

Cardiff Council

Childcare Sufficiency Assessment 2022 – 2027

Draft for consultation

Executive Summary

Introduction and context

The approach taken in conducting this assessment has been based on meeting the requirements of

- the statutory guidance document *Childcare Statutory Guidance* (2016) and
- the circular letter WGC 003 2021/WG21-28 “*Childcare Statutory Guidance (2016): Securing Sufficient Childcare and Child Sufficiency Assessments*” issued on March 15th, 2021

The guidance requires local authorities to undertake:

- Mapping of the current provision of childcare, taking into account:
 - the type of registration and the services provided
 - the age range catered for
 - the times of operation
 - the language of provision
 - the location
 - fee levels
 - ability to provide inclusive provision
 - any additional services/facilities provided.
- Mapping of current attendance patterns, along with the level of vacancies or children waiting for an immediate place
- A parental survey
- Engagement of key stakeholders to access knowledge and intelligence regarding current and future demand
- Use of strategic planning documents and data regarding current and future population; demographic and socio-economic trends, to identify likely future demand
- Identifying the level and type of unmet current and future demand, calculated by analysing the gap between current provision (type, capacity, location) and the current and predicted future demand

Neighbourhood Planning Areas

The Childcare Sufficiency Assessment utilises Cardiff’s Neighbourhood Planning Areas (NPAs) as geographical sub-divisions of the city and county. Electoral wards in each area are shown overleaf.

Table: Cardiff Neighbourhood Planning Areas

Neighbourhood Planning Area	Electoral Wards
Cardiff North	Rhiwbina, Heath, Lisvane, Llanishen, Cyncoed, Penylan, Pentwyn, Pontprennau & Old St. Mellons
Cardiff East	Llanrumney, Rumney, Trowbridge
Cardiff South East	Gabalfa, Cathays (part), Plasnewydd, Adamsdown, Splott
Cardiff City & South	City Centre, Butetown, Grangetown, Cathays (part)
Cardiff South West	Ely, Caerau, Canton, Riverside
Cardiff West	Creigiau / St Fagans, Pentyrch, Radyr & Morganstown, Whitchurch & Tongwynlais, Fairwater, Llandaff, Llandaff North

Headline findings

The findings of the Childcare Sufficiency Assessment indicate that mostly across Cardiff, there is sufficient childcare to meet the needs of parents to access work and training. However, there are some localities, types of childcare provision and specific childcare services where the data indicates that there is some unmet demand.

The data used to draw these conclusions has been drawn from several different sources, including the most recent mid-year estimates of population, pupil data supplied by Education, and childcare providers' records held on the Dewis database. The main data source for this assessment was the information supplied by childcare settings to the Care Inspectorate Wales, via the Self Assessment of Service Statement (SASS).

There are concerns regarding the accuracy of some of the SASS data supplied, with a number of data outliers identified. Further investigation will be required in some cases to confirm the data findings. Where further investigation is required, this has been identified in the action plan.

There are five main areas for action identified in the assessment, as shown below:

Potential unmet demand

There are lower levels of provision in Cardiff East compared to Cardiff as whole, and pockets of potential demand for specific services in four other NPAs (Cardiff North, City and Cardiff South, Cardiff South West and Cardiff West). Initial investigation will seek to confirm the level of unmet demand, and plan actions appropriately based on these findings.

Welsh medium provision and the Welsh language

The data identifies potential Welsh medium demand for morning sessions in Cardiff North; full daycare and Cylch Meithrin sessions in Cardiff West; and after school care in City and Cardiff South, Cardiff South West and Cardiff West. If confirmed following further investigation, opportunities will be pursued, working closely with Education partners to utilise current and future capital funding made available to support Cymraeg 2050 and the Cardiff Welsh in Education Strategic Plan (WESP), to develop or expand Welsh medium childcare linked to Welsh medium primary schools.

Promotion of funded Welsh language taster courses designed for the childcare and early years workforce will seek to address the low numbers of Welsh medium childminders and limited Welsh language skills of many childcare staff.

Affordability

Affordability remains a key issue for many families who want or need to access childcare. Cardiff Family Advice and Support are key partners in increasing parents' and carers' knowledge about the range of financial assistance available to help with childcare costs. There is scope to encourage more settings to sign up to provide Tax free Childcare to assist working parents.

ALN, SEN and disability

Data indicates that not all childcare settings are aware of the Additional Learning Needs and Education Tribunal (Wales) Act 2018 (ALNet) and their responsibilities.

The action plan highlights actions to increase awareness across the sector and settings and their access to advice, support, guidance and training, in order to respond to the needs of children.

Support for the childcare sector

Feedback from providers highlights significant concerns across the sector with regards to settings being able to recruit and retain qualified childcare employees. There are opportunities for working with the Councils' Into Work Service and the Cardiff Commitment to contribute to supporting the sector.

Improving quality, accuracy, and consistency of data

In undertaking the assessment, it is clear that not all contributors have a shared understanding of some of the language and terminology used when submitting the data required. This leads to inaccuracies in data reporting and therefore impacts on the robustness of the assessment.

Work is needed to ensure the annual updates, and future Childcare Sufficiency Assessments are informed by the most robust data possible so although not Cardiff specific, actions with key stakeholder partners to improve data accuracy are also included.

More detailed actions taken from the main body of the document are included in the table overleaf.

Provision: potential unmet demand	Given the largest disparity between registered childcare places and numbers of children aged 0-14 exists in Cardiff East, a further investigation of the local factors influencing demand and supply will be undertaken. However, it should be noted that no service in this NPA appears to have any children awaiting an immediate place. If required, a local action plan will be developed.
	For the four NPAs (Cardiff North; City and Cardiff South; Cardiff South West; Cardiff West) where demand appears to outweigh capacity, conduct detailed investigation to ascertain robustness of data. If demand exists, contact local providers of identified services to explore ability to expand provision from existing sites.
	Investigate potential demand for Mornings and Lunch sessional day care provision in Cardiff North
	Identify if any unmet demand exists for out of school in Cardiff East and City and Cardiff South
Welsh medium provision and the Welsh language	The Childcare Business Support Team will actively target individual with Welsh language skills when marketing the childminding qualifying training
	Identify if robust evidence for unmet Welsh-medium out of school care demand exists in Cardiff South West.
	Further investigate if demand above capacity to supply exists for Welsh medium full daycare or Cylch Meithrin sessions in Cardiff West. Explore with existing providers within areas where demand above capacity to supply is confirmed whether there are possibilities to expand existing provision
	Further investigate if demand above capacity to supply exists for Welsh medium Morning sessions in Cardiff North. Explore with existing providers within areas where demand above capacity to supply is confirmed whether there are possibilities to expand existing provision.
	Identify if robust evidence for unmet Welsh-medium out of school care demand exists in City & Cardiff South, Cardiff West and Cardiff South West. Identify if current Welsh medium out of school providers have the capacity to expand places offered.
	Work with partners including the Welsh Government, Education and Mudiad Meithrin to deliver the actions identified in the Cardiff WESP 2022 – 2031
	Signpost the expanded training programme for early years practitioners (increased apprenticeships, the Academi programme and the Croesi'r Bont programme which immerses new practitioners in Welsh) as highlighted in the Cymraeg 2050 2021-2026 Action Plan, in order to increase the number of Welsh speakers within the childcare workforce, especially in English / Both settings.

Affordability	Encourage more setting, initially targeting sessional day care, to sign up to provide Tax Free Childcare and/or accept Childcare Vouchers. Only 13 (33.3%) of sessional day care providers are currently signed up, the lowest proportion of any provider type.
	Continue to provide parents/carers with information of financial assistance with childcare costs via Cardiff Family Advice and Support. The Childcare Business Support Team and Cardiff Family Advice and Support will develop and market an information resource identifying the range of sources of financial assistance with childcare costs.
	Work with Cardiff Inclusion Services, Workforce Development and Cwlwm partners to continue to promote the training offered to childcare providers. The training provides information and advice to increase awareness of the Additional Needs Code and enhance ALN/SEN practice
	Work with childcare providers and partners to identify any barriers to accessing training and advice around ALN/SEN
	Continue to promote the Assisted Places Grant, which provides funding for additional staffing support to allow access to childcare for the children of working parents who could not otherwise safely attend.
ALN, SEN and disability	Work with Cardiff Inclusion Services, Workforce Development and Cwlwm partners to continue to promote the training offered to childcare providers. The training provides information and advice to increase awareness of the Additional Needs Code and enhance ALN/SEN practice
	Work with childcare providers and partners to identify any barriers to accessing training and advice around ALN/SEN
	Continue to promote the Assisted Places Grant, which provides funding for additional staffing support to allow access to childcare for the children of working parents who could not otherwise safely attend.
Support for the childcare sector	Following the most recent (Q3, Q4 20231-22) additional grant funding provided via the Childcare and Play/Children and Communities Grant, contact providers to generate updated sustainability data for inclusion in the final CSA submitted to Welsh Government in June 2022
	Continue to promote childcare as a career of choice through The Cardiff Commitment and Cardiff's Into Work Service to encourage access to apprenticeships and qualifying training opportunities to young people, unemployed people and individuals from under –represented groups
Improving quality, accuracy, and consistency of data	Work with Education, Welsh Government and Care Inspectorate Wales colleagues, to ensure childcare providers correctly understand the use and meaning of terminology relating to early education placements, in order to improve the accuracy of future SASS and other data collection exercises
	With Flying Start, Welsh Government and Care Inspectorate Wales colleagues, ensure childcare providers correctly understand the use and meaning of terminology relating to Flying Start, in order to improve the accuracy of future SASS and other data collection exercises

1. Introduction and context

The approach taken in conducting this assessment can have been based on the statutory guidance document *Childcare Statutory Guidance (2016)* and the circular letter WGC 003 2021/WG21-28 "*Childcare Statutory Guidance (2016): Securing Sufficient Childcare and Child Sufficiency Assessments*" issued on March 15th, 2021.

Broadly this approach requires local authorities to undertake:

- Mapping of the current provision of childcare, taking into account:
 - the type of registration and the services provided
 - the age range catered for
 - the times of operation
 - the language of provision
 - the location
 - fee levels
 - ability to provide inclusive provision
 - any additional services/facilities provided.
- Mapping of current attendance patterns, along with the level of vacancies or children waiting for an immediate place
- A parental survey
- Engagement of key stakeholders to access knowledge and intelligence regarding current and future demand
- Use of strategic planning documents and data regarding current and future population; demographic and socio-economic trends, to identify likely future demand
- Identifying the level and type of unmet current and future demand, calculated by analysing the gap between current provision (type, capacity, location) and the current and predicted future demand

Key considerations - current provision

Three main data sources were available for this assessment.

Self-Assessment of Service Statement (SASS)

Supplied to the City of Cardiff Council by the Care Inspectorate Wales (CIW), this data source was collected from Cardiff childcare providers in the summer of 2021 via the Self-Assessment of Service Statement (SASS). The data was collected via an online questionnaire, completed by the 'Responsible Individual/s or Registered Person/s' of registered childcare settings.

- The information contained in the SASS returns included material that could be utilised for the Childcare Sufficiency Assessment (CSA). It also contained other information required by the CIW and by local authorities in order to meet the statutory guidance issued to accompany the Childcare Act 2006 and the School Standards Framework Act 1998. As part of the methodology, it was necessary to extract from the SASS only the information necessary and relevant for the completion of the CSA.
- The overall SASS response rate for Cardiff was 89%, with response rates varying across registration types. 85.4% of childminders, 88% of out of school and 97.6% of full daycare submitted a completed SASS. This rate reflects only settings that were eligible to submit a SASS. Services not registered, newly registered, or temporarily suspended at the time of the SASS were not required to submit.

Table: SASS response rate by setting type. Cardiff, 2021

No. of Services that submitted SASS returns by Type of Service

Local Authority		Cardiff
Service Type	Child Minder	187
	Creche	2
	Full Day Care	83
	Open Access Play Provision	1
	Out of School Care	44
	Sessional Day Care	38
Total		355

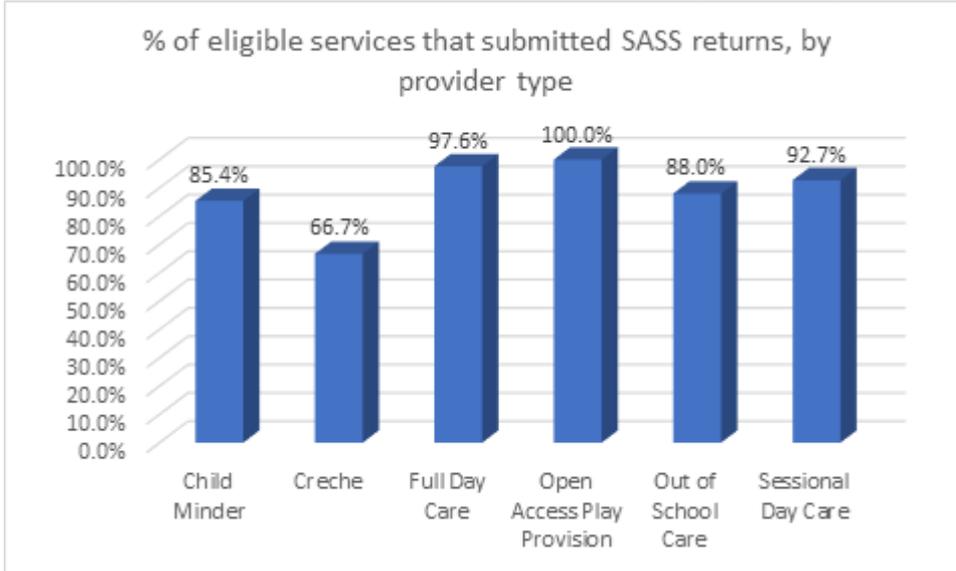
No. of Services eligible to submit SASS returns by Type of Service

Local Authority		Cardiff
Service Type	Child Minder	219
	Creche	3
	Full Day Care	85
	Open Access Play Provision	1
	Out of School Care	50
	Sessional Day Care	41
Total		399

% of Eligible Services that submitted SASS returns by Type of Service

Local Authority		Cardiff
Service Type	Child Minder	85.4%
	Creche	66.7%
	Full Day Care	97.6%
	Open Access Play Provision	100.0%
	Out of School Care	88.0%
	Sessional Day Care	92.7%
Total		89.0%

Chart: % of eligible services that submitted SASS returns, by provider type



- The Welsh Government, CIW and colleagues from the All Wales Association of Representatives of Early Years Development and Childcare Partnerships (AWARE) produced guidance for registered settings to help in the completion of the SASS.
- The review of responses indicated either that the guidance had not been followed, or that there had been a wide range of interpretations of the guidance. Where errors (or potential errors) have been identified, given that it is not possible to amend or correct the source data,
 - red font has been used in tables,
 - data has been circled in red on charts, and
 - comments have been included at the end of each section.

Cardiff Family Advice and Support – Dewis database

Cardiff Family Advice and Support operate Cardiff’s Family Information Service, and in common with all other local authorities in Wales, data on childcare provision is held on the Dewis database.

Dewis Cymru is the all-Wales database established under the Social Services and Well-being Wales Act to provide families and professionals with information about services that support well-being. Childcare providers are encouraged to create and maintain a current record on Dewis Cymru of their services.

Dewis Cymru is also used as a source of data for the CSA as it can be useful to compare some of the data held on Dewis Cymru with that supplied via the SASS. Both are reliant on childcare providers

entering accurate information. Cross-referencing the two data sources can prove useful in highlighting both alignment and differences, for example, around reported fee levels.

Parent/carer Survey

The Welsh Government worked with AWARE partners to develop a common, all Wales parent/carer survey for the CSA. This was promoted on a national and local level, and distributed to schools, childcare settings and other relevant stakeholders. Please see chapter 8: Understanding the needs of parents and carers for results related to this survey.

Cardiff received 406 completed questionnaires, which represents slightly over 1% of the families with dependent children aged 17 and under in Cardiff, based on 2011 Census data. Although the survey would not be pertinent or relevant to every household with dependent children, the limited response to the survey means that the data is not statistically significant and therefore there are limits to how much this source can be used to inform the CSA. Any comments made by parents in response to the survey and used in this report should be seen as the views and opinions of that parent at the time of completion of the survey and cannot be extrapolated out to apply to the wider population. It should be noted as not all respondents answered all questions, the number of responses received (n) has been included.

2. Partnership Working and Consultation

In line with schedule 2 of the statutory guidance, once the draft CSA is published on the Council's website, formal responses will be requested from the following:

- Regional Safeguarding Children Board
- Welsh Medium Education Forum
- Play Monitoring Group
- Job Centre Plus Offices

Responses received from other stakeholders are included in chapter 16: *Consultation responses*.

As part of the Play Sufficiency Assessment children's consultation process, several questions have been included specifically for children who attend childcare settings. The results of this consultation will be included in the final version of the CSA submitted to the Welsh Government in June 2022.

3. The Childcare Sufficiency Assessment and Local Well-Being Needs Assessment

The summary below was included in the most recent (2017) Local Well-being Needs Assessment

The most recent assessments conclude that there are no significant childcare sufficiency gaps at present, and that for the vast majority childcare provision is meeting the needs of families in Cardiff. However, it is noted that demand for out of school childcare is expected to rise due to changes in the welfare system and the projected growth in the population of Cardiff. You can read more on the Family Information Service website.

The Executive Summary and Action Plan of the 2022-2027 CSA will be shared with the Local Well-being Needs Assessment team to allow them to include a relevant summary in their assessment.

4. Population

Cardiff has a population of 369,202 based on the 2020 Mid-Year Estimates

(<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/wardlevelmidyearpopulationestimatesexperimental>) .

Whilst this is an increase of 12,042 people from the 2015 Mid-Year Estimate figure of 357,160, the growth in population has not been as rapid as previously expected.

There are 64,357 children aged 0 – 14 years old, and a further 23,232 aged 15 to 19 year olds. Children and young people under 19 make up 23.7% of the local authority’s population.

Table: Population by NPA: % by age groups (MYE;2020)

NB: Figures above the Cardiff average are in **bold** and the highest NPA figure is shaded.

