



City and County of Swansea Childcare Sufficiency Assessment

Summary 2017 - 2022



Gwasanaeth Gwybodaeth i Deuluoedd Abertawe
Swansea Family Information Service

Contents

1. Introduction	Page 3
The Childcare Sufficiency Assessment (CSA)	Page 3
Methodology	Page 5
2. Is there sufficient childcare across Swansea in 2017?	Page 6
3. Key Findings	Page 9
Demand for childcare	Page 9
Supply of childcare	Page 16
4. Gap Analysis	Page 27
Geographical and Type gaps	Page 27
Income gaps	Page 29
Specific needs gaps	Page 29
Time gaps	Page 30
Age gaps	Page 30

2017 Childcare Sufficiency Assessment Summary

1. Introduction

The Childcare Sufficiency Assessment

- 1.1 In April 2008, the Welsh Government issued formal guidance to Local Authorities, setting out their legislative requirements under the Childcare Act.

The Childcare Act 2006 continues to require that all Local Authorities in Wales:

- Undertake and update Childcare Sufficiency Assessments
- Ensure sufficient childcare is accessible in their area; and
- Provide information, advice and assistance to parents, prospective parents and those with parental responsibility or care of a child, relating to childcare...

...Essentially, Section 22 of the Act places a duty on Welsh Local Authorities to secure, as far as is *reasonably practicable*, the availability of childcare that is sufficient to meet the requirements of parents in their area who require childcare in order to take up work, remain in work, or to undertake education or training.

Each Local Authority in Wales undertakes their own local childcare sufficiency assessments, which are a requirement of that Act.

- 1.2 In July 2016, the Cabinet Secretary for Communities and Children published an updated Childcare Sufficiency Statutory Guidance which set out how the views of its informal childcare working group had been taken into account, in refining the Childcare Sufficiency Assessment process – in relation to a local authority's duty to assess and secure sufficient childcare provision. It was stated that this would result in:

- a more consistent and standardised approach to capturing and reporting data, to inform the development of national policies and programmes and provide an all-Wales level picture of provision
- a more usable information source, which will enable local authorities to efficiently manage and assess the sufficiency of childcare provision
- more clarity for local authorities about the information to be captured and assurance that the statutory requirements of the duty are being met
- a less burdensome and more proportionate approach
- better alignment and integration across key planning and assessment processes at a local and national level

- 1.3 A revised Childcare Sufficiency Assessment guidance – which can be viewed at:<http://gov.wales/docs/dcells/publications/160714-childcare-statutory-guidance-en-v2.pdf> – also outlined how each local authority must also produce a Childcare Sufficiency Assessment Action Plan that “*removes shortcomings and maintain the strengths identified in the Childcare Sufficiency Assessments*”.

This guidance also stated that “*The Childcare Sufficiency Assessment Action Plans should be kept under continuous review and updated and reported upon on an annual basis via progress reports. Each year local authorities should aim for continuous improvement in securing sufficient childcare provision*”.

- 1.4 One key feature of the **main** childcare sufficiency assessment report – which was published in late March 2017 is that the process feeds back on (localised) demand compared to (localised) supply – i.e.: assessing the demand for childcare for each type of childcare provision and; assessing the supply of childcare for each type of childcare provision.
- 1.5 The City and County of Swansea’s 2017 Childcare Sufficiency Assessment – and its accompanying Action Plan was submitted to the Welsh Government in late March 2017 – in accordance with timescales directed by the Welsh Government. The City and County of Swansea’s 2017 Childcare Sufficiency Assessment will cover the period 2017 – 2022 with the following requirement to update:

31 March 2018	Progress Report
31 March 2019	Progress Report
31 March 2020	Progress Report
31 March 2021	Progress Report

- 1.6 For the 2017 Swansea Childcare Sufficiency Assessment an additional subject has required focused and supplementary analysis: the proposed increase of the free entitlement for 3 and 4 years, to a maximum amount of 30 hours per week – with 10 hours foundation phase and 20 hours childcare.

The Welsh Government have now committed to offering working parents of 3 and 4 year olds free childcare on top of the Early Years Foundation Phase for 48 weeks of the year. In November 2016, six Local Authorities were chosen to work with the Welsh Government to pilot this new childcare offer – one of which was the City and County of Swansea. The pilot in certain locations of Swansea will commence in September 2017.

Essentially therefore, the 2017 Swansea Childcare Sufficiency Assessment sought to determine two relevant factors, in preparation for autumn 2017:

1. The extent to which Swansea-based early years childcare providers and registered childminders believed that they would be (a) *willing* and (b) *able to* help deliver the increased entitlement?
2. The extent to which (relevant) local parents believed that they would hypothetically be interested in accessing the increased entitlement – and the extent to which they would seek to access the maximum number of proposed hours.
3. The relative frequency with which parents would potentially choose to access specific types of childcare provider(s) for the additional hours.

Methodology

- 1.7 This interim summary report incorporates (to follow) brief information on the consultation methodologies and data collation procedures used to inform and produce the 2017 Swansea Childcare Sufficiency Assessment. The summary report itself in (a) Section 3 (pages 9 – 26) outlines the preliminary findings and key messages that are emerging and in (b) Section 4 summarises evident/emerging gaps within the Swansea locality's 'childcare market' (pages 27 – 30).
- 1.8 The City and County of Swansea consulted widely for the 2017 Childcare Sufficiency Assessment. As with the 2014 CSA a mixed method, quantitative and qualitative research protocol was designed. Key elements of the 2017 CSA were:
- Telephone and (supplementary) face-to-face interviews with parents and carers who are resident throughout the Swansea local authority area. This incorporated an ambition to ensure that a sample were representing families where the Welsh language was spoken
 - A supplementary on-line Parents Survey which was posted on the local authority web-site during late October 2016 – late December 2016
 - Structured telephone interviews with the localities formal childcare providers and its (known) informal childcare providers – including those designated within the Childcare Approval Scheme
 - An on-line and telephone survey with the locality's primary and secondary schools, including in order to determine the extent to which they were offering out of school childcare in the form of before school provision – aka breakfast clubs
 - An on-line and paper copy survey with Swansea's notable employers
 - Structured consultation sessions with children and young people who represented three age groups: 2 – 4 year olds; 5 – 7 year olds; 8 – 11 year olds
 - An analysis of key demographic factors which can reasonably affect Swansea's localised childcare market – including existing and projected population levels of children and young people and proposed new housing developments/dwelling yields
 - (Crucially) an analysis of the supply of childcare, as of a fixed point in time – which was November 2016 – including determination of places accessible via the free entitlement for 3 and 4 year olds and the Flying Start programme

