

THE VALE of GLAMORGAN

CHILDCARE SUFFICIENCY ASSESSMENT

EXECUTIVE SUMMARY



2022

Strong  
Communities  
with a Bright  
Future

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## 1 Introduction and Context

1.1 The Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016, and recent Welsh Government Statutory Guidance issued in July 2016 places a Statutory Duty on Local Authorities to undertake a full Childcare Sufficiency Assessment at five yearly intervals.

The Assessment is a necessary step to securing 'sufficient' childcare provision in the Vale.

It aims to identify childcare-themed gaps (or potential forthcoming), and make recommendations that will meet the needs of parents and carers living in the locality.

1.2 Additional to the 2016 Welsh Government Statutory Guidance, in March 2021, the Welsh Government issued supplementary guidance for local authorities for their Childcare Sufficiency Assessment (CSA) 2022 process. This instructed that in their full assessment in 2022, Welsh local authorities would need to report on how the COVID-19 pandemic had affected the supply of and demand for childcare - and the sustainability of existing childcare providers.

1.3 The 2022 CSA was undertaken by an independent research company called Place Group Ltd in partnership with Vale of Glamorgan Council Officers.

In undertaking the full 2022 Childcare Sufficiency Assessment, the following types of research were undertaken:

- Analysis of demographic and socio-economic data from the Office of National Statistics, Stats Wales and the Office for National Statistics to give an indication of the profile of factors affecting the demand for childcare across the Vale
- Consultation with over 500 local parent/carers via a questionnaire survey undertaken in October 2021 via the Welsh Government
- Consultation with the Vale's (a) full day care providers; (b) sessional care providers; (c) registered childminders and; (d) out of school childcare providers in November 2021, to supplement...
- Analysis of Self-Assessment of Service Statement (SASS) data completed online by local registered childcare providers for Care Inspectorate Wales (CIW) in June 2021
- Consultation with children and young people in partnership with colleagues undertaking the 2022 Vale Play Sufficiency Assessment
- Consultation with local employers
- Consultation with local relevant partners, stakeholders and professionals

- Analysis of supplementary data derived from a range of additional sources including CIW
- Analysis of Family Information Service data.

1.4 Additionally, as context, the 2006 Childcare Act introduced a duty on local authorities in Wales to secure sufficient childcare in their area to enable parents to take up or remain in work or to undertake education and training in order to obtain work. It was directed that in determining whether the provision of childcare is sufficient to meet these requirements, **Welsh local authorities must have regard to: the provision of childcare involving the use of the Welsh language.**

1.5 Finally, as context, the live Local Vale Wellbeing Plan has clear relevance to the subject of childcare and early years, with one of its key objectives being to: ***give children the best start in life. Childcare strategy planners within the Vale will therefore continue to align their role and responsibilities to how they can best support the Wellbeing Plan's ongoing objectives.***

Those responsible for childcare and early years strategy at the Vale are committed to working with Wellbeing partners to play a critical part in working together to prevent poor outcomes for future generations - by (again) giving all children the best start in life.

## 2 Key Gaps

The programme of research undertaken for the 2022 Vale of Glamorgan Childcare Sufficiency Assessment has enabled the following identified gaps - or themes that the Local Authority will continue to monitor – i.e.:

2.1 Approximately 1:5 of all parents consulted in October 2021 outlined their wish for accessibility to formal childcare to continue to “*get back to normal/how it was*” in particular aligned to the (earlier) opening times of breakfast clubs and the re-opening of their after school clubs, pre the COVID-19 pandemic. Specific qualitative feedback included:

*“My after school club ceased at our primary school during COVID-19 and it has not re-started”.*

*“Our after school club has not reopened since the pandemic but I have to go back into the office for work, which means I have to rely on friends who are also experiencing difficulties”.*

*“I have big problems when the after school club closed. I now use a childminder but would prefer he was back in the after school club now COVID-19 is ‘over’”.*

*“There are limited after school options at my child’s school... and I’ve had to turn down jobs as I could not find suitable childcare”.*

*“Our school has stopped after school childcare...”.*

The local authority therefore should continue its ongoing monitoring of the extent to which this is happening in 2022-2023 (particularly in the county’s rural areas) – **and representing a sufficiency gap** – now that the restrictions associated with the COVID-19 pandemic have been progressively alleviated.

