Carmarthenshire County Council

Carmarthenshire Childcare Sufficiency Assessment (2022-27)

SUMMARY REPORT

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1   PRINCIPAL STATEMENT

I am pleased to present Carmarthenshire County Council's fifth Statutory Childcare Sufficiency Assessment (2022-27).

The Welsh Government's ambition is to create a single, high-quality, child-centred approach to early childhood education and care to ensure all children get the best possible start in life. We know that early childhood experiences play a significant role in shaping our futures and are critical to the chances of leading a healthy, prosperous, and fulfilling life. Ensuring that every child has access to the same, high-quality support in the early childhood education and care they receive is key to this.

2020-22 has been unprecedented because of the Covid 19 Pandemic. The lockdown periods and resulting national restrictions on people's movements and behaviours have brought many challenges for local children, families, and the childcare sector. It has tested resilience, wellbeing and our abilities to cope and bounce back, from what has been a very unsettling and uncertain period of time. The pandemic has highlighted the crucial role childcare plays in keeping vital services running and providing a safe and nurturing environment for children to flourish. Childcare providers' dedication and commitment to continue operating throughout the pandemic has been exceptional.

This report gives an overview of Carmarthenshire's childcare market, considering the impact of the pandemic, in accordance with the Statutory requirements of Sections 22 and 26 of the Childcare Act 2006, the Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016, Welsh Government Statutory guidance issued in July 2016 and supplementary guidance issued in March 2021.

At a Local Authority level, we continue to champion the delivery of high-quality services which truly reflect local priorities, and in which the needs and best interests of the child are paramount. We are committed to ensuring that provision is flexible for all families, and that our childcare providers are supported in delivering high quality, sustainable provision.

As part of the assessment process, we have again consulted extensively to establish what parents, carers, children and young people, employers, headteachers, further education providers and childcare partners think about our childcare provision, and what developments they would like to see. The response rates were exceptional, and we would like to thank everyone who took the time to provide us with valuable feedback. We have listened to what we have heard and have considered the relevant data and research to inform our recommendations and Action Plan.

We aim to use the findings to make the best use of resources, by targeting support in identified areas where childcare is needed, identifying areas where unmet need exists and where market opportunities exist for potential future development. We have developed an Action Plan and intend to use existing resources in a creative and innovative manner, and to collaborate with our partners in the childcare sector and wider community, to ensure that children in Carmarthenshire have access to high quality provision and the best possible start in life. Our Action Plan will be reviewed and monitored at mid and end of year intervals to ensure that it continues to be fit for purpose and addresses evolving needs and priorities including pandemic related issues and challenges. We will produce a Progress Report detailing the progress made at the end of each financial year.

This assessment is an important piece of research and will enable us to continue to map the supply of childcare against the demand for it and continue to contribute to achieving better outcomes for children and their families.

There are exciting childcare developments ahead; the universal offer of free childcare for all two years olds, the expansion of the Flying Start Programme and the and the extension of the Childcare Offer for three and four year olds which will include parents on adoption leave and parents in education and training. These developments will offer additional support for families at a time when it is much needed and help to sustain and offer expansion opportunities for our local childcare sector.

Gareth Morgans
Director – Education and Children's Services

2   INTRODUCTION / CONTEXT

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

The Assessment is a necessary step to securing 'sufficient' childcare provision in our County of Carmarthenshire. It aims to identify childcare gaps and make recommendations that will meet the needs of parents and carers living in the County and ensure Carmarthenshire County Council fulfils its statutory childcare sufficiency Duty.

2.2   Carmarthenshire County Council has published four full Childcare Sufficiency Assessments to date in 2008, 2011, 2014 and 2017 respectively. Action Plans were developed linked directly to the recommendations that had been made in all four Assessments. These have been reviewed and updated on an annual basis in order to monitor progress made – as will the recommendations contained in this report.

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

2.4   The 2022 CSA was undertaken by Place Group Ltd supported by the Family Information Childcare and Play Team within Carmarthenshire County Council.

In undertaking the full 2022 Childcare Sufficiency Assessment, several types of research were undertaken:
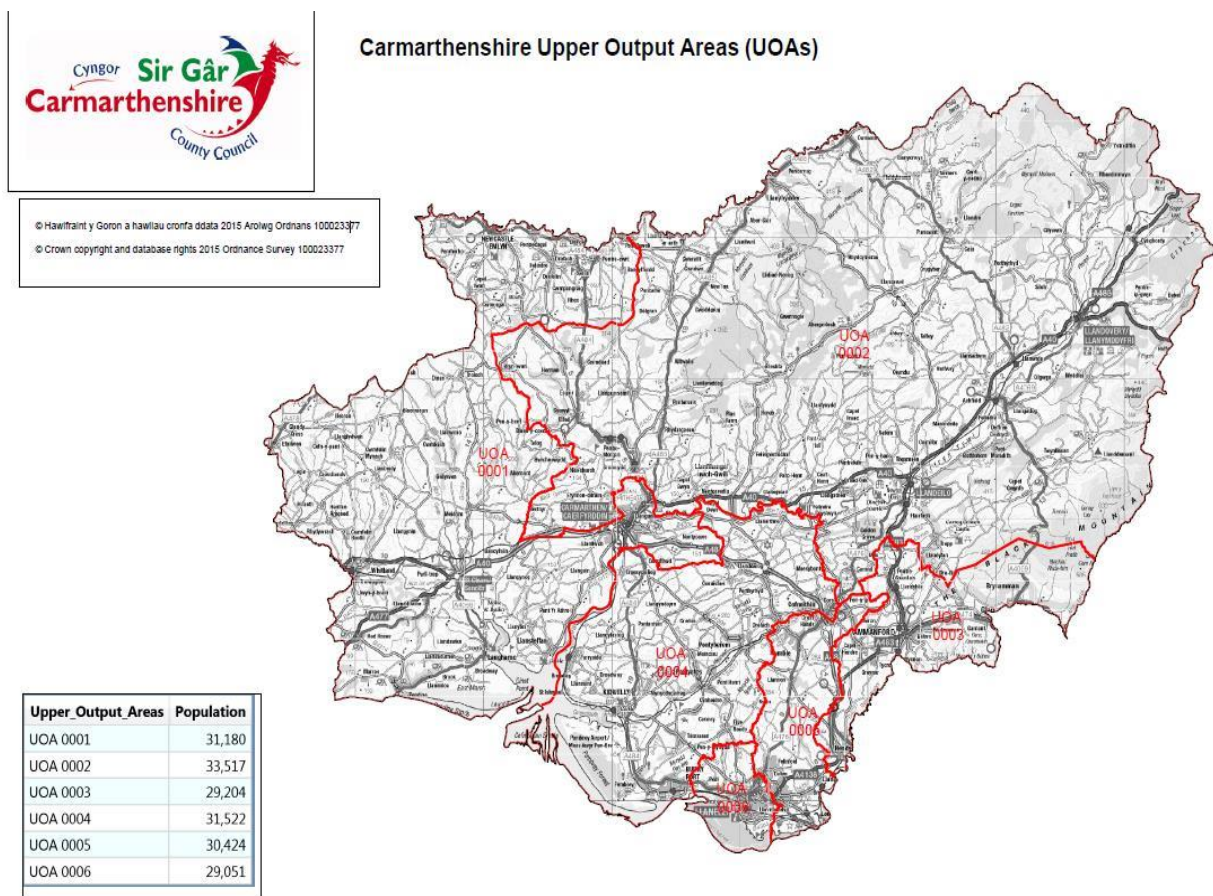
- Analysis of demographic and socio-economic data from the Office of National Statistics, HM Revenue and Customs, Stats Wales, Welsh Government and various Carmarthenshire County Council departments, to give an indication of the profile of factors affecting demand and the ability to pay for childcare in Carmarthenshire.
- Consultation with 821 local parent/carers via a questionnaire survey undertaken in October 2021 via the Welsh Government
- Consultation with Carmarthenshire's (a) full day care providers; (b) sessional providers; (c) registered childminders and; (d) out of school childcare providers in November 2021, to supplement analysis of Self-Assessment of Service Statement (SASS) data completed online by 88% of local registered childcare providers for CIW in June 2021
- Consultation with children and young people in partnership with colleagues undertaking the 2022 Carmarthenshire Play Sufficiency Assessment
- Consultation with local employers
- Consultation with local relevant partners, stakeholders and professionals
- Analysis of supplementary data derived from a range of additional sources including Care Inspectorate Wales (CIW)
- Analysis of Family Information Service data.