The following organisations and groups were also invited to comment on localised childcare sufficiency:

- The Office for the Children's Commissioner for Wales
- Western Bay Safeguarding Children's Board
- Swansea Welsh Medium Education Forum
- Swansea Play Network
- Jobcentre Plus Swansea

- Cwlwm partners including: Clybiau Plant Cymru Kids' Clubs, Mudiad Meithrin, National Day Nurseries Association (NDNA Cymru), PACEY Cymru and Wales Pre-School Providers Association (Wales PPA)

1.9 A range of external data providers were utilised – for example, StatsWales, Data Unit Wales and the Office for National Statistics.

The 2017 CSA has also been informed by (a) the Self-Assessment of Service Statement (SASS) report, which the majority of childcare providers in Wales submitted part one of in summer 2016 – which was a CCSIW requirement and (b) the (autumn 2016) Cwlwm Wales-wide childcare workforce survey – the primary aims of which were to (i) provide information on the levels of qualifications currently held by those in the childcare sector (ii) identify training needs and explore issues around access to childcare and early years themed training.

2. Is there sufficient childcare across Swansea in 2017?

2.1 Demonstrably the City and County of Swansea has an extensive and broad range of childcare provision that matches the geographical, economic and employment needs of the Local Authority.

The forthcoming advent of the enhanced free entitlement for 3 and 4 year olds – including via the pilot programme – will further supplement this portfolio of provision.

2.2 At the time of this CSA's production, the City and County of Swansea have 225 CCSIW registered formal childcare providers offering a range of (types of) childcare places. These childcare providers include:

- Full daycare settings
- Sessional daycare settings
- Registered childminders
- Out of school childcare providers – including a number of after school clubs, breakfast clubs and holiday playschemes

The locality, within its sessional sector, also hosts three Welsh medium pre-school childcare provisions, supported through groups affiliated to Mudiad Meithrin (MM) and Welsh medium nursery education, for parents who require a Welsh Medium Education Service.

An informal childcare sector also exists and thrives, in the form of (in autumn 2016):

1. Approved Childcare Providers i.e. home childcarers and nannies
2. Playschemes that are convened at Swansea locality-based Leisure Centres

It should also be noted that 31 childcare providers are currently voluntary suspended as they could decide at any point to start trading again².

Finally, the statutory and voluntary organisations operating throughout the locality continue to offer an integrated approach with specialist services for children and young people with disabilities/additional needs. These services are designed to ensure children who have a diagnosed or emerging disability are referred to the most appropriate service, and that chosen childcare providers can accommodate a disabled child/young person at no extra cost to themselves or the parent.

- 2.3 As for the 2014 Childcare Sufficiency Assessment, a key issue that continues to concern (and influence) parents and carers is affordability. The subject of quality has also been highlighted repeatedly during the 2017 research. It is evident however that the majority of parents and carers were satisfied with their existing childcare arrangements, be it through them accessing formal childcare provision, or not being *reliant* on such provision – or simply choosing to not access such formal childcare, including due to a preference for accessing family members or friends.
- 2.4 However, the 2017 Swansea Childcare Sufficiency Assessment highlighted how for families who are reliant on formal childcare – commonly so that a parent is/parents are able to go to work – there may be an approaching pressure to locate a suitable formal childcare place due to:
1. New housing developments taking place across the Swansea locality which this CSA forecasts may result in a need for approximately 684 new early years childcare/education places for 2, 3 and 4 year olds during the period up to 2020
 2. The Welsh Government's forecast that the number of children aged 8 – 15 years resident in Swansea will increase in forthcoming years
- 2.5 Additionally – aligned to 2.3 above – the 2017 Swansea Childcare Sufficiency Assessment is also highlighting that a possible North – South divide exists with regard to the issue of how affordable parents find paying for formal childcare – with, essentially, parents resident in the North of the locality experiencing more difficulty in affording provision.

² 27 Registered Childminders; 1 Sessional Daycare provider, 1 Holiday Playscheme; 2 After School Clubs.

2.6 Finally, an issue which a number of parents highlighted during the 2017 CSA Parents Survey was that ideally formal childcare provision should be situated in relatively close proximity to where they live, if they were to consider accessing it. Our analysis reassures that parents and carers resident in all locations across the Swansea locality would not fundamentally have to travel overly long distances in order to access some type of childcare place.

3. Key Findings

Demand for Childcare – as evidenced via 2017 CSA Survey with Parents and Carers

3.1 In terms of evident demand for and usage of unregistered childcare in late 2016/early 2017, the 2017 CSA Parents Survey determined – as did the previous 2014 CSA – that grandparents, other family members and friends *still* play a vital role in terms of supporting parents who are resident in Swansea. Essentially, 40% of the interviewees for the 2017 CSA Parents Survey confirmed that – to some degree – they used such informal childcare.

3.2 In terms of evident *emerging* demand for and usage of formal, registered childcare in late 2016:

28% of respondents stated – Yes, I use childcare for all of my children
16% of respondents stated – Yes, I use childcare for some of my children
and...

56% of respondents stated – No, I don't use formal childcare at the moment

3.3 Approximately 45% of respondents stated that they were accessing at least one type of formal childcare. These responding parents and carers were evidently accessing the following three types of childcare provision with the highest frequency – in order of frequency:

1. Out of school childcare – 45% of applicable parents/carers
2. Full daycare – 25%
3. Sessional daycare, including a Cylch Meithrin playgroup – 10%

...with the most frequent reason for accessing formal childcare in the present being: to enable me to go to work (69% of applicable parents/carers), followed in frequency by: for social or learning benefits for my child(ren) – 17%.

3.4 A statement that responding users of formal childcare most frequently agreed with was: I am satisfied with the quality of my childcare during term time and/or holiday time. However, 69% of users of formal childcare agreed that (in their opinion) such childcare is too expensive.

