Appendix A

Childcare Sufficiency Assessment 2022

Swansea Council

Submitted 30th June 2022

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2022 Childcare Sufficiency Assessment
Executive Summary

Assessing Childcare Sufficiency

The 2022 Childcare Sufficiency Assessment (CSA) forms part of a Duty on local authorities to assess whether there are sufficient childcare opportunities to support working families within the area.

The assessment was primarily completed between 2021 and 2022, with additional data accumulated outside that period.

While it is primarily intended to assess whether there is sufficient childcare provision to suit the needs of working parents, it considers barriers to access, workforce development, quality and how parents/carers access information on available care.

The Process

The assessment comprised a combination of desk research, stakeholder surveys and engagement and the findings of a range of on-line surveys developed by the local authority and Welsh Government.

The assessment was undertaken between July 2021 and June 2022, ahead of submission to Welsh Government in September 2022. Due to the length of time it was ‘live’ there were inevitably changes and developments mid-assessment that had to be considered.

Significantly, the 2022 CSA has been compiled at a time of major change and uncertainty. The Covid-19 Pandemic above all else has massively impacted findings, views and data. Additionally, developments such as a commitment to extend the Flying Start Offer to include two year olds were emerging at the time of assessment which meant that the overall position identified may well change considerably in the near future.

As a result, much of the findings and recommendations are heavily caveated as being reflective of the current situation. Most identified actions will include the requirement to identify suitability over the coming year.

Despite this, the research and analysis formed during the assessment provide a vital position statement of childcare across Swansea to help advise planning and policy.

Findings

Findings came in both quantifiable form, i.e. 'is there enough provision to meet demand?', and qualitative, i.e. is it of the required standard, can it be accessed and how are the workforce feeling?

They were grouped based on the identified themes of the CSA, such as supply, demand, barriers to childcare, population, etc. It is recommended that the full CSA be referred to for an overall picture of findings, but most notable findings were;

- **Overall, there appears to be sufficient childcare,** based on attendance, waiting lists, vacancies and consultation responses. However, this is impacted by the Covid-19 pandemic and there are certain barriers that remain. This is a consistent view across areas and childcare types.
  Each area of Swansea (ward) was considered in terms of provision available within it, as well as considering neighbouring areas where it is felt reasonable to expect that families could travel. Areas such as Gower and Mawr had a perceived deficiency although previously this has been considered and a low amount of provision is not reflected in feedback from families living in these areas that childcare is hard to access. This will need further consideration.

- **Cost of childcare is a barrier** and the primary barrier to access for families with many feeling it is not a viable option. Several responses noted that comparative costs against income from employment meant they were unable to continue to work.

- **Take-up of tax-free childcare** is low by comparison which adds to the issue.

- **Swansea is an area of diverse needs** – with a marked difference between the most and least affluent, those with easy access to provision and those in rural communities having to travel to childcare. This can make planning for childcare problematic, as well as impacting upon the sustainability of settings operating in areas of need.

- **Most families' desire pre-childcare doesn't translate into reality** – with a much higher number intending to access formal childcare, often bilingually, than end up taking this up. The comparative data from families prior to their child requiring childcare presents a marked difference. This needs further consideration.

- **The quality of formal childcare** is high according to most of those consulted. Feedback from parent/carers was consistent that they were pleased with the service that they received.

- **Financial sustainability is a concern for settings,** despite considerable additional funding in response to Covid. Many settings stated that they were unsure if they would continue to be operating over the next 1 to 2 years. Whilst there is inevitable turnover of providers, particularly childminders, this figure was notably high. Additionally, there needs to be consideration of the impact of the additional funding in response to Covid and what the impact will be once this comes to an end.

- **Settings are struggling to find staff,** with many vacancies remaining open for some time and the sector feeling undervalued as well as believing the profession warrants higher pay to justify the responsibility involved. It has been a difficult time for all, yet the sector has provided a key role in supporting children whilst earning comparatively low pay in return.

- **The proposed expansion of Flying Start will have a considerable impact** although how exactly is to be confirmed at the current time. This is something that will need to be a particular area of focus over the coming months.

Recommendations

A comprehensive set of recommendations and associated actions can be found within the full report however key recommendations include;

- **Increase the take-up of tax-free childcare,** through engagement, awareness and support for settings
- **Support those in greatest need,** such as those on lower incomes, or with specific need barriers to access childcare such as additional learning needs (noting that processes currently exist to offer this support)
- **Undertake additional research** that delves deeper into perceived areas of concern such as why intentions for childcare do not always materialise, or areas with a potential shortage in childcare. The CSA has identified many potential gaps but we will only know for sure if we look further into them.
- **Support the childcare workforce** through access to training**,** guidance and Continued Professional Development (CPD). The local childcare sector plays a vital role and needs to feel supported to maintain this and to develop.
- **Promote childcare as a career,** to ensure settings are not short of staff and childcare is seen as a reputable career with a salary to match. Settings are struggling to recruit and need to feel there are high quality candidates available.
- **Continued sustainability support** for the sector including grant funding and business health checks that will allow them and us to measure how they are doing and if more assistance is required.
- **Plan for the development of the Flying Start Offer**, by considering likely implications, planning with key stakeholders and putting steps in place

How Achieved

These recommendations will best be achieved by having clear accountable actions detailing responsibility and resources. There needs to be ownership of these actions and a commitment to collaborative working from internal and external partners.

Additionally, the CSA and its recommendations should advise all relevant planning, policy and funding to support its implementation. This will be achieved by ensuring CSA actions mirror or are reflected in other relevant plans and vice-versa.

The CSA includes an annual action plan which details progress towards meeting the identified actions. For each action, a timescale is set with a view to all actions being achieved by submission of the next assessment in 2025.

This action plan will be monitored by identified officers who must report annually to Welsh Government on progress made and any shortfalls in achieving sufficient childcare.

Ultimately, the CSA is an evolving document and the process for assessment will continue over the next five years, including ensuring all stakeholders, not least Swansea's parents / carers are engaged and continue to have the opportunity to feed into it.

1. Introduction / Context

1.1 Duty To Assess Childcare Sufficiency

1.1.1 The Childcare Act 2006 (the 2006 Act) places a duty on all Welsh local authorities to undertake a Childcare Sufficiency Assessment (CSA).

The CSA evidences how local authorities discharge their duty to:

•ensure sufficient childcare is available

•undertake childcare sufficiency assessments; and

• provide information, advice and assistance relating to childcare to parents, prospective parents and those with parental responsibility or care of a child.

1.1.2 The Law

1.1.2.1 The Childcare Act 2006 (the 2006 Act) expands and clarifies in legislation the vital role local authorities play as strategic leaders in the provision of childcare locally. The 2006 Act reinforces the framework within which local authorities already work – in partnership with the private, voluntary, independent, community and maintained sector –to shape and secure children's services and focuses in particular on the provision of:

•sufficient, sustainable and flexible childcare that is responsive to parents' needs;

• information, advice and assistance relating to childcare to parents, prospective parents and those with parental responsibility or care of a child,

1.2 The local authority has the responsibility and lead role in coordinating effort across services, enabling different organisations, such as childcare providers from all sectors, Jobcentre Plus, community focused schools, integrated centres and local health services, to work together to secure sufficient high quality, sustainable provision that is responsive to the needs of children and their families.

1.3 Section 22 of the 2006 Act places a duty on local authorities to secure, as far as is reasonably practicable, provision of childcare[1] that is sufficient to meet the requirements of parents 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.

It is not the intention to oblige local authorities to meet the individual childcare needs of every working family, but to ensure that at a community level, the local authority is taking strategic action with its partners to address gaps in childcare. Local authorities will be expected to support the development of childcare where there is sufficient parental demand that a childcare provider could operate and be sustainable. Examples of how they could address gaps include:

- providing training and business support to childcare providers, to help providers run efficiently;
- providing market information to providers;
- supporting networks of and links between providers;
- working with partner and umbrella organisations to create targeted incentives to address any gaps in the market.

1.4 The powers of a local authority in relation to the provision of childcare are set out under section 23 of the 2006 Act. Sections 24 and 25 set out the arrangements between the local authority and childcare providers and the charges where a local authority provides childcare.

1.5 Regulations made by the Welsh Ministers under section 26 of the Act[2], require local authorities to undertake childcare sufficiency assessments for their area. The Regulations prescribe the process and planning cycle, the consultation and publication requirements, including details of the information which must be captured in the assessment. This is a necessary step to securing sufficient provision, enabling local authorities to identify gaps and establish plans to meet the needs of parents.

1.6 Local authorities have a corresponding duty to review the sufficiency of childcare provision for their area (to include excepted provision and Nannies approved under the Welsh Government voluntary scheme), and provide information about the provision of childcare in their area under section 118A of the School Standards and Framework Act 1998.

1.7 The duty on local authorities under section 27 of the 2006 Act to provide information, advice and assistance to parents is a vital aspect of achieving an effective childcare market where parents are able to articulate their needs and access support and provision easily. Regulations made by the Welsh Ministers under section 27, set out the categories of information local authorities must provide.

1.2 Section 22 - Duty to secure sufficient childcare for working parents

2.6 The 2006 Act requires local authorities to ensure, so far as is reasonably practicable, sufficient childcare to meet local needs of parents, (albeit for working parents or parents undertaking education or training) to assist them to obtain work.

This guidance aims to assist each local authority discharge its duty to secure sufficient childcare to meet the needs of its area. In determining whether the provision of childcare is sufficient the local authority must have regard to the needs of parents in their area for:

- the provision of childcare in respect of which the child care element of working tax credit or universal credit is payable;

- the provision of childcare in respect of which employer supported childcare or tax free childcare is payable;

- the provision of childcare for children who have special educational needs or require specialist care due to disability;
- the provision of childcare involving the use of the Welsh language.
- the provision of childcare which enables them to access their foundation phase early education entitlement
- the provision of childcare which enables them to access their entitlement for free childcare places

Section 26 – Duty on local authorities to assess childcare provision

2.13 The Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016, made under section 26 of the 2006 Act, requires local authorities to prepare assessments of the sufficiency of childcare provision (Childcare Sufficiency Assessment) in their area and to keep these under review.

What is a Childcare Sufficiency Assessment?

2.14 A Local authority Childcare Sufficiency Assessment must measure the nature and extent of the need for, and supply of, childcare in the area. Through this analysis, local authorities and their partners will be able to identify gaps in childcare provision where parents' needs are not being met and will allow local authorities to plan how to support the market to address the gaps identified.

2.15 A Childcare Sufficiency Assessment must include an Action Plan. Under the duty to secure sufficient childcare provision, local authorities should work with partners to develop and implement the Childcare Sufficiency Action Plan, that remove shortcomings and maintain the strengths identified in the Childcare Sufficiency Assessments. The Childcare Sufficiency Assessment Action Plan 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.

Timetable for the completion of the Childcare Sufficiency

Assessment, Action Plan and reporting arrangements

2.16 Local authorities must complete Childcare Sufficiency Assessments every 5 years, as set out in the regulations. Local authorities are required to complete and submit a copy of the following documents to Welsh Ministers:

1. **Childcare Sufficiency Assessment** – This must be a full assessment of the sufficiency of childcare provision in the local authority area.

2. **Action Plan** – This must detail the actions, priorities and milestones to maintain strengths and address shortcomings identified in the Childcare Sufficiency Assessment.

3. **Progress Report** – The progress report must detail the progress which has been made against the actions, priorities and milestones in the action plan including any significant issues or changes which have happened over the year which have impacted on or have influenced the childcare market in any way e.g. employment development, housing development. In particular, local authorities will need to liaise with Family Information Services and the Care Inspectorate for Wales (CIW) to ensure there is an up to date picture of childcare supply and demand. Local authorities will also be required to review and update the action plan if any changes need to be made for the following year.

Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016, 003/21

1.2 Methodology

1.2.1 Previous Assessments have been undertaken by commissioning Swansea University (2013) and CODA (2017). For the 2022 Assessment, Swansea's Childcare & Play Sufficiency Manager led, reporting to the Early Years Programmes Lead Officer.

1.2.2 It is agreed from the outset that the advantage of completing the assessment in-house and therefore retaining all knowledge gained outweighed the benefit of commissioning a third party.

1.2.3 With the additional responsibility of undertaking the Play Sufficiency Assessment (PSA) concurrently with the CSA, it was agreed to create a Sufficiency Assessment Support Officer post to aid completion.

1.2.4 The CSA follows a predominantly set structure, based around the statutory guidance, with scope for individual approaches to layout. There are templates for use with surveys and, for the first time, Welsh Government led on developing and recording a parental survey.

1.2.4.1 The specific layout of the 2022 CSA was developed with accessibility and accountability in mind. It was intended that, what can often be a data / table-heavy document with key findings contained with body text, would be something that could be relatively reader friendly and meaningful. The following guiding principles were at the centre;

- *Structured and flowing*
- *For each section; what is required, approach used, findings and recommended actions*
- *Key findings highlighted*
- *Accountable and SMART responses to shortfalls.*
- ***Ultimately, a document that is fit for purpose and will effectively advise childcare development until 2027.***

1.2.5 Locally, the Childcare & Play Sufficiency Manager (CPSM) and Sufficiency Assessment Support Officer (SASO) worked to an action plan for completion, reporting regularly to the Early Years Programmes Lead Officer (EYPLO).

1.2.6 A series of focus groups were provided to look at specific CSA-related topics. Some of these were set in advance but, notably, others were put in place in response to an emerging gap or issue, e.g. financial or needs-based barriers to provision.

1.2.7 A key consideration in developing the assessment was in identifying the most relevant source of statistical data that was used. Utilising findings from data capture that occurred too far in the past will have limited, potentially incorrect, results, while the most current data may not be available in sufficient time to analyse.

1.2.7.1 The most pertinent example of this is with the **2021 National Census** information. This data will inevitably be a major contributor to determining both sufficiency and need, yet it was apparent that the timing of the release of data would not map perfectly with assessment completion.

1.2.7.2 Following discussions with the Research & Information Team, once it was apparent that the bulk of Census data wouldn’t be available until April 2022, it was agreed that the CSA would utilise most recent Census data, notably 2020 mid-year estimates to provide data.

1.2.7.3 Given these considerations, as well as the ever-changing climate for childcare within Wales, it is recognised that there needs to be a ‘line in the sand’ for this assessment, with action plan development occurring in March 2022, well ahead of submission in September. Therefore, developments after that date can only be referred to in passing. This reflects the need to monitor the CSA on an ongoing basis.

1.2.7.4 Many of these considerations were shared across each Welsh authority and, as such, there were lengthy discussions as to whether the CSA deadline should be extend to allow for issues such as the Covid-19 Pandemic and the release of 2021 Census data.

1.2.9 It was also decided to include a summary of actions from the 2017 CSA and an outline indication of what progress had been made to achieve them. This will need to be a continual theme, evidencing how the CSA findings make a meaningful difference.

1.2.9 Early draft feedback sessions were provided for key stakeholders to hear initial findings in February 2022. After this point, final additions and amendments were made ahead of action planning during March and April 2022.

1.3 Considerations for Use

1.3.1 This document is intended to provide full in-depth data and analysis on each of the components set out in the standards.

1.3.2 An executive summary has been produced which includes key findings, analysis and recommended actions. This document can best be used as a set of appendices to the executive summary.

1.3.3 Note that it will not always be possible, or appropriate, to draw out one set of findings within this assessment to be used to form a conclusion. Often one finding, e.g. a perceived lack of provision in one area, will be countered by a subsequent view that families in that area feel they have sufficient access to childcare.

1.3.3.1 Where it is felt that particular findings may be contradicted by additional data, this will be referenced, wherever possible.

1.3.3.2 As the Assessment responds to quantifiable data, it is worth noting that the ever-changing status of settings means that figures are accurate as of the date stated. As a result, certain figures, e.g. number of registered settings of a certain type, will differ during the time that the assessment was 'live', so contrasting figures may appear.

1.3.4 Where information is 'factual', the source of the information, including any considerations for validity such as how long ago it was gathered, will be referenced. In some instances it will be considered appropriate to make assumptions where they provide additional context or evaluation. Where an assumption is made it will be stated as such, as well as how the assumption can be made and how it is beneficial to the assessment to make this assumption.

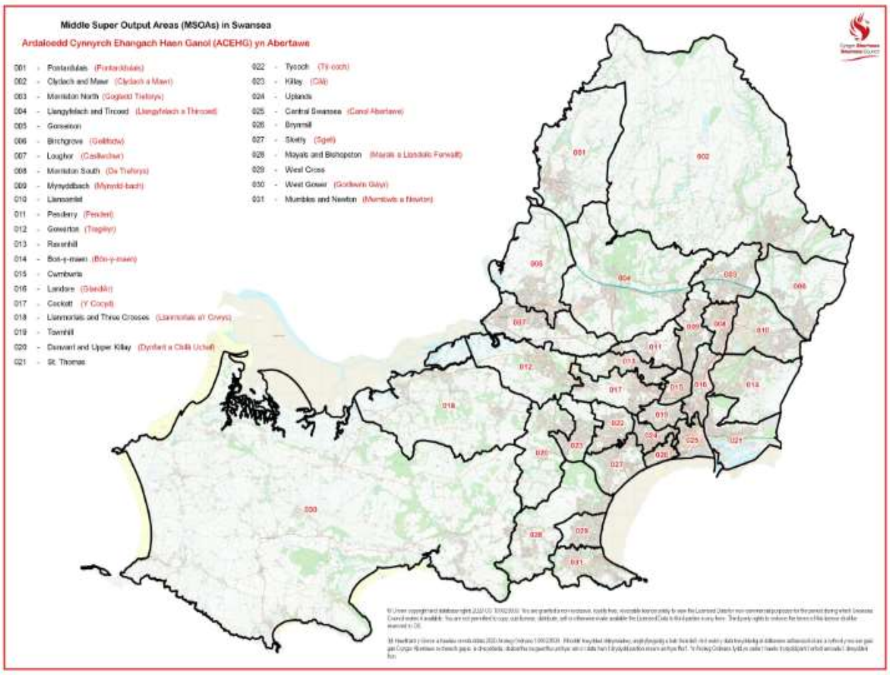
1.3.5 As noted, the CSA was due for submission by 30th September 2022, but the requirement for consultation and approval, as well as the preference for ensuring key partners have targets to work to as soon as possible, meant that the majority of findings were made by 31st March 2022. This means that some recommendations and assessments were made by this date even when additional information would have been available prior to 30th September 2022.

1.3.6 It is intended that the 2022 CSA is a document that is fit for purpose in terms of both providing and evaluating the necessary information to assess sufficiency, but also to be as user friendly as possible by drawing out key findings and considerations.

1.4 About Swansea

1.4.1 In developing an assessment, it is firstly, necessary to provide an overview of Swansea as an area, both geographically and demographically.

The City and County of Swansea covers an area of 379.7 square kilometres (146.6 square miles), almost 2% of the land area of Wales.



The county extends from Rhossili Down at the western edge of the Gower Peninsula to Kilvey Hill, Crymlyn Bog and the slopes of the Drummau Mountain on the eastern border with Neath Port Talbot; and from Mumbles Head and the sweep of Swansea Bay in the south to the ridge of Mynydd y Gwair overlooking the Amman Valley in the north.

Some two-thirds of the county's boundary is with the sea - the Burry Inlet, Bristol Channel and Swansea Bay. The River Loughor forms the north-west boundary with Carmarthenshire while the boundary to the north and east is largely defined by hill and valley features.

The main area of upland lies in the north of the county making up most of the community of Mawr. The highest point at 374 metres (1215 feet) occurs at Penlle'r Castell on the county's northern border. Areas of high land up to 185 metres (600 feet) range across the south of the county and form the hills of Kilvey, Townhill and Llwynmawr, separating the centre of Swansea from its northern suburbs. Further west, a ridge of high land, Cefn Bryn, forms the spine of Gower with Rhossili and Hardings Downs and Llanmadoc Hill forming major features over 600 feet high.

The chief river is the Tawe which enters the county at Clydach and flows through Morriston and the Lower Swansea Valley, before emerging to the east of the city centre and entering Swansea Bay over the barrage which separates the Docks and the Maritime Quarter. There are few other rivers of significant size, apart from the River Loughor and its tributaries - the Lliw and Llan in the north-west of the county.

The City and County of Swansea can be broadly divided into four physical areas: the open moorlands of the Lliw Uplands in the north; the rural Gower Peninsula in the west, containing a number of rural villages, contrasting coasts and the Gower Area of Outstanding Natural Beauty (AONB); the suburban area stretching from the edge of Swansea towards settlements in the west and around the M4 corridor; and the coastal strip around Swansea

Bay, no more than two miles in width, which includes the city centre and adjacent district centres.

The urban area of the county is chiefly focused on Swansea and radiates to the west and north of the city centre - around Swansea Bay to Mumbles; over Townhill to Cwmbwrla, Treboeth, Fforestfach and Penlan; through Uplands, Sketty, Killay and Dunvant; along the Swansea Valley communities of Hafod, Landore, Plasmarl, Morriston to Clydach; and on the east side of the River from St. Thomas to Bonymaen, Llansamlet and Birchgrove.

The second urban focus centres on the small towns of Gorseinon and Loughor in the north-west of the county, together with the nearby communities of Gowerton, Penllergaer, Llangyfelach and Pontarddulais.

Official rural-urban classification statistics suggest that approximately 69.5% of the county's land area is rural and 30.5% urban, although 88% of Swansea residents live in areas classified as urban and only 12% in rural areas (2011 Census estimates).

1.4.2 Headline Statistics

- **Swansea** is the second largest city in Wales and the regional commercial centre for South West Wales.
- **Land area**: 379.7 sq. kilometres - approximately 69.5% rural and 30.5% urban. [1]
- **Population**: 246,600 (mid-2020 estimate) - the second largest unitary authority in Wales - with a population density of 653 people per sq. km. (Wales: 153). [2]
- **Population change**: Official estimates suggest that Swansea's population increased by 9,300 between 2010 and 2020 - an average annual growth of 0.4%. [3]
- **Population projections**: The total population of Swansea is currently projected to increase to 254,400 by 2028, an estimated increase of 7,900 people (+3.2%) over a ten-year period. [4]
- **Births and Deaths**: There were 2,255 babies born in Swansea in 2019, and 2,510 deaths registered in the year. [5]
- **Life expectancy** at birth in Swansea now stands at 77.7 years for males (Wales 77.9) and 82.5 for females (Wales 82.0); with healthy life expectancy 62.5 years for males and 60.2 years for females. [6]
- **Housing**: Swansea contains around 112,100 dwellings (March 2020), with 65.5% (73,400) of all stock owner-occupied; 21,300 (19.0%) social rented and 17,400 (15.5%) private rented. [7]
- **Households**: 109,500 households live in Swansea (mid-2019), increasing by 8,000 (+7.8%) over the previous ten years, with a current average household size of 2.21 people (Wales 2.26). [8]
- **Swansea Council** consists of 36 Electoral Wards, represented by 72 local Councillors. [9]
- **Schools**: There are 93 local authority maintained schools in Swansea (January 2020) including 77 primary schools and 14 secondary schools. 12 schools are Welsh medium. [10]
- **Pupils**: Swansea schools contain 35,742 pupils (all ages), with 28,622 aged 5-15 (January 2020). [10]
- **Higher and Further Education**: Swansea is home to campus centres for Swansea University, University of Wales Trinity St. David and Gower College Swansea, which together support around 26,000 full-time students (2019-20).[11]
- **Qualifications**: 62.6% of Swansea's residents aged 16-64 are qualified to NVQ levels 3 and 4 (2020) - Wales 58.5%. [12]

- **Welsh language**: In 2011, 11.4% of people in Swansea aged three and over were able to speak Welsh. [13]
- **Ethnicity**: Swansea had a minority ethnic group (non-White) population of around 14,300 in 2011 - 6.0% of the total population. [13]
- **Country of birth**: In 2011, 78% of Swansea's population were born in Wales, with 17,200 (7.2%) residents born outside the UK. [13]
- **Economic output**: GVA (Gross Value Added) per head in Swansea stands at £21,912 (2018); 5.7% above the Wales level but 27.2% below the UK average. [14]
- **Economic activity**: 75.4% of Swansea's working age (16-64) residents are economically active, with 112,500 in employment (71.5% of working age) (year to December 2020). [15]
- **Employment**: 111,800 people work in Swansea, mostly (88.4%) in the service sectors, with 28.2% (31,500) employed in the public sector (2019). An estimated 33,400 people commute into Swansea each day (2020).[16]
- **Businesses**: There were 7,780 active businesses in Swansea in 2019, with 1,290 recorded business 'births' and 845 'deaths' in the year. [17]
- **Earnings**: Average (median) earnings for full-time employees in Swansea stand at £538.00 per week and £27,480 per year (April 2020). [18]
- **Unemployment**: 5,000 people in Swansea (4.3% of the economically active population aged 16+) are unemployed (survey period ending December 2020). The administrative claimant count (June 2021) was 7,830 (5.0% of working age residents). [19]
- **Deprivation**: The Welsh Index of Multiple Deprivation (WIMD) 2019 identified 11.5% of Swansea's local areas as falling within the top 10% most deprived in Wales. [20]
- **House Prices**: In February 2021, the average house sale price in Swansea was £169,324 - average for Wales £179,861. [21]

1. Rural Urban Classification (2011) of Output Areas in England and Wales, Office for National Statistics (ONS). Further information is available at www.swansea.gov.uk/geography
2. Mid-year estimates of population 2020, ONS. Further statistics, including population by age, available at www.swansea.gov.uk/population
3. ONS mid-year population estimates, 2010-20. Further information at www.swansea.gov.uk/populationtrends
4. Welsh Government (WG) sub-national population projections (2018-based). Further information at www.swansea.gov.uk/projections
5. Birth and death registrations summary tables 2019, ONS.
6. Health state life expectancy statistics, 2017-19, ONS.
7. Dwelling stock estimates March 2020, WG statistics.
8. Mid-year household estimates 2019, WG - see www.swansea.gov.uk/householdestimates
9. Further information and statistics about Swansea's wards is available at www.swansea.gov.uk/wardprofiles
10. Pupil Level Annual School Census (PLASC), January 2020. WG statistics (published July 2020).
11. Higher and Further Education Statistics 2019-20, WG (published January and February 2021).
12. Annual Population Survey (APS) estimates 2020, ONS. Further information included in the *Swansea Economic Profile* available at www.swansea.gov.uk/economicprofile
13. 2011 Census, ONS. Census statistics are available at www.swansea.gov.uk/2011censusswansea
14. Regional GVA (Gross Value Added) statistics 2018, ONS.
15. APS estimates for survey period ending December 2020, ONS.
16. a) Business Register and Employment Survey (BRES) workplace-based estimates 2019, ONS. b) Commuting tables 2020, published by WG using APS estimates.
17. Business demography statistics 2019, ONS.
18. Annual Survey of Hours and Earnings (ASHE) April 2020, ONS.
19. Labour Market Statistics, ONS. *Note: further information on items 14-19 available at* www.swansea.gov.uk/economicprofile
20. Welsh Index of Multiple Deprivation (WIMD) 2019, WG. Further information and local data available at www.swansea.gov.uk/wimd2019
21. Land Registry House Price Index (HPI) February 2021, ONS. Further statistics on house prices and sales at www.swansea.gov.uk/economicprofile

1.5 Overview of Childcare in Swansea

1.4.1 Swansea is an area in which childcare provision and its considerations in terms of support for working parents and as a key developmental tool for children is well established.

1.5.2 The many childcare settings offering a range of care are supported by the local authority primarily via the Early Years Programmes Team. Located within this team are the Family Information Service, coordination of Flying Start, administration of grant funding to the sector, Childcare Offer co-ordination and responsibility for undertaking and implementing each Childcare Sufficiency Assessment.

1.4.3 The umbrella organisations – Clybiau Plant Cymru Kids Club, Early Years Wales, Mudiad Meithrin and Pacey Cymru, are traditionally engaged to undertake development work in support of their member settings and to achieve childcare sufficiency, with additional input from the National Day Nurseries Association (NDNA).

1.6 Strategic Approach to Childcare in Swansea

1.5.1 Responsibility for childcare sufficiency lies with the Partnerships & Commissioning Service.

1.5.2 The Childcare Sufficiency Assessment provides the focal point for childcare planning and delivery, given that it identifies level of need, as well as any shortfalls or areas for development.

1.5.3 Whilst responsibility for the assessment and implementation of each CSA lies with the Early Years Programmes Team via the Childcare & Play Sufficiency Manager, it is recognised that a coordinated approach is essential. As such, a Childcare Sufficiency Working Group was developed in 2019 to look at key CSA actions collaboratively.

1.5.3.1 Additionally, the umbrella organisations, who support the local authority via development officer work, follow targets which specifically relate to the 2017 CSA Action Plan.

1.5.4 At the present time, a review of early years support services has identified the potential impact of an ‘early years front door’.

1.5.5 Each of the components of early years planning and development is linked via the overall Early Years Service Improvement Plan.

1.5.6 The Childcare Sufficiency Assessment is intended to pull together all elements of planning and delivery for childcare locally. As such, it’s findings and recommendations need to be effectively incorporated into policy and, perhaps more significantly, criteria for local grant funding.

1.5.7 It is important to recognise the impact and contribution of childcare on other local strategy and policy. This is explored in more detail in section **12.4** with contribution to poverty, education, wellbeing and play as particular areas where childcare can evidence a clear impact.

1.6 Progression from 2017 to 2022

1.6.1 To ensure each Assessment is meaningful, it is important to reflect on the findings of the previous assessment in 2017, what key actions were identified, what has been done to address them and ultimately what difference this has made – noting which of the latter will only be established within the findings themselves.

1.6.2 The 2017 CSA featured a 34 page action plan detailing all required actions. This is perhaps too unwieldy to include meaningfully, therefore those actions considered particularly key are detailed below;

Key Finding	Proposed Action	Progress	Impact
The population of resident 2 year olds is projected to increase over the life time of this CSA	Maintenance of Flying Start provision is critical as its funded nature allows positive attendance for children aged from 2½ years in the areas in which it is available.	Ongoing delivery of Flying Start programme.	Ensure sufficient childcare to respond to increase in under 2's
Should retain an awareness about the possible requirement to (help to) target future provision and support within south-west Swansea	Umbrella orgs devt. officers to consider developments within SA3 area	Support given to developing a number of school-based settings within SA3 area	Increased provision within identified area
A notably (higher than average) incidence of full daycare and sessional daycare providers within Townhill ward stating that demand for places would increase during the period autumn 2016 – autumn 2018	Continuation of the Flying Start programme. Continuation of commissioning development work with key childcare organisations, to achieve sufficiency and gradual increase of childcare places.	Continued Flying Start delivery in Townhill area Individual developments plus a coordinated approach	Affordable Childcare opportunities within identified area of need
it was observed that approximately 50% of (all) parents had an ambition for their children to be bilingual in Welsh and English.	Continued monitoring of demand for Welsh-medium provision especially with regard to the advent of the enhanced free entitlement.	Maintained as an ongoing target	Support towards offering medium choice for families
Consultation with children aged 5 years and over indicated that they particularly enjoy physical types of (free)	Work undertaken to reiterate to Swansea's childcare practitioners and professionals the benefits of outdoor play.	Range of developments, notably outdoor play training	Increased play opportunities enhancing the quality of delivery

play at a childcare provision – including play when being outdoors		offered, as well as an outdoor play grant	to meet children's needs
Parents were less likely to envisage themselves accessing a registered childminder.	Promotion of childminding as an option	Continue to engage PACEY Cymru and promote childminding via FIS	Increased awareness of childminding
Parents more frequently (since the 2014 CSA) seeking longer opening hours/times of availability	Ensure that this finding is communicated to all formal childcare providers located across the local authority area.	Communicated via LA and partners	Increased convenience for parents requiring it
Two bordering wards in east Swansea will account for a relatively high incidence of new housing developments during forthcoming period – Bonymaen and Llansamlet	Continued monitoring of population numbers and effects of new builds/dwellings in the Bonymaen and Llansamlet wards	Monitored via partner organisations	Development of additional provision in area will support increased need
Affordability remains an integral issue for a significant number of parents who would ideally like to take-up formal childcare. Two wards this was stated with a high frequency were: - Penderry - Townhill	FIS to have a (promoted) presence in the wards of Penderry and Townhill. Ensure robust delivery of 30 hours childcare pilot across various test options, feeding lessons learnt back to Welsh Government, to inform full programme roll out	Increased presence in identified areas 30 hours childcare rolled out across Swansea	Support towards costs of childcare for those who need it
The population of Swansea is likely to grow by 13.1% (31,200) people between 2011 and 2036.	Annual review of CSA Action Plan (including aligned to updates) thus ensuring that the C&CS is responsive to growing populations	CSA Action Plan is reviewed annually	New trends or needs are identified and responded to
Two wards which accounted for a *repeated* incidence of parents stating – via Parents Survey – childcare, at some point in the past, has not been available when I needed it were: Fairwood and Townhill	Potential ability to increase out of school places could be targeted at the Townhill ward, in response to further investigations into likely take-up.	Both areas prioritised by development workers	No additional opportunities were identified. No demand for provision in Fairwood identified
The population of older children in forthcoming years, is forecast to increase at a greater rate than population of young(er) children.	Potentially incentivise out of school childcare providers to extend opening hours – by means of sustainability grants.	Sustainability grants were made available to out of school providers	Support towards sustainability
Feedback from Parents Survey highlighted that children were more likely to attend a *school based* holiday club/ playscheme.	Incentivise existing after school clubs to extend their provision to also include holiday playscheme/club provision.	Identified as a target for development workers	Increased holiday offer from out of school providers
increased incidence of parental requests for part-time childcare, particularly	Maintenance of dialogue with childcare providers in order to further monitor "trends".	A consideration within all engagement to	No major gaps identified prior to 2022 CSA

within the early years childcare sector.		identify if a gap exists	
Tangible trend that parents are increasingly seeking more flexible hours and weekend childcare, particularly from childminders, to accommodate shift patterns	Ensure that this information is communicated to all childcare providers operating in Swansea.	Communicated to settings via LA and development officers	No major gaps identified prior to 2022 CSA
parents are (increasingly) seeking extended opening hours in terms of out of school childcare, both before and after school.	Ensure that this information is communicated to all childcare providers operating in Swansea.	Communicated to settings via LA and development officers	No major gaps identified prior to 2022 CSA
It was observed that 1 : 5 of existing childminders believed that they may no longer be working in the profession by 2020.	Revisit the current delivery model in respect of holistic childminder support and ongoing development. Continue to promote childminding as a career option amongst key Welsh medium organisations	Continued support for childminders through start-up grants and ongoing guidance	Ongoing support for and maintenance of sector
A number of schools situated in the SA3 (South West Swansea) area believed that – in their opinion – there was a tangible need for additional childcare provision locally	undertake an additional survey in the SA3/South West Swansea area in terms of investigating the potential need to develop further, localised, childcare provision.	Target for development officers to identify additional need in SA3	Some additional provision but ultimately no major gaps identified
It was noted that there has been a decline in the number of registered holiday care places available.	The realisation of a gradual but progressive increase to the baseline number of CIW registered sessional care operational during school holiday periods.	Target for development officers to look to increase holiday provision	Increase in number of settings offering holiday care
The Providers Survey reported that the out of school childcare sector had the greatest appetite to increase/ expand capacity.	Incentivise the out of school sector to extend availability via the grants programme.	Ensuring that out of school clubs can access CYP Fund and others to fund increased places	Creation of new out of school places to support additional places
The Providers Survey indicated that there was minimal provision of childminder places purely through the medium of Welsh.	Continue to promote childminding as a career option amongst key Welsh medium organisations	Promotion via FIS and networks	Remains as a priority
No formal childcare provision is physically located within the (relatively rural) Mawr ward	Continue to monitor whether geography is acting as a barrier to parents/carers who are resident in the Mawr ward	Ongoing assessment via LA and partners has not identified an unmet need	Remains as a consideration but low priority

Parents resident in the North and who were accessing at least one type of formal childcare tended to state 'agree' with the statement: *(registered) childcare is too expensive*	Outreach sessions and information opportunities to be delivered – about the subject of financial assistance towards paying for childcare	Outreach sessions put on to increase awareness	Likely to remain a priority
5% of parents stated via the 2017 CSA Parents Survey that they had experienced a barrier to accessing *localised* Welsh medium childcare provision.	A minimum of two further Cylchoedd Meithrin provisions to be established and registered with a particular focus on the wards of Mawr (or bordering), Llansamlet, Pennard and Kingsbridge.	Introduction of additional cylchoedd in identified areas	Increased opportunities for welsh medium childcare
16% of Swansea's childcare workforce did not hold a formal childcare/play qualification	Support access to relevant qualifications	Engagement with providers to offer qualifications to sector	Remains a priority
The Providers Survey reported that formal childcare providers would welcome more advice and support in relation to supporting children with special needs and disabilities.	Continued disability awareness training offered to the childcare sector.	Ongoing disability awareness including increased training following ALN Act	Anticipated increased view from sector that they can meet all children's needs
Evidence that Swansea-based childcare providers would benefit from more support and advice on the issue of CIW compliance.	Provision of information and grant funding to support essential compliance.	Continued guidance offered via LA and partners	Anticipated increase in settings' understanding
The Best Start Swansea Campaign is a PSB priority and therefore partnership working is enshrined in all aspects of work.	Continue to extend invitations to all key partner organisations enabling their representation at Early Years sub-group meetings.	The Best Start campaign continues to be promoted	Evidence of key messages having beneficial impact on families
Excellent collaboration between the Swansea FIS and Flying Start programme, Swansea Families First, Team Around the Family, Play Sector, Parenting Team and Swansea-based Children & Family Centre's	Ensure that the work of the Early Years Service dovetails in to wider/external priorities, to create a holistic and joined up approach – and ethos.	Continued joint working and development of new initiatives such as Pathfinder	Coordinated approach to planning and delivery and shared understanding

1. Strategic Coordination – Summary of Key Findings

- A major strength of the sector is how internal and external partners are engaged to ensure a coordinated approach to planning and delivery, with the contribution made by all recognised as essential.

- With the recognition that there are potentially a number of ways for service users to access childcare / early years services, the recommendation to develop a single 'early years front door' needs further investigation.
- The CSA itself and associated action plan provides a focal point for measuring progress and should be central to local policy development and planning.

1. Strategic Coordination – Action Plan				
Challenge	Action	Responsible	Timescale	Outcome
1.1 Need to ensure a coordinated approach for service recipients	1.1 Further development of Early Years 'Front Door' type approach	LA / Partners	Ongoing	Single point of entry is identified with effective mechanisms in place
1.2 Need to ensure CSA findings and recommendations are drivers for childcare policy and funding	1.2 Ensure findings and actions are included within local policy and strategic planning 1.2 Ensure local funding criteria reflects findings of CSA	LA	Ongoing	All relevant policy and planning gives due regard to CSA findings and recommendations
1.3 Ensure internal and external partners are supported to contribute to CSA implementation	1.3 Assess internal capacity including maintaining Sufficiency Assessment support role 1.3 Ensure external partners e.g. development officers are effectively resourced	LA	March 23	Continued sufficiency support in place to identify and respond to need Capacity to support settings and develop priority actions

2. Partnership Working and Consultation

2.1 Partnership Working

2.1.1 Swansea recognises that assessing and securing childcare sufficiency can only be achieved via a partnership approach. It has an established approach to engaging key partners to ensure all have the opportunity to feed into decision-making.

2.1.2 A Childcare Sufficiency Working Group was developed in 2019 with a specific remit of responding to previously identified CSA actions and identifying further gaps or areas for development. This group proved particularly successful at engaging those partners who may not traditionally have been engaged, e.g. Planning Officers leading on strategic housing developments to identify future trends, or Local Area Coordinators.

2.1.3 The work undertaken as part of the Early Years Integration and Transformation (Pathfinder Programme) has provided a focus for partnership working across both Swansea and Neath Port Talbot Local Authorities and the Abertawe Bro Morgannwg University (ABMU) Health Board.

2.1.3.1 This partnership work builds on the early success of the Early Years Opportunities Group and Best Start Swansea and historically the Early Years Development and Childcare Partnership (EYDCP).

2.1.4 Umbrella Organisations

2.1.4.1 Swansea has funded the umbrella organisations – Clybiau Plant Cymru Kids Club, Early Years Wales and Mudiad Meithrin to undertake development work with their member settings throughout the past 5 years.

2.1.4.2 Significantly, partner organisation target monitoring was revised in 2018 so that their targets reflected the findings of the previous year’s CSA Progress Report. The majority of actions from the 2017 CSA involved partner organisation contribution.

2.1.4.3 An agreement is also in place with PACEY Cymru to ensure that childminders are supported and engaged.

2.1.5 Setting Engagement

2.1.5.1 Ensuring the local childcare sector are central to the engagement process is key and occurs on an ongoing basis.

2.1.5.2 The Childcare Opportunities Manager, holds regular meetings with Day Nurseries and Childminders, as well as including sessional care, as a two-way process for disseminating and receiving information. As part of the 2022 CSA, the SOSA attended these meetings to encourage feedback.

2.1.5.3 Additionally, a sector survey was developed locally to capture the views and needs of the sector.

2.1.5.4 Networking events are generally held annually, although the Covid-19 pandemic inevitably impacted upon this. As well as the opportunity for sector staff to learn new skills or hear about new developments, these events provide a key opportunity for interaction with the local authority and to raise concerns or offer feedback.

