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# Overview of key themes in the 2022-2027 Childcare Sufficiency Assessments

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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# Overview of key themes in the 2022-2027 Childcare Sufficiency Assessments

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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## Glossary

Acronym/Key word	Definition
ALN	Additional Learning Needs
CIW	Care Inspectorate Wales is the independent regulator of social care and childcare in Wales. They register, inspect and take action to improve the quality and safety of services for the well-being of the people of Wales.
Childcare Offer	Up to 30 hours a week of government-funded early education and childcare for eligible parents/carers of three- and four-year-olds, for up to 48 weeks of the year.
CWLWM	Childcare Wales Learning & Working Mutually: A consortium of five childcare and play partners, delivering a bilingual integrated service that will ensure the best possible outcomes for children and families across Wales.
Family Information Service (FIS)	Each local authority has a Family Information Service who can advise on: Childcare; help with children and families; and support on family related issues.
Flying Start	Welsh Government programme providing support in some of Wales' most disadvantaged communities for children (under 4 years) and their families. Part of the Flying Start provision currently includes 12.5 hours of funded childcare per week, for 39 weeks, to support the development of the two- to three-year-olds eligible for support. This programme is currently undergoing expansion throughout Wales.
NDNA	National Day Nurseries Association.
National Minimum Standards (NMS)	The National Minimum Standards outline the requirements for regulated childcare for children up to the age of 12 years old. They support providers in meeting the regulatory requirements associated with their provision.
SASS	Self-Assessment of Service Statement: All registered childminders, childcare and play providers are legally required to complete a SASS in relation to monitoring and compliance of service under the Child Minding and Day Care (Wales) Regulations 2010. The SASS is completed online.
WESP	Welsh in Education Strategic Plan

# 1. Introduction

- 1.1 Childcare Sufficiency Assessments (CSA) are part of a duty on local authorities to assess whether there are sufficient childcare opportunities in the area. In September 2022, local authorities submitted their latest CSAs to the Welsh Government. This report offers an overview of the themes and issues observed across all 22 CSAs.

## **Background**

- 1.2 Under the Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016 (the Regulations) local authorities are required to assess the demand for and availability of childcare in their area every five years.<sup>1</sup> This is known as the Childcare Sufficiency Assessment (CSA) and was passed under section 26 of The Childcare Act 2006. The Act clarifies the vital role which local authorities play as strategic leaders in the provision of childcare locally. It places a duty on local authorities to secure, as far as is reasonably practicable, provision of childcare that is sufficient to meet the requirements of parents/carers in their area to enable them to take up, or remain, in work; or undertake education or training which could reasonably be expected to assist them to obtain work.
- 1.3 The Act stipulates the provision of sufficient, sustainable, and flexible childcare that meets parent or carer needs, and that these services provide appropriate childcare information to those who are in primary caregiver roles. It is the local authorities' responsibility to coordinate efforts across all sectors, Jobcentre Plus, community focused schools, integrated centres and local health services to ensure sustainable services are being provided for families' childcare needs.
- 1.4 The aim of the CSAs is to assess the current availability of childcare options, to identify gaps and to identify areas that need developing to ensure sufficient childcare opportunities. CSAs help local authorities meet their statutory responsibilities by assessing the supply (childcare provision) and demand for

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<sup>1</sup> [The Childcare Act 2006 \(Local Authority Assessment\) \(Wales\) Regulations 2016 \(legislation.gov.uk\)](https://www.legislation.gov.uk)

childcare provision (future needs of parents/carers) in their local area so that gaps in provision can be addressed.

- 1.5 In fulfilling their duty to secure sufficient childcare, local authorities must have regard to the Welsh Government's Childcare Statutory Guidance (2016) (hereafter referred to as the statutory guidance) which sets out the legislative framework underpinning the duty on local authorities, and the requirement to secure, and assess for, sufficient childcare in their area.<sup>2</sup> In light of the Covid-19 pandemic, the Welsh Government issued supplementary guidance to local authorities in respect of the CSAs for 2022. This supplementary guidance included some additional requirements for the CSAs in 2022 covering the topics COVID-19, Welsh in Education Strategic Plans (WESPs), data capturing and reporting and Nanny Scheme.<sup>3</sup>

### **Aims and objectives of the research**

- 1.6 The aims and objectives of the research were as follows:
1. To review the 2022 CSAs as completed by all 22 local authorities and the data that informed them.
  2. To provide feedback to Welsh Government on how each individual local authority has met its statutory duties in respect of the 2022 CSA process, including specific reference to the issues identified in the 2022 supplementary guidance.
  3. To provide a summary of the main themes, gaps and barriers emerging from the 22 CSA reports for 2022, drawing out any Wales-wide and regional themes and any localised issues.
- 1.7 Objectives 1 and 2 have been achieved and feedback has been provided to Local Authorities. This report presents the findings from objective 3 above.

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<sup>2</sup> [Childcare: statutory guidance for local authorities \(gov.wales\)](https://gov.wales/childcare-statutory-guidance)

<sup>3</sup> [Childcare sufficiency assessment 2022: supplementary guidance for local authorities | GOV.WALES](https://gov.wales/childcare-sufficiency-assessment-2022-supplementary-guidance)

## **Methodology**

- 1.8 The first part of this research involved reviewing each local authority's 2022 CSA to identify how each had met their statutory duties. This task also allowed an opportunity to identify any key gaps and themes across the 22 local authorities.
- 1.9 All 22 local authorities' CSAs were reviewed to identify some of the common themes presented in those documents and so providing an indication of the common issues across Wales in relation to demand and supply of childcare.
- 1.10 The statutory guidance sets out those areas that local authorities must consider in their CSAs. Initially, the headings in the statutory guidance were used to form the framework for the analysis – e.g., workforce development, barriers to accessing childcare, Additional Learning Needs (ALN), Welsh language provision and sustainability. CSAs were reviewed and coded based on these already defined topics. Where relevant, codes were grouped together and recorded as themes. Whilst this approach aimed to identify some of the most common themes across CSAs, it was not intended to be fully comprehensive.
- 1.11 During the review of CSAs, the research team also considered whether there were any identifiable geographical patterns amongst emerging themes. However, the majority of the themes identified in this review remained consistent across the CSAs of most local authorities and no obvious geographic trends emerged.
- 1.12 This report provides a summary of the main themes identified from the review of all 22 CSAs, with reference to any geographical patterns where identified.

## **2. Childcare financial support schemes**

- 2.1 This section outlines the common themes identified across local authorities' CSAs in relation to schemes that provide financial support to families towards the cost of childcare in Wales. Over the past several years, the Welsh Government has expanded childcare financial support schemes such as Flying Start and the Childcare Offer to support families to be able to access affordable childcare. There has also been an expansion of HMRC initiatives such as Tax-free childcare or childcare vouchers. This has meant an increase in demand from parents/carers able to access these schemes, an increase which, in some instances, providers have not been able to meet.
- 2.2 The statutory guidance stipulates local authorities' assessments must take into account the number of funded childcare places for children aged two years old and part-time early years education provision available and required.<sup>4</sup>
- 2.3 Information in the CSAs on schemes that provide financial support to parents/carers towards the cost of childcare was gathered from childcare providers, parents/carers, and stakeholders, namely the CWLWM partners.
- 2.4 The following sections discuss some of the common themes across the CSAs in relation to individual childcare schemes.

