milk delivery suppliers / milkmen fully participate (17)
 - Allow childcare settings to nominate which milk suppliers they wish to use(4)
 - Flexibility to allow settings to choose how / where to buy milk (2), carry on as we are with the current system (2) other miscellaneous suggestions (3)
- Local dairies / milk producers (26 mentions).
The main concern is that a direct supply option would involve a major supplier dominating the milk supply chain, and would operate mainly or only with large dairies to the exclusion of many, most or possibly all small local dairies.
Suggestions on how to mitigate
 - Ensure small, local dairies fully participate and supply within the scheme (9)
 - Allow settings to choose who supplies their milk (3)
 - Carry on as we are / keep the current system (2) other miscellaneous (4)
- Local farmers (19 mentions).
The main concern is that a direct supply option would involve a major supplier dominating the milk supply chain and negotiating very high volumes at very low prices, resulting in farmers being paid very low prices for their milk
Suggestions on how to mitigate
 - Ensure farmers are paid a fair price for milk (6 mentions)
 - Form co-operatives / groups of local farmers to supply direct to settings (2)
 - Other miscellaneous suggestions (4)
- Local businesses / suppliers - unspecified (33 mentions).
This group includes mentions of local businesses / suppliers, where the comments do not clarify if this entails a retailer, a milk deliverer or a dairy / farmer. However, the main concern is that this option will affect small and local businesses, because they might be excluded from the supply chain and lose business they currently enjoy in supplying milk to the Nursery Milk Scheme.
Suggestions on how to mitigate

- *Do not change the system / keep it as it is (4)*
- *Allow settings to source their milk from local businesses (3)*
- *Include small, local businesses in the supply chain (3)*

Other populations

Two other groups were thought to be at risk - children with special dietary / religious needs (45 mentions) and the government / public expenditure (38).

- Children with special dietary needs / religious needs (45 mentions).

The main risks mentioned were children with religious requirements - kosher milk mentioned 10 times (17 mentions), health / milk allergies / intolerance (14), special dietary needs (10), special milks (8), cultural requirements (4), those that require organic milk (3), ethnic population requirements (1) and vegans (1). The main concern was that milks for these 'special' requirements would not be available under a direct supply option, although a few respondents also mentioned the cost aspect.

Suggestions on how to mitigate

- *Allow options for alternative milks, including one suggestion of a specialist supplier(s) to provide these milks (15 mentions)*
 - *Allow settings to buy these milks locally (4)*
 - *Do not know / very hard to achieve this (5), other miscellaneous suggestions (6)*
- Government / public expenditure – this option could cost more money than the current scheme, especially delivering to all remote locations and delivering to settings that currently find it more economical to buy from a local retail outlet (29 mentions).

Suggestions on how to mitigate

- *Allow childcare settings to buy their milk locally (6)*
 - *Ensure there is local and regional tendering for the supply of milk (3)*
 - *Vertically integrate into Local Authorities who already have administration / supply chain in place (1)*
 - *Avoid this option (2), other miscellaneous suggestions (2)*
- Government / public expenditure – the main risk is milk waste caused by delivering milk to settings that currently buy from retail outlets or from local milkmen and are able to match the milk they buy with the amount they need each day, especially in smaller childcare settings where child attendance numbers can vary significantly day to day / week to week (9 mentions).

Suggestions on how to mitigate

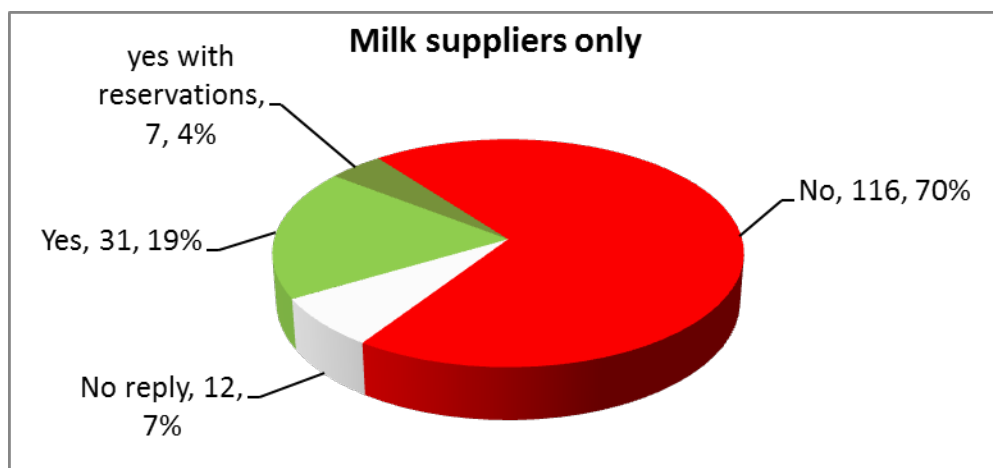
- *Ensure supplier can deliver the appropriate pack size / amount required on the days when required by the setting (5)*
- Disadvantaged families / people in deprived areas (14 mentions).

Suggestions on how to mitigate

- Respondents mostly didn't explain the nature of the risk or how disadvantaged families would be at risk. Only five gave suggestions on how to mitigate this risk, the only once mentioned more than once was keep the current system (2 mentions).*

PRODUCERS, SUPPLIERS, DISTRIBUTORS, RETAILERS OF MILK

Q4.2 Would you be interested in participating in the direct supply and delivery of milk to childcare providers, either to supply the whole country yourselves or as part of a consortium?



Of the 166 milk suppliers responding to the consultation, all but 12 (7%) answered this question.

NO

116 of these (70% of the total) said that they would not be interested. Of those that gave a reason for this:

- 20 (12%) said that 40p was too low a price
- 2 (1%) saying their company was too small
- 1 (1%) being concerned about the viability of the scheme

YES

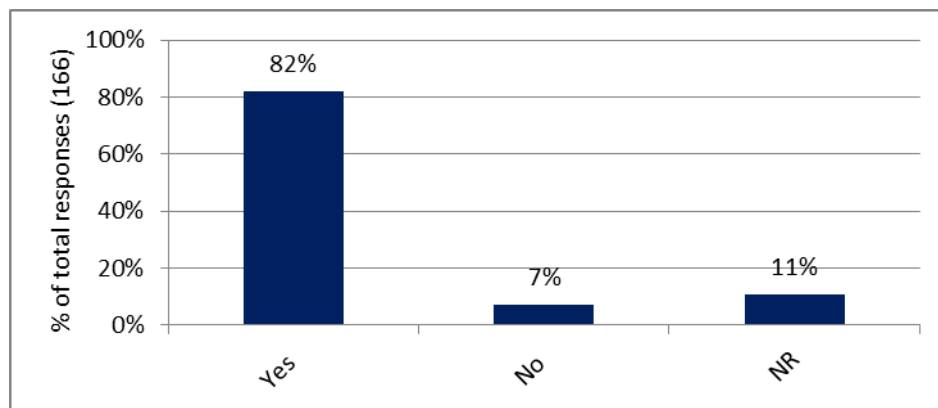
Of the 38 (23%) who said they would be interested:

- 31 said yes without reservations
- 7 said yes with reservations, of which there were
 - 4 saying they would do it, but not at 40p per pint
 - 3 saying that they would do it, but that price was important

Q4.3 Are there any parts of the country that you think would be difficult to supply under this model?

Note - In the consultation, Q4.3 only asked for feedback from producers, suppliers, distributors and retailers of milk, and 148 provided answers. However, 513 other organisations (unsolicited) also provided feedback, and their views have been included (after the milk supplier feedback) as they provide additional insight into this important issue.

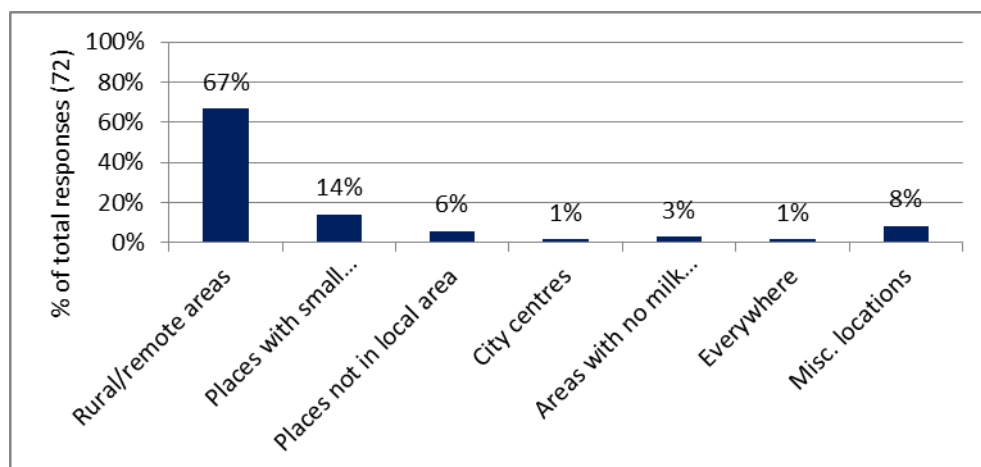
Milk suppliers



Source – 148 milk supplier respondents answered Q4.3, 18 did not.

Amongst milk suppliers, there was a significant proportion who said that there were parts of the country that they thought would be difficult to supply under this proposed model. 82% of respondents answered 'yes' to this question; and only 7% answered 'no'. Only 11% of milk suppliers did not respond to this question.

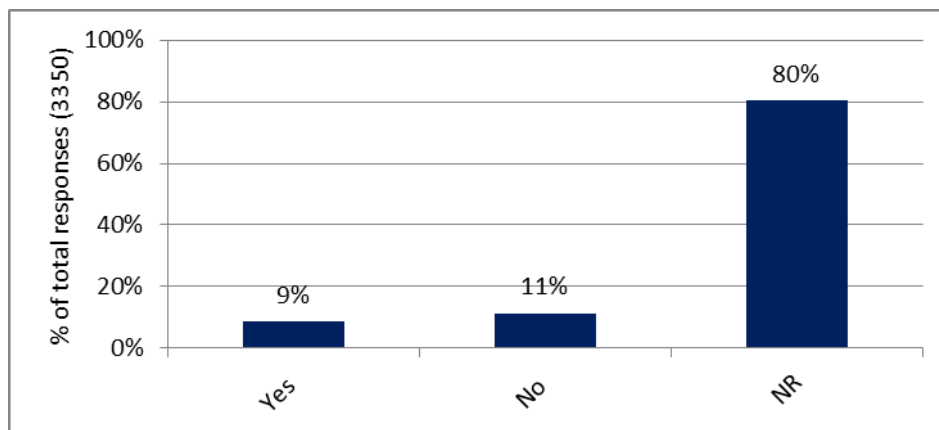
If yes, where?



Source – 72 milk supplier respondents that said yes to Q4.3

Of the milk suppliers that answered 'yes', a significant majority (67%) said that rural/remote areas would be difficult to supply, followed by places with small orders (14%), and places not in the local area (6%):

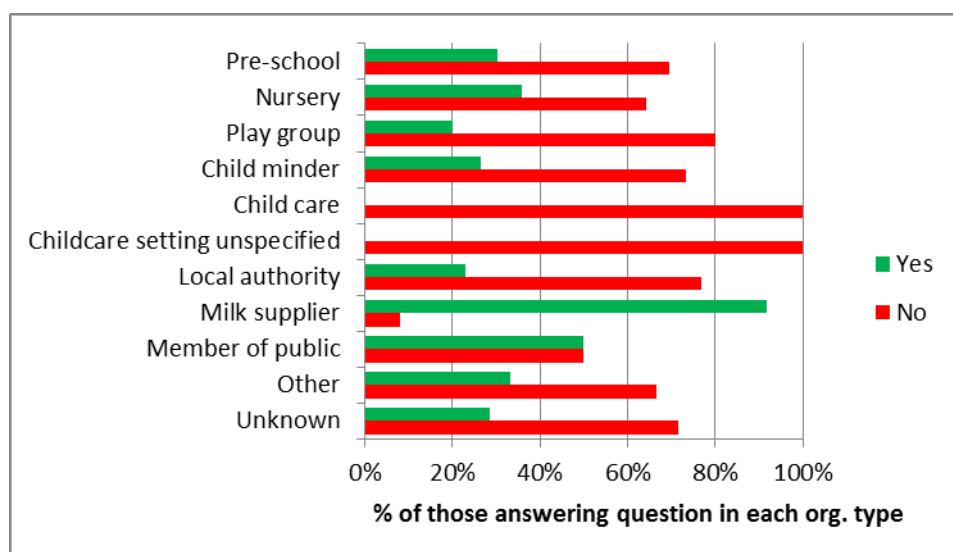
All respondents



Source – 3350 respondents - 661 respondents answered Q4.3, 2689 did not.

A significant proportion of respondents to the consultation did not answer this question (which had been directed in theory only at milk suppliers). Of those who did, slightly more answered 'no' (11%) than 'yes' (9%).

Note - Some findings in the following cross tabulation analysis (marked with the symbol '+') are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

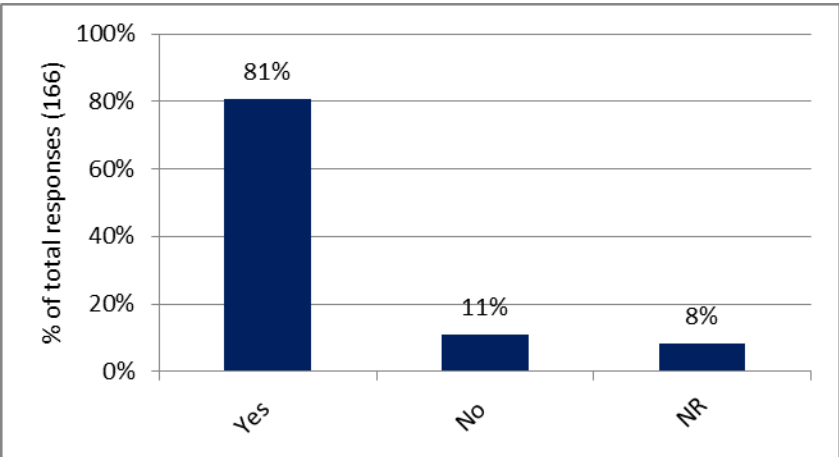


The chart above shows how this question was answered by each type of respondent. The balance between 'yes' and 'no' varies slightly from one to another; but the striking result is that the answers from the milk suppliers are so different from any others – they are the only group that answered 'yes' more than 'no' (and by a significant margin). Although this is a clear trend, it is important to note that due to the high numbers of non-respondents from all but the milk suppliers, none of these results is quite statistically significant[†].

Q4.4 Are there any types of childcare provider that you think would be difficult to supply under this model?

Note - In the consultation, Q4.4 only asked for feedback from producers, suppliers, distributors and retailers of milk, and 160 provided answers. However, 483 other organisations (unsolicited) also provided feedback, and their views have been included as they provide additional insight into this important issue.

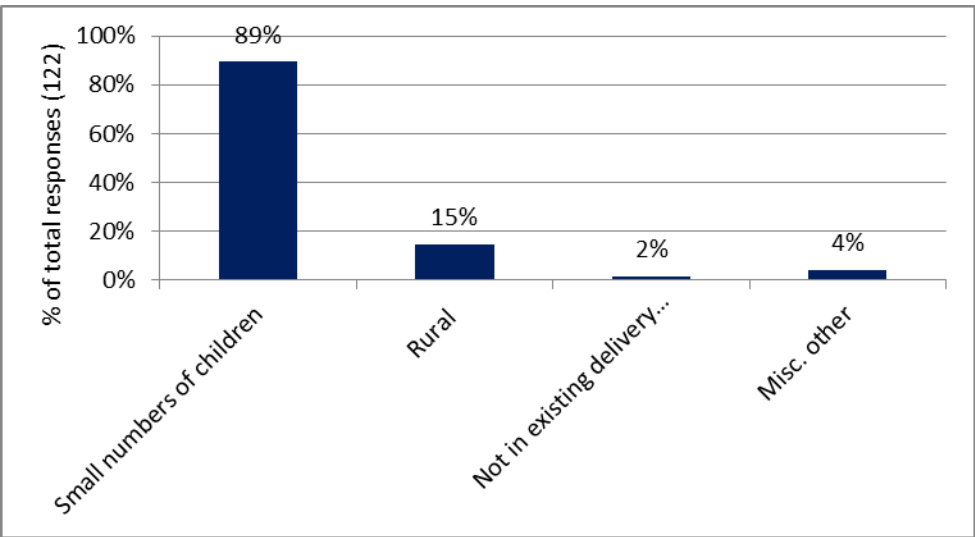
Milk suppliers only



Source – 166 milk providers – 152 answered Q4.4, 14 did not.

A significant majority of milk suppliers said that there were types of childcare providers they thought *would* be difficult to supply under this proposed model. 81% of respondents answered ‘yes’ to this question; and 11% answered ‘no’. 8% of milk suppliers did not respond to this question.

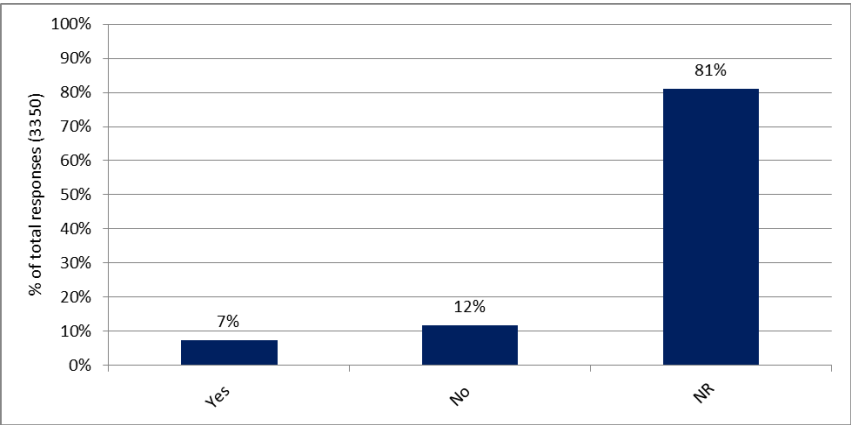
If yes, where?



Source – 122 milk provider respondents gave additional responses to Q4.4, yes

Of those milk suppliers that answered ‘yes’, a significant majority (89%) said that childcare providers with small numbers of children would be difficult to supply, followed by childcare providers in rural areas (15%), and childcare providers not in the existing delivery area (2%).

All respondents



Source – 3350 respondents, 635 answered Q4.4, 2715 did not.

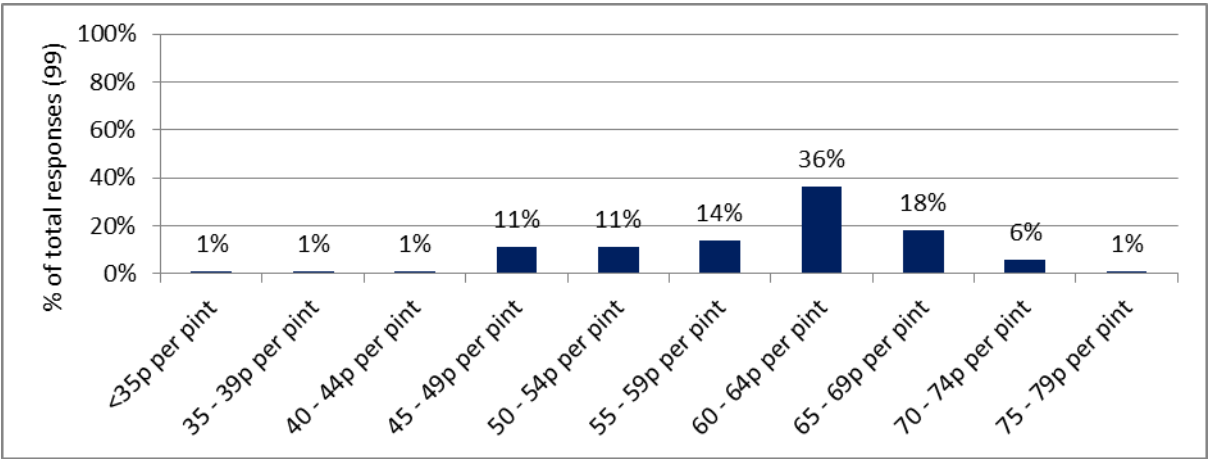
However, the responses when analysed for all respondent were significantly different. Although a significant proportion of respondents to the consultation did not answer this question (which had been directed only at milk suppliers), of those who did, significantly more answered ‘no’ (12%) than ‘yes’ (7%).

Note - Some findings in the following cross tabulation analysis (marked with the symbol ‘†’) are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

These results are consistent across all different types of organisation (except milk suppliers – see below), with ‘yes’ varying between 0% (childcare†, childcare setting†, healthcare†) and 6% (nursery†), and ‘no’ varying between 10% (playgroup†) and 18% (childminder).

Q4.5 (Milk suppliers only) What do you think is an appropriate price per pint to charge for supply and delivery of milk?