2.2 22% of the parents/carers who responded to the October 2021 Welsh Government parental survey about whether childcare acted as a barrier to them taking up employment or training denoted: *Tend to Agree*. Additionally, (once again) 22% of the responding parents/carers also stated: *Strongly Agree*.

**This indicates that 44% of responding parents/carers believed that – to an extent – childcare had, at some recent point, been acting as a barrier to them accessing employment or training.**

Supplementing this feedback, 21% of responding parents/carers stated that in the last year, issues surrounding childcare had affected themselves being able to 'take on new a job' - and 19% of parents/carers stated that in the last year, issues surrounding childcare had affected themselves or a partner being able to 'access training'.

Therefore, it can be concluded, in the Vale, suitable childcare continues to represent a challenge for certain parents when it comes to supporting their employability.

2.3 The most repeated trend experienced in the past two years, reported by setting-based providers and childminders was parents wanting more flexibility. The second most frequent reported (and associated) trend was that there had been an increase in the numbers of parents requesting extended/longer opening hours. However, in response to the autumn 2021 survey, only 4% of responding childcare providers stated that they had plans to extend their opening hours.

It is evident that a gap exists in terms of certain working parents ideally requiring earlier opening hours and later closing hours, and being unable to locate and access such provision.

2.4 Related to point 2.3, just 6% of responding early years childcare providers and 10% of responding registered childminder stated that they had plans in place over the next 18 months to 'better meet the needs of shift workers/those who work outside typical office hours'.

However there was a notable quantity of qualitative feedback as an outcome of the Welsh Government parental survey, that (possibly as a result of COVID-19) that the incidence of a requirement for shift working and working outside of traditional 8am-6pm hours was increasing.

It is important to note that the childminding sector (as well as the wider registered childcare sector) will quite possibly be essential to address this need, given its traditional ability to offer more flexibility aligned to opening times - and that in 2022, there are 103 childminders compared to 166 in 2017.

2.5 20% of all responding childcare settings/groups stated that they had seen members of their workforce exit because of the pandemic, which was indicative of a theme that is becoming evident throughout Wales, that retention and recruitment is proving to be a growing problem. Indeed at the opposite end of the 'pipeline' it can be observed that as an outcome of the autumn 2021 consultation with early years childcare providers, the majority, 40% stated that they had no plans in late 2021 to recruit any apprentices.

(It should also be noted that, with regard to issues affecting the Vale's childcare workforce, approximately 1:4 of all representatives of childcare providers who were consulted in autumn 2021 stated that either themselves (including childminder) or members of their team/workforce had experienced mental health difficulties and problems during the height of the COVID-10 pandemic or may be continuing to do so).

2.6 In early 2022 the Welsh Government announced plans in terms of enhancing the ability of parents and families who have two-year olds to access universal funded childcare provision. In order to meet a potential forthcoming demand for such provision, the Vale of Glamorgan Council should be mindful that:

1. 36% of early years childcare providers/settings said they had a waiting list in autumn 2021 – most frequently for 2 year old places;
2. a repeated trend stated by relevant childcare providers was an increase in demand for places for 2 year olds.

Therefore, a 2 year old places sufficiency gap that emerges *might possibly* emerge as the universal 2 year olds places programme begins to be rolled out in September 2022.