In terms of the statement: I would like my child/children to attend *more* registered childcare – i.e. increase their hours, 29% of applicable respondents stated agree. In terms of the statement: I would prefer to use family/friends for childcare, 41% of applicable respondents agreed with the sentence and 33% disagreed with the statement.

3.5 Three most frequently stated potential improvements to a parent's/carer's day-to-day formal childcare experience, during term-time were – in order of frequency:

1. Childcare could be more affordable
2. Childcare could be available (more) after school, 3.30pm – 6.00pm
3. Childcare could be available (more) before school, 7.30am – 9.00am

Three most frequently denoted potential improvements to a parent's/carer's day-to-day formal childcare experience, during holiday-times were – in order of frequency:

1. Childcare could be more affordable
2. Childcare could be available (more) after 6.00pm
3. Childcare could be available (more) during weekends

3.6 The majority of parents who had a 3 and/or 4 year old were evidently accessing a free entitlement place at a local primary school (something which they commonly referred to as a “*school place*”. Of those parents who had a 3 and/or 4 year old who were not accessing an applicable free entitlement place, the most frequently stated reason for not doing so was: I did not know about the “*free entitlement*” (stated by 10% of applicable parents).

All parents and carers who had a child aged 1, 2 and/or 3 years were asked:

Hypothetically do you think you may be interested in having a Free Early Years Education place which is more than 10 hours/week – possibly up to 30 hours maximum, including a maximum of 20 hours childcare?

82% of parents stated: yes – and 9% of parents stated: no. 9% of applicable parents stated: don't know.

The most frequent amount of hypothetical hours stated was 30 – by 80% of applicable parents. The *average* amount of hypothetical hours stated was 27 hours – and 35 minutes. The most frequently stated type of childcare provider where such parents would (again hypothetically) envisage accessing (a proportion of) such an extended entitlement was a full daycare setting (73% of applicable parents), followed in frequency by a sessional daycare setting (23% of parents).

3.7 With regard to those parents who had a 2 year old, were living in a designated Flying Start locality but *were not* accessing a Flying Start place – the most frequent reason for not doing so was: I do not think my child would benefit.

3.8 (Only) 10% of parents who were accessing formal childcare were evidently claiming the childcare element of working tax/universal credit.

Additionally, approximately 15% of all parents stated that they intended to claim the tax free childcare or assistance through an Employer-supported scheme in the future. Those parents who stated that they did not intend to claim through

the scheme most frequently stated that this was because: I know I am not (going to be) eligible.

- 3.9 In Swansea, the proportion of children aged 3 – 4 years who can speak Welsh increased from 10.5% in 2001 to 14.6% in 2011, with a slight increase also in the 5 – 15 years age group, rising from 25.2% in 2001 to 26.0% in 2011.

As an outcome of the 2017 Swansea CSA Parents Survey, 15% of childcare users stated that their child(ren) was accessing a Welsh-medium childcare setting.

14% of all parents stated that they had, or were, experiencing a barrier to accessing a Welsh medium provision – most frequently: there is no such provision available local to me. It was also noted that of *all* the parents who were consulted, 48% stated that ideally they would wish for their child/children to be bilingual in English and Welsh.

- 3.10 Approximately 55% of the respondents to the 2017 CSA Parents Survey reported that they did not use formal childcare, at the present time. Of these parent and carers, the most frequent reason for this was that: my family/friends look after my child(ren), followed in frequency by: I am/my partner is a stay at home parent and I have no need for childcare. 16% of non-users of formal childcare stated that the reason they were not accessing such provision was: its cost.

However – essentially – only 15% of such parents stated that at some point in the past, childcare *had not* been available when they needed it. Evidently if these respondents were to consider accessing childcare in the future – the most frequent issue that was stated as being of relative importance was that: the childcare would need to be affordable (51% of applicable parents) followed in frequency by: the childcare would need to be of good quality (50%) and then the childcare would ideally be located in close proximity to where I live (30%).

- 3.11 Parents who stated an intention to access a type of formal childcare in the future are highlighting the following two broad types of provision with the highest frequency:

1. Full daycare place
2. Out of school childcare place

...with the most frequent reason for intending to access formal childcare in the future being: to (continue to) enable me to go to work.

Demand for Childcare – as evidenced via the 2017 CSA Employers Survey

3.12 The employer consultation exercise revealed the following feedback to the question: *In your opinion is the current childcare provision in Swansea appropriate to meet your employees' needs?:*

Yes = 25%

No = 8 %

Don't Know = 67%

Additional Key Findings include:

- 1 : 3 of responding employers stated that in the past two years *they* had experienced a recruitment and/or retention issues related to certain employees' childcare situation(s)
- A statement that employees most frequently stated that either they (a) agreed with or (b) *strongly* agreed with was "*childcare provision should be more affordable*"
- The type of childcare related benefit(s) or financial support towards childcare that an employer most frequently offered or organised was childcare vouchers

Demand for Childcare – as evidenced via 2017 CSA Survey with Children and Young People

3.13 Our consultation with children aged 2 – 4 years, 5 – 7 years and 8 – 11 years revealed that sufficiency of childcare tends to be individual to families resident in Swansea. Also, ideally, in order for childcare to be sufficient, a range of opportunities for families and children need to be available.

Additional Key Findings include:

- Children aged 2 – 4 years told us that (free) play was a very important part of their childcare experience
- Children aged 2 – 4 years travel to and from their daycare most frequently by walking, followed in frequency by a car
- Grandparents play a vital informal role in helping to provide childcare for 2, 3 and 4 year olds
- Children aged 5 years and over frequently enjoyed more physical types of (free) play, including being outdoors – when at a childcare setting
- Children aged 5 years and over evidently noticed, and had clear thoughts on, the type(s) of food they received when at childcare
- There was a higher incidence of children aged 5 years and over reaching (out of school) childcare by car, thus – it can be assumed – such children were travelling relatively longer distances to reach their childcare in comparison to young children (aged 2 – 4 years)

Demand for Childcare – as evidenced via Demographic and Socio-Economic analysis

3.14 ONS mid-2015 population figures indicated that the highest number of 0 – 2 year olds are evidently resident (in order of frequency) the following three wards:

1. Penderry ward
2. Llansamlet ward and the bordering...
3. Morryston ward

ONS mid-2015 population figures indicated that the highest number of 3 – 4 year olds are evidently resident (in order of frequency) the following three wards:

1. Penderry ward
2. Llansamlet ward and the bordering...
3. Morryston ward

ONS mid-2015 population figures indicated that the highest number 5 – 7 year olds are evidently resident, again (in order of frequency) the following three wards:

1. Morryston ward and the bordering...
2. Llansamlet ward
3. Penderry ward

ONS mid-2015 population figures indicated that the highest number of 8 – 11 year olds are evidently resident (in order of frequency) the following three wards:

1. Morryston ward and the bordering...
2. Llansamlet ward
3. Penderry ward

ONS mid-2015 population figures indicated that the highest number 12 – 15 year olds are evidently resident (in order of frequency) the following three wards:

1. Morryston ward and the bordering...
2. Penderry ward
3. Llansamlet ward

- 3.15 Population projections published by the Welsh Government in 2015 indicate the following percentage *changes* in the populations of specific cohorts resident within the Swansea local authority area...