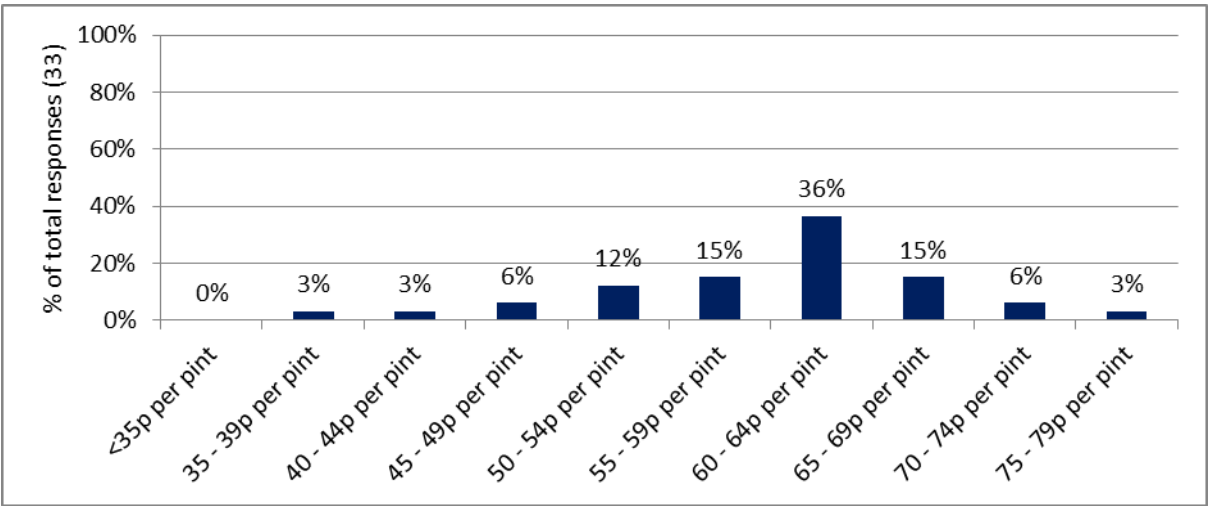
Data in this section is not considered to be reliable or representative of the market generally, and should be treated with caution – because respondents did not (in many cases) specify which pack size was involved.



Source – 99 respondents answered Q4.5, 67 did not

99 milk suppliers answered this question (and therefore we know that these answers relate only to delivered milk). Amongst these, by far the most common answer was a price of 60 – 64p per pint (36%); followed by 65 – 69p per pint (18%). Significant numbers also answered: 45 – 49p per pint (11%); 50 – 54p per pint (11%); and 55 – 59p per pint (14%). However, most of these respondents did not specify the pack size involved, and it is often unclear if the quoted prices relates to a pint container or a pint equivalent price and therefore the data does not necessarily reflect a fair comparison, and should be treated with caution.

However, looking just at the subgroup of 33 of these respondents, who *did* specify that the pack size was a pint, the range of prices is very similar, as shown in the chart below. Still, the most common answer is a price of 60p – 64p per pint (36%).



Q4.6 What ideas do you have for ways the scheme could operate more efficiently in the future, including supply chain options?

The consultation only requested suppliers, distributors and retailers of milk to respond to this question (and 29 provided ideas). However, 145 other organisations (96 childcare settings and 49 others / unknown) also provided views. The ideas provided by all 174 respondents are summarised in the table below.

Ideas and suggestions	Childcarers	Milkmen	Others	Total
Leave the current system as it is / do not change	12	3	5	20
Happy with current system / it works well / efficient	10	1	9	20
Cut out the middle men, let dairies deal direct with childcare settings	2	3	6	11
Establish a price cap	3	4	2	9
Keep / use local milkmen and delivery system	5	0	3	8
Use agents / national contracts/ organisations (Local Authorities and NHS) to order and distribute	2	0	5	7
Get local dairies to deliver in local areas at an agreed fair price	1	4	1	6
Use supermarkets for supply, the cheaper option	6	0	0	6
Monitor system better; reduce / stop abuses	2	1	1	4
Go for Option 2 - avoid Option 4 (direct supply)	0	3	0	3
Voucher option has benefits / is good	2	0	1	3
Remove childcare settings that have abused system and retain those that charge a sensible price	0	2	0	2
Less frequent deliveries in larger quantities	1	0	1	2
Adapt "fruit & Veg" scheme principles	0	2	0	2
Miscellaneous other comments	26	12	11	49
TOTAL	72	35	45	152

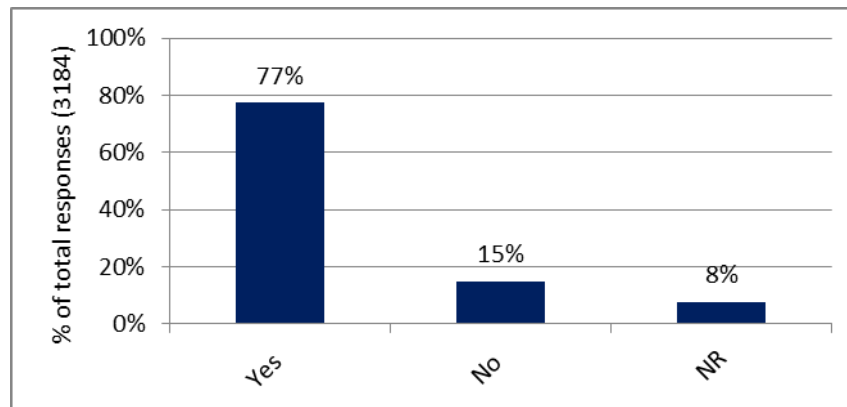
Source – 174 respondents that answered Q4.6

The two most frequently mentioned suggestions (each by 20 respondents – 11% of the sample that provided ideas) were to leave the current system alone (as it works well so why change it) and to establish a price cap. Eleven respondents (6%) suggested removing the middle men.

Other suggestions were mentioned by 5% or less of the sample.

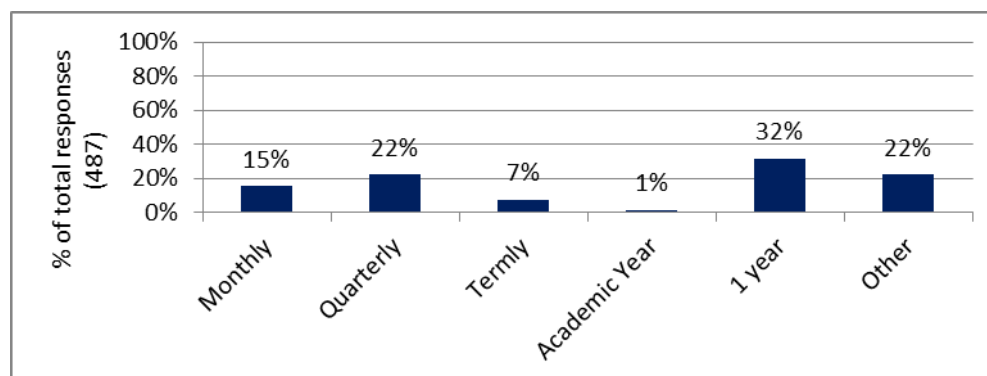
QUESTIONS ON TIME LIMIT FOR MAKING CLAIM

Q5.1 (Childcare providers only) Is six months a sufficient time period within which to claim reimbursement?



A significant majority of childcare providers say that six months is a sufficient time period within which to claim reimbursement for their milk supplies. 77% of respondents answered 'yes' to this question; and only 15% answered 'no'. Only 8% of childcare providers did not respond to this question. The cross-tab by type of childcare provider shows no significant differences to this pattern.

Q5.2 If no, what time period would be sufficient?



From those respondents not in favour of a six month time period for claiming reimbursement, there was no overall clear view as to what a better alternative would be. More said a year than anything else (32%); followed by quarterly (22%); monthly (15%); and termly (7%).

Note - Some findings in the following cross tabulation analysis (marked with the symbol '†') are based on samples of less than 50 respondents and may not necessarily be statistically significant or representative of the relevant population.

There were no significant differences between different types of childcare providers (although at this level of analysis, most with small volumes†), with a year clearly the most popular amongst all groups.

CONSULTATION QUESTIONS ON THE WAY FORWARD

Q6.1 Which of the three options for change do you prefer?

(Rank the three options in order of preference, (1 – 3) with 1 indicating the most preferred)

Preferred option	Ranked 1 st	Ranked 2 nd	Ranked 3 rd	Total answered	No answer
Option 4 – Direct supply	1,584 (53%)	562 (19%)	830 (28%)	2,976 (100%)	374
Option 2 – Capping the price claimed for milk	1,232 (39%)	788 (25%)	1,110 (36%)	3,130 (100%)	220
Option 3 – Issue e-voucher with economy incentives	463 (16%)	1,411 (49%)	1,027 (35%)	2,901 (100%)	449

Legend  Ranked 1st by 50% or more  Ranked 1st by 33% - 49%

Sample –3,241 respondents answered Q6.1 (ranking at least one option), 109 did not answer Q6.1

Option 4 (direct supply) is the option preferred by most respondents (53% of respondents that ranked it), with only 28% ranking it 3rd. Option 2 (capping the price that can be claimed for milk) was the next preferred option, ranked 1st by 39% but ranked 3rd by 36%. Option 3 was the least liked option, ranked 1st by only 16%, ranked 2nd by 49% and third by a further 35%.

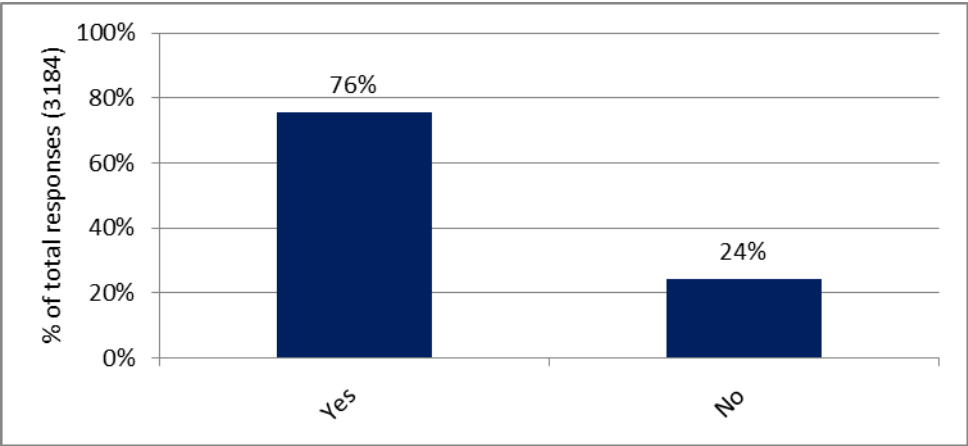
Type of organisation	Ranked 1 st Option 2	Ranked 1 st Option 3	Ranked 1 st Option 4
Pre school	34%	16%	54%
Nursery	36%	15%	53%
Play group	44%	8%	51%
Childminder	33%	25%	49%
Childcare centre	48%	9%	73%
Childcare setting unspecified	36%	13%	55%
Local authority	54%	15%	51%
Health care	46%	29%	38%
Milk supplier	96%	3%	28%
Member of public	27%	28%	46%
Other	47%	36%	55%
Unknown	41%	14%	58%
Total (that ranked each option)	39%	16%	53%

Comment

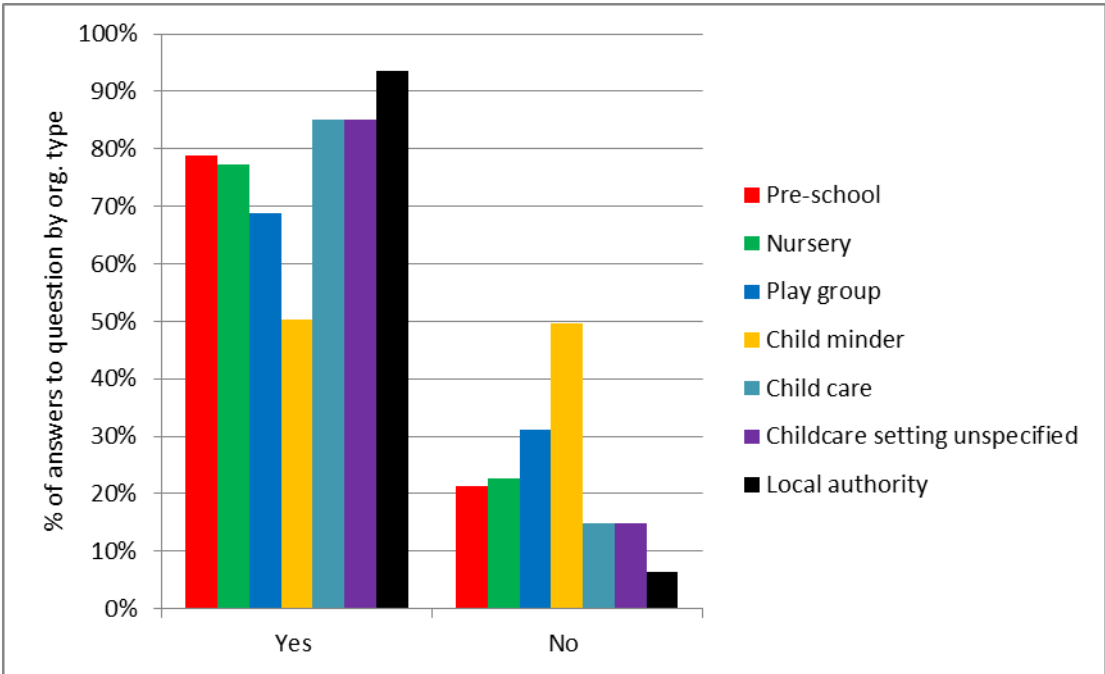
Option 4 is the preferred option, ranked 1st choice by 53%, and by more than 50% by five types of childcare setting and local authorities. Option 2 is the second preference, ranked 1st choice overall by 39% of respondents, ranked 1st by 96% of milk suppliers and 54% of local authorities.

Q6.2 Do you currently buy your milk from a milk rounds man, specialist supplier (agent) or through any other arrangement where you contract in advance for milk to be supplied?

Childcare providers and local authorities only were asked Q6.2



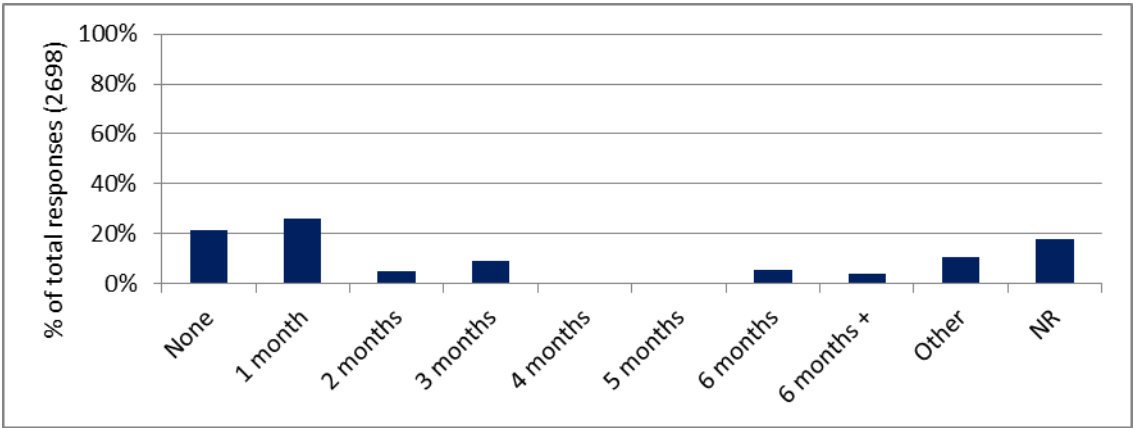
A significant majority of childcare providers / local authorities contract in advance for their milk supplies. Only 10% of the target audience (childcare providers and local authorities) did not respond to this question. Of those that did, 76% of respondents answered ‘yes’ to this question; and only 24% answered ‘no’.



There was some variation in this by type of childcare provider, as seen in the chart above. In particular, it is noticeable that far fewer childminders contract in advance for this milk that other types of provider, with 50:50 split between those answering ‘yes’ and ‘no’, and highest for local authorities†, where 94% said yes.

Q6.2a If one of option 2, 3, or 4 were to be introduced and, as a result, you needed to change or end your current arrangements, how much notice would you need to give your current milk supplier?

Childcare providers and local authorities only were asked Q6.2a



Despite the majority of childcare providers contracting in advance for their milk supplies (see *question 6.2*), it appears that childcare providers would need to give very little notice to their current milk suppliers if they needed to change or end the current arrangements. A significant number (487) of childcare providers / local authorities did not respond to this question.

Of respondents that answered the question, 58% said that they would require two months or less: with 26% of respondents saying that they would need to give no notice at all; and another 25% saying they would require only a month. Only 5% of respondents said that they would require more than six months. Four of these respondents specified how much longer: three said a year, and one said two years.

12% of respondents selected 'other' as an option, but an analysis of these responses show that the vast majority answered 'do not know' or some equivalent wording.

There were some slight differences by type of provider. The most significant is that childminders appear to need to give even less notice to their milk suppliers than other groups: 81% (of childminders answering the question) responded that they would require two months or less, and 52% required no notice at all.

Q6.3 Do you have any ideas for suitable options which have not been mentioned in this consultation document?

The consultation only requested childcare providers and local authorities to respond to this question (and 456 provided ideas). However, 67 other organisations also provided valuable ideas and suggestions. The feedback provided by all 523 respondents is therefore summarised in the table below.

Ideas	Mentions
Happy with current scheme as it is – it runs well keep it as it is	218
Just cap the amount that can be claimed for and maintain flexibility	49
Help / support local businesses (any sort – retailer / milk supplier)	39
Direct supply option is fine	35
Administration free system	32
Flexibility in new system, e.g. adjust to number of days / buying milk yourself or having it delivered	28
Let childcare settings choose their own supply as appropriate	23
Needs better monitoring / more vigorous auditing to stop fraud	21
Eliminate the middle man	13
e- vouchers is fine / preferred (option 3)	13
Keep single units / 1/3 rd cartons / containers as convenient / beneficial for childcare settings	10
Discontinue the 1/3 cartons – expensive and wasteful (many small children cannot drink 1/3 pint)	9
Make agreements with supermarkets to supply / deliver; as cheaper than specialist suppliers	11
Adopt a re-imbursement on provision of receipts only basis	7
Consultation ideas proposed are comprehensive and constructive	6
Claim on longer 3 or 6 month cycles	6
Scrap Nursery Milk Scheme altogether - outdated	7
Milk tokens and vouchers	5
Government pays dairies direct to deliver the milk	3
I'd prefer large container (4pt / 2ltr) rather than smaller units	3
Adopt the best value option if current scheme too expensive	2
Other miscellaneous	96
Total mentions	636

Sample – 523 respondents suggested ideas, 291 said no, 2537 did not answer Q6.3,.

814 of the 3,350 people that responded to the consultation answered this question, 523 provided 636 suggestions, 291 respondents just said no / none.

The most frequently mentioned idea (mentioned by 218) was that they are happy with the scheme, which runs well, and they would like it to continue as it is (87% of these respondents were childcare settings or Local authorities). Maintaining flexibility, whichever option is adopted, was mentioned by 110 respondents (21%).

Specific organisations' written or emailed responses - additional comments

Additional information

Most of the written or email responses received by the Department of Health for the consultation were either completed copies of the downloadable questionnaire, or contained comments that readily addressed specific questions within the questionnaire. These comments have been entered into the database to be analysed alongside the online feedback gathered by Citizen Space. However, several organisations also provided additional information and comments that did not readily fit within the questions contained in the online questionnaire, but need to be reported because they contain valuable information that makes an important contribution to the knowledge gathered in this consultation. Organisation details have been anonymised to maintain confidentiality.

It should be noted that there is not space to include the full text of these submissions in the confines of this report. However, we have sought to provide a synopsis of the key points contained in the submissions that are in addition to any points identified and entered into the main database for analysis. Any of the views and claims made in the following summaries are wholly those made by the respective organisations submitting the comments. It is not the author of this report's remit to evaluate the impact of different options, nor to analyse or comment on the validity of any cost data, claims or comments submitted by respondents.

Organisation A – (industry representative body)

Currently only 40% of children under the age of five have their daily drink of milk through the Nursery Milk Scheme and we are concerned that the proposals will reduce rather than increase the number of children that have access to milk while in an educational setting. It is important that the adopted solution aligns with the Government's overarching commitment to minimise and reduce the burdens upon early years settings, particularly the Department for Education's and Department for Work and Pensions' Commission on Childcare launched by the Prime Minister.