### **Childcare Offer**

- 2.5 The Childcare Offer for Wales provides 30 hours a week of government-funded early education and childcare for working parents/carers of three and four-year-olds for 48 weeks of the year. To be eligible, parents/carers must earn a minimum of the equivalent of working 16 hours a week at the National Minimum Wage and less than £100,000 per year, or be enrolled on either an undergraduate, postgraduate, or further education course that is at least 10 weeks in length.
- 2.6 In terms of providers delivering the Offer, CSAs reported feedback from providers that the funding rates for the Offer were too low, making it difficult for settings to cover the costs of providing this care, particularly with the increase in the National

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<sup>4</sup> [Childcare: statutory guidance for local authorities \(gov.wales\)](https://gov.wales)



Minimum Wage.<sup>5</sup> When the Offer was first introduced in 2017, the hourly rate for providers was set at £4.50 per hour and was increased to £5 per hour in 2022.

- 2.7 Another theme identified in some CSAs was the impact of the Offer on providers' hours of operation. For example, local authorities reported that, as a result of the introduction of the Offer, some sessional day care settings had increased their opening hours and changed their registration to become full day care settings. Local authorities reported in their CSA that settings' motivation for changing their opening hours/registration was to enable them to better cater for families wishing to use the maximum amount of Childcare Offer hours to which they are entitled at their setting.
- 2.8 As part of their CSA, local authorities were required to consider the needs of those who use childcare outside their area and those from other areas who use childcare in their local authority area. To do this, the statutory guidance states local authorities should consider consulting with neighbouring authorities.<sup>6</sup> Consequently, many CSAs reported that the local authority worked closely with neighbouring authorities to deliver the Childcare Offer. Although some local authorities outlined other partnership working arrangements, such as sharing good practices regarding ALN and Childcare Offer Capital Grant applications, the local authority partnership working model of Childcare Offer delivery appeared to be a key element in enabling local authorities to address the cross-border aspect within their CSA.<sup>7</sup>

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<sup>5</sup> Evaluations of the Childcare Offer also reported similar findings: [Evaluation of the Childcare Offer for Wales | GOV.WALES](#)

<sup>6</sup> [Childcare: statutory guidance for local authorities \(gov.wales\)](#)

<sup>7</sup> The Childcare Offer delivery model, introduced in 2018, consisted of partnership working amongst local authority clusters in two categories: delivery authorities, responsible for processing parents' applications and payments to providers; and engagement authorities, responsible for promoting the Offer to eligible parents in their local authorities.

## **Flying Start**

2.9 Flying Start is the Welsh Government’s targeted Early Years programme for families with children under 4 years of age who live in some of the most disadvantaged areas of Wales. Flying Start aims to make a decisive difference to the life chances of children by mitigating the impact of poverty, which is linked to poor life outcomes in early childhood, including health outcomes. The Programme comprises four elements:

- funded part-time, high-quality childcare for 2–3-year olds;
- enhanced health visitor support;
- access to parenting support; and
- support for speech, language and communication development.

2.10 It is important to note that information gathered to inform the CSA was carried out in 2021-2022, before the expansion of the Flying Start programme.<sup>8</sup> The expansion of early years provision to all 2-year-olds began in September 2022. Phase 1 of the expansion included all four elements of Flying Start and was completed in June 2023. Phase 2 focuses on the expansion of the childcare element of Flying Start, beginning in April 2023 and is currently ongoing, with plans to invest £11.65 million in 2023/24 and a further £14.3 million in 2024/25.<sup>9</sup>

2.11 Some local authorities commented in their CSA that Flying Start was not available to enough families. This was also raised as a concern by parents/carers, some of whom described it as a “postcode lottery” as to whether families get access to this funded childcare.

“Local authorities only allow certain postcodes to receive flying start help. This could of [sic] helped me a lot but instead I had to pay when I was working and a single parent but the lady that lives on the other side of the road doesn’t work and gets free flying start! I come out of work and started college because it was too expensive and not worth it for me.” Parent/carer views expressed in a CSA

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<sup>8</sup> [Flying Start expanded in Wales | GOV.WALES](#)

<sup>9</sup> [Phased expansion of Early Years Provision | GOV.WALES](#)

- 2.12 However, it is worth noting that, since the 2022 CSAs were published, it has been reported that more children have received access to Flying Start due to the expansion, with 3,178 additional children reached by the end of March 2022 through the first phase.<sup>10</sup>
- 2.13 Expansion of the Flying Start scheme means that childcare providers will need to adapt to accommodate the extra demand for such provision. It was identified in some CSAs that this is a gap they need to fill to ensure all eligible parents/carers are able to access this support.
- 2.14 Feedback from the parent/carer surveys (n=8,620) across some local authorities also suggested that even parents/carers who are able to access Flying Start feel that it does not offer enough hours, especially to enable them to work.

### **Childcare vouchers/Tax-Free Childcare (HMRC)**

- 2.15 Tax-free Childcare helps parents/carers with the cost of childcare and for many, including new applicants, replaced the childcare voucher scheme.<sup>11</sup> Tax-Free Childcare, which launched in April 2017, gives eligible families an extra 20% towards childcare costs. Similar to the eligibility for the enhanced Childcare Offer, both parents/carers need to be working to be eligible, but there are slight variations in eligibility between the two schemes – for the Tax-free childcare a parent/carer can work fewer than 16 hours/week as long as their weekly income is more than the £120/week minimum. Parents/carers also need to earn less than £100,000 a year to access Tax-free childcare.<sup>12</sup>
- 2.16 Some CSAs highlighted issues in relation to the Tax-free childcare and childcare vouchers, some providers did not accept them. Local authorities therefore identified that work needs to be done to encourage more to sign up to this.
- 2.17 There was also a concern raised in some CSAs that some parents/carers were not aware that they were able to access Tax-free childcare and so more work needs to be done to communicate this effectively with parents/carers, as well as generally advertising all types of childcare support available. Consequently, it was highlighted that local authorities should continue to work in partnership with local employability

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<sup>10</sup> [Written Statement: Completion of Phase One Expansion of Flying Start \(13 June 2023\) | GOV.WALES](#)

<sup>11</sup> As childcare vouchers were replaced by Tax-Free Childcare, childcare vouchers are no longer available for new sign-ups.

<sup>12</sup> [Tax-Free Childcare - GOV.UK \(www.gov.uk\)](#)

programmes and professionals in order to advise on the promotion of funded childcare initiatives and programmes such as tax-free childcare.

### **Overarching themes**

- 2.18 Several common themes arose in commentary about the different childcare financial support schemes. Some CSAs identified that there can be a lack of knowledge from parents/carers in general about schemes available to them. For example, some of those who answered the parent/carer survey were not aware of being able to access Flying Start, the Childcare Offer, childcare vouchers or Tax-Free Childcare. A suggestion which frequently featured in local authorities' action plans was ensuring dissemination of information to parents/carers on existing funding available, and forthcoming new initiatives becoming available, for example the expansion of the Childcare Offer and Flying Start.
- 2.19 The expansion of childcare financial support schemes has led to increased demand of childcare for certain age groups of children. Many CSAs identified an increase in demand for childcare in two, three and four year olds in their area as a result of the Childcare Offer and Flying Start – and specifically an increase in demand for part-time care for these age groups. Some CSAs identified that there may be a supply gap as these schemes get expanded further, and that work needs to be done to ensure that provision is able to keep up to meet this demand.
- 2.20 Some CSAs noted that providers had raised concerns that funding had not increased in line with inflation, sometimes making it difficult to be able to offer the funded schemes. For example, the hourly rate paid to providers from the Childcare Offer may be lower than the hourly rate a childminder or other settings charge.
- 2.21 Another concern noted was the impact of the Childcare Offer on Flying Start provision. One CSA reported a concern that providers may be allocating more places to children eligible for the Childcare Offer, reducing capacity to accommodate Flying Start children. This CSA did not provide an explanation as to why this might have been happening. The findings of the Childcare Offer evaluation (year 4) reported similar concerns raised by stakeholders, who explained the cost per child of delivering Flying Start is higher than that of the Childcare Offer, which

might encourage some providers to favour delivering the Childcare Offer over Flying Start.<sup>13</sup>