Chart

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Demography and Dynamics							
Resident Population	97,859	38,218	69,537	43,317	57,384	62,887	369,202
% Population Aged 0-14	18.7	22.2	11.6	14.3	20.9	18.0	17.4
% Population Aged 15-19	6.0	6.0	8.5	6.0	5.4	5.5	6.3
% Population Aged 20-64	55.5	56.7	73.5	72.4	61.0	56.4	62.0
% Population Aged 65+	19.8	15.1	6.5	7.3	12.8	20.1	14.3

NB. NPA figures calculated using LSOA data. LSOAs have been assigned to NPAs on a best fit basis. Source: Population/age structure calculated using mid-2020 small area population estimates.

All other information is taken from the 2011 Census

Neighbourhood Planning Areas

A 2013 White Paper, “**Building Communities: A New Approach to Neighbourhood Working**” re-organised the 29 wards into 6 Neighbourhood Partnership Areas, now Neighbourhood Planning Areas (NPAs). The wards in each of these NPAs are set out below and are used throughout the rest of this CSA.

Table: Cardiff Neighbourhood Planning Areas

Neighbourhood Planning Area	Wards
Cardiff North	Rhiwbina, Heath, Lisvane, Llanishen, Cyncoed, Penylan, Pentwyn, Pontprennau & Old St. Mellons
Cardiff East	Llanrumney, Rumney, Trowbridge
Cardiff South East	Gabalfa, Cathays (part), Plasnewydd, Adamsdown, Splott
Cardiff City & South	City Centre, Butetown, Grangetown, Cathays (part)
Cardiff South West	Ely, Caerau, Canton, Riverside
Cardiff West	Creigiau / St Fagans, Pentyrch, Radyr & Morganstown, Whitchurch & Tongwynlais, Fairwater, Llandaff, Llandaff North

Map: Cardiff Neighbourhood Planning Areas (NPAs)

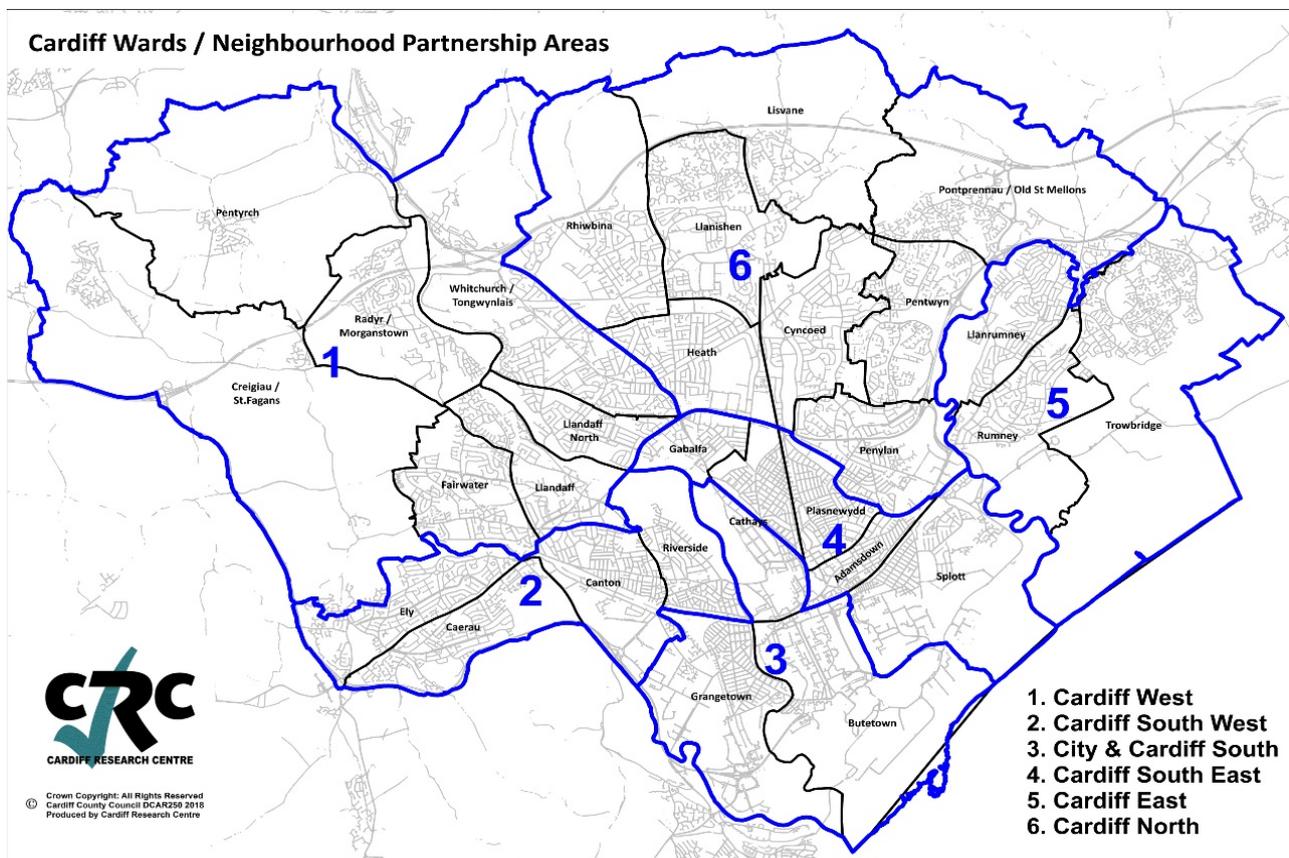


Table: Population by NPA: number by age groups (MYE;2020)

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Resident Population (all ages)	97,859	38,218	69,537	43,317	57,384	62,887	369,202
Population Aged 0-14	18,300	8,484	8,066	6,194.3	11,993	11,320	64,357
Population Aged 15-19	5,871	2,293	5,911	2,599	3,099	3,459	23,232
Population Aged 20-64	54,312	21,670	51,040	31,362	35,004	35,468	228,856
Population Aged 65+	19,376	5,771	4,520	3,162	7,288	12,640	52,757

Table: population by age grouping used in SASS

Age	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Age 0	974	456	595	434	753	585	3,797
Age 1	1,080	496	548	422	717	651	3,914
Age 2	1,105	497	579	437	750	669	4,037
Age 3	1,209	533	546	429	767	684	4,168
Age 4	1,310	559	608	488	796	740	4,501
Age 0 - 4	5,678	2,541	2,876	2,210	3,783	3,329	20,417
Age 5	1,233	576	569	438	797	782	4,395
Age 6	1,251	598	549	398	840	779	4,415
Age 7	1,294	572	554	410	792	807	4,429
Age 5 - 7	3,778	1,746	1,672	1,246	2,429	2,368	13,239
Age 8	1,357	645	522	419	860	815	4,618
Age 9	1,310	612	527	439	901	850	4,639
Age 10	1,261	588	527	390	815	777	4,358
Age 11	1,218	583	483	393	830	814	4,321
Age 8 - 11	5,146	2,428	2,059	1,641	3,406	3,256	17,936
Age 12	1,241	612	487	365	850	804	4,359
Age 13	1,251	597	454	357	773	805	4,237
Age 14	1,162	555	490	357	752	760	4,076
Age 12 - 14	3,654	1,764	1,431	1,079	2,375	2,369	12,672
Age 15	1,053	477	539	365	630	667	3,731
Age 16	1,058	426	559	331	618	684	3,676
Age 17	988	452	628	364	611	658	3,701
Age 15 - 17	3,099	1,355	1,726	1,060	1,859	2,009	11,108
Total Age 0-17	21,355	9,834	9,764	7,236	13,852	13,331	75,372

Chart: Number of children aged 0 – 4 years by age and NPA

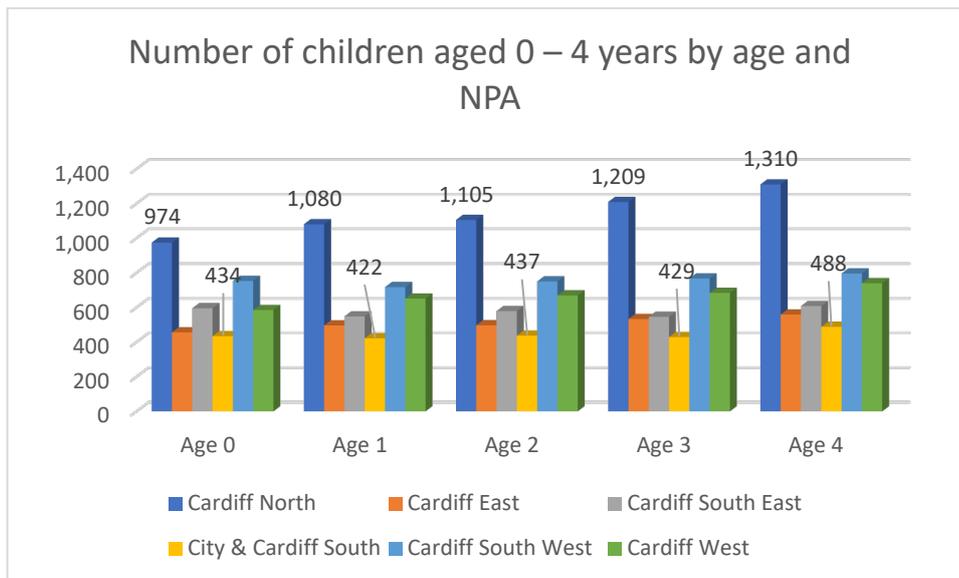
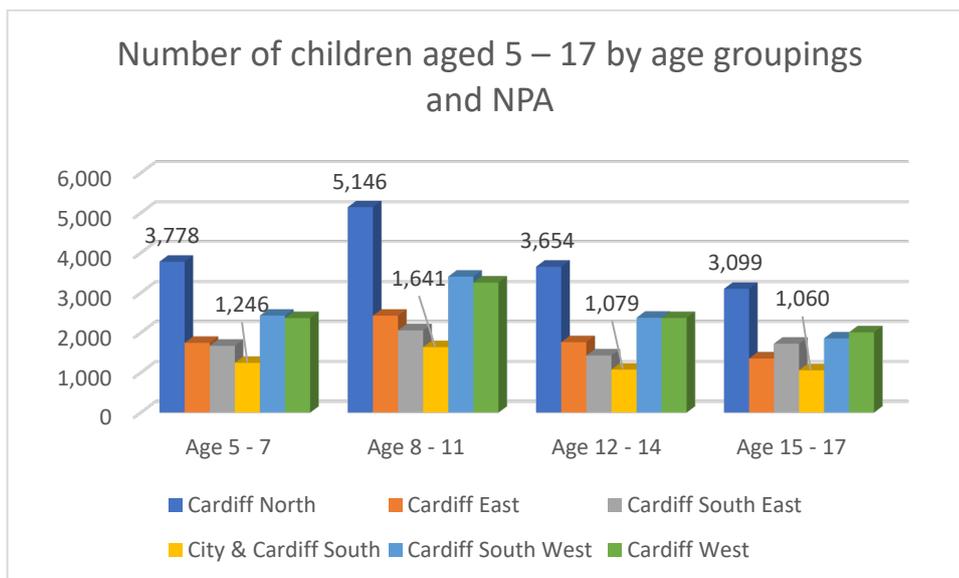


Chart: Number of children aged 5 – 17 by age groupings and NPA



- Cardiff North has the highest number of children of all ages and age groups, with nearly three times the child population aged 0 – 17 (21,355) of that of City & Cardiff South, the NPA with the fewest children aged 0 – 17 (7,236)
- However, children aged 0-17 make up a higher percentage of the population in Cardiff East (22.2%) and Cardiff South West (20.9%) than in Cardiff North (18.7%; Cardiff = 17.4%)

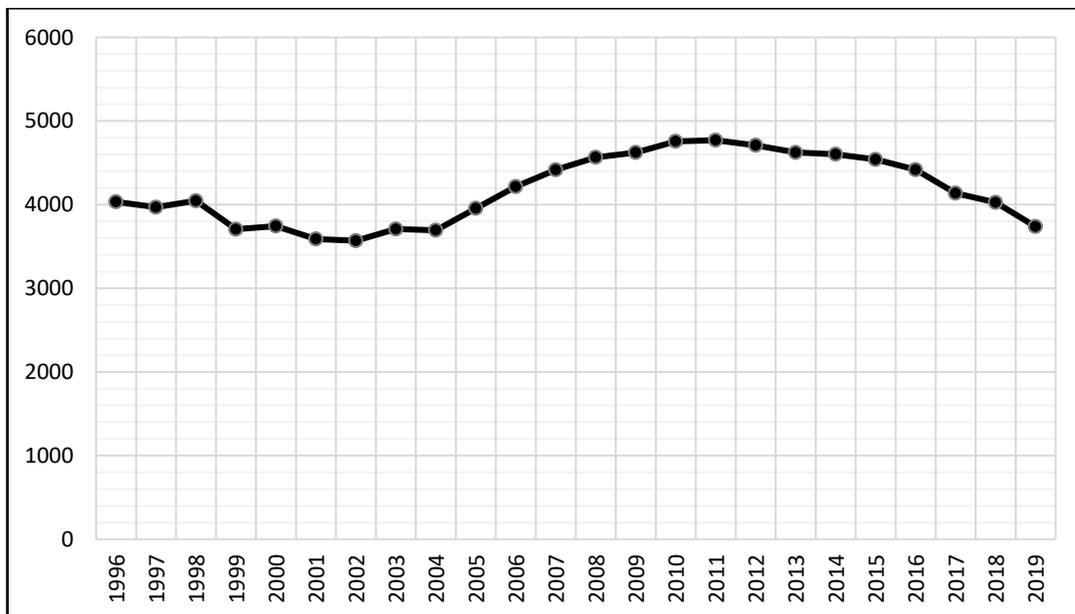
Birth rates and future population changes

Birth rates in Cardiff have fluctuated significantly in recent history. Population data published on the Welsh Government (Stats Wales) website indicates a cyclical pattern over the past 25 years.

The chart below shows that the number of births fell between 1996 and 2002, at which point the number had fallen to 3,569.

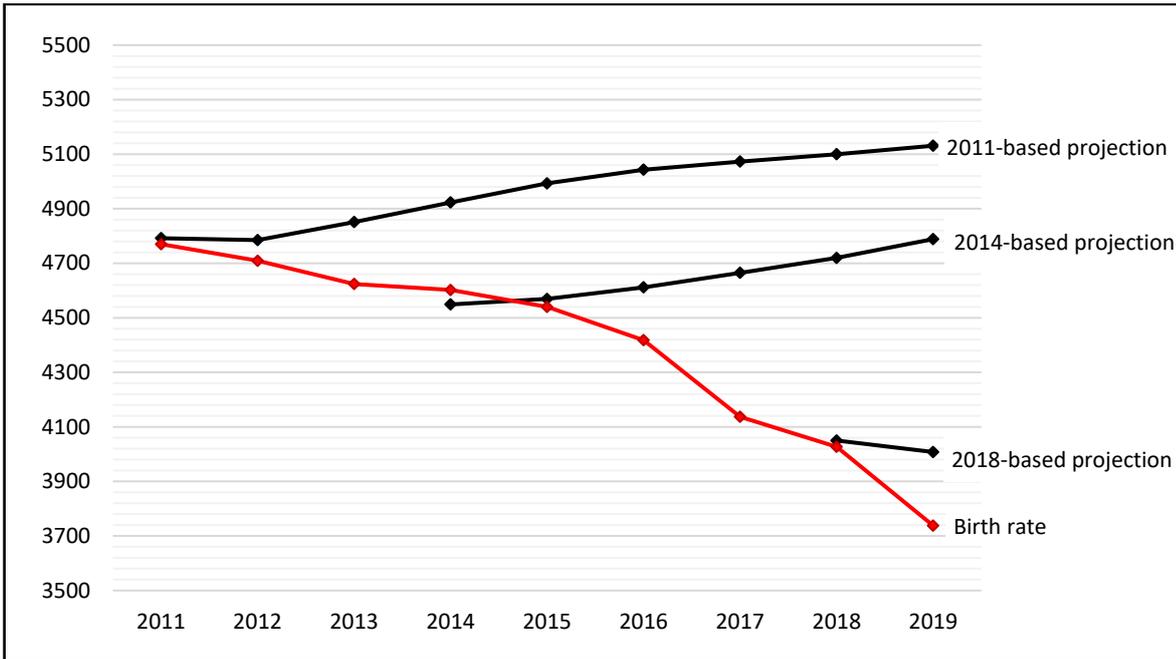
A period of growth followed until a peak of 4770 in 2011, an increase of over 33%. Births started to fall in 2012 and have been decreasing since. Following this pattern, it is more likely that we will continue to see rises and falls in the birth rate rather than a more linear increase over time.

Chart: Births in Cardiff 1996 – 2019 (Stats Wales)



This cycle observed in Cardiff's birth rate data differs to the population projections published by Welsh Government in 2011 and 2014, and differs to the most recent 2018-based projections published in 2020:

Chart: Welsh Government projections for number of 0 year olds compared with the birth rate



The Council collects GP registration data from the NHS each year which indicates that the birth rate in Cardiff 2020, when published, will be lower than the birth rate projected by the Welsh Government.

Future Changes

The Welsh Government publishes population projections for Wales, which are based on the Office of National Statistics' (ONS) national population projections for the UK. The most recent set of projections, based on 2018 data, were published on 4th August 2020. They cover the 25-year period from 2018 to 2043.