2.5 This CSA has provided an opportunity to determine the extent to which COVID-19 effects have been a factor in each of the Carmarthenshire locality's 112 LSOAs[1] - especially from the perspective of the acknowledged reduction in demand for formal childcare particularly for hours paid for by parents in 2020 and 2021. As in 2017, for the purposes of this assessment, six Carmarthenshire Community Areas have been identified and we call these Community Areas. Below is a breakdown of the wards and general LSOAs in each of the six Community Areas.

Community Area 1 (on map overleaf UOA0001)	Community Area 2 (on map overleaf UOA0002)
Carmarthen Town North	Abergwili
Carmarthen Town South	Carmarthen Town West
Cenarth	Cilycwm
Laugharne	Cynwyl Elfed
Llanboidy	Cynwyl Gaeo
Llangeler	Llandeilo
Llangunnor	Llandovery
Llansteffan	Llanegwad
St Clears	Llanfihangel Ar Arth
Trelech	Llanfihangel Aberbythych
Whitland	Llangadog
	Llanybydder
	Manordeilo & Salem

Community Area 3 (on map overleaf UOA0003)	Community Area 4 (on map overleaf UOA0004)
Ammanford	Burry Port
Betws	Glyn
Garnant	Gorslas
Glanamman	Kidwelly
Hendy	Llanddarog
Llandybie	Llangyndeyrn
Pontamman	Pembrey
Quarter Bach	Pontyberem
Saron	St. Ishmael
Tycroes	Trimsaran
	Burry Port

Community Area 5 (on map overleaf UOA0005)	Community Area 6 (on map overleaf UOA0006)
Bynea	Bigyn
Dafen	Elli
Felinfoel	Glanymor
Llangennech	Hengoed
Llannon	Lliedi
Llwynhendy	Tyisha
Penygroes	
Swiss Valley	
Bynea	

[1] LSOAs (Lower-layer Super Output Areas) are small areas designed to be of a similar population size, with an average of approximately 1,500 residents or 650 households. They were produced by the Office for National Statistics for the reporting of small area statistics.

Fig. 1 – Six Community Areas - UOAs

Carmarthenshire Upper Output Areas (UOAs)

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Upper_Output_Areas	Population
UOA 0001	31,180
UOA 0002	33,517
UOA 0003	29,204
UOA 0004	31,522
UOA 0005	30,424
UOA 0006	29,051

2.6   Essentially, the 2022 CSA has also been an opportunity to:

- Establish the views of local parents, carers and guardians on early years and childcare, particularly in relation to (their) future demand and specified need(s)
- Help ensure that local families are able to access childcare locally that meets their needs and enables them to progress their work-life and employability
- Determine the extent to which the COVID-19 pandemic affected: (a) the supply of early years and childcare; (b) the demand for formal childcare and; (c) the sustainability of existing early years and childcare providers
- Identify and action plan measures to pro-actively strengthen, enhance and increase Welsh-medium childcare provision
- Establish the extent to which nannies and alternative home childcare providers are actually employed within the Carmarthenshire locality.

2.7   Additionally, as context, the 2006 Childcare Act introduced a duty on local authorities in Wales to secure sufficient childcare in their area to enable parents to take up or remain in work or to undertake education and training in order to obtain work. It was directed that in determining whether the provision of childcare is sufficient to meet these requirements, Welsh local authorities must have regard to the provision of childcare involving the use of the Welsh language. This naturally required that local authorities to have a central role in the development of Welsh medium and bilingual childcare provision in their areas, in partnership with relevant organisations and that:

Local Authorities should identify and plan measures to strengthen and expand Welsh-medium childcare provision in the area to ensure a seamless route to Welsh-medium education and

ensure that the Family Information Service for parents/carers and prospective parents/carers provides information on the advantages of raising children bilingually and using Welsh in the family home.

In September 2021, figures published by StatsWales indicated that the Carmarthenshire locality has one of the highest percentages of its population having an ability to speak Welsh language (54.6% compared to the national average of 29.5%). Carmarthenshire County Council continues to be dedicated to supporting the ambition of raising further the ability of its population to have a proficiency in the Welsh language. Accordingly, it continues to work towards ensuring that there is indeed sufficient consideration at all levels where decisions are made about Welsh medium and bilingual childcare provision funding.

2.8 Finally, as context, the Carmarthenshire 2021 Assessment of Wellbeing outlines that from the perspective of childhood in the county:

- Children were impacted by not seeing their friends or extended families during COVID-19 lockdowns
- There has been an increase in children classified as 'children in need' by social services this is likely exacerbated by pressures exerted on families by the COVID-19 pandemic
- Almost a third of children resident in the county are living in poverty
- Parents and carers have identified that the cost of childcare can be prohibitive

That Assessment of Wellbeing incorporates a section on childcare provision and reflects on how the theme of childcare: *"has come to the forefront as some parents' needs have changed due to the impact of the pandemic. With more people now working from home, this could change the demand for and desired location of their childcare".*

3   POPULATION AND DEMOGRAPHICS

3.1 Carmarthenshire is the third largest county in Wales in geographical terms, covering some 2,370 square kilometres.

This 'sparsity' of population is more apparent in rural Carmarthenshire than it is in the south and east of the County.

A large proportion of Carmarthenshire's population still (as it did in 2017), resides in the three major towns of Llanelli, Carmarthen and Ammanford. These three locations are indeed witnessing a relative high incidence of new housing developments.

3.2 Essentially, the Carmarthenshire Local Development Plan (LDP) 2018-2033 outlines that the population of Carmarthenshire is estimated to grow by approximately 2.4% over the 2014–2039 projection period, an increase of 4,004 persons.

Supplementing this is a fact that three localities which will account for the highest forecast new housing yields up to 2026 i.e. the triangular geographical axis of:

- Llanelli locality – with 1,970 new dwelling yields forecast up to 2026
- Carmarthen locality – with 1,256 new dwelling yields forecast up to 2026
- Ammanford locality – with 562 new dwelling yields forecast up to 2026

3.3 The last comprehensive survey of the Welsh language published was the Census of population 2011. However, figures for the Census of 2021 are due to be published in 2022.

Essentially, in 2011, the proportion of Welsh speakers in Carmarthenshire (43.9%) was one of the highest in Wales. The number of Welsh speakers in Carmarthenshire was exceeded only by Gwynedd (65%), the Isle of Anglesey (57%) and Ceredigion (47%).