Age Cohort	Resident Population 2017	Resident Population 2020	% increase 2017– 2020
0 – 2 years	7,423	7,533	+1.5%
3 – 4 years	5,134	4,997	-2.6%
5 – 7 years	8,142	7,953	-2.3%
8 – 11 years	10,549	10,854	+2.8%
12 – 15 years	10,103	10,473	+3.5%
Total 0 – 15 years	41,351	41,810	+1.1%

Source: Welsh Government 2015

Fundamentally – the population of older children is forecast – by the Welsh Government to increase at a greater rate than the population young[er] children.

- 3.16 The Welsh Index of Multiple Deprivation (WIMD) 2011: Child Index, is the official measure of relative deprivation for super output areas in Wales for children. It was published by the Welsh Government's Statistical Directorate in August 2011. The table below indicates the wards where the top 10 Lower Super Output Areas (LSOAs)³ in Swansea were located in terms of (a) the overall Child Index and (b) the Education Deprivation indicator as of 2011.

Swansea Rank	Child Index 2011	Education Deprivation
1	Townhill[']s SOA [rank] 1 ⁴	Penderry [ward] SOA 1
2	Townhill SOA 3	Townhill SOA 1
3	Penderry SOA 1	Townhill SOA 3
4	Townhill SOA 2	Penderry SOA 7
5	Bonymaen SOA 1	Townhill SOA 6
6	Penderry SOA 3	Townhill SOA 5
7	Mynyddbach SOA 1	Mynyddbach SOA 1
8	Castle SOA 8	Penderry SOA 5
9	Penderry SOA 4	Penderry SOA 3
10	Morrison SOA 7	Castle SOA 2

³ Lower Layer SOAs were built using 2001 Census data from groups of Output Areas (typically four to six) and have been updated following the 2011 Census. They have an average of roughly 1,500 residents and 650 households.

⁴ i.e. the Townhill ward's most deprived Super Output Area.

3.17 A number of **new housing developments** are set to take place during the period up to 2020 throughout the Swansea locality. The Table below demonstrates how these may directly cause further pressure on (localised) childcare provision.

Ward	Number of ongoing/soon to be completed <i>new housing development dwellings</i> in ward – during period 2017 to 2021	Potential new childcare places required for (newly resident) 2, 3 and 4 years – using a yield formula of 0.31 [primary school equivalent] places per relevant residential unit X3 [year groups]
Bishopstown	0	0
Bonymaen	1,001	93
Castle	498	46
Clydach	53	5
Cockett	398	37
Cwmbwrla	10	1
Dunvant	39	4
Fairwood	0	0
Gorseinon	275	25
Gower	0	0
Gowerton	0	0
Killay North	415	36
Killay South	0	0
Kingsbridge	217	20
Landore	215	20
Llangyfelach	146	13
Llansamlet	1,153	108
Lower Loughor	110	10
Mawr	15	1.5
Mayals	0	0
Morrison	119	11
Mynyddbach	49	5
Newton	15	1.5
Oystermouth	100	9
Penclawdd	0	0
Penderry	271	25
Penllergaer	250	23
Pennard	0	0
Penyrheol	377	35
Pontarddulais	371	34
St Thomas	670	62
Sketty	401	37
Townhill	134	12
Uplands	32	3
Upper Loughor	45	4
West Cross	35	3
Total	7,414	684 potential new places required for 2, 3 and 4 year olds

Source: [of column 1 and 2 data] City and County of Swansea 2016

Supply of Childcare – Places and Provision in 2016

- 3.18 The following section includes the key information on the number of registered places accessible via Swansea's formal childcare sector.

For the **2014** Childcare Sufficiency Assessment, the number of **full daycare providers** denoted was 35 and the number of places accessible at these providers was evidently 1,700.

In comparison...

The number of **full daycare providers operating in autumn 2016** was 36 and the number of places accessible at these providers was evidently (an increased) 1,811.

For the **2014** Childcare Sufficiency Assessment, the number of **sessional daycare providers** denoted was 33 and the number of places accessible at these providers was evidently 773.

In comparison...

The number of **sessional daycare providers operating in autumn 2016** was 37 and the number of places accessible at these providers was evidently (an increased) 932.

For the **2014** Childcare Sufficiency Assessment, the number of **out of school childcare providers** denoted was 28 and the number of places accessible at these providers was evidently 805.

In comparison...

The number of **out of school childcare providers operating in autumn 2016** was 27 and the number of places accessible at these providers was evidently (an increased) 899.

For the **2014** Childcare Sufficiency Assessment, the number of **holiday playschemes** denoted was 17 and the number of places accessible at these providers was evidently 537.

In comparison...

The number of **holiday playschemes operating in autumn 2016** was 14 and the number of places accessible at these providers was evidently 441.

Finally, for the 2014 Childcare Sufficiency Assessment, the number of **registered childminders denoted** was 134 and the number of places accessible with these individuals was evidently 703.

In comparison...

The number of **registered childminders operating in autumn 2016** was 111 and the number of places accessible with these individuals was evidently (an increased) 771.