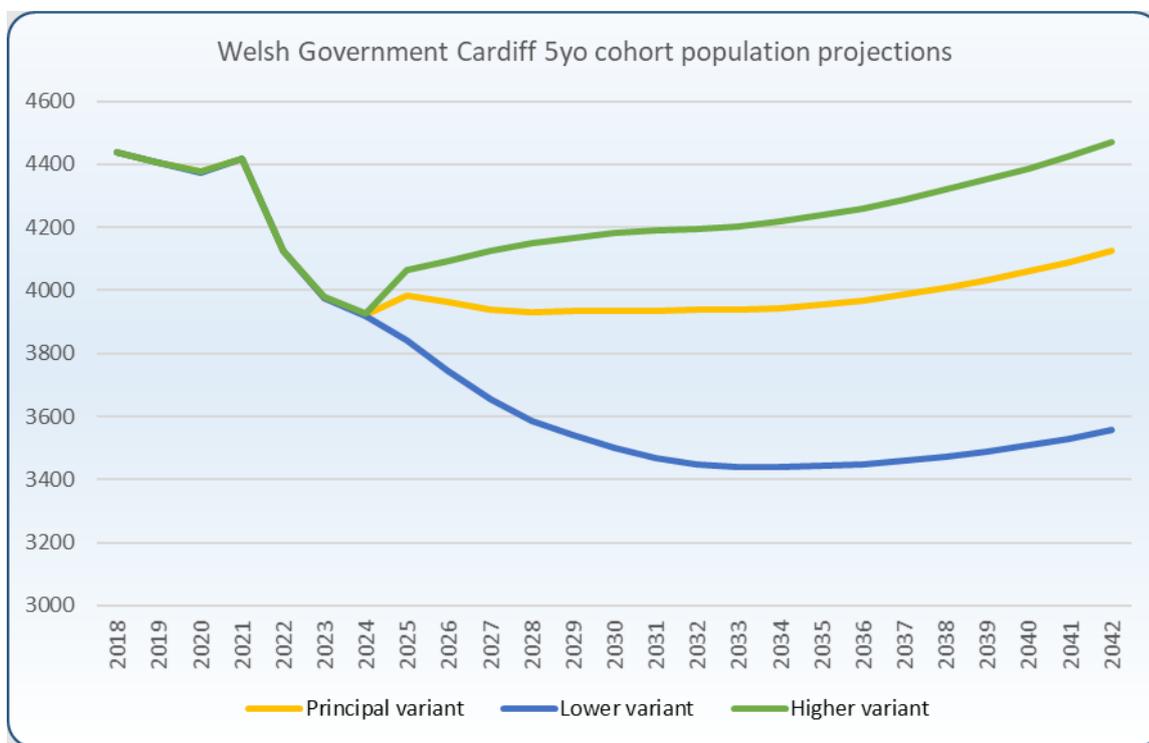
The projections do not predict what will happen in the way a forecast would. Rather, they make assumptions about future changes and show what the population would be if those future changes do occur. They do not predict the impact of external factors such as government policies or economic conditions.

Three different variants were published in 2020: principal, high and low. These are based on assumptions about future fertility, mortality and migration. The principal is the main projection i.e., the best reflection of patterns in demographics. The high and low offer alternative future scenarios, taking into account different assumptions of the three population factors. The variants are not set as limits, but rather give a level of flexibility that reflects the uncertainty of projecting changes in population.

The 2018-based projections show a lower increase in the population in Cardiff than the previous 2014-based projections. The population increase is 6.8% lower than the previous projections. However, Cardiff's population is still projected to increase by 3.2%. Whilst this is not the largest percentage increase within Wales, Cardiff still remains the largest local authority with a projected population of over 375,700 by 2028.

Unlike other areas, the increase in Cardiff's population is largely due to a higher number of births than deaths, with just a small increase from net migration. Although the projections show a decrease in the number of children and young people aged 0 to 15 years old, the number of births is projected to increase between 2018 and 2028.

Chart: Welsh Government projections for the number of 5 year olds in Cardiff 2018-2043



However, as outlined on page 8, birth rates in Cardiff have followed a cyclical pattern in the past 25 years. Birth rates have fallen below each of the three WG population projection trajectories published in 2011, 2014 and most recently in 2020 (based on 2018 data).

Population: Employment; working patterns; household composition

Table: Population indicators by NPA: Unemployment; hours worked

NB: Figures above the Cardiff average are in **bold** and the highest NPA figure is shaded

Unemployment (% of residents aged 16-74)							
	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
% Unemployed	3.5	6.1	4.5	4.7	5.8	3.6	4.4
% of Unemployed: Never worked	14.9	18.6	19.6	19.4	20.9	15.2	18.1
% of Unemployed: Long term unemployed	37.3	41.2	35.5	38.6	37.2	38.0	37.7
Hours Worked by those in Employment (% of residents aged 16-74 in employment)							
% Part time (up to 15 hours)	9.2	7.8	18.4	8.4	8.2	9.0	10.4
% Part time (16 to 30 hours)	19.1	22.4	18.6	16.0	21.4	20.4	19.6
% Full time (31 hours or more)	71.7	69.8	63.1	75.6	70.4	70.6	70.0

Source: Population/age structure calculated using mid-2020 small area population estimates. All other information is taken from the 2011 Census.

Table: Household composition and Family Status by Number of Parents Working

Household Composition							
	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Lone Parent with Dependent Children (number of households)	2,314	1,904	1,543	851	2,495	1,829	10,936
Family Status by Number of Parents Working (All parents aged 16 and over with dependent children)							
% Couple family: Both parents working	64.0	45.2	40.4	32.9	42.6	63.7	52.8
% Couple family: One parent working	18.5	18.6	25.9	32.2	22.1	16.7	20.7
% Couple family: No parents working	3.8	8.8	10.4	14.6	9.5	3.4	6.9
% Lone parent family: Parent working	9.0	13.2	11.3	9.4	12.2	10.5	10.7
% Lone parent family: Parent not working	4.7	14.2	12.0	10.9	13.6	5.7	8.9
NB. NPA figures calculated using LSOA data. LSOAs have been assigned to NPAs on a best fit basis. All other information is taken from the 2011 Census.							

Chart: Lone parent households with dependent children by NPA

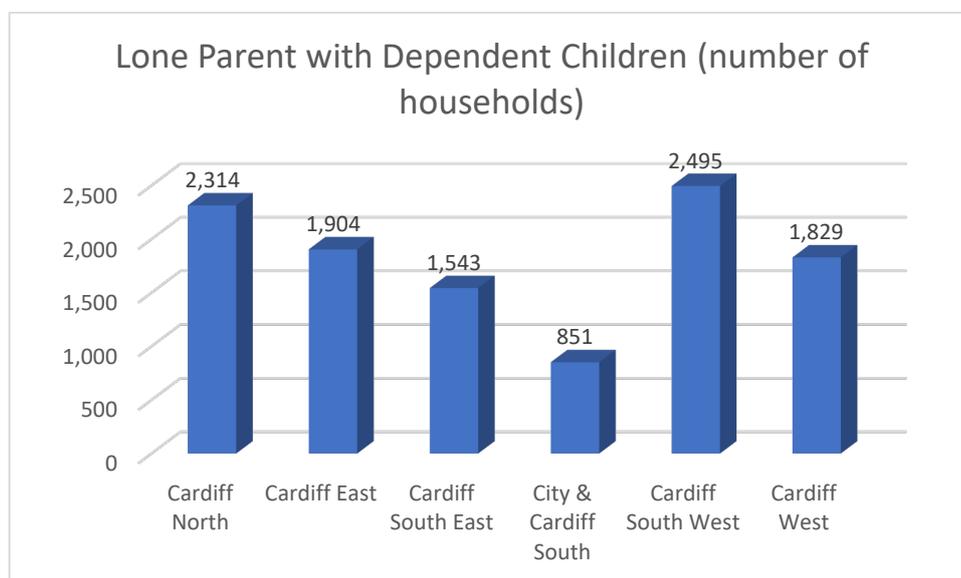
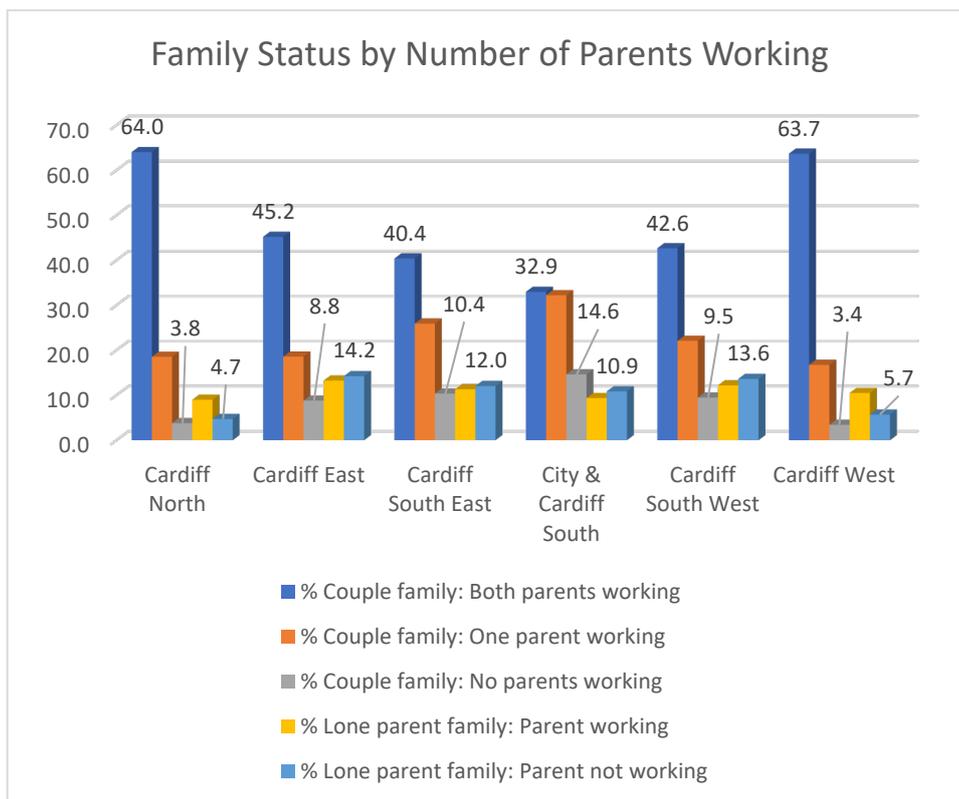


Chart: Family Status by Number of Parents Working (All parents aged 16 and over with dependent children)



- Of unemployed people, the highest percentage of long-term unemployed people live in Cardiff East (41.2%), followed by City and South (38.6%) and Cardiff West (38%). The Cardiff average is 37.7%.
- The highest number of lone parent families with dependent children are in Cardiff South West (2,495), followed by Cardiff North (2,314). The smallest number are in City& Cardiff South (851)
- The NPA with the highest percentage of families where all parents work is Cardiff West (63.7% of two parent families, 10.5% of lone parent families). The NPA with the lowest percentage is City & Cardiff South (32.9% of two parent families, 9.4% of lone parent families). NB: all parents in a family must be working and earning within the permissible income range to be eligible for the Childcare Offer (assuming they have an eligibly aged child)
- The % of ‘both couples working’ varies by 31.1 percentage points between the highest (Cardiff North at 64%) and the lowest (City & Cardiff South at 32.9%). The % of lone parents working varies by 4.2 percentage points between the highest (Cardiff East at 13.2%) to the lowest in Cardiff North (9%)

Children in workless households (as at year end 2018)

Table: Number and % of children in workless households 2018

Cardiff	9,200	13.1
Wales	68,700	12.6

Source: Stats Wales [Children living in workless households by area, variable and household status \(gov.wales\)](#)

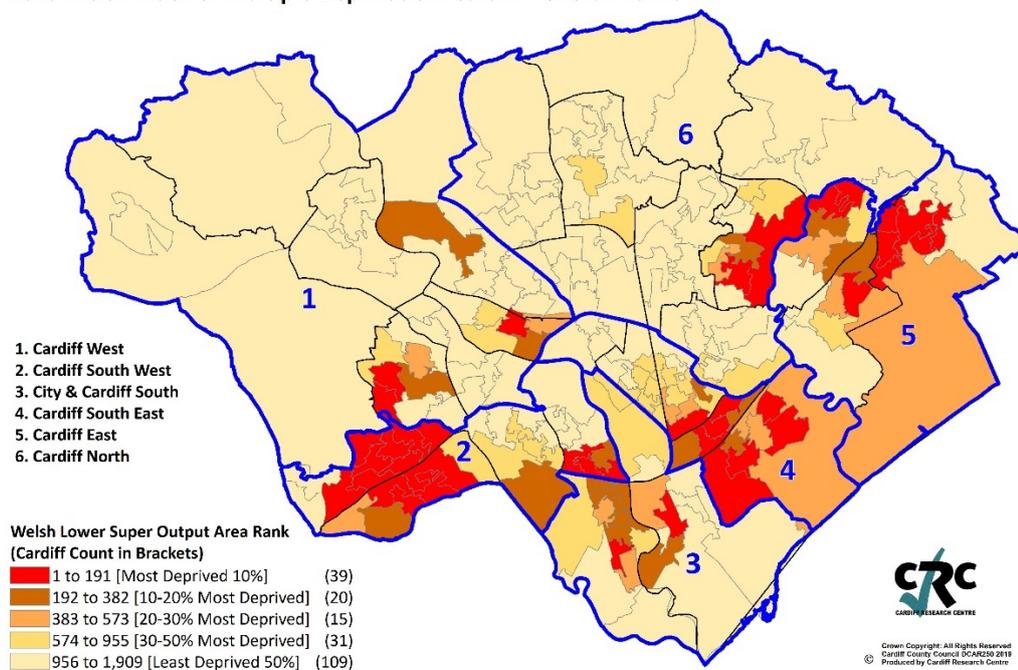
- Cardiff has a higher percentage of children living in workless households (13.1%) than the Wales average (12.6%)

WIMD – Child Deprivation

The Welsh Index of Multiple Deprivation (WIMD) is the official measure of relative deprivation² for small areas in Wales. It is designed to identify those small areas containing 1,000 to 3,000 people, known as lower super output areas, where there are the highest concentrations of different types of deprivation. In terms of overall performance in the WIMD, only two other local authorities in Wales have a higher percentage of people who are amongst the 10% most deprived in Wales.

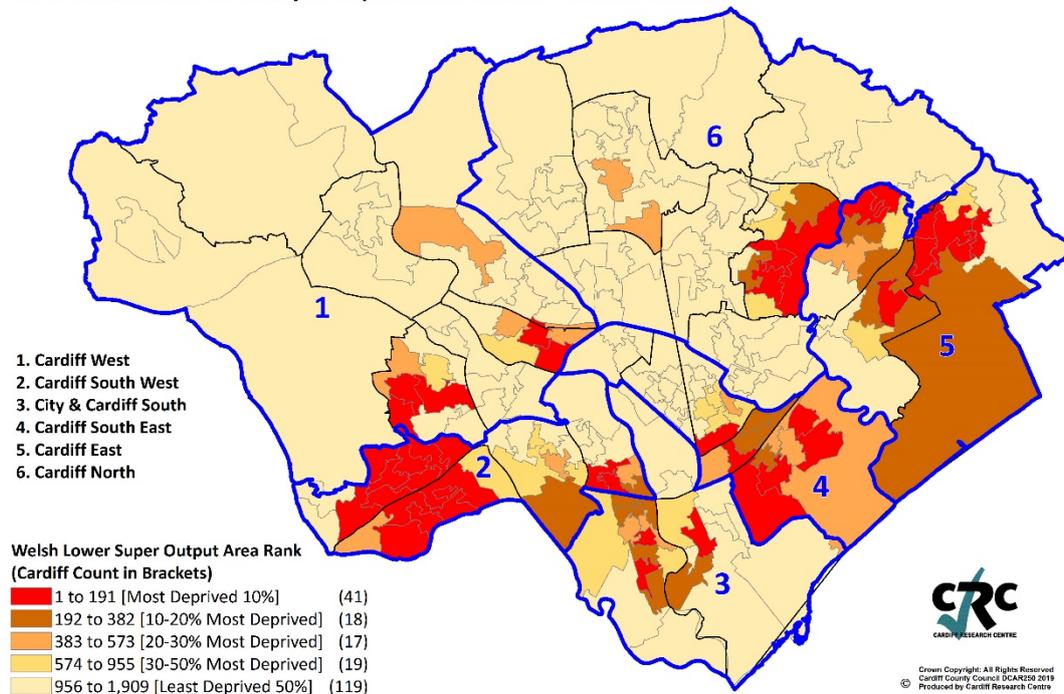
Map: 2019 Welsh Index of Multiple Deprivation: Cardiff – overall ranks, NPAs

2019 Welsh Index of Multiple Deprivation: Cardiff - Overall Ranks



Map: 2019 Welsh Index of Multiple Deprivation: Cardiff – Income domain, NPAs

2019 Welsh Index of Multiple Deprivation: Cardiff - Income Domain



The table below shows for the child income deprivation indicator, the percentage of small areas (LSOAs) in each Local Authority which were in each of the following cumulative groups: the most deprived 10%, 20%, 30% and 50% of LSOAs in Wales. This analysis can be seen as identifying the concentration of the most deprived areas in a Local Authority, rather than an average level of deprivation

Table: child income deprivation indicator

Local authority	Number of LSOAs in local authority	% LSOAs with the 10% highest rates (46 - 99%)	% LSOAs with the 20% highest rates (37 - 99%)	% LSOAs with the 30% highest rates (31 - 99%)	% LSOAs with the 50% highest rates (22 - 99%)
Cardiff	214	20.1	33.2	42.5	52.3
Wales	1909	10.0	20.0	30.0	50.0

[Area Analysis of Child Deprivation 2014 \(WIMD Indicators 2014\) \(ioe.ac.uk\)](http://ioe.ac.uk)

- The Local Authority with the highest proportion of LSOAs in the most deprived 10% in Wales for child income deprivation was Cardiff (20.1 per cent).