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<sup>13</sup> [Evaluation of Year 4 of the Childcare Offer \(gov.wales\)](#)

### **3. Workforce development**

- 3.1 This section outlines some of the common themes identified across local authorities' CSAs in relation to workforce development and training. The statutory guidance stipulates that local authorities must undertake an assessment of "the existing childcare workforce qualifications and training needs across the childcare types" and that "consideration should be given to the training requirements in respect of the National Minimum Standards for Regulated Childcare (NMS) more generally."<sup>14</sup> This has two purposes: 1) to inform local authorities' workforce development and training programme, and 2) to raise the quality of childcare provision.
- 3.2 Information relating to childcare workforce development and training in the CSAs was sourced from data collected via the Self-Assessment of Service Statement (SASS), provider surveys and information gathered by local authorities' officers during visits to settings (e.g., Quality Improvement Officer, Play Sufficiency Officer, Flying Start Co-ordinator).

#### **Staff recruitment and retention**

- 3.3 A key theme identified across most CSAs was staff recruitment and retention difficulties. In their CSAs, most local authorities alluded that whilst staff recruitment and retention have been ongoing challenges for the sector, COVID-19 exacerbated these issues. Some local authorities raised particular concerns in light of the expansion of the Flying Start programme as it will mean a greater demand for childcare and therefore a need to increase supply. However, current staff recruitment and retention issues faced by the sector pose a barrier to meeting this increased demand.
- 3.4 Settings experiencing difficulties in recruiting suitable, qualified staff was attributed to a number of factors. One factor cited in some CSAs was the low numbers of students studying childcare, either due to fewer courses on offer or fewer students deciding to undertake a childcare course. This in turn leads to fewer qualified practitioners entering the sector, reducing the pool of suitably qualified candidates for childcare employers to recruit from and thus making it more difficult to fill staff vacancies.

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<sup>14</sup> [Childcare: statutory guidance for local authorities \(gov.wales\)](https://gov.wales)

“The number studying Childcare courses at college has decreased substantially. Secondary school in the area are no longer offering the course.” Childcare Provider views expressed in a CSA

3.5 Furthermore, many CSAs noted that COVID-19 restrictions meant any face-to-face activities undertaken by local authorities to promote careers in the childcare sector temporarily ceased, and this may have had a negative impact on the uptake of childcare courses.

3.6 Local authorities’ CSAs stated particular difficulties in recruiting qualified Welsh speaking staff, which could limit the expansion of Welsh-medium pre-school childcare to support Cymraeg 2050 – Welsh Government’s Welsh language strategy for achieving a million Welsh speakers by 2050 – and local authorities’ WESPs. Themes identified in CSAs relating to Welsh language provision are discussed in Section 6 of this report.

“As a Welsh language nursery, we also need fluent Welsh speakers. Therefore, the availability of Welsh speaking qualified workers is even more of an issue.” Childcare provider views expressed in a CSA

3.7 A few local authorities located in rural areas of Wales raised that recruitment of qualified staff can be challenging and suggested that the recruitment of further childminders could be a key action in addressing challenges and gaps in provision associated with rural locations.

3.8 In terms of staff retention, many local authorities outlined reasons why staff were leaving childcare settings, as reported by the settings. Reasons included low pay, level of pressure and work demands and to seek further Continuing Professional Development (CPD) opportunities. COVID-19 exacerbated staff retention issues.

“Short contracts and low hours not enticing good quality staff to the job as well as very low pay compared to other work in the area requiring less qualifications and responsibility.” Childcare provider views expressed in a CSA

“One of my staff was a Team Leader, but due to COVID-19 found this too stressful and left to go into another childcare setting but as a nursing assistant rather than a Team Leader.” Childcare provider views expressed in a CSA

“I had a staff member leave because of COVID-19 because she was very anxious. She is not working now.” Childcare provider views expressed in a CSA

“The person who left went to [work for] Track and Trace... we seconded two staff there when we had less demand, and it suited their home life better and their own childcare needs.” Childcare provider views expressed in a CSA

- 3.9 Where known, the destination for those leaving childcare settings was reported in CSAs. Destinations included schools/education sector, health and social services (e.g., NHS/nursing), retail (e.g., supermarkets) and the hospitality sector.

“Two ‘leavers’ went to work in supermarkets and one to work in an ALN school.” Childcare provider views expressed in a CSA

“Some were ‘poached’ by neighbouring nurseries, retail and by local primary schools.” Childcare provider views expressed in a CSA

### **Training delivery**

- 3.10 CSAs outlined how local authorities organise training programmes for their childcare providers. As part of these training programmes, courses were either delivered in-house or commissioned out to an external training provider. These training courses tended to include mandatory training – Paediatric First Aid, Safeguarding and Food Hygiene – as well as other recommended training – e.g., ALN, Behaviour Management, Manual Handling, Health and Safety and Risk Assessment and Fire Safety, Infection Prevention Control and Outdoor Play.
- 3.11 A key theme identified across the CSAs was the impact of COVID-19 on access to and delivery of training. In many cases, local authorities’ training programmes temporarily stopped or were reduced during the pandemic. Whilst COVID-19 restrictions continued, face-to-face training was unable to take place. Consequently, some regulated training was adapted to be delivered online.
- 3.12 Paediatric First Aid was the mandatory training most affected by COVID-19. Whilst other training delivered face-to-face pre-pandemic was modified to be delivered online due to COVID-19 restrictions, many local authorities noted in their CSA that online delivery was not practical as the sole delivery method for Paediatric First Aid training. As such, delivery of Paediatric First Aid training was the most negatively affected by COVID-19 as restrictions imposed a pause on delivery for several months. Consequently, local authorities noted an increase in First Aid courses required following the pandemic.



- 3.13 Many local authorities explained in their CSA that COVID-19 restrictions negatively impacted access to training. Insufficient IT access and lack of staff cover were some of the reasons provided as to what prevented practitioners from attending online or blended training opportunities. Furthermore, setting closures meant students were unable to undertake the competency/evidence elements of their qualification and the enforcement of 'bubbles' meant work placements were not allowed to take place.
- 3.14 CSAs stated that due to a lack of training opportunities during the pandemic, particularly the reduction in the number of CPD courses offered, many practitioners have a training need or want to upskill. The most commonly cited training needs included training related to the new Curriculum for Wales and ALN (discussed in more detail in Section 5 of this report).
- 3.15 Some local authorities' CSAs reported a higher interest from childcare provider practitioners to work towards a playwork qualification. It was noted that this was due to the change to the National Minimum Standards for regulated childcare for children up to the age of 12 years. The change was that, by 30 September 2022, settings which offer out of school and holiday provision should ensure that an appropriate proportion of staff are suitably qualified with a playwork qualification.<sup>15</sup>

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<sup>15</sup> [National Minimum Standards for regulated childcare | GOV.WALES](#). Details at [Playwork qualifications deadline | GOV.WALES](#)