3.19 Summary of key forms of formal registered⁵ childcare accessible throughout Swansea in autumn 2016 and a comparison to supply in 2014

Type of formal childcare	Number of registered providers 2014	Number of registered providers 2016	Number of registered places 2014	Number of registered places 2016	Change in number of Places
Full Daycare sector	35	36	1,700	1,811	+111
Sessional Daycare sector	33	37	773	932	+159
Registered Childminders	134	111	703	771	+68
Out of School Childcare sector	28	27	805	899	+94
Holiday Playschemes	17	14	537	441	-96
Total	247	225	4,518	4,954	+336

The table indicates that since spring 2014 there has been a net increase of 336 registered childcare places across the locality, particularly for the sessional daycare sector, which is attributable – in the main – to the continued growth of the Flying Start programme.

3.20 In autumn 2016 there were 79 Swansea-based primary schools funded to offer early years part-time education places. The three wards where the most frequent number of such schools were situated were:

- Morriston ward (6 primary schools) and the bordering...
- Llansamlet ward (5 primary schools)
- Cockett ward (5 primary schools)

The three wards where the most frequent number of such places were situated were (also):

- Morriston ward (221)
- Cockett ward (198)
- Llansamlet ward (190)

Across the Swansea locality there were a total of 382 places accessible to 3 year olds and total of 2,509 places accessible to 4 year olds. 68 of the schools offered English medium places and 11 of the schools offered Welsh medium places.

⁵ It should be noted that CSSIW amended registration criteria in 2016 to cover children up to the age of 12 years. This has contributed to the net increase in the capacity of childminders.

40% of the places accessible to 3 year olds were available in the morning and 60% of the places accessible to 3 year olds were available in the afternoon. In contrast, 65% of the places accessible to 4 year olds were available in the morning and 35% of the places accessible to 4 year olds were available in the afternoon.

- 3.21 In late 2016, 18 childcare settings provided Flying Start places across the Swansea locality. All 18 providers offered sessional Flying Start places. During the autumn 2016 term there was a maximum (Swansea-wide) capacity of 636 spaces, per day. 83% of parents with at least one two year old who were living in a Flying Start area were accessing such a free childcare place.

Supply of Childcare – Childcare Providers and Stakeholders feedback

3.22 The following section outlines key feedback that was received from the Swansea locality’s formal and informal childcare providers during the period August 2016 – November 2016. It incorporates the feedback from four complimentary surveys:

1. 2017 Swansea CSA Childcare Providers Survey
2. Swansea childcare providers’ contribution to the summer 2016 Self-Assessment of Service Statement (SASS) report/data gathering exercise
3. Autumn 2016 Cwlwm Wales-wide childcare workforce survey
4. 2017 Swansea CSA Survey with Primary Schools about on-site out of school childcare

3.23 With regard to the *main* language through which a childcare service is provided – the following was fed back by respondents to the 2017 CSA Childcare Providers Survey⁶:

Language(s) provision was delivered to	Early Years Childcare Providers: Full Daycare and Sessional Daycare - % who stated	Out of School Childcare Providers - % who stated	Registered Childminders - % who stated
Welsh medium	4%	12.5%	0%
Both Welsh and English Medium	6%	12.5%	6%
English Medium some use of Bilingual	77%	50%	52%
English Medium	10%	25%	41%
Any other languages ⁷	0	0	1%

3.24 The 2017 CSA Childcare Providers Survey demonstrated that:

In the full daycare sector the most frequent *weekday* opening time – of a core type of (term time) provision – was 7.30am and the most frequent finish time was 6.00pm. In the sessional daycare sector the most frequent *weekday* opening time – of a core type of (term time) provision – was 9.00am and the most frequent finish time was (a morning session, at) 11.30am.

⁶ 95% of the full daycare providers operating in autumn 2016 responded to this survey; 96% of the sessional daycare providers operating in autumn 2016 responded to this survey; 78% of the registered childminders operating in autumn 2016 responded to this survey; 100% of the out of school childcare providers operating in autumn 2016 responded to this survey.

⁷ Stated 'German'.

In the out of school daycare sector the most frequent *weekday* opening time – of a core type of (term time) provision – was 3.20pm and the most frequent finish time was 5.15pm. In Swansea’s childminding sector the most frequent *weekday* start time – of a core of (term time) provision – was 7.00am and the most frequent finish time was 6.00pm.

- 3.25 An outcome of the 2017 CSA Childcare Providers Survey was that the most frequent average hourly rate stated by full daycare providers was £3.50/hour. However, the average hourly rate stated by full daycare providers was £4.53/hour.

The most frequent hourly rate stated by sessional daycare providers was £0 – due to the incidence of sessional Flying Start funded places.

The most frequent hourly rate stated by out of school providers during term times was £2.50/hour – and the average hourly rate stated by out of school providers during term times was also £2.50/hour.

The most frequent hourly rate stated by out of school providers during holiday times was £3.00/hour – and the average hourly rate stated by out of school providers during holiday times was £1.63/hour.

The most frequent hourly rate stated by registered childminders was £4.00/hour – and the average hourly rate stated by registered childminders was £3.84/hour.

- 3.26 The 2017 CSA Childcare Providers Survey indicated that 27% of full daycare providers had kept a waiting list at some point during the previous 12 months, for their term-time provision. Waiting lists had evidently – on average – been at their highest during the 2016 spring term.

40% of sessional daycare providers stated that their setting had kept a waiting list at some point during the previous 12 months, for their term time provision. Waiting lists were evidently – on average – at their highest during the 2016 spring term.

(Only) 8% of registered childminders stated that their setting had kept a waiting list at some point during the previous 12 months, for their term time provision. (Any) waiting lists were evidently – on average – at their ‘highest’ during the 2016 autumn term.

21% of out of school providers stated that their setting had kept a waiting list at some point during the previous 12 months, for their term time provision. Waiting lists were evidently – on average – at their highest during the spring term. Additionally, none of out of school providers (or indeed any type of childcare provider) stated that their setting had kept a waiting list at some point during the previous 12 months, for their holiday time provision.

- 3.27 The 2017 CSA Childcare Providers Survey helped to determine the distances that children travel in order to attend a particular childcare provision during term time. The feedback demonstrated that children who were accessing (setting based) term-time and holiday time out of school childcare tended to travel

longer A – B distances (of between 3 miles – 10 miles) with a more notable frequency than children who were accessing a type of childcare for 0 – 4 year olds.