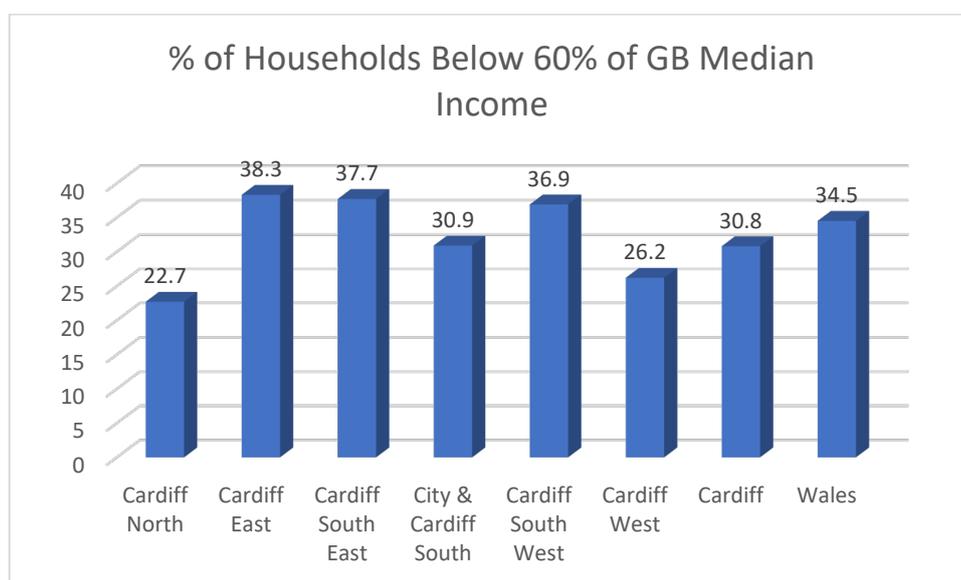
Household income poverty

Table: % of households in Cardiff below 60% of Great Britain median income by neighbourhood partnership area, 2015

NPA	Total Households	No. of Households Below 60% of GB Median Income	% of Households Below 60% of GB Median Income
Cardiff North	40,739	9,230	22.7
Cardiff East	15,932	6,105	38.3
Cardiff South East	27,085	10,219	37.7
City & Cardiff South	15,551	4,804	30.9
Cardiff South West	24,156	8,917	36.9
Cardiff West	26,754	7,002	26.2
Cardiff	150,217	46,276	30.8
Wales	1,333,073	459,283	34.5

HOUSEHOLD INCOME POVERTY 2015 Source: Paycheck, CACI

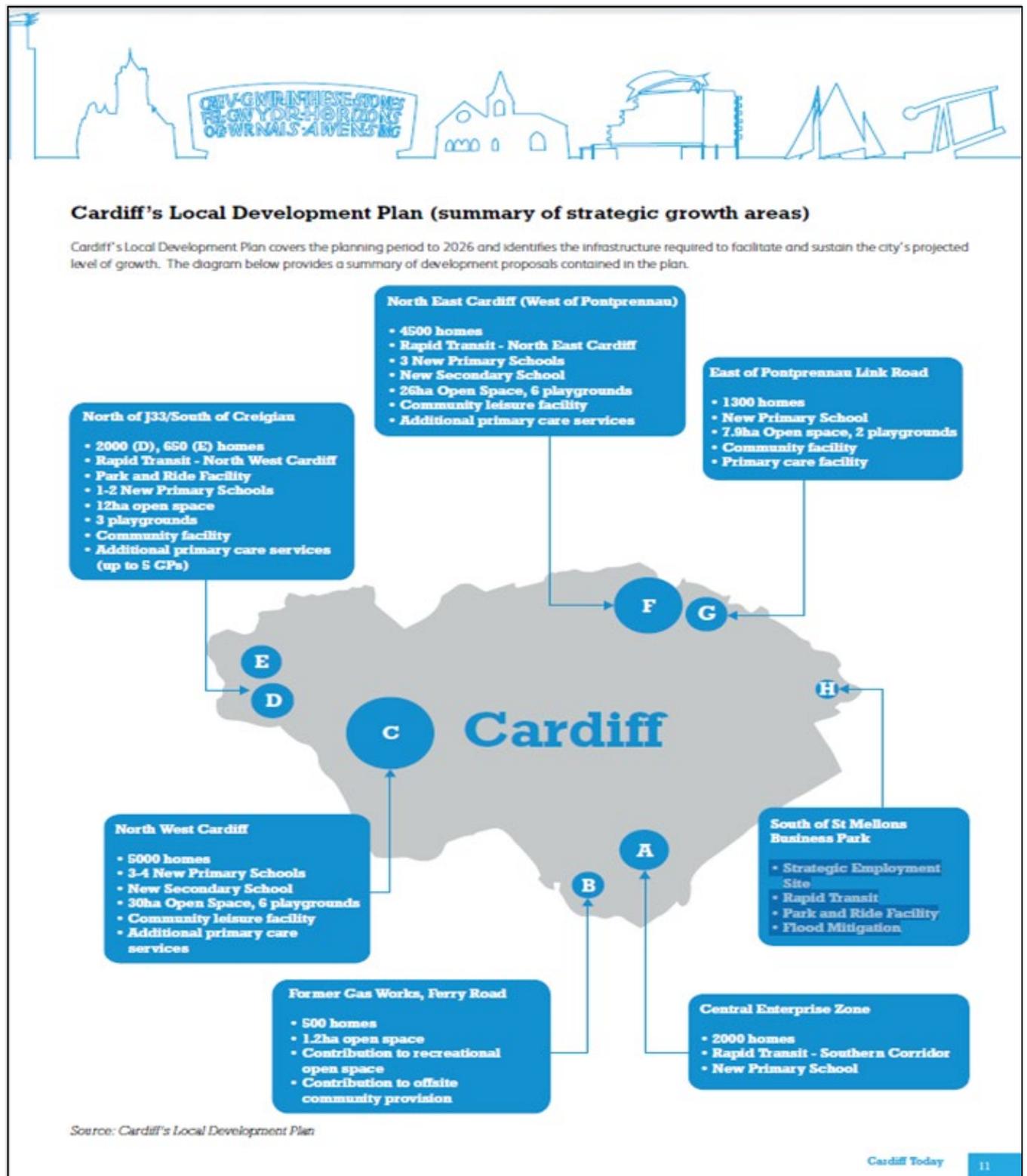
Chart: % of households in Cardiff below 60% of Great Britain median income by neighbourhood partnership area, 2015



- Four NPAs have more than the Cardiff average (30.8%) of households earning below 60% of the median Great Britain median income (City and Cardiff South, Cardiff South West, Cardiff South East and Cardiff East)
- Cardiff South West, Cardiff South East and Cardiff East also have more households earning below 60% of the median Great Britain median income than the Wales average (34.5%)

Local Development Plan

In the last CSA, key strategic development sites identified in the Local Development Plan were included as it was predicted these would influence childcare demand. Please see map below:



The table below shows the development to date highlighted in the Local Development Plan. These developments were scheduled for completion in 2026. Progress on house numbers is shown by number and % of planned housing completed in brackets)

Table: Key developments to date

Development area	Neighbourhood Planning Area	Key Developments	Achievements by 2021
North East Cardiff (West of Pontprennau)	Cardiff North	<ul style="list-style-type: none"> • 4500 homes • Rapid Transit - North East Cardiff • 3 New Primary Schools • New Secondary School • 26ha Open Space, 6 playgrounds • Community leisure facility • Additional primary care services 	122 (2.7%)
East of Pontprennau Link Road	Cardiff North	<ul style="list-style-type: none"> • 1300 homes • New Primary School • 7.9ha Open space, 2 playgrounds • Community facility • Primary care facility 	720 (55.3%)
Central Enterprise Zone	Cardiff City and South	<ul style="list-style-type: none"> • 2000 homes • Rapid Transit - Southern Corridor • New Primary School 	102 (5.1%)
Former Gas Works, Ferry Road	Cardiff City and South	<ul style="list-style-type: none"> • 500 homes • 1.2ha open space • Contribution to recreational open space • Contribution to offsite community provision 	0
North West Cardiff	Cardiff West	<ul style="list-style-type: none"> • 5000 homes 	437 (8.74%)

		<ul style="list-style-type: none"> • 3-4 New Primary Schools • New Secondary School • 30ha Open Space, 6 playgrounds • Community leisure facility • Additional primary care services 	
North of J33/South of Creigiau	Cardiff West	<ul style="list-style-type: none"> • 2000 (D), 650 (E) homes (see map overleaf) • Rapid Transit - North West Cardiff • Park and Ride Facility • 1-2 New Primary Schools • 12ha open space • 3 playgrounds • Community facility • Additional primary care services (up to 5 GPs) 	101 (3.8%)

Commuting

In the last CSA, the following was included:

“A diagram overleaf shows commuting patterns into Cardiff. As noted in the Liveable City Report

“Nearly two out of three net jobs created in South East Wales over the last ten years have been created in Cardiff. Each day over 80,000 people – or over a third of the city’s 200,000-strong workforce – commute into Cardiff from elsewhere in the Cardiff Capital region (the Vale of Glamorgan, Bridgend, Rhondda Cynon Taf, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen, Monmouthshire and Newport).”



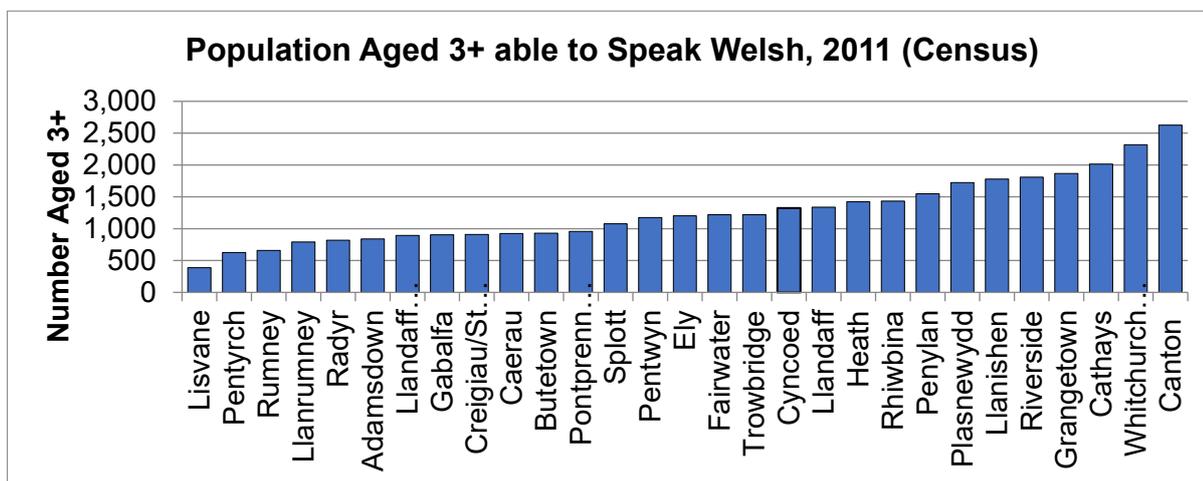
- It is not possible to identify the full impact of Covid –19 on future ‘travel to work’ and commuting behaviour, and the related impact on childcare demand in Cardiff. Many employers, particularly in the public sector have introduced changed working patterns with the introduction of ‘Working from Home’ and ‘Hybrid Working’ (with employees spending some time working from home and some in the office). Although this does not affect all jobs and roles, and many parents will still need childcare either to work away from home, or to allow them to work effectively from home. Notwithstanding this, the parent survey indicated that 207 of the 401 respondents (51.6%) thought they would be using more childcare in the next couple of years. However, it is not clear if these responses are from parents who currently use childcare and will be looking to increase the hours they use, or if they are families who will be using childcare for the first time. It is also not clear if this relates to registered childcare, or childcare that is provided by family and friends. 94 respondents indicated that the childcare they would use would be a school nursery (FPN).

Welsh Language

The 2011 census statistics indicate that 16.2% of the population of Cardiff have one or more skills in the Welsh language (ability to read, write or/and understand Welsh), and 36,735 or 11.1% of the county's population are Welsh speakers. Based on the Welsh Government's Annual Population Survey and Local Authority Profile Data, the number of Welsh speakers is projected to be 42,584 in 2021. This projection will be validated, and all related targets revised as necessary, following publication of the 2021 Census data

The concentration of Welsh speakers across the city's electoral wards ranges from 7-9% in areas such as Llanrumney, Adamsdown and Butetown to 17-19% in Creigiau / St. Fagans, Pentyrch and Canton. It is anticipated that the 2021 Census results will demonstrate a sustained increase in both the number and percentage of Welsh speakers across the city of Cardiff.

Chart: Population Aged 3+ able to Speak Welsh by ward, 2011 (Census)



The growth in the number of Welsh speakers in Cardiff has been driven by two well documented trends:

1. A significant number of Welsh speakers have migrated to Cardiff since the 1980s.
2. The expansion of Welsh medium primary and secondary education driven by policy, practice and the commitment of parents and teaching staff

The city has three Welsh medium secondary schools, and seventeen Welsh primary schools (of which two are dual stream primary schools). The most recent numbers on roll data confirmed 4707 pupils in attendance at primary level, and 2756 aged 11-16 years at secondary level (April 2021).

SEN and Disability

The table below contains data collected in the school census 2021 for Pupils with special educational needs by type of provision

Table: Pupils with SEN by type of provision

All pupils with Special Educational Needs				All pupils with Special Educational Needs
Statemented	Total number of pupils with Special Educational Needs but no Statement of SEN		Total number of pupils with Special Educational Needs but no Statement of SEN	
	School Action	School Action Plus		
2,143	4,187	3,116	7,303	9,446

The following tables show numbers of children by SEN Statement, SEN School Action and SEN School Action Plus by school and Neighbourhood Planning Area. NB: Totals may not be the sum of constituent elements due to rounding.

Table: Cardiff North: SEN Statement, SEN School Action and SEN School Action Plus

NPA	School	Total Pupils	SEN Statement	SEN School Action	SEN School Action Plus
Cardiff North	All Saints C.W Primary School	151	1	15	8
Cardiff North	Birchgrove Primary School	412	4	20	15
Cardiff North	Bryn Celyn Primary School	188	5	11	
Cardiff North	Cardiff High School	1769	44	77	94
Cardiff North	Christ The King R.C Primary School	233	1	13	5
Cardiff North	Coed Glas Primary School	548	30	39	5
Cardiff North	Corpus Christi R.C High School	1087	13	43	95
Cardiff North	Glyngoed Primary School	370	7	27	38
Cardiff North	Greenhill School	64	64		
Cardiff North	Howardian Primary School	438	6	8	10
Cardiff North	Lakeside Primary School	493	11	6	8
Cardiff North	Llanedeyrn Primary School	435	44	34	7
Cardiff North	Llanishen Fach Primary School	504	24	9	19
Cardiff North	Llanishen High School	1632	98	49	106
Cardiff North	Llysfaen Primary School	449	7	17	6
Cardiff North	Marlborough Primary School	528	22	17	1
Cardiff North	Pontprennau Primary School	413	9	11	20
Cardiff North	Rhiwbeina Primary School	708	4	20	2
Cardiff North	Rhydypenau Primary School	496	3	4	4
Cardiff North	Springwood Primary School	248	39	16	12
Cardiff North	St Bernadette's R.C Primary School	265	4	14	18
Cardiff North	St David's C.W Primary School	247	4	13	9
Cardiff North	St Philip Evans R.C Primary School	393	3	16	24
Cardiff North	St Teilo's C.W High School	1427	55	87	81
Cardiff North	The Court School	42	42		
Cardiff North	The Hollies School	109	109		
Cardiff North	Thornhill Primary School	461	9	22	4
Cardiff North	Ton-Yr-Ywen Primary School	479	8	8	6
Cardiff North	Ysgol Gyfun Gymraeg Bro Edern	881	6	51	108
Cardiff North	Ysgol Gynradd Gymraeg Pen-y-Groes	112		8	18
Cardiff North	Ysgol Y Berllan Deg	444	4	2	2
Cardiff North	Ysgol Y Wern	654	8	29	17
Total		16680	688	686	742
% of all pupils: Any SEN; SEN Statement; SEN School Action; SEN School Action Plus		12.7	4.1	4.1	4.4

Table: Cardiff East: SEN Statement, SEN School Action and SEN School Action Plus

NPA	School	Total Pupils	SEN Statement	SEN School Action	SEN School Action Plus
Cardiff East	Bishop Childs C.W Primary School	221	2	13	8
Cardiff East	Bryn Hafod Primary School	439	33	42	43
Cardiff East	Eastern High	1095	30	124	181
Cardiff East	Glan-Yr-Afon Primary School	148	3	25	16
Cardiff East	Greenway Primary School	249	7	13	58
Cardiff East	Meadowlane Primary School	342	11	11	49
Cardiff East	Oakfield Primary School	482	12	29	145
Cardiff East	Pen-Y-Bryn Primary School	243	9	28	45
Cardiff East	Rumney Primary School	480	13	22	45
Cardiff East	St Cadoc's Catholic Primary School	352	5	23	37
Cardiff East	St Illtyd's Catholic High School	915	15	60	106
Cardiff East	St John Lloyd R.C Primary School	325	3	13	69
Cardiff East	St Mellons C.W Primary School	106	1	3	6
Cardiff East	Trowbridge Primary School	195	3	10	24
Cardiff East	Willowbrook Primary School	456	6	19	8
Cardiff East	Ysgol Bro Eirwg	435	2	12	11
Cardiff East	Ysgol Pen Y Pil	215	2	6	8
Total		6698	157	453	859
% of all pupils: Any SEN; SEN Statement; SEN School Action; SEN School Action Plus		21.9	2.3	6.8	12.8

Table: Cardiff South East: SEN Statement, SEN School Action and SEN School Action Plus

NPA	School	Total Pupils	SEN Statement	SEN School Action	SEN School Action Plus
Cardiff South East	Adamsdown Primary School	413	4	33	33
Cardiff South East	Albany Primary School	434	12	24	
Cardiff South East	Allensbank Primary School	218	7	13	9
Cardiff South East	Baden Powell Primary School	361	9	37	53
Cardiff South East	Cathays High School	1037	31	43	74
Cardiff South East	Moorland Primary School	445	10	40	52
Cardiff South East	Roath Park Primary School	481	11	22	4
Cardiff South East	St Alban's R.C Primary School	130	9	11	8
Cardiff South East	St Joseph's R.C Primary School	215	3	11	1
Cardiff South East	St Peter's R.C Primary School	472	4	31	37
Cardiff South East	Stacey Primary School	211	1	22	14
Cardiff South East	Tredegarville C.W Primary School	234	5	12	40
Cardiff South East	Tremorfa Nursery School	62			1
Cardiff South East	Willows High School	730	11	83	55
Cardiff South East	Ysgol Glan Morfa	257	6	9	9
Cardiff South East	Ysgol Mynydd Bychan	256	5	4	21
Total		5956	128	395	411
% of all pupils: Any SEN; SEN Statement; SEN School Action; SEN School Action Plus		15.7	2.1	6.6	6.9

Table: City & Cardiff South: SEN Statement, SEN School Action and SEN School Action Plus