4   DEMAND FOR CHILDCARE

4.1   The October 2021 Welsh Government parental survey indicated that the three most frequent types of formal childcare being accessed by responding parents/carers in term-time were (in order of frequency):
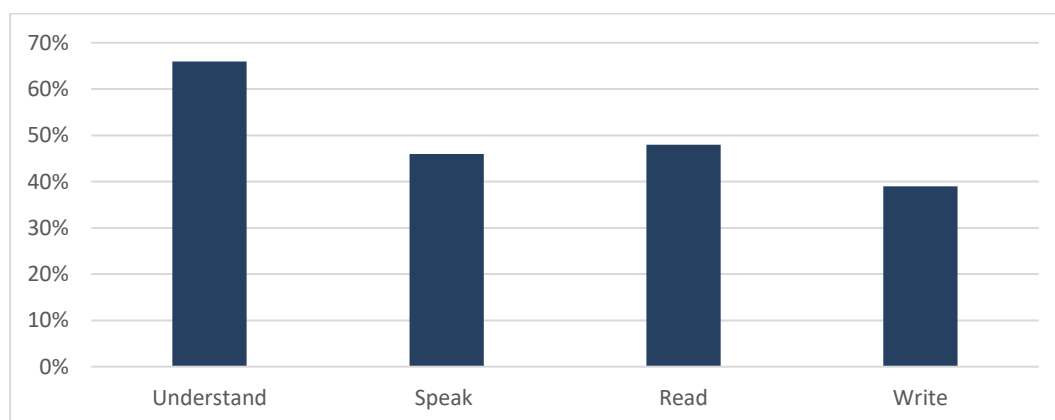
1. Before School/Breakfast Club
2. Private Day Nursery
3. After School Club

The two most frequent types of formal childcare being accessed by responding parents/carers in holiday times were (in order of frequency):

1. Private Day Nursery
2. Holiday Club or Playscheme

4.2   All responding parents/carers were invited to state whether they could speak, read and/or write the Welsh language.
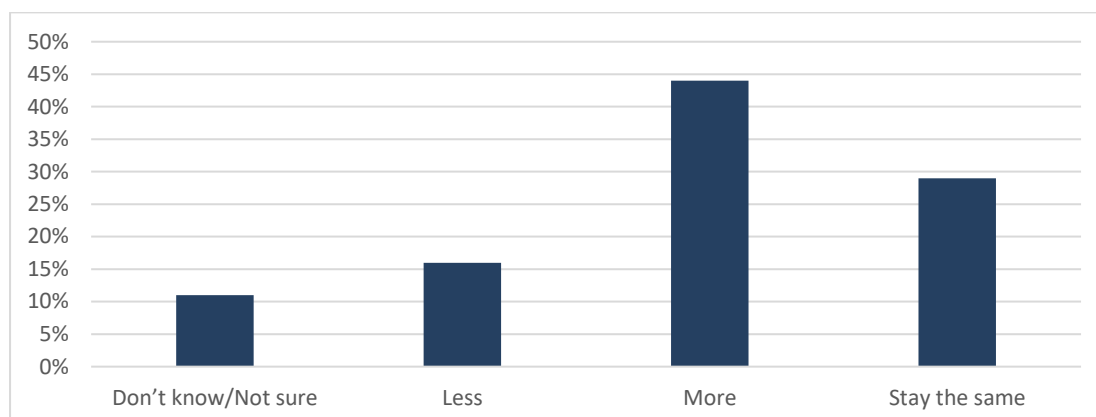
Fig. 2 - Incidence of proficiency in Welsh language

35% of responding parents/carers stated that they currently accessed childcare through the medium of Welsh, and these parents/carers were most frequently resident in the Ammanford and Gorslas areas. Of the 65% of respondents who stated No, (only) 4% stated that this was something they would ideally like to do.

4.3   An ultimate key response from parents/carers was to the question: Do you anticipate you will need more or less childcare in the next couple of years?

Those parents/carers who stated: More, were most frequently resident in the Gorslas LSOA (in the Dinefwr area), the St. Clears LSOA (in the Carmarthen area) and the Bynea LSOA (of the Llanelli area).

4.4   Vitally, it was observed that the three types of formal childcare that responding parents/carers stated that they intended to use 'more of' during term time were:

1. Breakfast/Before School Club – 62% of relevant parents
2. After School Club – 61% of relevant parents
3. Day Nursery – 37% of relevant parents

It can be noted that 27% stated a Cylch Meithrin. It can also be noted that 33% stated a Holiday Playscheme.

4.5   Each responding parent/carer was invited to state the numbers of hours they used childcare for, on average, on a typical week. Of those parents who responded to the question:

For term-time:
The most frequently stated amount of hours was 30/week, followed in frequency by 20 hours/week.

For holiday-time:
The most frequently stated amount of hours was also 30/week, followed in frequency by 40 hours/week.

4.6   As part of the research for the 2022 Childcare Sufficiency Assessment, all responding Carmarthenshire-locality based employers were invited to state whether during the COVID-19 pandemic they had seen a change in the way that their employees access flexible working arrangements. Two-thirds stated that they had done so – and the changes that they had seen included:

- An increased demand for more flexibility around school start and finish times
- A general increase in flexible working requests
- A general increase in requests to work from home

5   SUPPLY OF CHILDCARE

5.1   Table A indicates the supply of the four main types of registered childcare as presented in the 2017 Childcare Sufficiency Assessment.

Table A - Registered Providers by type and places 2016-2017

Setting type	Registered providers	Registered places
Childminders	113 (55)	735 (295)
Full day care	35 (17)	1,314 (630)
Sessional care	52 (51)	955 (935)
Out of school care	42 (24)	1,161 (653)
Total	**242**	**4,165**

5.2   In comparison, Table B shows the fundamental supply of registered childcare places in the county in June 2021.

Table B - Registered Providers by type and places June 2021

Setting type	Registered providers	Registered places
Childminders	103 (37)	787 (269)
Full day care	38 (10)	1,462 (405)
Sessional care	64 (58)	1,186 (1,091)
Out of school care	44 (25)	1,337 (824)
Total	**249 (130)**	**4,772 (2589)**

(The figures above in red on both Tables denote existing Welsh Medium childcare providers and childcare places by setting type).

Essentially, in 2021, Carmarthenshire had 15.5 registered childcare places for every 100 children aged 0-14 years old – an increase from 14 for every 100 in 2017. Indeed, the actual number of places has increased for all four types of registered childcare.

5.3   In terms of specific type of childcare provision:

CHILDMINDERS
Between 2017 and June 2021, there was a decrease of registered childminders from 113 to 103. However, this was compensated with an increase from 735 to 787 registered childcare places. This is an increase of 6.7% since the 2017 Childcare Sufficiency Assessment.

Childminders provide 17% of all registered childcare places with the County.

There are 35 childminders who have Dewis records of which nine have stipulated that they do/can offer weekend service. 1 childminder has also stipulated that she can provide overnight care.

Carmarthenshire County Council's autumn 2021 survey with childcare providers ascertained that an average day rate charged by childminders in the county was £37.50.

FULL DAY CARE
Between 2017 and June 2021 the number of day nurseries/full day care providers in the county had increased from 35 to 38. Likewise, the total number of registered childcare places has increased by 148 places, to 1,462.

Day nurseries provide 30.5% of all registered childcare provision in the County with the greatest level of provision in the more urbanised areas of Carmarthen and Llanelli.

Carmarthenshire County Council's autumn 2021 survey with childcare providers ascertained that an average day rate charged by full day care providers in the county was £45.00.