2.2 Consultation

2.2.1 Requirements

2.2.2 In conducting the CSA, Schedule 2 of the Statutory Guidance (2016) states a need to consult with the following stakeholders in their area, as considered appropriate:

- children;
- parents or carers;
- childcare providers;
- persons representing children, parents or carers and childcare providers;
- persons with an interest in childcare;
- persons representing those with an interest in childcare;
- persons representing local employers and employer organisations;
- local employers;
- neighbouring local authorities;
- schools;
- further education colleges

2.2.3 Local authorities must also consult with the following partnerships and organisations in conducting their CSA:

- Safeguarding Children Board;
- Welsh Medium Education Forum (if established in the local authority area);
- Play Monitoring Group (if established in the local authority area)
- Local authorities must also notify their local Job Centre Plus offices and invite their views on the Childcare Sufficiency Assessment

2.2.4 There is a requirement to reflect input from FIS/ National Childcare Umbrella Groups in assisting local authorities to plan and safeguard sufficiency of childcare provision in their area.

2.2.5 Additionally, to consult as appropriate with children, parents/carers, providers, representatives of these groups, persons with interest in childcare and their representatives, local employers, and persons representing them and employer organisations, neighbouring local authorities, educational establishments

2.2.6 It is essential to evidence consultation with specific stakeholders set out in Schedule 2 of Childcare Statutory Guidance (2016)

2.2.7 In completing the assessment authorities must ensure input from relevant LA policy and delivery areas e.g. education (including Welsh medium), early years, play, planning, housing, transport and social care.

2.2.8 Ultimately, it is essential to confirm that the draft CSA was published for a 28 day consultation period before being published on their website and provide the publication date for this.

2.3. Methodology

2.3.1 The overall approach to consultation was to maximise the opportunities, formats and timescales available for all those with an interest in local childcare to feed in to the CSA. It is recognised that consultation must be meaningful to ensure that issues or concerns are raised. Equally, it is recognised that there must be the potential for those either directly or indirectly involved in local childcare to identify an opportunity or development that might support sufficiency and these views need to be captured.

2.3.2 Those specific need or interest groups identified in the statutory guidance were incorporated, either within generic methods or a specific approach where considered most appropriate.

2.3.3 Barriers to engagement were at the forefront of planning to ensure that nobody was prevented from having an input. Considerations included ensuring that where on-line surveys were used, there was a hard copy version available for those without access to IT.

2.3.4 A range of surveys were developed locally via Microsoft Forms. Consideration was given to the Welsh Government-developed Parental Survey and ensuring local surveys complimented not replicated this. The following were developed and live between October and December 2021;

- Employees' Survey*
- Employers Survey
- Sector Survey

2.3.4.1 * An additional employees' survey was developed, in part due to a historically low response to the employers' survey, recognising that often it asked employers to speculate their employees needs and also as a way to increase responses from parents without replicating the WG parental survey.

2.3.4.2 All locally produced surveys were considered by the authority's Consultation Coordinator to ensure they were fit for purpose.

2.2.4.3 It was noted that, with the use of on-line surveys, responses received were invariably inputted by the public immediately after being made aware of them, or not at all. Several surveys were accompanied with a social media post or were placed in newsletters or blogs. As the time of completion was shown on the excel summary sheets, we were able to determine that approximately 75% of responses were likely to have been immediately upon discovering the survey – very few people went back a day, or even a few hours later. This helped identify the need for as many awareness opportunities as possible.

2.3.5 As engagement with children & young people was essential, the CPSM and SASO worked closely with the authority's participation team to build on successful consultation and engagement used for the 2017 assessment.

2.3.5.1 The SASO undertook a range of observation based consultation sessions within childcare settings.

2.3.5.2 Additionally, it was recognised that there should be additional consultation with children and young people about their childcare preferences that took place outside of settings. It was felt important to identify what mattered to them, e.g. would they rather be with others their own age than in childcare with much younger children or would a school-based setting be good for familiarity or spending more time in a place they were already in enough?

2.3.6 A further approach to consultation was via on-line focus groups. These were identified early on as an essential element due to Covid-related restrictions making face to face discussion problematic.

2.3.7 Findings

2.3.7.1 Specific findings will be included within the relevant section, other than those from children & young people, for which there is no dedicated section.

2.3.7.2During the engagement sessions that were carried out in primary schools across Swansea, children and young people were asked 'do you get looked after by someone else other than family so that they can work?'. Out of 127 children and young people, 52.7% said yes and 47.2% said no.

2.3.7.3 Out of the 52.7% (67 C&YP) that said yes, 58% said they get looked after by someone else after school, 46% said during the school holidays and 31% answered 'other'. 34 children said they get looked after by family, 31 said family friends, 10 said childcare setting and only two said they get looked after by a childminder.

2.3.7.4 Lastly, children were asked 'If you could choose where to go for childcare, what would be important? You can choose more than one' and the most popular answer was 'somewhere friends go' (59.8%) with 'somewhere with children my own age' shortly behind (52.2%).

2. Partnership Working & Consultation – Summary of Key Findings

• It is evident that childcare sufficiency is best achieved via a partnership approach. It is recognised that partners such as the umbrella organisations play an essential role in ensuring childcare sufficiency.
• By engaging service users and service providers, key issues are identified that are essential to shaping planning and delivery.
• It is noted that families should be engaged more frequently than the 5 year cycle of the CSA. *If consultation only takes place during CSA undertaking once every 5 years, a parent may only have their voice heard twice in the years from birth to 12.*

2. Partnership Working & Consultation – Action Plan				
Challenge	Action	Responsible	Timescale	Outcome
Ensure ongoing engagement with stakeholders so that feedback and identified needs are current and valid	Annual stakeholder surveys Identify additional findings and trends	LA	Ongoing	Issues or gaps are identified and validity is maintained
2.2 Recognition of the necessity of a partnership approach to effectively achieve sufficiency	Continue to fund umbrella organisations' development officers with targets to reflect sufficiency	LA / Umbrella Orgs	Ongoing	Collaborative approach with shared outcomes that equally demonstrates contributions made by all
2.3 Need to ensure parents' views are heard more than once every 5 years	Complete annual parental needs survey and develop on-line system to identify issues	LA	Annually	Parental views and needs are effectively captured

3. Welsh in Education Strategic Plans (WESPs)

3.1 Requirements

3.1.1 It is a requirement to ensure that the assessment considers each areas' WESP and how its findings and recommendations might impact on childcare planning and delivery.

3.2 Childcare Implications within Swansea

3.2.1 Swansea's draft Welsh in Education Strategic Plan (WESP) September 2022 – August 2032 identifies a 10 year plan for increasing and improving the planning of the provision of Welsh-medium education in the area.

3.2.2 We also recognise that it is more difficult in some parts of the city and county to access Welsh-medium provision from an early age. We will seek to increase opportunities to access Early Years provision so that more parents have a real choice in making a preference for their children's education.[1]

3.2.3 In relation to Early Years, the WESP states that *'The early exposure of children to the Welsh language is an important factor in expanding Welsh-medium education provision, and is key in the context of our target to increase the number of Year 1 learners taught through the medium of Welsh'.*

3.2.3.1 The WESP includes a specific target to;

'Increase the Welsh-medium pre-school offer as part of a wider marketing strategy to promote the benefits of being bilingual. This could include at least one Cylch Meithrin linked to every Welsh-medium primary school and/or areas within their catchment and looking at opportunities to increase the Flying Start Welsh offer within our current settings'

3.3 Key outcomes

3.3.1 To support the planning process, we are required to arrange our Plan around the outcomes below. The outcomes reflect a learner's education journey and are consistent with the policy areas of Cymraeg 2050 and Education in Wales: Our National Mission.

• Outcome 1: More nursery children/three year olds receive their education through the medium of Welsh

What we are required to do…

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Objective 1 requires us to set out how we will use data derived from our review of the sufficiency of childcare provision for our area (under duties set out in regulation 3 of the Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016) to inform planning of Welsh-medium education.

3.3.2 We must also make clear how we will provide parents and carers with information as to the availability and type of Welsh-medium education provision on offer, how we will provide parents and carers with information stating that Welsh-medium education is an option for persons regardless of their linguistic background and how we will make best use of information regarding the benefits that bilingualism and multilingualism can bring.

3.3.3 Finally, we need a statement setting out how we, in collaboration with other local authorities as necessary, will promote access to education and training through the medium of the Welsh language in relation to learner transport in line with the duty set out under section 10 of the Learner Travel (Wales) Measure 2008).

What we will do…

Provision
Develop/maintain a Welsh-language pre-school provision in each Welsh-medium Primary School catchment area by 2025. We will continue to work closely with Mudiad Meithrin and other partners to develop services in areas where there is currently no provision.

Provide a Welsh-medium offer in all our Flying Start settings and explore opportunities to increase the number of Welsh-language settings. There is currently one specific Welsh-language Flying Start Childcare Provision in Swansea.

Training
Use Child Sufficiency Data to audit the current provision and identify training needs of practitioners across the sector. This data will allow us to plan relevant training and support the sector in promoting the benefits of being bilingual and signposting to the Welsh-medium offer.

Secondary schools to work with Mudiad Meithrin and Gower College Swansea to offer the childcare qualification through the medium of Welsh and promote local career opportunities in the sector.

Childcare

- Use data from the annual Self-Assessment Service Statement (SASS) completed by all Care Inspectorate for Wales (CIW) settings to map the current Welsh language offer.
- Develop a Swansea benchmark to identify and promote the Welsh language offer across all childcare settings.
- Encourage and promote an Active Offer across all pre-school and childcare providers.

3.4 Considerations

3.4.1 There is a need to consider the implications of the investments as part of the 21st Century School provision.

3.4.2 An additional consideration relates to Welsh language Out of School Childcare linked to each Welsh medium childcare. Although all have After School Clubs, over half (5) are not CIW registered and will need support and encouragement to register.

3.4.3 An Out of School Club option needs to be available to ensure the childs' childcare journey can be delivered through the medium of welsh and not end once the child starts full time school.

3. WESPS – Summary of Key Findings

- With a target to develop/maintain a Welsh-language pre-school provision in each Welsh-medium Primary School catchment area by 2025 there will need to be developments over the coming years.
- With only one Welsh-medium Flying Start setting, the target to 'provide a welsh-medium offer' in all Flying Start settings will require some consideration.
- Given the essential contribution of umbrella organisations such as Mudiad Meithrin it would be advantageous to look at potential to increase their local capacity

3. WESPS – Action Plan

Challenge	Action	Responsible	Timescale	Outcome
3.1 Need to promote the benefits of being bilingual.	3.1 Increase the Welsh-medium pre-school offer as part of a wider marketing strategy	LA & Partners	March 25	An increase in the number of pre-school places available through Welsh medium
3.2 Need to develop Welsh-medium wraparound childcare options to support parents.	3.2 Work with Mudiad Meithrin to open 3 new Cylch Meithrin settings (currently 7 settings in Swansea) in the school catchment areas of YGG Lon Las, YGG Y Login Fach and YGG Tan-y-lan and explore opportunities 3.2 Additionally, look to increase development officer capacity to enable this	LA / Mudiad Meithrin	March 25	An increase in the number of wraparound places available through Welsh medium
3.3 Need to increase the opportunities for early Welsh language interaction for parents and their children	3.3 Work with Mudiad Meithrin and other partners to start 5 new Cylchoedd Ti a Fi (currently 9 in Swansea)	LA / Mudiad Meithrin	March 25	Increase in number of families with confidence to choose welsh medium childcare

3.4 Need to increase the use of Welsh and explore opportunities for more Welsh language settings	3.4 Develop a Welsh language strategy across all our Flying Start settings 3.4 Work with Cwlwm partners promoting the Camau Projects	LA / Partners	March 24	Strategy in place with measurable outcomes aimed at increasing use of Welsh
3.5 Need to ensure Welsh medium development support is in place to help meet actions	3.5 Continue to fund Mudiad Meithrin development hours	LA	Ongoing	Welsh medium development support in place to help achieve outcomes
3.6 Need to promote CIW registration of Out of School Clubs servicing Welsh medium schools (5 out of 9 unregistered) so there is suitable childcare as the child grows.	3.6 Promote benefits of registration to identified settings	LA / Partners	Ongoing	Increase in registration amongst identified settings

4. Overview – Childcare Types, Services and Places

4.1 Childcare Types

4.1.1 To effectively assess sufficiency, it is essential that each local authority is working towards agreed definitions of what constitutes each childcare ‘type’.

Childminder	Childcare provided by one or more people from birth upwards within domestic premises that is not the child’s own home for reward. Care for a child aged 12 or over is not currently subject to registration. Where childcare is provided for children under 12 years of age, the total period of care in any one day does not exceed two hours. This is unless any of the other exceptions to registration outlined in Doc 1 apply. Childminders can offer: Full day care and part time care including before and after-school provision including atypical hours e.g. evening, weekends and overnight provision, wrap around care and provision during the school holidays. For children aged under 12 years of age the exceptions in Doc 1 would apply in terms of the care offered. These exceptions do not apply where care is provided to children aged 12 years and over
Sessional Day Care	Childcare for children from aged 2 onwards on non-domestic premises. The service is mainly used by children aged 3 to 5 rather than babies or toddlers, although some may admit 2 year olds. The total period of care in any one day does not exceed two hours and is for less than six days a year. This is unless any of the other exceptions to registration for day care outlined in Doc 1 apply. It may include: Playgroups, Cylchoedd Meithrin, lunch and wrap around care.
Crèches	Occasional day care for children aged from birth upwards on non-domestic premises. Some are in permanent premises and care for children while parents are engaged in particular activities (e.g. training, shopping or sport). Others are established on a temporary basis to care for children while their parents are involved in time-limited activities (e.g. a conference or an exhibition). Care for a child aged 12 or over is not currently subject to registration. Where care is provided for children under 12 years of age, crèches do not need to be registered if they run for no more than 2 hours a day and less than six days a year. This is unless any of the other exceptions to registration for day care outlined in Doc 1 apply. These exceptions do not apply where care is provided to children aged 12 years and over.
Out of School Care	Out of School Care Childcare outside of the child’s full time school day and includes care provided before school, after school and during the school holidays. It does not include wrap around care and the Welsh Government free breakfast in primary schools scheme. Care for a child aged 12 or over is not currently subject to registration. Where care is provided for children under 12 years of age, the total care provided cannot exceed 2 hours a day and must be for less than six days a year. This is unless any of the other exceptions to registration for day care outlined in Doc 1 apply. These exceptions do not apply where care is provided to children aged 12 years and over

Open Access Play Provision	Provision of staffed open access play opportunities for children usually in the absence of their parents. This can be permanent or temporary provision located in a variety of settings with or without premises and can include holiday playschemes. The provision usually caters for a wide age range of children, normally aged 5 years and over. Children are not restricted in their movements, other than where related to safety matters and they are not prevented from coming and going as and when they wish. Care for a child aged 12 or over is not currently subject to registration. Where care is provided for children under 12 years of age, open access play provision does not need to be registered if they run for no more than 2 hours a day, operating for less than six days a year. This is unless any of the other exceptions to registration for day care outlined in Doc 1 apply. These exceptions do not apply where care is provided to children aged 12 years and over.
Nanny (Voluntary Approval Scheme)	A nanny is employed directly by the parents of up to two families caring for the children in the home of either of the families. Nannies can offer: Full day care and part time care including before and after-school provision including atypical hours e.g. evening, weekends and overnight provision, wrap around care and provision during the school holidays.

5. Supply of childcare

5.1 Requirements

5.1.1 For this section, the requirement is to supply information on childcare provision filled and available for children up to the age of 18 by age range and childcare types as specified in the Childcare Statutory Guidance (2016), noting that with respect to CIW Registration, National Minimum Standards focus on those aged 0-12 years.

5.1.2 There is a requirement to capture the number of full and part time places available, filled, vacant and unused spaces, and the number of children on providers' waiting lists[2].

5.1.3 It must include supply information broken down for childcare types for both **registered and unregistered provision**

5.1.4 Findings must include;

- the number of full and part time places available, filled, vacant and unused spaces, and the number of children on providers' waiting lists
- the number of places filled and available for which parents could use the
  - childcare element of working tax credit and universal credit
  - employer supported childcare and tax free childcare
- the number of places filled for children who have special educational needs or require specialist care due to a disability
- the supply of **Childcare Offer** places in addition to Foundation Phase Nursery and Flying Start
- the number of Welsh medium childcare places filled and available, plus information about childcare provision in other languages
- the times at which childcare is available and numbers of childcare providers offering flexible childcare hours
- the range of services offered by childcare providers eg. Full Day care provision may provide a range of services such as full day nursery, play group wrap around etc
- the range of session lengths and range of charges offered by providers

5.2 Data Capture / Methodology

5.2.1 A primary source of data capture is the **Self-Assessment of Service Statement of Service (SASS)**[3] which all registered childcare settings were required to complete and submit during 2021.

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5.2.2 As the SASS was only completed by registered settings, an additional **provider survey** was developed to capture the data for unregistered settings, as well as including any no-responders to the SASS.

5.2.3 The Dewis information system was an additional source of data capture for registered settings. It must be highlighted, that information obtained from DEWIS was generally the starting point for data capture and, accordingly, has been highlighted as a key area to maintain.

5.2.3.1 As clarified by the lead DEWIS processing FIS Officer, The Dewis Data was captured between December 2020 and March 2021. Any changes that we are made aware of, or become aware of, are made to the data. Any changes to a settings Registered Status with CIW are checked every week with CIW and updated. Settings are also able to update their own data, currently 17.9% of settings have updated their data at least once since Go Live[4].

5.2.4 Given the limitations on SASS data which made identification of specific settings' findings problematic and time consuming, it was decided to use a Dewis-generated spreadsheet as the starting point from which to compile supply data. Additional data gleaned from the SASS and our own provider survey was added to this spreadsheet to provide a more holistic picture.

5.2.5 A consideration when assessing supply in relation to each childcare type is that some provide elements of either types of care, e.g. Full Day Care provides a considerable number of Out of School Childcare places, as well as many offering Holiday Care.

[4] FIS Officer, January 2022. Go Live refers to the first date that Dewis was live for inputting in Swansea.

5.3 Findings

5.3.1 An overview of settings and places provided by type illustrates the relative increase / decrease during the period since the previous CSA, as well as changes per year. As can be noted, overall there is an increase in Full Day Care, as well as number of After School Places. However, there has been an overall reduction for Childminders, Sessional Care and Crèche.

Type of setting	2018	2019		2020		2021		2022		Percentage increase/ decrease 2018-2022
Full Day Care	33 Settings	32	Settings	35	Settings	37	Settings	38	Settings	9.38%
	1729 Places	1642	Places	1822	Places	1898	Places	1968	Places	10.96%
Childminder	110 Settings	105	Settings	94	Settings	86	Settings	71	Settings	-10.48%
	794 Places	768	Places	728	Places	682	Places	588	Places	-5.21%
Sessional	41 Settings	45	Settings	41	Settings	35	Settings	38	Settings	-8.89%
	1019 Places	1071	Places	1070	Places	855	Places	1013	Places	-0.09%
After School Club	27 Settings	25	Settings	25	Settings	25	Settings	25	Settings	0.00%
	971 Places	947	Places	1096	Places	927	Places	1118	Places	15.73%
Holiday Care	16 Settings	16	Settings	16	Settings	11	Settings	8	Settings	0.00%
	466 Places	466	Places	466	Places	435	Places	377	Places	0.00%
Creche	1 Settings	2	Settings	1	Settings	1	Settings	0	Settings	-50.00%
	11 Places	26	Places	15	Places	15	Places	0	Places	-42.31%

5.3.2 The ward summary below provides an overview of levels of provision by area. Population statistics, as well as details of strategic housing development sites, are shown to help assess whether there appears to be sufficient of the various types of provision, as well as overall.

5.3.2.1 This does not give consideration to neighbouring wards, although this is reflected elsewhere. For example, a ward identified as deficient may have sufficient accessible provision in the surrounding area.

5.3.3 Information provided for SASS details the number of children registered to care for by the 153 respondents (4128) and the number of children currently on their books by age.

5.3.3.1 Notably, 8 of the 9 aged 15-17 were identified by one setting.

Ages Of Children On Books									
No of Children Currently Registered to Care For	Under 1	1 Yr	2 Yrs	3 Yrs	4 Yrs	5-7 Yrs	8-11 Yrs	12-14 Yrs	15-17 Yrs
4128	130	634	1497	1113	836	853	680	19	9

5.3.5 In terms of full day places, the SASS asks settings to state attendance between 7th June and 4th July 2021. From the responses given, an average of 3697 children attended full day care over a week. Of the 101 settings stating they offered full day care, 18 stated they had a waiting list compared to 82 who didn't. This translated into 74 children on the waiting list for a place and a surprising 1264 spaces available for full day care. It is probable that there is a story behind this figure, that would reduce it, and that is highly likely to be related to Covid but, regardless, it suggests there are sufficient spaces to meet requirements, this includes sessional care.

Full Day Care											
Sample Size	Do you deliver this type of care?	Total no. of children who attended this part of the service during week 1 (June 7th to 13th 2021)	Total no. of children who attended this part of the service during week 2 (June 14th to 20th 2021)	Total no. of children who attended this part of the service during week 3 (June 21st to 27th 2021)	Total no. of children who attended this part of the service during week 4 (June 28th to July 4th 2021)	Average no. of children who attended this part of the service, per week	Do you currently have a waiting list for this part of the service for an immediate place?	How many children are on the waiting list for an immediate place?	How many unfilled spaces do you have for this part of the service?	Day Care	Child-Minder
153	101 Yes 12 No	3815	3711	3645	3668	3697	18 Yes, 83 No	74	1264	39 Yes 10 No	62 Yes 2 No

Sessional Care									
No of Children Currently Registered For Sessional Care	Under 1	1 Yr	2 Yrs	3 Yrs	4 Yrs	5-7 Yrs	8-11 Yrs	12-14 Yrs	15-17 Yrs
508	0	0	398	98	56	37	36	0	0

5.3.6 The findings are replicated in the SASS findings for after school places during the same period, with the number of unfilled places at 1,992 being close to the average attendance of 2,017.

5.3.6.1 Notably, one day care setting recorded 762 available places against an average attendance of 59 which has skewed the figures to some degree.

5.3.6.2 Ultimately, the comparison of 43 on a waiting list compared to 1992 unfilled places suggests an even more marked over-supply, with the same caveat of being likely affected by Covid-19. Of these 43, a waiting list of 20 was identified at one day care setting, which requires consideration, but suggests any other waiting lists are minimal.

After School											
Sample Size	Do you deliver this type of care?	Total no. of children who attended this part of the service during week 1 (June 7th to June 13th 2021)	Total no. of children who attended this part of the service during week 2 (June 14th to June 20th 2021)	Total no. of children who attended this part of the service during week 3 (June 21st to June 27th 2021)	Total no. of children who attended this part of the service during week 4 (June 28th to July 4th 2021)	Average no. of children who attended this part of the service, per week	Do you currently have a waiting list for this part of the service for an immediate place?	How many children are on the waiting list for an immediate place?	How many unfilled spaces do you have for this part of the service?	Day Care	Child-minder
153	101 Yes 51 No	1919	2078	2082	2052	2017	10 Yes 92 No	43	1992	51 Yes 39 No	50 Yes 12 No

5.3.6 Settings completing the SASS were asked if they offer early education placements. Of the 153 respondents, 43 – 29 Day Care Settings and 14 Childminders – said they did.

5.3.6.2 During the sample weeks from 7th June to 4th July 2021, it is noteworthy that with an average overall weekly attendance of 1404, only 16 children were identified as being on a waiting list with 709 unfilled spaces, suggesting no gap in provision, if anything, a slight over-supply.

5.3.6.3 The following data details where settings offer early education placements (and should be cross-referenced with data in Section 14).

Type(s) of care - Early Education Placement										
Do you deliver this type of care?	Total no. of children who attended this part of the service during week 1 (June 7th to 13th 2021)	Total no. of children who attended this part of the service during week 2 (June 14th to 20th 2021)	Total no. of children who attended this part of the service during week 3 (June 21st to 27th 2021)	Total no. of children who attended this part of the service during week 4 (June 28th to July 4th 2021)	Average no. of children who attended this part of the service, per week	Do you currently have a waiting list for this part of the service for an immediate place?	How many children are on the waiting list for an immediate place?	How many unfilled spaces do you have for this part of the service?	Child-minders Yes	Day Care Yes
43/153	1363	1413	1334	1456	1404	6 Yes 41 No	16	709	14	29

5.3.7 Overnight Care

5.3.7.1 No respondents to the SASS identified themselves as offering overnight care.

5.3.8 Swansea's own sector survey, with a sample size of 50 including non-registered provision, provided a similar picture for the period 2-6th August 2021, with only 1525 of the 2057 available places taken up and only 22 children were unable to attend due to lack of available places.

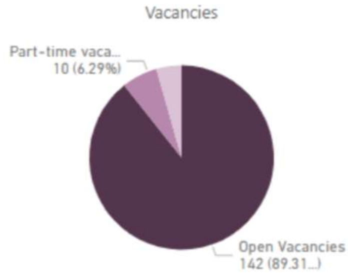
Swansea Sector Survey Available Places 2-6/8/21					
For those settings open during the week of Monday 2nd to Friday 6th August 2021, please firstly state the total number of available places over the week (e.g. 24 per day x 5 days) - if you didn't ...		Next, enter the total attendance over the course of the week of 2nd to 6th August		Finally, if you were unable to accept all who wished to attend as you were full, please state the number on a waiting list / unable to be accepted during the week of 2nd to 6th August.	
Sample Size: 50	2057		1525		22

5.3.9 Ward data is cross-referenced against both population data and details of relevant imminent strategic development site, i.e. featuring high numbers of 3+ bedroom housing, to give a RAG grading of each type. These RAG gradings are combined to provide an overall grading for each ward.

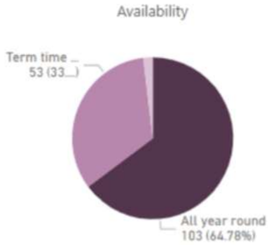
Ward	Full Day Care		Childminders		Out of School Care		Sessional		Population WIMD (mid 2020)		
	Settings	Places	Settings	Places	Settings	Places	Settings	Places	Total	0 to 4	5 to 15
Bishopston	1	45	0	0	0	0	0	0	3,138	91	369
Bonymaen	0	0	2	14	1	80	2	32	7,523	365	939
Castle	2	80	0	0	0	0	3	84	17,595	585	1,104
Clydach	1	19	2	16	0	0	4	76	7,638	396	1,058
Cockett	2	119	5	46	1	35	1	40	14,465	721	1,967
Cwmbwrla	0	0	3	24	0	0	1	24	7,862	431	942
Dunvant	1	70	1	7	0	0	0	0	4,256	185	491
Fairwood	0	0	1	10	0	0	0	0	2,824	104	378
Gorseinon	3	126	6	54	1	32	0	0	4,698	238	720
Gower	0	0	2	20	0	0	0	0	3,573	104	374
Gowerton	1	37	1	12	0	0	0	0	5,092	213	630
Killay North	0	0	3	20	0	0	1	19	2,754	125	241
Killay South	0	0	2	20	0	0	0	0	2,205	107	184
Kingsbridge	0	0	0	0	0	0	0	0	4,137	256	474
Landore	0	0	1	8	0	0	3	69	7,143	395	858
Llangyfelach	0	0	0	0	0	0	1	50	5,077	265	631
Llansamlet	6	344	8	67	0	0	1	12	15,139	905	2,192
Lower Loughor	0	0	2	20	0	0	0	0	2,393	155	344
Mawr	0	0	0	0	0	0	0	0	1,857	90	256
Mayals	0	0	1	6	1	16	0	0	2,635	118	298
Morriston	2	205	9	74	0	0	1	10	16,563	827	1,990
Mynyddbach	1	121	1	10	0	0	3	58	9,018	423	1,081
Newton	0	0	2	12	0	0	0	0	3,395	121	388
Oystermouth	0	0	0	0	0	0	1	36	4,013	130	392
Penclawdd	1	37	3	27	0	0	0	0	3,569	125	375
Penderry	1	33	1	5	1	36	3	102	12,444	944	2,256
Penllegaer	1	29	1	8	0	0	1	150	3,372	212	520
Penyrheol	0	0	0	0	0	0	1	20	5,911	308	783
Pontarddulais	1	73	0	0	1	32	2	24	6,691	343	982
Sketty	3	210	3	22	2	110	3	88	14,492	562	1,465
St Thomas	1	42	2	20	0	0	1	20	8,272	412	910
Pennard	1	32	0	0	0	0	0	0	2,777	92	357
Townhill	2	63	0	0	1	30	3	72	9,166	855	1,672
Uplands	5	228	3	23	3	171	1	15	15,397	361	896
Upper Loughor	0	0	2	20	1	30	0	0	2,897	136	378
Westcross	2	56	4	23	3	141	1	12	6,401	285	711
	38	1968	71	588	27	1276	38	1013			

5.3.9 Information provided by settings to inform Dewis gives us a useful overview of supply across Swansea.

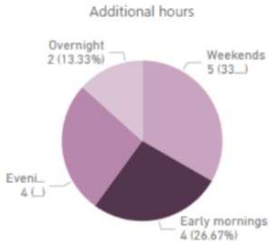
5.3.9.1 142 settings identify that they had open vacancies at the time of data capture (predominantly March 2021), with a further 10 stating that they have part-time / occasional vacancies. Very few stated they had no vacancies.



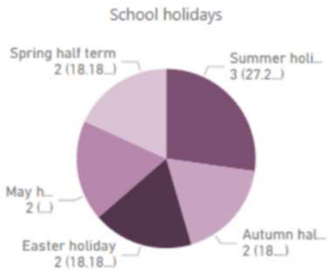
5.3.9.2 In terms of availability, 64.78% (roughly 2/3) identified year round availability, with 33% stating term-time only. Holiday only accounted for the remaining 2% of responses.



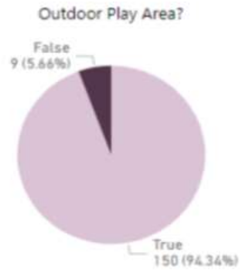
5.3.9.3 Notably, few settings stated that they offer additional hours, with no more than 5 of the respondents selecting any of either weekends, evenings or early mornings and only 2 selecting overnight.



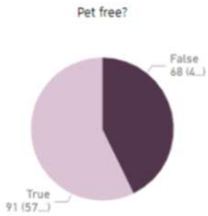
5.3.9.4 Whilst of limited value in determining levels of provision, due to the low number who responded, there appears a consistent rate of holiday delivery across each of the holiday periods (except Christmas with a 0 response) other than one additional operating summer holidays only.



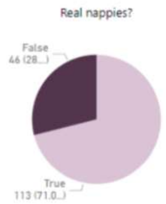
5.3.9.5 A positive indicator is that 94% of settings identified themselves as having an outdoor play area. These may vary in size and content, but suggests a high level of opportunities for outdoor play (identified as key in the 2017 CSA).



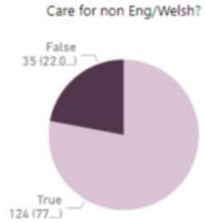
5.3.9.6 A further indicator was whether the setting was pet free – most likely to be a factor for childminders. 43% of settings stated that they weren't pet free.



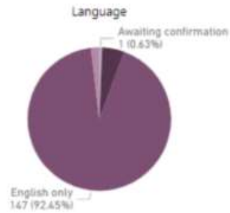
5.3.9.7 71% of settings indicated that they used real nappies.



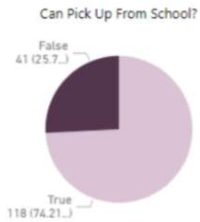
5.3.9.8 22% of settings stated that they were unable to care for 'non-English/Welsh' children. This is one that will require additional consideration to determine what is specifically meant by this, as there is a suggestion that non-English/Welsh speaking families may face barriers to access.



5.3.9.9 This is further backed up by the fact that over 92% responded that their childcare provision was available in English only.

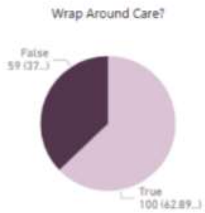


5.3.9.10 74% of respondents stated that they provide school pick-ups, which is often cited as a key issue for parent/carers.

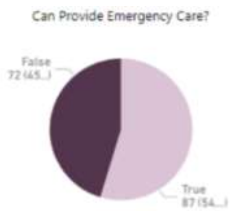


5.3.9.11 Just under 24% stated that they can pick up from other places. It would be beneficial to gain a full picture of what/where these are.

5.3.9.12 Just under 63% of settings stated that they provide wrap around care.

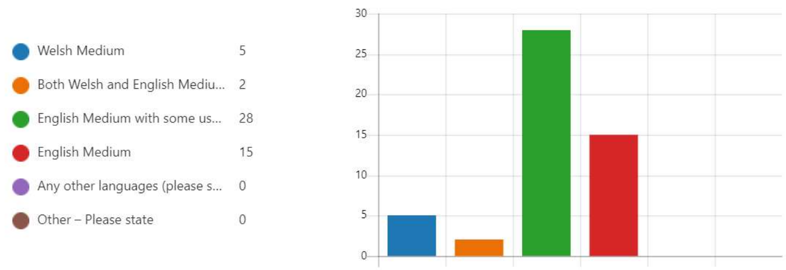


5.3.9.13 A positive is that 54% of settings state that they can provide emergency care, which is useful in relation to the role of childcare in supporting families in crisis, noting emergency care can be for more than one reason.



5.3.10 Swansea's Sector Survey can be used to identify supply in terms of language used by a range of registered and unregistered providers. This is due to being distributed amongst unregistered provision, e.g. open access play projects for a more encompassing response.

8. Which is the main language through which your service is provided?
More Details



Source: 2021 Sector Survey (Swansea Council) Sample Size 50

5.3.11 Coram Holiday Childcare Survey

5.3.11.1 The 2021 Coram Holiday Childcare Survey provides additional information on when settings are open over holiday periods. It provides a comparison for Wales overall in relation to the other Home Countries.

Coram Family and Childcare
Childcare Holiday Survey 2021 **18**

Table 17 - Proportion of childcare settings open in each holiday, by nation

	Nation	Summer	Easter	Christmas	Half term	Teacher training days
Public sector	Great Britain	36%	29%	20%	67%	47%
	England	56%	48%	16%	44%	10%
	Scotland	29%	15%	34%	77%	62%
	Wales	15%	11%	16%	91%	87%
Private and voluntary sector	Great Britain	82%	70%	34%	66%	19%
	England	80%	68%	34%	64%	16%
	Scotland	84%	68%	3%	65%	62%
	Wales	100%	96%	51%	95%	31%

- In Great Britain as a whole, the private and voluntary sector provides a greater proportion of settings that are open during all the holiday periods compared to the public sector. The exception is teacher training days where the public sector provides a greater proportion of settings open.
- 67 per cent of public sector settings are open during the half term compared to just 20 per cent during Christmas, 29 per cent during Easter holidays and 36 per cent during summer holidays. Within the private and voluntary sector, 82 per cent are open in the summer compared to 19 per cent during teacher training days.
- There are significant drops in the proportion of holiday childcare opening for summer and Easter holidays compared to previous years particularly in the public sector, most likely as a result of the effects of Covid meaning that it was not possible or preferable for provision to open this year and is likely to make it harder for families to find childcare or their first choice of childcare this year.
- Christmas holidays have the lowest proportions of childcare providers open.

5.3.11.2 Swansea's 2022 response for the Coram Survey provides useful additional information for a range of areas relating to holiday care. Notably, it lists the price difference between costs of maintained and non-maintained settings.

	Typical price **per day**	Typical price **per week**
Maintained sector	£14.50	£72.50
PVI sector	£29.63	£148.15

5.3.11.3 However, showing the total number of holiday clubs in the non-maintained (PVI) and maintained sectors show the price for the latter is based on one setting. Note, this figure includes all settings offering holiday clubs, which differs from the map in section 7 which features the 2 'holiday-only' settings.

	Total number of holiday clubs
Total in PVI sector	14
Total in maintained sector	1

5.3.11.4 In terms of when the clubs are open, notably all open during the summer holidays, yet this reduces significantly for the other holidays.

	Summer holiday	Easter holiday	Christmas holiday	Half terms	INSET days	Total # of clubs
Maintained sector	1	1		1		**1**
PVI sector	14	4	1	6		14

5.3.11.5 The Survey also makes an assessment of holiday childcare sufficiency across a range of areas. It should be noted that these findings were developed in conjunction with the 2022 CSA. It asks whether it is felt there is 'enough' for each;

	Yes: in all areas	Yes: in some areas	No	Data not held or cannot tell
4-7 year olds		x		
8-11 year olds		x		
12-14 year olds		x		
Disabled children		x		
Parents working full-time (9am-5pm on weekdays)		x		
Parents working atypical hours (outside 9am to 5pm on weekdays)				x
Please leave this question blank if there are no rural areas in your local authority				
Children in rural areas		x		

5.4 Unregistered Provision

5.4.1 Given that the CSA is intended to map provision of childcare to meet the needs of working parents it inevitably focusses on registered childcare due to the hours offered and ability to utilise tax credits. However, the role of unregistered childcare provision is key.

5.4.2 The most pertinent use of unregistered childcare provision is traditionally by parents/carers of school-age children during school holidays. As stated in 6.3.3.3, leisure centres in particular are chosen by many families needing care during holiday periods.

5.4.3 It is worth noting considerations concerning The Child Minding and Day Care Exceptions (Wales) Order 2010 which includes the following list as long as *'any care provided to them is incidental to the provision of that coaching or tuition.'*

(a) Sport;
(b) Performing arts;
(c) Arts and crafts;
(d) School study or homework support;
(e) Religious or cultural studies

5.4.3.1 There is a case that the existence of unregistered provision that is likely to cost less than comparative registered provision will reduce the potential for registered holiday provision to be developed.

5.4.3.2 As noted by one of the umbrella organisations partners, this provision might *'undermine the viability of what holiday care already exists. There should collaboration to ensure that unregistered provision is not supported/funded which will be in direct competition with CIW registered settings. CIW registered settings comply with rigorous National Minimum Standards to safeguard children are more expensive to run and therefore cost more to parents/carers. In addition in a Clybiau Plant Cymru Kids' Clubs' survey 30% of parents/carers did not know the difference between unregistered and registered provision.'*

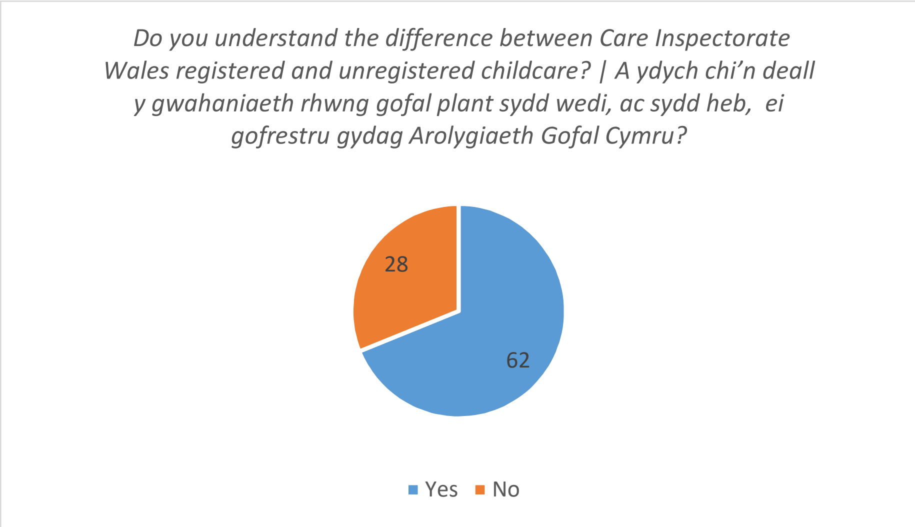
5.4.3.2 Many parents report attendance at leisure centre-based holiday clubs as a key childcare option for school-age children during holiday periods.

5.4.3.2 Whilst those parent/carers requiring childcare for a full day may not be able to select this option, holiday camps that run from 9.30am to 3pm or similar will certainly be appealing for many. Additionally, at £5 per day, they are significantly cheaper than registered childcare which would be around £25-30 for a similar length of time.

5.4.3.3 Whilst no concerns have been identified and such clubs will be required to undertake risk assessments and for staff to have relevant checks in place, given that these settings are not registered by CIW it may be beneficial for the local authority Early Years Programmes Team to work closer with them to support quality.

5.4.3.4 It must also be recognised that the existence of such clubs will make it hard for registered settings to compete for attendance from the 8-12 age group in particular as they would likely be charging a higher fee.

5.4.3.5 Notably, Clybiau Plant Cymru Kids Clubs' State of the Sector survey identified that 31% of parent/carers may not know the difference between registered and unregistered provision.



5. Supply of Childcare – Summary of Key Findings

• The most significant finding within the supply section is most likely that many of the findings appear to be impacted upon by Covid-19 and associated factors. Whether this relates to settings having large numbers of vacancies or being temporarily closed, Covid-19 appears to be a major influencing factor.
• Whilst subsequent chapters will look at parental need / demand and the impact of Covid, it is likely that we will not have a conclusive picture of supply vs demand at this time.
• However, the key finding is that the number of available places not taken up, significantly outweighs the number on waiting lists unable to attend, suggesting sufficient levels of supply overall.
• It is recognised that unregistered childcare provision offers a useful addition for parent/carers, particularly of school-age children during the school holidays. However, the lower daily rate may be problematic for registered settings to compete with and due to not being registered, it is harder to guarantee quality of care.
• However, a proportion of parents do not understand the difference between CIW registered and unregistered provision and the benefits and added safeguards for children registration brings. Additional work needs to take place to raise awareness of the benefits and to work with unregistered settings to achieve registration.