NPA	School	Total Pupils	SEN Statement	SEN School Action	SEN School Action Plus
City & Cardiff South	Gladstone Primary School	226	2	1	10
City & Cardiff South	Grangetown Nursery School	134		7	3
City & Cardiff South	Grangetown Primary School	388	8	43	48
City & Cardiff South	Mount Stuart Primary School	461	7	25	33
City & Cardiff South	Ninian Park Primary School	685	10	53	75
City & Cardiff South	St Cuthbert's R.C Primary School	107	1	4	6
City & Cardiff South	St Mary The Virgin C.W Primary School	206	3	17	67
City & Cardiff South	St Monica's C.W Primary School	126	1	10	2
City & Cardiff South	St Patrick's R.C Primary School	272	5	14	21
City & Cardiff South	St Paul's C.W Primary School	233	8	8	4
City & Cardiff South	Ysgol Gynradd Gymraeg Hamadryad	233	1	5	7
Total		3071	46	187	276
% of all pupils: Any SEN; SEN Statement; SEN School Action; SEN School Action Plus		16.6	1.5	6.1	9

Table: Cardiff South West: SEN Statement, SEN School Action and SEN School Action Plus

NPA	School	Total Pupils	SEN Statement	SEN School Action	SEN School Action Plus
Cardiff South West	Cardiff West Community High School	893	38	109	195
Cardiff South West	Ely and Caerau Childrens Centre	109	1	14	
Cardiff South West	Fitzalan High School	1790	34	131	217
Cardiff South West	Herbert Thompson Primary School	511	10	74	70
Cardiff South West	Hywel Dda Primary School	455	10	79	65
Cardiff South West	Kitchener Primary School	462	7	22	52
Cardiff South West	Lansdowne Primary School	407	5	24	22
Cardiff South West	Mary Immaculate High School	789	24	76	69
Cardiff South West	Millbank Primary School	252	8	31	24
Cardiff South West	Pencaerau Primary School	257	6	27	26
Cardiff South West	Radnor Primary School	279	6	3	14
Cardiff South West	Riverbank School	69	69		
Cardiff South West	Severn Primary School	503	16	22	72
Cardiff South West	St Fagan's C.W Primary School	212	4	14	7
Cardiff South West	St Francis RC Primary School	352	12	25	15
Cardiff South West	St Mary's Catholic Primary School	246	2	18	17
Cardiff South West	Trelai Primary School	372	6	27	48
Cardiff South West	Ty Gwyn School	195	194	1	
Cardiff South West	Windsor Clive Primary School	443	15	65	99
Cardiff South West	Woodlands High School	139	139		
Cardiff South West	Ysgol Gymraeg Nant Caerau	245	4	20	4
Cardiff South West	Ysgol Gymraeg Pwll Coch	378	6		16
Cardiff South West	Ysgol Gymraeg Treganna	689	13	29	10
Total		10047	629	811	1042
% of all pupils: Any SEN; SEN Statement; SEN School Action; SEN School Action Plus		24.7	6.3	8.1	10.4

Table: Cardiff West: SEN Statement, SEN School Action and SEN School Action Plus

NPA	School	Total Pupils	SEN Statement	SEN School Action	SEN School Action Plus
Cardiff West	Bryn Deri Primary School	253	6	4	2
Cardiff West	Cantonian High School	844	49	77	104
Cardiff West	Coryton Primary School	221	5	9	9
Cardiff West	Creigiau Primary School	418	6	11	3
Cardiff West	Danescourt Primary School	473	7	13	69
Cardiff West	Fairwater Primary School	209	9	22	12
Cardiff West	Gabalfa Primary School	264	14	7	4
Cardiff West	Hawthorn Primary School	245	3	11	25
Cardiff West	Holy Family R.C Primary School	153	1	8	21
Cardiff West	Llandaff C.W. Primary School	416	5	17	28
Cardiff West	Meadowbank School	40	40		
Cardiff West	Pentrebane Primary School	226	25	17	24
Cardiff West	Pentyrch Primary School	143	1	2	2
Cardiff West	Peter Lea Primary School	351	5	7	14
Cardiff West	Radyr Comprehensive School	1290	15	42	97
Cardiff West	Radyr Primary School	464	8	9	1
Cardiff West	The Bishop Of Llandaff C.W High School	1239	84	8	94
Cardiff West	Tongwynlais Primary School	214	3	17	15
Cardiff West	Whitchurch High School	2416	118	74	38
Cardiff West	Whitchurch Primary School	710	20	36	10
Cardiff West	Ysgol Glan Ceubal	196	1	15	16
Cardiff West	Ysgol Gyfun Gymraeg Glantaf	1329	27	70	126
Cardiff West	Ysgol Gyfun Gymraeg Plasmawr	1146	14	69	79
Cardiff West	Ysgol Gymraeg Coed-Y-Gof	278	13	19	21
Cardiff West	Ysgol Gymraeg Melin Gruffydd	466	6	4	11
Cardiff West	Ysgol Gynradd Gwaelod Y Garth Primary School	282	4	8	22
Cardiff West	Ysgol Pencae	205	6	8	10
Total		14491	495	584	857
% of all pupils: Any SEN; SEN Statement; SEN School Action; SEN School Action Plus		13.4	3.4	4.0	5.9

Table: Children with SEN: Distribution classified need and by age

	PMED	ADHD	ASD	BESD	GLD	HI	MLD	PMLD	SLCD	SLD	VI	DYSL	DYSP	MSI	Other	Total
Nursery	2	0	4	0	0	0	0	0	12	1	1	0	0	0	61	81
Reception	12	0	24	7	2	1	3	1	37	3	3	0	0	0	30	123
Yr 1	20	0	38	4	8	0	0	0	39	3	2	0	0	1	18	133
2	23	0	56	16	4	2	0	0	57	3	0	0	0	1		162
3	16	0	47	31	8	6	0	1	48	4	2	0	0	0	1	164
4	13	4	55	27	18	1	0	1	38	5	3	0	1	0		166
5	20	2	51	40	26	3	0	1	33	5	3	0	0	0		184
6	29	9	51	51	29	2	1	1	34	10	2	1	0	0		220
7	20	9	68	48	31	5	0	0	24	7	3	2	0	0		217
8	37	7	58	61	24	5	0	2	21	8	2	1	0	0		226
9	23	8	58	63	23	5	0	2	19	14	6	0	1	0		222
10	30	9	67	61	17	3	0	1	16	13	5	2	0	0		224
11	31	8	41	52	12	8	1	4	25	17	4	3	0	0	1	207
12	25	3	40	26	15	1	1	2	19	20	0	8	0	0		160
13	16	1	43	13	5	2	1	1	11	16	1	0	0	1		111
Total	317	60	701	500	222	44	7	17	433	129	37	17	2	3	111	2600

Key

PMED	Physical and Medical Difficulties
ADHD	SPLD - Attention Deficit Hyper Activity Disorder
ASD	Autistic Spectrum Disorder
BESD	Behavioural, Emotional and Social Difficulties
GLD	General Learning Difficulties
HI	Hearing Impairment
MLD	Moderate Learning Difficulty
PMLD	Profound & Multiple Learn Difficulties
SLCD	Speech, Language, and Communication Difficulties
SLD	Severe Learning Difficulty
VI	Vision Impairment
DYSL	Dyslexia
DYSP	Dyspraxia
MSI	multi-sensory impairment

Distribution of Children with SEN

The distribution of children of primary school age with a SEN statement, or subject to School Action or School Action Plus varies considerably across the NPAs, from 12.7% in Cardiff North to 24.7% in Cardiff South West. Across all schools, there are 9,446 pupils with a SEN statement, or on School Action or School Action Plus, representing 16.6% of all pupils. This is a higher rate than reported by childcare providers, who

identified a total of 265 children “formally identified as having learning difficulties or disabilities”. This is 2.4% of the 10,828 children on childcare providers’ books. Childcare settings may not be informed by parents that a child has been “formally identified as having learning difficulties or disabilities” which would impact on reporting. It is also not clear whether a child being on SEN School Action or SEN School Action Plus would meet the criteria for being “formally identified as having learning difficulties or disabilities”.

The Index

The Index is the voluntary directory of children and young people with disabilities or additional needs maintained by Cardiff Family Advice and Support as part of the Councils Early Help response

(www.cardiffamilies.co.uk) . Parents and carers of a child or young person with a disability or additional need are invited to register on the database and are then provided with regular information about support services, activities and events. Registration on 'the Index' provides parents and carers with the opportunity to contribute to the planning and development of future services.

As of November 2021, registrations on the index could be summarised as shown below:

- 799 registrations in total

Primary Reason for Registration:

Autistic Spectrum Disorder	254
Behavioural/Emotional Difficulties	121
Communication/Socialisation Difficulties	29
Developmental Delay	137
Hearing Impaired	5
Learning Disability	82
Physical Disability/Chronic Illness	57
Speech/Language Difficulties	39
Visually Impaired	10
Other	65
Total	799

Early Years ALN

The table below shows the number of pre-school children across Cardiff that have an ALN as defined by the ALN Code.

Table: Pre-school children with ALN, by presenting need

ALN NEED	Number
Communication and Interaction	11
Cognition & Learning	11
Behaviour, Emotional and Social Development	0
Sensory and/or Physical	8
TOTAL (LA IDP)	30

The number of children that have been referred into the Early Forum that are on the active caseload and have an additional or emerging need and have not started attending nursery is **188**.

Ethnicity

The data below has been drawn from 2011 Census Key and Quick Statistics Profile. Please note that this data relates to individuals and not families.

	Cardiff	Wales
Total Usual residents	%	%
White	84.7	95.6
British	80.3	93.2
Irish	0.7	0.5
Gypsy or Irish Traveller	0.2	0.1
Other White	3.5	1.8
Mixed Ethnicity	2.9	1.0
White and Black Caribbean	1.1.	0.4
White and Black African	0.5	0.1
White and Asian	0.7	0.3
Other mixed	0.6	0.2
Asian	8.0	2.2
Indian	2.3	0.6
Pakistani	1.8	0.4
Bangladeshi	1.4	0.3
Chinese	1.2	0.4
Other Asian	1.3	0.5
Black	2.4	0.6
African	1.5	0.4
Caribbean	0.4	0.1
Other Black	0.5	0.1
Other Ethnic Groups	2.0	0.5
Arab	1.4	0.3
Other Ethnic Groups	0.6	0.2
Total	100.0	100.0

- A comparison of the ethnicity of the Cardiff population compared to the ethnicity of parental survey respondents can be found in chapter 8: *Understanding the needs of parents and carers*

5. Covid-19

Closures

It is important to recognise the significant role played by childcare providers throughout the Covid-19 pandemic, and as part of the Welsh Government's Response and Recovery model. The Coronavirus-Childcare Assistance Scheme (C-CAS), which supported key workers to deliver essential services was reliant on childcare providers maintaining provision and delivering childcare in a Covid safe manner. Childcare settings were provided with advice, support and practical assistance, including PPE, in order to ensure relevant legislation was met, guidance adhered to, and children, families and staff were kept as safe as possible. Cardiff Council would like to thank the sector for their commitment, hard work and courage over the past twenty months.

Table: Temporary closures, by provider type and NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Full Day care	18	5	10	5	13	12	73
Sessional Day Care	9	6	4	2	8	8	41
Out of School Care	15	0	5	1	6	11	38
Childminders	43	6	3	1	10	29	92
Open Access	0	0	1	0	0	0	1
Creche	0	0	0	0	1	0	1
Totals	85	17	13	9	38	60	232

Chart: Temporary closures, by provider type and NPA

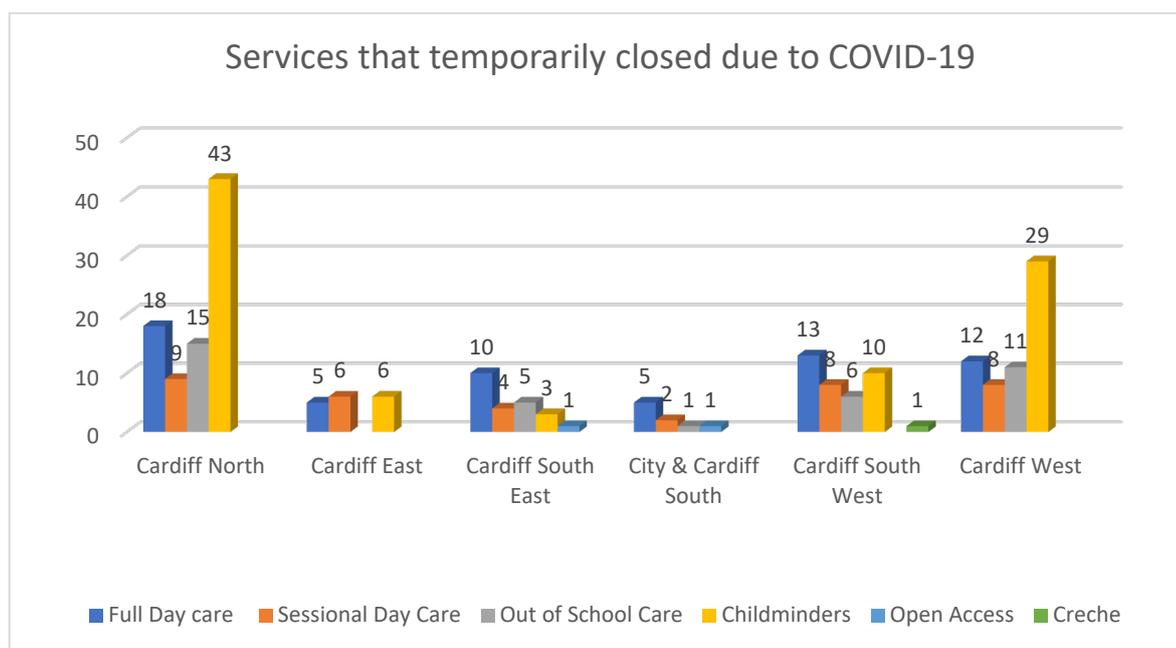


Table: providers experiencing temporary closure; %, NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Full day care	78.3	83.3	71.4	71.4	76.5	75.0	75.9
Sessional day care	100	86	80	100	100	100	94.9
Out of school	93.8	0	100	50	100	78.6	86.4
Childminders	55.8	50.0	23.1	14.3	37.0	59.2	49.7
Open access play	-	-	100	-	-	-	100
Creche	-	-	-	-	100	-	100

Chart: providers experiencing temporary closure, by provider type; %, NPA

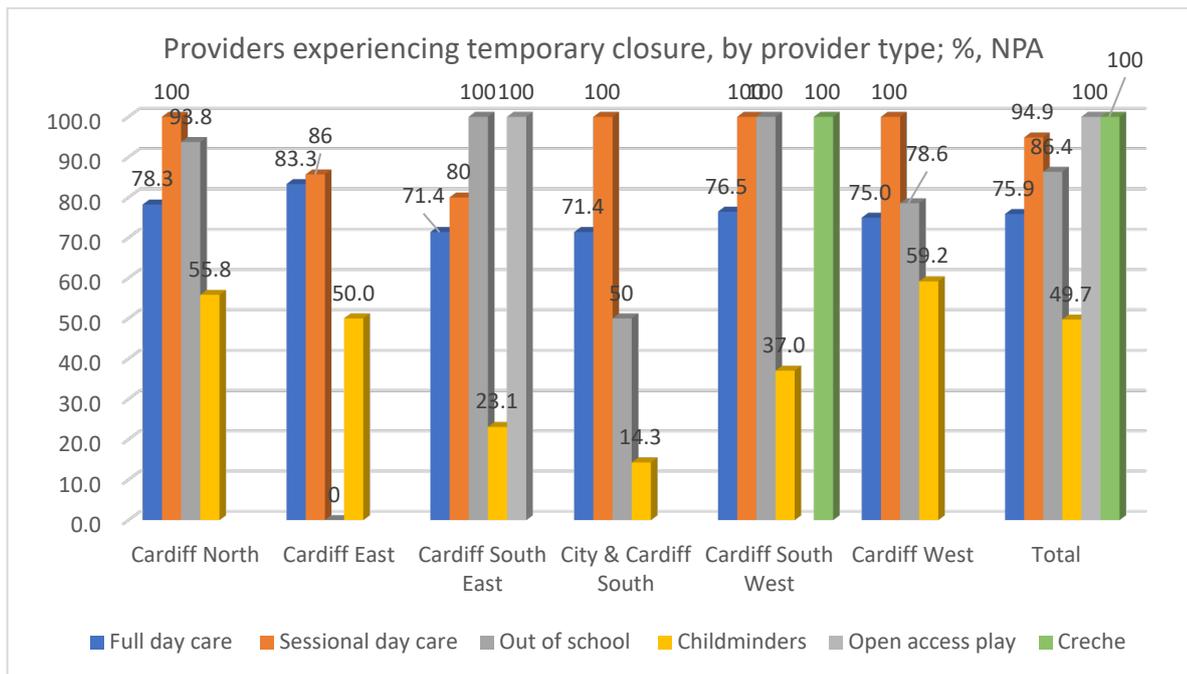
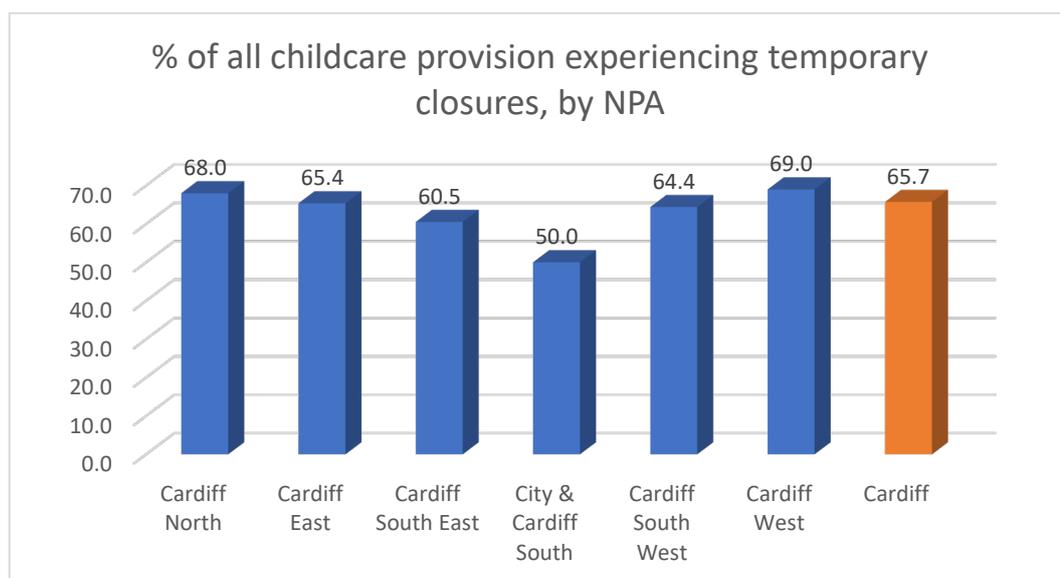