## 4. Barriers to accessing childcare

- 4.1 The statutory guidance for local authorities set out the requirements they had to follow to assess whether there was sufficient childcare in their localities to meet the needs of different parents/carers, and in particular on the provision of “sufficient, sustainable and flexible childcare that is responsive to parents/carers’ needs.”<sup>16</sup> Some examples of how to assess this included the affordability of childcare, the needs of working parents/carers – including those working atypical hours, the availability of childcare schemes, provision of childcare involving the use of Welsh language, and provision for children with ALN.
- 4.2 In assessing this provision, a number of common barriers were identified across local authorities’ CSAs and this section outlines some of these common themes identified in relation to barriers to accessing childcare.
- 4.3 Before going into detail on the main barriers identified, it is useful to give an overview of commentary in the CSAs around the availability of childcare at the time in which they were written (2022). In general terms, the supply and demand for childcare, and therefore the availability of childcare, varied by local authority. Of those CSAs (around half) that drew overall conclusions about the sufficiency of childcare in their area most reported that on a wide scale, there appeared to be sufficient childcare across the local authority, while just a small number reported that there was a general insufficient supply of childcare. All CSAs however identified unmet needs and barriers faces by parents/carers in accessing the provision available, meaning that even those who concluded there was sufficient childcare in their area identified insufficiencies in certain areas – for example by different types of provision and geographical areas. In the CSAs that reported insufficient childcare across their area, some linked this to businesses closing down during or after the pandemic and / or a general decline in the number of registered childminders.<sup>17</sup>
- 4.4 Information relating to barriers to accessing childcare in the CSAs was sourced from data collected via the parent/carer survey, SASS, provider surveys, and information gathered by local authority officers during visits to settings (e.g., Quality Improvement Officer, Play Sufficiency Officer, Flying Start Co-ordinator).

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<sup>16</sup> [Childcare: statutory guidance for local authorities \(gov.wales\)](https://gov.wales)

<sup>17</sup> Research into the state of the childminding sector in Wales also reported similar findings: [Independent review of childminding | GOV.WALES](#)

## **Affordability**

4.5 A common theme across the CSAs was affordability as a barrier to accessing childcare for many families. CSAs referenced responses as part of the parent/carer survey, with many suggesting that cost was the main barrier preventing them from accessing formal childcare provision as costs were too expensive. It was reported in CSAs that many parents/carers who had expressed that they were unhappy with their childcare suggested that making it more affordable would improve their experience. This concern was also expressed by stakeholders, employers, and schools. Some local authorities expressed concerns that the cost-of-living crisis would exacerbate this issue.

4.6 Some example comments from the parent/carer surveys included:

“I would like my daughter to go into further childcare but I can't afford it.”

Parent/carer views expressed in a CSA

“I paid just under £2,000 a month for childcare as I have twins no support with childcare costs not a single penny. If my husband or I gave up work to look after them, when they started school we would be looking for jobs and wouldn't get back what jobs we had. We struggle through and the most important years of bonding with our babies was taken away by constant worry and anxieties on how we were going to afford paying the bills, working and paying childcare.”

Parent/carer views expressed in a CSA

“I know I can get money for childcare through [Universal Credit], but I still don't believe I can afford it. It won't make our life any better me having a job.”

Parent/carer views expressed in a CSA

4.7 Several CSAs specified how affordability can be even more a factor for certain types of families. It was identified that the cost of childcare could act as a barrier to some parents/carers accessing employment or training, this included parents/carers having to stop work or reduce their hours as they could not afford childcare. Some identified that costs were particularly high for children under the age of three and families ended up becoming reliant on friends and family due to this. One CSA identified that those on minimum wage did not benefit enough from funding support and struggled to afford childcare. It was noted that some single parents/carers were unable to afford childcare fees on top of living costs even after receiving Universal

Credit support. It is, however, important to note that since the CSAs were written there has been increased support to Universal Credit childcare support.<sup>18</sup> Those with two or more children felt that childcare was financially unsustainable.

- 4.8 Affordability was also identified as an issue for families from ethnic minority backgrounds and families who had children with ALN. However, discussion of issues relating to the needs of these groups was often more limited within both CSAs and Action Plans, and further engagement may be needed in future.
- 4.9 It was also noted that there was a gap in funding for younger children aged 0-2 years who were not yet eligible for Flying Start and the Childcare Offer.
- 4.10 Local authorities who had identified affordability as a barrier made suggestions on how childcare could become more affordable for families. This included the local authorities supporting providers to be able to offer all types of childcare financial support schemes, as is outlined in Section 2. For example, having more providers being able to offer Flying Start (such as childminders). Views noted in CSAs included those from parents/carers who also felt that there should be more support offered to incentivise parents/carers to return to work after having a baby. As is mentioned in Section 2, ensuring parents/carers were given information of the funded childcare schemes available was featured in action plans. It was also highlighted that local authorities should continue to work in partnership with local employability programmes and professionals in order to advise on promotion of funded childcare initiatives and programmes such as Tax-Free Childcare. These suggestions featured in many CSA action plans.

### **Flexibility**

- 4.11 All CSAs highlighted flexibility as a key issue in parents/carers being able to access childcare. It was frequently reported from the parent/carer surveys and in feedback from settings that parents/carers required more flexibility for childcare.
- 4.12 Many CSAs highlighted that working parents/carers, particularly those working atypical hours struggled to access childcare outside of standard working hours. It was noted that many providers were unable to offer childcare provision after 6pm

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<sup>18</sup> [Universal credit childcare funding to rise 47% from June - BBC News](#)

during the week, on weekends or offer overnight care. There was a call from many parents/carers to extend opening hours of settings. Parents/carers who worked different shifts each week also found it difficult to find childcare that did not require the child to access the setting the same days each week and felt that more flexibility to adapt to shift work was needed. There were also issues raised by parents/carers who struggled to access full-time care. On the other hand, there were also concerns for those wishing to access part-time care but were unable to e.g., if parents/carers only required afternoons or mornings, they may have had to pay for a full day space.

“[In my experience] there are very few flexible childcare venues. As a shift worker my rota changes regularly.” Parent/carer views expressed in a CSA

“I found it difficult to find childcare that starts early enough in the mornings and opens late enough in the evenings. This is why I have had to rely on family and friends.” Parent/carer views expressed in a CSA

“It has been hard to find childcare for children around the times and days we require. Most childcare providers require you to stick to the same days each week, but when you don’t work the same days every week it’s difficult... there isn’t the flexibility for shift workers.” Parent/carer views expressed in a CSA

4.13 Several CSAs reported that there were some plans in place from settings to increase their opening hours (including in response to increased demand as a result of funded programmes as mentioned in Section 2), however many providers did not have plans in place or were unable to accommodate this need. Typically, childminders were able to offer more flexibility and out of hours childcare than some other settings, however due to the decline in registered childminders many CSAs also highlighted this as a concern in addressing this need. It was suggested by some CSAs that addressing the decline in childminder numbers and the retention and recruitment of childminders was important in helping to deliver a service which meets the needs of parents/carers. It was also suggested that settings should work with parents/carers to meet their needs, as well as communicating to parents/carers what childcare is available in their areas outside of typical working hours.

“Some parents indicated in the Parental Survey that they were unable to find childcare to suit their flexible working patterns so continued support around encouraging providers to have open and honest conversations with families to

ascertain their needs as they could potentially evolve over time is needed to ensure that flexibility of services is being delivered where possible.” CSA commentary

### **Lack of afterschool care and holiday provision**

- 4.14 Many CSAs identified a high demand for after school care and holiday provision for those of school age. It was reported that demand for after school provision could not be met in many areas with parents/carers reporting that they struggled to access it and expressed a desire for more childcare to be available during these times. Some CSAs identified this as one of the main concerns faced by parents/carers and a particular issue faced by working parents/carers.