5. Supply of Childcare – Action Plan

Issue	Action	Responsible	Timescale	Outcome
5.1 Perceived over-supply may be due to Covid	Need to annually monitor vacancies to determine whether	LA	3/23	Determine level of supply
5.2 Potential that unregistered holiday provision may impact on registered provision's opportunity to provide care	5.2 Ensure funding is not allocated to unregistered provision where CIW registered holiday care already exists	LA & Partners	March 24	Registered provision is not losing out to cheaper unregistered care
5.3 Unregistered nature of holiday activity clubs	5.3 Closer engagement with	LA / Partner Organisations	Ongoing	Increased relationship for mutual benefit

means quality and good practice is harder to determine	unregistered holiday provision 5.3 Encourage registration and support to obtain qualifications			Potential to monitor practice
5.4 Many parents are unfamiliar with the difference between registered and unregistered settings	5.4 Increased understanding of the benefits of CIW registered provision	LA & Partners	March 23	Parents better advised to make decisions
5.5 22% of settings stated that they were unable to care for 'non-English/Welsh' children.	Additional assessment to determine what is meant and action as appropriate	LA	March 23	Clearer picture obtained and response as appropriate

6. Needs of Parents/Carers (Demand for childcare)

6.1 Requirements

6.1.1 There is a requirement to include information on the number of childcare places required for children up to the age of 18 broken down by age range and types as below and as specified in the Childcare Statutory Guidance (2016)

6.1.2 This must include each of the following;

- Childminder
- Full Day Care
- Sessional Day Care
- Crèches
- Out of School Care
- Open Access Play Provision
- Nanny

6.1.3 As per the Childcare Statutory Guidance (2016), it is essential to include information about;

- the number of full and part time spaces required
- the number of childcare places required in which the childcare costs element of the working tax credit or universal credit may be claimed
- the number of childcare places required for which parents may claim employer supported childcare or tax free childcare

- the number of childcare places required for children who have special educational needs or require specialist care due to a disability
- demand for Childcare Offer places in addition to Foundation Phase Nursery and Flying Start
- the requirements for Welsh medium childcare or childcare provision in other languages
- the times at which childcare is required, including demand for flexible childcare that caters for irregular patterns of usage across the day, the week and the year

6.1.4 When considering current and future demand there is a recognition that some elements of future demand may need to be based on trends given uncertainty post Covid-19.

6.2 Data Capture / Methodology

6.2.1 The primary source of data capture was the Parental Survey developed by Welsh Government. This survey provided some very useful findings. The sample size of 187 is relatively good for such a survey and allows for trends and comparisons, although equally it should be noted that this equates to around 5% of families of children of childcare age being represented.

Consultation\2022 Surveys\WG Parent Carer survey.htm

6.2.2 Additionally, it was appropriate to incorporate findings from Swansea's own childcare survey undertaken during the 20/21 year.

6.2.3 Given the fact that the Family Information Service (FIS) will regularly receive enquiries and requests in relation to childcare needs identified by parents/carers, a summary of enquiries was a key element of the findings.

6.2.4 Additional surveys, such as the 'State of the Sector' survey developed by Clybiau Plant Cymru Kids Clubs, were able to be incorporated. These proved particular useful for either corroborating or challenging findings.

6.3 Findings

6.3.1 About those Requiring Childcare

6.3.1.1 It is important to get a picture about the make-up of those requiring childcare. This includes their care responsibilities, numbers and ages of children, and what their childcare requirements relate to.

6.3.1.2 82% of respondents identify as sharing parenting with someone they live with.

Which of the following best describes your household? Please tick all that apply:			Response Percent	Response Total
1	I have sole responsibility for my children		11.76%	22
2	I share responsibility for my children with someone I live with		82.35%	154
3	I share responsibility for my children with someone I don't live with		10.16%	19
4	I am a parent to be		1.60%	3
5	I am a foster carer		0.00%	0
6	I am a grandparent		0.00%	0
7	Other (please explain):		0.53%	1
			answered	187
			skipped	0

6.3.1.3 In terms of employment status, the vast majority list themselves as employed. *(Note the percentages shown are not a comparison of employment status types)*

What is your current status? Please tick what best describes you:	You	Your Partner (if applicable)	Response Total
Looking for a job but not working yet	72.7% (8)	27.3% (3)	11
Employed	56.3% (170)	43.7% (132)	302
Self-employed	32.0% (8)	68.0% (17)	25
In education or training	72.2% (13)	27.8% (5)	18
Not working and not looking for a job	66.7% (2)	33.3% (1)	3
Unable to work	57.1% (4)	42.9% (3)	7
		answered	187
		skipped	0

6.3.1.4 In terms of household weekly income, the most frequent range selected was £750 to £999, followed by £581 to £750. Note, these figures are before tax. Additionally, note the comparison with this and the average weekly childcare costs in **6.*.*.***

What is your gross household income per week (before deductions/tax)? Please add together the incomes of yourself, your partner and anyone else who lives with you. In addition to wage or salary income, don't forget to include any benefits you receive, income from savings and investment, and any other sources of income.			Response Percent	Response Total
1	up to £100		0.00%	0
2	£100 to £149		0.55%	1
3	£150 to £249		2.20%	4
4	£250 to £349		10.99%	20
5	£350 to £499		12.64%	23
6	£500 to £580		10.44%	19
7	£581 to £750		19.23%	35
8	£750 to £999		21.43%	39
9	More than £1,000		14.84%	27
10	Prefer not to say		7.69%	14
			answered	182
			skipped	5

6.3.1.2 The survey responses include a cross-reference of all ages up to 17. Notably, some classifications include age ranges, e.g. 5 to 8, rather than single years, so it can be assumed that the greatest response was for those with children aged 2 and under.

What are the ages of your child(ren)? Please tick all that apply			Response Percent	Response Total
1	Under age 2		36.90%	69
2	Age 2		33.69%	63
3	Age 3		17.65%	33
4	Age 4		13.37%	25
5	Age 5 to 8		39.57%	74
6	Age 9 to 11		17.11%	32
7	Age 12 to 17		13.37%	25
			answered	187
			skipped	0

6.3.1.2 It is particularly pertinent if the family identify one or more child with an additional need or disability, as previous assessments, and additional consultation and feedback, have suggested some parents feel their child's needs may not be fully met.

Do any of your children have a disability or a long-term illness?			Response Percent	Response Total
1	Yes		9.09%	17
2	No		90.37%	169
3	Prefer not to say		0.53%	1
			answered	187
			skipped	0

6.3.1.3 12% of respondents have stated that one of more of their children has an additional need requiring support – *note, this does not automatically translate to 12% have an additional need, but 12% of families have a child with support needs, i.e. the number of children is likely to be lower than 12% due to the likelihood of most families having multiple children.*

Do any of your children have a special education need / additional learning need (they need additional support with their learning)?

			Response Percent	Response Total
1	Yes		11.76%	22
2	No		87.70%	164
3	Prefer not to say		0.53%	1
			answered	187
			skipped	0

6.3.2 Current Use of Childcare Provision

6.3.2.1 It is important to develop a picture of current childcare use – what type, how often, why chosen, etc. The most popular 'type' selected during term-time was informal childcare from friends and family, followed by private day nurseries.

Do you currently use any of the following types of childcare or early education DURING TERM TIME (Please tick all that apply)?

			Response Percent	Response Total
1	Childminder		12.43%	23
2	Before School Club/Breakfast Club		24.32%	45
3	After School Club		21.08%	39
4	Private Day Nursery		47.03%	87
5	School Nursery		9.19%	17
6	Playgroup		3.24%	6
7	Cylch Meithrin		7.57%	14
8	Drop Off Crèche		2.16%	4
9	Nanny		0.00%	0
10	Au Pair		0.00%	0
11	Family / friends (paid)		5.41%	10
12	Family / friends (unpaid)		50.81%	94
13	None During Term Time		8.11%	15
14	Other (please explain):		1.62%	3
			answered	185

Do you currently use any of the following types of childcare or early education DURING TERM TIME (Please tick all that apply)?	Response Percent	Response Total
	skipped	2

6.3.2.2. This increases, if not dramatically, when considering school holidays to 58% using friends and family rather than 51%, suggesting that for shorter term care requirements, i.e. up to 6 weeks of summer holidays, families are more likely to revert to family and friends. This may be impacted by the probability that children are likely to be older.

Do you currently use any of the following types of childcare or early education DURING SCHOOL HOLIDAYS? (Please tick all that apply):

			Response Percent	Response Total
1	Childminder		12.28%	21
2	Holiday Care		8.77%	15
3	Private Day Nursery		51.46%	88
4	Pre-Prep (Private) School		0.00%	0
5	Playgroup		2.92%	5
6	Cylch Meithrin		0.00%	0
7	Drop Off Crèche		1.17%	2
8	Nanny		0.00%	0
9	Au Pair		0.00%	0
10	Playscheme		7.60%	13
11	Family / Friends (paid)		4.68%	8
12	Family / Friends (not paid)		58.48%	100
13	None During School Holidays		11.11%	19
14	Other (please explain):		4.09%	7

6.3.3.3 Notably, under 'other' the holidays see families looking to sports and activity clubs as providing childcare, most likely for older, school-age, children. Comments listed included;

- Sports clubs and science camps as there is limited , if perhaps no provision other than day nurseries
- Leisure centre sports club for my 10yr old
- I will need to use a day nursery when I return to work
- Leisure centre sports club
- Cylch doesn't run during school holidays. Can't afford any of the others

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6.3.3.4 Parental survey findings show a heavy reliance on unpaid informal care from family & friends, yet saying this is NOT the preferred option.

6.3.1.2 The 20/21 Parent/Carer Survey asked what childcare provision is used;

- *82% (9 of 11 who responded) stated they generally use CIW registered childcare*

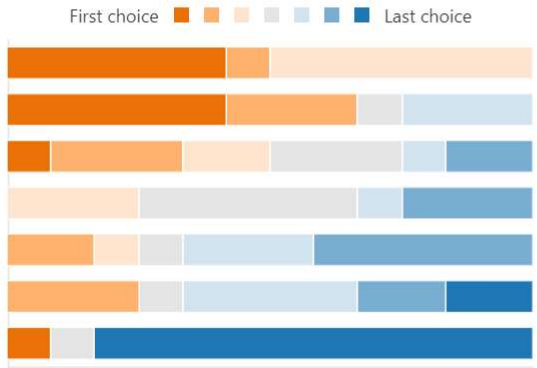
- *92% (11 of 12) use registered childcare during term-time and holidays as opposed to one or the other*

6.3.1.3 When considering childcare, the most important factors are;

(Rank in order with the most important first)

More Details

Rank	Options
1	Opening times
2	Close to home
3	Choice of activities
4	Price
5	Close to work
5	Able to accommodate all ages
6	Other (please state)



6.3.1.4 Given how subsequent engagement has consistently shown that cost of childcare is the number one issue faced by parents/carers, it is interesting that in terms of importance, price is lower on the priority list than opening times, close to home and choice of activities.

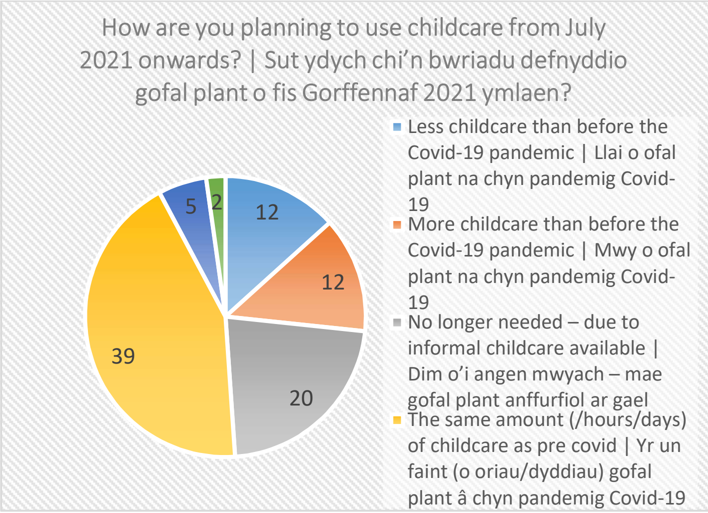
6.3.1.5 75% (9 of 12) felt they had sufficient childcare available to suit their needs. Comments on this were;

- *'While working from home we can manage with the children home as our normal childcare is not available'*
- *'Now I do, however March to September 2021 I didn't. I had a newborn and a toddler who was supposed to still go to childcare while I was on maternity. He wasn't able to go back until September as it wasn't essential'*
- *'lack of holiday cover and after school care'*
- *'Currently it is ok, however I'm expecting my second and in October I will be job hunting again. I think I will then struggle'*
- *'Good quality childcare'*
- *'Only need care for my 3 year old until he starts school full time'*
- *'Nursery and childminder'*

6.3.1.6 Clybiau Plant Cymru Kids Clubs' State of the Sector Parents' Survey identified that, in Swansea, there was a fairly consistent level of childcare needs as of July 2021. Almost 40% felt they would need the same level of pre-Covid, 12% requiring less and 12% requiring more thus cancelling each other out, and 20% saying it was no longer needed due to informal care.

As a follow-up to this, it was suggested that consideration also needs to be given to the fact that as parents start returning to the workplace even within a hybrid model, demand may rise again.

This finding does differ from other research which suggests that overall requests for formal childcare have reduced, although the timing of the research may be significant as it compares pre-July 21 to post-July 21, i.e. both periods affected by Covid.



6.3.1.7 In terms of choice, it is noteworthy, given how few respondents feel they are unable to access childcare locally, that 91 of 187 respondents disagreed to varying degree that there was a good choice of childcare locally – with perhaps 'choice' being significant. The suggestion being that most can access childcare, just perhaps feeling there isn't as wide a choice as they would like.

	26.4. There is a good choice of childcare in my area	**Response Percent**	**Response Total**
1	Strongly Agree	10.7%	20
2	Tend to Agree	36.4%	68
3	Tend to Disagree	24.1%	45
4	Strongly Disagree	24.6%	46
5	N/A	4.3%	8
		answered	187

6.3.1.8 This is accompanied by information which suggests that most feel childcare is well located, suggesting that the responses in Q 26.4 are questioning the level of choice, rather than their ability to access childcare. Less than 10% strongly disagree that childcare is well located, although this in itself could be believed to require addressing.

26.5. Childcare is well located			Response Percent	Response Total
1	Strongly Agree		25.3%	47
2	Tend to Agree		38.7%	72
3	Tend to Disagree		17.7%	33
4	Strongly Disagree		9.7%	18
5	N/A		8.6%	16
Statistics	Minimum 1; Mean 2.38; Std. Deviation 1.2; Satisfaction Rate 34.41	Maximum 5; Variance 1.45; Std. Error 0.09	answered	186

6.3.2 A reassuring statistic from the survey is that over 60% of respondents (removing the 7.56% of N/A) were very satisfied with their current provider with only 7 of 172 stating they were dissatisfied.

How satisfied are you with your current childcare provider?			Response Percent	Response Total
1	Very Satisfied		57.56%	99
2	Quite Satisfied		30.81%	53
3	Quite Dissatisfied		2.91%	5
4	Very Dissatisfied		1.16%	2
5	Not applicable		7.56%	13
Statistics	Minimum 1; Mean 1.7; Std. Deviation 1.12		answered	172
	Maximum 5; Variance 1.24; Std. Error 0.09		skipped	15

6.3.2.1 There is a noticeable reduction in levels of satisfaction when differentiating between term-time and holiday provision, with the latter appearing less appropriate. Overall. However, levels of satisfaction are high.

26.1. I am satisfied with my childcare in term time			Response Percent	Response Total
1	Strongly Agree		41.4%	77
2	Tend to Agree		34.9%	65
3	Tend to Disagree		6.5%	12
4	Strongly Disagree		4.3%	8
5	N/A		12.9%	24
			answered	186

26.2. I am satisfied with my childcare in school holidays			Response Percent	Response Total
1	Strongly Agree		31.7%	59
2	Tend to Agree		28.0%	52
3	Tend to Disagree		11.3%	21
4	Strongly Disagree		10.2%	19
5	N/A		18.8%	35
			answered	186

This doesn't, however, indicate whether the provision they use in holidays is unregistered such as leisure centres etc or registered childcare.

6.3.2.2 Consistent with other findings, being 'more affordable' is the most stated way that parents/carers would be satisfied with their childcare arrangements. Interestingly, 'better quality provision' is selected several times, but the key statistic is probably that 180 of 187 skipped this question, which suggests quality of provision is not a concern.

It is worth noting that no respondent felt unhappy with meeting their child's ALN when 17 responses (above) said yes they had a child with ALN (no 9 on table below)

If you are unhappy with a certain aspect of your childcare arrangements, please tell us how it could be improved:			Response Percent	Response Total
1	More hours available (setting is too busy /full)		42.86%	3
2	Extend opening hours - early mornings		28.57%	2
3	Extend opening hours – evenings		42.86%	3
4	Extend opening hours – to cover weekend		0.00%	0
5	Extend opening hours – overnight care		0.00%	0
6	More flexible sessions (ad hoc care)		14.29%	1
7	More affordable		57.14%	4
8	Different location		0.00%	0
9	Childcare that is better at meeting my child's additional learning needs		0.00%	0
10	Better quality provision		42.86%	3
11	No improvements needed		0.00%	0
12	Other (please explain):		14.29%	1
			answered	7
			skipped	180

Notable comments under 'other' include;

'I'd prefer a childminder with smaller numbers of children but none available in our area'.

In terms of reliability of childcare arrangements, less than 17% agreed, to varying degrees, that their childcare option can be unreliable which causes problems. It is unfortunate that this does not detail what type of care this relates to as 17% of formal childcare being unreliable would be a concern, but this may relate to informal care.

26.10. I have a problem with childcare arrangements that are unreliable (eg. cancel sessions at short notice)_			Response Percent	Response Total
1	Strongly Agree		7.0%	13
2	Tend to Agree		9.7%	18
3	Tend to Disagree		21.1%	39
4	Strongly Disagree		26.5%	49
5	N/A		35.7%	66
			answered	185

6.3.2.3 In terms of whether childcare is appropriate for their child's needs, 29 of 187 respondents disagreed. Unfortunately, the findings do not allow respondents to state why they feel this, but it is fair to make an assumption that some of these will relate to a view regarding an additional need or disability. Other options could relate to the child's age.

26.6. Childcare caters for my children's needs			Response Percent	Response Total
1	Strongly Agree		36.4%	68
2	Tend to Agree		34.2%	64
3	Tend to Disagree		7.5%	14
4	Strongly Disagree		8.0%	15
5	N/A		13.9%	26
			answered	187

6.3.2.4 Over 50% of respondents felt they would like their child to attend more registered childcare. The suggestion being that they are accessing either unregistered or informal childcare, e.g. friends and family. This finding is consistent with other parental preferences which suggest a desire to attend a particular childcare type which doesn't always manifest in reality.

26.7. I would like my child to attend more registered childcare			Response Percent	Response Total
1	Strongly Agree		31.2%	58
2	Tend to Agree		24.2%	45
3	Tend to Disagree		14.0%	26
4	Strongly Disagree		5.4%	10
5	N/A		25.3%	47
Statistics	Minimum 1; Mean 2.69; Std. Deviation 1.57; Satisfaction Rate 42.34		answered	186
	Maximum 5; Variance 2.46; Std. Error 0.12			

6.3.3 Over 60% of respondents stated that they expected to require more childcare over the next couple of years. On the face of it, that suggests an increased demand for childcare, although this needs to be caveated with the high number of respondents who identified their children were aged under 2 which suggests this is the main reason.

Do you anticipate you will need more or less childcare in the next couple of years?			Response Percent	Response Total
1	More		61.50%	115
2	Stay the same		20.86%	39
3	Less		12.83%	24
4	Don't know / Not sure		4.81%	9
			answered	187
			skipped	0

6.3.3.1 As anticipated, most of those expecting childcare needs to reduce identify this as being due to children getting older. *Notably, only 2 of the 24 respondents identify expecting to work/study from home more as a reason for needing less childcare. Given the recent increase in home working, a reduction in childcare needs was considered likely.*

You mentioned you will be using less childcare, why is this? Please tick all that apply

		Response Percent	Response Total
1	Child will be older	100.00%	24
2	Expect to work / study less hours	0.00%	0
3	Expect to work / study from home more	8.33%	2
4	Trying to have more time with family	4.17%	1
5	Concerns around COVID-19 / infections	0.00%	0
6	Concern about COVID-19 disruption to services / closure	4.17%	1
7	Other (please specify):	8.33%	2

Statistics								
	Minimum	1	Mean	1.8	Std. Deviation	1.78	answered	24
	Maximum	7	Variance	3.16	Std. Error	0.32	skipped	163

6.3.3.2 Where parent/carers felt they would be using more childcare in the coming years, it is worth noting that unpaid family and friends appear the 4th most popular choice of childcare behind breakfast club, after school club and private day nursery.

6.3.3.3 If you were to compare this to the table in 6.3.1.2 where 'actual' childcare puts friends and family significantly ahead, there may be a suggestion that parents intend for their children to access formal childcare, then the reality is using more informal care.

You mentioned you will be using more childcare, what type of care or early education do you anticipate using more of in the next couple of years? Please tick all that apply

		Response Percent	Response Total
1	Childminder	22.61%	26
2	Before School Club/Breakfast Club	55.65%	64
3	After School Club	55.65%	64
4	Private Day Nursery	60.87%	70
5	School Nursery	35.65%	41
6	Playgroup	8.70%	10
7	Cylch Meithrin	19.13%	22
8	Drop Off Crèche	5.22%	6
9	Nanny	0.87%	1
10	Au Pair	0.00%	0
11	Pre-Prep (Private) School	0.00%	0
12	Holiday club	21.74%	25
13	Family / friends (paid)	7.83%	9
14	Family / friends (not paid)	46.09%	53
15	Not applicable	0.87%	1
16	Other (please explain):	0.87%	1

Statistics								
	Minimum	1	Mean	5.83	Std. Deviation	4.38	answered	115
	Maximum	16	Variance	19.16	Std. Error	0.22	skipped	72

6.3.3.4 The summary questions within the parental survey suggest an overall level of satisfaction with a clear consensus that the quality of provision is high. Yet, notably, less respondents felt the choice of childcare to be good.

It is an interesting consideration as to how much thought needs to be given to the question of choice, i.e.;
If families overall feel they are limited in their choice of childcare, but what they can access is high quality and meets their needs, to what extent should there be efforts to increase the level of choice?

Thinking about all the childcare you use for your children, or are aware of, how much do you agree with the following statements:						
	Strongly Agree	**Tend to Agree**	**Tend to Disagree**	**Strongly Disagree**	**N/A**	**Response Total**
I am satisfied with my childcare in term time	41.4% (77)	34.9% (65)	6.5% (12)	4.3% (8)	12.9% (24)	186
I am satisfied with my childcare in school holidays	31.7% (59)	28.0% (52)	11.3% (21)	10.2% (19)	18.8% (35)	186
The quality of childcare is high	44.6% (83)	35.5% (66)	5.4% (10)	2.2% (4)	12.4% (23)	186
There is a good choice of childcare in my area	10.7% (20)	36.4% (68)	24.1% (45)	24.6% (46)	4.3% (8)	187
Childcare is well located	25.3% (47)	38.7% (72)	17.7% (33)	9.7% (18)	8.6% (16)	186
Childcare caters for my children's needs	36.4% (68)	34.2% (64)	7.5% (14)	8.0% (15)	13.9% (26)	187
I would like my child to attend more registered childcare	31.2% (58)	24.2% (45)	14.0% (26)	5.4% (10)	25.3% (47)	186
Childcare is too expensive	78.6% (147)	13.4% (25)	3.7% (7)	1.6% (3)	2.7% (5)	187
I would prefer to use family/friends for childcare	15.1% (28)	21.5% (40)	30.1% (56)	11.3% (21)	22.0% (41)	186
I have a problem with childcare arrangements that are unreliable (eg. cancel sessions at short notice)_	7.0% (13)	9.7% (18)	21.1% (39)	26.5% (49)	35.7% (66)	185
Childcare is a barrier to me accessing employment or training	31.5% (58)	21.2% (39)	12.5% (23)	9.2% (17)	25.5% (47)	184
I know where to find out information about childcare	22.6% (42)	31.7% (59)	26.3% (49)	12.9% (24)	6.5% (12)	186
I know where to find out info on financial assistance for childcare	11.8% (22)	25.1% (47)	32.1% (60)	26.7% (50)	4.3% (8)	187
					answered	187
					skipped	0

6.3.3.6 The Welsh Government Parental Survey concluded by asking if there were any specific issues finding childcare for one or more of their children. Notably, 102 of the 187 respondents gave a specific response to this. All responses have been logged and noted, but the following were identified as particularly noteworthy;

- *'The cost of the childcare is way too expensive for working parents who live together, especially with more than 1 child. It stops one of the parent to take up a legal job, especially mothers. Cost of the childcare during school holidays is insane! 2 x school age plus a toddler is more than £100 a day!!!! When you want a well paid job, first steps after maternity leave is to find training and then experience, which usually leads to being paid minimum wage which won't pay for childcare during half terms, when you consider a family has bills to pay. That's why Swansea is a graveyard for ambitious parents'*

- ‘I am a single parent and the fact that the local primary school ran a pre-breakfast club and after school club is the sole reason I have been able to work full time and progress in my career. It has been invaluable to me. An absolute god send. I actually moved my daughter to this school for that reason.’
- ‘No private nursery within walking distance of house despite having 4 primary schools within walking distance. This means we have no choice but to drive into work and drop son off on way.’
- ‘There is a lack of childcare for secondary school age children. There is no facility that can allow parents to work a full time job whilst also trying to get the child to the secondary school. There is no provision for 11- 14 year olds in Swansea.
There is a lack of school holiday clubs that run long enough to allow a full days work’
- ‘It’s extremely costly there is no funding before age 3 for working parents that don’t claim benefits and thereafter the 30hrs free scheme is a lie because its worth a value and often doesn’t cover the costs and you end up with half of the 30hrs in private settings’
- ‘There is very limited childcare available for shift workers.’

- ‘There is childcare available but it's not accessible for those on a minimum wage or part time.’
- ‘Me and my partner work till late evening hours so the most difficult for us was found nursery where we can leave our son at list till 6.30-7pm. Cost of private nurseries are really high’
- ‘The breakfast club does not start early enough, I am always late for work. The after school clubs* are constantly being cancelled, it is for this reason, I try to get extended family to collect from school instead of using the clubs. I work full time. My youngest child is in paid for nursery, I try to keep this to a minimum because it is so expensive. I have 3 children, two different fathers, I have no financial help and very little childcare help from one of them, the other I have no financial help but a lot of childcare help from. Childcare arrangements is the biggest stress of my life and if were cheaper, I would use it a lot more’
- ‘I work shifts, it was difficult to find somewhere that could accommodate different days a week.’
- ‘The cost of childcare was a barrier to full time work and the inflexibility and time commitments needed mean I have had to find a new job that is more structured and doesn’t involved shift work’
- ‘I have a disabled child, aged 16, and there is zero childcare provision for him. He has profound physical and learning disabilities and is a wheelchair user. My husband cannot work because we have no childcare for school holidays for our son and he needs 1:1 care 24/7’
- ‘I was quoted £65 a day to look after my little boy, which isn't far off what i earn after tax. Once I pay fuel and parking, I'm actually worse off working if I had to pay for childcare.’
- ‘It’s understanding what is available, for when your child is aged 2/3 up some can go to nursery at school for morning or afternoon but it not really clear what is required ie some can go from age 2 and other 3 onwards. And it’s hard to know what finding is out there to support you.’
- ‘I work for the nhs and no childcare setting starts early enough or ends late enough-I really struggle. I want to go to uni to further my career but cannot due to no family help and no childcare’
- ‘I would love access to a cylch in my area as my older children go to welsh medium school and my baby boy won’t have access to Welsh medium childcare when I go back to work as I will have to pay for private nursery and grandparents.’
- ‘No one caters for children who have experienced trauma, have ADHD or MH problems’.
- ‘It is difficult to understand how to apply for financial help to pay for childcare and the financial support for when your child is under the age of 3 is hugely insufficient and has prevented both my partner and training or working at various times.’
- ‘All summer holiday provision has opening hours that are way too short for someone who is working a full day’
- ‘My daughter is 3 and we now use the 30 free hours for her which is amazing. We are so grateful for this support. For my son I do feel anxious as it'll be another 2+ years until we can apply for that. We cannot afford to put him in nursery a 3rd day a week which ideally would cover most of my working hours as that would cost us £672 a month which we simply can't afford. We have to rely on family for support which is difficult.’
- ‘

6.3.3.7 Additionally, there were many references to prohibitive costs and lack of school pick-up services.

If you do not access any childcare, please tick the reason(s) why:		Response Percent	Response Total
1	My child is on a waiting list for a provider and we are waiting for a place to become available	0.00%	0
2	I use informal childcare such as a family member or friend	37.68%	26
3	I choose not to access any childcare	2.90%	2
4	I am a stay at home parent and have no need for childcare	5.80%	4
5	My children are old enough to look after themselves	5.80%	4
6	There is no childcare with sufficient quality	8.70%	6
7	There is no suitable Welsh Language provision	4.35%	3
8	No suitable provision in our language, which is neither Welsh nor English	0.00%	0
9	The childcare available is not flexible enough for my needs	18.84%	13
10	The cost of childcare is too expensive	65.22%	45
11	Childcare times are unsuitable	11.59%	8
12	There is no childcare available that is suitable for my child's age	5.80%	4
13	There is a problem with transport	7.25%	5
14	There is no childcare where I need it to be	10.14%	7
15	There is no childcare that can cater for my child's specific needs	10.14%	7
16	I only use childcare on an ad hoc basis and it is impossible to plan	8.70%	6
17	Other (please explain):	13.04%	9
		answered	69
		skipped	118

Where 'other' was indicated, the responses were as follows;

- *I am the childcare as I am a childminder.*
- *Currently having to find childcare due to change in work commitments but the cost is too high*
- *Expensive*
- *I will use a day nursery when I return to work in January 2022 from maternity leave*
- *My 8 yo attends childcare, teenagers don't*
- *Will use after school club but school has still not re started this even though all other schools in area have.*
- *I am working from home so i can collect her.*
- *I have to select an English childminder as there are no Welsh nurseries or childminders in the area which is very disappointing as we are a Welsh speaking family*
- *i work school hours*

6.3.4 Preferred Medium

6.3.4.1 Of 117 respondents, 26 stated that they accessed childcare through the medium of Welsh – a figure of 22%, which is higher than the proportion of childcare settings which deliver Welsh medium provision.

Do you access childcare through the medium of Welsh?				
			Response Percent	Response Total
1	Yes		22.22%	26
2	No		75.21%	88
3	Unsure / do not know		2.56%	3
Statistics	Minimum 1, Maximum 3	Mean 1.8, Variance 0.21, Std. Deviation 0.46, Std. Error 0.04	answered	117
			skipped	70

6.3.4.2 Of those 91 who stated they do not currently access childcare through Welsh medium (including 3 unsure/don't know), 16 stated they would like to access via Welsh, with a further 26 responding 'maybe'. Put another way, over half of respondents stated they either currently or would like to /potentially like to access Welsh provision.

If no, would you like to access childcare through the medium of Welsh?				
			Response Percent	Response Total
1	Yes		17.58%	16
2	Maybe		25.27%	23
3	No		51.65%	47
4	Don't know		5.49%	5
Statistics	Minimum 1, Maximum 4	Mean 2.45, Variance 0.71, Std. Deviation 0.84, Std. Error 0.09	answered	91
			skipped	96

6.3.4.3 Noticeably, being able to access Welsh medium provision appeared the biggest barrier or influencing factor, with distance and availability being most selected answers – availability selected by 77% of respondents, which suggests a lack of provision, however, noting that only 35 of 187 chose to answer this question.

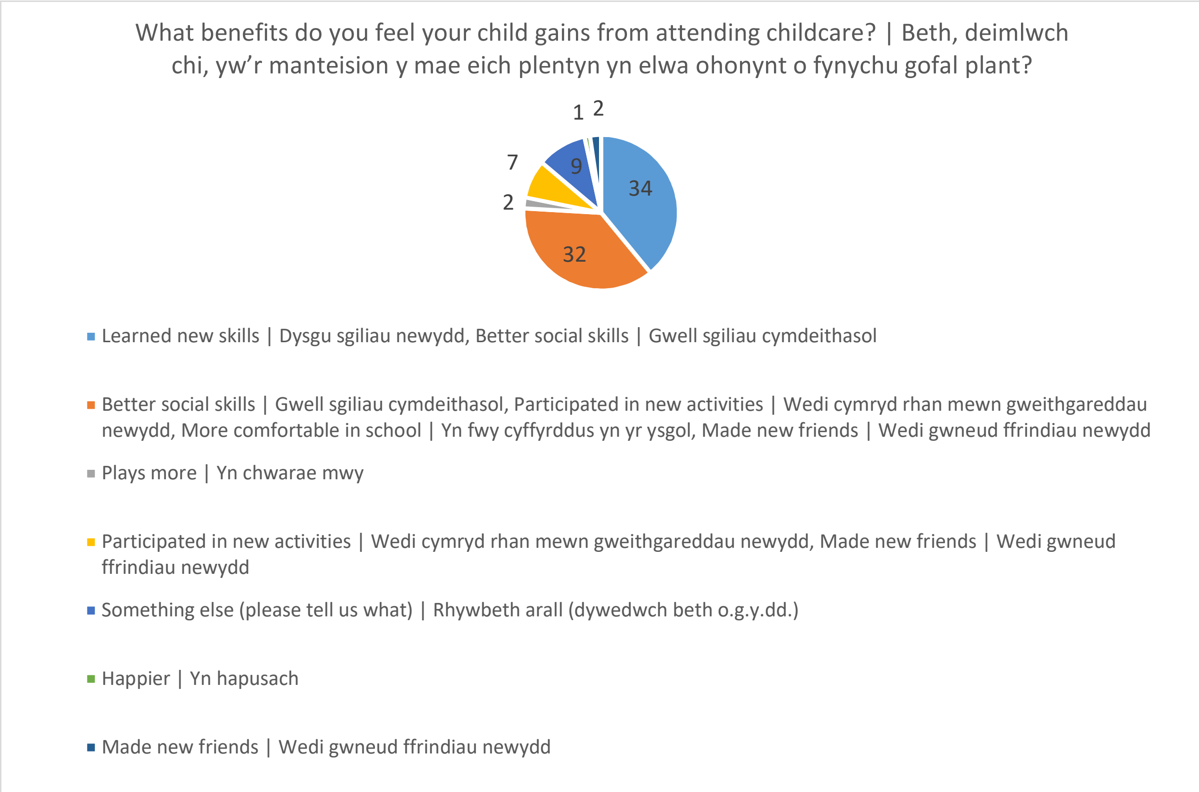
You told us you are not using Welsh medium childcare, but you might like to. What issues do you face accessing Welsh medium childcare? Please tick all that apply				
			Response Percent	Response Total
1	Distance		40.00%	14
2	Availability		77.14%	27
3	Quality of Care		5.71%	2
4	Staff language capability		22.86%	8
5	Cost		14.29%	5
6	Insufficient hours of care		8.57%	3
Statistics	Minimum 1, Maximum 6	Mean 2.53, Variance 2.11, Std. Deviation 1.45, Std. Error 0.19	answered	35
			skipped	152

Specific comments in response to this question were;

- *He speaks Welsh when in the care of his grandmother 3 days a week. In English speaking nursery 2 days a week. Both parents are not fluent in Welsh.*
- *My eldest attends welsh medium education, only welsh medium daycare I know of is in Carmarthen University which was 45 mins away . Which has now closed.*

- *My child will be attending the Cylch in January*
- *I need it to be local and there's none locally*

6.3.5 Clybiau Plant Cymru Kids Clubs' State of the Sector parents' survey asked what benefits parent/carers feel their child gets from attending. Whilst only being able to select one option, it is notable that over 1/3 of responses related to both learning new skills and better social skills. Only one answered 'happier', with a far higher 7 selecting 'something else' most of whom added 'none' to explain what.



6.3.6 Costs of Childcare

6.3.6.1 By some distance, cost of childcare is the number 1 area that parents/carers are concerned about *(95% of responders felt it was too expensive)*

6.3.6.2 In terms of how much families spend per week on childcare, the most frequently selected amount was £100-£199. There is a useful comparison with the table in section 6.3.1.4 of average weekly household income. With the most frequently selected ranges of £750 to £999 for income and £100 to £199 for childcare costs, a basic estimation of percentage of weekly income going to childcare is between 13% and 20%. Although as a percentage of take-home pay, it is likely to be closer to 25%-30%.

How much on average do you pay per week for your childcare (not including government funded childcare)?				
			Response Percent	Response Total
1	£0		14.12%	24
2	1p - £10		2.35%	4
3	£10 - £49		17.06%	29
4	£50 - £99		17.06%	29
5	£100 - £199		32.94%	56
6	£200 - £299		8.24%	14
7	£300+		8.24%	14
			answered	170
			skipped	17

6.3.6.3 However, 99 of the 187, i.e. more than half, identified support towards the cost of childcare. Given that 2 thirds of these identify 'childcare vouchers / tax free childcare' it is likely that this includes 30 Hour funding.

Do you receive any other help towards the cost of childcare? Please tick all that apply:				
			Response Percent	Response Total
1	Childcare element of the Working Tax/Universal Credit		22.22%	22
2	Childcare vouchers / Tax free childcare		68.69%	68
3	Childcare Grant for Students		2.02%	2
4	Employer contribution		1.01%	1
5	Other (please say):		14.14%	14
			answered	99
			skipped	88

Where respondents stated 'other', the following comments were made;

- *30 hours*
- *£70 maximum entitlement*
- *Accept all of the above through my childminding business*
- *Erratically receive UC help, some months I earn a bit more sometimes less, UC doesn't look at whole tax year which makes it very anxiety ridden to know if we'll get help one month. Very often I work just to pay childcare:*
- *NONE- I have no choice but to take loans out.*
- *Adoption allowance*
- *Not sure what it's called. One of the first two options*
- *Direct payments for disabled child*

Summary of Key Findings

• Over 60% of parent/carers state they do not know how to access support towards childcare costs
• Over half of Swansea parent/carers responded that childcare was a barrier to employment or training
• 91% of respondents felt quality of childcare was high
• Yet less than half felt there was a good choice of childcare in their area
• *The response from BAME families is significantly lower than would be expected from a representative sample*

6.3.7 Childcare Costs

6.3.7.1 Based on information provided by the sector, the average cost for a childcare full day place is **£38.37**. However, this is the overall average covering all full day provision, which includes all registered provision therefore the results are likely to have been 'skewed' by some extremities.

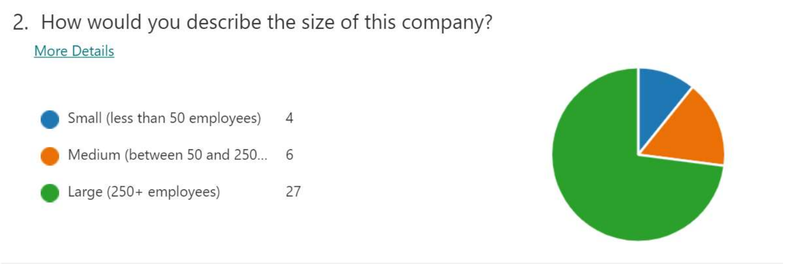
6.3.7.2 For those charging an hourly rate, £5 per hour is consistently set as the rate.

6.3.7.3 Most full day care settings offer a full day or half day rate. It is noted that in several incidences where parental need differs from standard morning and afternoon timings, e.g. require 12-5 when mornings are 8-1 and afternoons are 1-6, the setting charges the full day rate. Whilst understandable where it would prevent a morning children from attending, this will be prohibitive to some.

6.3.7.4 Given that parent/carers report cost as the primary barrier, the rate is significant.

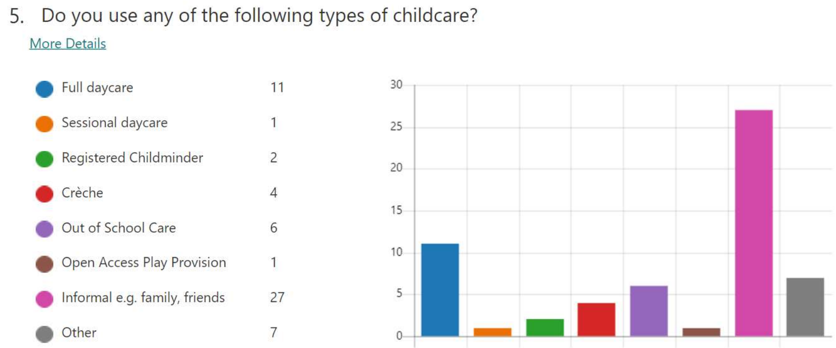
6.3.8 Childcare & Employment

6.3.8.1 Swansea's additional employee focussed survey identified additional views and requirements in relation to a work role. Notably, almost ¾ of respondents were from large employers.

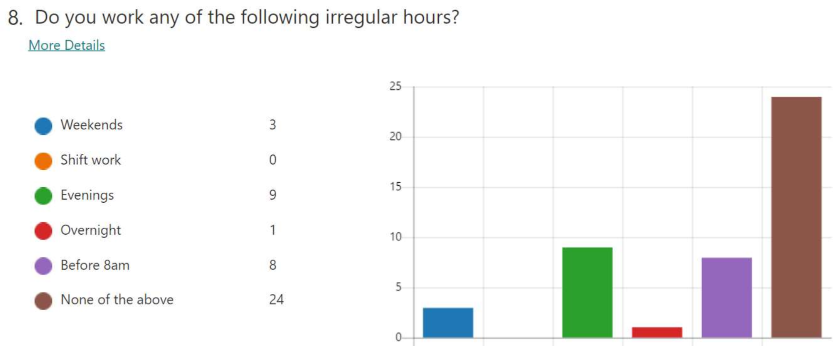


6.3.8.2 When asked to state their job role, the vast majority were administrative which is in keeping with the information obtained in section 9 Population.