Table: % of all childcare provision experiencing temporary closures, by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Settings in NPA	125	26	38	18	59	87	353
Temporary closures	85	17	23	9	38	60	232
% of total	68.0	65.4	60.5	50.0	64.4	69.0	65.7

Chart: % of all childcare provision experiencing temporary closures, by NPA

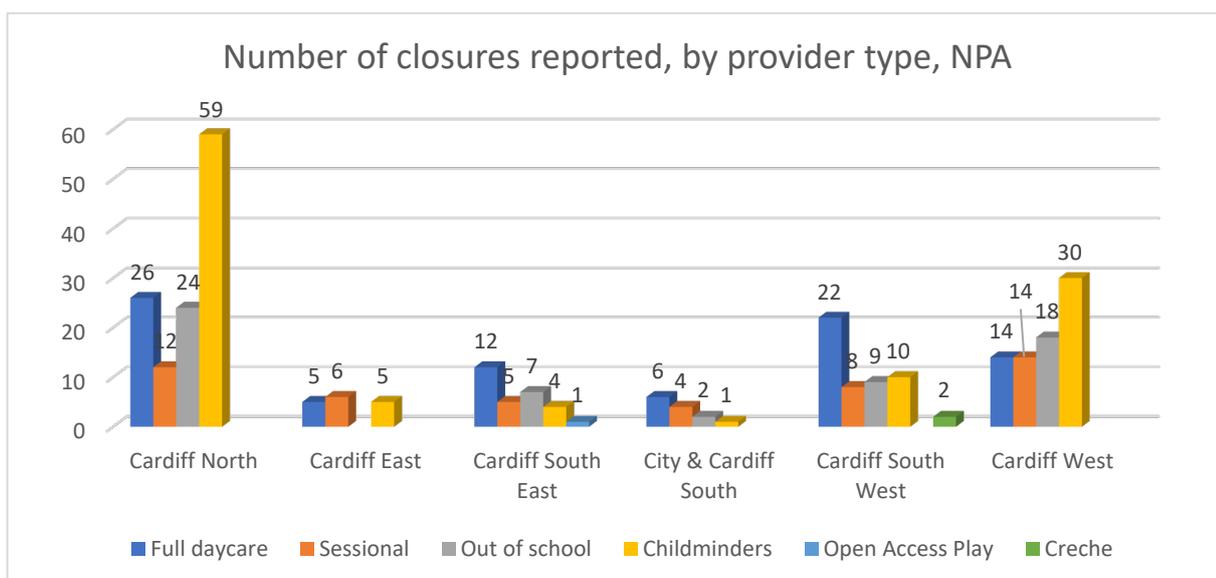


- The % of all childcare settings in an NPA that experienced a temporary closure varied from 60 of 87 settings in Cardiff West (69%) to 9 of 18 (50%) in City and Cardiff South
- Overall, 232 of 353 settings (65.7%) experienced at least one temporary closure due to Covid

Table: Number of closures reported, by provider type, NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Average number of closures per setting
Full daycare	26	5	12	6	22	14	1.2
Sessional	12	6	5	4	8	14	1.2
Out of school	24		7	2	9	18	1.6
Childminders	59	5	4	1	10	30	1.2
Open Access Play			1				1.0
Creche					2		2.0
Totals	121	16	29	13	51	76	1.3

Chart: Number of closures reported, by provider type, NPA,



- Across all provider types and NPAs, the average number of times a setting experienced a temporary closure was 1.3.
- The highest number of temporary closures was 4 (3 childminders in Cardiff North; 1 full daycare in Cardiff South West)

Table: Calendar days closed by provider type; duration – longest; shortest; mode

	Total calendar days closed across all providers	Longest closure	Shortest closure	Modal closure period
Full daycare	9,722	581	5	101
Sessional	5,876	475	14	98
Out of school	10,343	881	71	265
Childminders	14,159	3,736	4	98
Open Access Play	504	504	504	504
Creche	99	99	99	99

NB: The 3,376 day closure reported by a childminder commenced in March 2010 and ended in June 2020. It is not believed that this closure was Covid related. This data impacts on the total days lost for childminders, constituting nearly 24% of the total days lost

Chart: Calendar days closed by provider type

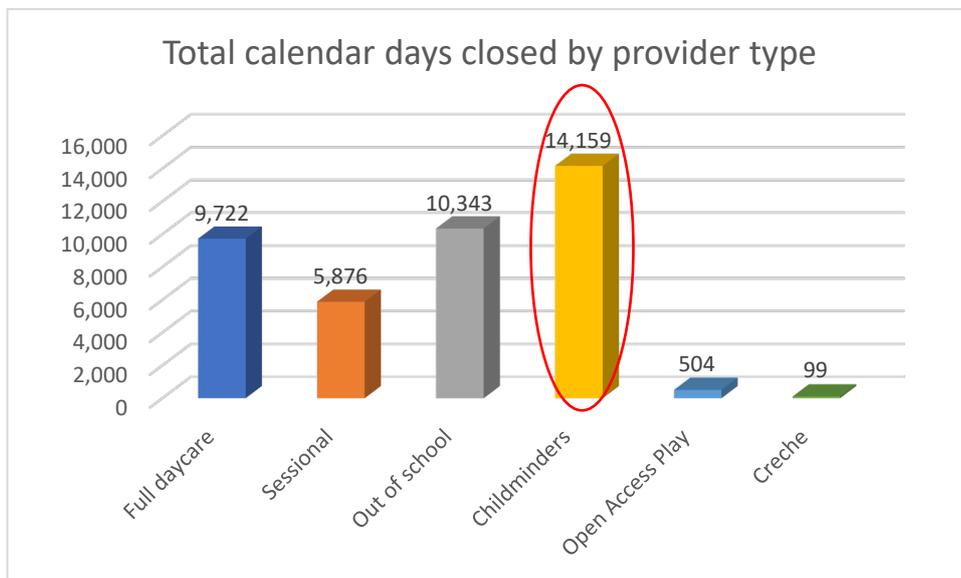
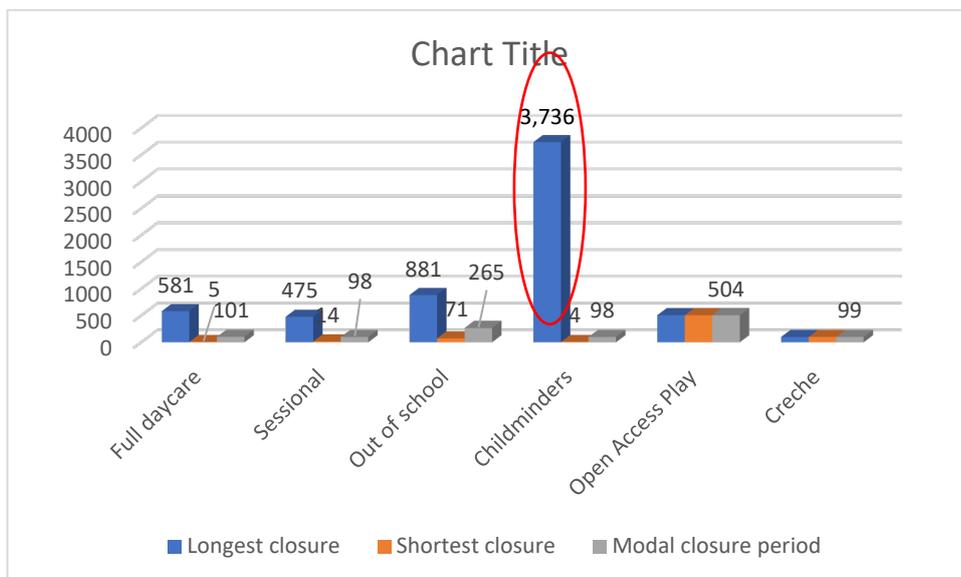


Chart: Duration of closure by provider type - longest; shortest; mode



- For full daycare, sessional day care and childminders, the modal closure period was around 100 days (101,98 and 99 days respectively). The same period was reported by the creche.
- Out of school care reported a higher modal duration of closure of 265 days. This is likely to be closely linked to the closure of schools, and of the requirements placed on schools when re-opening

Table: Settings closed at date of SASS return

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Full daycare	0	0	0	0	0	0	0
Sessional	0	0	0	0	0	0	0
Out of school	2	0	0	0	0	2	4
Childminders	0	0	0	0	0	1	1
Open Access Play	0	0	1	0	0	0	1
Creche	0	0	0	0	0	0	0
Total	2	0	1	0	0	3	6

- 4 out of school (2 in Cardiff North, 2 in Cardiff West) were closed at the time of the SASS return.
- 1 childminder in Cardiff West and the open access play setting also reported being closed at this time

Confirmed positive Covid-19 cases at setting; by provider type, NPA

Table: Confirmed positive Covid-19 cases at setting; by provider type, NPA

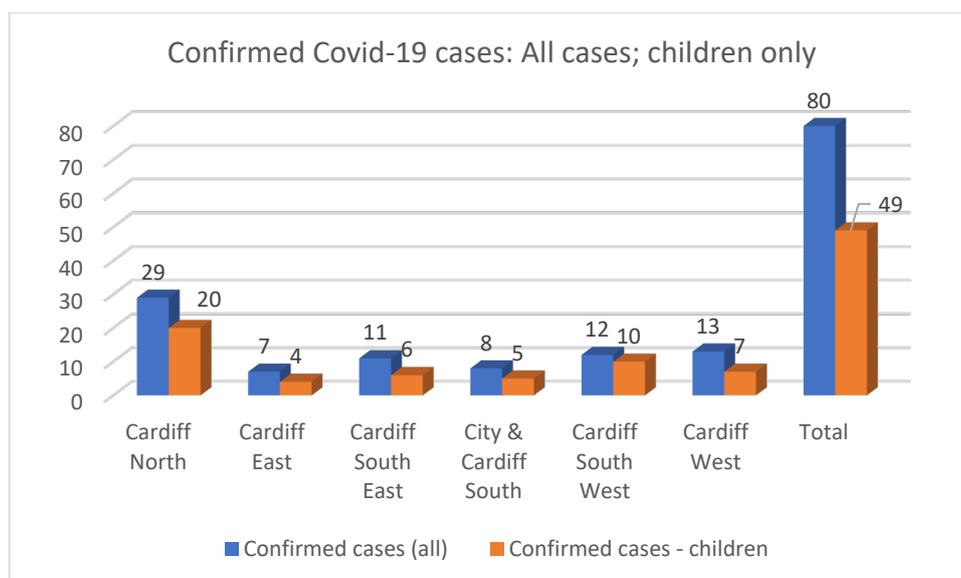
Confirmed cases	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Full Day care	11	3	8	3	8	4	37
Sessional Day Care	4	3	1	2	2	3	15
Out of School Care	3	0	0	0	1	1	5
Childminder	11	1	2	3	1	5	23
Total	29	7	11	8	12	13	80

Confirmed positive Covid-19 cases at setting – children only; by provider type, NPA

Table: Confirmed positive Covid-19 cases at setting; by provider type, NPA

Confirmed cases - children	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Full Day care	11	2	4	2	7	3	29
Sessional Day Care	3	2	1	2	2	3	13
Out of School Care	2	0	0	0	1	0	0
Childminder	4	0	1	1	0	1	7
Total (children only)	20	4	6	5	10	7	49
Total (all cases)	29	7	11	8	12	13	80
% of all cases related to children	69.0	57.1	54.5	62.5	83.3	53.8	61.3

Chart: Confirmed Covid-19 cases: All cases; children only



Confirmed cases by NPA; % of all children on books

Table: Confirmed cases by NPA; % of all children on books

Confirmed cases	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Cases	20	4	6	5	10	7	49
Children on books	3584	590	1336	820	1946	2552	10828
Cases as % of all children on books	0.6	0.7	0.4	0.6	0.5	0.3	0.5

- In total, 80 positive cases were reported by childcare settings
- Of these, 49 cases (61.3%) related to children. The % of cases relating to children ranged from 7 of 13 (53.8%) in Cardiff West to 10 of 12 cases in Cardiff South West.
- The % of children testing positive as a proportion of all children on all childcare providers' books, by NPA, is shown above. Across Cardiff, 0.5% of children on childcare providers' books were reported as testing positive via the SASS returns.

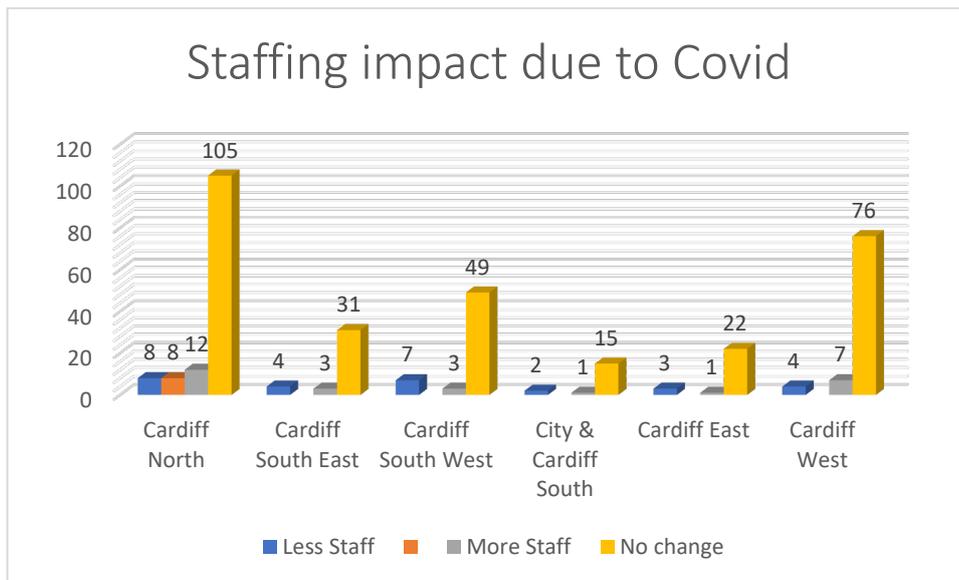
Covid-19: Impact on settings

Table: Has the pandemic impacted staffing ratios at the service?

Staffing impact	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total	%
Less Staff	8	3	4	2	7	4	28	7.9
More Staff	12	1	3	1	3	7	27	7.6
No change	105	22	31	15	49	76	298	84.4

- The majority of settings (298 of 353, 84%) reported no change to staffing ratios
- Of those that did, there was very little difference in the numbers reporting fewer staff (28, 7.9%) as reporting more staff (27, 7.6%)

Chart: Has the pandemic impacted staffing ratios at the service?

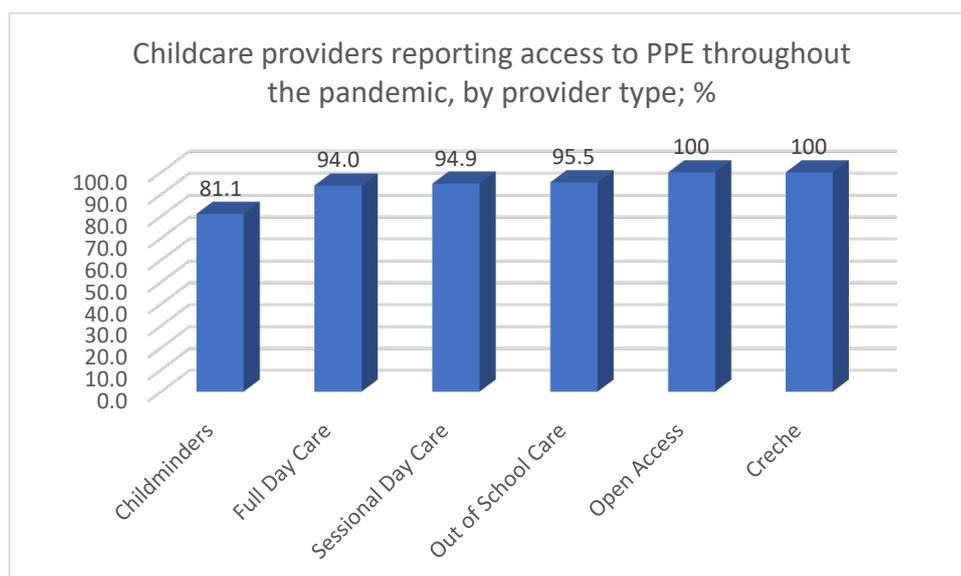


PPE

Table: Access to PPE throughout the pandemic

Access to PPE	Yes	
	Number	%
Childminders	150	81.1
Full Day Care	78	94.0
Sessional Day Care	37	94.9
Out of School Care	42	95.5
Open access play	1	100
Creche	1	100

Chart: Childcare providers reporting access to PPE throughout the pandemic, by provider type; %

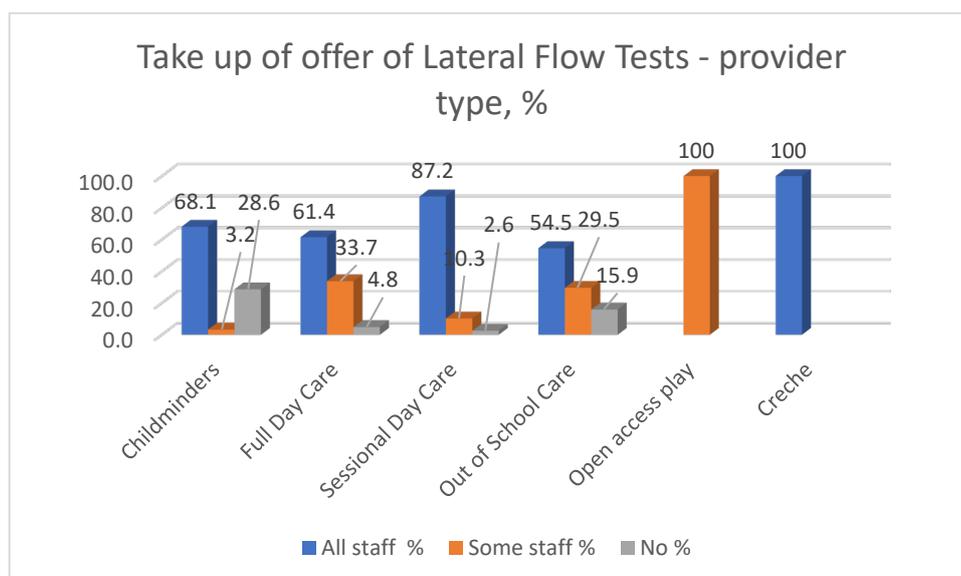


Lateral Flow Tests

Table: Take up of offer of Lateral Flow Tests – provider type, %

Access to LFT	All staff		Some staff		No	
	Number	%	Number	%	Number	%
Childminders	126	68.1	6	3.2	53	28.6
Full Day Care	51	61.4	28	33.7	4	4.8
Sessional Day Care	34	87.2	4	10.3	1	2.6
Out of School Care	24	54.5	13	29.5	7	15.9
Open access play	-	-	1	100	-	-
Creche	1	100	-	-	-	-

Chart: Take up of offer of Lateral Flow Tests - provider type, %



- Lateral flow tests were taken by all staff at 34 of 39 sessional care settings (87.2%) and 51 of 83 full daycare settings (61.4%), and by some staff at a further 4 (103%) and 28 settings (33.7%).
- 126 childminders (68.1%) reported 'all staff' taking the tests, with 6 reporting 'some staff', although it is unclear if this refers to assistants or other household or family members.