3.28 In terms of children with additional needs and/or disabilities, the 2017 CSA Childcare Providers Survey indicated Swansea’s full daycare sector is most frequently providing childcare to those with a speech and language or communication difficulty, followed in frequency by a specific learning difficulty (e.g. dyslexia, ADHD, dyspraxia).

In terms of children with additional needs and/or disabilities, the 2017 CSA Childcare Providers Survey indicated that Swansea’s sessional daycare sector is most frequently providing childcare to those (once again) with a speech and language or communication difficulty, followed in frequency by a specific learning difficulty (e.g. dyslexia, ADHD, dyspraxia).

In terms of children with additional needs and/or disabilities, the 2017 CSA Childcare Providers Survey indicated that Swansea’s registered childminders are most frequently providing childcare to those with a specific learning difficulty (e.g. dyslexia, ADHD, dyspraxia), followed in frequency by a visual impairment.

3.29 The 2017 CSA Childcare Providers Survey indicated that three most frequent forms of specific/targeted support requested by (responding) members of Swansea’s formal childcare sector were – in order of frequency:

- Advice/support for needs of children with special needs and disabilities (20% of all childcare providers)
- (Staff) training (20% of all childcare providers)
- Support with and advice on inspection and registration (11% of all childcare providers)

3.30 Encouragingly the 2017 CSA Childcare Providers Survey demonstrated the most frequent length of time that formal childcare providers and childminders who were operating across the Swansea locality expected to continue in operation was over 5 years.

Length of time	Early Years Childcare Sector: Full Daycare and Sessional Daycare	Registered Childminders	Out of School Childcare Providers
Less than 2 years	0	13%	4%
Up to 3 years	0	7%	0
Up to 4 years	0	1%	0
Up to 5 years	2%	13%	4%
Longer than 5 years	80%	54%	63%
Can't say	18%	12%	29%

However, it was observed that 1 : 5 of the locality’s responding registered childminders expected to be operating for less than 3 years from autumn 2016.

3.31 During the 2017 CSA Childcare Providers Survey feedback was received on the subject of how much higher or lower they expected demand for their childcare places to be *in two years time* – i.e. in autumn 2018.

Level of Demand	Early Years Childcare Sector: Full Daycare and Sessional Daycare	Registered Childminders	Out of School Childcare Providers
Significantly higher	8.5%	1%	8%
Higher – but not significantly	30%	20%	46%
About the same	46%	49%	38%
Lower – but not significantly	5.5%	12%	4%
Significantly lower	10%	18%	4%

The Table indicates that the locality’s out of school childcare sector was particularly expectant of an increase in demand for their provision over the forthcoming two years.

3.32 The table below indicates the extent to which (via the 2017 CSA Childcare Providers Survey) daycare providers and registered childminders considered that – from their perspective – there is sufficiency of specific types of childcare places (denoted in the first column) within *their immediate geographical area*.

Age groups of childcare places	Early Years Childcare Sector: Full Daycare and Sessional Daycare	Registered Childminders	Out of School Childcare Providers
Yes there is sufficiency of places for 0 – 2 year olds in our immediate geographical area	71%	81%	54%
No there is not sufficiency of places for 0 – 2 olds in our immediate geographical area	13%	17%	25%
Don't Know whether there is sufficiency of places for 0 – 2 year olds in our immediate geographical area	16%	2%	21%
Yes there is sufficiency of places for 3 and 4 year olds in our immediate geographical area	80%	83%	63%
No there is not sufficiency of places for 3 and 4 olds in our immediate geographical area	12%	13%	25%

Age groups of childcare places	Early Years Childcare Sector: Full Daycare and Sessional Daycare	Registered Childminders	Out of School Childcare Providers
Don't Know whether there is sufficiency of places for 3 and 4 year olds in our immediate geographical area	8%	4%	13%
Yes there is sufficiency of places for 5 - 14 year olds in our immediate geographical area	63%	70%	67%
No there is not sufficiency of places for 5 - 14 year olds in our immediate geographical area	20%	23%	21%
Don't Know whether there is sufficiency of places for 5 - 14 year olds in our immediate geographical area	17%	7%	13%
Yes there is sufficiency of places for children with SEN in our immediate geographical area	30%	27%	17%
No there is not sufficiency of places for children with SEN in our immediate geographical area	30%	18%	38%
Don't Know whether there is sufficiency of places for 2 children with SEN in our immediate geographical area	40%	54%	46%
Yes there is sufficiency of places for children with complex medical needs in our immediate geographical area	30%	28%	17%
No there is not sufficiency of places for children with complex medical needs in our immediate geographical area	30%	18%	38%
Don't Know whether there is sufficiency of places for children with complex medical needs in our immediate geographical area	40%	54%	46%

The table demonstrates that approximately three quarters of early years childcare providers believed that there was sufficient childcare places in their immediate geographic area for 0 – 2 year olds and 3 – 4 year olds. A slightly higher proportion of registered childminders held the same belief. Interestingly, it was observed that out of school childcare providers more frequently *perceived* that there was not sufficient provision for pre-school children.

3.33 Critically, all *responding* early years childcare providers and childminders were asked:

In theory if this provision was to extend by 20 hours would you consider offering, all or some of those hours, at your setting?

The table indicates the (frequency of) responses from the (a) full daycare and (b) sessional early years childcare providers to this question, aligned to each ward⁸.

Ward	Number of responding full daycare providers and sessional daycare providers	Yes All	Yes Some	No	Don't Know
Bishopstown	1	0	1	0	0
Bonymaen	1	0	0	1	0
Castle	4	1	0	2	1
Clydach	4	2	0	1	1
Cockett	3	1	1	0	1
Cwmbwrla	1	0	1	0	0
Dunvant	1	0	0	0	1
Gorseinon	4	2	1	0	1
Gowerton	2	1	0	1	0
Killay South	2	0	0	1	1
Landore	2	1	0	1	0
Llangyfelach	1	0	1	0	0
Llansamlet	6	2	2	0	2
Morrison	3	1	1	1	0
Mynyddbach	4	1	1	0	2
Oystermouth	2	2	0	0	0
Penclawdd	2	2	0	0	0
Penderry	4	0	1	3	0
Penllergaer	2	1	0	0	1
Pennard	1	0	0	0	1
Penyrheol	2	0	0	0	2
Pontarddulais	2	1	0	1	0
St Thomas	2	0	0	1	1
Sketty	3	1	0	0	2
Townhill	2	0	0	2	0
Uplands	5	3	1	0	1
West Cross	3	2	0	0	1
Total	69 (100%)	24 (35%)	11 (15%)	15 (22%)	19 (28%)

The table demonstrates that just over a third of full daycare and sessional daycare providers who responded to the 2017 CSA Providers Survey stated a definite intention to consider providing places which accounted for all of the additional free entitlement hours.