A number of our members have also expressed concern that this option could lead to UHT milk being used in settings in place of fresh pasteurised milk. Many settings would be unable to serve children milk if it was not delivered in one third of a pint packaging and these children would miss out. We have serious concerns about the knock on effect that changes to the Nursery Milk Scheme could have on the over-fives scheme. A reduced take up among under-fives may result in fewer over-fives moving on to school milk, and if providers no longer supply to certain childcare settings, it will be harder for them to supply to schools as part of the over-fives milk scheme.

The option for settings to receive their milk in one third of a pint measures and for the price of milk that the Department pays to reflect this. Any increase in the burden upon childcare provider staff, including paperwork, staff commitment and time spent managing the scheme will lead to a reduction in the number of children receiving milk through the scheme. Finally, we believe that if there are alternative funding routes available, such as the subsidy that is available from the EU, these resources should be claimed to support the scheme.

Organisation B – (industry representative body)

We believe that the provision of free milk to children under 5 in children's settings is a very important universal benefit. The nutritional content of milk is rich in protein, calcium, and vitamins. In particular it contains vitamins B2, B6, and B12. It also contains folate and essential minerals such as iodine, phosphorus, and zinc. It is a food that makes a valuable contribution to young children's diets.

The basis of a cost of 92p per pint is misleading. In Local Authorities, Primary schools and State Nurseries 90% of the milk consumed is served in individual 1/3 of a pint cartons which are more expensive and to make a comparison between one unit of a pint or three units of thirds distorts the true cost of the provision. From our research the average price at present is around 26p which equates to 78p a pint less the EU and Government subsidy of nearly 4p per unit which equals 66p a pint. In our opinion the Data for Family Food Survey quoted in the consultation of the years (2007-2009) average price of milk at 36p for England and 35p for Wales is very misleading. The prices used in the Impact Assessment for option 2 for the calculations are unrealistically set at 35-50p per pint. As stated in our response to option 1 the real price after the deduction of the subsidies is around 66p per pint based on the provision of 1/3 of pint units.

- Local Authorities already have legally tendered contracts in place with local dairies.
- In the case of Local Authorities, primary schools and nurseries if this option were chosen it could mean 2 deliveries of milk from different dairies. This would not be good practice in terms of safety or the carbon footprint.

Organisation C – (industry representative body)

Organisation C does not believe the Nursery Milk Scheme to be a simple procurement exercise nor do we believe that buying power alone (1.75m pints of milk a week) will help ensure greater value for money. The scheme and the way it is structured in the future must address a number of fundamental issues; to control the scheme costs to safeguard its future; to provide sufficient flexibility & choice to childcare providers and provide the opportunity for all milk providers (whether small or large) to successfully compete or 'bid' to supply the nurseries in their area.

Priority must be given to the closing of the loop-hole which has allowed agents and other organisations to charge up to 92p per pint for milk delivered. Whilst 92p per pint represents a gross over-charge the quoting of the retail price of milk will not be realistic to cover the cost of milk delivered to every setting. Furthermore the quotations of 20p - 40p a pint provided in the impact assessment under the summary of analysis and evidence for policy option four are considered extremely low. The current price of milk delivered via doorstep delivery is approximately 65p per pint. There is a real risk that in an effort to drive as much cost out of the scheme as possible the only way to service the scheme is to import milk or source UHT long life milk. This would be to the detriment of the scheme, nurseries, parents, children and a large part of the UK dairy supply chain.

Organisation C proposes that consideration be given to an alternative option, which operates on a postcode basis and helps to engender competitive pricing / charging for the collection of fallen livestock from farms. Under such an option ('Option 5') each school milk provider would be required to submit a competitive bid to service settings / childcare

providers in a given postcode. Once a bid is submitted the milk provider would be obligated to supply any setting in that postcode. An administrative body would be required to process the bids and if necessary assess the bids against an upper and lower threshold for the postcode. The aim would be to eliminate uncompetitive bids whilst preventing aggressive under-cutting.

Organisation D – (commercial organisation)

The proposed scheme, we believe will not only put prices paid to farmers at risk, but also impact on and put packaging suppliers within the dairy industry (which have invested in machinery, equipment and staff required to support this areas of the milk industry) in jeopardy. We are concerned that the impact on the overall supply chain has not been taken into consideration through the consultation and style of questioning.

Organisation E – (commercial organisation)

Having studied the consultation document in full, we would like to propose a variation of the third consultation option, which we believe could deliver significant cost savings per child and increased efficiency and auditability on behalf of the Government. A closed loop process ensuring the funds and vouchers are traceable and auditable throughout the lifecycle of the scheme. This will make it possible to trace the request, allocation and payment of funds for milk at every step of the process.

Organisation F – (industry representative body)

It is not appropriate to compare directly the per pint price of milk that consumers will be familiar with paying their supermarket or milkman with the cost per pint of supply of milk under the nursery milk scheme. The price of 92p per pint is we understand the highest claimed under the scheme as quoted in the consultation scheme. A more useful figure to share alongside this would be the average price paid under the scheme. We believe that there are a number of drivers for the increase in the cost of the nursery milk scheme, including greater awareness and uptake of the scheme by childcare providers, population growth in the under fives and an increase in the number of under fives in childcare settings. The price of milk has also increased in recent years.

The government's recent commitment to extend free nursery places to up to 300,000 less advantaged two year olds is a huge opportunity to make a difference to the educational and health outcomes of our most vulnerable under fives. Early intervention in children's nutrition as highlighted by the Marmot review is vital to address long-term health inequalities. The Nursery Milk Scheme should be promoted and welcomed as a successful intervention, with measures taken to ensure the scheme is funded adequately for the long term. Reduction of administrative burdens on childcarers is a key theme in the Childcare Commission established in July to look at issues to improve availability and affordability for parents. Presently a significant proportion of organisation F's nursery members use specialist agents and most report finding the service effective and saving on administration. Any reform should ensure that no additional administrative burden is placed on childcare providers.

We understand EU funding is available and has been successfully drawn down in the past by some nursery milk suppliers. We would urge DoH to examine the opportunity to reclaim the UK's full entitlement from the EU to offset the cost of the scheme to the taxpayer.

Organisation G – (Social enterprise organisation)

Organisation G's proposal for a way forward: to provide 1.5million children in a childcare setting, for more than 2 hours, with a serving of milk. Its proposal contained suggestions addressing the following core issues:

- Establishment of a Database
- Farmer Recruitment
- Processing and Distribution
- Promotion
- Environment and Sustainability
- Financing

Organisation H – (commercial organisation)

Editor's note - Organisation H provided a lot of very useful data on capping options at different price points, together with its own cost analysis of the different options in the consultation. It was not considered appropriate to include this extensive cost analysis data within the confines of this report. However, the Department of Health has full access to all the data submitted which is readily accessible by its policy team to review when preparing the full impact assessments and developing the future policy for the Nursery Milk Scheme

Organisation H would preface its comments with the statement that while we agree that some of the prices charged through the scheme are too high, we do not feel that it is accurate to attribute rising costs solely to the involvement of agents.

The real issue, of course, is that currently the Department of Health has little control over the price that it is being charged for nursery milk.

The tone of the consultation document and the manner in which a number of the questions are framed has given cause for concern - most particularly, by focussing solely on pints thereby failing to address fully the importance of single servings of 189 ml ("Thirds"). Organisation has always understood that 'thirds' play a critical part in encouraging access and take up (and thereby the incorporation of milk into the diet of under 5s). Many settings will simply give up providing milk altogether if not delivered in Thirds. This is primarily for two reasons: Thirds suit schools and other settings with limited facilities (any other serving creates administrative and cost burdens) and Thirds suit children and staff for a variety of reasons (e.g. milk can be drunk from a straw, during break times outside).

It is apparent that in the options as proposed within the consultation document there are considerable costs transferred to the settings

The Welfare Food Regulations 1996 are made under section 13 of the Social Security Act 1988. Thus, the statutory purpose of the scheme and the scope of any proposed

amendments to the Regulations must be to ***“help and encourage children to have access to and to incorporate in their diets, milk”***.

We note that the Department has undertaken an online Survey of Childcare Providers – it does not appear that two important aspects – that price reflects the total cost of providing milk to children in their settings (i.e. delivered), in the format that the settings require, in particular access to Thirds - has been properly investigated and in any event, it is unclear the extent to which any response to the survey would be representative.

The consultation document fails to include reasonable estimates of the cost and timescales of carrying out a national procurement exercise of the scale and complexity proposed. It also fails to recognise the on-going contract management costs involved in delivering a scheme of this scale.

Critically, the consultation documents recognise that there may need to be flexibility in Option 4 and that there may need to be provision in Thirds in some circumstances. If the Department of Health accepts the important role Thirds plays in access and encouraging the incorporation of milk into the diet of under- 5s, this calls into question the financial forecasting. The figures would need significant amendment to allow for widespread provision of Thirds. Thus, the proposed savings under Option 4 could not be as suggested.

Many local authorities have contracts in place with milk suppliers – these can be up to five years in duration.

The consultation fails to examine the effect of the options on the provision of milk to children over the age of five in educational settings. Furthermore, if there is no option for over-fives, the provision of milk to under-fives in reception class becomes too inequitable and divisive. This is because in a class of four year olds who receive milk through the Nursery Milk Scheme, as soon as one of them turns five, that child is no longer entitled to the free milk. With no over-fives scheme, that child will have to suffer the ignominy of sitting and watching their peers receive something to which they are no longer entitled.

Organisation H is one of a number of agents which supports settings to participate in the Nursery Milk Scheme. Agents, through their expertise and investments, have driven significant efficiencies and cost savings for local authorities, settings and dairies. By administering the scheme for settings, agents minimise the burden for settings, manage the supply of milk and promote the scheme to settings and parents.

There have been a number of new entrants into this market during the last three years. Many of these new companies have sought to incentivise new business by offering retail gift vouchers or free bread and vegetables, which is subsidised by the excessive price that they charge to the Department of Health for the milk provided. From discussions with settings we are aware that some of these operators inflate their revenue by openly encouraging settings to claim the theoretical maximum number of servings based on the maximum number of children they are allowed to care for (known as their “OFSTED quantity”) and the maximum number of sessions that they are authorised to open. In doing so, these operators disregard the pertinent facts, namely (i) the number of children that actually attend each session; (ii) the actual number of sessions; and (iii) the number

of children that attend both the morning and afternoon sessions at the same setting on the same day, and therefore only qualify for one free portion. The majority of the settings would probably be unaware of the resulting over-claim, as they take these operators' advice as to their eligibility. This practice has been highlighted to us on numerous occasions when settings leave another operator and begin working with Organisation H. These settings often find that they are actually eligible to receive less milk than previously supplied to them.

Organisation H asked Dr Michie, currently Chair of the Nutrition Committee in the Royal College of Paediatricians and Child Health and one of the leading Paediatric Consultants in the country, to give a brief report on the health benefits of milk to children. His report (summarised in H's response) highlights the growth characteristics of children under 5, the role that milk plays in helping provide essential dietary requirements (in particular energy, protein, water and a range of micronutrients), as well as outlining some disadvantages of using cow's milk as regular food item (including lactose intolerance and allergies).

We believe that the Department of Health could save £12.25 million per annum through the claiming of the EU subsidy (£9.11m per annum) and UK Government top up / DEFRA subsidies for milk in settings (£3.14m per annum).

An independent analysis commissioned by Organisation H suggests that the savings proposed for Options 2 to 4 in the Impact Assessments are overstated, the key reasons that these savings are overstated are as follows:

- Year on year 3p price increase is overstated; the remaining market available to agents is shrinking (Option 1).
- Costs in the consultation analysis are shifted from the Department of Health to other settings and Local Authorities, but are nevertheless still real costs (Options 2 and 3).
- Milk needs to be provided in one thirds of a pint as well as larger units of measure to meet the needs of the settings and the children. Not doing so will lead to a reduction in children drinking milk (Options 2 – at the cap proposed, 3 and 4).
- Delivered milk cannot be purchased at the target prices in appropriate units of measure (Options 2, 3 and 4).
- Supermarket prices are not an appropriate price benchmark (Options 2 and 3).
- The technical, process challenges and lead time of an e-voucher scheme render it unworkable (Option 3).

While the consultation implies that in recent years the cost of the scheme has increased solely as a result of agents increasing their prices, in actual fact this price increase is the result of a number of separate factors:

- increasing numbers of children drinking milk;
- a shift of settings to agents from self-claims;
- opportunistic new agents entering the market and driving up the cost per unit; and
- the Department of Health ceasing to claim the available subsidies.

The future scheme costs associated with more settings moving to agents are overestimated:

- most settings are now aware of the scheme; agents have talked to them and most of those wishing to run a milk scheme are already doing so (either self-claiming or through an agent).
- most settings self-claiming have already been approached by agents and would have moved to using an agent if they wished to.

This consultation option acknowledges the need for settings to “go shopping” in supermarkets for milk in large units of measure and to self-administer claims. This removes cost from the Department of Health budget but shifts the cost to the settings and therefore to other Government departments and local authorities. Using setting staff to run the milk scheme (*sic administration*) also impacts upon the staff’s ability to perform their primary role of caring for and educating children. Other practical considerations regarding the administrative shift to settings include:

- The use of personal vehicles to collect the milk, the need for business vehicle insurance to cover this and the need for settings to reimburse staff for the expenses incurred.
- The practical challenges involved in collecting the volume of milk required for larger settings.
- Making fewer trips to save time causes storage problems for settings.
- The requirement for working capital and petty cash, business credit cards, and/ or processes and complexities for personal expense claims.

Food safety regulations: compliance with regulations for safe transportation and manual handling of produce. It is unclear whether personal vehicles are suitable for this purpose.

Organisation H commissioned the Office for Public Management (OPM) to conduct an independent survey of the settings it supplies as part of the Nursery Milk Scheme. All Organisation H-supplied child-minders (c.4,000) and all Organisation H-supplied nurseries and schools (c.18,000) were sent an introductory email explaining that Organisation H was seeking their views in order to inform its response to the Government consultation.

Survey of child-minders supplied by Organisation H

476 responses received from childminders across England and Scotland and Wales,

- 99% of respondents agreed that regular milk provision is good for children’s health
- 66% said that regular milk provision has a positive impact on children’s behaviour and concentration
- 38% agreed with the statement that ‘some of the children I look after do not have healthy diets at home’.
- 36% now benefitting from the nursery milk scheme were made aware of it by Organisation H.
- 72% agreed (54% strongly) with the statement they spend less time organising milk purchasing, delivery than they used to before Organisation H started delivering their service.
- 71% said they would need to spend more time organising milk deliveries themselves if the Organisation H service ceased.
- 64% agree that milk consumption amongst their children has increased since they took up the Organisation H service, compared to 20% who say it has not.

Survey of school / nursery settings supplied by Organisation H

2,162 responses were received from schools and nurseries of different sizes across the England, Scotland and Wales,

- 97% believe that regular milk provision is good for children's health.
- 60% agree regular milk provision has a positive impact on children's behaviour and concentration.
- 34% of Organisation H-supplied schools / nurseries had become aware of the Nursery Milk Scheme from Organisation H.
- 87% agree that milk provision organised through Organisation H is easy to run 'with very little administration required'.
- 78% agree (60% strongly) that they or their colleagues would need to spend more time organising milk deliveries themselves if the Organisation H service ceased.
- 34% of schools / nurseries report that more of their under-fives drink milk at school / nursery than before Organisation H became involved

Organisation H's solution

We believe the solution is to cap the price at 22p per single serving or 66p per pint equivalent and claim the available EU and UK subsidies, because the current system works in servicing the market and allows universal access to milk in settings to under 5's.

The solution has built in flexibility for those settings which cannot reasonably obtain milk at this cap (e.g. geographical factors and special population groups). The flexibility proposed (which is set out in this response) would be simple, easily implemented and it is anticipated, only be required in very few cases. The cap, which would govern the overwhelming majority of provision, would have to be updated each year based on a recognised index. This option also causes the least disruption to the existing system and therefore will be more palatable to key stakeholders - children and childcare settings.

Organisation J (not for profit organisation)

(In the impact assessment) DH anticipates additional running costs (either one-off set up costs and/or higher annual running costs), but does not disclose its own internal running costs; nor does it attempt to quantify external running costs incurred by others, such as local authorities and childcare establishments.

None of the 4 options cited in the consultation document provides the optimum outcome in terms of practical policy delivery or cost effectiveness. Option 1 (do nothing) would simply prolong the inefficiencies of the current arrangements and is unacceptable to the taxpayer. Options 2 (price capping) would need to be variable across the country, require constant review, and tends to cause the market to price up to it. Option 3 (e-vouchers) may lead to surplus public money in the system, although in practice the market is likely to price up and price out any prospective under-spending! Option 4 (direct supply) is the best option as it is described, but with further adaptation it is possible to employ the benefits of option 4 and substitute its dis-benefits with further enhancements to provide a solution to meet all of the Government's policy aims and implementation objectives.

Organisation J provided details of its own business model, which it considers to be an alternative model for running the Nursery Milk Scheme. It provides for an outcome based

on 'localism' in line with Government policy whereby even small local traders can feel at ease with the prospect of supplying public sector requirement. This solution also provides for local authorities to be completely relieved of the burden and administrative cost of current responsibilities in sourcing milk on behalf of nurseries in their areas. In practical terms, this means introducing arrangements whereby suppliers offer a service at competitive prices (set for, say, one year) within a defined geographical area (e.g. post codes) and customers select which supplier to use. DH could impose a reimbursement cap linked to a transparent formula which could, for example, include the lowest priced offered in a geographical area and/or an average quoted in the same area, leaving nurseries to pay the difference if they wish to use a different supplier. This arrangement benefits from a truly competitive market; it avoids the need for DH to become involved in price fixing or procurement, and also gives customers the flexibility to choose their supplier. It provides for geographical price variations and surcharges for special local circumstances. Also, suppliers may join consortia if they wish. Meanwhile, DH has satisfied its duty to finance free school milk cost efficiently. There is also a built-in safeguard that if a supplier defaults, the customer simply appoints a new supplier immediately from the central register of pre-qualified suppliers. The risk of losing business should ensure that suppliers maintain high standards.

Organisation K (Industry representative body)

We believe **Q1.1 Do you think that paying 92p for a pint of milk is a good use of public money** to be a leading question, as there is very considerable divergence in the settings delivered to, ranging from the supply of bulk whole milk to a nursery as part of a LEA supply contract, and delivery of 1/3 pint cartons or portions of organic or Kosher milk to small childminders in remote locations.

Q1.1b If no, what do you think would be a reasonable price for the taxpayer to pay for a pint of milk? This simple question does not necessarily take into account the diversity of provision of this universal benefit as described above

(Option 2) Q2.1 In what range should the maximum price be set? Please note the average price of milk in 2011 was quoted at 45p per pint. This figure does not thoroughly reflect a comparable "average" price of milk during 2011 in relation to milk supplied and delivered to individual settings in diverse packaging under the Nursery Milk scheme. A more comparable figure may be the average of the doorstep price of milk, which for the period was c. 65p per pint. We suggest a **single price cap** in the region of **65 to 69p per pint**, with the provision of regular reviews. This range of prices is derived from general data available to Organisation K and is the level that we believe allows for the delivery of 1/3 pint/189 ml packaged milk to smaller, rural/remote childminders. This type of setting represents the most expensive element of this diverse market, with the LEA / contracted and more accessible deliveries made at significantly lower prices to that of the cap.

Q4.5 What do you think is an appropriate price per pint to charge for supply and delivery of milk? This is a simplistic and leading question as the answer is complex, involving the detailed analysis of the requirements of over 55,000 locations throughout England, Scotland and Wales. It is also worth noting that c. 50% of milk supplied to settings was through LEA nurseries/supply contracts, thus around half of deliveries would be to non- LEA and possibly smaller delivery locations. A further important point is that 1/3 pint packages are widely favoured by customers, and represented 70% of the supply in some areas of the country.

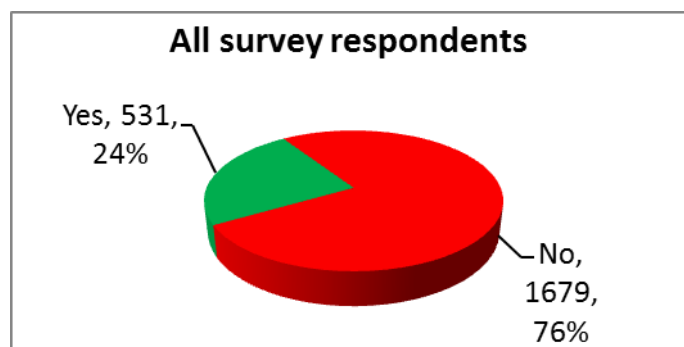
Further issues for consideration.

- The possible impact on nutritional benefits and milk consumption for the under 5s

- Any solution that has an adverse impact on the dairy supply chain - dairy organisations, sector SMEs, local independent milk distributors and dairy farmers, would not be welcome.
- Any unintended consequences/effects on school milk supplies for the over 5s. It is worth noting that any adverse effect on businesses supplying milk under the nursery milk scheme could also have a knock-on effect on the ability for them to supply milk under the EU Subsidised School Milk Scheme, as often, the same businesses are involved in both areas of business.