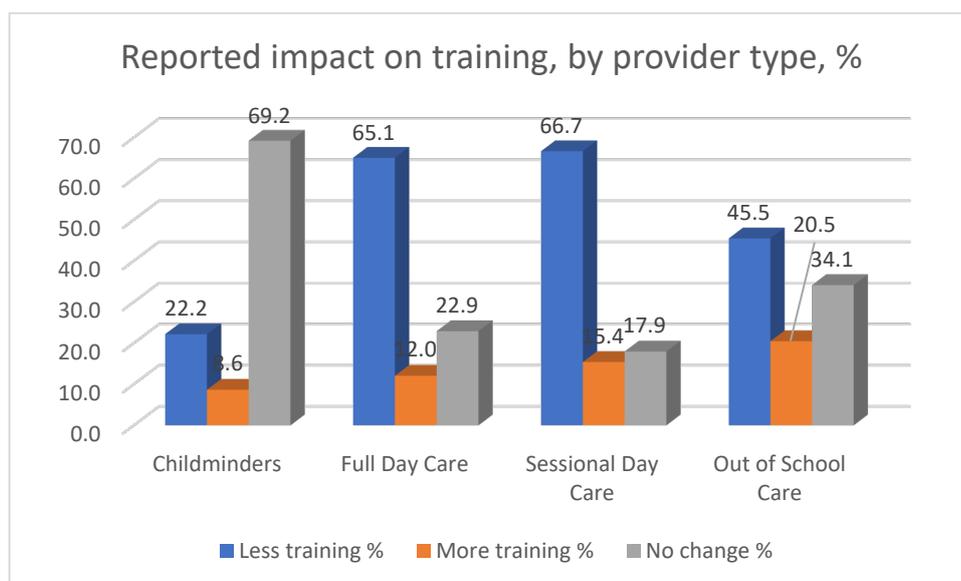
NB: lateral flow tests were delivered free to all smaller childcare settings and childminders on request by Cardiff Council

Impact on training

Table: reported impact on training, by provider type, number, %

Impact on training	Less training		More training		No change	
	Number	%	Number	%	Number	%
Childminders	41	22.2	16	8.6	128	69.2
Full Day Care	54	65.1	10	12.0	19	22.9
Sessional Day Care	26	66.7	6	15.4	7	17.9
Out of School Care	20	45.5	9	20.5	15	34.1

Chart: reported impact on training, by provider type, %



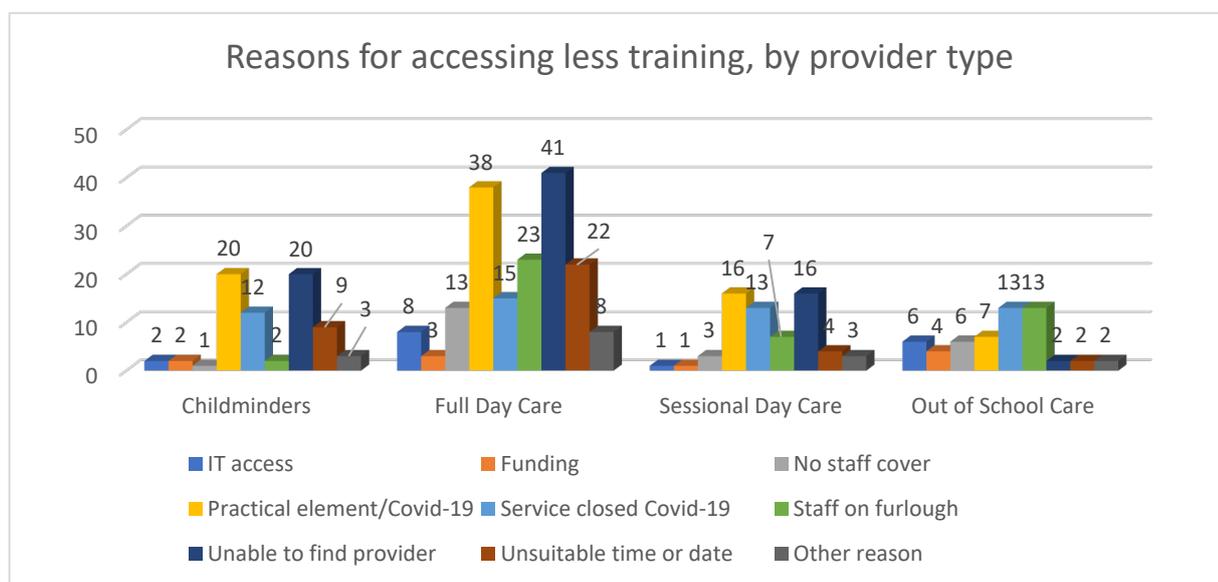
- The greatest reduction in training was reported by sessional day care (26 of 39 settings, 66.7%) and full daycare (54 of 83 settings, 65.1%)
- The greatest increase in training was reported by out of school care (6 settings, 20.5%)
- There was least change shown by childminders, with 69.2% (128) reporting no change to the amount of training they accessed

Reasons for accessing less training

Table: Reasons for accessing less training

	IT access	Funding	No staff cover	Practical element/Covid-19	Service closed Covid-19	Staff on furlough	Unable to find provider	Unsuitable time or date	Other reason
Childminders	2	2	1	20	12	2	20	9	3
Full Day Care	8	3	13	38	15	23	41	22	8
Sessional Day Care	1	1	3	16	13	7	16	4	3
Out of School Care	6	4	6	7	13	13	2	2	2

Chart: Reasons for accessing less training, by provider type



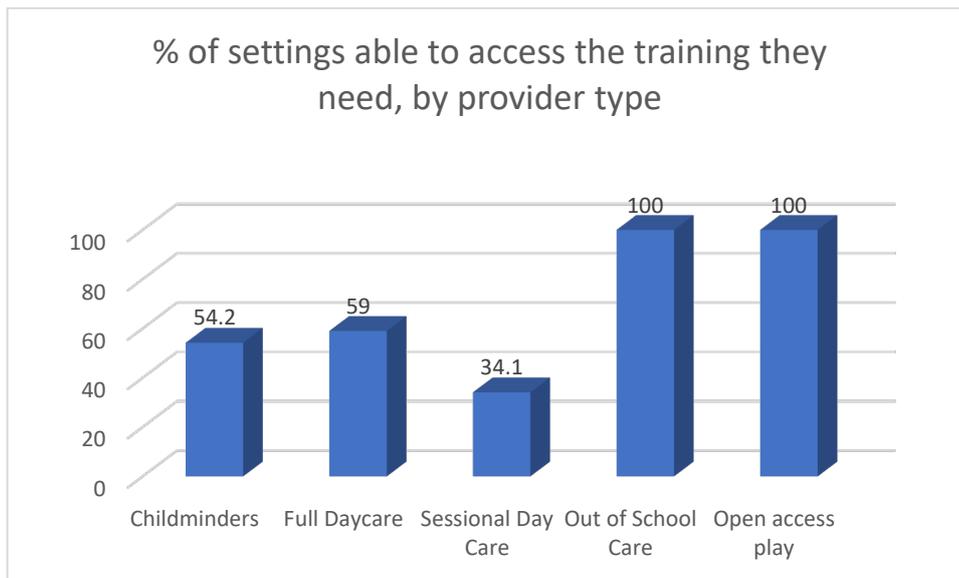
- The most common reason given by childminders (20) full daycare (41) and sessional day care (16) was “Unable to source training provider/Suitable training not on offer”. This is despite the training programme offered by Early Help’s Workforce Development (see: chapter 15: *Workforce Development and Training*)
- Lack of suitable It was only identified by 8 full daycare, 6 out of school, 2 childminders and 1 sessional day care setting. This would suggest most settings have access to suitable IT to access online training.

Access to training

Table: Number and % of settings able to access the training they need, by provider type

	Yes	
	Number	%
Childminders	177	95.7
Full Daycare	45	54.2
Sessional Day Care	23	59.0
Out of School Care	15	34.1
Open access play	1	100
Creche	1	100

Chart: % of settings able to access the training they need, by provider type



- 100% of open access play and creches (one of each provider type), and 95.7% of childminders reported being able to access all the training they need. This drops to 59% for sessional day care, 54.2% for full daycare and 34.1% for out of school

Reasons for being unable to access the training needed:

Table: Reasons for being unable to access the training needed, by provider type

	IT access	Funding	No staff cover	Practical element/Covid-19	Service closed Covid-19	Staff on furlough	Unable to find provider	Unsuitable time or date	Other reason
Childminders	1	1	0	4	1	0	3	1	0
Full Day Care	1	2	3	3	0	1	6	4	0
Sessional Day Care	0	0	2	1	1	1	2	2	0
Out of School Care	0	1	0	2	0	1	4	0	0

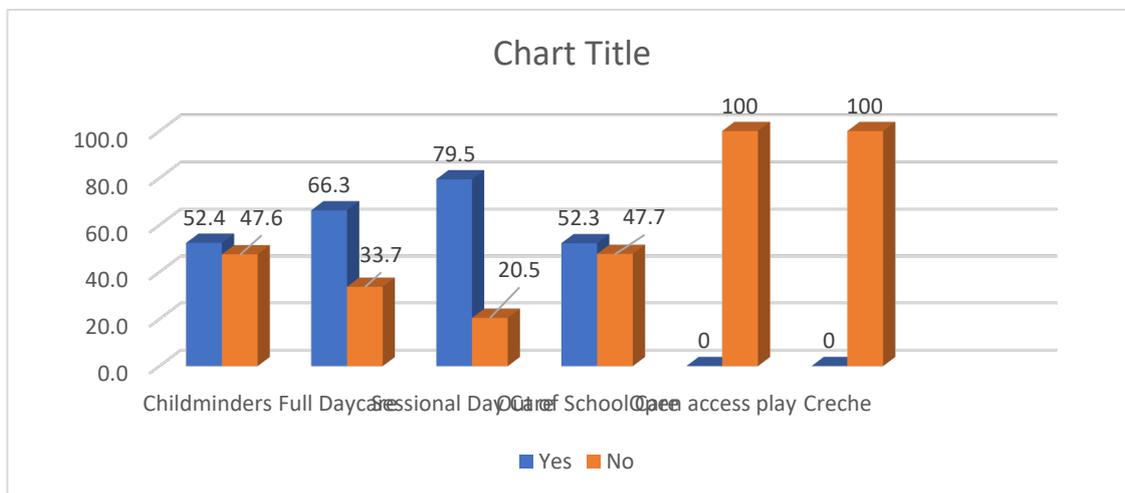
- As with access to training during the Covid-19 pandemic, the reason “unable to find provider/suitable training not on offer” was the most common mentioned, despite the training programme offered by Early Help’s Workforce Development (see: chapter 15: *Workforce Development and Training*)

Number and % of providers reporting “able to access specific Infection Prevention Control (IPC) training

Table: Number and % of providers reporting “able to access specific Infection Prevention Control (IPC) training, by provider type

	Yes		No	
	Number	%	Number	%
Childminders	97	52.4	88	47.6
Full Day Care	55	66.3	28	33.7
Sessional Day Care	31	79.5	8	20.5
Out of School Care	23	52.3	21	47.7
Open access play	0	-	1	100
Creche	0	-	1	100

Table: % of providers reporting “able to access specific Infection Prevention Control (IPC) training, by provider type



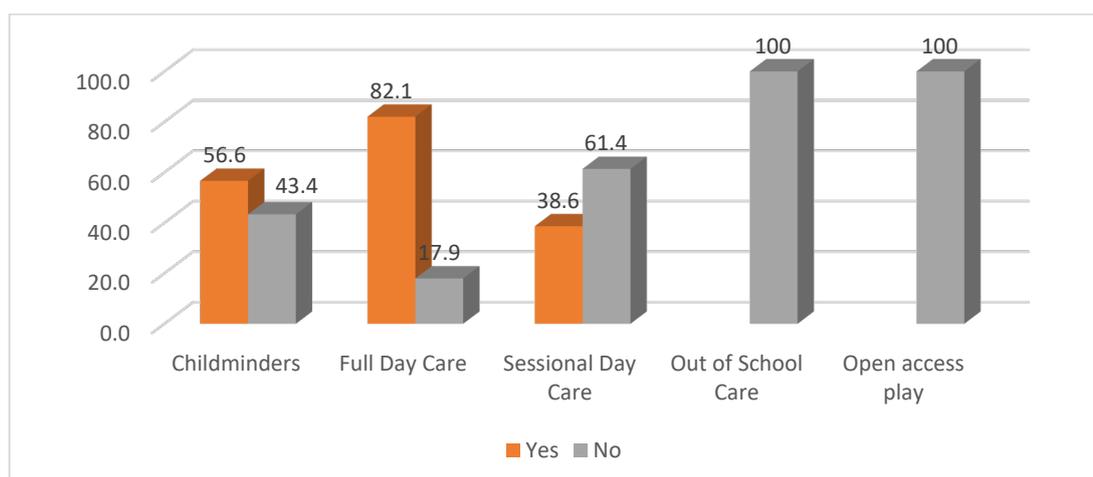
- Over half of all provider types reported that 50% of more (52.3% for sessional - 79.5% for full daycare) had been able to access specific Infection Prevention Control (IPC) training.
- Cardiff Council’s Workforce Development made a specific “Infection Prevention Control” eModule available to all registered childcare settings for a cost of £5.00 and provided details of how to access this training to all childcare settings.

Operating at full capacity

Table: Settings operating at full capacity, by provider type

	Yes		No	
	Number	%	Number	%
Childminders	109	58.9	76	41.1
Full Day Care	47	56.6	36	43.4
Sessional Day Care	32	82.1	7	17.9
Out of School Care	17	38.6	27	61.4
Open access play	0	0	1	100
Creche	0	0	1	100

Chart: Settings operating at full capacity, by provider type



NB: It is not possible to tell from the above data:

- How many fewer places, or hours, the service has been reduced by
- The duration of the reduction
- Whether it affects all services offered by a provider
- The cause of the reduction in capacity – reduced demand; lack of access to staff; space or safety requirements; etc.

Amongst the actions taken to support childcare providers during the Covid-19 pandemic by Cardiff Council's Childcare Business Support Team was the development of *Unlocking Childcare in Cardiff*

[Unlocking-childcare-in-Cardiff-14.8.2020.pdf \(cardiffamilies.co.uk\)](https://cardiffamilies.co.uk/Unlocking-childcare-in-Cardiff-14.8.2020.pdf)

6. Overview –Childcare Types, Services and Places

The following data tables and charts are based on data collected via SASS. A total of 353 registered settings returned data.