2.7 43% of parents who responded to the Welsh Government parental survey stated that they intended to access *more* childcare in the forthcoming years – and this was most frequently a type of out of school childcare. Indeed the two types of childcare that were highlighted with the highest frequency by relevant parents were:

- Before School/Breakfast Club = 49% - of relevant parents
- After School Club = 43% - of relevant parents

However parents that responded to the October 2021 Welsh Government parental survey consistently and repeatedly stated how they were experiencing challenges and difficulties accessing out of school childcare-themed wraparound care. Therefore, this suggests a sufficiency gap could be evident or may grow in emphasis, particularly as the population in the Vale continues to increase.

2.8 9% of parents/carers who responded to the October 2021 parental demand survey outlined that they had at least one child with diagnosed and/or undiagnosed additional learning needs. Qualitative feedback from the survey incorporated a repeated incidence of certain parents outlining their challenges to identify and/or secure suitable and affordable formal childcare.

For example, feedback included:

*“Finding childcare for a disabled child is almost impossible, or what there is [in my experience] is 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...”*

*“My seven year old daughter is ‘Autistic’, and I worry about finding appropriate after school care”.*

*“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”.*

*“I have never been able to find a childcare provider to look after my disabled child”.*

Additionally, in response to the autumn 2021 consultation with childcare providers, 71% of early years childcare providers/settings and almost 50% registered childminders stated that COVID-19 had had an impact on the early years development of children attending their provision, with the such respondents frequently stating that children’s speech and language had been negatively affected and/or that they had seen issues around some children not socialising with other children/had seen an increased incidence of separation anxiety.

Although one-third of early years childcare providers/settings stated that they had plans in place to further enhance provision for children with additional learning needs, only 6% of childminders state that they had such plans.

It is therefore concluded that as the incidence of ALN children continues to grow, there needs to be a corresponding frequency of childcare providers having the ability to provide suitable and affordable places for these children, to mitigate a sufficiency gap.



2.9 There is a trend that the incidence of Welsh speaking in the Vale locality is continually, year-on-year, steadily increasing and that the number of parents and families that request Welsh-medium childcare continues to increase. In July 2021, (only) six childcare providers – three full daycare providers and three sessional daycare providers – stated that the main language that their service was provided through was Welsh.

Encouragingly, 41% of all childcare providers stated in autumn 2021 that they had either definite plans in place to create more Welsh-speaking/medium places or that this is something that they would maybe consider, however the local authority needs to continue to monitor the incidence of accessibility to Welsh-medium childcare places aligned to the ambitions of specific families.

2.10 The most recurrent barrier to accessing formal childcare that was highlighted by parents/carers who responded to the Welsh Government parental survey was that the cost of childcare had prevented them from accessing a formal provision. The Vale of Glamorgan Family Information Service therefore need to **continue to** communicate and disseminate information about existing funded childcare initiatives and forthcoming *new initiatives* such as: (a) the extension of the Childcare Offer to parents in education and training and parents who are on adoption leave and: (b) the offer of free childcare to all two-year-olds within the next three years, given how logical it is that these two initiatives will benefit specific families. The local authority should also be mindful of the fact that 32% of early years childcare providers/settings that responded to the autumn 2021 CSA survey stated that they did not take any actions to market the existence of Tax Free Childcare.

2.11 Essentially, The population of the Vale is forecast (by Welsh Government) to **increase** by 6% between 2022 – 2028.

If this percentage is applied to the population of 0-4 year olds in 2020, this would result in approximately 430 more resident 0-4 year olds by 2027-2028 and if this percentage is applied to the population of 5-14 year olds in 2020, this would result in approximately 965 more resident 5-14 year olds by 2027-2028. This population increase will be generated by a population inflow being higher than an outflow from the Vale and the construction, completion and occupation of new housing developments at sites such as The Phase 2 development of Barry Waterfront, the Eglwys-Brewis development in the St. Athan ward and the development in Cowbridge.

It can also be noted that when parents/carers were invited (as part of the Welsh Government parental survey) to state what type(s) of childcare they anticipated requiring 'more of' in the next two years, **this was most frequently a breakfast club (64% of relevant parents) or an after school club**

**(58%)** and childcare planners could need to strategise to ensure that the population increase does not account for a gap in access to this type of provision, at schools and with private sector providers.