⁸ The responses from childminders is viewable in the full Swansea 2017 Childcare Sufficiency Assessment. Where a ward is not present this indicates that was 0 such provision in that locality.

All full daycare and sessional daycare providers were also invited to feedback the main issues that their setting would need to consider if, theoretically, they did provide all, or some, of the additional 20 hours. The two most frequent issues fed back by these childcare providers were (a) the amount of additional funding available (44% of such respondents), followed in frequency by (b) there would be capacity issues (27% of such respondents).

3.34 For the 2017 CSA, the City and County of Swansea undertook structured telephone interviews with the following members of the locality's informal/unregistered childcare family:

1. Approved Childcare Providers i.e. home childcarers and nannies⁹
2. Playschemes that are convened at Swansea locality-based Leisure Centres

Key feedback from Swansea-based informal/unregistered childcare providers included:

- 64% of such providers offered term-time provision and 90% offered provision during the school holidays
- The most frequent language-medium was English (64%), followed by English with some Welsh language element(s) (28%)
- For the Approved (home) Childcare Providers, the average hourly fee was £7.16. For the six-Leisure Centre-based (holiday) playschemes the average hourly fee was £1.84
- 35% of providers believed demand for their provision would be: higher - though not significantly over the next two years. None of the providers felt that demand would be: significantly lower
- Informal childcare providers were asked: how long they expected to continue to provide childcare. Most frequently (58%) stated that they were expecting to be providing childcare for longer than 5 years. (Only) 8% of applicable providers believed that they were expecting to be providing childcare for *no longer* than 3 years

⁹ Further details can be viewed at: <http://cssiw.org.uk/providingacareservice/nannies/?lang=en>

3.35 In autumn 2016, Cwlwm¹⁰ undertook a Wales-wide childcare workforce survey. The aim of the survey was to (a) develop an accurate and evidence-based picture of the current early years childcare landscape in Wales; (b) provide information on the levels of qualifications currently held by those in the sector (c) identify training needs and explore issues around access to training. Key feedback from Swansea-based childcare providers included:

- The most frequent age group of a childcare workforce member was (a female of) 31 – 40 years – almost one-quarter of the total workforce
- 16% of the workforce did not hold a childcare or playwork themed qualification (3% lower than the all of Wales figure)
- 50% of the workforce held a Level 3 Childcare qualification (2% more than the all of Wales figure)
- 6% of the workforce had graduated with a childcare themed qualification (again, 2% more than the all of Wales figure)
- 73% of respondents stated that their provision does not have a training budget
- 0 respondents stated that they would prefer any training to be delivered in Welsh only – however 12% stated that they would welcome bilingual Welsh and English training sessions/courses
- The three most frequent subjects that respondents would welcome (more) training to address were: 1. child protection and safeguarding (28%); 2. first aid (25%); food hygiene (22%)
- (Only) 2% of the childcare workforce was evidently male

3.36 62 primary schools and secondary schools located across the Swansea locality have provided the following feedback, with regard to the incidence of unregistered out of school childcare, including breakfast clubs (operating from their premises):

- 92% of representatives of (62 responding) schools in Swansea stated that they currently had at least one form of childcare operating at their site – most frequently a Welsh government funded breakfast club
- With regard to the question: *Do you believe the current childcare provision in Swansea is appropriate to meet the childcare needs of parents who attend your school?* – the following outcome was observed...

(Stated) Yes =42%

No = 28 29%

Don't Know = 30 29%

- 27% of representatives of primary schools stated that there was physical space in their school which could potentially be utilised for a new childcare provision

¹⁰ 'Cwlwm' brings together the five leading childcare organisations in Wales to deliver a bilingual integrated service that will ensure the best possible outcomes for children and families across Wales. 'Cwlwm' partners are Clybiau Plant Cymru Kids' Clubs, Mudiad Meithrin, National Day Nurseries Association (NDNA Cymru), PACEY Cymru and Wales Pre-School Providers Association (Wales PPA).

4. Emerging Gaps – Analysis

4.1 Geographical and Type gaps

Geographical gaps focus on locations that (might) experience particular gaps in provision – potentially in relation to parental preference.

Type gaps indicate where there is, or where there may be in the future, a shortage in the type of childcare for which parents and carers may be expressing a preference.

Given the potential overlap between these two gap categories, they have been addressed jointly in this section.

- 4.1.1 Those responsible for childcare sufficiency planning within the City and County of Swansea need to retain an awareness that two bordering wards in the east of the locality will account for a relatively high incidence of new housing developments during the forthcoming period – i.e. (a) Bonymaen ward and (b) Llansamlet ward – a ward which already has a relatively high population of children and young people.
- 4.1.2 The 2017 CSA Providers Survey suggested that 1 : 5 of the Swansea locality's registered childminders (approximately 20 childminders) did not expect to still be operating by autumn 2019. Two wards where this response was notably repeated were (a) Llansamlet and (b) Morriston – both wards where the populations are relatively high, and in the case of the former, where a relatively high incidence of new housing development is set to take place during the forthcoming period, which in turn *might* affect (i.e. increase) demand for formal childcare, including places with childminders.
- 4.1.3 The 2017 Swansea Childcare Sufficiency Assessment has demonstrated that no childcare provision is physically situated in[side] the Mawr ward, in the north of the locality. However: (a) it is logistically feasible that families resident in this (relatively rural) ward could commute/travel to neighbouring wards – some of which do have a relatively high number of childcare places, such as Morriston ward; (b) there was no sustained evidence that parents who were resident in the ward believed that this factor was a significant barrier to them accessing formal childcare; (c) both Craigcefnparc Primary School and Felindre Welsh Primary School are situated within the ward and both offer funded early years part-time education places.

- 4.1.4 2015 ONS ward population estimates indicate that the Townhill ward has a relatively high number of resident 3 and 4 year olds, i.e. 341. However in response to the question:

In theory if the free entitlement was to extend to incorporate 20 hours free childcare would you consider offering, all or some of those hours, at your setting?