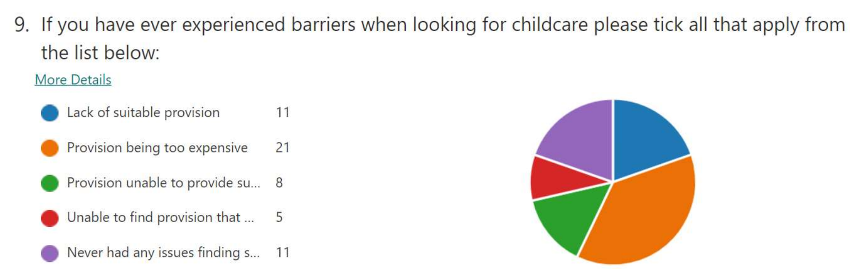
6.3.8.3 Responses to types of childcare used also echoed similar surveys, with ‘informal e.g. family, friends’ almost outweighing all others combined. ‘Other’ accounted for 12% of responses which would benefit from further analysis.



6.3.8.4 Additionally, the findings reflected the response that most are working traditional hours with some working prior to 8am or in the evenings. Notably, none of the respondents undertook shift work which suggests an additional survey canvassing this group would be beneficial.



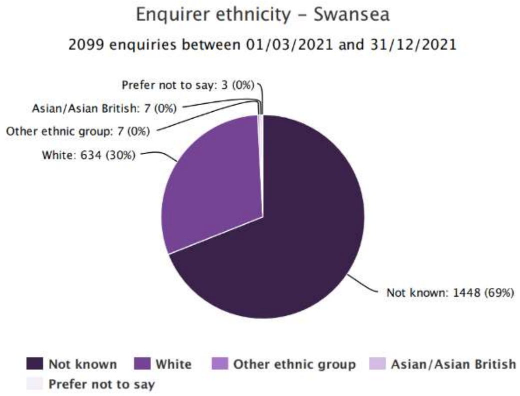
6.3.8.5 Consistent with other surveys, cost of childcare was comfortably the most frequently stated barrier, although almost 20% stated a lack of suitable provision.



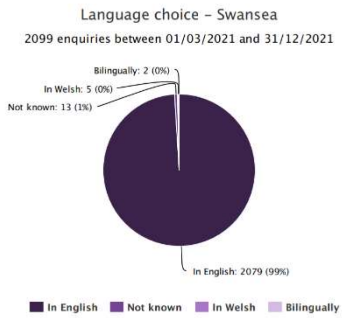
6.4 Information

6.4.1 A key element of assessing parental need is via enquiries logged with the Family Information Service (FIS). From March 2021, each enquiry was registered on Dewis which provided a useful overview of both those who were enquiring and what their enquiries related to.

6.4.1.1 Whilst the majority of enquirers did not have their ethnicity identified as part of their enquiry, it is still notable that, of those who did, 634 identified as white, 7 as Asian/Asian British and 7 from another ethnic group.

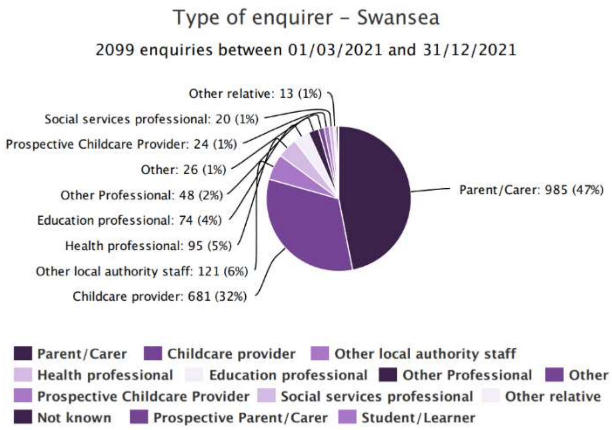


6.4.1.2 Significantly, 2079 (99%) of all enquiries to FIS were made in English, with only 5 in Welsh and 2 bilingually.

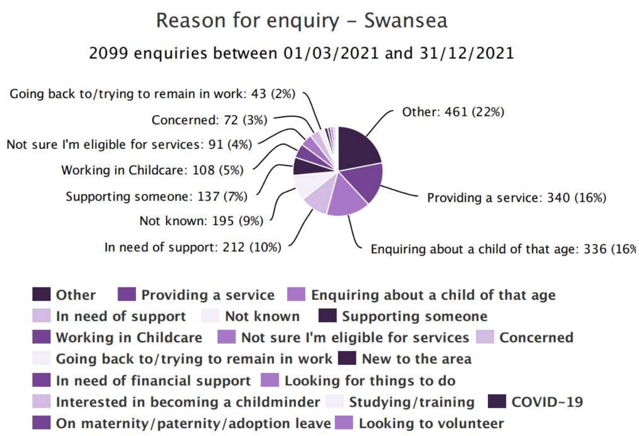


6.4.1.3 In terms of 'type' of enquirer, parent/carers accounted for 47% of all enquiries received.

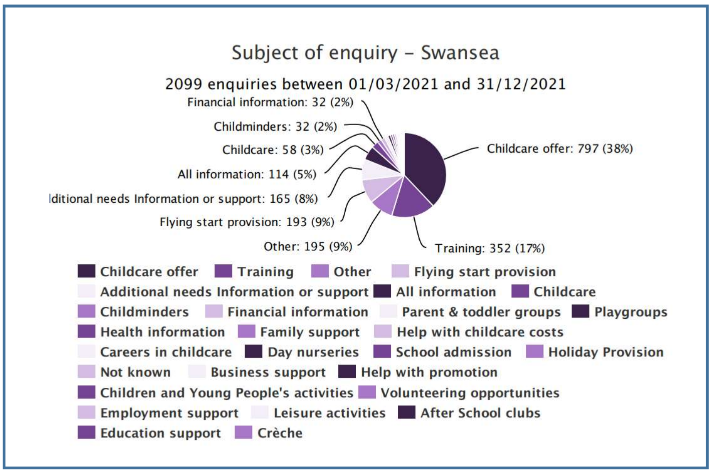
However, this does suggest that just over half of enquiries do not specifically relate to parent/carer requests.



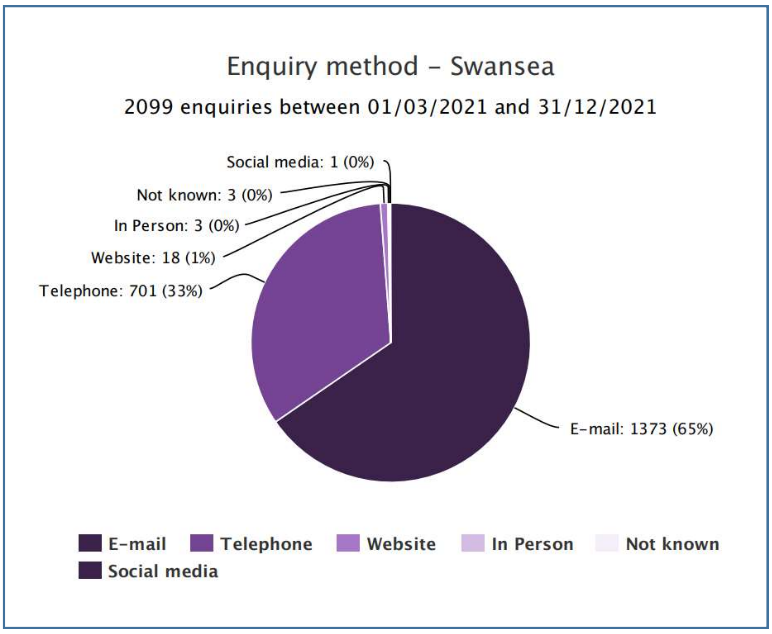
6.4.1.4 In terms of the reason for enquiring to FIS, 16% were enquiring about their child, 10% were in need of support and 2% were looking to return to work. 4% were enquiring as not sure about eligibility.



6.4.1.5 Notably, 38% of enquiries related to the Childcare Offer. Flying Start (9%) and Additional Needs (8%) were the next most frequent, aside from training.



6.4.1.6 65% of enquiries were via e-mail, with an additional 1/3 via telephone. Website, social media and in person contact equates to less than 2% between them.



6.4.1.7 Additionally, there is work in place to develop Parent Champions, as part of the Early Years Integration and Transformation agenda (Pathfinder), which will support this process.

6.5 Coram Holiday Childcare Survey

6.5.1 The Coram Holiday Childcare Survey is completed annually as a means of identifying demand for holiday childcare. As most of the Swansea-specific information is obtained via the local authority and therefore will already be factored in, it is worth considering the document in terms of overall trends (See Section 16 Gap Analysis)

https://www.familyandchildcaretrust.org/holiday-childcare-survey-2021

Areas for action

Coram Family and Childcare are calling on the UK, Scottish and Welsh Governments to:

► *Include out of school childcare within pandemic recovery planning, given its vital role around helping children to catch up on lost learning and supporting parents to work.*
► *As part of the evaluation of the Holiday Activities and Food programme, consider the role that this funding could have to improve access to affordable, high quality childcare and feed this learning into future funding.*
► *Move to upfront payments for the childcare element of Universal Credit so that it offers comparable support to families claiming Tax Free Childcare. This will mean that parents can get the support they need to be able to pay the higher childcare costs during school holidays.*
► *Make sure there is enough year round childcare for every working family that needs it, including school age children. Governments should prioritise the groups that currently face the biggest shortages: children in rural areas, 12 to 14 year olds and disabled children.*

6.6 Demand for childcare summary and key actions

6.6.1 In simplest terms, parent/carers have a desire for their child to attend more formal childcare for the opportunities to engage with their peers and many have a desire for Welsh medium to be a part of this – yet they invariably elect to either access informal childcare or English speaking provision, citing cost and lack of availability of Welsh medium provision as main barriers.

6.6.1.1 *It could be suggested that parent/carers set out with an aim of their child receiving 'the best' which could be regarded as formal care affording interactive and developmental opportunities and the chance to be bilingual, but when it comes to it, they opt for more familiar arrangements.*

6. Demand for Childcare – Summary of Key Findings

- By some distance, the primary area of concern for parents/carers was the cost of childcare, with many finding it too expensive.
- Overall, parents are happy with the quality of local childcare
- Notably, the most frequent response was that childcare used was informal care provided by friends and family, but many conversely state that this wouldn't be their first choice.
- This is potentially backed up by findings from those who will be accessing more childcare over the coming two years who noted breakfast clubs, after school and full day care above friends & family. This might suggest that parents/carers set out with the intention of accessing formal care but often elect to use family instead.
- There is a suggestion that more families would like their child to attend Welsh medium provision than is currently available.
- The Coram Holiday Childcare report suggests a shortfall in provision for 12-14 year olds
- *Ultimately, CSA's have traditionally identified gaps or trends from parents that, when followed up, suggest that the need is not there in reality. Work needs to happen to further dissect any trend or perceived gap, to test its validity.*

6. Demand for Childcare – Action Plan				
Challenge	Action	Responsible	Timescale	Outcome
6.1 High number of respondents stating cost is a barrier to childcare	Increase take-up of tax credits (see 13) Work with settings on sibling discounts and other	LA & Partners	Ongoing	Increase in families accessing tax credits Fewer reporting cost is a barrier
6.2 Parents reporting a lack of 'choice' of childcare (while noting they have childcare available)	Consider implication of 'choice'	LA & Partners	March 24	Identify whether insufficient choice means more provision is needed
6.3 Perceived finding that parents would prefer formal care but later opt for informal care from parents.	Undertake additional research / engagement to identify reasons for this	LA & Partners	March 23	Additional evidence to identify any specific barriers to realising aim
6.4 Need to engage parent/carers in planning and policy development	Development of Parent Champions	LA & Partners	March 23	Parent Champions in place and engaged
6.5 Satisfaction with quality of holiday provision was proportionately lower than term-time	Further assessment of why this difference exists and corrective measures where appropriate	LA & Partners	March 24	Identify if satisfaction is lower and address reasons

6.6 Suggestion that more families would like their child to attend Welsh medium provision than is currently available	Further assessment of why they feel this	LA & Partners	March 24	Identification of whether this represents a deficiency
6.7 Ensuring that parental needs identified within CSA are followed up to confirm validity	Develop social media presence or other parental engagement to ‘test’ key findings	LA	March 23	Social media ‘childcare sufficiency presence’ in place
6.8 Consider Coram finding of shortfall in holiday care for 12-14 years	Identify whether an issue or case of low demand	LA & Partners	March 25	Research completed evidencing gap or otherwise

7. Geographical Distribution

7.1 Requirements

7.1.1 It is necessary to include an analysis of geographical distribution of each type of childcare in the LA area and any gaps in distribution.

7.1.2 To effectively evaluate, it is important to consider the geographical make-up of the area, considering access to and from each ward, as well as the impact of neighbouring wards*.

7.1.2.1 * It is pertinent to note that for the 2017 CSA, 2 wards – Fairwood and Mawr – were identified as deficient due to a lack of childcare provision within the ward. However, subsequent development work and enquiries have identified there is no unmet need, suggesting that those within each ward were able to access provision in neighbouring wards.

7.2 Data Capture

7.2.1 This section pulls together data from the SASS, Dewis and the range of internal surveys that formed ward overviews for each area. It is worth noting that supply by area is subject to fluctuation so maps are as of January 2022.

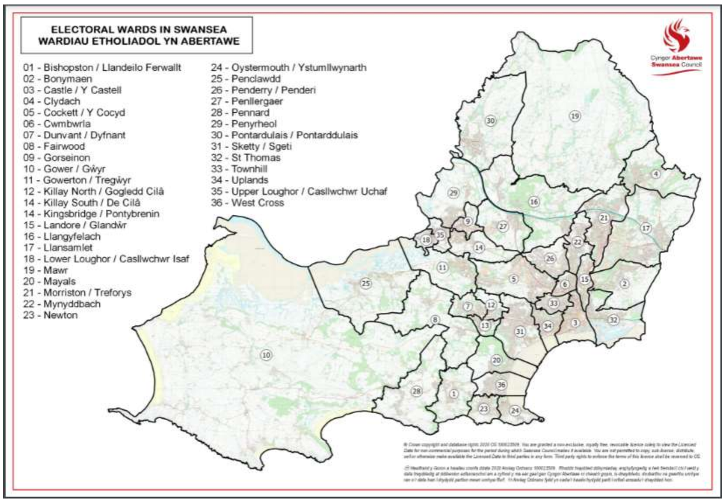
7.2.2 Additionally, these were cross-referenced against ward data. This data ultimately derives from the 2021 Census, although due to timescales, 2020 mid-year estimates were used to form initial conclusions that were then cross-referenced once full 2021 data was available.

7.2.3 The Local Authority's Research & Information team provided geographical data to support completion.

7.3 Geographical Overview of Swansea

7.3.1 Swansea is an area of geographical diversity comprising a mix of densely populated urban communities and large rural spaces.

As detailed in section 9, it is bordered by Carmarthenshire in the North West and Neath Port Talbot to the East.



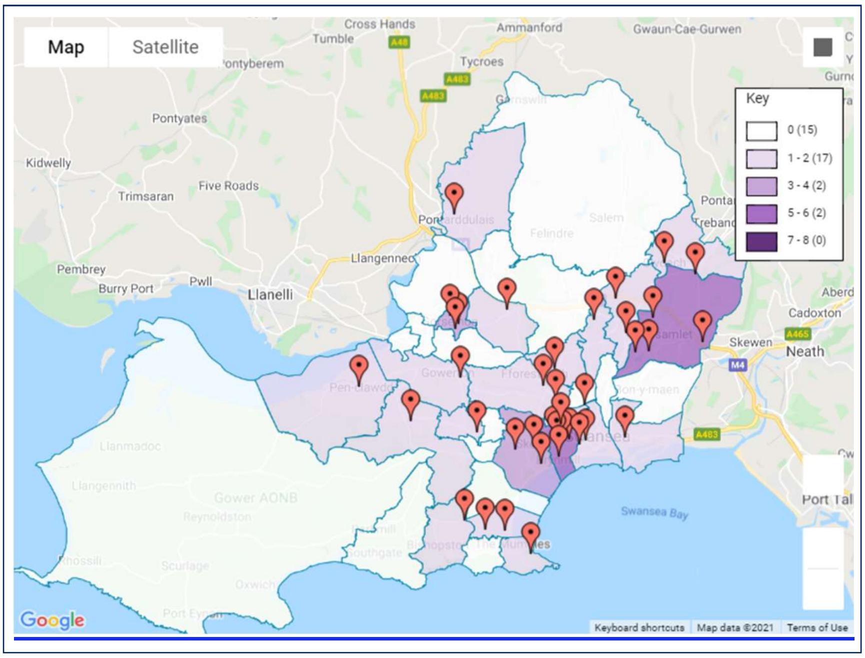
7.4 Key Findings

7.4.1 Distribution of Full Day Care Provision (Day Nurseries)

7.4.1.1 As evidenced in the diagram below, our registered day nurseries are relatively closely located, with several areas appearing to be less favourably served.

7.4.1.2 Two wards (Llansamlet & Uplands) contain between 5 and 6 day nurseries, although both are areas that serve large areas of employment.

7.4.1.3 Notably, 15 of Swansea's 36 wards do not have a registered day nursery within them. By itself, this suggests deficiency, although this cannot be considered in isolation. As a counter to this, there is no ward that doesn't have a day nursery in an adjoining ward.



Supply of Day Nurseries by Ward

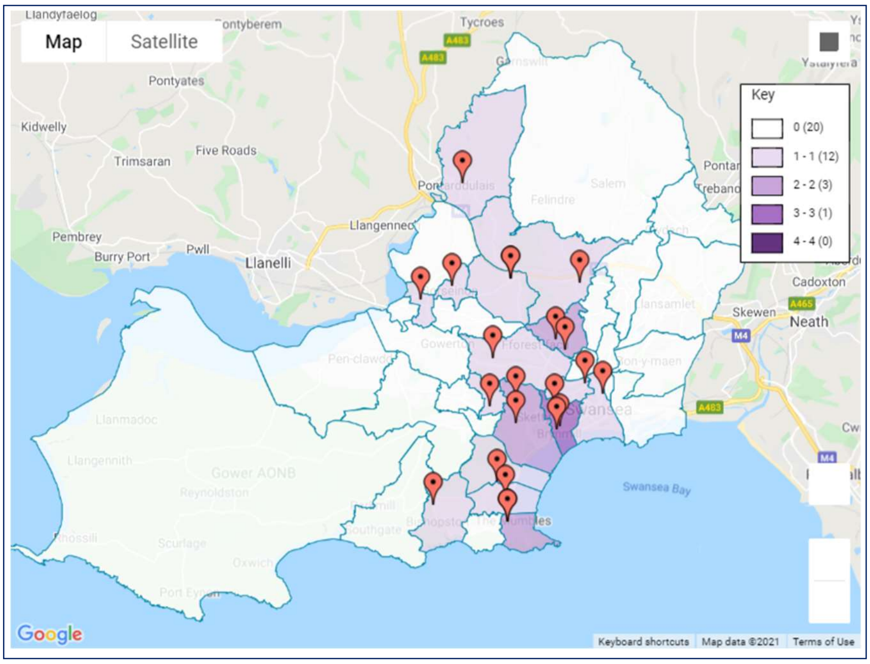
Source: Dewis December 2021

7.4.2 Distribution of After School Clubs

7.4.2.1 The distribution of Swansea's after-school clubs is comparatively even with 16 wards having between 1 and 3 settings.

7.4.2.2 There is a clear 'central band' of settings running from Pontarddulais in the north to Bishopston in the South, with none of the 14 wards furthest East and West having provision.

7.4.2.3 There is a clear difference between day nursery and after school club provision in West with Llansamlet and the neighbouring wards having a high number of day nurseries that is not replicated with provision for school-age children.

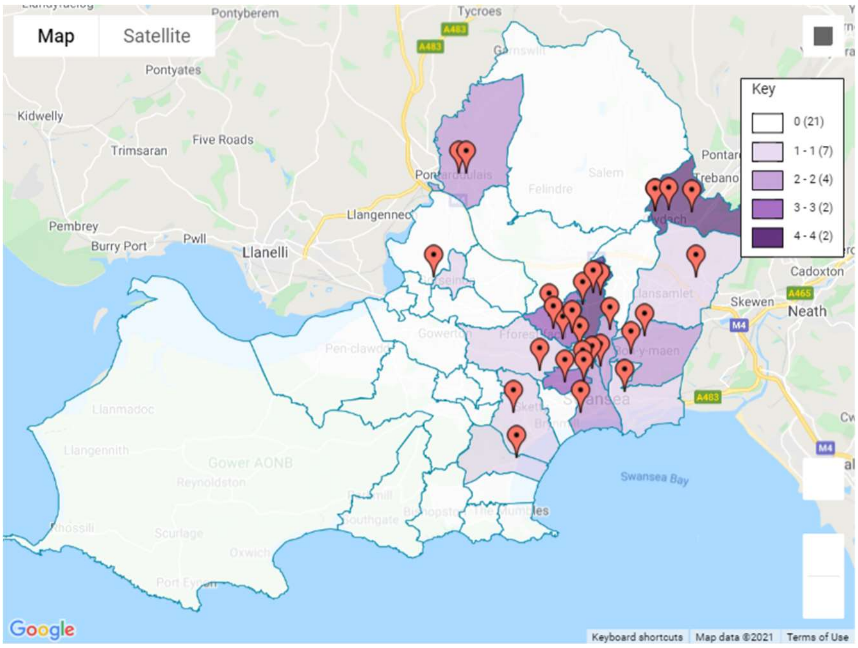


Supply of After School Clubs by Ward

Source: Dewis December 2021

7.4.3 Distribution of Sessional Day Care

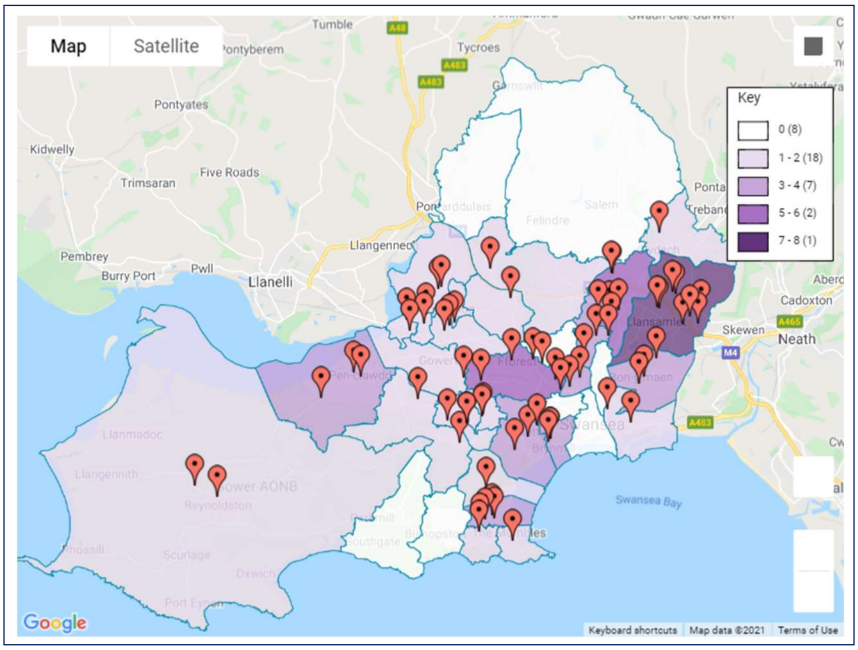
7.4.3.1 Sessional care includes play groups as identified on Dewis. Whilst generally following a similar pattern to other types, it provides more of a picture of coverage within the East/Central area with only 3 settings outside of this.



Supply of Sessional Care by Ward

Source: Dewis February 2022

7.4.4 Distribution of Childminders



Supply of Childminders by Ward

Source: Dewis December 2021

7.4.4.1 The allocation of childminders is perhaps the most consistent across Swansea's wards with only 8 not having at least 1. As with other types, it is the areas to the North and West that have least provision.

7.4.4.2 It is interesting to observe areas in which there appear to be a large number of providers within a relatively close space – Loughor (and surrounding areas), Morriston and West Cross are all examples of this. This may potentially equate to an over-supply, but will need more consideration.

7.4.5 Distribution of Holiday Clubs

Supply of Holiday Clubs by Ward

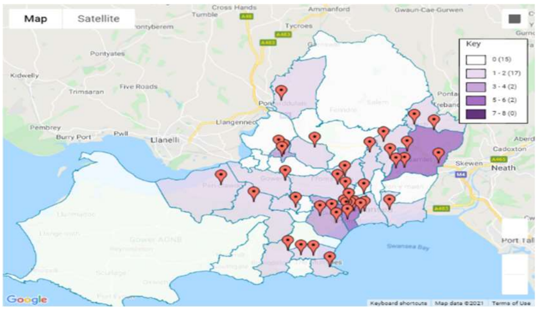
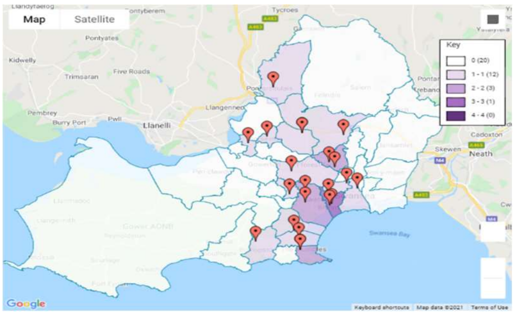
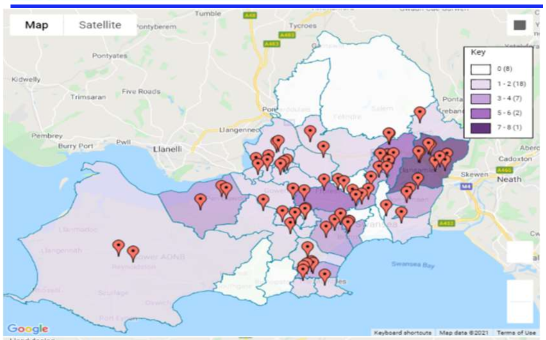
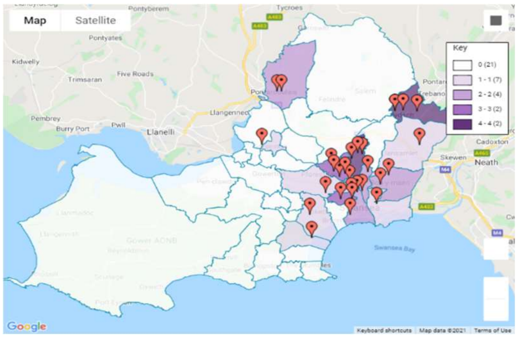
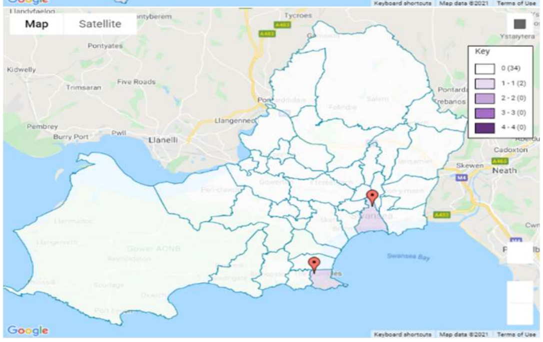
Source: Dewis December 2021

7.4.4.1 Given that Swansea only has 2 registered Holiday Clubs, there is limited value to documenting, other than to illustrate that the vast majority of parents within Swansea are not within easy access of a holiday club.

7.4.4.2 It must be noted that the majority of day care settings as well as childminders, will offer holiday care provision, so this picture may be slightly misleading. In terms of the number of Holiday care – we can only put this down to settings being registered as full day care / sessional and then also running Holiday care under the main registration so we may not be aware that setting is running Holiday care as it doesn't show on their CIW Registration.

7.4.5 Distribution of All Registered Provision

7.4.5.1 Lastly, by mapping all provision together we are able to identify where there are areas of overall shortage, as well as perhaps where there is potential saturation or over-supply of childcare. Unfortunately, Dewis does not allow for a map covering all provision, so this is best demonstrated by placing all maps alongside each other.

7.4.5.2 It is clear to see that there are large proportions of Swansea that appear to have little or no childcare provision. However, this cannot be considered in isolation, as has been evidenced by previous assessments which identified deficient wards, yet subsequent development work failed to highlight a need for added provision.

7.4.5.3 The most evident gaps in geographical provision are the Gower and Mawr wards.

7.4.5.4 It is notable that, Gower and Killay aside, each of the areas considered deficient border either Carmarthenshire in the North and West or Neath Port Talbot in the East. As such, it will be necessary to determine whether in these areas, it is preferable to attend childcare in the neighbouring authority. This will be picked up further in **Section 9. Cross Border.**

7.4.6 Areas of Perceived Deficiency

7.4.6.1 As noted earlier, previous Assessments have identified areas as deficient when subsequent research has identified that this may not be the case. As such, a 'perceived childcare deficiency' assessment can identify mitigating factors.

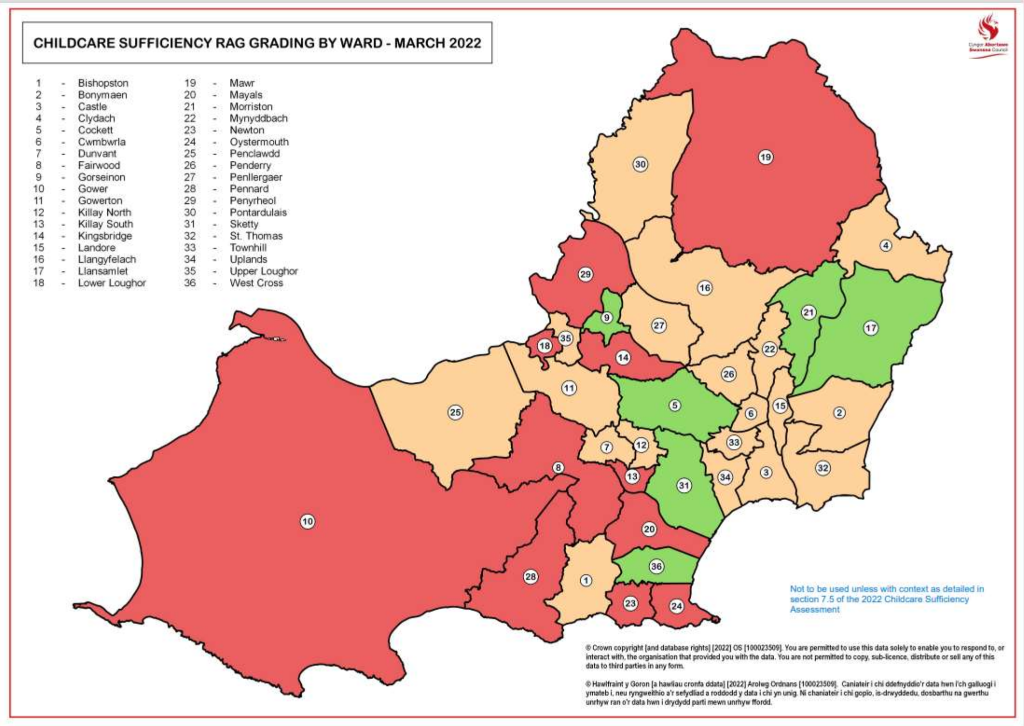
Areas of Perceived Childcare Deficiency			
Area	Justification	Considerations	Assessment
Fairwood	Limited provision within ward	Previously identified as deficient Low population and adjacent to neighbouring areas of high supply	Area for consideration, but no confirmed deficiency requiring addressing
Gower	No provision other than 2 childminders across ward that covers around 1/3 of land mass of Swansea	Low population compared to other areas	Suggested deficiency, although additional surveying of ward will be beneficial
Killay (North & South)	No provision other than one sessional day care within area of high population	Adjacent to many areas with higher proportion of places. No identified statements of deficiency	Suggested deficiency, although additional surveying of ward will be beneficial to see whether current arrangements are satisfactory
Mawr	No provision within ward	Previously identified as deficient	Perceived Deficiency but requires further research
St Thomas	Limited provision within ward	Close proximity to city centre, bordering wards with high level of provision and neighbouring county	Suggested deficiency, although additional surveying of ward will be beneficial

7.4.6.2 Based on this, it can be considered that certain areas considered deficient may not actually be so. It is suggested that this table, or similar, be developed to consider other areas that may be deficient.

7.4.6.3 Equally, it is noted that several areas appear to potential have 'too much' provision. This is equally important to assess to ensure that provision is viable.

7.5 RAG Grading Sufficiency by Ward

7.5.1 Using the ward RAG data created in section 5.3.9 we can develop a ward map of relative childcare sufficiency. Note that this is for guidance only as a means of illustrating where areas of relative sufficiency may be impacted by neighbouring areas.



7.5.2 It does highlight that despite there being only 5 wards classed as green, 23 of the remaining wards adjourn a green ward. Notably, where Killay North (12) is identified as potentially deficient in 7.4.5.4, it shows that the neighbouring green areas of Cockett and Sketty will likely provide convenient childcare.

7.5.3 It suggests that the wards to the north have limited neighbouring provision and likewise, Gower which is an 'established red' has a buffer of 6 red or amber wards between itself and an area of high provision.

7. Geographical Distribution – Summary of Key Findings

- It is evident that there are areas of Swansea which have a lower level of provision than others.
- It is important to look at any mitigating factors that might impact on why provision is low but there is no call for additional childcare.
- Additionally, it appears that some areas may have a surplus of childcare places which may impact upon sustainability.

7. Geographical Distribution – Action Plan				
Challenge	Action	Responsible	Timescale	Outcome
7.1 Potential lack of childcare in identified areas	7.1 Potential lack of childcare in identified areas	Further assessment to identify	March 23	Identify whether perceived gaps are

		whether 'perceived deficiency' is the case.		correct and respond accordingly
7.2 Respond to identified gaps in distribution	7.2 Respond to identified gaps in distribution	Undertake engagement in areas identified as deficient	March 23	Look to increase provision in key areas
	7.3 Consider potential over-supply in some areas	7.3 Assess potential over-supply and any issues it may create	March 24	Identify if over-supply can affect sustainability

8. Sustainability

8.1 Requirements

8.1.1 It is a requirement to consider the sustainability of the local childcare sector with a recommendation to consider;

- Grants and other funding to childcare providers
- Number of new registrations and de-registrations
- The impact of Covid on supply and demand

8.2 Data Capture

8.2.1 The primary source of data for this section came from assessing settings' own views of their sustainability position and requirements. This predominantly came from specific questions within the sector survey and SASS which asked whether they feel they will be operational

8.2.2 Given the contribution of grant funding support to aid sustainability, details of grant funding programmes and allocations was obtained.

8.2.4 It was recognised that business health checks are an effective method for assessing sustainability. The umbrella organisations for which we commission development work undertake business health checks with their member settings.

8.3 Grant Funding & Financial Support

8.3.1 Swansea has traditionally offered grant funding to the local childcare sector with sustainability being one of the primary criteria.

8.3.2 The Childcare & Play element of the **Children & Communities Grant** (CCG) is intended to support local authorities to meet actions arising from the most recent CSA. In Swansea, it is allocated as;

- The Grants & Monitoring Officer post
- Funding for Devt Officer support from Clybiau Plant Cymru Kids Clubs, Early Years Wales and Mudiad Meithrin
- Grant funding for settings

8.3.4 Additional funding from Welsh Government during the Covid-19 pandemic was particularly beneficial to the sector. This was made available during the 20/21 and 21/22 financial years with a specific aim to support sustainability affected by the pandemic.

8.3.5 As detailed within **Section 10 Covid-19**, the past two financial years have seen significant grant funding being made available to support sustainability in the face of Covid-19. As beneficial as this has been, there is potential that it may have 'masked' the issue of sustainability which may re-emerge after this funding support ceases.

8.3.5.1 Whilst it is hoped that the withdrawal of additional grant funding will coincide with a recovery in terms of attendance, this must remain a consideration.

8.3.5.2 As noted by one of the umbrella organisations*, 'Continued sustainability funding for the sector is imperative as they continue to recover. (There are)reduced numbers as many parents continue to work from home or benefit from a more hybrid home/workplace balance which means that numbers may continue to be on the low side.'* They also noted that 'continued third party issues exacerbate sustainability of settings post Covid 19'.

8.4 Registrations & De-Registrations

8.4.1 Temporary Closures

There has been an increasing number of temporary closures during the past couple of years which is unsurprising in light of the impact of the Covid-19 pandemic.

8.4.2 Details of temporary closures submitted to CIW are fed back to each local authority and are available within the table below. However it is noted that not all settings are using the temporary closed status as perhaps it was originally envisaged. In February 2022, Swansea had four settings that had been on the Temporary Closed list for a long period, i.e. not 'temporary'. Having spoken to most of those settings , they are not closed due to a Covid Positive status but are unsure as to whether they will return to opening, due to the effects on their operations of the pandemic such as additional costs, difficulty of operation, additional measures, risk to extended family who are shielding etc.

8.4.3 It is noticeable that the greatest impact on services was felt at the start of 2022 with 10 settings closed at the end of January. Additionally, even with a drop in the number of 'current closures' the number of services has dropped steadily from 193 in November 2021 to 183 in March 2022.

Week	Number of Services	Maximum Capacity	Current Closures	% of closures by total	Closures - max capacity	% of max capacity closed	Number re-opened	Re-opened max capacity	Positive Covid Notification Received	Positive Covid Notifications - excluding suspended services
03/03/2022	183	4626	7	3.80%	72	1.60%	92	2570	64	61
24/02/2022	184	4626	7	3.60%	80	1.66%	92	2570	62	59
17/02/2022	184	4626	6	3.30%	85	1.80%	90	2525	60	57
10/02/2022	186	4658	6	3.20%	102	2.20%	92	2540	60	57
03/02/2022	188	4696	8	4.30%	122	2.60%	90	2520	60	57
27/01/2022	188	4696	10	5.30%	188	4%	88	2454	58	55
20/01/2022	187	4694	9	4.80%	164	3.50%	90	2526	55	52
13/01/2022	188	4700	8	4.30%	132	2.80%	90	2548	51	48
06/01/2022	188	4697	6	3.20%	76	1.60%	91	2594	50	47
22/12/2021	189	4721	5	2.60%	70	1.50%	92	2618	49	46
16/12/2021	190	4745	7	3.70%	112	2.40%	90	2576	49	46
09/12/2021	192	4763	7	3.60%	112	2.40%	90	2576	49	46
02/12/2021	192	4743	7	3.60%	122	2.60%	89	2556	47	44
26/11/2021	192	4743	7	3.60%	90	1.90%	89	2588	47	44
19/11/2021	193	4749	6	3.10%	123	2.60%	89	2545	46	43

8.5 Impact of Covid

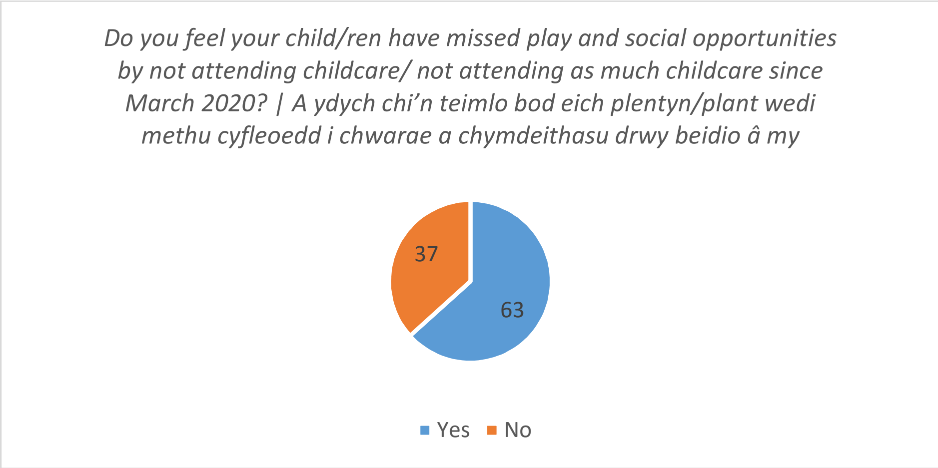
8.5.1 It is firstly pertinent to acknowledge the specific section on the Impact of Covid **(Chapter 10)**, so any inclusion within this section focusses specifically on the impact on sustainability of the Covid-19 pandemic.

8.5.2 It has been a priority throughout this time to ensure that any concerns or priorities resulting from Covid were identified. In October 2020, Swansea convened a group of key local childcare development experts[5] to discuss the impact of Covid and by some distance the primary concern arising from Covid was the impact on sustainability.

8.5.2.1 Accordingly, local funding was geared towards financial sustainability and this was followed by a further commitment from Welsh Government to providing funding to support sector sustainability.

8.5.3 Additionally, a further impact of Covid has been to the children themselves. When asked their view, parent/carers felt by almost 2/1 that their child had missed out on social opportunities by not attending as much childcare during periods of Covid lockdown.

5



8.6 Business Health Checks

8.6.1 Settings have been subject to business health checks for many years now, as an essential means of assessing how well they are doing in terms of viability and quality.

8.6.2 Now, more than ever, it is essential that Swansea's childcare sector is in a position to determine for itself how 'healthy' it is. Equally, this is something that the local authority and its partners needs a clear picture of.