SESSIONAL CARE
Between 2017 and June 2021 the number of sessional care settings had increased from 52 registered settings to 64. Likewise, the total number of registered childcare places had increased from 955 to 1186 registered places. Sessional Care settings are identified as Cylchoedd Meithrin or Playgroups and can be registered as sessional or Full Day Care with CIW.

The June 2021 SASS responses indicated that the average rate charged per session was £10.68.

CRÈCHE
In June 2021 in Carmarthenshire there were no registered creche facilities.

OUT OF SCHOOL CHILDCARE
In October 2016 there were 42 registered out of school care settings offering 1,161 registered childcare places across the county. In June 2021, the number of registered settings had increased to 44 and the number of registered places had increased by 174 places.

Registered out of school childcare settings can also offer three elements of care: before school care, after school care and holiday care. Some of the day nurseries also provide a combination of out of school facilities.

In 2021 out of school care settings provide 28% of all registered childcare places within the County.

Carmarthenshire County Council's autumn 2021 survey with out of school childcare providers also provided confirmation that the:

- Average sessional rate for places at an out of school club was £7.10
- Average sessional rate for places at a breakfast club was £2.70
- Average sessional rate for places at a holiday club was £20.10

OPEN ACCESS PLAY PROVISION (UNREGISTERED)

Open Access Play provision can be permanent or short-term provision, located in a variety of settings with or without premises including play centres, adventure playgrounds, playschemes and parks. Whilst the term Open Access applies to registered provision for children under eight years, such provision usually caters for a wide age range of children, including those over seven years.

Open Access Play Provision still operates in all three Integrated Children's Centres:

1/ Llwynhendy Open Access Play for 7-11 year olds
2/ Morfa Open Access Play session for 4-6 year olds (must be accompanied by a parent) and 7-11 year olds
3/ Felinfoel Open Access Play for 4-6 year olds (must be accompanied by a parent) and 7-11 year olds.

NANNY

In June 2021 there were three nannies registered on the CIW voluntary approval scheme.

BREAKFAST CLUB PROVISION

In September 2021 there was one nursery school and 95 infant and primary schools throughout Carmarthenshire. All of these were operating a free breakfast club. The county also had two fee paying breakfast/care clubs: Ysgol Teilo Sant and Ysgol y Dderwen.
Opening times of the free breakfast clubs and fee paying breakfast clubs vary with fee paying clubs opening earlier.

FREE NURSERY EDUCATION, CHILDCARE OFFER AND FLYING START PROVISION

5.4   There are three main types of funded early years provision in Wales.

- Early years education is a non-statutory provision available to 3 year olds for 10 hours a week (term-time) at an approved registered childcare setting. This provision be accessed as part of the Childcare Offer. (Part time 3 year old education of 10 or 12.5 hours can also be accessed within 3-11 schools).

- The Childcare Offer for Wales provides up to 30 hours of government funded early education and childcare to 3 and 4 year olds, for 48 weeks per year at a CIW registered childcare setting who has agreed participation. Parents can choose their own childcare provider that meets their child's needs.

- The Flying Start programme helps families with children under 4 years old in disadvantaged areas of Wales. The support available includes part-time childcare for 2 to 3 year olds (12.5 hours per week, 42 weeks of the year).

Part-time Early years Education for 3 year olds and the Childcare Offer Provision

For children who are unable to access part time education within 4-11 schools, approved non maintained settings can offer children access to early education following the Curriculum for Wales.

Whilst access to the early education element of the Childcare Offer is universal, access to the childcare element is only available to eligible working parents. In early 2022, Welsh Government announced that as from September 2022 they will be extending the Offer to enable parents who are in education and training to also benefit from the additional hours of funded childcare it provides.

The extension of the Offer will focus initially on parents who are enrolled on higher and further education courses. Once this change has been implemented, the Welsh Government will include additional cohorts of learners over time. This could include those in adult learning, work based learning, community learning and also those undertaking more short-term learning, including ESOL courses. Additionally, from the 1st April 2022, the Childcare Offer will be extended to enable eligible parents who are on adoption leave to access the Offer for the child who is the subject of the adoption, provided this in line with their Adoption Support Plan.

5.5   In autumn 2021, 80% of representatives of early years childcare providers/settings, i.e. full day care providers and sessional providers stated that they offered Childcare Offer places for 3-4 year olds, at an average of 8 places/setting. (This compared with 84% of respondents who stated the same as an outcome of the SASS research in June 2021). Of these settings, 29% stated that they were experiencing vacant places and 15% stated that they had observed changes in terms of parent's/carer's uptake of Childcare Offer places since the start of the pandemic, which repeatedly was (words to the effect) *"we have places available, but there has been a reduction in demand"*.

87% of registered childminders, stated that they offered Childcare Offer places for 3-4 year olds, at an average of 2 places/childminder. 54% stated that they were experiencing vacant places and 16% stated that they had observed changes in terms of parent's/carer's uptake of Childcare Offer places since the start of the pandemic, which repeatedly was (again, words to the effect) *"I have places available, but there has been a reduction in demand"*.

Flying Start Childcare Provision

5.6   From September 2022, the number of Flying Start target areas in every local authority area in Wales, including Carmarthenshire will be expanded meaning all children under four living in these areas will be able to access Flying Start services, including childcare for those aged two to three. Eligible families will be notified by their local Flying Start team by the summer. Once the Flying Start scheme has been fully rolled out, all families in Wales with children aged two to three years will be eligible for 12.5 hours of funded, high-quality childcare for 39 weeks of the year. Plans for the larger expansion of Childcare will be announced in the autumn.
To meet this target, existing Flying Start childcare providers in Carmarthenshire will be supported to expand their reach, with work ongoing to encourage new providers, including those who specialise in Welsh-medium provision, to offer this provision.

The June 2021 SASS responses indicated that 17% (33) of the (191) responding childcare providers received funding to deliver Flying Start programme childcare places.

5.7   Table C below shows the number of Flying Start childcare places evidently available in March 2022 aligned to each of the relevant LSOAs. It also depicts the commissioning arrangements aligned to the maximum number of English and Welsh places at each commissioned setting. We have taken the decision to show these figures for March 2022 as this relates to the Flying Start programme itself and having undertaken a commissioning exercise in September 2021

securing places up until 2028.

Table C - Number of Flying Start childcare places evidently available in March 2022

| Name of setting including postcode | LSOA | | | Provider type | | | Max Number of FS places | | Confirm CIW Registered |
	Name	Number	Postcode	LA	voluntary	Private	English	Welsh	
Argel Family Centre	Carmarthen Town South 2	W01000642	SA31 3NQ	√			8		√
Andi Pandis	Pontamman 1	W01000714	SA18 2DB			√	30		√
Little Wizards	Carmarthen Town North	W01000637	SA31 1TE	√			16		√
Ffrindiau Bach	Trimsaran 1	W01000729	SA17 4BE	√				20 am 20 pm	√
Trysor Bach	Betws	W01000627	SA18 2HE	√				14 am 14 pm	√
Sêr Ni'	Llwynhendy 3	W01000708	SA14 9DP	√			20 am	20 yp	√
Tedi Bach	Glanymor 2	W01000660	SA15 2NG		√		20 am 20 pm		√
St Paul's Family Centre	Tyisha 2	W01000733	SA15 1DN		√		16		√
Cylch Meithrin Felinfoel	Felinfoel	W01000655	SA14 8BE		√			24	√
Jellitotz	Glanymor 3	W01001923	SA15 2AP		√		20 am 20 pm		√
Cylch Meithrin Carwe	Llangyndeyrn 1	W01000695	SA17 4HE		√			8	√
Cylch Ysgol Y Bedol	Garnant	W01000656	SA18 2GB		√			28	√
Cylch Meithrin Parcyrhun	Ammanford 1	W01000625	SA18 3HB		√			8	√
Little Towy Toddlers	Carmarthen Town South	W01000641	SA31 1NB	√			10 am 10 pm		√
Ser Ni Bynea	Bynea 1	W01000635	SA14 9LT	√			16 am 16 pm		√
Myrtle House	Bigyn 2	W01000629	SA15 1LH			√	20		√
Childsplay	Tyisha 3	W01000734	SA15 1AU			√	20		√
Once Upon a Time	Tyisha 1	W01000732	SA15 2RH			√	10		√
High Flyers	Dafen 2	W01000652	SA14 8LL			√	10 am 10 pm		√
Little Lighthouse	Pembrey 1	W01000710	SA16 0AU	√			10 am 10 pm		√
Serendipity Dechrau'n Deg	Pembrey 2	W01000711	SA16 0TP			√	10		√
Ffrindiau'r Harbwr	Pembrey 1	W06000010	SA16 0AU	√				19 am 19 pm	√
Brambly Hill	Dafen 2	W01000652	SA14 8QF			√	0		√
Camau Tirion	Bynea 2	W01000636	SA14 9ET			√		0*	√