“Yes, there is a huge shortage of childcare in my local area. When my son starts primary school next year, I’m unable to find anyone (childminder or private day nursery) who will be able to provide [suitable] childcare. I feel really stressed out about this as may mean I have to reduce my working hours again or give up my job. I’m a post grad qualified professional so don't want to give up my career or have to drop my working hours again. I currently work on 0.75 contract due to issues with availability of childcare.” Parent/carer views expressed in a CSA

“Our school has stopped its breakfast club since the pandemic and has no after school club. This makes it difficult to work the hours my employer requires.” Parent/carer views expressed in a CSA

- 4.15 Several local authority CSAs reported the instability of the out of school sector and that some clubs had deregistered (some due to the pandemic). Some noted that headteachers were unable to justify starting before/after school clubs due to insufficient demand, but this demand depended on the cost of the club (with more expensive clubs likely to have less demand).

### **Lack of other types of provision**

- 4.16 Most CSAs reported that parents/carers struggled with the availability of Welsh medium settings in their area. A significant proportion of parents/carers expressed a desire to send their children to Welsh medium settings, however there were no

places available within their area. This is a barrier which is explored in more detail in Section 6.

- 4.17 Most CSAs identified a gap in provision in childcare for children with ALN. Many parents/carers were unable to access suitable provision within their area. This is a barrier which is explored in more detail in Section 5.

### **Geographical barriers**

- 4.18 All CSAs produced information on the supply and demand of childcare in different localities of their area. While instances of availability of different types of childcare provision was specific to the geographical area of each local authority, one common theme that emerged in some CSAs was the barrier that some parents/carers faced in rural areas. Those living in these areas could face a limited choice of childcare in their area. It was also highlighted that parents/carers could end up travelling great distances to access childcare, especially in instances where the setting was not in the same area as their workplace. This could also result in parents/carers accessing childcare in a different local authority to the one they live. One local authority stated that its rural location and having minimal public transport options created a barrier to accessing childcare.
- 4.19 In line with the statutory guidance, CSAs incorporated population projections and provided commentary and analysis on what this could mean for childcare provision in their area. On the whole, there appears to have been a decline in birth rates in recent years, which could potentially lead to reduced demand for childcare.

## 5. Additional Learning Needs (ALN)

- 5.1 This section outlines some of the common themes identified across local authorities' CSAs in relation to ALN. Of note, the statutory guidance published in 2016 required local authorities to report on supply, demand, and barriers to childcare for children with Special Educational Needs (SEN) or a disability and this terminology has since been replaced with children with ALN. Over recent years the landscape of ALN childcare in Wales has changed with the passing of the Additional Learning Needs and Education Tribunal (Wales) Bill in 2017 with the associated ALN transformation programme and an ALN Code.<sup>19</sup> Despite the statutory guidance being published prior to these changes in 2016, local authorities are required as part of the CSA process to report on the supply and demand for childcare for children with ALN as well as identifying the barriers to childcare for these families.<sup>20</sup>
- 5.2 Information on ALN in the CSAs was gathered from childcare providers, parents/carers, and stakeholders, namely the CWLWM partners. Whilst the number of parents/carers survey respondents who reported to have a child/ren with an ALN/disability was small, the feedback they provided was valuable for understanding their needs and gaps in childcare provision.
- 5.3 A key theme identified from parents/carers survey responses across the CSAs was difficulty in finding suitable provision for children with ALN to meet their specific needs. Some comments included access to suitable childcare for children with ALN being even more of a challenge for families during holiday periods and for secondary school age children. The lack of suitable childcare had led to families not accessing formal childcare and relying on support networks or giving up their employment. Examples of responses to the parent/carer survey are included below.

“You don't offer long enough hours or correct places for childcare. Disabled children like mine need all year round childcare and holiday clubs and they can only be used through private nurseries so please consider giving private

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<sup>19</sup> According to the Welsh Government “The additional learning needs (ALN) system is the new system for supporting children and young people aged 0 to 25 in Wales with ALN. The ALN system is replacing the special educational learning needs (SEN) system and the system for supporting young people with learning difficulties and/or disabilities (LDD).” [The additional learning needs transformation programme: frequently asked questions \[HTML\] | GOV.WALES](#)

<sup>20</sup> [Childcare: statutory guidance for local authorities \(gov.wales\)](#)



nurseries full time childcare offer places...” Parent/carer views expressed in a CSA

“My daughter is ‘disabled’ and there is nowhere that meets her requirements. She cannot be left on her own so I have had to give up work to be there for her.”

Parent/carer views expressed in a CSA

“I have an older child with autism and learning difficulties. [In my experience] there is very little childcare around that caters to children like my daughter. There is a desperate need for wraparound care for children in special schools. Parents of disabled children should be allowed to access work like anyone else.”

Parent/carer views expressed in a CSA

- 5.4 Stakeholders in some CSAs suggested that nannies could be used to provide ALN support to working families, as this would allow families to access childcare in their own home and still benefit from Tax-Free Childcare or employer childcare vouchers.
- 5.5 A common theme that emerged throughout the CSAs was the issue of insufficient funding for ALN provision. CWLWM partners stressed the need for sufficient funding for childcare providers to continue providing sustainable provision for children with ALN. This included ensuring that 1:1 provision is available for children who required this level of support as this was noted to be deficient. It was felt that there were difficulties in recruiting staff to supply 1:1 support and the lack of 1:1 support was also identified by parents/carers.
- 5.6 Some CSAs outlined existing schemes designed to support children with ALN such as a referral programme in one west Wales authority, but stakeholders emphasised the importance of ensuring that families are informed of their childcare options and any financial assistance available. Childcare providers should also receive guidance on financial support and grants and be kept aware of support available. Whilst some local authorities had schemes and financial support in place, the cost of childcare was also considered a barrier for families of children with ALN, especially for disadvantaged families and could lead to reduced childcare attendance.

“Finding care for a disabled child is almost impossible, or what there is [in my experience] more expensive. This means we need to rely on the flexibility of employers and family support to enable us both to work. It can be very stressful...” Parent/carer views expressed in a CSA

5.7 The need for further training for staff and how a lack of sufficient training is a barrier to offering support to children with ALN was a recurring theme throughout the CSAs. The need for further ALN training for childcare staff was also raised in the parents/carers survey.

“Many people are not trained for additional needs children, especially where violent behaviour is common.” Parent/carer views expressed in a CSA

Some challenges associated with the introduction of the new ALN code in Wales were raised. PACEY Cymru described that there are differing levels of expectations and training requirements relating to the new ALN code. The introduction of the new ALN code in Wales means childcare staff require further training in relation to the new code. CSAs which shared results from surveys with childcare providers found most providers felt that their setting had made progress with the ALN transformation programme, although some respondents did not know what the ALN transformation programme was. PACEY Cymru identified that just over half of childminders in Wales were aware of the new ALN code and desired more information on how local authorities were preparing and supporting childminders in transitioning in working towards the new code.

5.8 The need for better access to Welsh medium provision for ALN was identified by some local authorities who outlined actions that were being taken to address this including developing training provision, advertisement of Welsh medium provision and investment to ensure that bilingual childcare is available to families. Several of the CSAs reported feedback from stakeholders, Mudiad Meithrin in particular, who emphasised the importance of accessibility to Welsh medium provision for children with ALN and that provision should be within reach of the family’s home to allow families better choice.

5.9 The COVID-19 pandemic affected the supply and demand for childcare provision generally with the closure of childcare settings creating challenges for parents/carers with any child/ren with ALN. Some stakeholders and childcare providers outlined that the pandemic had impacted the development of children, particularly in early years, and examples noted were around speech and language development and anxiety. In a few CSAs, both stakeholders and childcare providers described how the pandemic had increased the number of children with ALN as the consequences of lockdown and lack of access to support services negatively

affected the early years development of many children. One stakeholder in one CSA detailed that as a result of the pandemic, children with ALN were “getting left further behind”.