8.6.3 Some of the umbrella organisations currently offer this to their member settings. Clybiau Plant Cymru Kids Clubs' Out of School Club Assessment is a self-health check covering all aspects of the business which helps generate an action plan identifying short, medium and long term actions

8.6.4 Notably, settings are responding that they do not know if they will be in existence in 1-2 years' time and it is important to be able to identify and assess what they are basing this on. Whilst the current climate with Covid-19 will inevitably place doubt, there are measures that settings can be identifying in terms of their viability;

Finance	- How much 'cash in the bank' is there - Is the setting aware of grant funding and other support that might be available
Attendance	- What is the current attendance level? - What likely future attendance trends are there and how might they have an impact?
Infrastructure	- Is there a well-established management / trustee group in place? - Does the setting know where to access support and guidance from the local authority or umbrella organisation?
Reputation	- Is the setting well-regarded? - Are there any considerations from CIW Inspections or other that might affect this?
Staffing	- Is the setting fully staffed? Any recruitment or retention issues? - Are staff fully checked / trained / qualified to meet current or future requirements - How is staff morale?

8.6.4 Conducting a business health check will assist with identifying support. An additional benefit to undertaking business health checks is that it supports local grant decision-making. A setting identified at risk may be deemed a more appropriate grant recipient, however, in some situations it may be felt that a setting presents too great a risk for a certain type of funding.

8.6.5 One potential is to offer a RAG (Red, Amber, Green) Assessment for settings based on a table similar to that shown above, including an overall rating. This could assist further by mapping trends e.g. a high proportion of 'at risk' settings in a particular area, or perhaps a concern over financial viability of a particular childcare type, such as childminders.

8.7 Key Findings

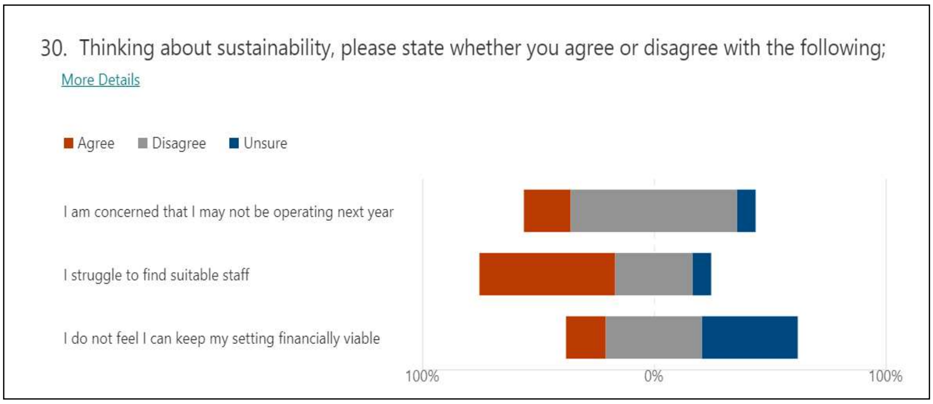
8.7.1 Following engagement with development officers and via the findings of consultation with the sector, financial sustainability is a major concern for many.

8.7.2 There were many settings that stated that they were unsure if they would still be in existence over the next two years. This is a major concern, although key to this is identifying what these views are based on.

Settings have fed back concerns as to whether they will be operational in 1-2 years' time. What are they basing this view on? Becoming financially unviable, struggling to recruit or retain staff? It is telling that as many settings were responding 'don't know' as a positive or negative response. Whilst much of this will be part of an inevitable 'lifecycle', i.e. a natural drop-off of some settings, it can certainly be assumed that much is as a result of the current situation.

8.7.3 It is pertinent to note that for childminders in particular there is often an accepted 'lifecycle' whereby childminding is a viable career choice whilst your own children are a particular age, so some element of leaving the sector is inevitable.

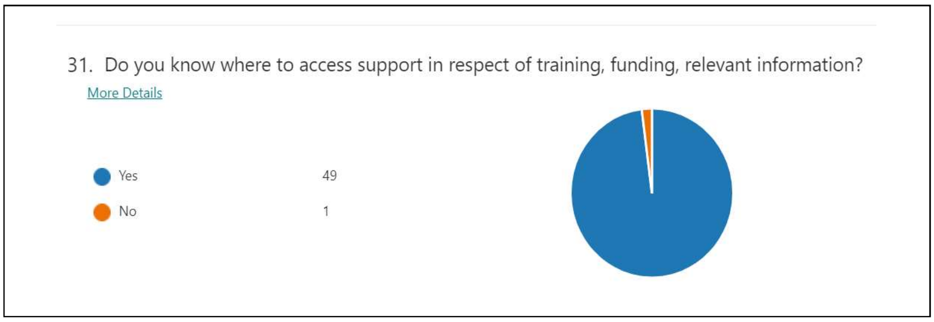
8.7.4 The sector survey completed in March 2021 detailed that while most settings did not appear to be concerned about being in operation a year later, most stated they were struggling to find suitable staff, while there was uncertainty over whether they can keep their setting viable.



Source: 2021 Sector Survey (Swansea Council) Sample Size 50

Sample Size	Due to COVID, are you currently operating at full capacity?	Child Minder Yes	Child Minder No	Day Care Yes	Day Care No	Based on the current situation, are you fairly confident that it would be financially sustainable to continue to run your childcare provision for	Child Minder Don't Know	Child Minder For A Year Or More	Day Care Don't Know	Day Care For A Year Or More	6 Months or less*
153		37	28	57	31		20	45	24	63	1

8.7.5 A key element of sustainability is settings' ability to access funding and it was reassuring that when asked, 98% of the sector stated they knew how to access support, including funding.



8.7.6 Third party lettings have been identified as a barrier to sustainability in some Out Of School Care especially After School Clubs. It is felt that if these were more affordable, the setting would more likely be sustainable and potentially could have funds to provide more attractive wages.

8. Sustainability – Summary of Key Findings

- Settings have consistently identified concerns over future financial sustainability with many unsure if they will be in operation in two years' time
- Covid-19 has inevitably had a major impact and will continue to for some time.
- It is a positive that 98% of respondents felt they knew where to access support.
- While there are no major suggestions that childcare needs will change considerably as a result of Covid and associated changes to working patterns, there is a possibility that not as many places will be required (see impact of Covid).

8. Sustainability – Action Plan

Challenge	Action	Responsible	Timescale	Outcome
8.1 Need to identify future setting sustainability	8.1 Undertake business health checks	LA & Partners	Ongoing	Identify sustainability of settings including concerns
	8.1 Sector survey to assess sustainability	LA	March 23	Additional means to assess
	8.1 Advise on grant funding to support sustainability	LA & Partners	Ongoing	Financial support for settings

8.2 Many settings are unsure if they will be operating in next 1-2 years	8.2 Identify why this is felt and what can be done to address it	LA & Partners	March 23	Potential closures can be addressed where appropriate
8.3 Potential reduction in childcare requirements	8.3 Further investigation including vacancy monitoring	LA & Partners	March 23	Better able to identify demand on ongoing basis
8.4 Concern that recruitment issues are affecting sustainability	8.4 Consider as part of workforce development section	LA & Partners	Ongoing	As detailed within section 14

9. Cross Border

9.1 Requirements

9.1.1 This section asks for a consideration of the impact of childcare cutting across neighbouring authorities including the needs of those who use childcare outside of LA area as well as those who travel to LA area to use childcare

9.2 Data Capture

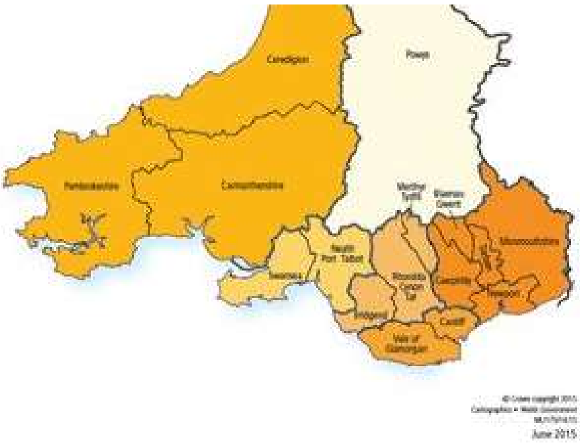
9.2.1 The primary source of data capture was to gain information on available childcare from representatives of the bordering local authorities of Carmarthenshire and Neath Port Talbot.

9.2.2 There is a particular requirement to consider the impact of those accessing the 30 Hour Offer across county boundaries.

9.3 Regional Context

9.3.1 Swansea is located in the South West of Wales. It borders Carmarthenshire to the North and West and North Port Talbot to the East.

9.3.3 It is particularly pertinent to consider those two areas given the likelihood that families bordering Swansea will have potential to travel into Swansea for work and vice-versa.



9.3.3 Additionally, Swansea is most frequently also grouped with Bridgend due to its close proximity.

9.3.4 As such, a regional group was developed with the CSA leads for these 4 areas.

Childcare Offer

9.3.5 The table below demonstrates how many Swansea families are accessing childcare in neighbouring counties through the Childcare Offer for Wales.

Area	Type of setting	How many children per type accessing
Neath Port talbot	6 day nurseries	7 children
	1 childminder	1 child
	1 sessional care	2 children
Carmarthenshire	2 childminders	2 children
	1 day nursery	1 child

9.4 Key Findings

9.4.1 The various surveys involved with the 2022 CSA include both direct and indirect questions that allow families to detail cross-border childcare arrangements. Notable cross-border references made are as follows;

- 'Choice of Welsh medium provision is limited and too far sometimes. School Nursery provision is better in another county which is close to where we live- they can attend all day'

- 'I live JUST in Swansea; but my local town is Ammanford. That makes things difficult in general. Add to this that there is VERY limited choice of Welsh medium nursery and schools locally; most being bilingual - but these tend towards English. We are very lucky that Jac-Y-Do is local enough as they're fantastic,'

9.4.1.1 Notably, both of these comments are as much about Welsh medium provision as they are about out of county care. This is a pertinent point as there is a higher prevalence of Welsh speaking in the wards that neighbour Carmarthenshire in particular.

Cross-Border Commuting

9.4.2 A significant finding in terms of commuting between Swansea and it bordering areas is that of the 112,100 Swansea residents who are working, 83% work within Swansea. This is a higher figure than Carmarthenshire's 79% and significantly higher than Neath Port Talbot's 53%.

9.4.2.1 With a 'net in flow' of 14%, the suggestion is anywhere up to 12,000 residents of NPT are travelling into Swansea each day to work, as noted below. It is likely that this will put additional demand on local childcare, particularly that located between NPT and major business locations of City Centre and Llansamlet.

Commuting

Data published by Welsh Government from the Annual Population Survey illustrates the strong integration between the Swansea labour market and its neighbour authorities – Neath Port Talbot and Carmarthenshire. Analysis of travel-to-work patterns suggest that the most significant cross-boundary flows occur into Swansea from these adjacent areas. In 2020, Swansea had the second highest net inflow of local authority areas in Wales (+14,800), behind only Cardiff. The data also indicates that 83% of Swansea residents worked within the local authority area, with only Pembrokeshire, Ceredigion and Gwynedd having a higher equivalent figure in Wales.

Area	Number of working residents	Number working in the area	% of residents working in area of residence	Commuting out of the area	Commuting into the area	Net inflow
Swansea	**112,100**	**126,900**	**83%** (93,500)	**18,600**	**33,400**	**+14,800**
Neath Port Talbot	61,700	49,200	53% (32,400)	29,300	16,800	-12,500
Carmarthenshire	78,800	77,500	79% (62,600)	16,200	14,900	-1,300
Wales	*1,430,400*	*1,378,400*	*96% (1,330,100)*	*100,300*	*48,400*	*-51,900*

Where the residents of Swansea work:
Swansea = 93,500; Carmarthenshire = 6,000; Neath Port Talbot = 5,700; other areas = 6,900.
Origin of those working in Swansea:
Swansea = 93,500; Neath Port Talbot = 17,400; Carmarthenshire = 6,900; other areas = 9,100.

Source: *Annual Population Survey (ONS); Commuting tables 2020, Welsh Government (published on Stats Wales 14 April 2021).*

Notes:
i. The statistics provide estimates of commuting for local authorities in Wales for the calendar year 2020, based on Annual Population Survey (APS) data from ONS. As the APS is a sample survey all estimates are subject to sampling variability.
ii. The statistics examine commuting patterns for those in employment. The analysis is based solely on a person's main job.
iii. Responses for work location relate to the respondent's usual working pattern if coronavirus restrictions were not in place.

9. Cross Border – Summary of Key Findings

- Swansea is a major recipient of commuters, particularly from NPT, who will require additional childcare. It is worth considering the impact of this on availability of places in settings neighbouring the County.
- The notable responses from parent/carers in relation to cross-border childcare arrangements both relate to an absence of Welsh-medium provision. It appears that Welsh-speaking parents are opting to cross into Carmarthenshire for childcare due to a perceived improved Welsh medium offer. This needs further investigation.

9. Cross Border – Action Plan

Challenge	Action	Responsible	Timescale	Outcome
9.1 Identify whether settings on county borders are unduly impacted by cross-border requests	9.1 Additional research with relevant settings to identify if a factor	LA & Partners	March 23	An identification of implications with consideration to whether it equates to a deficiency
9.2 A perceived view from some Welsh speaking families that cross-border provision may be more suitable	9.2 Additional research into this feedback 9.2 If a gap is apparent, look at how it can be addressed	LA & Partners	March 24	Clarity over whether families are opting to access this Corrective measures as appropriate

10. Covid -19

10.1 Requirements

10.1.1 It is a requirement to consider how COVID-19 has affected the supply of childcare, the demand for childcare and the sustainability of existing childcare providers, as well as how these impacts will be addressed in the Action Plan.

10.1.2 It is inevitable that there is significant cross-over between this section and section 8 sustainability as settings frequently reported an impact on sustainability.

10.2 The Impact of Covid

10.2.1 The Covid-19 had, and continues to have, a significant impact on Swansea's childcare sector and the families it supports. No event during the period in which local authorities have had a duty to assess childcare sufficiency, and for many years before, will have required the childcare sector to adapt to the extent this has.

10.2.2 It is likely that the impact of Covid-19 will be felt for many years, with changes or adjustments introduced as a result continuing to be followed. The most prevalent of these in relation to parental need is likely to be the impact of home working.

10.2.3 Additionally, the impact on staff is likely to be considerate.

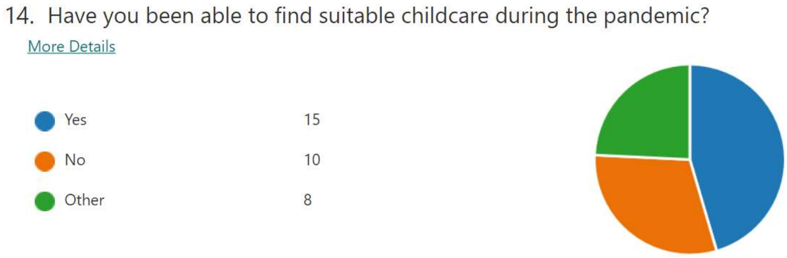
10.3 Key Findings

10.3.2 The 20/21 Parent/carer survey asked how childcare requirements had changed as a result of Covid, with responses being;

- *Need less childcare as working from home. Have got used to working with the children home and adapted work around them so while childcare is preferable it is no longer essential*
- *'No change'*
- *'Childcare closes a bit earlier however husband and I are now working from home so not an issue at the moment'*
- *'need less care around school times as working from home. found that creche are more likely to reject taking children for very minor reasons and linking it to covid where no link applies'*
- *'Due to the pandemic, pregnancy and moving to the area I had to give up my old job. This means I need less flexible childcare now but it may make finding a job in the future harder as the nursery I use has fixed days'*
- *'Less requirement due to home working'*
- *'Key worker parents..have required childcare throughout'*
- *'Before COVID my 8 year old would have gone to the local leisure centre holiday clubs, whilst I was in work over the school holidays. This option hasn't been available since COVID. With regards to my 4 year old, they would have gone to a local creche/ day nursery prior to COVID, whilst I was in work. During the pandemic I have worked from home whilst trying to look after the 2 children. Its not been an ideal situation for any of us.* ***I really think childcare sector is a wonderful sector and I personally would be lost without the support and use of***

these facilities. It is vital that children receive as much interaction as possible with other children. This is an important life lesson which all children should receive'
'No breakfast or after school club available'

10.3.3 Families were asked further about the impact of the pandemic during 2021. When asked if they had been able to find suitable childcare, almost half felt they had, yet 43% said they couldn't find any.



10.3.3.1 It is worth noting that this will have also been the case for many using informal childcare via friends and family. The role of grandparents in providing childcare is evident, but for many older grandparents, they would have needed to stay away from their childcare 'duties' for much of the pandemic for their own safety in adherence to government guidelines.

10.3.3.2 While many settings reported that they were seeing a gradual return towards pre-pandemic numbers, very few had seen a full return. ***A 'loose' attendance summary gleaned in late 2021 suggested if pre-pandemic levels were 100%, they were roughly dropping to 50% and then climbed back to 75%.***

10.3.3.3 It is likely that for many who have removed their child from formal care there is the choice to continue with arrangements made, or there may even be a loss of faith in the setting's reliability.

10.3.4 During one engagement visit, the manager of the setting mentioned that without the CYP grant funding, they would not have been able to keep their setting going due to the financial impact caused by the COVID pandemic.

10.4 Changes in Work Arrangements

10.4.2 It is recognised that many larger employers, including Swansea Council themselves, will be likely to continue to offer working from home as an element of work arrangements for staff where appropriate, even if/when restrictions have fully eased.

10.4.2.1 Given that parent/carers have told us that the costs of childcare can be a barrier, it is likely that for many families, increased home / flexible working can accommodate a reduced attendance at formal childcare, which would previously not have been an option.

Sample Size	Due to COVID, are you currently operating at full capacity?	Child Minder Yes	Child Minder No	Day Care Yes	Day Care No	Based on the current situation, are you fairly confident that it would be financially sustainable to continue to run your childcare provision for	Child Minder Don't Know	Child Minder For A Year Or More	Day Care Don't Know	Day Care For A Year Or More	6 Months or less*
153		37	28	57	31		20	45	24	63	1

10.5 Temporary Closures & Relaxation of National Minimum Standards

10.5.1 Given the strain on registered provision resulting from staff absences, it was recognised that allowing settings to apply for a temporary relaxation of national minimum standards will prevent many from being unable to operate. See section 8.4 for further details.

10.6 Corrective Measures

10.6.1 It was essential that a response was made to the impact of Covid and in October 2020, a planning and response session took place involving the local authority and each of the key umbrella organisations to look at priorities. The overwhelming view was that the greatest impact was financial.

10.6.2 Given that the engagement session with development officers identified sustainability issues as settings' main concern, the funding provided by Welsh Government was particularly impactful. Equally, the local authority recognised the need to offer financial support from existing resources.

10.6.3 As detailed within the sustainability section, the Covid Relief Grants, Sustainability Grant and Temporary Closures Grants were significant in supporting settings' viability during critical periods within the pandemic.

10. Covid-19 – Summary of Key Findings

• It is evident that the picture of childcare in Swansea has been heavily impacted by Covid-19 in all aspects
• It is likely that even once restrictions end, many will continue to work from home, although research has suggested those working from home are still accessing similar levels of formal care
• As such, demand and supply data will potentially be very different in coming years
• Ensure settings continue to be sustainable following the end of any additional sustainability funding

10. Covid-19 – Action Plan

Challenge	Action	Responsible	Timescale	Outcome
10.1 Ensure settings continue to be sustainable following the end of any additional sustainability funding	10.1 Work with partners to identify whether settings are becoming reliant upon additional funding	LA & Partners	March 23	Identification of whether there is a dependency or settings are self-sufficient
10.2 Ensure children do not	10.2 Promote the value of childcare and the	LA & Partners	Ongoing	Children's right to play is not overly

lose out on essential social development through non-attendance at formal childcare	benefits of play to parents/carers whether they work away from home or at home, e.g. The Choosing Childcare booklet			impacted by lack of attendance at childcare provision Parents are better advised to make decisions on care
10.3 Need to identify whether priorities identified during Covid continue to be relevant	10.3 Ensure annual progress reports assess covid-related targets and whether they remain valid, before determining whether to maintain or remove	LA	Annually	Ensure targets remain valid

11. Population

11.1 Requirements

11.1.1 This section must include details of projected population figures for the local authority's area and the main trends and factors likely to affect those figures

11.1.2 Additionally, it must take note of demographics of local population and factors and trends that will drive demand for childcare e.g. under-fives population, lone parents, ethnicity of local population and birth rates

11.2 Data Capture

11.2.1 The primary data source for determining local population was the Census. Given that the most recent Census was undertaken in 2021, it was recognised that this would provide the most appropriate data.

11.2.2 However, once it became apparent, in February 2022, that the main 2021 Census data would not be available until April 2022, a decision was made to base the assessment on the most current available data.

11.2.3 Additionally, where 2021 Census data was subsequently available, if this impacted upon findings or recommended actions, a footnote would be added.

11.3 Key Findings

11.3.1 Population

11.3.1.1 On 25 June 2021, the Office for National Statistics (ONS) published 2020 population estimates for local authority areas in the UK. The estimates reflect the mid-point of the given year (30 June) and are published annually by ONS as a more up-to-date measure of population and change between decennial Censuses.

11.3.1.2The mid-year population estimate for 2020 for the City & County of Swansea is 246,600; comprising of 122,700 males and 123,900 females. This figure represents a decrease of approximately 400 (-0.17%) on the 2019 estimate; and compares with a small increase in the previous year (+500). Between 2014 and 2019, Swansea's increase averaged +1,200 per year.

11.3.1.3 The broad components of population change – namely births, deaths (i.e. natural change) and migration – from mid-2019 to mid-2020 are set out in Table 1 below. Analysis of the supporting data released with the population estimates suggests that Swansea's small overall population reduction during the year to June 2020 was due negative natural change (600 more deaths than births in the year) and internal (UK-based) out-migration (-1,500 net approx.), partly offset by net international in-migration (+1,800 approx.).

This identifies an overall decrease in population of 400 for Swansea over that period.

Table 1: Mid-Year Estimates 2020, components of population change since mid-2019: Swansea, Wales & UK

Area:	Mid-2019 population	*Components of Change:* Births	Deaths	Migration and other changes	**Mid-2020 population**
Swansea	247,000	+2,200	-2,800	+200	**246,600**
Wales	3,152,900	+29,400	-35,800	+23,100	**3,169,600**
UK	66,796,800	+700,700	-669,200	+252,900	**67,081,200**

Source: Mid-Year Estimates 2019-20 (rounded), ONS. Published June 2021. Note: Totals may not sum due to rounding.

11.3.2 The proportion of Swansea's population of working age (i.e. all aged 16-64), at 63.3%, is higher than Wales (61.2%) and the UK (62.4%). However, Swansea has a lower proportion of children (aged 0-15), at 16.9%, than both Wales (17.8%) and the UK (19.0%).

Figure 1:
Swansea population by life stage group, mid-2020

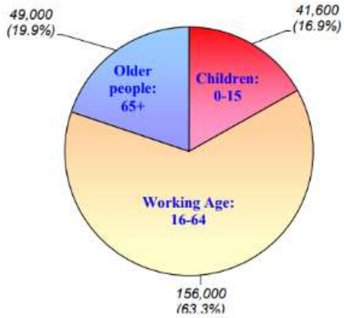
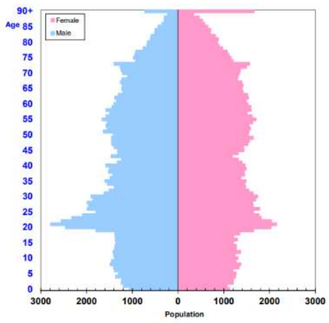


Figure 2:
Swansea population, mid-2020, by age and sex



11.3.3 The pyramid shows a large 'spike' in the 19-21 age groups, reflecting the presence of resident students at Swansea's two universities.

11.3.3.1 Using these estimates, the composition of Swansea's population by selected age group (as at mid-2020) can be compared with Wales and UK averages:

- There are 12,000 children aged 0-4 in Swansea, 4.9% of the total population – lower than the equivalent proportion for Wales (5.1%) and the UK (5.6%).
- Swansea also has a lower percentage aged 5-15, at 12.0% (29,600 children), than Wales (12.7%) and the UK (13.3%).

11.3.4 Between each decennial Census, the Office for National Statistics (ONS) publish annual population estimates every June, relating to the previous year's mid-point. The estimates are calculated by using the Census as a benchmark, and combining subsequent annual birth and death registrations data with estimates of internal (within UK) and international migration flows.

11.3.4.1From 2001 to 2019, the estimates showed successive annual increases in Swansea's population. However, the rate of population growth has slowed in recent years, with a small decrease recorded between 2019 and 2020. Between 2015 and 2020, the estimated population of Swansea has increased by 4,200 or 1.8% (from 242,300 to 246,500), an average increase of approximately 850 people (0.4%) per year.

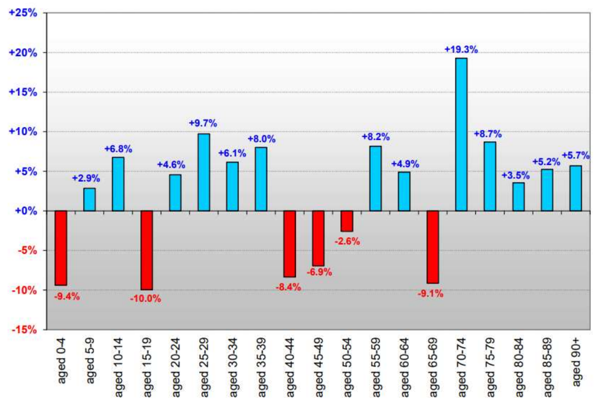
11.3.5 Population change, 2019 to 2020 by age

The estimated total population of Swansea decreased by 400 or 0.17% between 2019 and 2020. Within specific five-year age cohorts, the most significant changes over the latest year are within the following groups: (note: estimated change rounded to units of 10)

Population gains:
- Age 30-34: +490 (+3.2%)
- Age 55-59: +380 (+2.5%)
- Age 75-79: +250 (+2.7%)

Population losses:
- Age 50-54: -510 (-3.2%)
- Age 15-19: -360 (-2.5%)
- **Age 00-04: -290 (-2.4%)**

Figure 2: Population Change in Swansea by five-year age cohort, 2015-2020



Source: Mid-Year Estimates 2015-2020, Office for National Statistics (ONS).

11.3.5.1 Using a breakdown by 5-year age groups, it is notable that Swansea's 0-4, 5-9 and 10-14 age groups are all proportionately lower than the UK average, if only slightly.

Appendix 2: SWANSEA'S POPULATION (2020) BY FIVE-YEAR AGE GROUP

Age	Males	Females	All people (% of total)	Wales %	UK %
0-4	6,100	5,900	12,000 (4.9%)	5.1%	5.6%
5-9	7,100	6,500	13,500 (5.5%)	5.7%	6.2%
10-14	7,000	6,500	13,500 (5.5%)	5.8%	6.0%
15-19	7,300	6,700	14,000 (5.7%)	5.5%	5.5%
20-24	12,200	9,800	22,000 (8.9%)	6.5%	6.2%
25-29	9,600	8,400	18,000 (7.3%)	6.6%	6.7%
30-34	8,000	7,900	15,900 (6.4%)	6.2%	6.7%
35-39	7,500	7,300	14,800 (6.0%)	5.9%	6.6%
40-44	6,900	6,700	13,600 (5.5%)	5.5%	6.1%
45-49	7,100	7,600	14,700 (6.0%)	6.1%	6.4%
50-54	7,700	7,900	15,600 (6.3%)	6.8%	6.9%
55-59	7,800	8,000	15,800 (6.4%)	7.0%	6.7%
60-64	6,700	7,500	14,200 (5.7%)	6.2%	5.7%
65-69	6,100	6,800	12,900 (5.2%)	5.7%	5.0%
70-74	6,100	7,000	13,000 (5.3%)	5.7%	5.0%
75-79	4,300	5,200	9,500 (3.9%)	4.1%	3.6%
80-84	2,900	4,000	6,900 (2.8%)	2.9%	2.6%
85-89	1,600	2,600	4,200 (1.7%)	1.7%	1.6%
90+	700	1,700	2,400 (1.0%)	1.0%	0.9%
Total	**122,700**	**123,900**	**246,600** (100%)	100%	100%

Source: Mid-Year Estimates 2020, ONS. © Crown Copyright 2021.

11.3.6 WIMD DATA

The latest Welsh Index of Multiple Deprivation (WIMD 2019) was published by the Welsh Government on 27 November 2019. WIMD is the official measure of relative deprivation for small areas in Wales.

11.3.6.1 Composition of the Index

The overall Index for 2019 is again made up of eight separate types or 'domains' of deprivation, namely:

- Income
- Health
- Access to services
- Community safety
- Employment
- Education
- Housing
- Physical environment

In the 2019 Index, Swansea had an above average proportion of its LSOAs featuring in the most deprived 10% in Wales, with 17 (11.5%) of its 148 LSOAs in the 191 (10%) most deprived. In all, seven of Wales' 22 local authorities have a higher proportion of most-deprived LSOAs than Swansea (note: in 2014, Swansea had the 9th highest proportion on this basis).

- Within Swansea the number of LSOAs in the 10% most deprived LSOAs in Wales is down slightly from 18 in 2014 to 17 in 2019.
- The number and proportion of Swansea LSOAs in the most deprived 20% and the most deprived 50% in Wales has also fallen, as detailed in Table 1 below.
- However, the proportion of Swansea LSOAs in the most deprived 30% in Wales has increased to over 30% (46 of its 148 LSOAs).

Table 1: Number and % of Swansea LSOAs in the most deprived 10%, 20%, 30% and 50% in Wales

	Most deprived 10%		20%		30%		50%	
WIMD	LSOAs	% of all	LSOAs	% of all	LSOAs	% of all	LSOAs	% of all
2014	*18*	*12.2*	*37*	*25.0*	*42*	*28.4*	*72*	*48.6*
2019	17	11.5	35	23.6	46	31.1	68	45.9

In the individual domains, levels of deprivation are most significant in respect of Employment (14.9% of Swansea's LSOAs are in the 10% most deprived in Wales), followed by Income (12.8%), Health (12.2%), Education (11.5%) and Community Safety (10.1%). However, levels in the Access to Services, Physical Environment and Housing domains are below the Welsh average (for the proportion of LSOAs in the 10% most deprived in Wales).

In WIMD 2019, Townhill 2 (ranked 16 in Wales) and Townhill 1 (18 in Wales) are now the most deprived LSOAs in Swansea. In the Overall Index, Swansea's 17 most deprived LSOAs, i.e. those featuring in the most deprived 10% (191 LSOAs) in Wales, are located in the following ward areas: Townhill (5 of 6 LSOAs)
Penderry (5 of the 7 LSOAs in the ward)
Castle (2 of 10 LSOAs) Morriston (2 of 11 LSOAs)
Bonymaen (1 of 4 LSOAs - central/east)
Mynyddbach (1 of 6 LSOAs - Clase area).
Llansamlet (1 of 8 LSOAs - part Birchgrove) (Total = 17 LSOAs)

WIMD 2019 Rankings Summary

The table below lists the 20 most deprived and 10 least deprived LSOAs in Wales and Swansea. The top 20 and bottom 10 LSOAs in Swansea in terms of the individual domain rankings are also set out below. The full list is available via the web page www.swansea.gov.uk/wimd2019

Wales Rank	Overall Index (Wales)	Overall Index (Swansea)	Wales / Swa rank	Domains: Income	Employment	Health	Education	Access to Services	Housing	Community Safety	Physical Environment
1	Rhyl West 2	**Townhill 2**	16 / 1	Townhill 5	Castle 2 North	Penderry 1	Townhill 1	Gower 1	Castle 6	Castle 2 North	Pontardulais 2
2	Rhyl West 1	**Townhill 1**	18 / 2	Townhill 1	Castle 1	Townhill 2	Townhill 3	Mawr	Uplands 9	Morriston 7	Pontardulais 3
3	St. James 3	**Penderry 3**	22 / 3	Penderry 1	Penderry 3	Penderry 3	Penderry 1	Gower 2	Castle 4	Castle 4	Castle 8
4	Tylorstown 1	**Castle 1**	23 / 4	Townhill 2	Townhill 2	Townhill 1	Townhill 2	Townhill 2	Landore 4	Castle 7 East	Llansamlet 7
5	Caerau 1	**Penderry 1**	31 / 5	Townhill 3	Mynyddbach 1	Castle 1	Penderry 5	Townhill 1	Uplands 4	Llansamlet 1	Uplands 8
6	Penrhiwceiber 1	**Townhill 3**	32 / 6	Penderry 3	Penderry 4	Castle 2 North	Townhill 6	Castle 2 North	Uplands 6	Cockett 7	Cwmbwrla 3
7	Penydarren 1	**Castle 2 North**	36 / 7	Castle 1	Townhill 6	Mynyddbach 1	Penderry 4	Penderry 1	Uplands 7	Mynyddbach 1	Castle 7 West
8	Twyn Carno 1	**Mynyddbach 1**	37 / 8	Mynyddbach 1	Townhill 5	Townhill 3	Townhill 5	Castle 5	Cwmbwrla 1	Landore 2	Cwmbwrla 1
9	Queensway 1	**Townhill 5**	41 / 9	Castle 2 North	Townhill 1	Bonymaen 1	Mynyddbach 1	St. Thomas 1	Castle 5	Castle 3	Castle 4
10	Pillgwenlly 4	**Penderry 4**	48 / 10	Penderry 4	Morriston 5	Townhill 5	Penderry 3	Penderry 3	Uplands 8	Penderry 3	Cwmbwrla 2
11	Rhyl West 3	**Townhill 6**	58 / 11	Townhill 6	Bonymaen 1	Townhill 6	Penderry 6	Mynyddbach 1	Castle 8	Cockett 8	Landore 4
12	Splott 6	**Bonymaen 1**	81 / 12	Morriston 5	Townhill 3	Penderry 4	Bonymaen 1	Penderry 4	Cwmbwrla 2	Penderry 6	Landore 3
13	Trowbridge 8	**Morriston 5**	95 / 13	Bonymaen 1	Cockett 2	Penderry 6	Penderry 2	Castle 2 South	Cwmbwrla 3	Castle 7 West	Llansamlet 3
14	Ely 5	**Penderry 2**	147 / 14	Penderry 2	Sketty 4	Morriston 9	Castle 1	Castle 7 East	Morriston 7	Townhill 5	Castle 3
15	Pen-y-waun 2	**Morriston 7**	154 / 15	Penderry 5	Penderry 1	Cockett 2	Llansamlet 8	Townhill 6	Landore 1	Penderry 1	Morriston 1
16	**Townhill 2**	**Penderry 6**	157 / 16	Penderry 6	Penderry 2	Morriston 5	Penderry 7	Morriston 5	Uplands 3	Castle 1	Uplands 4
17	Tyisha 2	**Llansamlet 8**	179 / 17	Morriston 7	Morriston 7	St. Thomas 1	Cockett 8	Penllergaer 2	Castle 3	Penderry 4	Castle 2 South
18	**Townhill 1**	**Penderry 5**	201 / 18	Cockett 8	Llansamlet 8	Llansamlet 8	Castle 5	Townhill 5	Morriston 9	Llansamlet 2	Castle 1
19	Rhyl South West 2	**Morriston 9**	205 / 19	Llansamlet 8	West Cross 3	Cockett 8	Morriston 9	Castle 1	St. Thomas 2	Morriston 6	West Cross 2
20	Glyn 2	**Cockett 8**	207 / 20	Clydach 3	Penderry 6	Penyrheol 4	Castle 3	Penderry 5	St. Thomas 1	Morriston 9	Bonymaen 2
1900	*Radyr & Morg'town 3*	***Kingsbridge 2***	*1851 / 139*	*West Cross 1*	*Oystermouth 3*	*Uplands 5*	*Uplands 7*	*Killay North 2*	*Newton 1*	*Pennard 1*	*Gorseinon 2*
1901	*Marford & Hoseley 1*	***Mayals 1***	*1858 / 140*	*Uplands 9*	*West Cross 1*	*Sketty 8*	*Uplands 5*	*Morriston 8*	*Llangyfelach 1*	*Bishopston 1*	*Upper Loughor 2*
1902	*Bryntirion L & MM 4*	***Sketty 8***	*1881 / 141*	*Bishopston 1*	*Killay 3*	*Mayals 1*	*Killay North 2*	*Sketty 6*	*Kingsbridge 2*	*Llangyfelach 1*	*West Cross 4*
1903	*St. Kingsmark 1*	***Killay 3***	*1885 / 142*	*Llangyfelach 3*	*Uplands 7*	*Killay North 2*	*Oystermouth 3*	*West Cross 1*	*Llansamlet 2*	*Llansamlet 3*	*Clydach 3*
1904	*Pont-y-clun 2*	***West Cross 1***	*1893 / 143*	*Sketty 9*	*Mayals 1*	*Newton 2*	*Mayals 2*	*West Cross 2*	*Llangyfelach 3*	*Fairwood 1*	*Sketty 4*
1905	***Newton 1***	***Bishopston 1***	*1895 / 144*	*Kingsbridge 2*	*Newton 1*	*Newton 1*	*Bishopston 1*	*Sketty 1*	*Mayals 1*	*Dunvant 3*	*Pennard 1*
1906	***Mayals 2***	***Killay North 2***	*1897 / 145*	*Sketty 8*	*Sketty 8*	*Pennard 2*	*West Cross 1*	*Killay South 1*	*Castle 2 South*	*Newton 1*	*Pennard 2*
1907	*Church Village 3*	***Pennard 2***	*1898 / 146*	*Newton 1*	*Mayals 2*	*Bishopston 1*	*Newton 2*	*Pennard 2*	*Newton 2*	*Mayals 2*	*Dunvant 2*
1908	*Marford & Hoseley 2*	***Newton 1***	*1905 / 147*	*Mayals 2*	*Uplands 9*	*Oystermouth 3*	*Sketty 8*	*Gowerton 2*	*Sketty 2*	*Pennard 2*	*Fairwood 2*
1909	*Mold South 2*	***Mayals 2***	*1906 / 148*	*Penllergaer 1*	*Sketty 9*	*Mayals 2*	*Newton 1*	*Oystermouth 3*	*Mayals 2*	*Killay North 2*	*Fairwood 1*

Source: Welsh Index of Multiple Deprivation 2019 (published 27 November 2019), Welsh Government.

Notes:
a.) **High ranked (most deprived) LSOAs** *(excluding those in Swansea)*: Rhyl West and Rhyl South West are in Denbighshire local authority area; St. James and Twyn Carno are in Caerphilly; Tylorstown, Penrhiwceiber and Pen-y-waun are in Rhondda Cynon Taf; Caerau is in Bridgend; Penydarren is in Merthyr Tydfil; Queensway is in Wrexham; Pillgwenlly is in Newport; Splott, Trowbridge and Ely are in Cardiff; Tyisha is in Carmarthenshire; Glyn is in Conwy.
b.) **Low ranked LSOAs** *(excluding those in Swansea)*: Mold South is in Flintshire; Marford and Hoseley is in Wrexham; Church Village and Pont-y-clun are in Rhondda Cynon Taf; St. Kingsmark is in Monmouthshire; Bryntirion Laleston and Merthyr Mawr is in Bridgend; Radyr & Morganstown is in Cardiff.

11.3.7 Conclusions

- Swansea remains slightly above the Welsh average for local authorities with LSOAs in the 10% most deprived; although this proportion has fallen slightly since WIMD 2014.
- Townhill, Penderry, Castle and Morriston remain the wards in Swansea with more than one LSOA in the 10% most deprived.
- Swansea now has two LSOAs in the 20 most deprived LSOAs in Wales, and 13 in the 100 most deprived (in WIMD 2014, these figures were 0 and 11).
- Equally, several wards fall into some of the least deprived in Wales, suggesting Swansea is an area of extremes of deprivation.
- In terms of access to services, the two wards of Gower and Mawr are identified as most deficient.

11.3.8 Implications for Childcare Requirements

- As Swansea has a higher than average level of deprivation, costs of childcare will be a factor, as is childcare's contribution to supporting families access employment and training.
- Consideration will need to be given to costs of childcare in the most deprived area, which will have implications for providers who will likely have similar costs, i.e. staffing and resources. This suggests potential for support for settings who offer reduced pricing or similar.
- With Gower and Mawr identified as most deficient in terms of access to services, their lack of childcare provision becomes more significant.

11.4 Swansea Economic Profile April 2021

11.4.1 It is important to have an understanding of the economic make-up of the area to determine whether current provision will best meet need.

Indicator	Area	Latest value	Index (UK=100)	annual % change
Economic Activity Rate (working age, period to Dec-20)	Swansea	75.4%	96	+2.5%
	Wales	75.7%	96	-1.6%
	UK	78.9%	100	+0.4%
Employment Rate (working age, period to Dec-20)	Swansea	71.5%	95	+1.2%
	Wales	72.8%	97	-1.2%
	UK	75.3%	100	-0.3%
Employment (workplace estimates, 2019)	Swansea	112,000	n/a	-0.9%
	Wales	1,332,000		-0.5%
	GB	31,088,000		+1.1%
Unemployment Rate (modelled est, period to Dec-20)	Swansea	4.3%	96	-5.7%
	Wales	3.7%	82	-9.7%
	UK	4.5%	100	+17.5%
Business stocks (active businesses, 2019)	Swansea	7,780	n/a	+3.3%
	Wales	103,770		+1.4%
	UK	2,990,320		+2.5%
GVA per head (2018) – Gross Value Added	Swansea	£21,912	77	+2.2%
	Wales	£20,738	73	+2.9%
	UK	£28,729	100	+2.7%
GDHI per head (2018) – Gross Disposable Household Income	Swansea	£15,755	75	+4.1%
	Wales	£17,100	81	+4.4%
	UK	£21,109	100	+4.6%
Earnings (full-time gross weekly, 2020)	Swansea	£538.00	92	-4.6%
	Wales	£541.70	93	+0.3%
	UK	£585.50	100	+0.1%
House prices (average sale price, Feb-21)	Swansea	£169,324	68	+11.3%
	Wales	£179,861	72	+8.4%
	UK	£250,341	100	+8.6%
Housing transactions (quarter ending Nov-20)	Swansea	747	n/a	-13.8%
	Wales	10,417		-18.0%
	UK	250,149		-6.7%

The summary table details a range of economic factors associated with Swansea. It demonstrates a reduction in both economic activity and employment rate both overall and in relation to Wales and the UK.