Name of setting including postcode	LSOA			Provider type			Max Number of FS places		Confirm CIW Registered
	Name	Number	Postcode	LA	voluntary	Private	English	Welsh	
Eco Tywi	Carmarthen Town South 1	W02000149	SA311LR		√			0*	√
Pobl Bach	Llangunnor 2	W01000694	SA31 2BL			√		0*	√
Serendipity Nursery	Pembrey 2	W01000711	SA16 0TP			√	0*		√
Camau Tirion Heol Goffa	Lliedi 3	W01000705	SA15 3EJ			√	0*		√
							322	194	

* Additional Flying Start places are available if required

The Table indicates how the maximum number of places accessible in English and Welsh in early spring 2022 was 516, which compares to 412 at the time of the 2017 Childcare Sufficiency Assessment.

6   CHILDCARE BARRIERS & GAPS IDENTIFIED

6.1   The October 2021 Welsh Government parent/carer survey invited its target audience to state whether in the past year, issues surrounding childcare had affected themselves or a[ny] partner:

- 49% stated that the issue of childcare had: caused problems at work
- 19.5% stated that the issue of childcare had: prevented continuation of work
- 19% stated that the issue of childcare had: stopped them from working/getting a job
- 13% stated that the issue of childcare had: stopped them from accessing training

6.2   The October 2021 Welsh Government parent/carer survey also invited its target audience to give feedback about any barriers that they had encountered with regard to them accessing childcare of their choice. The collective feedback of the parents/carers is summarised in Table D below.

Reasons	Percentage of relevant responding parents/carers
Child is on a waiting list for a place to be available	2%
There is no childcare with sufficient quality	1.5%
There is no suitable Welsh Language provision	1%
No suitable provision in our language not English/Welsh	0.5%
The childcare available is not flexible enough for my needs	7.5%
The cost of childcare is too expensive	19%
Childcare times are unsuitable	5%
There is no childcare available that is suitable for my child's age	5.5%
There is a problem with transport	2%
There is no childcare where I need it to be	5.5%

There is no childcare that can cater for my child's specific needs	1.5%
I only use childcare on an ad hoc basis and it is impossible to plan	4%

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

Table D indicates that when a barrier was highlighted it was only ever, at most, stated by approximately 1:5 parents or carers.

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

1. The cost of childcare is too expensive (stated by 18.5% relevant parents)
2. The childcare available is not flexible enough to meet my needs (7.5%)
3. There is no childcare available that is suitable for my child's age (5.5%)

The three most frequent barriers stated by parents who were wishing to access employment of training were:

1. The cost of childcare is too expensive (stated by 26% relevant parents)
2. There is no childcare where I need it to be (20%)
3. Childcare times are unsuitable (11%)

6.3 In late 2021 and early 2022, Carmarthenshire County Council organised and facilitated a series of e-focus group sessions with parents and carers who were resident throughout the locality, which focused on the theme of accessibility of childcare and parental priorities.

In terms of the themes of **barriers to childcare**, carers who attended the e-focus group session that addressed the needs of their ALN children provided valued feedback including:

- The fact that a lack of childcare provision had affected their employment decisions
- That out of school childcare options had been causing challenges most frequently, post the COVID-19 pandemic
- They would like more awareness of what was *"meant"* by Tax Free Childcare and how they might qualify.

In terms of the themes of **barriers to childcare**, parents and carers who were resident in Flying Start aligned localities provided, again, valued feedback including:

- That the issue of rural poverty should continue to be considered by those involved with the planning of childcare
- How important it was that the Flying Start programme afforded them the chance to meet other parents and families and benefit from networking, in particular in order to mitigate a potential 'information barrier'.

6.4 The Tables below summarise the **number of registered childcare providers and places** available within each Community Area (1-6), aligned to the type(s) of broad registered childcare.

Table E - Community Area 1 number of providers and places

	Childminders	Full day care	Sessional care	Out of School Childcare

Total Providers	22	10	15	12
Total Registered Places	207	296	244	456

Table F - Community Area 2 number of providers and places

	Childminders	Full day care	Sessional care	Out of School Childcare
Total Providers	17	6	17	7
Total Registered Places	126	185	252	296

Table G - Community Area 3 number of providers and places

	Childminders	Full day care	Sessional care	Out of School Childcare
Total Providers	13	2	5	9
Total Registered Places	98	134	149	241

Table H - Community Area 4 number of providers and places

	Childminders	Full day care	Sessional care	Out of School Childcare
Total Providers	19	10	12	4
Total Registered Places	151	313	246	64

Table I - Community Area 5 number of providers and places

	Childminders	Full day care	Sessional care	Out of School Childcare
Total Providers	21	3	9	9
Total Registered Places	119	151	171	214

Table J - Community Area 6 number of providers and places

	Childminders	Full day care	Sessional care	Out of School Childcare
Total Providers	11	7	6	3
Total Registered Places	86	383	124	66

The Tables above indicates that:

Childminders
Community Area 1 accounted for the highest number of childminder places.
Community Area 6 accounted for the lowest number of childminder places.

Full Day Care
Community Area 6 accounted in June 2021 for the highest number of full day care places.
Community Area 3 accounted for the lowest number of full day care providers places.

Sessional Care
Community Area 2 accounted in June 2021 for the highest number of sessional day care places.
Community Area 6 accounted for the lowest number of sessional day care places.

Out of School Care
Community Area 1 accounted in June 2021 for the highest number of out of school childcare places.
Community Area 4 accounted for the lowest number of out of school childcare places.

6.5 The research undertaken to inform this 2022 Childcare Sufficiency Assessment has provided the following evidence:

- The number of registered childcare providers and places accessible in the County have both increased since 2017. There has also been an increase in our resident number of 0-14 year olds since our last assessment.

- The Local Authority knows that the population of Carmarthenshire has been forecast to *increase* by 2.4% up to 2028 and this could result in approximately 220 more resident 0-4 year olds by 2027and 520 more resident 5-14 year olds by 2027.

- Community Area 3 has the lowest number of registered childcare providers and in particular full day care. The Ammanford locality is set to account for buoyant new housing developments up to 2026, with 562 new dwellings set to be built. This is likely to increase demand for childcare in Community Area 3.