2.12 There exists specific geographical areas where there is a relatively high population of cohorts of children – however a relatively low incidence of (a relevant type of) registered childcare provision. For example:

The Cadoc ward accounts for (a relatively high – in comparison with other wards) 655 0-4 year olds – however there is in 2022, 0 full day care providers and 0 sessional care providers situated in the ward

The Cadoc ward also has (a relatively high – in comparison with other wards) 905 resident 5-11 year olds – however there is in 2022, 0 registered out of school childcare situated in the ward.

The Gibbonsdown ward has (a relatively high – in comparison with other wards) 717 resident 5-11 year olds – however there is in 2022, 0 out of school childcare care providers situated in the ward.

The Baruc ward accounts for (a relatively high – in comparison with other wards) 411 0-4 year olds – however there is in 2022 (only) 153 places accessible with early years registered childcare providers in this ward. This should also be viewed within the context that as an outcome of the autumn 2021 survey with full daycare providers and sessional care providers: one stated that they had vacant places at that time, totalling: 10 places - however, one stated that they had a waiting list, totalling 61 places.

Similarly the Butrills ward accounts for (a relatively high – in comparison with other wards) 425 0-4 year olds – however there is in 2022 (only) 147 places accessible with early years registered childcare providers in this ward. This should also be viewed within the context that as an outcome of the autumn 2021 survey with full daycare providers and sessional care providers: three stated that they had vacant places at that time, totalling: 14 places for 0-4 year olds - however, two stated that they had a waiting list, totalling 5 places.

### 3 Key Recommendations

Aligned to the gaps analysis the following recommendations have been developed and which are reflected in a 2022-2027 Vale of Glamorgan Childcare Sufficiency Action Plan.

- 3.1 **Recommendation 1:** Vale of Glamorgan Council officers, plus employability professional partners, should continue to work in partnership to address and monitor financial support for local parents and carers,
- 3.2 **Recommendation 2:** The Vale of Glamorgan Council should continue to monitor the incidence of childcare providers' opening and closing times, along with opportunities for 'flexibility' that accommodate Vale of Glamorgan families' working patterns, with a priority focus on early morning opening times at all childcare settings.
- 3.3 **Recommendation 3:** The Vale of Glamorgan Council should continue to take a lead on retention and recruitment (including of apprentices) to their local early years and childcare workforce. They should demonstrate to key partners such as leaders at childcare providers, Cardiff and Vale College and CWLWM partners their commitment to a recruitment and retention drive.
- 3.4 **Recommendation 4:** The Vale of Glamorgan Council should prioritise the establishment of additional 3 & 4 year places via the expansion of Childcare Offer funding along with places for the 2 year old cohort within the pre-school sector - in order to help meet a probable increase in demand for such places that will be a national outcome of the Welsh government's universal childcare for 2 year olds programme, which is due to be initiated in autumn 2022.
- 3.5 **Recommendation 5:** The Vale of Glamorgan Council should continue to support its early years, childcare and play sector to implement the ambitions of the ALN Transformation Programme, which was initiated in the country in autumn 2021.
- 3.6 **Recommendation 6:** The Vale of Glamorgan Council should retain an awareness that the incidence of parents and children having an interest in Welsh-medium childcare may continue to increase as the profile and outcomes of Cymraeg 2050 Strategy continues to progress, and that although expanding such provision may not be an immediate priority, it should continue to feature in thinking and planning for new provisions/places.
- 3.7 **Recommendation 7:** The Vale of Glamorgan Council should continue to prioritise supporting the childcare sector to aid COVID recovery through grants to support sustainability and/or increase childcare places - and share information issued by Welsh Government on changes with COVID-19 advice and guidance. It should also retain an awareness of the ongoing challenges faced by the sector and offer the opportunity to express concerns through termly forums