Weekly earnings in Swansea also dropped by 4.6% in a year as of February 2021.

11.4.2 This additional table adds further context to this analysis. Swansea's proportion of economically inactive at 24.6% is slightly higher than the Wales average, which in turn is high than the UK average of 21.1%

Notably, 62,300 men compared to 56,300 women in Swansea are economically active. An assumption can be made here that there are gender-based links to having responsibility for caring for and raising children, although this is not detailed.

The latest data on the structure of Swansea's workforce, using data from the Office for National Statistics' (ONS) Annual Population Survey, suggests that economic activity and employment rates in Swansea are lower than the Wales averages and further below equivalent UK rates. However, the large proportion of students resident in Swansea has some effect on these figures.

Area	Population aged 16 and over	Working Age (all aged 16-64)	Economically Active (aged 16 & over)	Economic Activity Rate (working age)
Swansea: Total	**201,500**	**153,700**	**118,600**	**75.4%**
Men	102,100	80,200	62,300	76.2%
Women	99,500	73,500	56,300	74.5%
Wales	2,558,800	1,895,200	1,496,700	**75.7%**
United Kingdom	53,580,000	41,428,500	33,999,000	**78.9%**

Area	Employment (aged 16 & over)	Employment Rate (working age)	Economically Inactive (working age)	Economic Inactivity Rate (working age)
Swansea: Total	**112,500**	**71.5%**	**37,800**	**24.6%**
Men	59,500	72.7%	19,100	23.8%
Women	53,000	70.1%	18,700	25.5%
Wales	1,444,100	**72.8%**	460,300	**24.3%**
United Kingdom	32,459,100	**75.3%**	8,735,400	**21.1%**

11.4.3 Additionally, it is beneficial to look at which sectors of employment are prevalent. Notably, manufacturing is lower in Swansea than Wales and UK, but services is higher.

As the major commercial centre of South West Wales, Swansea has higher percentages of employment in the service sectors and corresponding lower manufacturing employment. There is also a higher proportion of people working part-time and lower rates of self-employment.

Area	Unemployment (aged 16 & over)	Unempl. rate (econ. active aged 16+)	Self-employed (aged 16 & over)	% self-employed (of all in employment)
Swansea	6,100	5.1%	13,100	11.7%
Wales	55,800	3.7%	198,400	13.8%
United Kingdom	1,539,900	4.5%	4,558,600	14.0%

Area	Work Part-time (working age)	% working Part-time (of working age empl.)	% working in Manufacturing (of all in employment)	% working in Services (total) (of all in employment)
Swansea	29,800	27.2%	6.5% (7,300)	86.5% (97,300)
Wales	337,800	24.5%	9.5%	79.1%
United Kingdom	7,419,600	23.8%	8.6%	81.7%

Source: *Annual Population Survey (APS) data for the 12 month period ending December 2020. Office for National Statistics (ONS).*

11.4.4 Noting employment by industry, the major areas of industry are Health with 17% and public administration and defence with 11.6%. Unsurprisingly, BRES workplace estimates reflect a higher than average proportion of administrative jobs, as well as 28.2% working in the public sector.

Employment by Industry

Workplace employment estimates are available via the Business Register and Employment Survey (BRES), an annual business survey undertaken by ONS which collects employment information. BRES data is currently available for the years 2009 to 2019.

The Swansea economy has a proportionately large share of jobs in the public administration, health, education, financial services and retail sectors. Of the 112,000 people in employment within Swansea (2019), an estimated 88.4% (99,000) are employed in the service sectors (SICs G-U in the table below), with 28.2% working within the public sector (see note v. below). In Wales, the proportion employed by the service sectors is lower, at 79.4%, with 23.2% in the public sector. The manufacturing and construction sectors employ approximately 10,000 in total; with both sectors' share of employment in Swansea below the averages for Wales and Great Britain.

Employment by Broad Industry Group ('open access' data)	Swansea (total)	Swansea (%)	Wales (%)	GB (%)
1: Agriculture, forestry & fishing (industry section A)	900	0.8	3.2	1.6
2: Mining, quarrying & utilities (B, D and E)	1,250	1.1	1.7	1.3
3: Manufacturing (C)	5,000	4.5	10.7	7.8
4: Construction (F)	5,000	4.5	4.9	5.0
5: Motor trades (Part G)	3,000	2.7	2.4	1.9
6: Wholesale (Part G)	3,500	3.1	3.3	3.8
7: Retail (Part G)	11,000	9.8	9.5	9.2
8: Transport & storage (inc postal) (H)	3,000	2.7	3.3	4.8
9: Accommodation & food services (I)	9,000	8.0	9.2	7.6
10: Information & communication (J)	2,500	2.2	2.1	4.2
11: Financial & insurance (K)	5,000	4.5	2.4	3.4
12: Property (L)	1,500	1.3	1.4	1.9
13: Professional, scientific & technical (M)	4,500	4.0	5.0	8.8
14: Business administration & support services (N)	9,000	8.0	6.3	8.7
15: Public administration & defence (O)	13,000	11.6	7.2	4.2
16: Education (P)	11,000	9.8	8.6	8.4
17: Health (Q)	19,000	17.0	15.1	12.8
18: Arts, entertainment, recreation & other services (R-U)	4,000	3.6	3.6	4.5
TOTAL *(SIC 2007 Broad Group A-U)*	**112,000**	100	100	100

Source: *Business Register and Employment Survey (BRES) workplace employment analysis, 2019. ONS.*

11.4.2 In terms of occupation, 'professional occupations' account for over 1/4, but there is an even split across the key employment groups.

Analysis of employment by occupation using the latest resident-based estimates from the Annual Population Survey tends to reinforce Swansea's role as a regional service centre, with higher proportions (than Wales and UK) employed in occupations associated with the service sector, including professional, caring/leisure and sales/customer service occupations. The equivalent Swansea workplace data (also included in the table below) shows variation with residence-based figures in some categories but a broadly similar overall pattern.

Residents in employment who are: (SOC 2010 Major Group)	**Swansea total**	**Swansea %**	**Wales %**	**UK %**	***Swansea*** *(workplace %)*
1: Managers, directors and senior officials	10,600	9.4	10.2	11.4	*(8.5)*
2: Professional occupations	28,500	25.4	20.3	22.8	*(24.3)*
3: Associate professional and technical occ's	15,800	14.0	14.6	15.7	*(14.1)*
4: Administrative and secretarial occupations	10,900	9.7	9.9	10.1	*(12.3)*
5: Skilled trades occupations	8,300	7.4	10.5	9.2	*(6.8)*
6: Caring, leisure and other service occ's	11,500	10.2	9.8	8.9	*(9.2)*
7: Sales and customer service occupations	9,400	8.3	8.0	6.9	*(9.3)*
8: Process plant and machine operatives	7,100	6.3	6.3	5.5	*(5.5)*
9: Elementary occupations	10,200	9.1	9.9	9.2	*(10.0)*
TOTAL (SOC 2010 Major Group 1-9)	**112,500**	100	100	100	*(100)*

Source*: Annual Population Survey (APS) data for the 12 month period ending December 2020, ONS.*

Notes:
i. The Annual Population Survey (APS) is a sample survey of households living at private addresses in the UK. These APS figures relate to where people live (i.e. residence-based estimates), apart from the workplace data in the right hand column.
ii. The 2010 Standard Occupational Classification (SOC 2010) contains a four level hierarchy of occupations, from the above Major Groups to more specific four-digit Unit Groups. SOC 2010 is also the main component of the National Statistics Socio-economic Classification (NS-SEC).
iii. Columns may not sum due to rounding.

11.4.5 Whilst not specifically about the workforce, it is useful to look at the number and type of businesses in operation. Headline statistics include Swansea's 13.4% retail compared to a 9.4% Wales average and a lower than average (12.7% compared to Wales average of 14.7%) within construction.

4. BUSINESS ACTIVITY

Statistics on the number of active businesses or enterprises, and business 'births' and 'deaths', are produced annually by ONS. These statistics, available at local authority level, act as a guide to the pattern of business activity, start-ups and closures in the reference year, 2019.

The stock of active businesses in Swansea grew by 250 (+3.3%) to 7,780 between 2018 and 2019, with 1,290 recorded business births and 845 deaths. Over the year, the total stock of businesses increased by 1.4% in Wales and by 2.5% in the UK. Business 'birth rate' and 'death rate' statistics are also available, as shown in the table below, together with a breakdown of active business stocks by broad industry group for Swansea, Wales and the UK. The most represented sector groups in Swansea in 2019 were 'Retail' (13.4% of business stock, higher than Wales/UK averages), 'Construction' (12.7%), and 'Professional, scientific & technical' (12.5%).

Active businesses: Stock, births and deaths	**Swansea** (total)	**Swansea** (%)	**Wales** (%)	**UK** (%)
Production (includes manufacturing)	495	6.4	7.2	5.8
Construction	990	12.7	14.7	13.4
Motor Trades	280	3.6	3.9	2.9
Wholesale	230	3.0	3.3	3.9
Retail	1,045	13.4	9.4	8.0
Transport & storage (incl. postal)	385	4.9	5.5	4.8
Accommodation & food services	725	9.3	9.7	6.3
Information & communication	405	5.2	5.2	8.8
Finance & insurance	115	1.5	1.5	1.6
Property	325	4.2	3.3	4.3
Professional; scientific & technical	970	12.5	13.6	18.2
Business administration and support services	795	10.2	9.7	10.2
Education	95	1.2	1.5	1.5
Health	345	4.4	4.4	3.8
Arts; entertainment; recreation; other services	580	7.5	7.1	6.5
Stock of active businesses (2019)	**7,780**	100	100	100
Business Births / *Birth Rate* *(2019)*	1,290	*16.6*	*11.8*	*13.0*
Business Deaths / *Death Rate* *(2019)*	845	*10.9*	*10.4*	*11.2*

Sources*: 'Business demography, UK: 2019', ONS.*

Notes:
i. This analysis is based on business demography statistics for 2019 published by the Office for National Statistics (ONS) on 17 November 2020. The active business stock data by industry type was published by Welsh Government on 19 January 2021.
ii. The figures only represent an approximate estimate of the actual number of businesses, start-ups and closures in an area. The definition of an active business in this release is based on activity at any point in the year.
iii. The latest estimates on births, deaths and survivals are subject to revision, usually in the following year's publication.
iv. The above business birth and death rates are derived as the percentage of stock in 2019.
v. Numbers have been rounded at source, to the nearest five, to prevent disclosure.

11.5 Earnings

11.5.1 Whilst noted previously, earnings figures need to be considered within this section. It is interesting that males in Swansea earn less than the Wales and UK averages but females earn higher, and notably earn more than their male counterparts.

Earnings

The Annual Survey of Hours and Earnings (ASHE) provides information about the levels, distribution and make-up of earnings and hours worked for employees to local authority level. Data for specific industries and occupations is also available at higher geographic levels.

The latest median weekly full-time earnings figure for residents in Swansea stands at £538.00 (April 2020); which is 0.7% lower than the Wales figure but 8.1% below the UK average. The published workplace-based full-time weekly earnings figure for Swansea is around £6 per week lower than the resident-based figure, as shown in the table below.

WEEKLY earnings	**Swansea**	**Swansea** (% of Wales)	**Wales**	**UK**	***Swansea*** *(Workplace)*
FULL-TIME employees *% change on previous year*	£538.00 -4.6%	99.3 -	£541.70 +0.3%	£585.50 +0.1%	*£531.90* *+2.5%*
Male full-time	£534.80	95.1	£562.40	£619.00	*£521.10*
Female full-time	£551.90	107.1	£515.40	£543.00	*£534.80*
PART-TIME employees	£201.50	96.3	£209.30	£202.80	*£212.70*
ALL employees	£444.80	99.3	£447.80	£479.10	*£447.30*

Source: *Annual Survey of Hours and Earnings (ASHE) 2020, ONS.*

Over the latest year period (April 2019 to April 2020), the survey estimates suggest that full-time weekly earnings in Swansea fell by 4.6%, whilst figures for Wales and the UK remained relatively constant.

11.5.2 As expected, this trend is replicating when showing annual earnings. As noted, Swansea experienced a decline in average annual salary which wasn't mirrored across Wales and the UK.

Annual earnings data is also available from ASHE. The Swansea median full-time figure (2020) of £27,480 is 2.8% lower than the Wales average, although both Swansea and Wales figures are below the UK average (in Swansea by 12.6%). Over the last year, average annual full-time earnings in Swansea fell by 2.3%, whilst Wales and UK figures increased – as shown below.

ANNUAL earnings	**Swansea**	**Swansea** (% of Wales)	**Wales**	**UK**	***Swansea*** *(Workplace)*
FULL-TIME employees *% change on previous year*	£27,480 -2.3%	97.2 -	£28,273 +1.5%	£31,461 +3.6%	*£27,058* *-0.6%*
Male full-time	£26,747	89.2	£30,000	£33,923	*£26,534*
Female full-time	£29,089	110.7	£26,287	£27,981	*£28,039*
PART-TIME employees	£11,004	96.1	£11,455	£11,234	*£11,511*
ALL employees	£23,164	97.9	£23,665	£25,780	*£22,833*

Source: *Annual Survey of Hours and Earnings (ASHE) 2020, ONS.*

Notes:

i. ASHE is conducted in April each year to obtain information about the levels, distribution and make-up of earnings and hours worked for employees. The latest estimates (2020 provisional) were published on 3 November 2020.

ii. The ASHE figures are available on a resident and workplace basis. The figures in the above tables are resident-based (i.e. the average earnings of adults living within the area) with the exception of the '*Swansea (Workplace)*' column.

iii. The headline statistics for ASHE are based on the median rather than the mean. The median is the value below which 50 per cent of employees fall. It is ONS' preferred measure of average earnings as it is less affected by extreme values and because of the skewed distribution of earnings.

iv. The earnings information presented relates to gross pay before tax, National Insurance or other deductions, and excludes payments in kind. It is restricted to earnings for the survey pay period (excluding arrears) that included 22 April 2020.

v. At this time, approx. 8.8 million employees nationally were furloughed under the Coronavirus Job Retention Scheme (CJRS); these estimates include furloughed employees and are based on actual payments made to the employee from company payrolls and the hours on which this pay was calculated, which in the case of furloughed employees are their usual hours.

vi. The original 2019 results have been revised by ONS as part of this release. Annual %-changes are based on the revised data.

11.6 Unemployment

11.6.1 Statistics showing percentages claiming unemployment allowances by ward demonstrate how all but 4 of the 36 wards have unemployment between 0.9 and 5.1%. This jumps to more than double with Townhill, with Penderry a noteworthy 8.8%. Almost half the wards are under 3%.

11.6.2 A positive is that every ward has recorded a reduction in unemployment from the previous year as much as 55% although notably the lowest improvement was also in Townhill.

Claimant count by Ward in Swansea: 9 September 2021 (ranked by People Rate %)

Electoral Ward:	Men	Rate %	Women	Rate %	People	Rate %	Change on year
Townhill	290	11.5	290	9.5	**580**	**10.4**	-40 (-6%)
Penderry	380	10.3	300	7.4	**675**	**8.8**	-155 (-19%)
Castle	750	9.1	285	5.4	**1,035**	**7.7**	-160 (-13%)
Landore	210	8.9	130	5.3	**345**	**7.1**	-40 (-10%)
Bonymaen	140	5.9	105	4.4	**245**	**5.1**	-90 (-27%)
St. Thomas	155	5.1	130	4.9	**285**	**5.0**	-80 (-22%)
Morriston	300	5.9	200	3.8	**500**	**4.8**	-190 (-28%)
Mynyddbach	140	5.2	110	4.2	**250**	**4.7**	-55 (-18%)
Cwmbwrla	140	5.5	100	3.9	**240**	**4.7**	-90 (-27%)
West Cross	90	5.2	75	4.2	**165**	**4.7**	-45 (-21%)
Cockett	215	4.8	185	4.1	**400**	**4.5**	-135 (-25%)
Clydach	110	5.0	90	3.8	**200**	**4.4**	-100 (-33%)
Gorseinon	90	5.9	40	2.8	**130**	**4.4**	-70 (-35%)
Penyrheol	80	4.3	55	3.0	**135**	**3.7**	-50 (-27%)
Uplands	295	4.0	135	2.5	**430**	**3.4**	-70 (-14%)
Llansamlet	175	3.7	145	2.9	**320**	**3.3**	-145 (-31%)
Sketty	185	4.1	110	2.5	**295**	**3.3**	-75 (-20%)
Pontarddulais	80	3.9	55	2.6	**130**	**3.2**	-60 (-32%)
Oystermouth	45	3.9	30	2.5	**75**	**3.2**	-20 (-21%)
Upper Loughor	30	3.6	20	2.3	**50**	**2.9**	-30 (-38%)
Dunvant	35	2.8	35	2.7	**70**	**2.8**	-25 (-26%)
Penllergaer	35	3.6	20	2.1	**55**	**2.8**	-15 (-21%)
Lower Loughor	25	3.9	15	1.9	**40**	**2.8**	-35 (-47%)
Gowerton	55	3.3	30	1.7	**80**	**2.5**	-65 (-45%)
Penclawdd	35	3.4	15	1.5	**50**	**2.5**	-35 (-41%)
Mawr	15	2.9	10	2.0	**25**	**2.5**	-20 (-44%)
Kingsbridge	30	2.5	30	2.1	**60**	**2.3**	-20 (-25%)
Fairwood	25	3.1	10	1.4	**35**	**2.2**	-25 (-42%)
Killay South	20	3.1	5	1.0	**25**	**2.1**	-10 (-29%)
Pennard	10	1.8	15	2.2	**25**	**2.0**	-20 (-44%)
Bishopston	15	2.1	15	1.5	**30**	**1.8**	-20 (-40%)
Newton	20	2.2	10	1.2	**30**	**1.7**	-20 (-40%)
Llangyfelach	30	1.9	20	1.1	**50**	**1.5**	-60 (-55%)
Mayals	5	1.1	10	1.6	**20**	**1.4**	-5 (-20%)
Gower	20	1.9	5	0.7	**25**	**1.3**	-25 (-50%)
Killay North	10	1.1	5	0.7	**15**	**0.9**	-5 (-25%)
Total	*4,275*	*5.4*	*2,840*	*3.7*	***7,120***	***4.5***	*-2,110 (-23%)*

Source: Department for Work and Pensions (DWP) administrative systems, ONS / Nomis, 12 October 2021.

Notes:
- The claimant rates are ONS' published estimates calculated using the resident working age population aged 16-64 by electoral ward.
- In this table, wards are ranked in order of claimant unemployment rate (all people), high to low.
- Claimant count data is published rounded to the nearest 5, and any # values shown are those suppressed by ONS.
- Local area claimant data is also available on the basis of ONS' Super Output Area (SOA) geography, e.g. by LSOA (Lower layer SOA).

11.6.3 When comparing by gender, there are far more men registered as unemployed than women. Notably, the percentages between Swansea East (5.3%) and Swansea West (5.1%) are very similar. Traditionally, Swansea has been viewed as an area with *'an East-West divide'.*

Swansea's overall rates of unemployment are lower than the UK average.

Claimant count unemployment: 9 September 2021 (data not seasonally adjusted unless stated)

SWANSEA (City & County)	People	Rate %	Change on quarter		Change on year	
Men	4,275	5.4	-415	(-8.8%)	-1,310	(-23.5%)
Women	2,840	3.7	-175	(-5.8%)	-800	(-22.0%)
People	**7,120**	**4.6**	**-585**	**(-7.6%)**	**-2,110**	**(-22.9%)**

Other areas:	People	Rate %	Change on quarter		Change on year	
Swansea TTWA*	11,175	4.4	-900	(-7.5%)	-3,630	(-24.5%)
Gower PCA**	1,395	3.0	-195	(-12.3%)	-720	(-34.0%)
Swansea East PCA**	2,840	5.3	-250	(-8.1%)	-860	(-23.2%)
Swansea West PCA**	2,880	5.1	-145	(-4.8%)	-535	(-15.7%)
WALES (unadjusted)	86,075	4.4	-8,975	(-9.4%)	-29,845	(-25.7%)
Seasonally adjusted	*86,935*	*4.5*	*-8,131*	*(-8.6%)*	*-29,147*	*(-25.1%)*
UK (unadjusted)	2,079,275	5.0	-206,720	(-9.0%)	-576,840	(-21.7%)
Seasonally adjusted	*2,112,830*	*5.0*	*-187,953*	*(-8.2%)*	*-548,886*	*(-20.6%)*

Source: Department for Work and Pensions (DWP) administrative systems, ONS / Nomis, 12 October 2021.

Notes:
- The count includes people who claim Jobseeker's Allowance (JSA), plus claimants of Universal Credit (UC) who are required to seek work.
- Claimant count rates are expressed as a percentage of the resident working age population aged 16-64.
- Swansea TTWA*: Travel to Work Area (2011 Census based); PCA**: the three Parliamentary or Assembly Constituency Areas in Swansea.
- Seasonally adjusted data is available for UK countries and regions, but not local areas (e.g. local authorities, constituencies, wards).

National unemployment statistics: June 2021 to August 2021

Unemployment (LFS):		People	Rate %	Change on quarter		Change on year	
WALES:	Men	33,000	4.0	-6,000	-15.1%	-5,000	-12.4%
	Women	30,000	4.1	+10,000	+46.9%	+9,000	+45.9%
	People	**63,000**	**4.0**	**+4,000**	**+6.2%**	**+5,000**	**+8.2%**
UK:	Men	821,000	4.6	-43,000	-5.0%	-57,000	-6.5%
	Women	689,000	4.3	-83,000	-10.8%	+24,000	+3.6%
	People	**1,510,000**	**4.5**	**-126,000**	**-7.7%**	**-33,000**	**-2.2%**

Source: Labour Force Survey (LFS), ONS. From "Labour market statistics" UK/Wales releases 12 October 2021.

Notes: Data is seasonally adjusted. Levels and rates are for those aged 16 and over. The rate is expressed as a proportion of all economically active people. The LFS figures use the ILO definition of unemployment where people are: without a job, have actively sought work in the last four weeks and are available to start work in the next two weeks; or are out of work, have found a job and are waiting to start it in the next two weeks.

11.6.4 An analysis of unemployment trends over the past two years shows that the reduction between 2020 and 2021 belies any overall increase from 2019. It is likely that this large increase and subsequent reduction can at least in part be attributed to Covid-19 and associated measures.

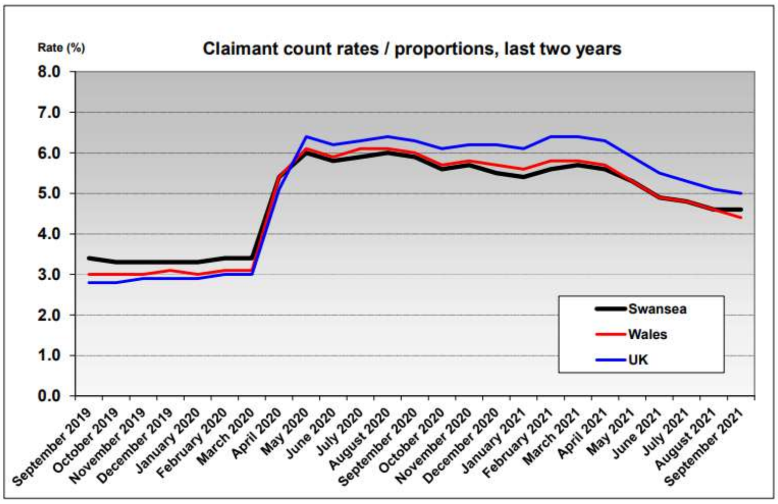
Cyngor Abertawe Swansea Council

CLAIMANT COUNT UNEMPLOYMENT TRENDS: to September 2021

CLAIMANT COUNT UNEMPLOYMENT TRENDS: last 2 years

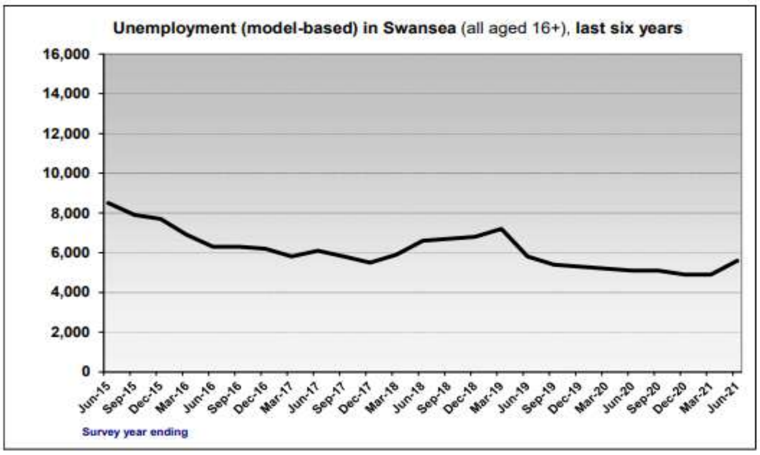
	Swansea: total	rate (%)	Wales (%)	UK (%)
September 2019	5,330	3.4	3.0	2.8
October 2019	5,230	3.3	3.0	2.8
November 2019	5,215	3.3	3.0	2.9
December 2019	5,200	3.3	3.1	2.9
January 2020	5,185	3.3	3.0	2.9
February 2020	5,320	3.4	3.1	3.0
March 2020	5,335	3.4	3.1	3.0
April 2020	8,425	5.4	5.4	5.1
May 2020	9,300	6.0	6.1	6.4
June 2020	8,995	5.8	5.9	6.2
July 2020	9,225	5.9	6.1	6.3
August 2020	9,345	6.0	6.1	6.4
September 2020	9,230	5.9	6.0	6.3
October 2020	8,725	5.6	5.7	6.1
November 2020	8,860	5.7	5.8	6.2
December 2020	8,655	5.5	5.7	6.2
January 2021	8,405	5.4	5.6	6.1
February 2021	8,795	5.6	5.8	6.4
March 2021	8,835	5.7	5.8	6.4
April 2021	8,780	5.6	5.7	6.3
May 2021	8,265	5.3	5.3	5.9
June 2021	7,705	4.9	4.9	5.5
July 2021	7,555	4.8	4.8	5.3
August 2021	7,250	4.6	4.6	5.1
September 2021	**7,120**	**4.6**	**4.4**	**5.0**
Change on year	-2,110	*-22.9%*	*-25.7%*	*-21.7%*
Change: 2 years	+1,790	*+33.6%*	*+50.2%*	*+78.5%*

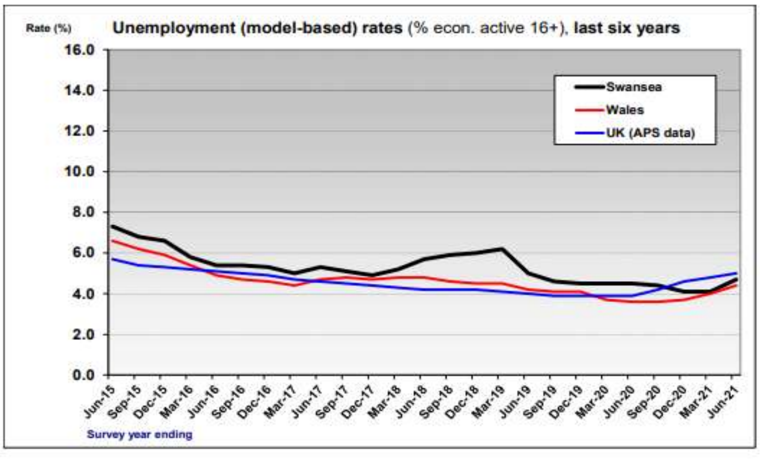
11.6.5 The point about claimant figure rises being contributed to by the Covid-19 pandemic are supported by the following graph which shows a significant rise between March and May 2020 that was reflected across Wales and the UK.



As at 18th January 2022

11.6.6 Unemployment trends over the past 6 years generally reflect Wales and UK trends with a disproportionate rise locally between March 2018 and 2019 which was off-set in 2019.





11.5 Population Key Findings

- Swansea's population decreased slightly between 2019 and 2020
- It has a higher than average* proportion of working age (16-64) people
- There is a lower than average* proportion of children aged 0-15
- There has been a drop of 2.4% in the number of 0-4 year olds from 2019 to 2020
- Swansea has a higher numbers of deprived areas than the Welsh average
- Average salary for women in Swansea is higher than men which bucks Wales and UK figures.
- Additionally, there is considerable diversity between the most and least deprived
- It's most populated industries are health with 17% and public administration at 16%
- Swansea has a proportionately low average income*

** Average relates to both Swansea and UK*

11.6 It is noteworthy that the demographic of the consultation respondents does not truly reflect the diverse nature of Swansea's population. This will need to be addressed going forward.

11. Population – Summary of Key Findings

- Given the large number of deprived communities, planning towards childcare sufficiency needs to recognise that costs of childcare in these areas will be a barrier
- Statistics from 2019 to 2020 suggest a reduction in 0-4 year olds which will impact on childcare requirements
- Given that health and public administration equate to 1/3 of overall occupations within Swansea, it may be beneficial to gain additional input on childcare needs, particularly with the potential for unsociable hours working.
- Notably there is a much higher proportion of men in employment compared to women, yet women earn more on average within Swansea (unlike other areas). There are likely to be childcare-related implications of this.

11. Population – Action Plan

Challenge	Action	Responsible	Timescale	Outcome
11.1 The high proportion of deprived LSOA's and providing affordable childcare	11.1 Work within Townhill, Penderry and other deprived areas to increase affordable childcare opportunities	LA & Partners, Local Area Coordination	March 24	Families in priority areas feel more able to use formal childcare
11.2 Given high employment in health, it is important that	11.2 Undertake additional engagement with local health board to assess sufficiency	LA	March 23	Increased understanding of childcare needs of key sector

provision meets need				
11.3 With fewer females than males in employment, yet earning more, does childcare act as a gender-related barrier to earning?	11.3 Additional consultation to identify childcare / career choices	LA	March 24	Identification of whether potential high earners are prevented from employment due to care requirements

12. The Childcare Sufficiency Assessment and Local Well-being Plans

12.1 Requirements

12.1.1 It is essential to take note of local labour market and patterns of training and adult learning locally, working patterns, shift work, opening, closure, expansion or shrinkage of sources of employment.

12.1.2 Additionally, consider planned and proposed property development within area which may affect population composition and density.

12.1.3 It is a requirement to draw on information included in existing Local Well-being Plans and any information captured by Public Service Boards in developing their future Assessment of Local Well-Being.

12.2 Data Capture / Methodology

12.2.1 This section is predominantly completed via desk research in identifying childcare-related contributions to key documents. Additionally, officers and partners were able to identify relevant working groups and policies that had an impact.

12.2.2 Swansea's Local Development Plan (LDP) provides details of key strategic developments up until 2025. This data has been used to advise childcare sufficiency targets for the previous 5 years, particularly giving consideration to developments with a high proportion of 3-4 bedroom properties due to the likelihood of being family dwellings.

12.2.3 Swansea's Wellbeing Assessment was undertaken towards the end of 2021, providing a useful opportunity to obtain up to date information.

12.3 Swansea's Wellbeing Plan & Childcare Sufficiency

12.3.1 Swansea's Wellbeing Plan gives consideration to the impact of childcare both as part of every child's healthy development and to support families to undertake training and employment. Early Years (giving children the best start in life) is Objective One within Wellbeing plan

https://www.swansea.gov.uk/localwellbeingplan

1 Children have the best start in life to be the best that they can be when…

Parents and families are well prepared for birth and early childhood

All children develop to their full potential

Support services are high quality and work together well

Children are safe from harm and are supported at the earliest opportunity

If children have the best start in life they are likely to be healthier, more likely to be better learners and less likely to experience poverty and deprivation as adults.

Positive Early Years experiences lead to a greater likelihood of having a good job and a better standard of living. They also more likely to be able to look after the environment and contribute to safe and prosperous communities (for more information, please see the Marmot Review).

Giving children the best start in life falls into the following three categories in Swansea:

- Promoting important messages and information to all.
- Enhancing and improving universal Early Years services. This is through the availability of additional early intervention provision for expectant parents and young children. It makes sure there are strong foundations in place for their future development.
- Adding value to universal and early intervention services. This is through the engagement and involvement of wider services and organisations. It's to promote, signpost, co-plan and deliver community-based support and activities.

Our Objective by 2040:

To make sure children in Swansea have the best start in life to be the best they can be.

The Steps we will take towards this will be:

The Steps to be taken	**Short term** (< 3 years)	**Medium term** (4-9 years)	**Long term** (10-25 years)
To promote Swansea's First 1000 Days Programme	To support and join the Public Health Wales First 1000 days collaborative. To develop an action plan to deliver the short-term actions.	To review and put in place medium term actions.	Savings are drawn from putting in place the short and medium-term steps and are invested in the remaining actions.
To make sure parents are supported for birth and during early childhood	To engage our PSB workforces. To make every contact count through promoting key messages and knowledge to families. To adopt social prescribing at all levels.	To build on involvement elements of developing and embracing the messages by working together.	Keep the momentum into the long term.
To more effectively integrate Early Years Services	To explore opportunities to integrate Early Years services. To learn from existing good practice in Swansea and beyond. To develop and test a Swansea model through pilots.	To evaluate and further embed a Swansea model. To enhance closer multi-agency collaboration and working together.	Fully implement the new Swansea Early Years model.
To make sure that interventions are made earlier in life (and in the right ways at later stages)	To explore and pilot cross agency opportunities. To deliver preventative services at an earlier stage to stop issues becoming worse.	To build on what works.	Keep the momentum and made sure that the Adverse Childhood Experience (ACEs) cycle is reduced across the population.

The Early Years Steering Group will be responsible for delivering the Steps. Specific leads will be identified as appropriate.

Additionally, the Wellbeing Plan acknowledges the Marmot Review and the recommendation to ensure high quality childcare is in place;

Marmot Review: an independent review into health inequalities in England published in 2010 (www.ucl.ac.uk/marmotreview). The Review, chaired by Professor Sir Michael Marmot, included a focus on Early Years interventions into health inequalities. The Marmot Report specifically suggested a need to:

- reduce inequalities in the early development of physical and emotional health and cognitive, linguistic and social skills
- ensure high quality maternity services, parenting programmes, childcare and Early Years education for all
- build resilience and well-being of all young children.

file:///C:/Users/stephen.cable/Downloads/Working_Together_to_Build_a_Better_Future%20(1).pdf

12.4 Childcare within Additional Local Policy

12.4.1 Tackling Poverty

12.4.1.1 The Childcare & Play Sufficiency Manager sits on Swansea's Tackling Poverty Forum. This gives particular regard to the impact of childcare in supporting families in, or at risk of, poverty in engaging in work and employment.

12.4.1.2 At the time of undertaking the 2022 CSA, The Poverty Forum had a specific target to consider the impact of costs of childcare on those in poverty.

12.4.2 Childcare & Educational Policy

12.4.2.1Childcare and education have operated hand in hand for many years and both can evidence a reliance on, or benefit of association with, the other. Despite this, some school-based settings and the development officers that support them have reported a dissonance particularly with regard to costs of hire via the third party lettings agreements.

12.4.2.2 The current Third Party Lettings/ Out of School Clubs Guidance (V3) produced in May 2021, includes specific Out of School Clubs information (section 5).

12.4.2.3 Aside from the Welsh in Education Strategic Plan (**WESP – Section 3**), and the links with Flying Start, there is minimal reference to the role of childcare in supporting education within local policy.

12.4.3 Childcare & Play

12.4.3.1 Given that childcare sufficiency and play sufficiency sit within the same structure it is perhaps unsurprising that the two areas work closely for mutual gain. Following the 2017 CSA identifying children's desire for increased outdoor play, a range of training and funding opportunities were developed to enhance opportunities within settings.

12.4.4 Childcare & Local Planning

12.4.4.1 There is a demonstrable link between local planning policy and childcare sufficiency. Most notably, additional housing developments, particularly with key strategic sites of often hundreds of homes, will affect demand for childcare.

12.4.4.2 As such, the Local Development Plan (LDP) and the proposal for strategic sites is factored into both ward RAG grading and in targets for umbrella organisation development officers where there is likely to be an increase in family homes within an area, i.e. an increased demand for childcare. The lead officer for the LDP sits on the Childcare Sufficiency Working Group.

12.5 A Collaborative Approach to Childcare

12.5.1 As detailed in Section 2, the partnership approach to childcare is something which has developed in recent years. Childcare contributes to, and is impacted by, a wide range of policy and it is important that decision-makers are aware of childcare-related implications.

12.5.2 The Childcare Sufficiency Working Group assists this, but it would be beneficial for an ongoing identification of relevant policy to ensure consideration is given and influence occurs.

12. CSA & Local Wellbeing Plans – Summary of Key Findings

• The role of childcare within Swansea's Wellbeing Plan is limited and would benefit from additional consideration
• Childcare and its contribution to employment and training for families in poverty has been a key discussion / action point within Poverty planning and this has been beneficial.
• Childcare demand is impacted by housing developments and the close working relationship needs to be maintained and projections need to be factored into future planning.
• There are inevitable close links between childcare and education, although there are occasions where settings report barriers that would benefit from further discussion.
• Officers leading on childcare sufficiency should look to stay abreast of relevant local policy and seek to contribute or advise on development.

12. CSA & Local Wellbeing Plans – Action Plan				
Challenge	Action	Responsible	Timescale	Outcome
12.1 Continue to evidence childcare's contribution to addressing poverty	12.1 Ensure continue recognition of childcare and its contribution within local poverty plans and policy	LA	Ongoing	Those living in poverty are better supported to use formal childcare
12.2 Ensure childcare is recognised within education planning	12.2 Increased dialogue with relevant education colleagues	LA	March 23	School-based settings feel their needs are understood and considered
12.3 Ensure key housing developments are considered when planning sufficiency	12.3 Engage LDP lead in working group and identify key strategic sites	LA	Ongoing	Where significant increased housing will take place, there is a plan for addressing increased demand for childcare
12.4 Ensure childcare contribution to Wellbeing Plan and other policy and strategy is recognised and monitored	12.4 Identify relevant policy and ensure links exist and contributions made	LA	Ongoing	Childcare is recognised and considered within relevant policy

13. Barriers to Childcare Provision

13.1 Requirements

13.1.1 It is a requirement to look at the accessibility of provision and consider how barriers can be removed.

13.1.2 In particular, consider barriers experienced by:
- *Working parents*
- *Parents seeking work or training opportunities*
- *Unemployed households*
- *Low income families*
- *Lone parent families*
- *Families from ethnic minority backgrounds*
- *Families with children who have special educational needs or a disability*

13.2 Methodology

13.2.1 In identifying barriers to childcare, key methods for identification are via the range of surveys developed as part of the assessment.

13.2.2 Additionally, data gathered by the Family Information Service was used to identify concerns raised with them on access to childcare.

13.2.3 Where a particular need or issue was identified, focus groups with representative parties were arranged, most notably in relation to financial barriers to childcare.

13.3 Accessibility of Childcare Provision

13.3.1 It is essential that all those requiring attendance at childcare settings are not prevented from doing so. Additionally, no family with additional access or support needs should have to incur expense or other inconvenience to allow attendance. There have been concerns documented in previous years that families have had to pay extra as their child required additional staffing.

13.3.2 This needs to be communicated effectively to settings so that they are aware that if it appears likely that an added cost is required, the local authority are made aware.

13.3.3 Accessibility also relates to a choice of language, particularly in terms of English and Welsh medium but in ensuring specific individual needs are met wherever possible.

13.4 Barriers to Childcare Provision

13.4.1 Findings from the Welsh Government Parental Survey make a telling statement that over 50% of those surveyed either agree or strongly agree that childcare is a barrier to accessing training or employment. This figure could be higher given that 25% listed 'N/A', however, it is fair to assume some of these will have listed N/A due to not being a barrier. Either way, it is a stark statement.

	26.11. Childcare is a barrier to me accessing employment or training		Response Percent	Response Total
1	Strongly Agree		31.5%	58
2	Tend to Agree		21.2%	39
3	Tend to Disagree		12.5%	23
4	Strongly Disagree		9.2%	17
5	N/A		25.5%	47
			answered	184

Source: 2021 Parent/Carer Survey

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*When asked the question; **I know where to find out information on financial assistance for childcare',** the responses were;*

11.8% Strongly Agreed
25.1% Tended to agree
32.1% Tended to disagree
26.7% strongly disagreed
4.3% felt the question wasn't applicable to them

In other words, over 60% of those who responded felt they didn't know where to find out about financial assistance for childcare.

13.4.2 Whilst in work, over 76% of respondents stated that childcare issues had caused problems at work, with 30% feeling it prevented continuation of work.