- Community Area 5 has a relatively high population of 0–4-year-olds, however a relatively low number of full day care places. This could cause sufficiency pressures when the universal offer for 2 year olds and extension of Childcare Offer for 3 and 4 year olds gains momentum. It is also a factor that 1,970 new housing developments are planned for the Llanelli locality up to 2026, which could, once again, cause additional pressure for formal registered childcare places.

- Community Area 6 also has a relatively high population of 0-4 year olds, however it has three LSOAs located within its boundary where there are no registered childcare places located: Bigyn 4; Glanymor 1 and; Hengoed 2. To an extent, this is offset by the Community Area having the highest incidence of full day care places – however, it has the lowest quantity of places with registered childminders and one of the lowest quantity of places with registered out of school childcare providers. It will need to be an area of sufficiency focus. It can also be noted that the Bigyn locality accounted for a relatively high birth rate, prior to the 2020 start of the COVID-19 pandemic and also features within the top 100 areas of relative deprivation in Wales. The Glanymor locality also features in the top 20% areas for childhood poverty for Wales.

- The numbers of registered childminders operating in the county has fallen since the 2017 Childcare Sufficiency Assessment. This could cause sufficiency pressures aligned to an evident increase in demand for flexible hours, families working shift and atypical hours and families looking for care for children with additional learning needs.

7   SUSTAINABILITY AND COVID-19

7.1   As part of Carmarthenshire County Council's survey with childcare providers in autumn 2021, each setting was invited to state if their business experienced (or continues to experience) issues as an outcome of COVID-19.

Fig. 4 - Incidence of issues being experienced by setting/group-based providers as an outcome of COVID-19
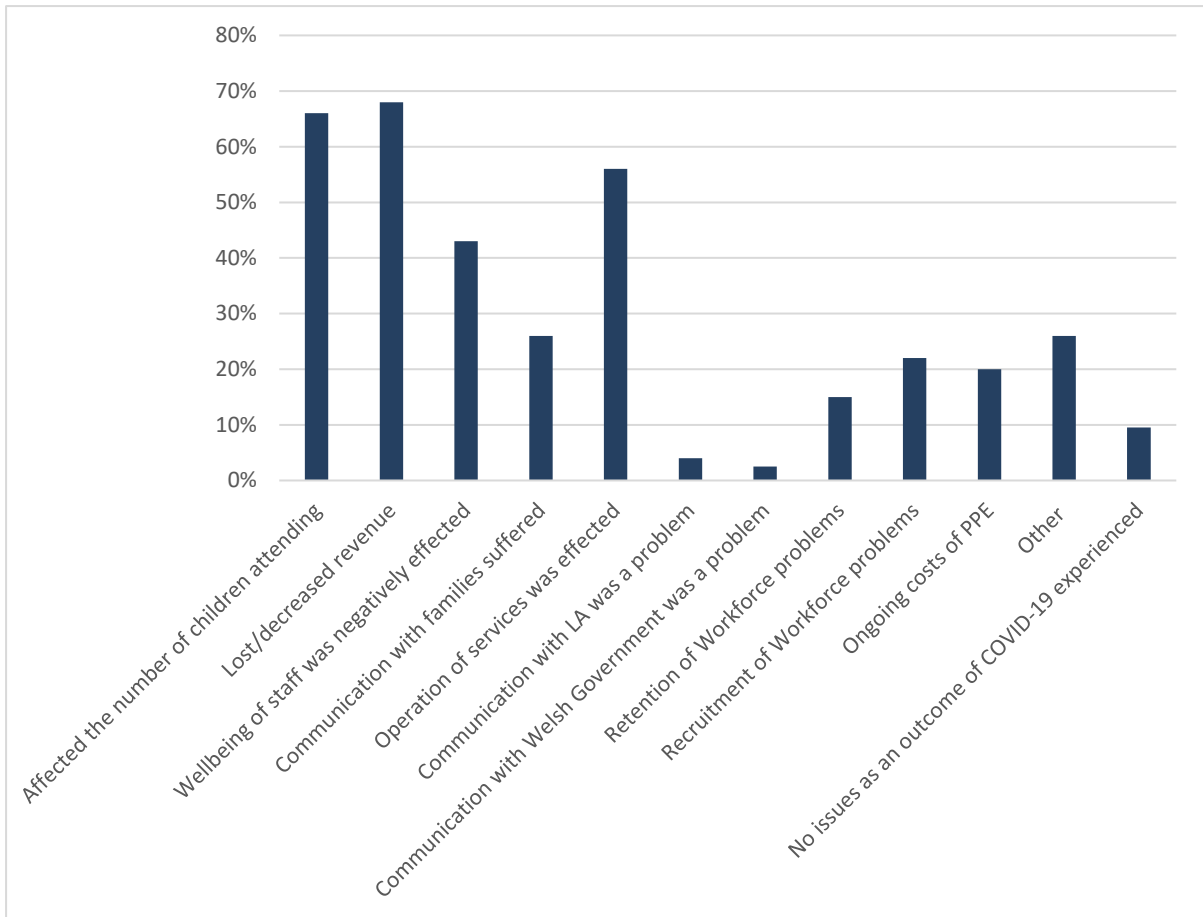

Fig. 4 shows early years childcare and out of school childcare providers/settings collective feedback about the incidence of any issues or challenges experienced as an outcome of COVID-19.

The location that accounted for the highest incidence of a provider stating 'lost/decreased revenue' was the Llanelli area. The location that accounted for the highest incidence of a provider stating 'affected the number of children' was also the Llanelli area.

Fig. 5 - Incidence of issues being experienced by registered childminders as an outcome of COVID-19
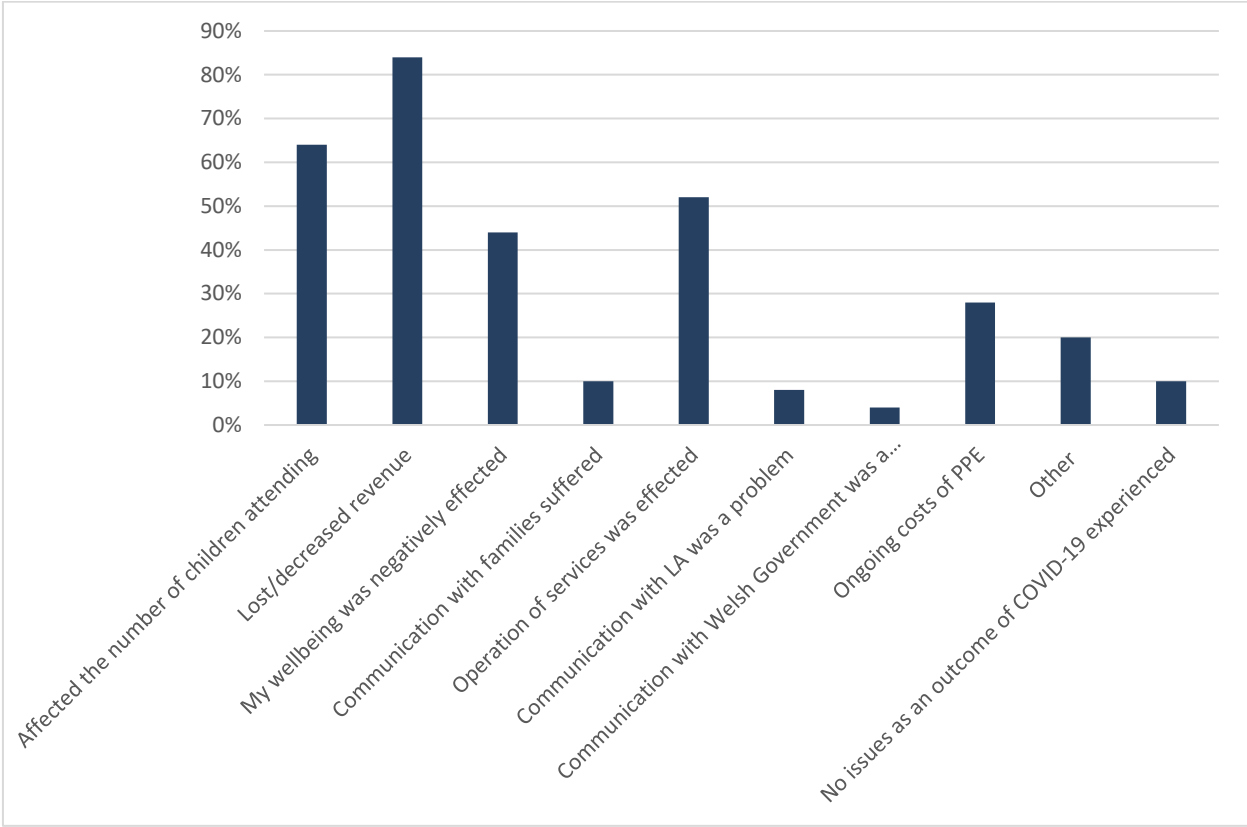