## 4 Fundamental Supply of Childcare in the Vale

4.1 Table 1 - In February 2022, Care Inspectorate Wales (CIW) reported the following number of childcare providers in the Vale of Glamorgan aligned to type:

Type of childcare	Number of childcare providers	Number of childcare places
Full day care	40	1,747
Sessional care	16	447
Childminders	103	818
Out of school care	18	785
Creche	2	24
Total	180	3,821

4.2 To supplement Table 2 above, the 2022 main Childcare Sufficiency Assessment reported that:

a) In terms of childcare provisions/settings that have deregistered in the last 5 years since 2017: 74 settings have closed/concluded, representing a net loss in the Vale of 536 places. Specifically:

- 61 childminders have exited that sector across the Vale
- 1 day nursery and a holiday club - in Barry have closed
- 2 after school clubs: 1 in Llandough and 1 in Barry have closed
- 2 playgroups: 1 in Peterston-Super-Ely ward and 1 in Penarth have closed
- 1 creche: in Barry has also closed.

However, there have been 27 new childcare providers/settings that have registered with CIW since 2017, gaining 684 places:

- 8 childminders
- 8 full day care settings
- 4 sessional daycare settings
- 5 out of school care settings.

#### **4.3 The Vale Family Information Service (FIS) continue to have a key local role in terms of the provision of information about local childcare options.**

The FIS is a one-stop information service for parents and carers of children and young people aged 0-20 years in the Vale of Glamorgan, as well as for professionals working with families. Parents can contact the FIS for information on their childcare options, help with childcare costs, groups and activities for children and families, as well as support services.

The FIS maintains a database of childcare settings, as well as other activities and services, and use the Dewis Cymru website to host this information, which feeds through to the national Childcare Information Wales website: [www.childcareinformation.wales](http://www.childcareinformation.wales)

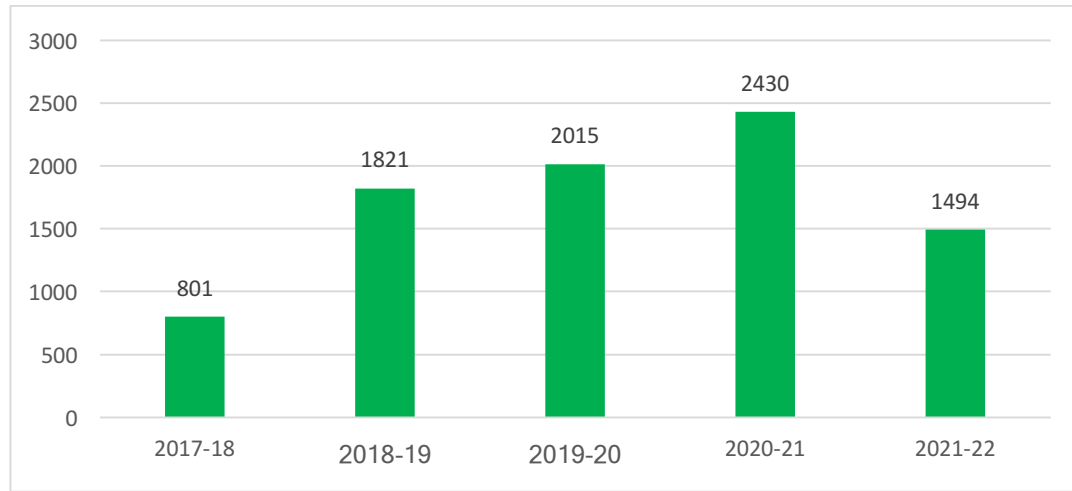
Parents, providers and professionals can contact the FIS directly by telephone, email, social media and they can find a wealth of information on the FIS web pages, including help with childcare costs, parenting support, starting nursery school. The FIS can be viewed at [www.valeofglamorgan.gov.uk/fis](http://www.valeofglamorgan.gov.uk/fis)

The FIS Facebook page now has over 3,000 followers and is an essential tool to impart information to parents and carers.