In the last year, have issues surrounding childcare affected you or your partner (if applicable) in any of the following ways (tick all that apply):								
							Response Percent	Response Total
1	Caused problems at work						76.22%	109
2	Prevented Continuation of work						30.07%	43
3	Stopped you working/getting a job						30.07%	43
4	Stopped you from training						27.27%	39
5	Other (please explain):						9.09%	13
Statistics	Minimum	1	Mean	2.21	Std. Deviation	1.3	answered	143
	Maximum	5	Variance	1.68	Std. Error	0.08	skipped	44

13.4.2.1 Additionally, anecdotal responses to this question help to detail how specifically families have been impacted;

prevented me applying for a more senior role
Reduced to part time due to cost.
I am a childminder
Caused me to be furloughed.
Forced me to work part time only
Caused me to work part time instead of full time
Juggling g homeschool and both parents working full time
Need to leave early due to collecting I'll child as private nursery concerned due to covid
Gweithio adref yn heriol gyda'r plant adref hefyd
For 18 months we could not find any childcare for our children. This caused massive anxiety and stress levels in both myself and my husband
It has created a lot of difficulties with work, children balance. To care for my child during the working day means I have to work in the evenings when she is in bed.
When returning to work from maternity leave I didn't not have the financial ability to access the amount of childcare I actually needed, this was due to being on lower pay through my period of maternity in comparison to my usual wage. I have therefore found myself juggling working from home and having a baby in my care two afternoons a week as this is the only option available to me. Whilst work have not raised an issue with this, it does of course impact on my work in general.
Added pressure and stress placed on parents

13.4 Barriers faced by Identified Groups

13.4.1 Working parents

13.4.1.1 The CSA is predominantly based around the needs of working parents. Whilst their needs and barriers will be diverse, it is apparent that the primary barriers faced by working parents are cost of provision and ensuring that provision caters for their specific work patterns or requirements.

13.4.1.2 Additionally, working patterns, notably unsociable hours, impacts on ability to access formal childcare and this is addressed in Section 5.

13.4.2 Parents seeking work or training opportunities

13.4.2.1 Evidently, those seeking work will be likely to facing more difficulty in relation to cost of childcare. This is explored in more detail within this section.

13.4.2.2 Additionally, with training opportunities taking place for part of a day, it is noted that most formal childcare settings require either a full or half day payment to attend, so for a shorter training session, a full charge may still be required.

13.4.2.3 The Programme for Government 2021-26 Wellbeing Statement has resulted in eligibility changes for the Childcare Offer to support parents in training. [Programme for government 2021 to 2026: Well-being statement | GOV.WALES]

13.4.3 Unemployed households

13.4.4 Low income families

13.4.4.1 Barriers experienced by low income families are likely to be the same as those identified by most families, i.e. cost being a barrier, but at a more pronounced level. Feedback from families has already identified that, for many, costs of weekly childcare can all but cancel out weekly income.

13.4.4.2 One benefit will be the potential for universal credit towards cost implications of childcare. It will be beneficial to look at means tested support towards childcare costs.

13.4.5 Lone parent families

13.4.5.1 Several responses to surveys were able to be identified as from lone parent families. It can be assumed that they will be less likely to have immediately available informal childcare, i.e. from the other parent, while they work.

13.4.5.2 Another consideration, albeit one which has not been identified from consultation is where lone parent families share responsibility for their children and therefore require childcare for, say, 50% of the time. This may be problematic for settings where a child is looking to attend on alternating weeks.

13.4.6 Families from ethnic minority backgrounds

13.4.6.1 The fact that 22% of settings stated they could not provide a service in any language other than English or Welsh suggests those for whom English is a second language may face barriers.

13.4.6.2 It is notable that the percentage of respondents from ethnic minorities was disproportionately low.

13.4.7 Families with children who have special educational needs or a disability

13.4.7.1 It is essential that those with additional needs or are disabled are able to access childcare.

13.4.7.2 It is also essential that families with a child with a specific need are not required to pay a higher fee than other families to receive the same care. Specifically, if attendance at childcare requires either additional staffing support or specialist equipment, this cost must not be incurred by the parent/carer.

13.4.7.3 There have been cases within Swansea where an additional staffing charge has been passed on to the parent/carer and this needs to be addressed. This does not mean that a setting should have to be 'out of pocket' and this is where the Additional Learning Needs (ALN) Act places requirements on local authorities.

13.4.8 As identified within the surveys, there is still a perception among parent/carers that settings will not be able to provide for their child's needs.

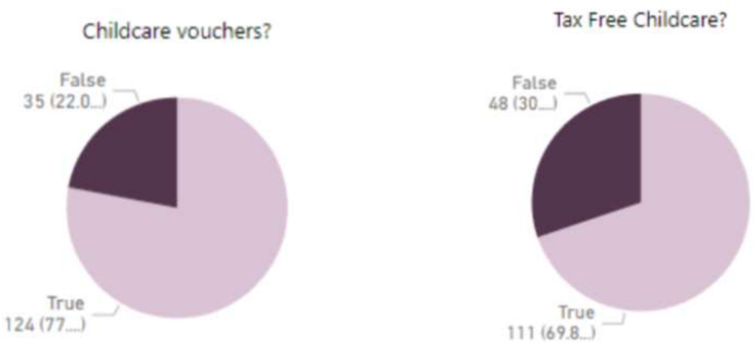
13.4.9 Additionally, as noted in Section 17 (Training & WFD), in March 2021, the sector reported overall that they felt that they had insufficient knowledge, training and guidance to meet the needs of children with ALN.

13.4.10 As a result, a focus group was developed in February 2022, incorporating representatives of Swansea Parent/Carer Forum and the local authority's Early Years ALN Team. This group identified the following key issues;

- Ensuring families are aware of support available at the earliest opportunity
- The need to ensure those from ethnic minorities or otherwise can access support

13.5 Tax Credits & Support Towards Childcare Costs

13.5.1 Families are able to access support towards the costs of childcare as a result of a range of initiatives including tax-free childcare. Information from Dewis (March 2021) suggests that the majority of settings offer childcare vouchers or are registered for tax-free childcare, although there are notably 30% that do not. *Equally, this figure does not translate exactly with the amounts in 13.5.4.*



13.5.2 It is noted that, despite a considerable increase in take-up over the past 5 years, Swansea remains behind most comparable areas in terms of the number of families taking this up. Using 2020 mid-year estimates as a guide, it can be demonstrated that the 715 take-up in a population of 246,563, is much less favourable than Cardiff's 1,875 in a population of 369,202.

Table 9: Annual Number of Families with Used Tax-Free Childcare accounts by local authority For Tax Years 2017-18, 2018-19, 2019-20 and 2020-21 by Country and Region

Area Name	2017-18	2018-19	2019-20	2020-21	2020 Population*
Bridgend	55	195	475	615	147,539
Caerphilly	75	225	545	650	181,731
Cardiff	180	670	1,460	1,875	369,202
Carmarthenshire	85	270	595	730	190,073
Ceredigion	*	50	135	210	72,895
Conwy	60	175	360	455	118,184
Denbighshire	40	150	295	395	96,664
Flintshire	60	255	635	815	156,847
Gwynedd	30	130	315	400	125,171
Isle of Anglesey	*	100	230	255	70,440
Merthyr Tydfil	*	65	150	185	60,424
Monmouthshire	50	160	325	415	95164
Neath Port Talbot	40	170	405	485	144,386
Newport	55	270	615	745	156,447
Pembrokeshire	30	85	210	275	126,751
Powys	80	205	405	500	133,030
Rhondda Cynon Taf	55	235	655	810	241,873
Swansea	75	250	590	715	246,563
Torfaen	*	95	275	345	94832
Vale of Glamorgan	65	245	555	695	135295
Wrexham	45	180	455	535	136,055

* *2020 Mid-year estimates* [Population estimates by local authority and year (gov.wales)]

13.5.3 This information is further broken down to identify take-up per parliamentary constituency and shows that, despite, being the smallest area by overall population – and notably by ages 0-4 – Gower has the highest take-up of tax-free childcare.

13.5.4 Whilst rates of employment will be lower in Swansea East, it is still expected that take-up would be higher, particularly as average income is lower. This needs to be addressed specifically. One option may be to ensure advisory groups such as Local Area Coordinators are aware of this and can pass on information.

Tax Free Childcare Statistics: December 2021

Table 11: Annual Number of Families with Used Tax-Free Childcare accounts by Westminster parliamentary constituency For Tax Years 2017-18, 2018-19, 2019-20 and 2020-21 by Country and Region					
Area Name	2017-18	2018-19	2019-20	2020-21	2020 Population*
Swansea East	*	75	165	205	84,344
Swansea West	30	70	180	210	82,586
Gower	*	105	245	300	79,633
	30	250	590	715	

* Parliamentary constituency population estimates (Experimental Statistics) - Office for National Statistics

13.5.5 In January 2022, Welsh Government put Swansea Council in touch with Hempsall's, an organisation commissioned to support take-up of Tax-Free Childcare (see 13.7). This was in recognition of the comparatively low take-up of TFC.

13.6 Addressing Barriers to Childcare

13.6.1 Swansea offers an **Assisted Places** scheme to support those identified as benefitting from accessing childcare, but for whom financial or other barriers exist. The scheme has been in existence for several years and may be a consideration for development in response to concerns over costs of childcare.

13.6.2 A scheme to support children with disabilities and additional needs to access childcare has been in operation for a number of years now. Prior to 2018, it was administered by Swansea Council for Voluntary Services (SCVS), before coming back under local authority lead. At this time it changed its name from the '1 to 1 scheme' to '**Supported Access to Childcare'** in recognition of the fact that assistance might come in many forms, e.g. resources, as well as additional staff hours.

13.6.3 With the introduction of the ALN Bill in September 2021, administration of the Supported Access to Childcare scheme was amalgamated with similar support programmes, such as for Flying Start and the 30 Hour Childcare Offer.

13.7 Due to the low take-up of Tax-free Childcare, Swansea Council entered into discussion with Welsh Government and a commissioned agency, Hempsalls, with a view to increasing this take-up.

13.7.1 It was agreed to develop an action plan aimed at increasing;
- Awareness amongst families
- Settings' ability to communicate benefits to families
- Settings registered for the scheme
- Overall take-up

13.7.2 A significant factor is at as of 3rd March 2022, 132 of 236 Swansea settings identified were unregistered on the tax-free childcare scheme. This is something that needs to be addressed if the number of parents taking up tax-free childcare is to increase.

13. Barriers To Childcare Provision – Summary of Key Findings

- As documented across the assessment, the primary barrier to childcare remains a financial one, with many detailing how costs have either prevented or impacted upon employment.
- Over 60% of respondents stated they didn't know how to find out about financial assistance for childcare. Take-up of Tax-Free Childcare in Swansea is comparatively low and increasing this should be a priority in forthcoming years. Notably, the take-up in East Swansea appears disproportionately low.
- This is reflected in the fact that only 132 of 236 settings are registered to support the tax-free childcare scheme.
- Feedback from parents/carers of those who are disabled or have an additional learning need are continuing to question whether provision can meet their child's needs. However, there is potential that some of this may be perception, but either way it will need to be addressed to build confidence. The work of Swansea's Early Years ALN Team to coordinate the process for support will continue to be beneficial.
- As detailed previously, there are examples of where those looking to access Welsh Medium childcare have experienced barriers in terms of accessibility

13. Barriers to Childcare Provision – Action Plan

Challenge	Action	Responsible	Timescale	Outcome
13.1 Cost of childcare is the primary concern for families	13.1 Encourage settings to offer sibling discounts and other reduced costs	LA & Partners	March 23	Families of multiple children finding formal childcare more affordable
	13.1 Disseminate Choosing Childcare booklet which includes a section on help with the cost of childcare.		March 23	Increased understanding of support with childcare costs
13.2 Low take-up of Tax-Free Childcare	13.2 Undertake an awareness campaign to increase take-up	LA & Partners	March 23	Increased awareness from families
	13.2 Look to address the apparently lower take-up in Swansea East		March 24	Increased take-up in Swansea East
	13.2 Increase settings' awareness and ability to advise families of benefits		March 23	Settings reporting increased ability to advise parents
	13.2 Increase the number of settings registered to support the scheme		March 25	Increase in number registered

13.3 Settings' response (March 2021) that they do not feel they have the knowledge and support to effectively care for children with ALN	13.3 Continue roll-out of ALN support and training 13.3 Undertake additional research to identify if view has changed	LA LA	Ongoing March 23	Increase in numbers having attended training Increase in settings feeling confident in meeting needs
13.4 The need to ensure families are aware of support at the earliest opportunity	13.4 Identify an effective process for informing families of support to access childcare	LA & Partners	March 23	Families with children with ALN / Disabled are supported earlier
13.5 View of some families that welsh medium provision is not available to them	13.5 Undertake specific work to gauge levels of Welsh medium provision and map against demand	LA	March 24	Identification of gaps or barriers to welsh medium provision

14. Free Nursery Education, Flying Start and Childcare Offer provision

14.1 Requirements

14.1.1 It is a requirement to consider the childcare places filled, needed and available in respect of the above and should provide a summary of the situation in your areas in respect of these Welsh Government programmes.

14.2 Data Capture / Methodology

14.2.1 Data required for this section was predominantly obtained via the lead officer responsible and support staff.

14.2.2 Additionally, consultation responses that made reference to elements of this section are included.

14.3 Early Years Education

14.3.1 This information was obtained via the authorities' education Information Officer. They noted that the current system does not record if pupils attend in the morning or afternoon as only schools themselves record this data.

Number of schools (77 total):-

Language	SA1	SA2	SA3	SA4	SA5	SA6	SA7
	South East Swansea	South Central Swansea	South West Swansea	North West Swansea	North Central Swansea	North Swansea	North East Swansea
Welsh	1	1	1	2	2	2	1
Welsh & English	0	0	0	0	0	0	0
English	14	7	10	12	10	10	4
Other	0	0	0	0	0	0	0

Nursery pupil numbers at April 2021 (PLASC school census):-

Medium Type	NCYearActual	SA1	SA2	SA3	SA4	SA5	SA6	SA7
English medium	N1	249	127	93	181	199	156	71
English medium	N2	420	235	175	319	366	289	99
Welsh medium	N1	8	18	27	40	35	30	41

Welsh medium	N2	19	32	34	87	71	49	50

N1 are the 3 year olds and N2 are the 4 year olds.

14.3.2 As of February 2022, numbers on roll in nursery at the end of the previous two terms were:-

Term	Number of Children / Places
Summer 2021	3827
Autumn 2021	2689

Autumn figures will always be a lot lower than the later terms as the N1 pupils start during the year when they become 3. It is believed, there may also be an effect caused by the huge fall in the birth rate.

14.3.3 The WG parental survey asked parents to identify if their child was accessing an early education place with the vast majority of respondents stating that they were.

Is your child(ren) age 3 or 4 accessing funded early education place at school or nursery?

		Response Percent	Response Total
1	Yes, In same local authority as I live	78.57%	44
2	Yes in a different local authority to where I live	0.00%	0
3	Will start soon	3.57%	2
4	No	14.29%	8
5	Not sure	0.00%	0
6	Not applicable	5.36%	3
		answered	56
		skipped	131

Additional comments in relation to this question were;

- *Provision is only available until 4 1/4 not for the whole duration of being 4*
- *Qualifies in Jan (term after 3rd birthday)*
- *Not eligible until the term after he turns three which is in 4 months*
- *The hours didn't suit our working hours and they were settled in a day nursery with funding contributed by the childcare offer.*

14.3.4 As detailed in Section 5, the SASS asks settings to identify if they provide early education. Considering all early education is provided by the maintained sector, it is noteworthy that settings report that they offer it.

Type(s) of care - Early Education Placement										
Do you deliver this type of care?	Total no. of children who attended this part of the service during week 1 (June 7th to 13th 2021)	Total no. of children who attended this part of the service during week 2 (June 14th to 20th 2021)	Total no. of children who attended this part of the service during week 3 (June 21st to 27th 2021)	Total no. of children who attended this part of the service during week 4 (June 28th to July 4th 2021)	Average no. of children who attended this part of the service, per week	Do you currently have a waiting list for this part of the service for an immediate place?	How many children are on the waiting list for an immediate place?	How many unfilled spaces do you have for this part of the service?	Child-minders Yes	Day Care Yes
43/153	1363	1413	1334	1456	1404	6 Yes 41 No	16	709	14	29

14.3 Key Findings – Flying Start

14.3.1 The data contained within the 2022/23 Flying Start Delivery Plan details the level of Flying Start provision within Swansea.

Name	Language					Provider			Number of FS places		Confirm CIW Registered
	a	b	c	d	e	LA	Voluntary	Private	English	Welsh	
Birchgrove		✓				LA			**12**		✓
Blaenymaes		✓				LA			**52**		✓
Clwyd		✓				LA			**72**		✓
Hafod		✓				LA			**24**		✓
Pentrechwyth		✓				LA			**32**		✓
Portmead		✓				LA			**44**		✓
Sea View		✓				LA			**56**		✓
Stepping Stones		✓					Mixed funding		**n/a needs based**		✓
St Helen's		✓				LA			**36**		✓
St Thomas		✓				LA			**40**		✓
Townhill		✓				LA			**48**		✓
Waun Wen		✓				LA			**32**		✓
Gors						LA			**40**		✓
Clase		✓				LA			**24**		✓
Craigfelen		✓				LA			**20**		✓
Dechrau Disglair					✓	LA				**28**	✓
Parkland		✓				LA			**12**		✓
Plasmarl		✓				LA			**24**		✓
Pontarddulais		✓				LA			**20**		✓

Source: Flying Start Delivery Plan 22/23 – Draft

a) English Medium, b) Predominantly English, c) Bilingual, d) Welsh and English, e) Welsh Medium

14.3.2 In summary, the 19 Flying Start settings offer 624 places, excluding Stepping Stones which provides specific care for children with an identified need. All but 2 Flying Start provisions offer 2 sessions thus increasing the overall number of childcare places.

14.3.3 It is worth noting that only one of the 19 settings is identified as delivering through Welsh Medium with the remaining 18 'predominantly English'.

14.3.3.1 It has been noted by Mudiad Meithrin in particular, that there is potential that this may have an impact on the ongoing use of the Welsh language, using the example; A family wishing to access their entitlement to Flying Start through Welsh medium will need to travel to Dechrau Disglair. This may not be convenient/possible and, therefore, there is a high chance that the family will elect to attend English medium Flying Start provision, which, in turn, may lead to attending English medium education. There is currently minimal consultation data to corroborate this suggestion, but it will need to be noted.

14.3.3.2 To support this, it was commented by a partner that '*as investment in provision has increased number of childcare places available, anecdotal evidence and waiting list suggests that parents are prepared to wait for place and to date waiting lists have not meant that parents have to wait longer than a couple of weeks for a place to become available. Although with the new YGG Tirdeunaw this might change and therefore we must carefully monitoring the situation.*'

14.4 Families' use of Flying Start

14.4.1 The WG Parental Survey asked whether 2 and 3 year olds were accessing Flying Start with only 4 of 94 respondents stating they did. Notably, 22 answered not applicable which could either mean they aren't the required age, or it relates to eligibility.

Is your age 2 or 3 year old child(ren) accessing Flying Start childcare?

		Response Percent	Response Total
1	Yes	4.26%	4
2	No	82.98%	78
3	Not sure	5.32%	5
4	Not Applicable	23.40%	22

Statistics								
Minimum	1	Mean	2.41	Std. Deviation	0.85	answered	94
Maximum	4	Variance	0.72	Std. Error	0.08	skipped	93

14.4.2 When asked why families do not access Flying Start, understandably most answers referred to not being in the catchment area, but other responses included;

- *Not in catchment area. Even though it is actually on the very same street I live!*
- *Times are not suitable when working full time, easier to send him to nursery full time*
- *No idea if this is available in my area.*
- *Because it doesn't enable me to work. I would rather it be 2 full days than 5 part days. It would be very unsettling for a 2 year old to be in two different childcare settings each day and many childminders/nurseries won't do flying start drop offs.*
- *Doesn't apply to us due to our income therefore we cannot access this scheme.*
- *No flying start at my end of street*
- *I don't live in a Flying Start Provision despite my child's additional needs, this is not available to him. Yet I have friends with higher earnings and a child with no additional needs that access it five days a week*
- *No Welsh medium available**
- *I emailed to ask for further information to see if I'm eligible no reply.*
- *I've tried to Google and don't think I'm eligible*

14.4 Proposed Expansion of Flying Start

14.4.1 During the period in which the 2022 CSA was undertaken, there were significant developments in terms of the proposed expansion of Flying Start as detailed within Welsh Government's Programme for Government;

https://gov.wales/programme-for-government-2021-to-2026-html

Flying Start expanded in Wales | GOV.WALES

14.4.2 Under the headline of "**Protect, re-build and develop our services for vulnerable people"** Welsh Government sets out the ambition to:

- Fund childcare for more families where parents are in education and training or on the edge of work.
- Deliver a phased expansion of early years provision to include all 2 year olds, with a particular emphasis on strengthening Welsh medium provision.
- Continue to support our flagship Flying Start programmes.
- Prevent families breaking up by funding advocacy services for parents whose children are at risk of coming into care.
- Provide additional specialist support for children with complex needs who may be on the edge of care

14.4.3 Welsh Government have themselves stated that this is an ambitious initiative, but one which all Welsh Councils are committed to achieve, with Swansea Council being no exception.
At the time of completing the CSA, the Council's Partnerships and Commissioning Hub was currently working with Welsh Government to glean further information and work collaboratively in terms of shaping any future developments, which will gradually evolve over the next three years.

14.4.4.1 The **Expansion of Early Years Provision: Guidance for Phase One**[6] refers to addressing the following high level priorities:

- **addressing deprivation**
- **increasing Welsh language provision**
- **addressing gaps in availability of provision**

14.4.5 In relation to outreach provision, the guidance states; *'You are expected to deliver 75% of your expansion via the geographical targeting methodology outlined above. As part of your plans for phase one up to 25% of your expansion can be achieved via Flying Start Outreach in order to give you the flexibility to reach families living outside of existing or new Flying Start areas and in order to reach disadvantaged families living in more rural areas.'*

14.4.5 Locally, the development of Flying Start outreach during 2021/22 has brought successes in terms of engaging a wider population and this is something that should be factored in to discussions on development of this element of the expansion.

6

14.5 Key Findings – 30 Hour Childcare Offer

14.5.1 The Welsh Government Parental Survey asked parent/carers to identify whether they were accessing the Childcare Offer, with a suggestion that 36 of the 56 (64%) eligible families were.

Is your age 3 or 4 year old child(ren) accessing government funded childcare (the Childcare Offer)?

			Response Percent	Response Total
1	Yes, In same local authority as I live		62.50%	35
2	Yes in a different local authority to where I live		1.79%	1
3	No – but may access soon / in the future		12.50%	7
4	No - with no plans to do so		7.14%	4
5	Not sure		3.57%	2
6	Not applicable		17.86%	10

Statistics								
	Minimum	1	Mean	2.44	Std. Deviation	1.95	answered	56
	Maximum	6	Variance	3.81	Std. Error	0.25	skipped	131

14.5.2 Of those not accessing it, the following additional comments were made;

- *Provision is only available until 4 1/4 not for the whole duration of being 4 she is 4 soon to be 5 so not eligible as in full time school*
- *Cannot afford it. Seems pointless to send them for only 15 hours a week. There's no local nurseries to me who offer pick up/drop offs to school nursery so I'd have to leave work to go and pick them up to then take them to creche. Seems a pointless waste of time.*
- *Because there's no point as we can't find childcare for my oldest*
- *Used childcare setting before started school. Now grandmother has retired and is able to look after him. This is not to say that I won't use the same childcare setting in the future if grandmother is unable to look after.*
- *I haven't heard of this*
- *I do not have a job so can't*

14.5.3 When asked if they wish to access the Childcare Offer once eligible, only 6% of the respondents were unsure with the rest stating yes. This figure is much higher than the percentage currently accessing although the figure in 14.5.1 includes several with plans to access.

Do you wish to access government funded childcare (the Childcare Offer) when your child becomes eligible at age 3?			Response Percent	Response Total
1	Yes		93.65%	59
2	No		0.00%	0
3	Not sure		6.35%	4
4	Not applicable		0.00%	0
			answered	63
			skipped	124

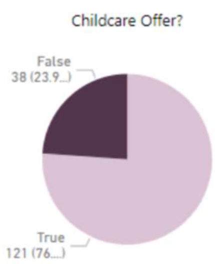
14.5.3.1 Of those who are 'unsure' only one commented, stating *'It might make me worse off than 85% free from Universal Credit.'*

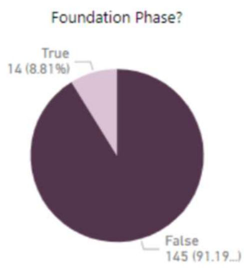
14.5.4 Take-up of Offer

14.5.4.1 Data from the Childcare Offer team identifies that close to 500,000 hours were booked in 2021. Notably, these figures were impacted by regulations surrounding Covid-19.

	Booked hours	attended hours	children accessing	applications received	welsh medium
Jan-21	32,617	30,135	579	67	4
Feb-21	39,989	37,085	706	71	26
Mar-21	51845	48,877	730	89	15
Apr-21	47,045	44,487	936	47	36
May-21	57,870	54,091.50	833	45	40
Jun-21	51947.5	47,736.50	893	55	40
Jul-21	54,769	50,512.50	886	114	28
Aug-21	16,501	14,144.50	366	82	0
Sep-21	33,066	30,752.50	600	84	27
Oct-21	34,881	32,165.50	609	47	19
Nov-21	33,122	30,072.50	534	85	28
Dec-21	43,100	36,568	633	63	29
totals	496,753	456,628		849	

14.5.4.2 Dewis data asked settings to identify whether they are signed up to the Child Offer which highlights over 75% of registered settings are engaged.





14.5.4.3 Feedback from settings has consistently shown that the 30 Hour Offer has a positive impact on settings in terms of increased numbers.

During an Early Years setting visit as part of the 2022 assessment, the nursery leader mentioned the following; *'The 30 hour childcare offer is used by 7 out of the 8 children that are here today, the 30 hour childcare offer is what keeps us going'.*

14. Free Nursery Education, Flying Start and Childcare Offer provision – Summary of Key Findings

• Overall, the 30 Hour Childcare Offer appears to be well received and has been mutually beneficial to families and service providers.
• The proposal to extend funded childcare will have a major impact and consideration needs to be given to this.
• Flying Start's 'Welsh offer' currently has potential to impact upon choice and ongoing decisions and will require consideration, particularly in light of proposals within the WESP.
• Flying Start's Outreach programme has enjoyed successes and should continue to be developed

14. Free Nursery Education, Flying Start and Childcare Offer provision – Action Plan

Challenge	Action	Responsible	Timescale	Outcome
14.1 The proposal to extend funded childcare to 2 year olds	14.1 Plan for the impact of the extension including resources	LA	March 23	Successful role-out of expansion with associated benefits
14.2 Consider Flying Start's Welsh Offer	14.2 Develop a plan for meeting need	LA & Partners	March 23	Requirements for Welsh provision met
14.3 Need to support those in need outside of Flying Start catchment	Further develop and extend Flying Start Outreach	LA	March 23	Effective outreach programme in place meeting needs of priority families

15. Workforce Development and Training

15.1 Requirements

15.1.1 There is a requirement to provide Information relating to workforce qualifications and training needs which should refer to all childcare types.

15.1.2 Additionally, this section would appear the best location to capture the views and needs of the sector.

15.1.3 Furthermore, this section will consider quality practice.

15.2Data Capture / Methodology

15.2.1 There were several areas for which information relating to qualifications and training needs were obtained, notably;

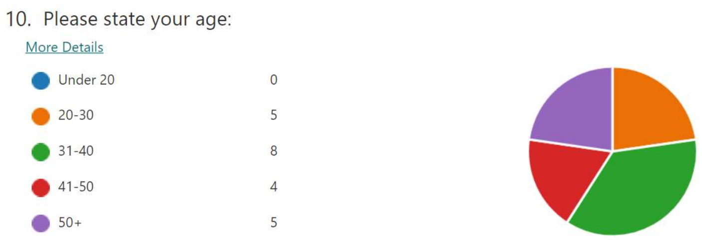
- SASS information from registered provision
- Flying Start qualifications data

15.2.2 An additional Workforce Survey was developed internally and live from November to December 2021. It included separate surveys for managers and staff and was intended to supplement findings from SASS and Dewis.

15.2.3 As part of the 2020/21 CSA Progress Report, a sector survey was developed between February and March 2021 and it was felt that the findings for this were within the timescales for consideration.

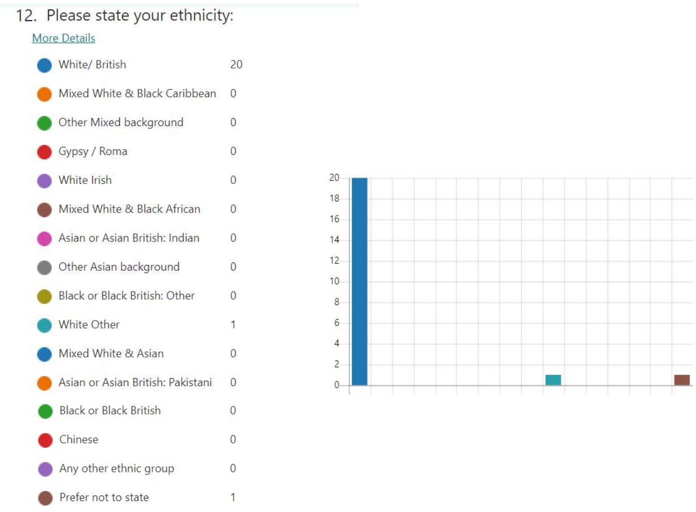
15.3 Key Findings

15.3.1 Firstly, it is important to get a sense of the make-up of Swansea's childcare sector. The attached sample from Swansea's own survey shows a fairly equal spread across the age ranges for staff.

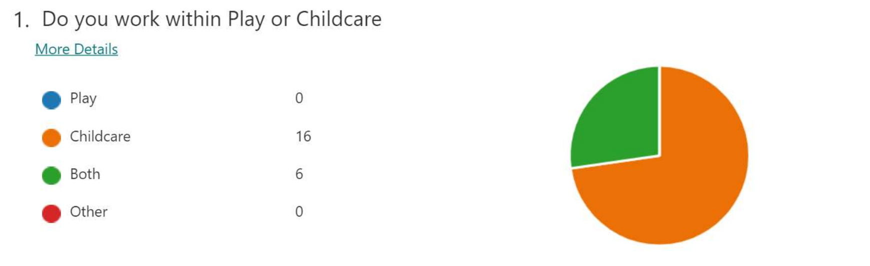


15.3.2 Notably – if not surprisingly, this survey featured a 100% female response rate. It has long been recognised that childcare is predominantly a career for females, but particularly in light of potential staff retention / recruitment issues, there is a potential opportunity to consider promoting the sector to males.

15.3.3 The survey also produced a telling response in relation to ethnicity, with only one 'white other' and one 'prefer not to state' being exceptions to white British.



15.3.4 As Swansea's survey was sent to all local childcare and play providers, due to undertaking both assessments concurrently, it is noteworthy that no respondents felt they delivered play without also childcare. This finding may be more appropriately noted within the Play Sufficiency Assessment, although with an identified reduction in playworkers identified there, it may hint towards a need for childcare workers to enhance their play knowledge.



15.3.5 The survey asked respondents to state what their highest relevant qualification is to date, with a mind map showing most commonly used words or terminology.

15.3.6 The SASS asked settings to identify the qualifications held by their staff. Notably, several childminders reported a 'nil return', although this is likely to be for their support staff as opposed to themselves. .

Type	No	Children's, Care, Learning and Development qualification at level 2	Children's, Care, Learning and Development qualification at level 3	Children's, Care, Learning and Development qualification at level 5	Qualification relevant to childcare but not listed	No formal Childcare Practitioner qualifications	Total number of staff who are Childcare Practitioners
Total	153	66	509	162	112	95	944
Childminders	62	5	11	3	13	6	38
Day Care	91	61	498	159	99	89	906

15.4 Sector Views & Concerns

15.4.1 The 20/21 CSA Progress Report detailed findings of the 20/21 sector survey with a significant finding that a great many within the sector felt undervalued and unappreciated. Childcare settings have played a vital role during the Covid-19 pandemic, not least to allow keyworkers to undertake their own role, but it is felt by the sector that this was unrecognised.

15.4.1.2 From visiting different Early Years settings, we spoke to many managers mentioning the struggles they are facing with recruiting. One manager said: 'It seems to be getting more difficult to find staff, many people seem to be leaving the sector'. During the undertaking of the 2022 CSA, it was frequently the case that childcare posts remained unfilled for long periods of time, with associated negative impact on settings.

15.4.13It is noted, anecdotally, and through feedback from development officers and other professionals, that there is a frequent occurrence of staff employed within childcare settings choosing to leave the sector.

One individual who left the sector over the past year noted;
'As much as I love the work, why would I continue to earn £7,000 less per year, and have the additional responsibility of ensuring children's health & safety and wellbeing, rather than working (somewhere else)?'.

15.4.2 Swansea's childcare sector appears to be at a critical point of a 'perfect storm' of perceived low pay, lack of recognition, added stress and responsibility arising from the pandemic and recruitment and retention issues. This needs to be a priority between now and 2025.

15.4.3 It is worth noting that the local authority is currently developing a Childcare & Play Workforce Strategy in collaboration with the 2022 CSA with an interdependency in terms of findings and proposed actions.

15.5 Training

15.4.1 Access to a range of training and continuous professional development (CPD) is a requirement within the Childcare Act which states;

> ***Workforce Development & Training*** *– An assessment should be undertaken of the existing childcare workforce qualifications and training needs across the childcare types, as a means of informing the local authority's workforce development and training programme. Consideration should be given to the training requirements in respect of the National Minimum Standards for Regulated Childcare (NMS)*

15.4.2 In Swansea, this is most relevantly achieved via the Early Years Training which is provided by the local authority. In the year from April 2021 to March 2022, 170 courses were put on for a total of 1,736 attendees. Note that this second figure is likely to have been impacted by Covid-19.

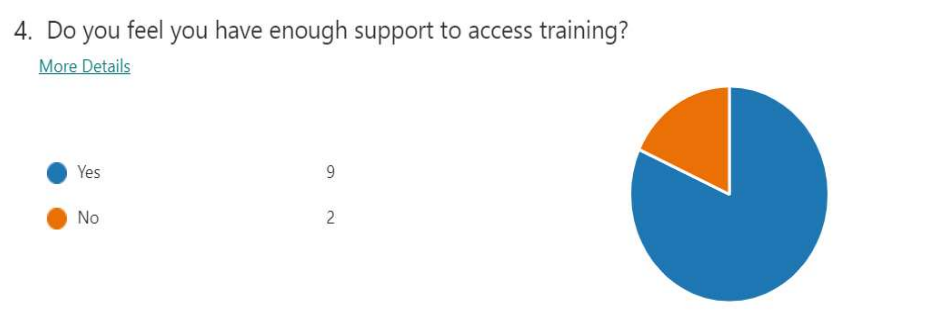
Title	Instances	Capacity	Bookings
An introduction to the new Additional Learning Needs system in Wales .	4	200	91
Balanceability course	5	70	67
Calming the Busy Mind	2	30	24
Cerebral Palsy support in the Early Years	1	40	19
Courageous conversations and working with professionals	3	150	60
Covid Babies /	1	25	20
Developing Inclusive Environments in the Early Years	4	200	49
Developing resilient children – supporting children's mental health and wellbeing /	2	50	8
Early Years coordination, play and development/	2	80	33
Elklan Speech and Language Support for 0-3s/	1	12	11
Elklan Speech and Language Support for 3-5s/	1	12	12
Food and Mood /	2	30	21
I Matter Too	2	30	6
It Starts with the Egg	2	30	24
It's not all reward, charts and stickers	3	45	29
Let's Talk Maths	3	24	16
Movers and Creators	4	240	29
Paediatric First Aid	14	168	148
Paediatric First Aid (ONLINE) -	6	54	48
Pathfinder Wellcomm support for Childminders	8	120	22
Pathfinder Wellcomm support for Day Nurseries/Early Years workers	9	148	73
Pathfinder Wellcomm support for Day Nurseries/Early Years workers	12	183	95
Person-Centred Practice and the One Page Profile	5	220	54
Positive attachment	1	25	7
Positive Looking: Development of early visual skills	3	100	12
Right here right now	2	31	23
Safeguarding Level 2	10	202	120
Safeguarding Level 3	4	81	47

Schemas in the Early Years /	2	80	39
Self esteem and confidence -	5	75	36
Sensory Processing and De-Escalation in the Early Years	3	115	64
Storytelling, Songs, Rhymes and Wordplay	2	21	16
Supporting a multi-sensory approach to literacy	6	300	20
Supporting Children Experiencing Developmental Delay in the Early Years	2	60	17
Supporting Children through adversity (ACEs)	1	25	17
The Communication Trust / ICAN short course: An introduction to speech, language and communication including QandA	5	60	20
The early stages of handwriting development, theory and strategies/	3	120	23
The Early Years ALN pathway	5	250	73
The Early Years ALN pathway and holding courageous conversations	2	60	23
The Great Outdoors	3	45	14
Understanding anxiety	4	60	41
Understanding Attachment	2	31	27
Understanding attachment and It starts with the egg	1	15	5
Understanding the angry/anxious child -	2	34	33
Understanding the angry/anxious child and Right here right now	2	30	8
Using Visual Supports for Inclusive Environments	4	200	92
Total	**170**	**4181**	**1736**

Additional data for the period between March and December 2021 shows;

- Total number of training courses (sum of all course instances) - 112 course instances
- Total number of spaces offered (sum of all the places available on each of their course instances) - 2,594 spaces available for those courses.
- Total number of attendees (sum of all bookings on each course instance) - 1,140 of those spaces were filled with bookings.

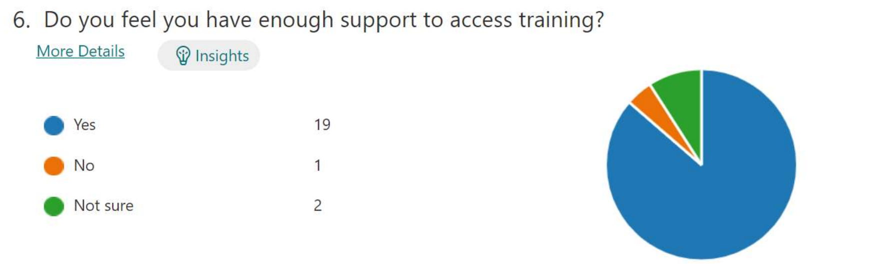
15.4.3 In terms of access to training, the majority of managers felt they received enough support;



Source: Swansea Council Childcare & Play Manager's Survey

11 Responses

15.4.2.1This finding is largely replicated by their staff, with the main difference being just under 10% were unsure if they have enough support.



15.4.3 When asked how Swansea could support managers with workforce development, responses included;

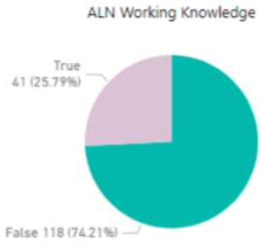
'Funded courses for child minders and more evening courses'
'Funding to release staff to undertake play qualification in school time'
'Can never have enough training'
'Allowing more than staff to attend from our nursery for safeguarding/first aid and for them to be held weekends when nursery is shut.'

15.4.3.1 The subject of releasing staff to attend training or gain qualfications appears a constant theme within sector engagement. This is an inevitable dilemma for settings who need to release staff to attend training but also maintain required ratio's.

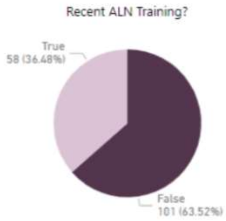
15.4.4 With regard to qualifications, the sector have particularly highlighted Disability Awareness, followed by CCLD Level V as the qualifications they would find most useful.

15.4.5 Information gathered via Dewis between March and December 2021 identified whether the sector felt they had sufficient understanding of and support in relation to those with additional learning needs (ALN).

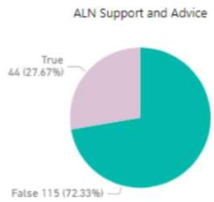
The first significant finding is that almost 3/4 (74%) felt they didn't have a working knowledge of ALN.



Alongside this, almost 2/3 (63.5%) felt they hadn't received recent ALN training.



Finally, on the question of support and advice on ALN, 72% felt they weren't receiving the guidance they need.

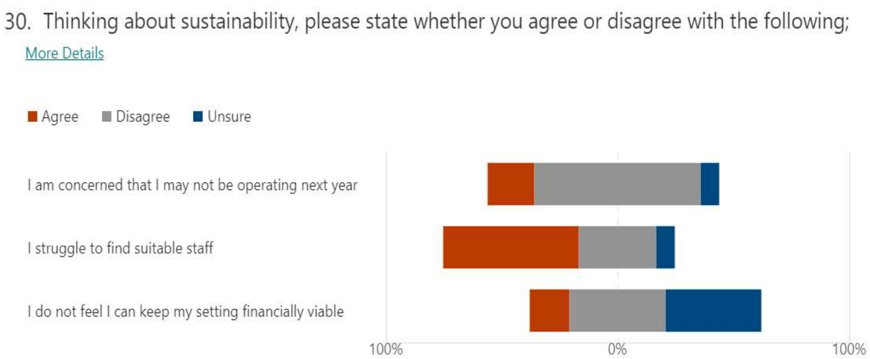


15.4.5.1 Each of these tables present a picture of a sector that felt – certainly at the time of submitting responses, that they didn't have the tools to effectively support children with ALN. It is significant to acknowledge that the authorities' Early Years ALN Team have taken great strides in the year after this information was gathered, so it would be very useful to re-capture this information and assess any change.

15.4.5.2 Early indications of the work undertaken by the Early Years ALN Lead Officer and speech and language elements of Pathfinder suggest a significant shift in settings' support and ability to meet all needs.