Fig. 5 shows registered childminders most frequently outlined how they had 'lost/decreased revenue' as an outcome of the COVID-19 pandemic, and these relevant respondents were most frequently resident in the Dinefwr area. The location that accounted for the highest incidence of a childminder stating 'affected the number of children' was also the Llanelli area.

7.2   In autumn 2021, all childcare providers were invited to confirm a length of time aligned to how long they expected to continue to be providing childcare:

Fig. 6 - Responses from: (a) early years childcare providers and (b) out of school childcare providers on length of time they expected to continue in business
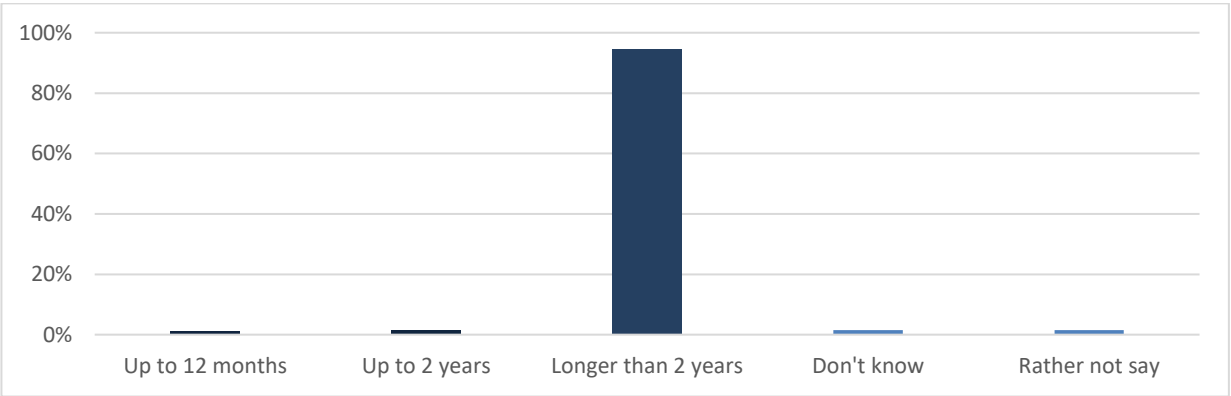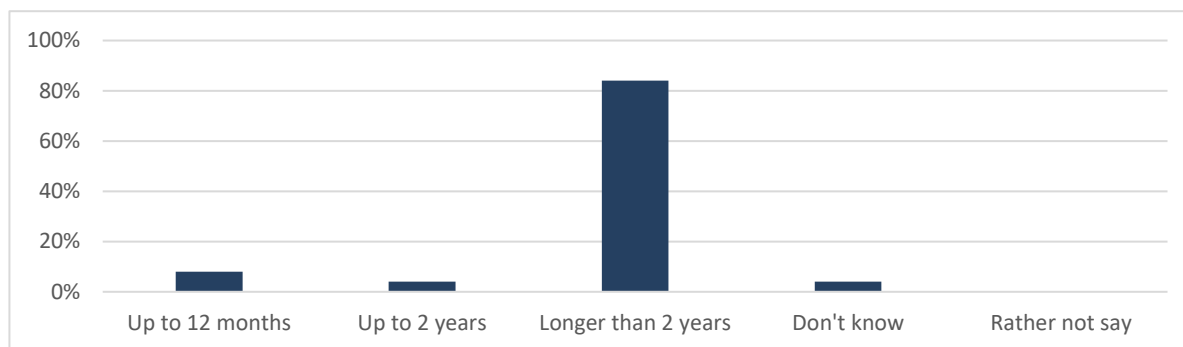
Fig. 7 - Responses from registered childminders on the length of time they expected to continue in business

Those six childminders who stated less than 2 years most frequently lived in the Llanelli area.

7.3 Essentially, all (representatives of) Carmarthenshire-based childcare providers were invited to state what their setting would most welcome as continued support, advice and guidance from Carmarthenshire County Council over the forthcoming year 2022. The three repeated types of feedback were (in order of frequency):

- Keeping providers aware about (sustainability) grants
- Advice and support aligned to ALN children and transitions to schools
- Help with staff recruitment

8   CONCLUSION

Since our last full Childcare Sufficiency Assessment (2017-2022) the number of childcare places and providers has increased and remained fairly stable despite the challenges of the COVID-19 pandemic.

Analysis of various demographic and socio-economic data, the roll out of the universal offer of part time childcare for all 2 year olds, and the extension of the Childcare Offer for 3 and 4 year olds (for parents on adoption leave and in further education and training) would all appear to suggest that there will be an increased demand for part-time registered childcare for 2, 3 and 4 year olds over the next five years. Community areas 3,5 and 6 will need to be prioritised as we anticipate there will be sufficiency pressures in these areas.

We know from the October 2021 Welsh Government parent/carers survey that parents anticipate needing to use more out of school childcare in forthcoming years. Community area 4 will need to be prioritised as there could be out of school childcare sufficiency pressures in this area.

Additionally, a number of childminders have de-registered since our last Assessment and we will need to recruit, train and support prospective childminders to fill theses gaps, with a particular focus on community area 6 and in rural areas of the County where other provision may not be sustainable due to low demand.

Affordability of childcare for those families that cannot access funded childcare continues to be a significant issue. It is likely that this will remain an issue as the cost of living continues to increase and childcare providers will unfortunately have to pass these costs on to families in order to remain sustainable. We anticipate that most childcare providers will need to increase fees in April 2022 as a result of this.

Childcare is acting as a barrier to certain parent's employability and is not sufficient for some of these parent's needs, particularly parents who are working (on an increasingly evident basis) shift hours. The extension of the Childcare Offer for 3 and 4 year olds for parents/carers in further education and training should help alleviate this, but the extent is currently unknown.

Childcare opening times are not sufficient to meet the needs of certain working parents, in particular the opening times of some breakfast clubs.

The incidence of children with additional learning needs attending childcare provision is increasing. Childcare providers will need to be supported with training, resources and equipment to ensure that they can meet the additional learning needs for the children in their care.

The incidence of parents requesting greater flexibility within their childcare provision is increasing - including aligned to (COVID-initiated) modifying work patterns and routines, and in 2022 there is not currently sufficient flexibility in response from Carmarthenshire's childcare providers.