## 6. Welsh language provision

6.1 This section outlines some of the common themes identified across local authorities' CSAs in relation to Welsh language provision. The 2006 Act and statutory guidance outlines that in determining the sufficiency of childcare provision, local authorities must consider "the provision of childcare involving the use of the Welsh language."<sup>21</sup> The statutory guidance states that challenges experienced by Welsh medium settings and opportunities should be taken into account, as well as consideration for demand for Welsh medium and bilingual childcare provision and the likelihood of increases in demand in the future. Furthermore, recent supplementary guidance, published in March 2021, specifies that local authorities must:

"Ensure that engagement with local authority WESP leads and key stakeholders takes place at an opportune time in the planning cycle and include objectives in their 2022 CSA which are clearly linked to the local authority's plans for growth and continuity in Welsh medium education and the 10-year target in respect of Year 1 children."<sup>22</sup>

6.2 Sources local authorities drew on for information on Welsh language childcare provision outlined in CSAs included the SASS, local authorities' WESP, Census data, annual population survey, results from survey of parents/carers and relevant data provided by Welsh Government.<sup>23</sup>

6.3 In their CSAs, local authorities outlined their commitment to supporting Cymraeg 2050 – Welsh Government's Welsh language strategy for achieving a million Welsh speakers by 2050 – through a focus on assessing the sufficiency of Welsh medium childcare provision. Local authorities also outlined how their approach to ensuring sufficient Welsh medium childcare supports and aligns with their WESP.

6.4 The Welsh in Education Strategic Plans (Wales) Regulations 2019 require local authorities to set a ten-year target increase in the number of children in Year 1 in Welsh medium education.<sup>24</sup> In their CSAs, some local authorities set out aims to

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<sup>21</sup> [Childcare: statutory guidance for local authorities \(gov.wales\)](#)

<sup>22</sup> [Childcare sufficiency assessment 2022: supplementary guidance for local authorities | GOV.WALES](#)

<sup>23</sup> The 2022 supplementary guidance document notes: "To support the planning process, the Welsh Government will provide local authorities with relevant data, including the numbers of Cylchoedd Meithrin within the local authority area and the number and percentage of children transferring from a Cylch Meithrin to Welsh medium primary education."

<sup>24</sup> [The Welsh in Education Strategic Plans \(Wales\) Regulations 2019 \(legislation.gov.uk\)](#)

support their target percentage of Year 1 children taught through the medium of Welsh. Actions included focusing efforts on developing, increasing and promoting supply of Welsh medium provision, including language immersion opportunities, to help ensure a seamless pathway towards Welsh medium education. To do so, local authorities noted the importance of encouraging more Welsh speaking individuals to join the childcare profession, particularly childminders, which, as discussed later in this section, are in short supply. Examples of local authorities planned approaches to do this included marketing campaigns and collaborating with further education colleges to promote the benefits of Welsh language in the workplace.

- 6.5 Local authorities' aims to support their target percentage of Year 1 children taught through the medium of Welsh also involved actions to support the promotion of the benefits/advantages of bilingualism. Many local authorities outlined that they would work with Family Information Services (FIS) to do this. Local authorities also stated a commitment to support settings to work towards delivering the CIW Welsh Language Active Offer.<sup>25</sup>
- 6.6 In assessing sufficiency of Welsh medium childcare, a key theme identified across the CSAs was challenges faced by parents/carers in accessing Welsh medium provision. The most commonly cited issue in relation to accessing Welsh medium childcare for parents/carers was availability of this provision. More parents/carers cited availability as an issue over and above distance, quality of care, staff language capability, cost, and insufficient hours of care.
- “There is not a lot of Welsh providers. My area didn't have a lot of options.”  
Parent/carer views expressed in a CSA
- “...More provision of bilingual or Welsh speaking day nurseries would be helpful, or increased financial support for Cylch to open longer hours during the school holidays.” Parent/carer views expressed in a CSA
- 6.7 Whilst lack of available Welsh medium childcare provision appeared to be an issue generally, across most childcare provider types, it appeared to be particularly

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<sup>25</sup> The 'Active Offer' is a key element of 'More than just words' – Welsh Government's strategic framework for promoting the Welsh language in health and social care published in 2016. The Active Offer is “when a service is provided in Welsh without someone having to ask for it. It means providers naturally anticipate the needs of Welsh speakers. They do not wait for a person to ask for a service in Welsh but incorporate and promote the belief that if you are a Welsh speaker, being able to use your own language must be seen as a core component of your care and not an optional extra. [More than just words | Care Inspectorate Wales](#)

notable for childminders. Parent/carer quotes presented in CSAs illustrate this with comments such as “I have not been able to find a Welsh speaking childminder”. This issue was also raised by Mudiad Meithrin who stated, “We need more confident Welsh-speaking childminders in the county.”

- 6.8 Another issue related to accessing Welsh medium childcare included insufficient hours of care. The largest proportion of Welsh medium childcare providers tend to offer sessional care – typically a Cylch Meithrin. The hours offered by these providers may not meet those required by parents/carers, and some local authorities outlined in their CSAs that parents/carers reported insufficient hours of care as a barrier to accessing Welsh medium provision.

“My daughter was attending Cylch Meithrin...but we had to change setting as I couldn't get to work in time with their opening hours. Therefore I had to change to an English setting as it was the only available playgroup that opened early enough. Having said that the care and the range of experiences is second to none.” Parent/carer views expressed in a CSA

- 6.9 As discussed in Section 5, some local authorities also identified the need for better access to Welsh medium provision for children with ALN.

- 6.10 Staff language skills were reported in some CSAs as a barrier to addressing issues with the supply of Welsh medium childcare provision. Comments from parents/carers, providers and stakeholders presented in CSAs provided an indication as to the issues with recruiting qualified Welsh speaking staff:

“I chose our current nursery as it's a small nursery, with a cosy, family-oriented feeling. It is a shame that not many staff speak Welsh there.” Parent/carer views expressed in a CSA

“There is a need to ensure that enough Welsh speakers consider working in Childcare so that sufficient staff are available to work in this field. Ensure that the professionals e.g., language therapists able to speak Welsh with Welsh speaking families.” Stakeholder views expressed in a CSA

“There are difficulties at present in appointing staff, especially qualified staff who can speak the Welsh language.” Stakeholder views expressed in a CSA

- 6.11 The above quotes illustrate how childcare settings face issues recruiting qualified Welsh speaking staff. Section 3 further discussed recruitment issues identified in CSAs.
- 6.12 Due to Welsh language capacity issues identified, local authorities noted in their CSAs the need to promote careers in childcare, with a focus on encouraging more Welsh speaking individuals to join the profession. Some CSAs also highlighted the need to support the sector with Welsh language training. An example of approaches outlined by local authorities was promotion of funded Welsh language taster courses designed for the childcare and early years workforce.

## 7. The future of childcare

7.1 This section outlines some of the common themes identified across local authorities' CSAs in relation to sustainability and the future of childcare provision in Wales. According to the 2006 Act, local authorities are required to ensure that sustainability and start-up grants are available as well as having a programme in place to support new childcare places. The statutory guidance outlined that consideration must be given to the sustainability of the childcare market and what factors may affect the sustainability of childcare providers.<sup>26</sup> Guidance also highlighted factors that local authorities may consider during the CSA process which included:

“...direct grants/funding for childcare providers, funding channelled to parents/carers, as users of childcare (working tax credit, universal credit, employer supported childcare, tax-free childcare) and CSSIW de-registrations.”<sup>27</sup>

### **Business sustainability**

7.2 In their CSAs, local authorities presented the number of new registrations and de-registrations across the different childcare provider types. Of note, a decrease in the number of childminders was identified across several CSAs with some sharing a higher number of de-registrations than registrations.<sup>28</sup> This was also raised as a concern across Wales by PACEY Cymru.