APPENDIX 1 – DATA DEEMED UNSAFE FOR INCLUSION IN THE MAIN REPORT

SURVEY Q10) If you currently get your milk in a particular type of packaging, would it be an issue if that changed?



Source – 2210 survey respondents. 48 respondents did not answer this question

10a) If you answered yes to question 10, please tell us why.

Reasons why it would be an issue if the packaging type was changed	Mentions
(PROMPTED) We have only a small fridge and large containers will not fit	192
(PROMPTED) The type of packaging we use reduces wastage of milk	108
(PROMPTED) Children drink directly from single serving tetra packs (cartons) and we have no facilities to wash cups or glasses	89
(PROMPTED) The type of packaging we use reduces packaging waste	87
Other (unprompted) reasons	321
<i>Children like / prefer cartons (several said with screw tops or + straw)</i>	37
<i>Easier to store in a fridge</i>	26
<i>Storage of milk a problem</i>	25
<i>Encourages children to drink milk / drink more</i>	22
<i>Independence – children can serve themselves</i>	15
<i>Glass bottle not suitable / dangerous</i>	14
<i>Independence - older children can pour milk and serve themselves</i>	13
<i>Convenient / handy (unspecified)</i>	12
<i>Reduces spillage</i>	11
<i>Recyclable</i>	11
<i>Cartons preferred (unspecified)</i>	10
<i>It's a novelty and appealing</i>	9
<i>Cartons handy for trips</i>	8
<i>We do not have to wash up cups / tumblers</i>	8
<i>Novelty - getting the children to drink from carton</i>	7
<i>We encourage children to drink from cups</i>	6
<i>Delivers the right quantity so all the milk is drunk up</i>	5
<i>Convenient / handy – for children</i>	4
<i>Hygienic</i>	4
<i>Convenient / handy / easier – for staff</i>	4
<i>Large containers too heavy for children to use / self-pour</i>	4
<i>Children like / prefer (small plastic) bottle and straw</i>	3
<i>Save us time (cartons)</i>	3
<i>Issues mentioned twice - can serve themselves – Pergal machine); child can take carton home if not drunk all the milk; easier to transport; cartons produce waste disposal problems; current packaging ensures fresh milk;</i>	10

Miscellaneous other single comments	36
Total mentions	307

Source 531 survey respondents that said 'Yes' to Q10.

The findings in this section should be treated with caution. Respondents did not (in most cases) specify which type of packaging or pack size was involved in relation to any 'issues' they raise if it were changed. It is clear from the comments that some respondents interpreted the question as changing packaging material, whilst others interpreted it as changing pack size. Data in this section based on the full sample is not considered to be reliable or representative of the market generally, and should be treated with caution, in particular views about 1/3 pint single serve containers being replaced with larger (1pint / 1 litre, etc.) containers. However, the findings do provide some extremely valuable insights.

As seen in the pie chart, 1,679 (76%) of the child settings responding to the question did not think that changing their current type of packaging would be an issue for them, compared to 531 (24%) that thought it would.

Of the 531 childcare settings that thought changing packaging would be an issue, their reasons (prompted and unprompted) are summarised below:

Four prompted reason options

- 192 (8.7%) said they only have a small fridge and large containers would not fit in
- 108 (4.9%) said the type of packaging they currently use reduces milk waste
- 89 (4.0%) said children drink directly from single service tetra packs (cartons) and they have no facilities to wash cups or glasses
- 87 (3.9%) said the type of packaging they use reduces packaging waste

Other (unprompted) reasons

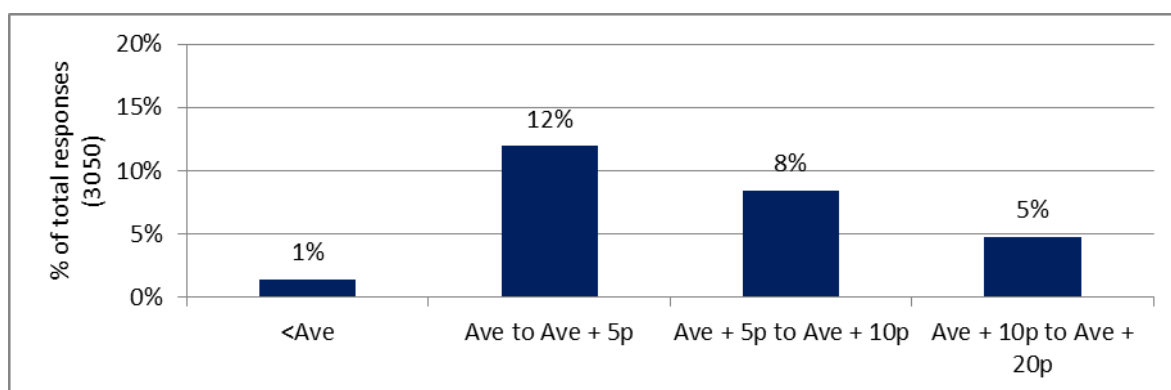
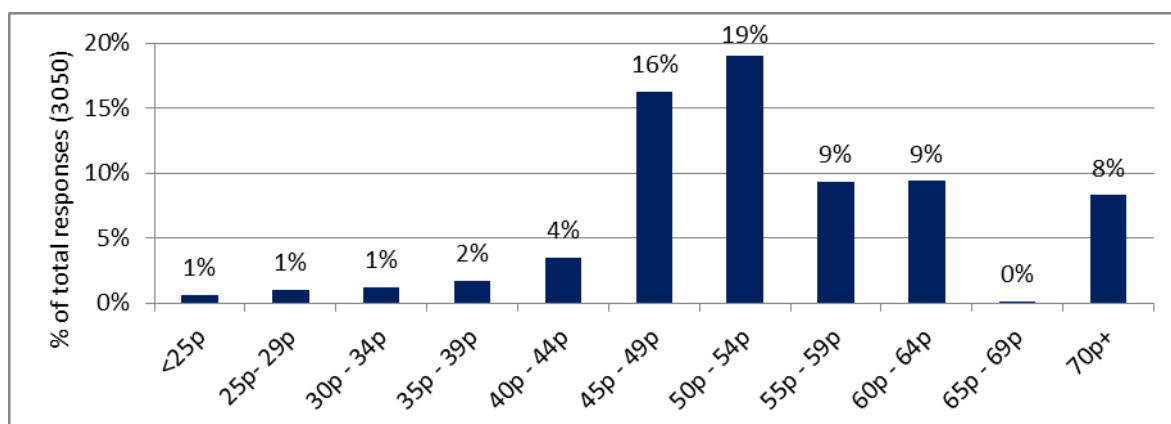
- 228 (10.3%) gave 307 other reasons (167 gave one reason, 61 two or more)

One way to help understand how a change in packaging type might impact on a childcare setting is by analysing responses compared to how settings currently serve their milk, as shown in the table below (for the 12 most frequent reasons).

	How settings serve the milk to children		
Reasons why packaging change would be an issue for the setting	Milk served in single serve tetrapaks ONLY	Milk poured into drinking bottles or cups ONLY	Served in BOTH tetrapaks and poured into cups or drinking bottles
<i>Children like / prefer cartons (37)</i>	30%	65%	5%
<i>Easier to store in a fridge (26)</i>	23%	73%	4%
<i>Storage of milk a problem (25)</i>	24%	72%	4%
<i>Encourages children to drink milk / drink more (22)</i>	23%	68%	9%
<i>Independence – children can serve themselves (15)</i>	53%	47%	0
<i>Glass bottle not suitable / dangerous (14)</i>	21%	79%	0
<i>Independence - older children can pour milk and serve themselves (13)</i>	31%	62%	8%
<i>Convenient / handy (12)</i>	33%	67%	0
<i>Reduces spillage (11)</i>	9%	82%	9%

<i>Recyclable (11)</i>	36%	64%	0
<i>Cartons preferred unspecified (10)</i>	30%	70%	0
<i>It's a novelty and appealing (9)</i>	11%	11%	7%

CONSULTATION Q2.1 In what range should the maximum price be set?



The research team is concerned that this consultation question quotes prices based on retail milk prices in 2007-2009 (“data from the Family Food Survey suggest little regional variation in milk prices, with the three-year (2007–2009) average price per pint of milk standing at 36p for England and Scotland, and 35p for Wales”) whereas the Department of Health impact assessment (IA No: 3053 16/11/2011), clearly states that “In 2010/11, the average retail price of milk fluctuated between 44p and 45p” (ref IA Evidence Base, page 7). Unfortunately, this may have resulted in asking respondents for their views based on out of date market data, and may have influenced their responses.

Furthermore, many respondents gave views on what they considered the range should be for the maximum price set, but did not specify if it was for milk bought from a retail outlet or for delivered milk, and for the latter if the milk claim administration was carried out by a 3rd party agent. Data in this section based on the full sample is not considered to be reliable or representative of the market generally, and should be treated with caution.

Respondents answered this question in two different ways (either quoting an actual price range, or quoting a price range relative to the average market price).

In both cases, the most common response was a price per pint equivalent to somewhere between 45p and 54p.

2151 of the 3050 consultation respondents answered using an actual price range. Of these, the most common responses were 50p – 54p (19% of respondents overall), and 45p – 49p (16% of respondents overall). Very few suggested the lower price ranges, but there were significant numbers who recommended higher ranges: 9% said 55p – 59p; 9% said 60p – 64p; and 8% said the price should be over 70p.

812 respondents answered using a price range relative to the average market price. The responses were entirely consistent with those quoted using an actual price range. The most common responses were 'Average – Average+5p' (12% of respondents overall), and 'Average+5p – Average+10p' (8% of respondents overall). Again, very few suggested the lower than average prices, but there were significant numbers who recommended the higher range of 'Average+10p to Average+20p' (5% of respondents overall).

APPENDIX 2 - SURVEY AND CONSULTATION QUESTIONNAIRES

CONSULTATION QUESTIONNAIRE

Next steps for Nursery Milk

Consultation document

Next steps for Nursery Milk

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Note – page numbers from the original document have been replaced in the table of contents above to correspond with the page numbers in this report.

About this consultation

1 Introduction

The Nursery Milk Scheme has been running since the 1940s. The scheme currently funds free milk for around 1.5 million children under five years old in 55,000 childcare settings throughout Great Britain.

The Government is committed to retaining the Nursery Milk Scheme. In recent years, however, the prices claimed for milk purchased under the scheme have risen significantly, with a corresponding increase in the total cost of the scheme. The purpose of this consultation is therefore to explore three different options for modernising the scheme, looking at where we can make it more efficient as well as improving its value for money, while ensuring that no parent, child or childcare provider is disadvantaged and that all children under five in childcare settings continue to receive free milk.

We are particularly keen to hear from:

- parents and other primary carers of under fives;
- childcare providers and early years settings (including primary school reception classes) and the organisations that represent them;
- healthcare professionals such as health visitors and dieticians;
- local authorities;
- producers, suppliers, distributors and retailers of milk, and their representative bodies, who are either currently involved in supplying milk under the scheme or would like to be in the future;
- any other interested parties.

This consultation paper and impact assessment are available at:

<http://consultations.dh.gov.uk/nurserymilk/nextsteps>

You can request emailed copies from nmconsultation@dh.gsi.gov.uk. If you have any further questions, please contact:

Adiba Enwonwu
Nursery Milk Consultation
Department of Health
Wellington House, 7th Floor
133–155 Waterloo Road
London SE1 8UG
Email: adiba.enwonwu@dh.gsi.gov.uk

2 Consultation timetable

This consultation will run from 22 May – 14 August 2012.

3 How to give your views

You can find the consultation questions online at

<http://consultations.dh.gov.uk/nurserymilk/nextsteps>.

Alternatively, you can email us at nmconsultation@dh.gsi.gov.uk, or write to us at:

Nursery Milk Consultation
Department of Health
Wellington House, 7th Floor
133–155 Waterloo Road
London SE1 8UG

When commenting by email or post, it would be helpful if you could use the questionnaire accompanying this consultation, which can be found in rich text format at <http://consultations.dh.gov.uk/nurserymilk/nextsteps>

Otherwise, please make it clear which question(s) you are responding to.

4 After the consultation

We will publish a summary of the comments made, and agree a way forward as quickly as possible. To make any significant changes to the Nursery Milk Scheme in Great Britain, we will, with the approval of Parliament, need to change the regulations governing it. The timescale for changing the regulations will depend on decisions made in the light of the response to this consultation, about how the scheme should work in future. New guidance will be made available to all childcare providers registered with the scheme well in advance of any changes coming into effect. Northern Ireland has a similar, but separate, statutory scheme funding the cost of a daily drink of milk for children under five years of age.

5 Criteria for consultation

This consultation follows the ‘Government Code of Practice’. In particular we aim to:

- formally consult at a stage where there is scope to influence the policy outcome;
- consult for at least 12 weeks, with consideration given to longer timescales where feasible and sensible;
- be clear about the process in the consultation documents, what is being proposed, the scope to influence and the expected costs and benefits of the proposals;
- ensure the consultation exercise is designed to be accessible to, and clearly targeted at, those people it is intended to reach;
- keep the burden of consultation to a minimum to ensure consultations are effective and to obtain consultees’ ‘buy-in’ to the process;
- analyse responses carefully and give clear feedback to participants following the consultation;
- ensure officials running consultations are guided in how to run an effective consultation exercise and share what they learn from the experience.

The full text of the code of practice is on the Better Regulation website at:

www.bis.gov.uk/policies/bre/consultation-guidance

6 Comments on the consultation process itself

If you have concerns or comments which you would like to make relating specifically to the consultation process itself, please contact:

Consultations Coordinator
Department of Health
3E48, Quarry House
Leeds
LS2 7UE
Email: consultations.co-ordinator@dh.gsi.gov.uk
Please do not send consultation responses to this address.

7 Confidentiality of information

We manage the information you provide in response to this consultation in accordance with the Department of Health's Information Charter. Information we receive, including personal information, may be published or disclosed in accordance with the access to information regimes (primarily the Freedom of Information Act 2000 (FOIA), the Data Protection Act 1998 (DPA) and the Environmental Information Regulations 2004).

If you want the information that you provide to be treated as confidential, please be aware that, under the FOIA, there is a statutory Code of Practice with which public authorities must comply and which deals with, among other things, obligations of confidence. In view of this, it would be helpful if you could explain why you regard the information you have provided as confidential. If we receive a request for disclosure of the information, we will take full account of your explanation, but we cannot give an assurance that confidentiality can be maintained in all circumstances. An automatic confidentiality disclaimer generated by your IT system will not, of itself, be regarded as binding on the Department.

The Department will process your personal data in accordance with the DPA and, in most circumstances, this will mean that your personal data will not be disclosed to third parties. We may, however, wish to share information provided with the devolved administrations: Scotland, Wales and Northern Ireland (who run their own, similar scheme) in the interests of constructive discussion about how the way forward fits with their overall approach to public health.

8 Summary of the consultation

A summary of the response to this consultation will be made available before or alongside any further action (such as laying legislation before Parliament) and will be placed on the Consultations website at:

www.dh.gov.uk/en/Consultations/Responsestoconsultations/index.htm

The consultation

1 Introduction

The Nursery Milk Scheme reimburses childcare providers for the full cost of purchasing any milk they provide – free of charge – to children in their care. All children under five years old in a day-care or early years setting for two or more hours a day are eligible to receive a free daily drink of milk (1/3 pint). For children under one year old, this is given as infant formula. For the purpose of the scheme, childcare providers include childminders and crèches, as well as private and local authority run nurseries, day-care settings (including Sure Start Children's Centres), and primary school reception classes (where there are under fives) across Great Britain. Currently it is the responsibility of the childcare provider to purchase milk and claim reimbursement from the Nursery Milk Reimbursement Unit.

Childcare providers buy the milk provided to children in their care from a range of sources including supermarkets and corner shops, milk roundsmen, wholesalers, markets and at the farm gate. There are also a number of specialist suppliers or agents who in addition to arranging the supply of milk also claim reimbursement on behalf of childcare providers directly from the Nursery Milk Reimbursement Unit.

Over recent years the prices claimed for milk supplied under the scheme have risen significantly, with some claims as high as 92p a pint. This has driven the total cost of the scheme up from £27m in 2007/08 to £53m 2010/11, and this trend looks likely to continue with costs potentially rising to £76m by 2016. The purpose of this consultation is to explore options for modernising and simplifying the operation of the Nursery Milk Scheme while ensuring that no parent, child or childcare provider is disadvantaged, and to look for ways to further improve its value for money. Nursery milk is a universal benefit, meaning that childcare providers can claim the cost of milk provided to any child, regardless of the child's home circumstances. All the options explored in this consultation ensure that the scheme will continue as a universal benefit. We are consulting across Great Britain on behalf of Scotland and Wales.

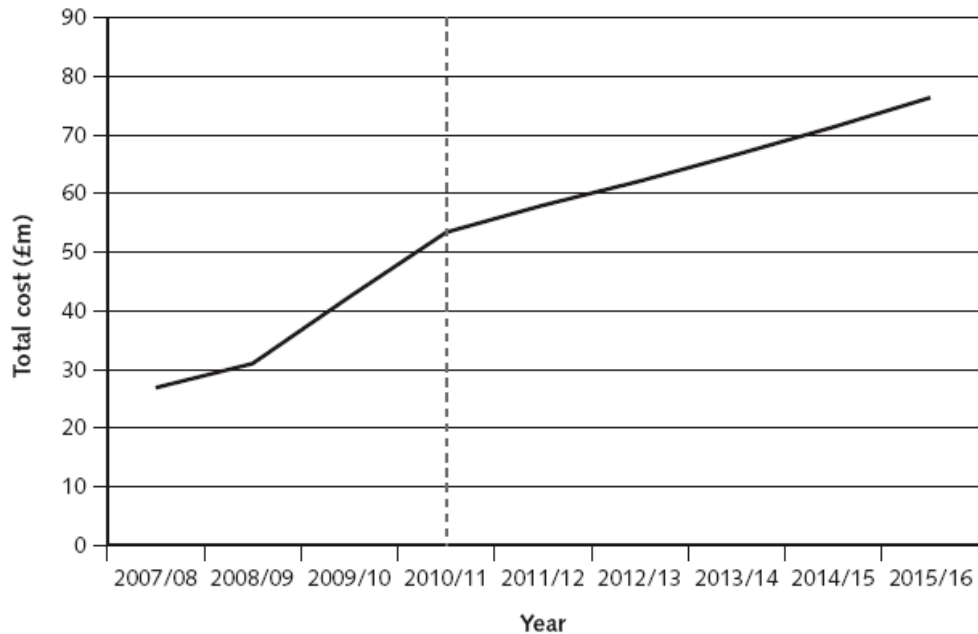
2 The legal framework

Nursery milk is provided through the statutory Welfare Food Scheme (WFS). The Welfare Food Regulations 1996 (GB-wide) are reserved to Westminster; however, the devolved administrations in Scotland and Wales fund milk supplied through the scheme to children in their countries. Northern Ireland provides its own, similar scheme.

3 The options

Option 1 – Do nothing

Figure 1: Past and future costs of the Nursery Milk Scheme



Consultation questions for option 1

For all

Q1.1 Do you think that paying 92p for a pint of milk is a good use of public money?

Yes ☐

No ☐

Q1.1a If yes, please say why.

Q1.1b If no, what do you think would be a reasonable price for the taxpayer to pay for a pint of milk?

Option 2 – Capping the price that can be claimed for milk

In its current form, the legislation governing the scheme provides for full reimbursement of the cost of milk. While childcare providers are encouraged to seek value for money, there is no set limit on the price that can be claimed.

Under this option, an upper limit on the price that could be claimed for milk would be introduced.

Data from the Family Food Survey suggest little regional variation in milk prices, with the three-year (2007–2009) average price per pint of milk standing at 36p for England and Scotland, and 35p for Wales. In special circumstances, where significant local variations exist, arrangements would be put in place to vary the cap for childcare providers who, perhaps due to geographical isolation, do not have access to milk priced at the normal market rate.

Consultation questions for option 2

For all

Q2.1 In what range should the maximum price be set? (tick only one).
Please note, the average price of milk in 2011 was 45p per pint.

- | | |
|---|--------------------------|
| Below 25p per pint | <input type="checkbox"/> |
| 25 to 29p per pint | <input type="checkbox"/> |
| 30 to 34p per pint | <input type="checkbox"/> |
| 35 to 39p per pint | <input type="checkbox"/> |
| 40 to 44p per pint | <input type="checkbox"/> |
| 45 to 49p per pint | <input type="checkbox"/> |
| 50 to 54p per pint | <input type="checkbox"/> |
| 55 to 59p per pint | <input type="checkbox"/> |
| 60 to 64p per pint | <input type="checkbox"/> |
| 65 to 69p per pint | <input type="checkbox"/> |
| Above 70p per pint | <input type="checkbox"/> |
| Below average price per pint | <input type="checkbox"/> |
| Average price to average price + 5p per pint | <input type="checkbox"/> |
| Average price + 5p to average price + 10p per pint | <input type="checkbox"/> |
| Average price + 10p to average price + 20p per pint | <input type="checkbox"/> |

Q2.2 What circumstances other than geographical isolation would affect childcare providers' ability to purchase milk at the normal market rate? (tick all that apply).