Since the 2017 Vale of Glamorgan Childcare Sufficiency Assessment was published the FIS has received over 8,500 enquiries. The highest number of enquiries were received in 2020 – 2021, due to the COVID-19 pandemic, when FIS processed over 400 applications for the Coronavirus Childcare Assistance Scheme (CCAS), sourcing childcare for key workers.

**Diagram 1 - Number of Enquiries to the FIS year on year**

Source: Vale FIS 2022

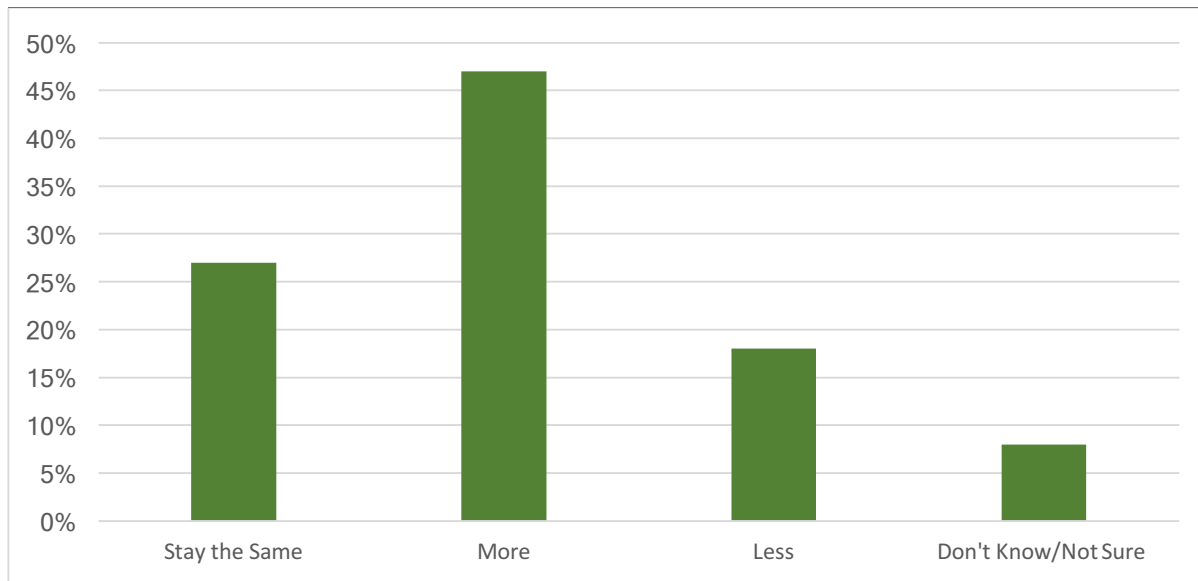


Every year, the enquiries tend to vary in their nature. However, the majority of enquiries over the last 5 years – since the 2017 vale of Glamorgan Childcare Sufficiency Assessment was published - have been for/about either childcare (23%) or the Childcare Offer (34%).

## 5 Fundamental Demand for Childcare in the Vale

5.1 The 500 parents and carers who responded to the Welsh Government survey in 2022, provided key feedback which included in response to a question: *Do you anticipate you will need more or less childcare in the next couple of years?* – their collective response is outlined in Diagram 2 below:

Diagram 2 - Consideration of whether more or less childcare will be accessed in the next 2 years



Those parents who stated 'More' were also requested to state the types of childcare that they would indeed seek to access through that intention, with the three most frequent being:

1. Before School/Breakfast Club – 64% of relevant parents
2. After School Club – 58% of relevant parents
3. Day Nursery – 47% of relevant parents

5.2 Table 2 below indicates the frequency with which responding parents/carers stated that they used specific types of childcare **during term-times** in late 2021.