“PACEY Cymru are concerned to note a general decline in the number of childminders across Wales...From April 2021, PACEY Cymru have been focusing on promotion of childminding as a career choice and childcare option for families to support sustainability, childminder numbers and availability of childcare choice for parents.” Stakeholder views expressed in a CSA

7.3 A key threat to sustainability identified for childcare providers was the difficulty associated with staff recruitment and retention.

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<sup>26</sup> [Childcare: statutory guidance for local authorities \(gov.wales\)](#)

<sup>27</sup> At the time of the publication of the 2016 guidance, the regulator of social care and childcare in Wales was Care and Social Services Inspectorate Wales (CSSIW), this has now changed to Care Inspectorate Wales (CIW).

<sup>28</sup> Research into the state of the childminding sector in Wales also reported similar findings: [Independent review of childminding | GOV.WALES](#)



“It is very difficult to recruit experienced and qualified staff. There is a huge shortage of staff in early years care and education. Due to staff shortages, there is additional pressure on staff to work additional hours / days which creates additional stress on individuals. It is also not possible for staff to attend training as part of their professional development as there are no staff to replace and adhere to CIW staffing ratios.” Childcare provider views expressed in a CSA

The promotion of the childcare sector as an attractive career was considered by some local authorities to help address the challenges of staff recruitment and retention. One local authority shared that “Continuing to promote a sense of ‘value’ in the role of childcare professionals and the childminding profession” was a key response from childcare providers when asked what help or advice they would like from the local authority.

- 7.4 Section 4 of this report detailed the barriers faced by families in accessing suitable childcare which included the flexibility of provision, particularly a lack of afterschool care and holiday provision. As part of the CSA consultation process, Clybiau Plant Cymru Kids Club suggested that “more needs to be done to encourage greater flexibility in services to meet the needs of parents working atypical hours”. On the other hand, two local authorities did include concerns that while there is demand for flexible provision, it is unsustainable for childcare providers.

“Although there is a demand for more flexible childcare this can be unsustainable for providers. The need to plan and fund staffing for the number of children attending can be expensive if these places are not filled at the last minute.” CSA commentary

“The concept of affordability is often subjective which makes meeting demand for affordable childcare challenging. Sustainability of childcare businesses need to be factored in when considering affordability, as the more “affordable” you make childcare, the more financial pressure you place on the financial health of a business. The result of putting pressure upon sustainability within the childcare market can lead to failing businesses, increased financial intervention from the local authority and/or third sector partners which will inevitably end in loss of childcare places.” CSA commentary

7.5 The impact of the COVID-19 pandemic in relation to sustainability was a key theme discussed throughout several CSAs. The CSAs demonstrated the various short-term and long-term impacts highlighted by local authorities which included the financial impact from loss of revenue from childcare setting closures, decreased demand as more parents/carers were working from home or furloughed and concerns with staff recruitment and retention. The National Day Nurseries Association (NDNA) commented generally that the pandemic and “the protective measures taken by nurseries has resulted in a considerable lack of income for many nurseries and created uncertainty about the future.”

“It was really difficult, hardest thing was having to close as a business.

Furloughing staff was hard, finding new qualified staff is now hard.” Childcare provider views expressed in a CSA

7.6 Most of the local authorities shared details of the several grants made available relating to sustainability and financial support offered to childcare providers. Examples included Additional Support Grant, New Provision Grant/Business Start Up Grant, and Resource Grant. It was often recommended that childcare providers are regularly reminded or made aware of grants available to them.

“Accessing the grants was really straightforward, the money has really helped my setting especially replacing broken and worn toys.” Childcare provider views expressed in a CSA

7.7 Several grants were directed towards supporting providers through the effects of the COVID-19 pandemic, including the Coronavirus Job Retention Scheme and Childcare Offer Small Capital Covid Grants.

“It was a simple process, and we acquired lots of new resources to help us through COVID-19 and the grant gave us a much-needed boost covering the cost of long overdue works we were not in a position to fund. It really relieved the financial pressure.” Childcare provider views expressed in a CSA

7.8 In some local authorities, childcare providers were invited to outline what support they would welcome going forward. Key examples included ensuring providers were regularly updated about grants, assistance with staff recruitment and retention, staff training, support for registrations and inspections and support surrounding delivering Welsh language and ALN provision.

“Offer higher rates of pay and try to recruit more Welsh speakers.” Stakeholder views expressed in a CSA

### **The future of childcare**

- 7.9 Of note, the CSAs discussed in this report cover the five-year period of 2022-2027 whilst following the 2016 statutory guidance and there have been several developments in childcare provision for Wales since.<sup>29</sup>
- 7.10 As part of the CSA process, childcare providers were asked to state their main concerns for the future of their setting. Key issues included financial stability and challenges, responding to the number of children who could attend the setting, and staff retention.
- 7.11 Section 2 of this report detailed the expansion of Flying Start and Childcare Offer provision throughout Wales. Whilst this will be a positive step to improving accessibility to childcare and be welcomed by families, concerns were raised by local authorities surrounding an increased demand for childcare and a potential gap for some in supply, fuelled by staff recruitment and retention challenges. Further to this, one local authority detailed concerns from WESP regarding the number of local Welsh medium Flying Start childcare places for families and the required travel if accessing Welsh medium provision.
- 7.12 NDNA raised that the impact of COVID-19 and the associated protective measures that were required significantly impacted revenue for nurseries and consequently generated uncertainty for their future and availability of childcare places. One local authority however noted in their CSA that the number of Flying Start sessions attended increased from 2019/20 and 2020/21 as families’ confidence and desire for children to return to childcare grew. This may be widespread across other local authorities.
- 7.13 As mentioned in Section 4, population predictions vary by each local authority. While some local authorities predicted an increase in their 0–17-year-old population, the majority reported that there appeared to have been a drop in birth rates over the past few years, with this trend set to continue over the next several years, meaning

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<sup>29</sup> [Childcare: statutory guidance for local authorities \(gov.wales\)](https://gov.wales)

there will likely be a decrease in the population of 0–17-year-olds and potentially a decrease in demand for childcare. However, many CSAs noted that this should be offset with an increase in demand for childcare due to the expansion of childcare financial support schemes such as Flying Start and the Childcare Offer. There are also other factors which may impact population predictions such as new housing developments and migration into the area. It is therefore difficult to say with any certainty the impact population changes will have on the demand for childcare across Wales.

- 7.14 As discussed in 7.5, the COVID-19 pandemic has resulted in several short and long-term impacts on childcare provision. NDNA highlighted the issues relating to recruitment of qualified staff and business sustainability, namely financial challenges, had led to uncertainty for the future of childcare providers. PACEY Cymru further emphasised the need for financial support to be available for childminders while recovering from the impacts of the pandemic. For one local authority, their CSA raised the concern that COVID-19 had significantly impacted the progress in addressing gaps identified during the assessment process. Around half of local authorities identified changes to demand due to the pandemic including more parents/carers accessing formal childcare instead of relying on family/friends because of restrictions in place and a reduced demand for after school childcare with parents/carers working from home therefore more able to collect their child from school. Whilst restrictions were no longer in place at the time of this report, parents/carers may be working from home more regularly than before the pandemic so demand for after school childcare provision may still be affected.