Lack of transport ☐

Small number of children looked after ☐

A long way from nearest shops ☐

Special milk required for religious or cultural reasons, e.g. Kosher ☐

Require single-serve packaging ☐

Other – please specify

Q2.3 Is there a risk that introducing a cap, even with the facility to vary the cap in special circumstances, would disadvantage specific population groups? If yes, which population groups do you think would be disadvantaged and why?

Q2.3a If yes, can you suggest how such risks could be mitigated?

Option 3 – Issuing e-vouchers cards with economy incentives

Under this option, childcare providers would no longer have to pay for milk and then claim reimbursement from the Nursery Milk Reimbursement Unit. On joining the scheme, childcare providers would indicate how many children would normally be attending for two hours or more per day. They would then be credited with a prospective monthly payment equal to the number of pints required multiplied by a fixed reimbursement rate, which we would set at an average market price per pint. For stand-alone nurseries, crèches and childminders, this would be credited to an e-voucher card which could only be spent on milk and would be topped up electronically each month. We would aim to have a wide range of producers, suppliers, distributors and retailers accept the e-voucher card, in all parts of GB.

For local authorities with a number of nurseries, who may wish to take advantage of economies of scale by entering into a bulk contract to supply all of their nurseries, monthly payments could be made to a special account that would be ring-fenced for the purchase of milk only. For example, a local authority may contract with one or more suppliers to deliver milk to all the nurseries in its area.

Childcare providers would have to inform the Nursery Milk Reimbursement Unit if the number of children in attendance changed, and reconfirm their details annually.

Consultation questions for option 3

For all

Q3.1 Is there a risk that introducing an e-voucher card would disadvantage specific population groups? If yes, which population groups do you think would be disadvantaged and why?

Q3.1a If yes, can you suggest how such risks could be mitigated?

Q3.2 A childcare provider who sought very good value for money may end up with a small positive balance on the e-voucher card at the end of the year. What should happen to this money? (tick one)

The money should be returned to the Nursery Milk Scheme ☐

The childcare provider should be allowed to keep the money – in order to use the money to buy extra milk for children in their care (which they could use, for example, in preparing the children's meals) ☐

Other – please specify

Q3.3 A local authority who sought very good value for money may end up with a small positive balance in the ring-fenced account at the end of the year. What should happen to this money? (tick one)

The money should be returned to the Nursery Milk Scheme ☐

The local authority should be allowed to keep the money – in order to use it to buy extra milk for children in their care (which they could use, for example, in preparing the children's meals) ☐

Other – please specify

For childcare providers

Q3.4 Would you feel comfortable using an e-voucher card which was updated electronically every month?

Yes ☐

No ☐

For suppliers, distributors and retailers of milk

Q3.5 Do you think there would be a risk of the voucher card being used inappropriately?

Yes ☐

No ☐

Q3.5a If yes, what measures could be put in place to avoid this risk?

Option 4 – Direct supply

Under this option, the Department of Health would contract with a company or companies, or a consortium or consortia of companies (which could include a variety of small local suppliers), for the direct supply and delivery of milk to all childcare providers registered with the scheme at an agreed price per pint supplied and delivered. Our aim would be for the best supplier to be chosen for every local area, to meet local needs under the scheme and offer value for money. Childcare providers would simply register, indicating the number of children in attendance, and then receive the appropriate amount of milk, delivered directly to the doorstep.

It is likely to cost the contractor or contractors slightly more to deliver to childminders with only one or two children in attendance, but the cost per pint to deliver to large nurseries will be very much less. We therefore believe that, by letting a single contract for the delivery of over 1.75 million pints of milk a week, we will be able to achieve both a simple effective system and a very competitive overall price, with the lowest possible burdens on childcare settings.

Indeed, for childcare providers there would be no financial outlay and no need to claim reimbursement or keep receipts. This option would be similar to the way the school fruit and vegetable scheme is run, with fruit and vegetables delivered daily to schools under a central contract.

Consultation questions for option 4

For all

Q4.1 Is there a risk that introducing a direct supply and delivery of milk would disadvantage specific population groups? If yes, which population groups do you think would be disadvantaged, and why?

Q4.1a If yes, can you suggest how such risks could be mitigated?

For producers, suppliers, distributors and retailers of milk

Q4.2 Would you be interested in participating in the direct supply of milk to childcare providers, either to supply the whole country yourselves or as part of a consortium?

Yes ☐

No ☐

Q4.3 Are there any parts of the country that you think would be difficult to supply under this model?

Yes ☐

No ☐

Q4.3a If yes, please state where.

Q4.4 Are there any types of childcare provider that you think would be difficult to supply under this model?

Yes ☐

No ☐

Q4.4a If yes, please state what types.

Q4.5 What do you think is an appropriate price per pint to charge for supply and delivery of milk?

Q4.6 What ideas do you have for ways the scheme could operate more efficiently in the future, including supply chain options?



4 Further simplification

Under all four options, including option 1 (do nothing), we will continue with work currently underway to make minor changes to improve the way the scheme operates. For example, in parallel with this consultation, we will be asking childcare providers currently registered with the scheme to confirm their details to ensure that our database is completely up to date. We will also be:

- making a minor change to the online claim form to make claiming easier;
- encouraging as many childcare providers as possible to claim online and get paid more quickly;
- changing the reimbursement process slightly to fix a problem that sometimes occurs when childcare providers change suppliers in the middle of a month;
- asking childcare providers to complete a simple survey to find out more about how the scheme works for them now.

We would also like to change the time limit for making a claim (relevant to options 1 and 2 only). Childcare providers currently have up to two years to make a claim for milk supplied under the scheme. While the majority of childcare providers claim promptly each month, some do not. This complicates administration of the scheme and makes it hard to plan and forecast expenditure. We would like to reduce the time limit from two years to six months.

Consultation questions on time limit for making a claim

For childcare providers

Q5.1 Is six months a sufficient time period within which to claim reimbursement?

Yes ☐

No ☐

Q5.2 If no, what time period would be sufficient?

5 What is the best way forward for Nursery Milk?

The four proposed options offer different advantages and disadvantages for simplifying the current scheme.

Under option 1, do nothing, the responsibility for buying milk and claiming reimbursement remain with the childcare provider or local authority, though they may use an agent to claim on their behalf.

Under option 2, capping, childcare providers retain the flexibility to buy from any supplier they choose, provided the price is below the maximum capped rate, but may still have to pay for milk themselves and claim for reimbursement. They could also choose to receive milk from an agent who would claim reimbursement on their behalf, provided that this could be done within the maximum capped rate.

Option 2 would help improve value for money but we would need to look at special cases where milk could not be obtained at the normal market rate.

Under option 3, e-vouchers, childcare providers again retain the flexibility to choose their supplier. They can even choose to pay high prices for milk provided they seek lower-priced milk often enough to stay within the overall amount loaded onto their e-voucher card. For example, a childminder might generally buy milk from a supermarket that is driving distance away but may appreciate the flexibility to occasionally buy from a shop which is closer and more convenient but also more expensive.

Under option 4, direct supply and delivery, childcare providers would lose the flexibility of choosing their own supplier, but would incur no financial outlay and be guaranteed a high-quality service, direct to their doorstep.

Options 3 and 4 would relieve childcare providers of the need to pay for milk themselves and then claim reimbursement. Option 4 has the lowest burden for childcare providers and would improve the value for money of the scheme.

Consultation questions on the way forward

For all

Q6.1 Which of the three options for change do you prefer? Please rank the options in order of preference (1–3), with 1 indicating the most preferred.

Option 2 – Capping the price that can be claimed for milk ☐

Option 3 – Issuing e-vouchers with economy incentives ☐

Option 4 – Direct supply ☐

For childcare providers and local authorities

Q6.2 Do you currently buy your milk from a milk roundsman, specialist supplier (agent) or through any other arrangement where you contract in advance for milk to be supplied?

Yes ☐

No ☐

Q6.2a If option 2, 3 or 4 were to be introduced, which resulted in your needing to change or end your current arrangements, how much notice would you need to give your current milk supplier?

None ☐

1 month ☐

2 months ☐

3 months ☐

4 months ☐

5 months ☐

6 months ☐

More than 6 months ☐

Other – please specify

Q6.3 Do you have any ideas for suitable options which have not been mentioned in this consultation document?

NURSERY MILK SCHEME - SURVEY FOR CHILDCARE SETTINGS

Nursery Milk Scheme Survey for Childcare Settings

This survey asks some questions about your organisation and the milk you provide to children as part of the Nursery Milk Scheme. In answering the questions, include only the milk paid for under the Nursery Milk Scheme and not any other milk you might purchase for staff use or for the preparation of the children's meals. This information will help us to ensure that the scheme is operating fairly and effectively. We manage the information you provide in accordance with the Department of Health Information Charter. Information we receive, including personal information, may be published or disclosed in accordance with the access to information regimes (primarily the Freedom of Information Act 2000 (FOIA), the Data Protection Act 1998 (DPA) and the Environmental Information Regulations Act 2004)

Anonymised data may be shared with commercial milk suppliers and colleagues in the health departments of Scotland and Wales.

This survey should be completed by the individual childcare setting providing daily milk to children.

Section one: about your organisation

A) Please enter your Nursery Milk Reimbursement Unit Number:

B) What country (or countries) do you operate in (tick all that apply):

- ☐ England
- ☐ Scotland
- ☐ Wales

C) What type of organisation are you? (tick all that apply)

- ☐ Childminder
- ☐ Nursery
- ☐ Early years education
- ☐ Independent Preschool
- ☐ Charity Preschool
- ☐ Workplace crèche

☐ Other (please state) _____

D) Are you certified by (tick one box):

- ☐ Ofsted
- ☐ Care and Social Services Inspectorate Wales (CSSIW)
- ☐ Scottish Care Commission
- ☐ Independent Schools Inspectorate (ISI)
- ☐ Not certified

E) How many staff do you employ (tick one box)?

- ☐ Less than 20 staff
- ☐ 21-50 staff
- ☐ 50+ staff

We'd like to know more about how many children under five you look after and when you look after them:

F) How many of the children under five you look after stay all day?

How many of the children under five you look after stay in the morning only?

How many of the children under five you look after stay in the afternoon only?

Fill out all boxes that apply:

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
All day							
Morning only							
Afternoon only							

Section two: how you use the Nursery Milk Scheme

1) Where do you buy or order the milk that is paid for under the Nursery Milk Scheme?

(Tick all boxes that apply.)

- ☐ supermarket
- ☐ corner shop
- ☐ milk rounds men
- ☐ farm gate
- ☐ wholesaler
- ☐ market
- ☐ local authority
- ☐ specialist supplier (choose below)

- ☐ Braeforge LTD T/A Pensworth
- ☐ Cool Milk
- ☐ Craigs Farm Dairy
- ☐ D & B Diaries
- ☐ Hope Dairy
- ☐ Johal Dairies
- ☐ Kidsunlimited
- ☐ Kidzmilk
- ☐ Milk Factory Limited
- ☐ School Milk Services
- ☐ Scotts Distribution
- ☐ Wells Farm Dairy
- ☐ Woodside Farm Distribution

☐ Other - please state _____

2) Do you get milk delivered to your premises? (Tick one box)

- ☐ Yes
- ☐ No

Section three: the milk you use as part of the Nursery Milk scheme

3) What kind of milk do you buy or order under the Nursery Milk scheme? (Tick all boxes that apply)

- ☐ whole milk
- ☐ semi skimmed milk
- ☐ skimmed
- ☐ Kosher milk
- ☐ Organic
 - ☐ whole milk
 - ☐ semi skimmed milk
 - ☐ skimmed
- ☐ soya
- ☐ rice
- ☐ infant formula
- ☐ follow on formula
- ☐ other special – please specify _____

3a) If you ticked boxes other than for standard whole, or semi-skimmed milk or infant formula in question 3, please tell us more about why you buy other types of milk. (Tick all boxes that apply)

- ☐ because of your own religious or cultural beliefs
- ☐ to fit in with the religious or cultural beliefs of the families of children in your care
- ☐ because of your own beliefs about the health benefits of different types of milk
- ☐ to fit in with the beliefs about the health benefits of different types of milk held by the families of children in your care
- ☐ to meet the needs of children in your care who have allergies or intolerances
- ☐ other – please explain _____

4) Are there any children in your care who, because of their religion or cultural beliefs, or disability, or special needs, or for any other reason, cannot benefit fully from the Nursery Milk Scheme? If so, please tell us about them.

5) How often do you buy or order milk? (tick one box)

- ☐ every day
- ☐ every other day
- ☐ once a week
- ☐ fortnightly
- ☐ monthly
- ☐ other, please specify (e.g. each term, twice a year) _____

6) How much milk do you buy or order each time? (Please say the total number of pints or litres that you buy each time) _____pints/litres

7) What size of bottle or pack do you normally buy or order milk in? (tick all that apply)

- ☐ 1/3 of a pint
- ☐ 250 ml (1/2 pint)
- ☐ 1 pint
- ☐ 1 litre
- ☐ 2 litres
- ☐ 4 litres
- ☐ 6 litres
- ☐ other – please state _____

8) What type of container do you get your milk in? (tick all that apply)

- ☐ glass bottle
- ☐ plastic bottle
- ☐ plastic bag
- ☐ tetra pack (carton)
- ☐ other – please state _____

9) How is the milk served to the children? (tick all that apply)

- ☐ drinking directly from a single-serve tetra pack (carton)
- ☐ poured into a reusable bottle or feeding cup
- ☐ poured into reusable cups
- ☐ poured into disposable cups
- ☐ other – please state _____

10) If you currently get your milk in a particular type of packaging, would it be an issue if that changed? (tick one box)

- ☐ yes
- ☐ no

10a) If you answered yes to question 10, please tell us why? (tick all boxes that apply)

- ☐ children drink directly from single-serve tetra packs (cartons) and we have no facilities to wash cups or glasses
- ☐ we have only a small fridge and large containers will not fit
- ☐ the type of packaging we use reduces packaging waste
- ☐ the type of packaging we use reduces wastage of milk
- ☐ other – please explain _____

11) How often do you claim from the Nursery Milk reimbursement unit? (tick one box)

- ☐ monthly
- ☐ every second month
- ☐ quarterly
- ☐ twice a year
- ☐ annually
- ☐ longer
- ☐ we use a specialist supplier to manage our claims
- ☐ other – please state _____

12) What influences how you buy or order your milk? (Please rank your top 3 influences on a scale of 1 to 3, with 1 as most important)

- ☐ convenience
- ☐ loyalty
- ☐ price
- ☐ quality
- ☐ service
- ☐ packaging type available
- ☐ other – please state _____

13) How much do you pay for milk (i.e. for each unit of milk as ticked in question 7 above)? (fill out all boxes that apply)

- ☐ pence per 1/3 of a pint
☐ pence per 250 ml (1/2 pint)
☐ pence per 1 pint
☐ pence per 1 litre
☐ pence per 2 litres
☐ pence per 4 litres
☐ pence per 6 litres
☐ pence per other quantity – please state _____
☐ do not know

14) Any other comments about the Nursery Milk Scheme

THANK YOU

Nursery Milk Team

For more information about the Nursery Milk Scheme please visit www.nmru.co.uk
or email nurserymilk@dh.gsi.gov.uk

APPENDIX 3 –SURVEY QUESTIONS CROSS TABS

Survey Q1 – data cross tabulation

Q1							
All responses	Delivery supplier (only)	Delivered & retail	Retail (only)	LA (unspecified method)	Misc. response		Total
	1846	36	340	25	8		2255
	82%	2%	15%	1%	0%		100%
By region	Delivery supplier (only)	Delivered & retail	Retail (only)	LA (unspecified method)	Misc. response		Total
England	1672	30	287	20	4		2013
	83%	1%	14%	1%	0%		100%
Scotland	92	2	35	3	4		136
	68%	1%	26%	2%	3%		100%
Wales	65	4	16	2	0		87
	75%	5%	18%	2%	0%		100%
Not answered	18	0	2	0	0		20
	90%	0%	10%	0%	0%		100%
Total	1847	36	340	25	8		2256
	82%	2%	15%	1%	0%		100%
By type of organisation	Delivery supplier (only)	Delivered & retail	Retail (only)	LA (unspecified method)	Misc. response		Total
Charity Preschool	275	8	81	4	1		369
	75%	2%	22%	1%	0%		100%
Nursery	437	13	78	8	4		540
	81%	2%	14%	1%	1%		100%
Play group	12	1	3	0	0		16
	75%	6%	19%	0%	0%		100%
Child minder	1015	10	149	3	2		1179
	86%	1%	13%	0%	0%		100%
Child care centre	5	0	2	0	0		7
	71%	0%	29%	0%	0%		100%
Local Authority	1	0	1	1	1		4
	25%	0%	25%	25%	25%		100%
Early education (unspec.)	86	4	25	9	0		124
	69%	3%	20%	7%	0%		100%
Misc. other	6	0	1	0	0		7
	86%	0%	14%	0%	0%		100%
NR	9	0	0	0	0		9
	100%	0%	0%	0%	0%		100%
Total	1846	36	340	25	8		2255
	82%	2%	15%	1%	0%		100%
By number of staff	Delivery supplier (only)	Delivered & retail	Retail (only)	LA (unspecified method)	Misc. response		Total
<20	1643	33	289	9	7		1981
	83%	2%	15%	0%	0%		100%
21 - 50	126	2	26	11	0		165
	76%	1%	16%	7%	0%		100%
50+	21	0	8	4	0		33
	64%	0%	24%	12%	0%		100%
Not answered	56	1	17	1	1		76
	74%	1%	22%	1%	1%		100%
Total	1846	36	340	25	8		2255
	82%	2%	15%	1%	0%		100%
2255 respondents answered this question. 3 did not respond.							

Survey Q2 – data cross tabulation

Q2			
All responses	Yes	No	
	1	2	Total
	1966	280	2246
	88%	12%	100%
By region			
	1	2	Total
England	1775	235	2010
	88%	12%	100%
Scotland	107	29	136
	79%	21%	100%
Wales	70	15	85
	82%	18%	100%
NR	15	1	16
	94%	6%	100%
Total	1967	280	2247
	88%	12%	100%
By type of organisation			
	1	2	Total
Charity Preschool	292	77	369
	79%	21%	100%
Nursery	502	37	539
	93%	7%	100%
Play group	13	2	15
	87%	13%	100%
Child minder	1030	146	1176
	88%	12%	100%
Child care centre	5	2	7
	71%	29%	100%
Local Authority	4	0	4
	100%	0%	100%
Early education (unspec.)	108	16	124
	87%	13%	100%
Misc. other	7	0	7
	100%	0%	100%
NR	5	0	5
	100%	0%	100%
Total	1966	280	2246
	88%	12%	100%
By number of staff			
	1	2	Total
<20	1716	260	1976
	87%	13%	100%
21 - 50	161	4	165
	98%	2%	100%
50+	32	1	33
	97%	3%	100%
NR	57	15	72
	79%	21%	100%
Total	1966	280	2246
	88%	12%	100%
2246 respondents answered the question, 4 people did not answer.			