15.5 Staffing

15.5.1 As noted under sustainability, the majority of childcare managers have stated that they struggle to find suitable staff.



15.5.2 This appears to be the biggest issue facing the sector currently and is one that will require addressing in the short-term to ensure a positive picture long-term.

15.6 Support & Sustainability

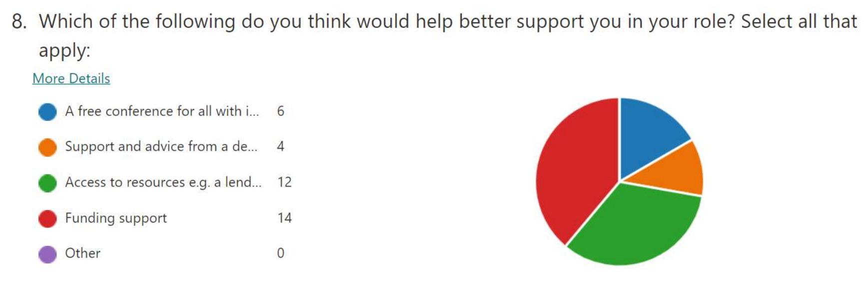
15.6.1 It is essential that the sector feel supported in all aspects of being able to offer a service to the highest possible standard.

15.6.2 Whenever the sector has been surveyed between 2017 and 2022, most notably in early 2021 as part of the CSA Progress Report, they consistently report that the support they receive locally from the local authority and their umbrella organisations is sufficient.

15.6.2.1 However, they have increasingly fed back a concern that they feel undervalued, particularly during the Covid-19 pandemic when they were pivotal in allowing keyworkers to undertake their vital role. Many felt this was overlooked.

15.6.3 It is worth noting that, historically, the local authority has been able to offer conferences, Workforce Development Activity Days and general networking but has largely been unable to do this during the pandemic. A priority should be to aim to re-establish these. Sector support meetings have been maintained but often virtually. This, in many respects proved to be more effective in supporting attendance.

15.6.5 Perhaps unsurprisingly, financial support was identified as the main way in which the sector could be supported, although as identified, this comes at a time when settings are receiving more financial support than ever. Notably, resources such as a lending library appeared a popular suggestion.



15.6.5.1 Other suggestions included Ideas and networking, Development workers or a Lending library. Further thoughts received as part of the 2022 CSA, from Swansea's childcare sector in terms of ways to support them include;

- *Regular on site and virtual visits to ensure that the childcare settings maintain high standards of care and provision and that there is a consistent approach across all.*
- *Hold regular Childcare Manager Meetings to share information and good practice.*
- *Support the Recruitment process in respect of Childcare Managers and Senior Childcare Workers.*
- *Provide guidance to support good practice in childcare settings (and review annually)*
- *Encouraging settings to achieve Early Years Wales Quality for All.*
- *Managing the "flow" of childcare in and out of settings by way of "managing" the outreach process, awareness of waiting lists, vacancies, unfilled spaces.*

- *Sustained Shared Thinking and Emotional Well-being (SSTEW) scale since 2016. During 22/23 the use of the SSTEW scale will be used to analyse quality.*
- *Pilot Planning in the Moment pedagogy via cross phase project – supporting settings.*
- *Create Individual Action Plans for each childcare setting, incorporating information from SSTEW assessments, CIW recommendations and QfA in order to further enhance practice.*
- *Working with the wider Early Years Team to provide a comprehensive training programme.*
- *Delivery of joint training (Flying Start settings and schools) to promote good practice in transition arrangements between the Flying Start settings and Foundation Phase nursery settings as well as developing good links with the wider school.*

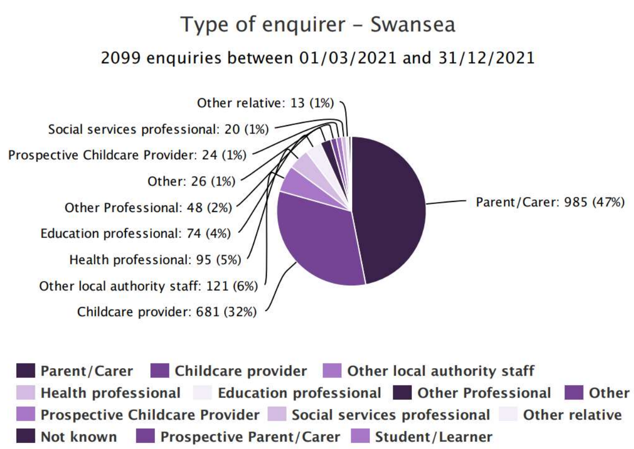
15.6.5.2 Staff were asked to comment on how else they can be supported, with the following being notable responses;

'Creating access to online training that can be completed at times and days convenient to individual practitioner. We need courses that we can sign up to and complete in the hours available to us around our working hours and family needs, for many of us this is evenings and weekends or early mornings and often at inconsistent times, for this reasons live learning, webinars and face to face teaching is difficult to attend. It would also be beneficial to have on online source that tells us what training courses are essential, extremely beneficial, best practice, related to progression, management oriented etc so that we can sign up to what best suits us and without feeling a constant pressure of trying to maintain adequate CPD. Unlike some settings, childminders are not given time remittance for training- we often must lose out financially, upset clients or our families by taking time away.'

'I feel the courses available are more than enough to support my role. There is a lot of variety of courses, which are repeated often'

15.6.6 Enquiries

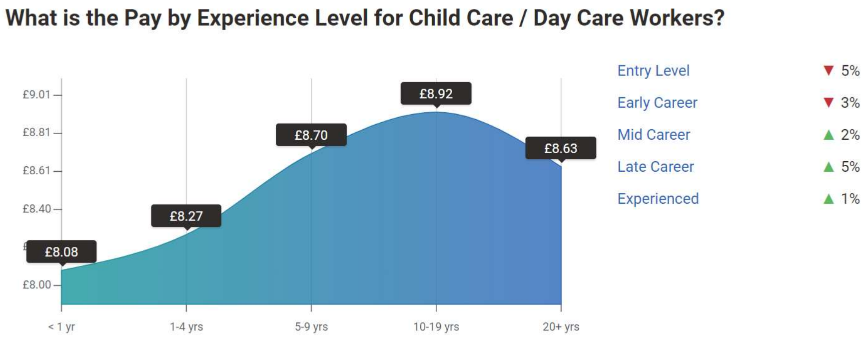
15.6.6.1 Dewis records the number and type of enquiries received and, notably, between March and December 2021, 32% of enquiries were from childcare providers which evidences the role in advising the sector.



15.7 Sector Pay

15.7.1 With a sense amongst the sector locally that they are not valued as much as some other professions, and with some reporting recruitment and retention issues, it is useful to look at data in relation to childcare staff pay.

There is a recognition that sector pay may compare detrimentally against many other professions, but an additional consideration is an apparent lack of salary increase over time. The average salary for someone employed less than a year is £8.08ph, yet someone employed for 20+ years will be averaging only £8.63ph.



Source: www.payscale.com
January 2022

15.7.2 Given that parent/carers are reporting cost of childcare to be the primary concern for them, this is not an issue that can simply be resolved by offering staff increased rates of pay.

Yet, it is equally apparent that a starting wage of £8.08ph and significantly a peak of £8.92ph after 10-19 years is not likely to consistently attract and retain high quality staff.

15.8 Quality Childcare

15.8.1 Key to developing the workforce is to ensure provision offered within childcare settings is of the highest quality. Quality can be measured in terms of the approaches incorporated as well as how settings are embedding key principles into their practice.

15.8.2 A particular focus in the time preceding the 2022 CSA was the development of Planning in the Moment – a pedagogical approach.

15.8.3 In terms of evidencing or measuring quality, there are a range of ‘quality mark’ type initiatives. The Healthy Sustainable Pre-School Scheme is one example of a quality mark aimed at enhancing settings’ approach to offering a healthy service to children in attendance.

15.8.4 Additionally, some umbrella organisations offer awards to celebrate sector achievement.

15.8.4.1 It is important that, given the recognised sense that staff feel undervalued, any quality marks are managed effectively to support development, rather than being seen as an extra burden.

15.8.5 Recognising Quality

15.8.5.1 Given the perception locally that the childcare sector feels undervalued and unrecognised, particularly as a result of the Covid-19 pandemic, it may be beneficial to offer some form of recognition ceremony either for individuals or for the sector as a whole.

15.8.5.2 Whilst most respondents stated the quality of childcare was high, it would be beneficial to develop an additional 'quality mark' to evidence quality in a range of areas, e.g. inclusivity, staff development, etc. Most umbrella organisations offer their own quality mark, but it may be beneficial to adopt a consistent mark to advise parent/carers who may enquire to Family Information Service about a setting that, for example, is particularly equipped for supporting a child with an additional need. This must note the considerations identified in 15.8.4.1.

15.8.3 A further consideration along similar lines to a quality mark is to develop a framework agreement for settings to comply with if they are to be in receipt of grant funding.

15.8.4 There is a concern that potentially in order to maintain ratio's settings are recruiting lower calibre of staff? Also not sure if the 50+ work features here and in the report i.e predominantly a young workforce so looking towards the more mature generation.

15. Workforce Development & Training – Summary of Key Findings

- In terms of the workforce overall, it is evident that there are a range of issues in relation to staff retention, recruitment and the sense of feeling valued.
- As expected, the sector appears to be predominantly female, although the survey responses showed a disproportionately high 'white British' response.
- With an additional concern fed back that childcare workers feel undervalued, particularly in light of their contribution to supporting the Covid-19 response, it is clear that work is needed to develop the status of childcare workers to encourage more into the sector.
- This is added to by the recognition of many examples of staff in the sector choosing to leave in favour of a more highly paid role with less pressure or responsibility.
- In terms of training, settings feel they are able to access a range of relevant training opportunities although all report the releasing of staff to attend training as problematic.
- Whilst most respondents stated the quality of childcare was high, it would be beneficial to include a 'quality mark' to evidence quality in a range of areas, e.g. inclusivity, staff development, etc.

• The development of a Workforce Strategy is key to addressing identified issues and must be developed in conjunction with the findings and actions of the CSA

15. Workforce Development & Training – Action Plan				
Challenge	Action	Responsible	Timescale	Outcome
15a Sense of sector feeling 'undervalued' or unappreciated	15a Promote the sector including its key contribution with a view to increasing recognition and encouraging new staff into the sector	LA & Partners	March 24	Increased sense of feeling valued among sector staff
15b Recruitment and retention issues faced by settings	15b Further promotion of childcare as a career option 15b Look to incentivise career development 15b Identify barriers that may prevent new recruits into training. 15b Explore parts of the sector where the retention of staff has been successful. 15b Explore potential for a centre of excellence / training centre	LA & Partners LA LA & Partners / Careers Advice LA & Partners LA & Partners including FE/HE	Ongoing March 24 March 25 March 24 March 25	Increase numbers on courses and in roles Identify means of incentivising to retain staff Barriers are addressed with increased take-up Good practice is shared for mutual gain Identification of good practice
15c Continued Professional Development (CPD) is essential and barriers must be addressed	15c Identify avenues used to support CPD E.g. FIS etc. 15c Address and respond to barriers to managers releasing staff to attend training	LA LA & Partners	March 23 March 23	CPD path identified and promoted Identified response, e.g. grant funding, on-line courses, etc.
15d What is the next step for those with new childcare qualifications?	15d Identify leavers from local colleges' and training providers. 15d Understand leavers' plans after training. Offer	LA & Partners LA & Partners	March 23 March 24	Agreed system for identifying graduates and offering support Evidence of positive impact of support

	advice and guidance to support recruitment of childcare and play workers			
15e Number of Welsh speakers entering employment in Childcare/Play. Current number of welsh speakers working in Childcare/Play	15e Contribute to Swansea's 10 year Welsh Language Plan. 15e Further development of the Active Offer	LA & Partners LA & Partners	Ongoing Ongoing	Childcare contribution to plan development Increased involvement amongst settings
15f Address number of staff who don't hold a relevant qualification	15f Further assessment of qualification levels	LA	March 24	Increase level of qualifications amongst sector
15g Development of Digital Offer	15c Support roll-out of the Digital Offer amongst settings	LA & Partners	March 25	Settings equipped to deliver Digital Offer
15h Adopt appropriate approaches to quality	15h Further develop pedagogical approach Include Workforce Strategy	LA & Partners	March 24	Pedagogical approach is utilised within settings
15i Identified benefit of having a consistent quality mark across all settings	15i Development of Swansea-specific quality standards 15i Support and incentivise quality schemes, e.g. Healthy Sustainable Pre-School Scheme	LA & Partners	March 2024	Ability to evidence good practice – beneficial to parent/carers as well as the local authority
15j Need to evidence compliance with required standards	15j Consider developing a framework agreement for settings to adhere to	LA & Partners	March 24	Framework in place
15k Need to increase awareness in childcare roles	15k Work with Social Care Wales to promote different roles within the sector	LA & Partners	March 25	Increased awareness
15l Referrals to Swansea's Early Years ALN team shows increase in number of children	15l Identify appropriate training qualifications that could be achieved by staff who wish to	LA & Partners	March 24	Increased level of staff able to offer appropriate support

receiving staff support and number of hours increased per child.	carry out a staff support role.			

16. Gap Analysis

13.1 Requirements

16.1.1 The Gap Analysis must be evidenced by what is included in the assessment above.

16.1.2 It must consider and cover any gaps in childcare provision for children and in particular for parents who work atypical hours; Welsh medium childcare provision and childcare provision for different language categories.

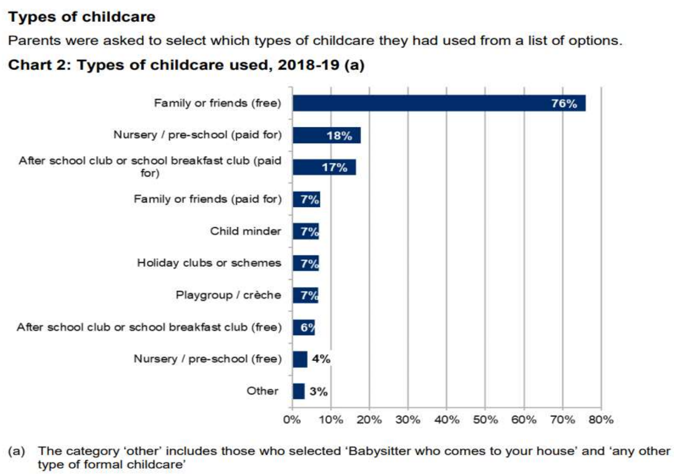
16.1.3 Additionally, it was felt that this section may provide a good opportunity to look at any national findings to determine whether any findings are 'Swansea-specific' or shared across each authority.

13.2 Key Identified Gaps

16.3 National Findings & Issues

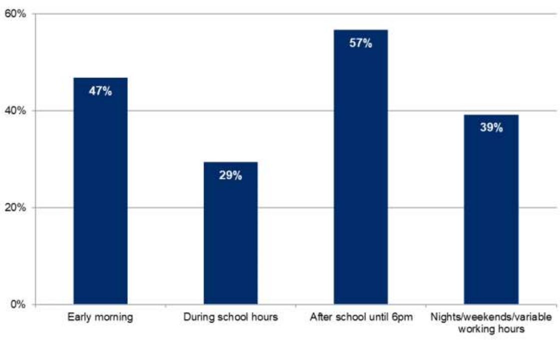
16.3.1 In identifying sufficiency, it is beneficial to provide comparisons with other areas. Much of this has already occurred within specific sections, but the National Survey for Wales provides some useful context. Notably, the use of family & friends for childcare is something that is reflected across the nation.

[National Survey for Wales, 2018-19: childcare (gov.wales)]



16.3.2 In terms of when childcare is needed, most of the respondents referred to after school care, while 29% looked at full day care. The national need for unsociable hours appears higher than in Swansea.

Chart 4: Time of day childcare needs improving, 2018-19 (a)



(a) Parents could give more than one response so percentages may sum to over 100%.

Over half of the parents who found accessing suitable childcare difficult said they would like improved childcare from 3pm to 6pm. Parents also had difficulty arranging childcare early in the morning, at night, at weekends and to cater for variable work patterns.

16.3.3 Looking at why childcare isn't used, the national picture refers to almost ¾ of respondents having one parent always around to provide care. This figure doesn't appear to reflect Swansea in terms of reasons given.

Chart 5: Reasons why childcare wasn't used, 2018-19

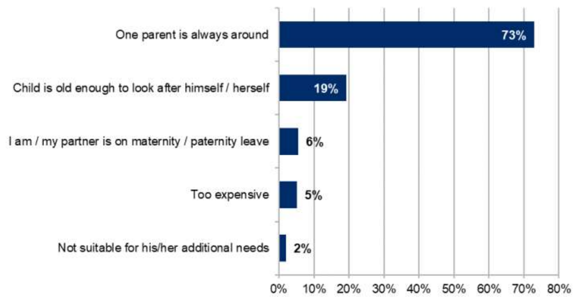


Chart 5 shows that the most common reason parents gave for not having used childcare is that one parent is always around (73%). Looking at these results in more detail:

- 79% of parents of children aged 0-4 said that one parent is always around, compared with 85% of parents of children aged 5-11 and 51% of parents of children aged 12-14.

16.4 Gaps in Reporting

16.4.1 It is felt that the 2022 CSA has provided a thorough assessment of the childcare sector within Swansea, including each of the required elements within the guidance.

16.4.2 Yet there have been some areas for which it was established that there is either insufficient data held, feedback gained, or will just require further assessment. Each of these have been given specific actions, but include;

- The quality of unregistered provision
- A view of being 'unable to meet the needs of non-English/Welsh children and what this implies
- It appears there is a shortage of Welsh medium provision although this needs further consideration
- A view that quality of holiday provision is lower than year round
- A suggestion that parents would choose more formal childcare, ideally bilingually but are unable to
- There is a perceived 'over-supply' based on findings but these are heavily impacted by when data was obtained and Covid-19. An additional assessment will be required to confirm if this is the case.

16.5 Gaps in Provision

16.5.1 Whilst each section will detail specific gaps in provision, the following have been specifically identified as provision-related gaps within Swansea at the current time;

- Staff retention issues consistently identified
- Provision within previously identified areas of Gower and Mawr
- There is a reported shortage of Welsh medium provision

16. Gap Analysis – Summary of Key Findings

• The key finding from looking at gaps overall is the recognition that Swansea appears to be in a relatively positive position in terms of childcare.
• However, this is heavily caveated on the fact that the assessment took place during a time of Covid-19 restrictions and home working which may not be reflective of the ongoing situation.
• There appear to be gaps in certain areas for which actions have been identified.
• At the same time, even with the considerable commitment to assessing sufficiency over the past year, most perceived gaps need further consideration. Perhaps reassuringly, there were no overriding gaps that stood out for immediate address.

16. Gap Analysis – Action Plan

Challenge	Action	Responsible	Timescale	Outcome
16.1 Need to ensure that all identified gaps are addressed.	16.1 Ensure CSA Action Plan has SMART targets and monitoring in place to address gaps	LA	March 25	Evidence of process towards addressing gaps and details of progression
16.2 Identification of key partners to	16.2 Partners identified including comms as appropriate	LA & Partners	March 23	Evidence of collaborative

support addressing of gaps				approach to addressing gaps

17. Summary of Unmet Needs

17.1 It is necessary to consider unmet needs across types of childcare available; age of children for whom childcare is available; affordability of childcare; times at which childcare is available; and the location of childcare.

17.2 As such, unmet needs are identified within each specific section. Whilst there are no major cases of unmet needs, there are certainly examples of where an identified need might require additional consideration. These are;

- Where several parents have stated an unmet requirement for Welsh medium childcare requiring them to go to a neighbouring County to access care
- Feedback that provision may not meet a child's individual needs, although it is felt that the development of the Early Years ALN Team will largely address this

17.3 Notably, there are areas in which a request may not be regarded as a 'need'. The main area here is where parents/carers report they felt they had access to childcare but would like more 'choice'. This is seen more as a matter of quality rather than an unmet need.

17. Summary of Unmet Needs – Summary of Key Findings

• The 2022 CSA has allowed a wide range of service users and stakeholders to identify where they feel their childcare needs are not being met.
• The two most frequently stated instances of needs being unmet relate to Welsh medium care and in relation to meeting specific needs of disabled children and those with additional learning needs.

17. Summary of Unmet Needs – Action Plan				
Challenge	Action	Responsible	Timescale	Outcome
17.1 Need to determine whether perceived unmet needs are correct	Undertake additional research and consultation in terms of Welsh medium provision and support for ALN	LA	March 23	Identify whether two areas are considered an unmet need and respond accordingly

18. Summary of Childcare Sufficiency in Swansea in 2022

18.1 Overview

18.1.1 This assessment provides a useful overview of childcare requirements and provision across Swansea.

18.1.2 It demonstrates a relatively healthy picture both in terms of the range and quality of childcare provision available, as well as the over-arching infrastructure of support and development.

18.1.3 Inevitably, the impact of Covid-19 has been a major factor at the time of conducting the assessment and for some time before. Perhaps more significantly, the ongoing implications for the sector are likely to be unclear, which makes planning and priority setting problematic.

18.1.4 Additionally, the assessment comes prior to the proposed expansion of Flying Start which will likely have a significant impact.

18.2 Key Issues

18.2.1 The most frequently reported issue by some distance was the cost of childcare and its impact on families' ability to work.

18.2.2 Additionally, a key theme that emerged several times was how the 'prohibitive costs' meant parents were using friends and family to provide care, when they would prefer their child to attend something more formal.

18.2.3 There would appear to be grounds to suggest that if formal childcare was cheaper, or financial barriers were otherwise removed, that attendance would increase.

18.2.4 Notably, the take-up of tax free childcare is lower within Swansea than other areas. Increased take-up would have benefits both in terms of the families paying reduced costs and to the settings who would likely see an increase in attendance as more families find the care to be financially viable.

18.2.5 There are perceived shortages that have been reported by families in terms of both Welsh Medium provision and whether settings can meet specific requirements of children with additional learning needs but both of these will require additional investigation. Notably, settings' ability to cater for all needs will have been enhanced by the work of the newly formed Early Years ALN Team.

18.3 Recommendations

18.3.1 It is recommended that the actions laid out in section 19 are implemented via a coordinated approach.

18.3.2 The post of Sufficiency Assessment Support Officer was originally intended to act as a 'task and finish' post to undertake this and the Play Sufficiency Assessment. However, it has been evident that a dedicated post to support sufficiency will significantly aid the ability to both assess and respond to matters of sufficiency and it has been recommended that the post be continued.

18.3.3 The following pages detail proposed actions to respond to areas raised. The Childcare & Play Sufficiency Manager will work alongside the Sufficiency Assessment Officer in bringing this plan to life and engaging appropriate internal and external partners in doing so. The Childcare Sufficiency Working Group will be re-established to ensure a collaborative approach.

18.3.4 Additionally, given the impact of Covid-19 on findings and on the potential impact of proposed actions, it is essential to use the recommendations and actions as having potential to require re-addressing if circumstances change.

18.3.5 Annual progress reports will be completed and shared to demonstrate relative progress towards achieving identified outcomes.

19. Action Plan

19.1 The action plan sets out requirements to address areas of deficiency identified within the assessment.

19.2 Additionally, for areas that are deemed sufficient, the plan must consider appropriate steps to maintain that level.

19.3 As previous CSA's have identified apparent gaps that have subsequently turned out to not be issues, the 2022 Action Plan includes more actions to further investigate a perceived gap or issue. This will make actions more effective and meaningful rather than committing resources to an action that may not be needed.

Section	Detail	Action	Who	Timescale	Resources	Outcome
1. Strategic Direction	1.1 Need to ensure a coordinated approach for service recipients	1.1 Further development of Early Years 'Front Door' type approach	LA / Partners	Ongoing	Officer/Partner time	Single point of entry is identified with effective mechanisms in place
	1.2 Need to ensure CSA findings and recommendations are drivers for childcare policy and funding	1.2 Ensure findings and actions are included within local policy and strategic planning 1.2 Ensure local funding criteria reflects findings of CSA	LA	Ongoing	Officer/Partner time Existing core/external funding	All relevant policy and planning gives due regard to CSA findings and recommendations
	1.3 Ensure internal and external partners are supported to contribute to CSA implementation	1.3 Assess internal capacity including maintaining Sufficiency Assessment support role		March 23	Existing core/external funding	Continued sufficiency support in place to identify and respond to need

		1.3 Ensure external partners e.g. development officers are effectively resourced			Existing external funding	Capacity to support settings and develop priority actions
2. Partnership Working and Consultation	Ensure ongoing engagement	Annual stakeholder surveys Identify additional findings and trends	LA / Partners	Annually	Officer/Partner time Officer/Partner time	Gaps and needs are identified
	Recognition of the necessity of a partnership approach to effectively achieve sufficiency	Continue to fund umbrella organisations' development officers with targets to reflect sufficiency	LA / Umbrella Orgs	Ongoing	Existing external funding	Support in addressing actions and priorities
	Need to ensure parents' views are heard more than once every 5 years	Undertake annual parent/carer consultation Develop social media presence to allow views to be fed in	LA / Partners LA	Annually March 23	Officer/Partner time Officer/Partner time	Ensure current needs are identified Support opportunities to feed views in
3. WESPS	3.1 Need to promote the benefits of being bilingual.	3.1 Increase the Welsh-medium pre-school offer as part of a wider marketing strategy	LA & Partners	March 25	Existing / new grant funding	An increase in the number of pre-school places available through Welsh medium
	3.2 Need to develop Welsh-medium wraparound childcare	3.2 Work with Mudiad Meithrin to open 3 new Cylch Meithrin settings (currently 7 settings in	LA / Mudiad Meithrin	March 25	Existing / new grant funding	An increase in the number of wraparound places

	options to support parents.	Swansea) in the school catchment areas of YGG Lon Las, YGG Y Login Fach and YGG Tan-y-lan and explore opportunities 3.2 Additionally, look to increase development officer capacity to enable this				available through Welsh medium
	3.3 Need to increase the opportunities for early Welsh language interaction for parents and their children	3.3 Work with Mudiad Meithrin and other partners to start 5 new Cylchoedd Ti a Fi (currently 9 in Swansea)	LA / Mudiad Meithrin	March 25	Existing external funding	Increase in number of families with confidence to choose welsh medium childcare
	3.4 Need to increase the use of Welsh and explore opportunities for more Welsh language settings	3.4 Develop a Welsh language strategy across all our Flying Start settings 3.4 Work with Cwlwm partners promoting the Camau Projects	LA / Partners	March 24	Officer/Partner time Officer/Partner time	Strategy in place with measurable outcomes aimed at increasing use of Welsh
	3.5 Need to ensure Welsh medium development support is in place to help meet actions	3.5 Continue to fund Mudiad Meithrin development hours	LA	Ongoing	Existing external funding	Welsh medium development support in place to help achieve outcomes

	3.6 Need to promote CIW registration of Out of School Clubs servicing Welsh medium schools (5 out of 9 unregistered) so there is suitable childcare as the child grows.	3.6 Promote benefits of registration to identified settings	LA / Partners	Ongoing	Officer/Partner time	Increase in registration amongst identified settings
4. Overview – Childcare Types, Services and Places						
5. Supply of Childcare	5.1 Perceived over-supply may be due to Covid	Need to annually monitor vacancies to determine whether correct	LA	Annually	Officer/Partner time	Determine level of supply
	5.2 Potential that unregistered holiday provision may impact on registered provision's opportunity to provide care	5.2 Ensure funding is not allocated to unregistered provision where CIW registered holiday care already exists	LA & Partners	March 24	Existing core / external funding	Registered provision is not losing out to cheaper unregistered care
	5.3 Unregistered nature of holiday activity clubs means quality and good practice is harder to determine	5.3 Closer engagement with unregistered holiday provision 5.3 Encourage registration and support to obtain qualifications	LA / Partner Organisations	Ongoing	Officer/Partner time Officer/Partner time	Increased relationship for mutual benefit Potential to monitor practice

	5.4 Many parents are unfamiliar with the difference between registered and unregistered settings	5.4 Increased understanding of the benefits of CIW registered provision	LA & Partners	March 23	Officer/Partner time	Parents better advised to make decisions
	5.5 22% of settings stated that they were unable to care for 'non-English/Welsh' children.	Additional assessment to determine what is meant and action as appropriate	LA & Partners	March 23	Officer/Partner time	Clearer picture obtained and response as appropriate
6. Needs of Parents/ Carers (Demand for childcare)	6.1 High number of respondents stating cost is a barrier to childcare	Increase take-up of tax credits (see 13) Work with settings on sibling discounts and other	LA & Partners	Ongoing	Officer/Partner time Existing core / grant funding	Increase in families accessing tax credits Fewer reporting cost is a barrier
	6.2 Parents reporting a lack of 'choice' of childcare (while noting they have childcare available)	Consider implication of 'choice' as potential matter to address	LA	March 24	Officer time	Identify whether insufficient choice means more provision is needed
	6.3 Perceived finding that parents would prefer formal care but later opt for informal care.	Undertake additional research / engagement to identify reasons for this	LA & Partners	March 23	Officer/Partner time	Additional evidence to identify any specific barriers to realising aim
	6.4 Need to engage parent/carers in planning and policy development	Development of Parent Champions	LA	March 23	Officer time	Parent Champions in place and engaged

	6.5 Satisfaction with quality of holiday provision was proportionately lower than term-time	Further assessment of why this difference exists and corrective measures where appropriate	LA	March 24	Officer time	Identify if satisfaction is lower and address reasons
	6.6 Suggestion that more families would like their child to attend Welsh medium provision than is currently available	Further assessment of why they feel this	LA & Partners	March 24	Officer/Partner time	Identification of whether this represents a deficiency
	6.7 Ensuring that parental needs identified within CSA are followed up to confirm validity	Develop social media presence or other parental engagement to 'test' key findings	LA & Partners	March 23	Officer/Partner time	Social media 'childcare sufficiency presence' in place
	6.8 Consider Coram finding of shortfall in holiday care for 12-14 years	Identify whether an issue or case of low demand	LA & Partners	March 25	Officer/Partner time	Research completed evidencing gap or otherwise
7. Geographical Distribution	7.1 Potential lack of childcare in identified areas	Further assessment to identify whether 'perceived deficiency' is the case.	LA & Partners	March 23	Officer/Partner time	Identify whether perceived gaps are correct and respond accordingly
	7.2 Respond to identified gaps in distribution	Undertake engagement in areas identified as deficient	LA & Partners	March 23	Officer/Partner time	Look to increase provision in key areas
8. Sustainability	7.3 Consider potential over-supply in some areas	7.3 Assess potential over-supply and any issues it may create	LA & Partners	March 24	Officer/Partner time	Identify if over-supply can affect sustainability

	8.1 Need to identify future setting sustainability	8.1 Undertake business health checks 8.1 Sector survey to assess sustainability 8.1 Advise on grant funding to support sustainability	LA & Partners	Ongoing March 23 Ongoing	Officer/Partner time Officer/Partner time Officer/Partner time	Identify sustainability of settings including concerns Additional means to assess Financial support for settings
	8.2 Many settings are unsure if they will be operating in next 1-2 years	8.2 Identify why this is felt and what can be done to address it	LA & Partners	March 23	Officer/Partner time	Potential closures can be addressed where appropriate
	8.3 Potential reduction in childcare requirements	8.3 Further investigation including vacancy monitoring	LA & Partners	March 23	Officer/Partner time	Better able to identify demand on ongoing basis
	8.4 Concern that recruitment issues are affecting sustainability and quality	8.4 Consider as part of workforce development section	LA & Partners	Ongoing	Officer/Partner time	As detailed within section 14
9. Cross Border	9.1 Identify whether settings on county borders are unduly impacted by cross-border requests	9.1 Additional research with relevant settings to identify if a factor	LA & Partners	Ongoing	Officer/Partner time	Gain additional insight into needs
10. Covid-19	10.1 Ensure settings continue to be sustainable following the	10.1 Work with partners to identify whether settings are becoming	LA & Partners	March 23	Officer/Partner time	Identification of whether there is a dependency or

	end of any additional sustainability funding	reliant upon additional funding				settings are self-sufficient
	10.2 Ensure children do not lose out on essential social development through non-attendance at formal childcare	10.2 Promote the value of childcare and the benefits of play to parents/carers whether they work away from home or at home, e.g. The Choosing Childcare booklet	LA & Partners	Ongoing	Officer/Partner time	Children's right to play is not overly impacted by lack of attendance at childcare provision Parents are better advised to make decisions on care
	10.3 Need to identify whether priorities identified during Covid continue to be relevant	10.3 Ensure annual progress reports assess covid-related targets and whether they remain valid, before determining whether to maintain or remove	LA & Partners	Annually	Officer/Partner time	Ensure targets remain valid
11. Population	11.1 The high proportion of deprived LSOA's and providing affordable childcare	11.1 Work within Townhill, Penderry and other deprived areas to increase affordable childcare opportunities	LA & Partners, Local Area Coordinat ion	March 24	Existing core / external funding	Families in priority areas feel more able to use formal childcare
	11.2 Given high employment in health, it is important that provision meets need	11.2 Undertake additional engagement with local health board to assess sufficiency	LA	March 23	Officer time	Increased understanding of childcare needs of key sector
	11.3 With fewer females than males in employment, yet earning	11.3 Additional consultation to identify	LA & Partners	March 24	Officer/Partner time	Identification of whether potential high earners are

	more, does childcare act as a gender-related barrier to earning?	childcare / career choices				prevented from employment due to care requirements
12. The CSA and Local Well-being Plans	12.1 Continue to evidence childcare's contribution to addressing poverty	Contribute to Poverty Forum & Strategy	LA	Ongoing	Officer Time	Those living in poverty are better supported to use formal childcare
	12.2 Ensure childcare is recognised within education planning	Engage education colleagues to ensure representation	LA	March 23	Officer Time	School-based settings feel their needs are understood and considered
	12.3 Ensure key housing developments are considered when planning sufficiency	12.3 Engage LDP lead in working group and identify key strategic sites	LA	Ongoing	Officer Time	Where significant increased housing will take place, there is a plan for addressing increased demand for childcare
	12.4 Ensure childcare contribution to Wellbeing Plan and other policy and strategy is recognised and monitored	12.4 Identify relevant policy and ensure links exist and contributions made	LA	Ongoing	Officer Time	Childcare is recognised and considered within relevant policy
13. Barriers to Childcare Provision	13.1 Cost of childcare is the primary concern for families	13.1 Encourage settings to offer sibling discounts and other reduced costs	LA & Partners	March 23	Existing Core / external funding	Families of multiple children finding formal childcare more affordable

		13.1 Disseminate Choosing Childcare booklet which includes a section on help with the cost of childcare.		March 23		Increased understanding of support with childcare costs
	13.2 Low take-up of Tax-Free Childcare	13.2 Undertake an awareness campaign to increase take-up 13.2 Look to address the apparently lower take-up in Swansea East 13.2 Increase settings' awareness and ability to advise families of benefits 13.2 Increase the number of settings registered to support the scheme	LA & Partners LA LA & Partners LA	March 23 March 24 March 23 March 25	Officer/Partner time Officer Time Officer/Partner time Officer Time	Increased awareness from families Increased take-up in Swansea East Settings reporting increased ability to advise parents Increase in number registered
	13.3 Settings' response (March 2021) that they do not feel they have the knowledge and support to effectively care for children with ALN	13.3 Continue roll-out of ALN support and training 13.3 Undertake additional research to identify if view has changed	LA LA	Ongoing March 23	Officer Time Officer Time	Increase in numbers having attended training Increase in settings feeling confident in meeting needs

	13.4 The need to ensure families are aware of support at the earliest opportunity	13.4 Identify an effective process for informing families of support to access childcare	LA & Partners	March 23	Officer/Partner time	Families with children with ALN / Disabled are supported earlier
	13.5 View of some families that welsh medium provision is not available to them	13.5 Undertake specific work to gauge levels of Welsh medium provision and map against demand	LA	March 24	Officer/Partner time	Identification of gaps or barriers to welsh medium provision
14. Free Nursery Education, Flying Start and Childcare Offer provision	14.1 The proposal to extend funded childcare to 2 year olds	14.1 Plan for the impact of the extension including resources	LA	March 23	Officer Time	Successful role-out of expansion with associated benefits
	14.2 Consider Flying Start's Welsh Offer	14.2 Develop a plan for meeting need	LA & Partners	March 23	Officer/Partner time	Requirements for Welsh provision met
	14.3 Need to support those in need outside of Flying Start catchment	Further develop and extend Flying Start Outreach	LA	March 24	Existing / new funding	Effective outreach programme in place meeting needs of priority families
15. Workforce Development and Training	15a Sense of sector feeling 'unvalued' or unappreciated	15a Promote the sector including its key contribution with a view to increasing recognition and encouraging new staff into the sector	LA & Partners	March 24	Officer/Partner time	Increased sense of feeling valued among sector staff
	15b Recruitment and retention issues faced by settings	15b Further promotion of childcare as a career option	LA & Partners	Ongoing	Officer/Partner time	Increase numbers on courses and in roles

		15b Look to incentivise career development 15b Identify barriers that may prevent new recruits into training. 15b Explore parts of the sector where the retention of staff has been successful.	LA LA & Partners / Careers Advice LA & Partners	March 24 March 25 March 24	Officer/Partner time Officer/Partner time Officer/Partner time	Identify means of incentivising to retain staff Barriers are addressed with increased take-up Good practice is shared for mutual gain
	15c Continued Professional Development (CPD) is essential and barriers must be addressed	15c Identify avenues used to support CPD E.g. FIS etc. 15c Address and respond to barriers to managers releasing staff to attend training	LA LA & Partners	March 23 March 23	Officer/Partner time Existing core / external funding	CPD path identified and promoted Identified response, e.g. grant funding, on-line courses, etc.
	15d What is the next step for those with new childcare qualifications?	15d Identify leavers from local colleges' and training providers. 15d Understand leavers' plans after training. Offer advice and guidance to support recruitment of childcare and play workers	LA & Partners LA & Partners	March 23 March 24	Officer/Partner time Officer/Partner time	Agreed system for identifying graduates and offering support Evidence of positive impact of support

	15e Number of Welsh speakers entering employment in Childcare/Play. Current number of welsh speakers working in Childcare/Play	15e Contribute to Swansea's 10 year Welsh Language Plan. 15e Further development of the Active Offer	LA & Partners LA & Partners	Ongoing Ongoing	Officer/Partner time Existing core / external funding	Childcare contribution to plan development Increased involvement amongst settings
	15f Address number of staff who don't hold a relevant qualification	15f Further assessment of qualification levels	LA	March 24	Officer/Partner time	Increase level of qualifications amongst sector
	15g Development of Digital Offer	15c Support roll-out of the Digital Offer amongst settings	LA & Partners	March 25	Officer/Partner time Existing core / external funding	Settings equipped to deliver Digital Offer
	15h Adopt appropriate approaches to quality	15h Further develop pedagogical approach Include Workforce Strategy	LA & Partners	March 24	Officer/Partner time	Pedagogical approach is utilised within settings
	15i Identified benefit of having a consistent quality mark across all settings	15i Development of Swansea-specific quality standards 15i Support and incentivise quality schemes, e.g. Healthy Sustainable Pre-School Scheme	LA & Partners	March 2024	Officer/Partner time Officer/Partner time	Ability to evidence good practice – beneficial to parent/carers as well as the local authority
	15j Need to evidence compliance with required standards	15j Consider developing a framework agreement for settings to adhere to	LA & Partners	March 24	Officer/Partner time	Framework in place

	15k Need to increase awareness in childcare roles	15k Work with Social Care Wales to promote the different roles within the sector	LA & Partners	March 25	Officer/Partner time	Increased awareness
	15l Current referrals to Swansea's Early Years ALN team shows increase in number of children receiving staff support and number of hours have also increased per child.	15l Identify appropriate training qualifications that could be achieved by staff who wish to carry out a staff support role.	LA & Partners	March 24	Existing / new grant funding	Increased level of staff able to offer appropriate support
16. Gap Analysis	16.1 Need to ensure that all identified gaps are addressed.	16.1 Ensure CSA Action Plan has SMART targets and monitoring in place to address gaps	LA	March 25	Officer/Partner time	Evidence of process towards addressing gaps and details of progression
	16.2 Identification of key partners to support addressing of gaps	16.2 Partners identified including comms as appropriate	LA & Partners	March 23	Officer/Partner time	Evidence of collaborative approach to addressing gaps
17. Summary of Unmet Needs	17.1 Need to determine whether perceived unmet needs are correct	Undertake additional research and consultation in terms of Welsh medium provision and support for ALN	LA	March 23	Officer/Partner time	Identify whether two areas are considered an unmet need and respond accordingly

20. Checklist

Area	Requirement	Evidence	Complete Y / N

Reference List:

Childcare Act (2006). Welsh Government. https://www.legislation.gov.uk/wsi/2008/169/contents/made

Childcare Statutory Guidance (2016). Welsh Government. https://gov.wales/sites/default/files/publications/2019-06/childcare-statutory-guidance-for-local-authorities.pdf

WESP - Ten year vision (September 2022 - August 2032). Swansea Council. https://www.swansea.gov.uk/wesptenyearvision

DEWIS (2021). https://www.dewis.wales/

Coram Family and Childcare (2021). Holiday Childcare Survey. https://www.familyandchildcaretrust.org/holiday-childcare-survey-2021

Annual Population Survey (2021). ONS. https://www.nomisweb.co.uk/home/release_group.asp?g=16

Population Data- mid-year estimates. Swansea Council. https://www.swansea.gov.uk/article/10847/Population

Local Wellbeing Plan (2018). Swansea Council. https://www.swansea.gov.uk/localwellbeingplan