Table 2 - Frequency with which responding parents/carers stated that they used specific types of childcare during term-times

Type of childcare registered or non-registered childcare	Percentage of relevant responding parents/carers
Childminder	13%
Before School or Breakfast Club	29%
After School Club	20%
Private Day Nursery	37.5%
School-based Nursery	9%
Sessional Playgroup	7.5%
Cylch Meithrin	3.5%
Drop-Off Creche	0.5%
Nanny	1%
Au-Pair	0
Family/friends (paid)	3.5%
Family/friends (unpaid)	52%
Stated <i>none during term time</i>	10%



Correspondingly, Table 3 below indicates the frequency with which responding parents/carers stated that they used specific types of childcare **during holiday times**.

Table 3 - Frequency with which responding parents/carers stated that they used specific types of childcare during holiday-times

Type of childcare registered or non-registered childcare	Percentage of relevant responding parents/carers	% difference with term time
Childminder	13%	No change
Holiday Club or Playscheme	17.5%	n/a
Private Day Nursery	33%	-4.5%
Pre-prep Private School	n/a	n/a
Sessional Playgroup	4%	+3.5%
Cylch Meithrin	0.5%	-3%
Drop-Off Creche	0	No change
Nanny/Au-Pair	1%	No change
Playscheme	5%	n/a
Family/friends (paid)	2%	-1.5%
Family/friends (unpaid)	54%	+2%
Stated <i>none during school holidays</i>	8.5%	1.5%

5.3 The 2021 Welsh Government parental survey invited its target audience to give feedback about any barriers that they had encountered with regard to them accessing childcare *of their choice*. The collective feedback of the parents/carers is summarised in Table 4 below.

Table 4 - frequency of reasons stated as to why a parent/carer was not accessing/receiving support with childcare in autumn 2021

Reasons/Barriers	Percentage of relevant responding parents/carers
Child is on a waiting list for a provider & we are waiting for a place	0
There is no childcare with sufficient quality	3.5%
There is no suitable Welsh Language provision	2%
No suitable provision in our language, neither Welsh nor English	0
The childcare available is not flexible enough for my needs	7%
<b>The cost of childcare is too expensive</b>	<b>14.5%</b>
Childcare times are unsuitable	5%
There is no childcare available that is suitable for my child's age	5%
There is a problem with transport	1.5%
There is no childcare where I need it to be	4%
There is no childcare that can cater for my child's specific needs	3%
I only use childcare on an ad hoc basis and it is impossible to plan	4%
Other	2%

Further scrutiny of the quantitative data generated by the Welsh Government parental survey indicated that:

The three most frequent **barriers that were reported by working parents** were (in order of frequency):

1. The cost of childcare is too expensive (stated by 13.5% relevant parents)
2. The childcare available is not flexible enough to meet my needs (5%)
3. Childcare times are unsuitable (5%)

The three most frequent **barriers that were reported by parents evidently seeking work or training** were:

1. The cost of childcare is too expensive (stated by 29% relevant parents)
2. The childcare available is not flexible enough to meet my needs (22%)
3. There is a problem with transport (15%)

The three most frequent **barriers that were reported by parents who were actually studying or training** were:

1. The cost of childcare is too expensive (stated by 17% relevant parents)
2. Childcare times are unsuitable (12%)
3. There is no childcare with sufficient quality (9%)

Finally, the three most frequent **barriers that were reported by carers of a child with additional learning needs** were:

1. There is no childcare that can cater for my child's specific needs (27% of relevant parents) and then;
2. The cost of childcare is too expensive (stated by 17% relevant parents)
3. There is no childcare with sufficient quality (stated by 15% relevant parents)

5.4 From a fundamental demographic perspective, **projections published by the Welsh Government report that the population of the Vale of Glamorgan is forecast to increase by 6% during the period 2018-2028.** The same source estimates that from 2019-2039 the Vale of Glamorgan's population will grow by 3.9% or 5,501 people.

Essentially, this means that by the year 2028 there could be approximately 365 more 0-4 year olds resident in the Vale and approximately 838 more 5-14 year olds resident in the Vale.