Survey Q3 – data cross tabulation

Q3							REASON A	Families' beliefs about the health benefits				
							REASON B	Your own beliefs about the health benefits				
							REASON C	To meet the needs of children with allergies or intolerances				
	Wholomilk	Semi-skimmed	Organic (all types)	Soya	Infant formula		REASON A	REASON B	REASON C			
All responses	1	2	3	4	5	Total	6	7	8	9	10	
	1407	1452	181	46	54	2248	57	49	48			
	63%	65%	8%	2%	2%	100%	3%	2%	2%	0%	0%	
By region	1	2	3	4	5	Total	6	7	8	9	10	
England	1237	1326	170	39	50	2007	51	45	42			
	62%	66%	8%	2%	2%	100%	3%	2%	2%	0%	0%	
Scotland	105	55	7	4	1	135	3	3	4			
	78%	41%	5%	3%	1%	100%	2%	2%	3%	0%	0%	
Wales	52	60	3	2	3	87	3	1	1			
	60%	69%	3%	2%	3%	100%	3%	1%	1%	0%	0%	
Not answered	13	11	1	1	0	12	0	0	1			
	108%	92%	8%	8%	0%	100%	0%	0%	8%	0%	0%	
Total	1407	1452	181	46	54	2241	57	49	48	0	0	
	63%	65%	8%	2%	2%	100%	3%	2%	2%	0%	0%	
By type of organisation	1	2	3	4	5	Total	6	7	8	9	10	
Preschool	161	247	8	9	1	369	3	3	8			
	44%	67%	2%	2%	0%	100%	1%	1%	2%	0%	0%	
Nursery	409	328	42	25	25	540	14	10	24			
	76%	61%	8%	5%	5%	100%	3%	2%	4%	0%	0%	
Play group	8	8	0	0	0	16	0	0	0			
	50%	50%	0%	0%	0%	100%	0%	0%	0%	0%	0%	
Child minder	751	768	130	10	28	1173	40	36	15			
	64%	65%	11%	1%	2%	100%	3%	3%	1%	0%	0%	
Child care centre	7	3	0	1	0	7	0	0	1			
	100%	43%	0%	14%	0%	100%	0%	0%	14%	0%	0%	
Local Authority	3	4	0	0	0	4	0	0	0			
	75%	100%	0%	0%	0%	100%	0%	0%	0%	0%	0%	
Early education (unspec.)	58	81	0	1	0	124	0	0	0			
	47%	65%	0%	1%	0%	100%	0%	0%	0%	0%	0%	
Misc. other	5	7	1	0	0	7	0	0	0			
	71%	100%	14%	0%	0%	100%	0%	0%	0%	0%	0%	
NR	5	6		0	0	8	0	0	0			
	63%	75%	0%	0%	0%	100%	0%	0%	0%	0%	0%	
Total	1407	1452	181	46	54	2248	57	49	48			
	63%	65%	8%	2%	2%	100%	3%	2%	2%	0%	0%	
By number of staff	1	2	3	4	5	Total	6	7	8	9	10	
<20	1220	1277	167	30	40	1975	51	43	30			
	62%	65%	8%	2%	2%	100%	3%	2%	2%	0%	0%	
21 - 50	119	100	8	11	10	165	3	0	12			
	72%	61%	5%	7%	6%	100%	2%	0%	7%	0%	0%	
50+	18	23	1	2	1	33	0	4	2			
	55%	70%	3%	6%	3%	100%	0%	12%	6%	0%	0%	
Not answered	50	52	5	3	3	75	3	2	4			
	67%	69%	7%	4%	4%	100%	4%	3%	5%	0%	0%	
Total	1407	1452	181	46	54	2248	57	49	48			
	63%	65%	8%	2%	2%	100%	3%	2%	2%	0%	0%	

2248 respondents answered the question, 10 people did not answer.

Survey Q4 – data cross tabulation

If so, please tell us about them.

Q4					Tag Code								
					B	Dairy / lactose intolerant							
					A	Dairy / (cow's) milk allergy							
					J	Special medical conditions / dietary requirements							
					H	Needs / prefers soya							
					C	Allergies (unspecified)							
					L	Dairy and soya free							
					All medical	Summation of B + A + J + C + L							
All responses	Yes	No			B	A	J	H	C	L	All medical		
	1	2	3	Total	4	5	6	7	8	9	10		
	322	1892	0	2214	108	98	29	26	19	3	257		
	15%	85%	0%	100%	4.9%	4.4%	1.3%	1.2%	0.9%	0.1%	11.6%		
By region													
	1	2	3	Total	4	5	6	7	8	9	10		
England	288	1690	0	1978	95	89	26	23	17	1	228		
	15%	85%	0%	100%	4.8%	4.5%	1.3%	1.2%	1%	0%	12%		
Scotland	23	109	0	132	8	7	3	2	1	2	21		
	17%	83%	0%	100%	6.1%	5.3%	2.3%	1.5%	1%	2%	16%		
Wales	7	79	0	86	3	2	0	0	1	0	6		
	8%	92%	0%	100%	3.5%	2.3%	0.0%	0.0%	1%	0%	7%		
Not answered	4	14	0	18	2	0	0	1	0	0	2		
	22%	78%	0%	100%	11.1%	0.0%	0.0%	5.6%	0%	0%	11%		
Total	322	1892	0	2214	108	98	29	26	19	3	257		
	15%	85%	0%	100%	5%	4%	1%	1%	1%	0%	12%		
By type of organisation													
	1	2	3	Total	4	5	6	7	8	9	10		
Preschool	85	275	0	360	31	37	5	2	6	1	80		
	24%	76%	0%	100%	8.6%	10.3%	1.4%	0.6%	2%	0%	22%		
Nursery	141	392	0	533	57	38	16	13	9	2	122		
	26%	74%	0%	100%	10.7%	7.1%	3.0%	2.4%	2%	0%	23%		
Play group	3	13	0	16	1	1	0	0	0	0	2		
	19%	81%	0%	100%	6.3%	6.3%	0.0%	0.0%	0%	0%	13%		
Child minder	68	1091	0	1159	14	13	5	9	2	0	34		
	6%	94%	0%	100%	1.2%	1.1%	0.4%	0.8%	0%	0%	3%		
Child care centre	2	6	0	7	0	0	1	0	0	0	1		
	29%	86%	0%	100%	0.0%	0.0%	14.3%	0.0%	0%	0%	14%		
Local Authority	0	2	0	3	0	0	0	1	0	0	0		
	0%	67%	0%	100%	0.0%	0.0%	0.0%	33.3%	0%	0%	0%		
Early education (unspec.)	20	103	0	123	5	7	2	1	2	0	16		
	16%	84%	0%	100%	4.1%	5.7%	1.6%	0.8%	2%	0%	13%		
Misc. other	2	4	0	6	0	2	0	0	0	0	2		
	33%	67%	0%	100%	0.0%	33.3%	0.0%	0.0%	0%	0%	33%		
NR	1	6	0	7	0	0	0	0	0	0	0		
	14%	86%	0%	100%	0.0%	0.0%	0.0%	0.0%	0%	0%	0%		
Total	322	1892	0	2214	108	98	29	26	19	3	257		
	15%	85%	0%	100%	5%	4%	1%	1%	1%	0%	12%		
By number of staff													
	1	2	3	Total	4	5	6	7	8	9	10		
<20	277	1672	0	1949	91	84	23	23	15	2	215		
	14%	86%	0%	100%	4.7%	4.3%	1.2%	1.2%	1%	0%	11%		
21 - 50	34	128	0	162	4	8	6	2	4	1	23		
	21%	79%	0%	100%	2.5%	4.9%	3.7%	1.2%	2%	1%	14%		
50+	8	23	0	31	12	5	0	1	0	0	17		
	26%	74%	0%	100%	38.7%	16.1%	0.0%	3.2%	0%	0%	55%		
Not answered	3	69	0	72	1	1	0	0	0	0	2		
	4%	96%	0%	100%	1.4%	1.4%	0.0%	0.0%	0%	0%	3%		
Total	322	1892	0	2214	108	98	29	26	19	3	257		
	15%	85%	0%	100%	5%	4%	1%	1%	1%	0%	12%		
2214 respondents answered the question, 44 people did not answer.													

Survey Q5 – data cross tabulation

Q5	Every day	Every other day	Once a week	Fortnightly	Monthly	Other	NR	
All responses								
	1	2	3	4	5	6	7	Total
	308	350	1290	3	19	264	24	2258
	14%	16%	57%	0%	1%	12%	1%	100%
By region								
	1	2	3	4	5	6	7	Total
England	244	304	1187	3	18	239	19	2014
	12%	15%	59%	0%	1%	12%	1%	100%
Scotland	45	30	41	0	1	18	1	136
	33%	22%	30%	0%	1%	13%	1%	100%
Wales	17	15	49	0	0	5	1	87
	20%	17%	56%	0%	0%	6%	1%	100%
Not answered	2	1	14	0	0	2	3	22
	9%	5%	64%	0%	0%	9%	14%	100%
Total	308	350	1291	3	19	264	24	2258
	14%	16%	57%	0%	1%	12%	1%	100%
By type of organisation								
	1	2	3	4	5	6	7	Total
Charity Preschool	85	95	79	0	4	101	5	369
	23%	26%	21%	0%	1%	27%	1%	100%
Nursery	119	88	245	2	9	77	0	540
	22%	16%	45%	0%	2%	14%	0%	100%
Play group	2	3	4	0	0	7	0	16
	13%	19%	25%	0%	0%	44%	0%	100%
Child minder	47	134	935	0	3	49	12	1180
	4%	11%	79%	0%	0%	4%	1%	100%
Child care centre	2	1	2	0	0	2	0	7
	29%	14%	29%	0%	0%	29%	0%	100%
Local Authority	2	1	0	0	0	1	0	4
	50%	25%	0%	0%	0%	25%	0%	100%
Early education (unspec.)	49	26	17	1	3	24	4	124
	40%	21%	14%	1%	2%	19%	3%	100%
Misc. other	1	2	1	0	0	3	0	7
	14%	29%	14%	0%	0%	43%	0%	100%
NR	1	0	7	0	0	0	3	11
	9%	0%	64%	0%	0%	0%	27%	100%
Total	308	350	1290	3	19	264	24	2258
	14%	16%	57%	0%	1%	12%	1%	100%
By number of staff								
	1	2	3	4	5	6	7	Total
<20	238	311	1190	1	11	215	16	1982
	12%	16%	60%	0%	1%	11%	1%	100%
21 - 50	51	22	49	2	6	33	2	165
	31%	13%	30%	1%	4%	20%	1%	100%
50+	10	5	8	0	2	7	1	33
	30%	15%	24%	0%	6%	21%	3%	100%
Not answered	9	12	43	0	0	9	5	78
	12%	15%	55%	0%	0%	12%	6%	100%
Total	308	350	1290	3	19	264	24	2258
	14%	16%	57%	0%	1%	12%	1%	100%
2234 respondents answered the question, 24 people did not answer.								

Survey Q6 – data cross tabulation

Q6		1 pint / <1 litre	2 - 4 pints / 1 - 2 litres	5 - 7 pints / 3 - 4 litres	8 - 10 pints / 5 - 6 litres	11 - 16 pints / 7 - 9 litres	17 - 19 pints / 10 litres	20 - 25 pints / 11 - 14 litres	26 - 50 pints / 15 - 28 litres	51 - 100 pints / 29 - 57 litres	100 pints +	Variable amount	
All responses		1	2	3	4	5	6	7	8	9	10	11	Total
		36	293	325	218	121	28	59	92	49	28	110	1359
		3%	22%	24%	16%	9%	2%	4%	7%	4%	2%	8%	100%
By region		1	2	3	4	5	6	7	8	9	10	11	Total
England		32	258	283	190	107	26	49	78	41	26	97	1187
		3%	22%	24%	16%	9%	2%	4%	7%	3%	2%	8%	100%
Scotland		4	25	24	15	6	0	9	5	4	1	9	102
		4%	25%	24%	15%	6%	0%	9%	5%	4%	1%	9%	100%
Wales		0	9	17	12	6	2	0	8	3	1	4	62
		0%	15%	27%	19%	10%	3%	0%	13%	5%	2%	6%	100%
Not answered		0	1	1	1	2	0	1	1	1	0	0	8
		0%	13%	13%	13%	25%	0%	13%	13%	13%	0%	0%	100%
Total		36	293	325	218	121	28	59	92	49	28	110	1359
		3%	22%	24%	16%	9%	2%	4%	7%	4%	2%	8%	100%
By type of organisation		1	2	3	4	5	6	7	8	9	10	11	Total
Charity Preschool		0	20	30	32	36	9	17	26	12	3	43	228
		0%	9%	13%	14%	16%	4%	7%	11%	5%	1%	19%	100%
Nursery		0	15	28	22	26	8	26	52	31	17	34	259
		0%	6%	11%	8%	10%	3%	10%	20%	12%	7%	13%	100%
Play group		0	1	2	1	1	0	1	1	0	0	2	9
		0%	11%	22%	11%	11%	0%	11%	11%	0%	0%	22%	100%
Child minder		36	248	251	146	49	10	7	6	0	1	12	766
		5%	32%	33%	19%	6%	1%	1%	1%	0%	0%	2%	100%
Child care centre		0	0	0	1	0	0	0	0	0	1	2	4
		0%	0%	0%	25%	0%	0%	0%	0%	0%	25%	50%	100%
Local Authority		0	0	0	0	0	0	0	0	0	0	1	1
		0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	100%
Early education (unspec.)		0	9	12	12	9	1	7	7	6	6	15	84
		0%	11%	14%	14%	11%	1%	8%	8%	7%	7%	18%	100%
Misc. other		0	0	1	2	0	0	1	0	0	0	1	5
		0%	0%	20%	40%	0%	0%	20%	0%	0%	0%	20%	100%
NR		0	0	1	2	0	0	0	0	0	0	0	3
		0%	0%	33%	67%	0%	0%	0%	0%	0%	0%	0%	100%
Total		36	293	325	218	121	28	59	92	49	28	110	1359
		3%	22%	24%	16%	9%	2%	4%	7%	4%	2%	8%	100%
By number of staff		1	2	3	4	5	6	7	8	9	10	11	Total
<20		31	268	308	212	107	26	52	68	27	15	86	1200
		3%	22%	26%	18%	9%	2%	4%	6%	2%	1%	7%	100%
21 - 50		0	1	3	4	12	2	4	20	19	11	16	92
		0%	1%	3%	4%	13%	2%	4%	22%	21%	12%	17%	100%
50+		0	3	2	0	1	0	3	3	3	2	5	22
		0%	14%	9%	0%	5%	0%	14%	14%	14%	9%	23%	100%
Not answered		5	21	12	2	1	0	0	1	0	0	3	45
		11%	47%	27%	4%	2%	0%	0%	2%	0%	0%	7%	100%
Total		36	293	325	218	121	28	59	92	49	28	110	1359
		3%	22%	24%	16%	9%	2%	4%	7%	4%	2%	8%	100%
2129 respondents answered the question, 129 people did not answer.													

Survey Q7 – data cross tabulation

Q7													
	1/3 of a pint	250ml (1/2 pint)	1 pint	1 litre	2 litres	4 litres	6 litres	Other	NR				
All responses	1	2	3	4	5	6	7	8	9	Total	Combined		
	458	163	751	333	603	114	29	476	20	2258	593		
	20%	7%	33%	15%	27%	5%	1%	21%	1%	100%	26%		
By region	1	2	3	4	5	6	7	8	9	Total	Combined		
England	426	156	666	293	531	98	25	456	17	2014	560		
	21%	8%	33%	15%	26%	5%	1%	23%	1%	100%	28%		
Scotland	17	3	39	25	38	9	2	15	1	136	13		
	13%	2%	29%	18%	28%	7%	1%	11%	1%	100%	10%		
Wales	12	2	38	12	29	5	1	4	0	87	14		
	14%	2%	44%	14%	33%	6%	1%	5%	0%	100%	16%		
Not answered	3	2	8	3	5	2	1	1	3	22	6		
	14%	9%	36%	14%	23%	9%	5%	5%	14%	100%	27%		
Total	458	163	751	333	603	114	29	476	21	2258	593		
	20%	7%	33%	15%	27%	5%	1%	21%	1%	100%	26%		
By type of organisation	1	2	3	4	5	6	7	8	9	Total	Combined		
Charity Preschool	78	9	95	47	89	27	8	51	3	369	33		
	21%	2%	26%	13%	24%	7%	2%	14%	1%	100%	9%		
Nursery	87	26	110	65	227	31	9	96	5	540	95		
	16%	5%	20%	12%	42%	6%	2%	18%	1%	100%	18%		
Play group	2	1	5	2	4	3	0	0	0	16	1		
	13%	6%	31%	13%	25%	19%	0%	0%	0%	100%	6%		
Child minder	233	120	512	207	254	41	9	309	9	1180	449		
	20%	10%	43%	18%	22%	3%	1%	26%	1%	100%	38%		
Child care centre	1	0	2	1	2	1	0	1	0	7	1		
	14%	0%	29%	14%	29%	14%	0%	14%	0%	100%	14%		
Local Authority	1	0	1	1	0	0	0	2	0	4	1		
	25%	0%	25%	25%	0%	0%	0%	50%	0%	100%	25%		
Early education (unspec.)	54	6	20	10	22	10	2	15	0	124	11		
	44%	5%	16%	8%	18%	8%	2%	12%	0%	100%	9%		
Misc. other	1	0	4	0	0	1	0	1	0	7	0		
	14%	0%	57%	0%	0%	14%	0%	14%	0%	100%	0%		
NR	1	1	2	0	5	0	1	1	3	11	2		
	9%	9%	18%	0%	45%	0%	9%	9%	27%	100%	18%		
Total	458	163	751	333	603	114	29	476	20	2258	593		
	20%	7%	33%	15%	27%	5%	1%	21%	1%	100%	26%		
By number of staff	1	2	3	4	5	6	7	8	9	Total	Combined		
<20	376	159	696	299	537	99	22	435	12	1982	559		
	19%	8%	35%	15%	27%	5%	1%	22%	1%	100%	28%		
21 - 50	61	4	24	14	40	11	4	27	0	165	19		
	37%	2%	15%	8%	24%	7%	2%	16%	0%	100%	12%		
50+	13	0	5	4	8	1	0	5	2	33	4		
	39%	0%	15%	12%	24%	3%	0%	15%	6%	100%	12%		
Not answered	8	0	26	16	18	3	3	9	6	78	11		
	10%	0%	33%	21%	23%	4%	4%	12%	8%	100%	14%		
Total	458	163	751	333	603	114	29	476	20	2258	593		
	20%	7%	33%	15%	27%	5%	1%	21%	1%	100%	26%		
2117 respondents answered the question, 141 people did not answer.													

Survey Q8 – data cross tabulation

Q8								
	Glass bottle	Plastic bottle	Plastic bag	Tetra pack (carton)	Other	NR		
All responses	1	2	3	4	5	6	Total	Combined (ie more than one type)
	112	1725	47	691	10	24	2258	346
	5%	76%	2%	31%	0%	1%	100%	15%
By region	1	2	3	4	5	6	Total	Combined (ie more than one type)
England	104	1546	43	631	9	18	2014	332
	5%	77%	2%	31%	0%	1%	100%	16%
Scotland	2	86	1	50	1	3	136	7
	1%	63%	1%	37%	1%	2%	100%	5%
Wales	6	76	3	4	0	1	87	3
	7%	87%	3%	5%	0%	1%	100%	3%
NR	0	17	0	6	0	2	22	4
	0%	77%	0%	27%	0%	9%	100%	18%
Total	112	1725	47	691	10	24	2258	346
	5%	76%	2%	31%	0%	1%	100%	15%
By type of organisation	1	2	3	4	5	6	Total	Combined (ie more than one type)
Charity Preschool	29	269	3	79	0	2	369	13
	8%	73%	1%	21%	0%	1%	100%	4%
Nursery	28	426	15	118	4	7	540	55
	5%	79%	3%	22%	1%	1%	100%	10%
Play group	1	11	0	3	0	1	16	0
	6%	69%	0%	19%	0%	6%	100%	0%
Child minder	46	936	29	427	4	11	1180	271
	4%	79%	2%	36%	0%	1%	100%	50%
Child care centre	0	6	0	1	0	0	7	0
	0%	86%	0%	14%	0%	0%	100%	0%
Local Authority	0	1	0	4	0	0	4	1
	0%	25%	0%	100%	0%	0%	100%	25%
Early education (unspec.)	6	66	0	55	2	0	124	5
	5%	53%	0%	44%	2%	0%	100%	4%
Misc. other	1	4	0	2	0	0	7	0
	14%	57%	0%	29%	0%	0%	100%	0%
NR	1	6	0	2	0	3	11	1
	9%	55%	0%	18%	0%	27%	100%	1%
Total	112	1725	47	691	10	24	2258	346
	5%	76%	2%	31%	0%	1%	100%	15%
By number of staff	1	2	3	4	5	6	Total	Combined (ie more than one type)
<20	101	1548	44	596	5	17	1982	327
	5%	78%	2%	30%	0%	1%	100%	16%
21 - 50	5	102	3	64	3	1	165	11
	3%	62%	2%	39%	2%	1%	100%	7%
50+	1	15	0	18	2	1	33	4
	3%	45%	0%	55%	6%	3%	100%	12%
NR	5	60	0	13	0	5	78	4
	6%	77%	0%	17%	0%	6%	100%	12%
Total	112	1725	47	691	10	24	2258	346
	5%	76%	2%	31%	0%	1%	100%	15%
2234 respondents answered the question, 24 people did not answer.								