The sufficiency of childcare in the Carmarthenshire locality may be affected in the forthcoming years by issues with childcare and early years workforce recruitment and retention. 23% of settings/groups stated staff had left their workforce because of the pandemic, which was indicative of a theme that is becoming evident throughout Wales: that retention and recruitment is proving to be a growing (as of spring 2022) challenge. Indeed, at the opposite end of the 'pipeline' it can observed that as outcome of that same autumn 2021 consultation with early years childcare providers, the majority, 70% stated that they had no plans, in late 2021 to recruit any apprentices. During the pandemic many childcare providers faced intermittent closures and significant loss of income. We have witnessed qualified childcare staff leaving the sector due to pandemic fatigue, poor pay, terms, and conditions and feeling undervalued. We know that some staff have left to take up jobs in schools and the NHS where pay, and conditions are more favourable, and working hours fit much better with balancing family commitments. Mental health and wellbeing concerns have also been cited as reasons for staff exiting the sector.

9   RECOMMENDATIONS

This report makes the following 23 recommendations to address current anticipated demand and supply gaps across the county of Carmarthenshire.

CHILDCARE DEMAND

Recommendation 1

The Local Authority needs to continue to monitor the incidence of new housing development completions during 2022-23 and the forthcoming years, in particular, relevant (major development) localities such as West Carmarthen, the Dafen East Gateway and the Maes Ar Ddafen Road Development, as this is likely to stimulate an increased demand for childcare in these areas.

Recommendation 2

The Local Authority needs to encourage, advise and support existing childcare providers to adapt their business planning/model to meet the changing demand from parents/families in terms of when they prefer to access childcare places including on a flexible/part time basis.

Recommendation 3

The Local Authority needs to continue to closely monitor enquiries from parents/carers via the Family Information Service in relation to childcare needs and assess the demand for childcare outside 8am – 6pm, weekends, holidays and atypical hours. The Local Authority needs to continue to ensure that this information feeds into the annual Childcare Sufficiency Assessment planning process.

CHILDCARE SUPPLY

Recommendation 4

The Local Authority needs to begin to strategically plan the phased roll out of universal offer of part time funded childcare for all 2 year olds as part of the Flying Start expansion (Summer 2022). Community Area 3,5 and 6 have been identified as areas where there is likely to be insufficient childcare places available to meet the increased anticipated demand.

Recommendation 5

The Local Authority needs to monitor the availability and supply of childcare places for 3 and 4 year olds across the County to enable the successful extension of the Childcare Offer for parents on adoption leave and in further education and training.

Recommendation 6

The Local Authority needs to continue to use the Childcare Sufficiency Assessment as a reference tool for signposting potential new childcare providers when they make contact with the Local Authority/Family Information Service/Care Inspectorate Wales.

Recommendation 7

The Local Authority and its partners need to continue to be mindful that the type of childcare that parents most frequently envisage that they will wish to access in forthcoming years 2022-24 is out of school childcare. The Local Authority also need to be mindful that a relatively high number of such provisions are school based. Space in schools to accommodate this provision has been raised as an issue in certain schools and by certain parents.

Recommendation 8

The Local Authority needs to continue to offer 'start up' grants to new childcare providers who are wanting to set up in areas highlighted within the County where there is going to be an increased demand for childcare.

Recommendation 9

The Local Authority needs to continue to support, maintain and enhance existing registered childcare provision within the county (Childminders, Full Day Care, Sessional Care and Out of school Care) and promote and support possible expansion opportunities.

Recommendation 10

The Local Authority needs to continue to promote and publicise childminding as a career opportunity, in order to recruit additional childminders in areas where there has been a decline, and in rural areas where other registered childcare provision may not be sustainable. Community Area 6 is a priority area.

Recommendation 11

The Local Authority needs to continue to fund Introduction to Home-based Care training and Quality Start packs for new childminders.

AVAILABILITY/FLEXIBILITY

Recommendation 12

The Local Authority needs to consider how it can encourage childcare providers to offer more flexible opening and closing times that will accommodate changes in working patterns.

AFFORDABILITY

Recommendation 13

The Local Authority needs to continue to lead on promoting an awareness among parents and providers of the availability of Tax Free Childcare, as a source of financial support. It should naturally also prepare to communicate and disseminate information about the forthcoming: (a) the extension of the Childcare Offer for three and four year olds for parents on adoption leave and in further education and training and: (b) the universal offer of funded childcare for all two-year-olds within the next three years, given how logical it is that these two initiatives will benefit specific (and in the case of (a), newly eligible) families.

Recommendation 14

The Local Authority needs to continue to work in partnership with local employability programmes and professionals, such as DWP, in order to advise on promotion of funded childcare initiatives and programmes such as Tax Free Childcare.

SUSTAINABILITY

Recommendation 15

The Local Authority needs to continue to closely monitor the impact of the Pandemic on all local childcare providers and put mechanisms in place early on to ensure sustainability of provision. The Local Authority should continue using a Red/Amber/Green (RAG) rated support framework across all registered childcare settings i.e. full day care, out of school care and sessional care to determine level of support required by each individual setting, to ensure that settings have the best possible chance of remaining sustainable, and that any issues identified are raised early.

Recommendation 16

The Local Authority needs to continue to offer sustainability/hardship grants to registered childcare providers who are struggling to sustain their businesses.

INFORMATION

Recommendation 17

The Local Authority needs to maintain the high profile and vital role of the Family Information Service - in particular because of its work in promoting funded childcare offers and support, its role in directing parents/families to quality childcare and its essential role in sign-posting parents to Welsh-medium provision. It should also continue to focus on how it can promote its role to local employers - as well as their employees.

WORKFORCE DEVELOPMENT RECRUITMENT AND RETENTION AND CONTINUING PROFESSIONAL DEVELOPMENT

Recommendation 18

The Local Authority needs to take an amplified lead on addressing childcare workforce recruitment and retention challenges. A collaborative approach will be required working with local colleges, CWLWM partners, Careers Wales, Social Care Wales etc to maximise opportunities and help build and strengthen the workforce.

Recommendation 19

The Local Authority needs to continue to ensure that the local childcare workforce continue to have access to appropriate subsidised mandatory training courses to fulfil Care Inspectorate

Wales requirements and further enhance continuing professional development opportunities.

Recommendation 20

The Local Authority needs to continue to promote and provide opportunities for the local childcare workforce to develop skills to work in Welsh medium and bilingual childcare settings and provide Welsh language opportunities for children in English medium childcare settings.

Recommendation 21

The Local Authority needs to continue to improve qualifications levels of staff working in local childcare settings in order to further raise standards and quality of provision. The Local Authority needs to continue to promote Welsh Government funded work based learning opportunities, and encourage and monitor take up of places.

ADDITIONAL LEARNING NEEDS

Recommendation 22

The Local Authority needs to remain aware that the incidence of children having additional learning needs has increased, where childcare providers have provided feedback about a tangible incidence of developmental delays and regressions. The continued promotion of the Additional Learning Needs Transformation Programme should be an ongoing priority. The Local Authority will need to continue to support Childcare Providers to access appropriate training, resources and equipment to meet the additional learning needs of children for whom they are providing care.

WELSH MEDIUM PROVISION

Recommendation 23

The local authority needs to continue to be progressive in its thinking with regard to Welsh-medium childcare and ensure that all opportunities to broaden its availability are seized with energy and in partnership with its WESP and childcare partners. This will be particularly important when starting to plan the phased roll out of the universal offer of part time funded childcare for all 2 year olds where there is a strong Welsh medium focus.