## 8. Summary and synthesis

- 8.1 This final chapter summarises the key themes that have emerged from the analysis of the 22 CSAs.

### *Financial support for childcare*

- 8.2 The CSAs reported on childcare financial support schemes in Wales, including the supply and take-up of the Childcare Offer, Flying Start, and HMRC's childcare vouchers and tax-free childcare programmes. Many CSAs reported that the expansion of the Childcare Offer had resulted in a surge in demand from parents, occasionally straining the capacity of childcare providers.
- 8.3 One recurring theme across the CSAs was the financial strain placed on providers, especially concerning the Childcare Offer. Despite an increase in the hourly rate since its inception in 2017, concerns persisted among providers regarding whether this funding was sufficient to cover the costs associated with delivering high-quality childcare. Moreover, the introduction of the Childcare Offer had motivated some childcare facilities to extend their operational hours to align with the needs of families seeking to maximise their entitlement. With regards Flying Start, there were both positive remarks and criticism in the CSAs. While many acknowledged its positive impact, it was reported in CSAs that some local authorities and parents had raised concerns about its accessibility, sometimes dubbing it a "postcode lottery." However, it was noted in many CSAs that the expansion of Flying Start could address these disparities, reaching more children and increasing the demand on childcare providers.
- 8.4 Many CSAs noted the need for more effective dissemination of information to parents about available support schemes. Additionally, concerns were raised about the sustainability of these schemes for childcare providers in the future and of their potential to impact other childcare provisions.

### *Workforce development*

- 8.5 A key theme that emerged across all of the CSAs was the significant challenge faced by the childcare sector in recruiting and retaining staff. COVID-19

exacerbated these issues, making it even more difficult to meet the growing demand for childcare, particularly with the expansion of programmes like Flying Start. Factors reported to have contributed to staffing challenges included a decrease in students studying childcare courses, which reduced the pool of qualified candidates, and a temporary pause in promotional activities due to COVID-19 restrictions.

- 8.6 Staff retention issues also persist according to the CSAs, with low pay and high work demands cited as reasons for staff leaving childcare settings. The destinations for departing staff often included sectors outside childcare, such as education, healthcare, retail, and hospitality.
- 8.7 Training delivery played a vital role in workforce development, but the impact of COVID-19 disrupted traditional training methods according to the CSAs. Many local authorities had to adapt by shifting to online delivery for some courses, with Paediatric First Aid training being the most affected due to its practical nature. However, limited IT access, staff cover, and setting closures during the pandemic hindered practitioners' ability to access training. Despite these challenges, there has been a growing demand for further and more training related to the new Curriculum for Wales and Additional Learning Needs, highlighting the sector's commitment to enhancing its quality and standards.

#### *Barriers to accessing childcare*

- 8.8 Affordability was a major concern across the CSAs, with cost identified as a significant barrier preventing many families from accessing formal childcare. Parents/carers expressed that high childcare expenses hindered their ability to access formal care, and stakeholders, employers, and schools echoed this concern. The affordability issue disproportionately affected certain groups, including those on minimum wage, single parents, families with children aged 0-2 years not yet eligible for certain programs, and families from ethnic minority backgrounds or with children who have Additional Learning Needs (ALN).
- 8.9 Flexibility was another key issue, with working parents, especially those working atypical hours, struggling to access childcare outside of standard working hours. Providers' limited ability to offer childcare beyond 6 pm on weekdays or on

weekends, as well as their inability to accommodate shift work or part-time care, further exacerbated this challenge. While some providers had plans to extend their opening hours, as reported in the CSAs, the decline in registered childminders and the lack of flexible options for shift workers remained concerns. The lack of afterschool care and holiday provision was another notable barrier, with high demand and insufficient availability in many areas. Parents often found it challenging to secure suitable care for school-age children after school or during holidays, leading to stress and potential work disruptions. Additionally, the out-of-school sector's instability and some clubs deregistering added to this issue.

- 8.10 Geographical barriers were also highlighted, particularly in rural areas, where parents may face limited childcare options. Some parents end up traveling long distances to access childcare, which could involve crossing local authority boundaries. Population projections indicated a potential decrease in demand for childcare due to a drop in birth rates in recent years. These barriers underscored the need for proactive measures to ensure accessible and affordable childcare for all families.

#### *Additional Learning Needs*

- 8.11 A prominent theme identified in the CSAs was the difficulty parents/carers face in finding suitable childcare for children with ALN, which was worse during holiday periods and for secondary school-age children. A lack of access to appropriate childcare had led some families to rely on support networks or even give up employment according to sources cited in CSAs. Suggestions for addressing this issue included the use of nannies for ALN provision and ensuring sufficient funding for childcare providers, particularly for 1:1 support.
- 8.12 Training for staff dealing with ALN children emerged as another significant concern, with stakeholders quoted in CSAs emphasising the need for better training opportunities. Challenges related to the new ALN code in Wales were also noted. Additionally, the pandemic had a considerable impact according to many CSAs, leading to increased demand and concerns about children with ALN falling behind in their development due to lockdowns and limited access to support services.

### *Welsh-medium childcare*

- 8.13 Local authorities used various sources, including surveys and census data, to gather information on Welsh language childcare provision. They expressed a commitment to supporting the Welsh Government's Cymraeg 2050 strategy, aiming to reach a million Welsh speakers by 2050. To achieve this, local authorities set targets for increasing Welsh medium education in Year 1 and outlined plans to promote the benefits of bilingualism.
- 8.14 One prominent theme in the CSAs was the difficulty parents/carers face in accessing Welsh medium provision due to limited availability, especially for childminders. Another challenge is the limited hours of care provided by Welsh medium childcare settings, often incompatible with parents' working hours. Staff language skills also emerged as a barrier to recruiting qualified Welsh-speaking childcare professionals.
- 8.15 To address these challenges, local authorities aimed to promote careers in childcare, encourage Welsh speakers to join the profession, and provide training to improve staff language skills. The CSAs highlighted the importance of making Welsh medium childcare more accessible and meeting the needs of families seeking Welsh language provision.

### *The future of childcare*

- 8.16 The final chapter focused on the sustainability and future outlook of childcare provision in Wales, according to the CSAs.
- 8.17 Staff recruitment and retention emerged as critical challenges for childcare providers. The CSAs revealed a decline in the number of childminders in particular, a concern expressed by PACEY Cymru. Local authorities sought to promote the childcare sector as an attractive career option to address this issue.
- 8.18 Flexibility in childcare services was another topic discussed in CSAs, with Clybiau Plant Cymru Kids Club suggesting the need for greater flexibility to accommodate parents working atypical hours. However, some local authorities cautioned that excessive flexibility could be unsustainable for childcare providers.



- 8.19 The impact of the COVID-19 pandemic on sustainability was a recurring theme, highlighting financial losses, decreased demand due to remote working, and recruitment difficulties. Various grants aimed at sustaining childcare providers through the pandemic were discussed.
- 8.20 Looking to the future, the expansion of Flying Start was expected to improve accessibility to childcare. However, concerns were expressed regarding the potential gap between demand and supply, exacerbated by recruitment and retention challenges. Population predictions vary by local authority, so there is no clear overall picture as to how changes will affect childcare demand. The potential long-term effects of the COVID-19 pandemic on demand and the progress in addressing childcare gaps were also considered in CSAs.
- 8.21 Overall, the CSAs emphasised the importance of supporting childcare providers, addressing workforce challenges, and ensuring financial sustainability in the face of evolving demands and unforeseen disruptions like the pandemic.