Survey Q9 – data cross tabulation

Q9									
		Drink from single-serve carton	Poured - reusable bottle/feeding cup	Poured - reusable cups	Poured - disposable cups	Other	NR		
All responses									
		1	2	3	4	5	6	Total	Combined (ie more than one method)
		655	566	1662	22	152	29	2258	746
		29%	25%	74%	1%	7%	1%	100%	33%
By region									
		1	2	3	4	5	6	Total	Combined (ie more than one method)
England		616	490	1477	18	137	20	2014	671
		31%	24%	73%	1%	7%	1%	100%	33%
Scotland		28	30	99	2	6	1	136	29
		21%	22%	73%	1%	4%	1%	100%	21%
Wales		6	40	72	1	9	4	87	39
		7%	46%	83%	1%	10%	5%	100%	45%
NR		5	7	14	1	0	4	22	8
		23%	32%	64%	5%	0%	18%	100%	36%
Total		655	567	1662	22	152	29	2258	747
		29%	25%	74%	1%	7%	1%	100%	33%
By type of organisation									
		1	2	3	4	5	6	Total	Combined (ie more than one method)
Charity Preschool		71	20	272	3	40	2	369	33
		19%	5%	74%	1%	11%	1%	100%	9%
Nursery		109	151	430	9	47	8	540	194
		20%	28%	80%	2%	9%	1%	100%	36%
Play group		1	0	14	0	2	0	16	1
		6%	0%	88%	0%	0%	0%	100%	0%
Child minder		411	381	861	8	57	15	1180	499
		35%	32%	73%	1%	11%	3%	100%	92%
Child care centre		0	1	7	0	0	0	7	1
		0%	14%	100%	0%	0%	0%	100%	0%
Local Authority		3	1	1	0	0	0	4	1
		75%	25%	25%	0%	0%	0%	100%	25%
Early education (unspec.)		56	9	67	2	6	0	124	14
		45%	7%	54%	2%	5%	0%	100%	11%
Misc. other		2	3	4	0	0	0	7	2
		29%	43%	57%	0%	0%	0%	100%	2%
NR		2	0	6	0	0	4	11	1
		18%	0%	55%	0%	0%	3%	100%	1%
Total		655	566	1662	22	152	29	2258	746
		29%	25%	74%	1%	7%	1%	100%	33%
By number of staff									
		1	2	3	4	5	6	Total	Combined (ie more than one method)
<20		566	482	1502	18	127	23	1982	666
		29%	24%	76%	1%	6%	1%	100%	34%
21 - 50		60	46	95	2	17	2	165	50
		36%	28%	58%	1%	10%	1%	100%	30%
50+		16	5	16	0	1	0	33	5
		48%	15%	48%	0%	3%	0%	100%	15%
Not answered		13	33	49	2	7	4	78	25
		17%	42%	63%	3%	21%	12%	100%	76%
Total		655	566	1662	22	152	29	2258	746
		29%	25%	74%	1%	7%	1%	100%	33%
2229 respondents answered the question, 29 people did not answer.									

Survey Q11 – data cross tabulation

Q11												
	Monthly	Every second month	Quarterly	Twice a year	Annually	Longer	Other	Specialist supplier manages	NR			
All responses	1	2	3	4	5	6	7	8	9	Total		
	1184	41	201	48	48	7	163	475	91	2258		
	52%	2%	9%	2%	2%	0%	7%	21%	4%	100%		
By region	1	2	3	4	5	6	7	8	9	Total		
England	1097	34	173	39	44	5	113	429	80	2014		
	54%	2%	9%	2%	2%	0%	6%	21%	4%	100%		
Scotland	30	5	19	5	4	2	37	30	4	136		
	22%	4%	14%	4%	3%	1%	27%	22%	3%	100%		
Wales	47	2	8	3	0	0	11	11	5	87		
	54%	2%	9%	3%	0%	0%	13%	13%	6%	100%		
Not answered	11	0	1	1	0	0	2	5	2	22		
	50%	0%	5%	5%	0%	0%	9%	23%	9%	100%		
Total	1185	41	201	48	48	7	163	475	91	2258		
	52%	2%	9%	2%	2%	0%	7%	21%	4%	100%		
By type of organisation	1	2	3	4	5	6	7	8	9	Total		
Charity Preschool	88	8	57	14	13	2	41	133	13	369		
	24%	2%	15%	4%	4%	1%	11%	36%	4%	100%		
Nursery	270	11	65	12	12	1	43	108	18	540		
	50%	2%	12%	2%	2%	0%	8%	20%	3%	100%		
Play group	4	1	3	0	0	0	2	5	1	16		
	25%	6%	19%	0%	0%	0%	13%	31%	6%	100%		
Child minder	785	20	55	17	18	2	49	186	48	1180		
	67%	2%	5%	1%	2%	0%	4%	16%	4%	100%		
Child care centre	2	0	2	0	0	0	1	2	0	7		
	29%	0%	29%	0%	0%	0%	14%	29%	0%	100%		
Local Authority	2	0	2	0	0	0	0	0	0	4		
	50%	0%	50%	0%	0%	0%	0%	0%	0%	100%		
Early education (unspec.)	28	1	16	3	4	1	25	37	9	124		
	23%	1%	13%	2%	3%	1%	20%	30%	7%	100%		
Misc. other	0	0	1	0	1	1	1	3	0	7		
	0%	0%	14%	0%	14%	14%	14%	43%	0%	100%		
NR	5	0	0	2	0	0	1	1	2	11		
	45%	0%	0%	18%	0%	0%	9%	9%	18%	100%		
Total	1184	41	201	48	48	7	163	475	91	2258		
	52%	2%	9%	2%	2%	0%	7%	21%	4%	100%		
By number of staff	1	2	3	4	5	6	7	8	9	Total		
<20	1100	39	159	38	42	7	124	402	71	1982		
	55%	2%	8%	2%	2%	0%	6%	20%	4%	100%		
21 - 50	62	1	27	8	3	0	22	35	7	165		
	38%	1%	16%	5%	2%	0%	13%	21%	4%	100%		
50+	7	0	5	0	1	0	9	10	1	33		
	21%	0%	15%	0%	3%	0%	27%	30%	3%	100%		
Not answered	15	1	10	2	2	0	8	28	12	78		
	19%	1%	13%	3%	3%	0%	10%	36%	15%	100%		
Total	1184	41	201	48	48	7	163	475	91	2258		
	52%	2%	9%	2%	2%	0%	7%	21%	4%	100%		
2167 respondents answered the question, 91 people did not answer.												

Survey Q12 – data cross tabulation

Question 12		A = Tag code for admin free									
All responses	Convenience	Service	Quality	Price	Loyalty	Packaging type	Admin free				
	1	2	3	4	5	6	7	8	9	Total	Combined
	1913 86%	1222 55%	929 42%	631 28%	446 20%	431 19%		153 7%		2221 100%	
							0%		0%		0%
By region	1	2	3	4	5	6	7	8	9	Total	Combined
England	1729 87%	1094 55%	824 41%	528 27%	401 20%	398 20%		151 8%		1986 100%	
Scotland	93 70%	63 48%	58 44%	56 42%	26 20%	21 16%	0%	0 1%	0%	132 100%	0%
Wales	75 89%	55 65%	37 44%	41 49%	18 21%	9 11%	0%	1 1%	0%	84 100%	0%
Not answered	16 84%	10 53%	10 53%	6 32%	1 5%	3 16%	0%	1 5%	0%	19 100%	0%
Total	1913 86%	1222 55%	929 42%	631 28%	446 20%	431 19%	0 0%	153 7%	0 0%	2221 100%	0%
By type of organisation	1	2	3	4	5	6	7	8	9	Total	Combined
Preschool	320 88%	222 61%	132 36%	128 35%	87 24%	80 22%	0%	12 3%	0%	365 100%	0%
Nursery	419 79%	273 52%	238 45%	186 35%	93 18%	78 15%	0%	36 7%	0%	528 100%	0%
Play group	13 87%	12 80%	4 27%	6 40%	5 33%	1 7%	0%	0 0%	0%	15 100%	0%
Child minder	1051 90%	622 53%	500 43%	256 22%	243 21%	242 21%	0%	103 9%	0%	1169 100%	0%
Child care centre	7 100%	6 86%	0 0%	6 86%	0 0%	0 0%	0%	0 0%	0%	7 100%	0%
Local Authority	2 67%	0 0%	1 33%	1 33%	0 0%	0 0%	0%	0 0%	0%	3 100%	0%
Early education (unspec.)	87 73%	77 64%	47 39%	45 38%	17 14%	26 22%	0%	1 1%	0%	120 100%	0%
Misc. other	6 100%	5 83%	3 50%	2 33%	0 0%	2 33%	0%	0 0%	0%	6 100%	0%
NR	8 100%	5 63%	4 50%	1 13%	1 13%	2 25%	0%	1 13%	0%	8 100%	0%
Total	1913 86%	1222 55%	929 42%	631 28%	446 20%	431 19%	0 0%	153 7%	0 0%	2221 100%	0%
By number of staff	1	2	3	4	5	6	7	8	9	Total	Combined
<20	1724 88%	1074 55%	822 42%	528 27%	399 20%	390 20%	0%	145 7%	0%	1961 100%	0%
21 - 50	104 66%	87 55%	59 37%	67 42%	25 16%	23 15%	0%	7 4%	0%	158 100%	0%
50+	21 70%	15 50%	12 40%	11 37%	4 13%	8 27%	0%	0 0%	0%	30 100%	0%
Not answered	64 89%	46 64%	36 50%	25 35%	18 25%	10 14%	0%	1 1%	0%	72 100%	0%
Total	1913 86%	1222 55%	929 42%	631 28%	446 20%	431 19%	0 0%	153 7%	0 0%	2221 100%	0%
2221 respondents answered the question, 37 people did not answer.											

Survey Q14 – data cross tabulation

Question 14	Tag codes												
	1. G. scheme	A,B,C,D,M,W	Good, successful scheme that works well										
	2. Children	G,H,I,V	Very beneficial to children										
	3. Service	E1,E2,F,J,K	Good, reliable service										
	4. Admin	LN	Administration by 3rd party agents is beneficial to settings										
	5. Negatives	P1-P9, Q,R	All negative comments										
Note - numbers may not correspond to those in main report, as this cross-analysis is for groups of comments, some of which are multi-comments by respondents.													
All responses	G. scheme	Children	Service	Admin	Negatives								
	1	2	3	4	5	6	7	8	9	Total	Combined		
	370	189	171	71	95					704			
	53%	27%	24%	10%	13%	0%	0%	0%	0%	100%	0%		
By region	1	2	3	4	5	6	7	8	9	Total	Combined		
	333	175	158	65	83					641			
	52%	27%	25%	10%	13%	0%	0%	0%	0%	100%	0%		
	11	4	5	2	9					29			
	38%	14%	17%	7%	31%	0%	0%	0%	0%	100%	0%		
	24	9	7	3	3					31			
	77%	29%	23%	10%	10%	0%	0%	0%	0%	100%	0%		
	2	1	1	1	0					3			
	67%	33%	33%	33%	0%	0%	0%	0%	0%	100%	0%		
	370	189	171	71	95	0	0	0	0	704			
	53%	27%	24%	10%	13%	0%	0%	0%	0%	100%	0%		
	By type of organisation	1	2	3	4	5	6	7	8	9	Total	Combined	
		53	34	25	22	18					111		
48%		31%	23%	20%	16%	0%	0%	0%	0%	100%			
57		47	20	14	25					127			
45%		37%	16%	11%	20%	0%	0%	0%	0%	100%	0%		
5		2	1	0	1					8			
63%		25%	13%	0%	13%	0%	0%	0%	0%	100%	0%		
243		92	117	32	43					421			
58%		22%	28%	8%	10%	0%	0%	0%	0%	100%	0%		
1		0	0	0	0					1			
100%		0%	0%	0%	0%	0%	0%	0%	0%	100%	0%		
0		0	0	0	2					2			
0%		0%	0%	0%	100%	0%	0%	0%	0%	100%	0%		
11	13	8	3	6					32				
34%	41%	25%	9%	19%	0%	0%	0%	0%	100%	0%			
0	1	0	0	0					2				
0%	50%	0%	0%	0%	0%	0%	0%	0%	100%	0%			
0	0	0	0	0					0				
	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
Total	370	189	171	71	95	0	0	0	0	704			
	53%	27%	24%	10%	13%	0%	0%	0%	0%	100%	0%		
By number of staff	1	2	3	4	5	6	7	8	9	Total	Combined		
	339	167	158	65	76					634			
	53%	26%	25%	10%	12%	0%	0%	0%	0%	100%	0%		
	14	10	8	5	9					36			
	39%	28%	22%	14%	25%	0%	0%	0%	0%	100%	0%		
	3	3	0	1	5					11			
	27%	27%	0%	9%	45%	0%	0%	0%	0%	100%	0%		
	14	9	5	0	5					23			
	61%	39%	22%	0%	22%	0%	0%	0%	0%	100%	0%		
	370	189	171	71	95	0	0	0	0	704			
	53%	27%	24%	10%	13%	0%	0%	0%	0%	100%	0%		

APPENDIX 4 –CONSULTATION QUESTIONS CROSS TABS

Consultation Q1.1 – data cross tabulation

Q1.1a If yes, please say why. Q1.1b If no, what do you think would be a reasonable price for the taxpayer to pay for a pint of milk?

Question 1.1	TAG CODES												
Yes	A + B	Guarantees children a healthy / nutritious drink											
Yes	F	Pays for the setting's or a 3 rd party's admin costs											
Yes	C	Provides a fair price for farmers											
Yes	E	Provides us with a good delivered milk service											
Yes	B	Guarantees a healthy drink to children from disadvantaged families											
All responses	Yes	Yes - A + B	Yes - F	Yes - C	Yes - E	Total	No	No - <50p	No - 50-59	No 60-69	No - 70p+		
	1	2	3	4	5		6	7	8	9	10		
	800	448	88	88	81	3280	2480	466	689	518	303		
	24%	14%	3%	3%	2%	100%	76%	14%	21%	16%	9%		
By type of organisation	1	2	3	4	5	Total	6	7	8	9	10		
Pre school	158	88	28	14	21	586	428	82	124	90	47		
	27%	15%	5%	2%	4%	100%	73%	14%	21%	15%	8%		
Nursery	182	117	9	32	8	600	418	99	124	85	33		
	30%	20%	2%	5%	1%	100%	70%	17%	21%	14%	6%		
Play group	23	12	1	4	1	95	71	16	26	9	11		
	24%	13%	1%	4%	1%	100%	75%	17%	27%	9%	12%		
Child minder	104	67	3	12	3	429	325	83	103	77	24		
	24%	16%	1%	3%	1%	100%	76%	19%	24%	18%	6%		
Child care	10	8	0	1	0	27	18	6	1	6	1		
	37%	30%	0%	4%	0%	100%	67%	22%	4%	22%	4%		
Childcare setting (unspecified)	187	79	34	13	38	856	669	87	161	150	144		
	22%	9%	4%	2%	4%	100%	78%	10%	19%	18%	17%		
Local Authority	12	9	1	2	1	57	45	13	16	4	3		
	21%	16%	2%	4%	2%	100%	79%	23%	28%	7%	5%		
Health care	2	1	0	0	0	14	12	1	4	1	1		
	14%	7%	0%	0%	0%	100%	86%	7%	29%	7%	7%		
Milk supplier	5	2	1	1	1	164	159	12	22	45	7		
	3%	1%	1%	1%	1%	100%	97%	7%	13%	27%	4%		
Public	15	6	0	5	1	64	49	9	19	7	2		
	23%	9%	0%	8%	2%	100%	77%	14%	30%	11%	3%		
Other	3	3	0	0	0	15	12	1	6	1	2		
	20%	20%	0%	0%	0%	100%	80%	7%	40%	7%	13%		
Unknown	99	56	11	4	7	373	274	57	83	43	28		
	27%	15%	3%	1%	2%	100%	73%	15%	22%	12%	8%		
Total	800	448	88	88	81	3280	2480	466	689	518	303		
	24%	14%	3%	3%	2%	100%	76%	14%	21%	16%	9%		
3280 respondents, 70 did not answer													

Consultation Q2.2 – data cross tabulation

[illegible]

Consultation Q2.3 – data cross tabulation

Question 2.3	Tag codes			Mentions in report							
	4	Childcare settings - all risks	YA1, YB2, YC, YF1, YF2, YG, YI, YK, YM, YN,		485						
	5	Children under 5/ families	YB1, YD, YI, YO		378						
	6	Small / local businesses	YH, YJ, YK		57						
	7	Settings -rural / isolated area	YA1		254						
All responses	Yes	No		Settings	Children <5	Small business	Remote settings				
	1	2	3	Total	4	5	6	7	8	9	10
	1016	587		1698	485	372	50	252			
	60%	35%	0%	100%	29%	22%	3%	15%	0%	0%	0%
By type of organisation	1	2	3	Total	4	5	6	7	8	9	10
Pre school	193	98		313	103	78	13	55			
	62%	31%	0%	100%	33%	25%	4%	18%	0%	0%	0%
Nursery	205	142		365	101	88	12	46			
	56%	39%	0%	100%	28%	24%	3%	13%	0%	0%	0%
Play group	25	26		54	12	9	3	8			
	46%	48%	0%	100%	22%	17%	6%	15%	0%	0%	0%
Child minder	98	91		201	40	41	3	16			
	49%	45%	0%	100%	20%	20%	1%	8%	0%	0%	0%
Child care	8	3		12	5	4	0	1			
	67%	25%	0%	100%	42%	33%	0%	8%	0%	0%	0%
Childcare setting (unspecified)	213	123		366	113	81	9	64			
	58%	34%	0%	100%	31%	22%	2%	17%	0%	0%	0%
Local Authority	21	21		44	11	11	0	4			
	48%	48%	0%	100%	25%	25%	0%	9%	0%	0%	0%
Health care	9	3		12	5	4	0	5			
	75%	25%	0%	100%	42%	33%	0%	42%	0%	0%	0%
Milk supplier	112	5		117	27	4	1	22			
	96%	4%	0%	100%	23%	3%	1%	19%	0%	0%	0%
Public	17	17		34	13	5	1	7			
	50%	50%	0%	100%	38%	15%	3%	21%	0%	0%	0%
Other	8	0		8	4	3	1	1			
	100%	0%	0%	100%	50%	38%	13%	13%	0%	0%	0%
Unknown	107	58		172	51	43	7	23			
	62%	34%	0%	100%	30%	25%	4%	13%	0%	0%	0%
Total	1016	587	0	1698	485	371	50	252	0	0	0
	60%	35%	0%	100%	29%	22%	3%	15%	0%	0%	0%
1,698 respondents answered Q2.3, 1652 respondents did not answer											
Note - the difference between number of mentions in the report and the above cross tab is due to settings mentioning more than one outcome											

Consultation Q3.1 – data cross tabulation

Question 3.1										
All responses	yes	No					CC Setting	Small business	Disadv. Child	
	1	2	3	4	5	Total	6	7	8	9
	1329	555				2015	955	161	61	
	66%	28%	0%	0%	0%	100%	47%	8%	3%	0%
By type of organisation										
	1	2	3	4	5	Total	6	7	8	9
Pre school	239	112				382	181	13	13	
	63%	29%	0%	0%	0%	100%	47%	3%	3%	0%
Nursery	238	138				407	182	17	9	
	58%	34%	0%	0%	0%	100%	45%	4%	2%	0%
Play group	44	18				67	36	3	0	
	66%	27%	0%	0%	0%	100%	54%	4%	0%	0%
Child minder	131	90				239	100	3	9	
	55%	38%	0%	0%	0%	100%	42%	1%	4%	0%
Child care	9	5				15	6	0	1	
	60%	33%	0%	0%	0%	100%	40%	0%	7%	0%
Childcare setting (unspecified)	342	97				469	262	31	15	
	73%	21%	0%	0%	0%	100%	56%	7%	3%	0%
Local Authority	29	17				46	25	0	2	
	63%	37%	0%	0%	0%	100%	54%	0%	4%	0%
Health care	9	2				11	6	1	2	
	82%	18%	0%	0%	0%	100%	55%	9%	18%	0%
Milk supplier	112	2				115	37	80	0	
	97%	2%	0%	0%	0%	100%	32%	70%	0%	0%
Public	31	13				45	22	2	0	
	69%	29%	0%	0%	0%	100%	49%	4%	0%	0%
Other	8	2				10	2	0	1	
	80%	20%	0%	0%	0%	100%	20%	0%	10%	0%
Unknown	137	59				209	96	11	9	
	66%	28%	0%	0%	0%	100%	46%	5%	4%	0%
Total	1329	555	0	0	0	2015	955	161	61	0
	66%	28%	0%	0%	0%	100%	47%	8%	3%	0%
2,015 respondents answered Q3.1, 1,335 respondents did not answer										
Note - the difference between number of mentions in the report and the above cross tab is due to settings mentioning more than one outcome										