Neither of the setting-based childcare providers within the ward answered 'yes – all' or 'yes – some'.

Similarly, the Penderry ward also has a relatively high number of resident 3 and 4 year olds, i.e. 432. However, in response to the same question, only one of the four setting-based childcare providers within the ward answered 'yes [– some]'.

It can also be noted that 1 : 5 of full daycare providers stated that they ideally needed to receive more information about the dynamics of the enhanced free entitlement and how it would be rolled out.

- 4.1.5 42% of full daycare and sessional daycare providers stated a key issue for them with regard to them being involved in the supply of the enhanced free entitlement hours would be eventual clarity on the funding that was available to them to help deliver such places. This concern was recurrently highlighted by such providers in the Llansamlet ward and the nearby Mynyddbach ward.
- 4.1.6 Those responsible for childcare sufficiency planning within the City and County of Swansea should retain an awareness that – through the 2017 CSA Childcare Providers Survey – there was a relatively high incidence of full daycare providers and sessional daycare providers located within the Townhill ward, believing that demand for their places would “*increase*” during the period autumn 2016 – autumn 2018. This finding could be considered aligned to the fact that the ward accounts for a relatively high number of resident 0 – 4 year olds. Additionally, with regard to the Townhill ward, 80% of all childcare providers operating within its boundary did not believe that – *in their opinion and experience* – there was sufficient out of school places for (the relatively high number of) the 5 – 15 year olds resident in the ward, in autumn 2016.
- 4.1.7 As stated in 4.1.4 (above) the Penderry ward has a relatively high number of resident 0 – 4 year olds. Aligned to this fact, those responsible for childcare sufficiency planning within the City and County of Swansea should retain an awareness that (a) over half of the (nine) childcare providers for that age group situated in the ward stated (as part of the 2017 CSA Childcare Providers Survey) that, *in their opinion*, there was not currently sufficient childcare places for this age group.
- 4.1.8 In terms of the Swansea-based locality as a whole, the autumn 2016, Cwlwm workforce survey demonstrated that 16% of the childcare workforce did not hold a childcare or playwork themed qualification.

4.2 Income gaps

This section focuses on areas where there is, or may be in forthcoming years, a potential shortage of affordable childcare.

4.2.1 Parents who were resident in the north of the locality and who were accessing at least one type of formal childcare tended to state 'agree' with the statement: *(registered) childcare is too expensive* with a higher frequency than parents who were resident in the south of the locality and who were also accessing at least one type of formal childcare.

4.2.2 Parents who were resident in the north of the locality and who were *not* accessing at least one type of formal childcare (i.e. non-users) also tended to state 'agree' with the statement: *(registered) childcare is too expensive* with a higher frequency than parents who were resident in the south of the locality and who were not accessing at least one type of formal childcare. For example in answer to the question: *Which of these reasons best describe why you do not use childcare for some or all of your children at this time?*

25% more parents resident in the SA5 (North Central Swansea locality) and SA6 (North Swansea locality) postcode areas stated: childcare is too expensive, in comparison to the SA2 (South Central locality) and SA3 (South West Swansea locality) postcode areas.

4.2.3 There was a relatively low incidence of parents reporting that they were accessing financial support through the childcare element of working tax credit and/or through the claiming of tax free childcare or assistance through the Employer supported scheme. This was (most) frequently due to ineligibility – however, approximately 10% of 'users' of formal childcare stated that they were unsure as to whether they were eligible for such form(s) of financial support

4.3 Specific Needs gaps

A specific needs gap analysis is carried out to determine whether there is a shortage of suitable places for children with special needs and disabilities or children with other specific needs or requirements – including those from particular faiths or community groups.

4.3.1 One-third of all childcare providers *did not* feel that there were sufficient childcare places *in their immediate geographical area* for children with special needs *and* children with complex medical needs – a statement that tended to particularly recur from childcare providers situated in the SA1 (South East Swansea locality) and SA2 (South Central Swansea locality) postcode areas.

4.3.2 48% of all parents responded via the 2017 CSA Parents Survey that they held an ambition for child(ren) to be bi-lingual in English and Welsh. Although there was some incidence of parents stating that they were not accessing formal childcare due to an absence of Welsh-medium provision or them being unable to locate such provision, such a problem was not evidently widespread. It is an

issue which childcare sufficiency planners may wish to monitor – especially with regard to the advent of the enhanced free entitlement.

- 4.3.3 20% (1 : 5) of the childcare providers who responded to the 2017 CSA Childcare Providers Survey stated that an issue they would welcome more advice and support with is supporting children with special needs and disabilities. Almost 40% of full daycare providers made this statement/request.

4.4 Time gaps

This section focuses on whether there is, or whether there may be in forthcoming years, a shortage of childcare at a time when parents would wish to use it.

- 4.4.1 30% of all respondents to the 2017 CSA Childcare Providers Survey stated that a specific trend that they have observed since 2014 was an increased demand for part-time *childcare*/hours.
- 4.4.2 The 2017 CSA Childcare Providers Survey indicated that waiting lists within Swansea's 0 – 4 years childcare sector tend to be at their highest for the Spring Term (entry)

4.5 Age gaps

This section examines whether there is a shortage of childcare suitable to meet the needs and requirements of a certain age group.

- 4.5.1 The 2017 CSA Parents Survey demonstrated that of those parents/carers who accessing at least one type of formal childcare – 45% were accessing a type of out of school childcare, including a holiday-time provision. Therefore, those responsible for childcare sufficiency planning within the City and County of Swansea should retain an awareness that the Welsh Government forecast an increase in the population of children aged 8 – 15 years over the period 2017 – 2020.
- 4.5.2 In order to maintain traction with the *estimated* 1.65% increase in the number of 8 – 15 year olds who will be resident in the Swansea locality by 2020, a corresponding increase of (approximately 40) out of school childcare places would ideally be required, *in order just to match the existing status quo*.
- 4.5.3 Those responsible for childcare sufficiency planning within the City and County of Swansea should retain an awareness that the population of resident 2 year olds is projected to increase (although not at a such a comparable rate as will be observed for older children). Mynyddbach is an example of a ward which already has a relatively high number of two year olds.