Consultation Q3.2 – data cross tabulation

Question 3.2	Tag Codes											
	1	N/A	Child care settings keeps money to buy more milk									
	2	N/A	Return the money to the Nursery Milk Scheme									
	3	C, D, I, L	Other - setting keeps money for financial purposes									
	4	A, B, H	Other - setting keeps money to buy other (non-milk) items									
All responses	Keep	Return	Other	Other								
	1	2	3	4	5	6	7	8	9	Total	Combined	
	1676	1177	135	81						3112		
	54%	38%	4%	3%	0%	0%	0%	0%	0%	100%		0%
By type of organisation	1	2	3	4	5	6	7	8	9	Total	Combined	
Pre school	293	208	32	21						571		
	51%	36%	6%	4%	0%	0%	0%	0%	0%	100%		0%
Nursery	345	185	28	21						592		
	58%	31%	5%	4%	0%	0%	0%	0%	0%	100%		0%
Play group	41	42	7	2						91		
	45%	46%	8%	2%	0%	0%	0%	0%	0%	100%		0%
Child minder	256	137	18	6						419		
	61%	33%	4%	1%	0%	0%	0%	0%	0%	100%		0%
Child care	16	7	2	1						27		
	59%	26%	7%	4%	0%	0%	0%	0%	0%	100%		0%
Childcare setting (unspecified)	434	356	29	19						845		
	51%	42%	3%	2%	0%	0%	0%	0%	0%	100%		0%
Local Authority	27	24	1	0						54		
	50%	44%	2%	0%	0%	0%	0%	0%	0%	100%		0%
Health care	9	2	0	2						13		
	69%	15%	0%	15%	0%	0%	0%	0%	0%	100%		0%
Milk supplier	37	47	0	0						85		
	44%	55%	0%	0%	0%	0%	0%	0%	0%	100%		0%
Public	37	22	3	1						63		
	59%	35%	5%	2%	0%	0%	0%	0%	0%	100%		0%
Other	6	2	1	0						10		
	60%	20%	10%	0%	0%	0%	0%	0%	0%	100%		0%
Unknown	175	145	14	8						342		
	51%	42%	4%	2%	0%	0%	0%	0%	0%	100%		0%
Total	1676	1177	135	81	0	0	0	0	0	3112		0%
	54%	38%	4%	3%	0%	0%	0%	0%	0%	100%		0%
	3112 respondents answered Q3.2, 238 respondents did not answer											
	Note - the difference between number of mentions in the report and the above cross tab is due to settings mentioning more than one outcome											

Consultation Q3.3 – data cross tabulation

Question 3.3	Tag Codes
1	N/A LA keeps money to use
2	N/A Return the money to the Nursery Milk Scheme
3	C, D, J, P LA keeps money to use
4	A, B, K Other - setting keeps money to use

All responses	LA keep	Return	LA keep use	Setting use							Total	Combined
	1	2	3	4	5	6	7	8	9			
	1320	1508	103	78							3071	
	43%	49%	3%	3%	0%	0%	0%	0%	0%		100%	0%

By type of organisation	1	2	3	4	5	6	7	8	9	Total	Combined
Pre school	220	288	18	18						561	
	39%	51%	3%	20%	0%	0%	0%	0%	0%	100%	0%
Nursery	266	256	23	20						588	
	45%	44%	4%	3%	0%	0%	0%	0%	0%	100%	0%
Play group	33	48	4	3						88	
	38%	55%	3%	3%	0%	0%	0%	0%	0%	100%	0%
Child minder	200	205	10	4						420	
	48%	49%	2%	1%	0%	0%	0%	0%	0%	100%	0%
Child care	15	7	1	1						26	
	58%	27%	4%	4%	0%	0%	0%	0%	0%	100%	0%
Childcare setting (unspecified)	334	435	27	20						830	
	40%	52%	3%	2%	0%	0%	0%	0%	0%	100%	0%
Local Authority	26	24	3	1						54	
	48%	44%	6%	2%	0%	0%	0%	0%	0%	100%	0%
Health care	8	4	0	1						14	
	57%	29%	0%	7%	0%	0%	0%	0%	0%	100%	0%
Milk supplier	27	51	1	0						79	
	34%	65%	1%	0%	0%	0%	0%	0%	0%	100%	0%
Public	31	28	2	1						63	
	49%	44%	3%	2%	0%	0%	0%	0%	0%	100%	0%
Other	4	6	0	0						12	
	33%	50%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Unknown	156	156	14	9						336	
	46%	46%	4%	3%	0%	0%	0%	0%	0%	100%	0%
Total	1320	1508	103	78	0	0	0	0	0	3071	
	43%	49%	3%	3%	0%	0%	0%	0%	0%	100%	0%

3071 respondents answered Q3.3, 279 respondents did not answer

Note - the difference between number of mentions in the report and the above cross tab is due to settings mentioning more than one outcome

Consultation Q3.4 – data cross tabulation

Question 3.5											
All responses	yes	no	not answered								
	1	2	3	4	5	6	7	8	9	Total	Combined
	1479	1062	83							2624	
	56%	40%	3%	0%	0%	0%	0%	0%	0%	100%	0%
By type of organisation											
	1	2	3	4	5	6	7	8	9	Total	Combined
Pre school	328	227	37							592	
	55%	38%	6%	0%	0%	0%	0%	0%	0%	100%	0%
Nursery	362	220	25							607	
	60%	36%	4%	0%	0%	0%	0%	0%	0%	100%	0%
Play group	49	43	9							101	
	49%	43%	9%	0%	0%	0%	0%	0%	0%	100%	0%
Child minder	294	128	9							431	
	68%	30%	2%	0%	0%	0%	0%	0%	0%	100%	0%
Child care	17	8	2							27	
	63%	30%	7%	0%	0%	0%	0%	0%	0%	100%	0%
Childcare setting (unspecified)	429	436	1							866	
	50%	50%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Local Authority											
Health care											
Milk supplier											
Public											
Other											
Unknown											
Total	1479	1062	83	0	0	0	0	0	0	2624	
	56%	40%	3%	0%	0%	0%	0%	0%	0%	100%	0%
2541 respondents answered Q4.3, 83 respondents did not answer											
Note - only child care providers were asked his question											

Consultation Q3.5 – data cross tabulation

Question 3.5											
All responses	yes	no									
	1	2	3	4	5	6	7	8	9	Total	Combined
	846	743								1589	
	53%	47%	0%	0%	0%	0%	0%	0%	0%	100%	0%
By type of organisation											
	1	2	3	4	5	6	7	8	9	Total	Combined
Pre school	115	156								271	
	42%	58%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Nursery	154	148								302	
	51%	49%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Play group	23	27								50	
	46%	54%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Child minder	99	137								236	
	42%	58%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Child care	3	8								11	
	27%	73%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Childcare setting (unspecified)	214	120								334	
	64%	36%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Local Authority	9	14								23	
	39%	61%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Health care	1	0								1	
	100%	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Milk supplier	75	11								86	
	87%	13%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Public	10	7								17	
	59%	41%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Other	2	5								7	
	29%	71%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Unknown	141	110								251	
	56%	44%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Total	846	743	0	0	0	0	0	0	0	1589	
	53%	47%	0%	0%	0%	0%	0%	0%	0%	100%	0%
1589 respondents answered Q3.5, 1761 respondents did not answer											

Consultation Q4.1 – data cross tabulation

Question 4.1											
All responses	yes	No					CC Setting		Small business		
	1	2	3	4	5	Total	6	7	8	9	10
	799	899				1756	573	142			
	46%	51%	0%	0%	0%	100%	33%	8%	0%	0%	0%
By type of organisation											
	1	2	3	4	5	Total	6	7	8	9	10
Pre school	152	175				338	117	24			
	45%	52%	0%	0%	0%	100%	35%	7%	0%	0%	0%
Nursery	159	200				374	92	37			
	43%	53%	0%	0%	0%	100%	25%	10%	0%	0%	0%
Play group	30	29				61	27	3			
	49%	48%	0%	0%	0%	100%	44%	5%	0%	0%	0%
Child minder	93	118				218	70	13			
	43%	54%	0%	0%	0%	100%	32%	6%	0%	0%	0%
Child care	3	7				11	2	0			
	27%	64%	0%	0%	0%	100%	18%	0%	0%	0%	0%
Childcare setting (unspecified)	162	200				380	120	35			
	25%	53%	0%	0%	0%	100%	32%	9%	0%	0%	0%
Local Authority	24	23				47	20	2			
	51%	49%	0%	0%	0%	100%	43%	4%	0%	0%	0%
Health care	8	2				10	5	1			
	80%	20%	0%	0%	0%	100%	50%	10%	0%	0%	0%
Milk supplier	86	7				93	68	12			
	92%	8%	0%	0%	0%	100%	73%	13%	0%	0%	0%
Public	26	14				40	14	6			
	65%	35%	0%	0%	0%	100%	35%	15%	0%	0%	0%
Other	5	4				9	4	0			
	56%	44%	0%	0%	0%	100%	44%	0%	0%	0%	0%
Unknown	51	120				175	34	9			
	29%	69%	0%	0%	0%	100%	19%	5%	0%	0%	0%
Total	799	899	0	0	0	1756	573	142	0	0	0
	46%	51%	0%	0%	0%	100%	33%	8%	0%	0%	0%
1,756 respondents answered Q4.1, 1,594 respondents did not answer											
Note - the difference between number of mentions in the report and the above cross tab is due to settings mentioning more than one outcome											

Consultation Q4.3 – data cross tabulation

Q4.3				
All responses	Yes	No	NR	
	1	2	3	Total
	287	374	2689	3350
	9%	11%	80%	100%
By type of organisation				
	1	2	3	Total
Pre school	27	62	503	592
	5%	10%	85%	100%
Nursery	38	68	501	607
	6%	11%	83%	100%
Play group	3	12	86	101
	3%	12%	85%	100%
Child minder	26	72	333	431
	6%	17%	77%	100%
Child care	0	5	22	27
	0%	19%	81%	100%
Childcare setting (unspecified)	0	1	865	866
	0%	0%	100%	100%
Local Authority	3	10	61	74
	4%	14%	82%	100%
Health care	0	0	16	16
	0%	0%	100%	100%
Milk supplier	136	12	18	166
	82%	7%	11%	100%
Public	2	2	61	65
	3%	3%	94%	100%
Other	1	2	13	16
	6%	13%	81%	100%
Unknown	51	128	210	389
	13%	33%	54%	100%
Total	287	374	2689	3350
	9%	11%	80%	100%
661 respondents answered Q3.3, 2689 respondents did not answer				

Consultation Q4.3a – data cross tabulation

Q4.3a								
	Rural/remote areas	Places with small orders	Places not in local area	City centres	Areas with no milk man	Everywhere	Misc. locations	
All responses	1	2	3	4	5	6	7	Total
	159	21	6	7	6	1	6	221
	72%	10%	3%	3%	3%	0%	3%	100%
By type of organisation	1	2	3	4	5	6	7	Total
Pre school	19	2	0	1	2	0	0	33
	58%	6%	0%	3%	6%	0%	0%	100%
Nursery	29	4	1	3	0	0	0	37
	78%	11%	3%	8%	0%	0%	0%	100%
Play group	3	1	0	0	0	0	0	3
	100%	33%	0%	0%	0%	0%	0%	100%
Child minder	21	0	0	1	1	0	0	25
	84%	0%	0%	4%	4%	0%	0%	100%
Child care	0	0	0	0	0	0	0	0
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Childcare setting (unspecified)	0	0	0	0	0	0	0	5
	0%	0%	0%	0%	0%	0%	0%	100%
Local Authority	3	0	0	0	0	0	0	3
	100%	0%	0%	0%	0%	0%	0%	100%
Health care	0	0	0	0	0	0	0	0
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Milk supplier	48	10	4	1	2	1	6	72
	67%	14%	6%	1%	3%	1%	8%	100%
Public	2	0	0	1	0	0	0	2
	100%	0%	0%	50%	0%	0%	0%	100%
Other	0	0	0	0	0	0	0	0
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Unknown	34	4	1	0	1	0	0	41
	83%	10%	2%	0%	2%	0%	0%	100%
Total	159	21	6	7	6	1	6	221
	72%	10%	3%	3%	3%	0%	3%	100%

Consultation Q4.4 – data cross tabulation

Q4.4				
All responses	Yes	No	NR	
	1	2	3	Total
	244	391	2715	3350
	7%	12%	81%	100%
By type of organisation				
	1	2	3	Total
Pre school	14	71	507	592
	2%	12%	86%	100%
Nursery	35	68	504	607
	6%	11%	83%	100%
Play group	4	10	87	101
	4%	10%	86%	100%
Child minder	19	79	333	431
	4%	18%	77%	100%
Child care	0	4	23	27
	0%	15%	85%	100%
Childcare setting (unspecified)	1	4	861	866
	0%	0%	99%	100%
Local Authority	3	9	62	74
	4%	12%	84%	100%
Health care	0	0	16	16
	0%	0%	100%	100%
Milk supplier	134	18	14	166
	81%	11%	8%	100%
Public	1	1	63	65
	2%	2%	97%	100%
Other	1	2	13	16
	6%	13%	81%	100%
Unknown	32	125	232	389
	8%	32%	60%	100%
Total	244	391	2715	3350
	7%	12%	81%	100%
635 respondents answered this question. 152/166 milk suppliers answered				

Consultation Q4.4a – data cross tabulation

Q4.4a								
	Small settings	Rural	If not in existing delivery area	Delivery time issues (theft/hygiene)	Storage issues	Misc oth places	Misc comments	
All responses								
	1	2	3	4	5	6	7	Total
	152	47	2	5	8	16	23	226
	67%	21%	1%	2%	4%	7%	10%	100%
By type of organisation								
	1	2	3	4	5	6	7	Total
Pre school	6	3	0	1	1	2	3	15
	40%	20%	0%	7%	7%	13%	20%	100%
Nursery	10	10	0	3	2	6	6	34
	29%	29%	0%	9%	6%	18%	18%	100%
Play group	0	1	0	0	2	0	0	3
	0%	33%	0%	0%	67%	0%	0%	100%
Child minder	10	5	0	0	1	1	3	17
	59%	29%	0%	0%	6%	6%	18%	100%
Child care	0	0	0	0	0	0	0	0
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Childcare setting (unspecified)	2	1	0	0	0	0	3	5
	40%	20%	0%	0%	0%	0%	60%	100%
Local Authority	1	1	0	0	0	0	1	3
	33%	33%	0%	0%	0%	0%	33%	100%
Health care	0	0	0	0	0	0	0	0
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Milk supplier	109	19	2	0	0	5	1	122
	89%	16%	2%	0%	0%	4%	1%	100%
Public	1	0	0	0	0	0	0	1
	100%	0%	0%	0%	0%	0%	0%	100%
Other	0	0	0	1	0	0	0	1
	0%	0%	0%	100%	0%	0%	0%	100%
Unknown	13	7	0	0	2	2	6	25
	52%	28%	0%	0%	8%	8%	24%	100%
Total	152	47	2	5	8	16	23	226
	67%	21%	1%	2%	4%	7%	10%	100%

Consultation Q5.1 – data cross tabulation

Q5.1				
All responses	Yes	No	NR	
	1	2	3	Total
	2463	473	248	3184
	77%	15%	8%	100%
By type of organisation				
	1	2	3	Total
Pre school	478	90	24	592
	81%	15%	4%	100%
Nursery	467	118	22	607
	77%	19%	4%	100%
Play group	77	15	9	101
	76%	15%	9%	100%
Child minder	366	57	8	431
	85%	13%	2%	100%
Child care	21	6	0	27
	78%	22%	0%	100%
Childcare setting (unspecified)	724	120	22	866
	84%	14%	3%	100%
Local Authority	45	6	23	74
	61%	8%	31%	100%
Health care	2	0	14	16
	13%	0%	88%	100%
Public	30	3	32	65
	46%	5%	49%	100%
Other	10	3	3	16
	63%	19%	19%	100%
Unknown	243	55	91	389
	62%	14%	23%	100%
Total	2463	473	248	3184
	77%	15%	8%	100%
2936 respondents answered the question, 248 respondents did not.				

Consultation Q5.2 – data cross tabulation

Q5.2							
	Monthly	Quarterly	Termly	Academic Year	1 year	Other	
All responses							
Top responses	1	2	3	4	5	6	Total
	75	108	35	7	154	108	487
	15%	22%	7%	1%	32%	22%	100%
By type of organisation							
	1	2	3	4	5	6	Total
Pre school	7	18	6	2	31	32	592
	1%	3%	1%	0%	5%	5%	100%
Nursery	22	30	11	2	35	21	607
	4%	5%	2%	0%	6%	3%	100%
Play group	0	0	4	0	7	3	101
	0%	0%	4%	0%	7%	3%	100%
Child minder	8	11	1	0	28	11	431
	2%	3%	0%	0%	6%	3%	100%
Child care	0	2	0	0	1	3	27
	0%	7%	0%	0%	4%	11%	100%
Childcare setting (unspecified)	23	31	9	2	37	23	866
	3%	4%	1%	0%	4%	3%	100%
Local Authority	0	2	0	0	1	2	74
	0%	3%	0%	0%	1%	3%	100%
Health care	0	0	0	0	0	0	16
	0%	0%	0%	0%	0%	0%	100%
Public	0	0	0	0	3	0	65
	0%	0%	0%	0%	5%	0%	100%
Other	0	2	0	0	1	0	16
	0%	13%	0%	0%	6%	0%	100%
Unknown	15	12	4	1	10	13	389
	4%	3%	1%	0%	3%	3%	100%
Total	75	108	35	7	154	108	3184
	2%	3%	1%	0%	5%	3%	100%

Consultation Q6.1 – data cross tabulation

Question 6.1										
All responses	OPTION 2			OPTION 3			OPTION 4			
	Rank 1st		Total	Rank 1st		Total	Rank 1st	Total		
	1232		3130	463		2901	1584	2976		
	39%	0%	100%	16%	0%	100%	53%	0%	100%	
By type of organisation										
	Rank 1st		Total	Rank 1st		Total	Rank 1st		Total	
	Pre school	189	561	90	554	309	570			
		34%	0%	100%	16%	0%	100%	54%	0%	100%
	Nursery	209	573	82	560	304	573			
		36%	0%	100%	15%	0%	100%	53%	0%	100%
	Play group	42	95	7	88	46	90			
		44%	0%	100%	8%	0%	100%	51%	0%	100%
	Child minder	133	407	101	405	201	414			
		33%	0%	100%	25%	0%	100%	49%	0%	100%
	Child care	11	23	2	23	19	26			
		48%	0%	100%	9%	0%	100%	73%	0%	100%
	Childcare setting (unspecified)	300	831	104	788	438	797			
		36%	0%	100%	13%	0%	100%	55%	0%	100%
	Local Authority	34	63	7	48	27	53			
		54%	0%	100%	15%	0%	100%	51%	0%	100%
	Health care	6	13	4	14	5	13			
		46%	0%	100%	29%	0%	100%	38%	0%	100%
	Milk supplier	149	155	1	31	10	36			
		96%	0%	100%	3%	0%	100%	28%	0%	100%
	Public	16	60	17	60	28	61			
		27%	0%	100%	28%	0%	100%	46%	0%	100%
	Other	7	15	4	11	6	11			
		47%	0%	100%	36%	0%	100%	55%	0%	100%
Unknown	136	334	44	319	191	332				
	41%	0%	100%	14%	0%	100%	58%	0%	100%	
Total	1232	0	3130	463	0	2901	1584	0	2976	
	39%	0%	100%	16%	0%	100%	53%	0%	100%	

Consultation Q6.2 – data cross tabulation

Q6.2			
All responses			
	Yes	No	Total
	1936	608	2544
	76%	24%	100%
By type of organisation			
	Yes	No	Total
Pre school	438	118	556
	79%	21%	100%
Nursery	444	130	574
	77%	23%	100%
Play group	62	28	90
	69%	31%	100%
Child minder	202	199	401
	50%	50%	100%
Child care	23	4	27
	85%	15%	100%
Childcare setting (unspecified)	723	126	849
	85%	15%	100%
Local Authority	44	3	47
	94%	6%	100%
Total	1936	608	2544
	76%	24%	100%
2544 respondents answered the question (childcare providers and local authority)			

Consultation Q6.2a – data cross tabulation

6.2a												
All responses												
	None	1 month	2 months	3 months	4 months	5 months	6 months	6 months +	Other	NR	Total	
	572	709	134	240	15	5	148	106	282	487	2698	
	21%	26%	5%	9%	1%	0%	5%	4%	10%	18%	100%	
By type of organisation												
	None	1 month	2 month	3 month	4 month	5 month	6 month	6 months +	Other	NR	Total	
Pre school	103	151	30	63	4	2	28	26	66	119	592	
	17%	26%	5%	11%	1%	0%	5%	4%	11%	20%	100%	
Nursery	126	181	37	60	2	0	26	22	60	93	607	
	21%	30%	6%	10%	0%	0%	4%	4%	10%	15%	100%	
Play group	25	20	4	14	1	0	3	0	5	29	101	
	25%	20%	4%	14%	1%	0%	3%	0%	5%	29%	100%	
Child minder	183	103	16	8	1	1	7	0	32	80	431	
	42%	24%	4%	2%	0%	0%	2%	0%	7%	19%	100%	
Child care	4	7	3	4	0	0	2	0	4	3	27	
	15%	26%	11%	15%	0%	0%	7%	0%	15%	11%	100%	
Childcare setting (unspec.)	128	235	40	84	7	2	79	52	106	133	866	
	15%	27%	5%	10%	1%	0%	9%	6%	12%	15%	100%	
Local Authority	3	12	4	7	0	0	3	6	9	30	74	
	4%	16%	5%	9%	0%	0%	4%	8%	12%	41%	100%	
Total	572	709	134	240	15	5	148	106	282	487	2698	
	21%	26%	5%	9%	1%	0%	5%	4%	10%	18%	100%	
2211 respondents answered the question (childcare providers and local authorities only)												