Table: Registered providers by type and NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Full daycare	23	6	14	7	17	16	83
Sessional	9	7	5	2	8	8	39
Out of school	16	1	5	2	6	14	44
Childminders	77	12	13	7	27	49	185
Open Access Play			1				1
Creche					1		1
Total	125	26	38	18	59	87	353

Chart: Registered providers by type and NPA

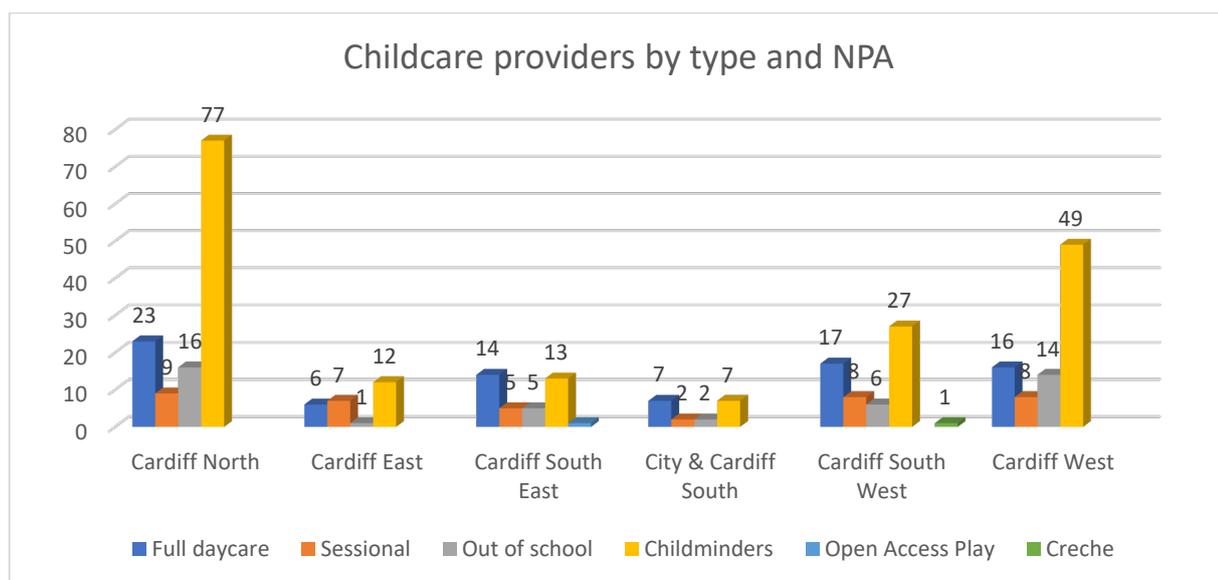
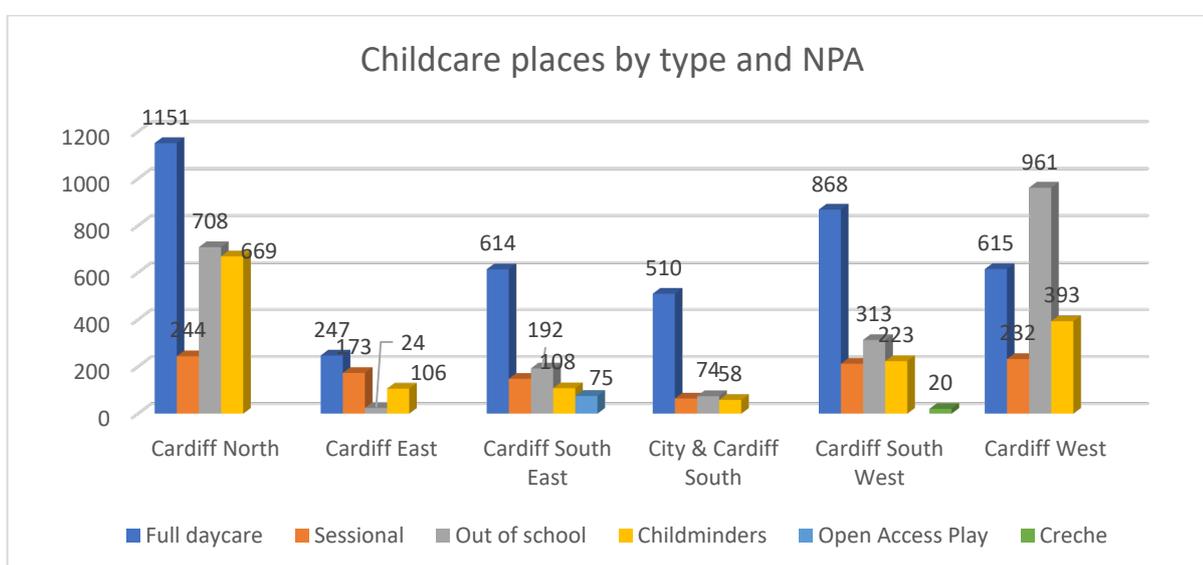


Table: Registered places by type and NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Full daycare	1151	247	614	510	868	615	4005
Sessional	244	173	148	64	212	232	1073
Out of school	708	24	192	74	313	961	2272
Childminders	669	106	108	58	223	393	1557
Open Access Play			75				75
Creche					20		20
	2772	550	1137	706	1636	2201	9002

Chart: Registered places by type and NPA



- The number of registered settings ranges from 18 settings providing 706 places in City & Cardiff South to 125 settings providing 2,772 places in Cardiff North.

Numbers of children aged 0 – 14 compared to registered childcare places by NPA

Table: Numbers of children aged 0-14 compared to registered childcare places by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West
Population Aged 0-14	18,256	8,479	8,038	6,176	11,993	11,322
Total number of registered places	2,772	550	1,137	706	1,636	2,201
Number of children aged 0-14 per registered childcare place	6.6	15.4	7.1	8.7	7.3	5.1

Chart: Numbers of children aged 0-14 compared to registered childcare places by NPA

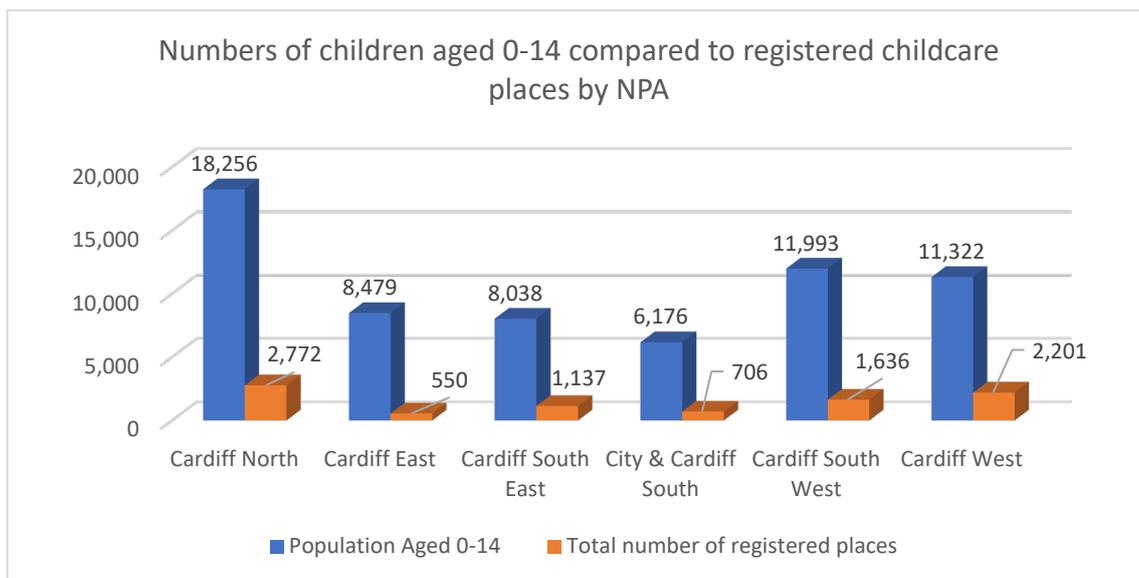
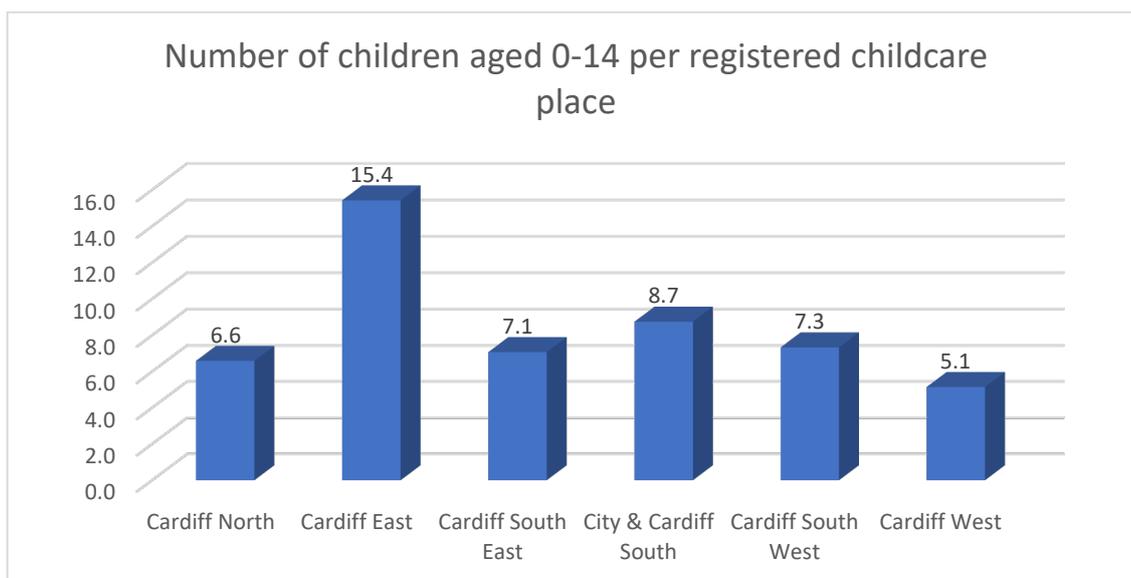


Chart: Number of children per registered childcare place by NPA



NB: Comparing the total child population aged 0-14 to the number of registered childcare places to calculate numbers of children per place should be seen as a high-level proxy measure across NPAs. It does not take into account parental demand, parental preference for type of setting, availability of vacant childcare places, type and language of provision, etc.

Action: Given the largest disparity between registered childcare places and numbers of children aged 0-14 exists in Cardiff East, a further investigation of the local factors influencing demand and supply will be undertaken. If required, a local action plan will be developed.

Care Inspectorate Wales (CIW) data: Registrations 2016 - 2021

Comparison of numbers of CIW registered providers and places annually, from 31.03.2016 to 31.03.2021

Table: CIW registrations by provider type 2016 - 2021

	31-03-2016 Providers	31-03-2017 Providers	31-03-2018 Providers	31-03-2019 Providers	31-03-2020 Providers	31-03-2021 Providers
Full Day Care	65	68	72	77	86	87
Sessional Day Care	61	63	57	48	46	45
Out of School Care	50	48	50	53	54	52
Child Minder	304	300	283	275	262	255
Open Access Play Provision	7	4	4	3	3	2
Creche	5	6	5	5	5	4
Total	492	489	471	461	456	445

Chart: CIW registrations by provider type 2016 - 2021

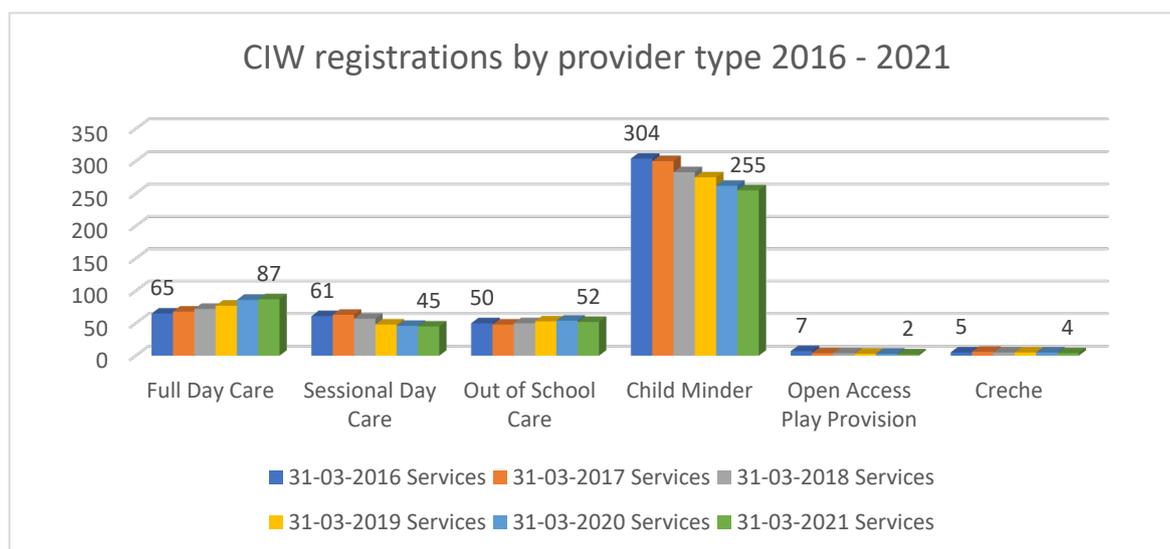


Table: CIW registrations: registered places by provider type 2016 - 2021

	31-03-2016 Places	31-03-2017 Places	31-03-2018 Places	31-03-2019 Places	31-03-2020 Places	31-03-2021 Places
Full Day Care	3,221	3,315	3,490	3,589	4,031	4,177
Sessional Day Care	1,664	1,713	1,567	1,307	1,214	1,205
Out of School Care	2,101	2,112	2,231	2,421	2,654	2,492
Child Minder	2,059	2,255	2,180	2,163	2,132	2,071
Open Access Play Provision	235	280	280	210	210	145
Creche	118	128	97	97	97	57
Total	9,398	9,803	9,845	9,787	10,338	10,147

Chart: CIW registrations: places by provider type 2016 - 2021

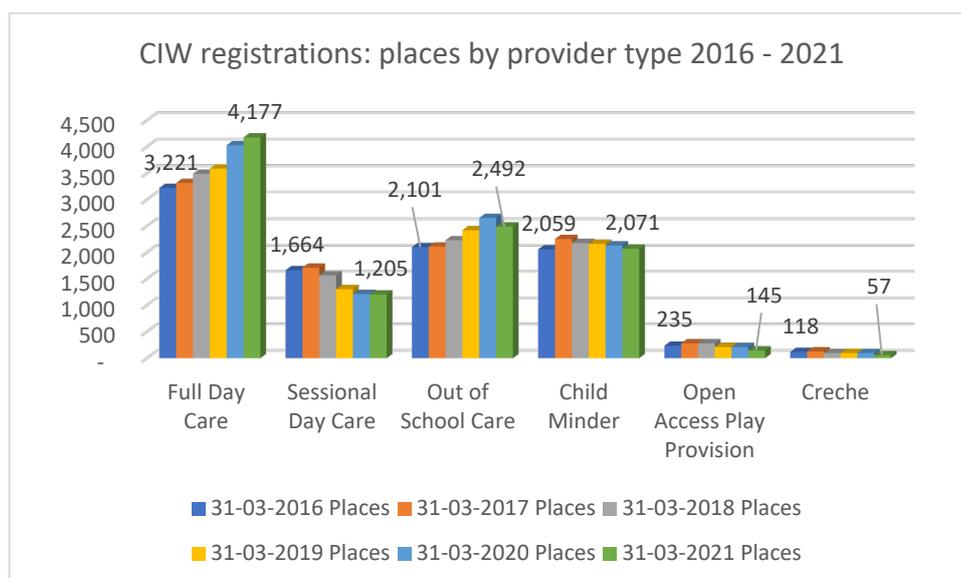


Table: Change in registrations by provider type and registered places 31.03.2016 – 31.03.2021

	Providers	Places
Full Day Care	+22	+956
Sessional Day Care	-16	-459
Out of School Care	+2	+391
Child Minder	-49	+12
Open Access Play Provision	-5	-90
Creche	-1	-61
	-47	+749

The next section shows data on changes in registration between 31.03.2021 and week commencing 07.06.2021, which was the first week covered by the SASS data returns.

Table: CIW registrations: registrations by provider type 31.03.2021 – 07.06.2021

	31-03-2021 Providers	07/06/2021 Providers
Full Day Care	87	87
Sessional Day Care	45	43
Out of School Care	52	50
Child Minder	255	234
Open Access Play Provision	2	1
Creche	4	2
Total	445	417

Chart: CIW registrations: registrations by provider type 31.03.2021 – 07.06.2021

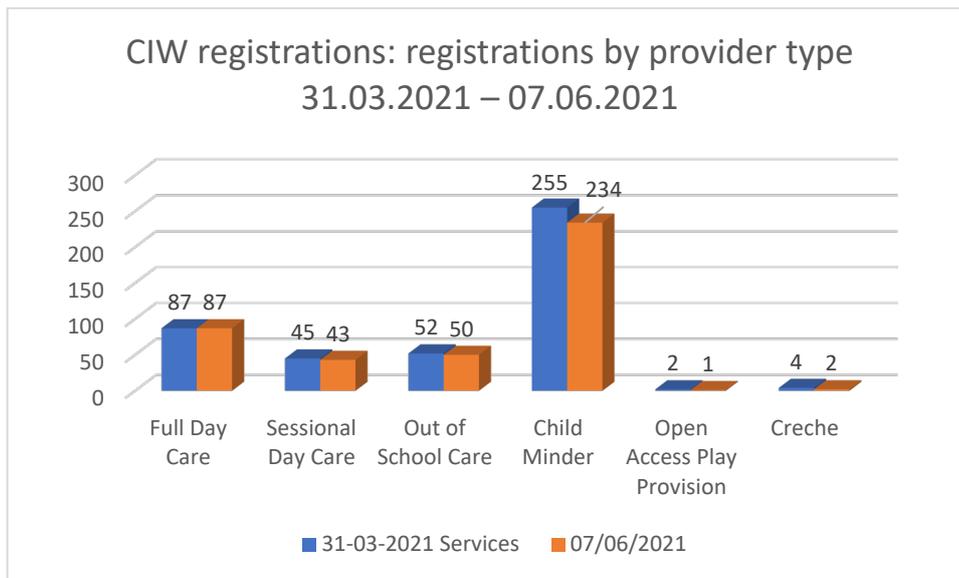


Table: CIW registrations: registered places by provider type 31.03.2021 – 07.06.2021

	31-03-2021 Places	07/06/2021 Places
Full Day Care	4,177	4,181
Sessional Day Care	1,205	1,169
Out of School Care	2,492	2,452
Child Minder	2,071	1,920
Open Access Play Provision	145	75
Creche	57	30
Total	10,147	9,827

Chart: CIW registrations: registered places by provider type 31.03.2021 – 07.06.2021

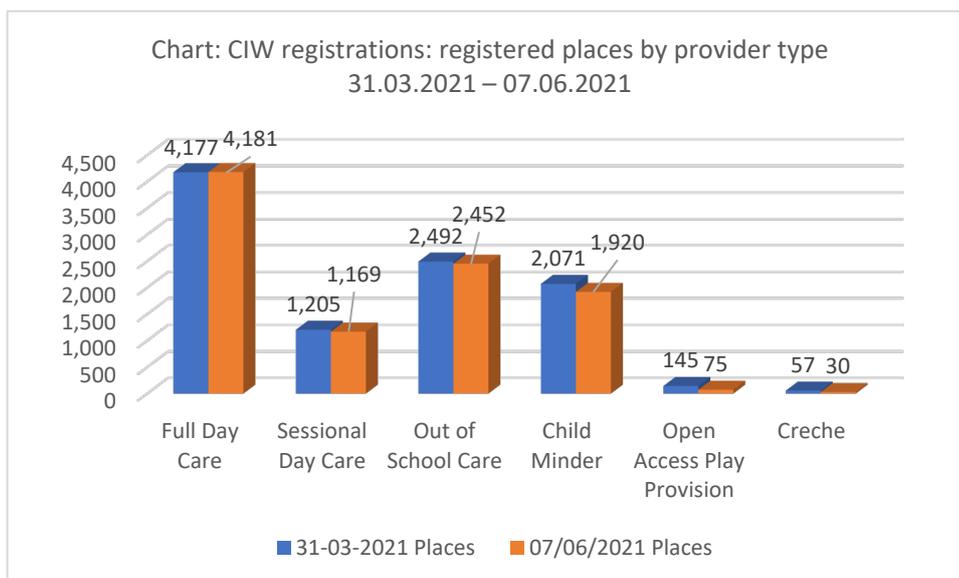


Table: Change in registrations by provider type and registered places 31.03.2021 – 07.06.2021

	Providers	Places
Full Day Care	-	+4
Sessional Day Care	-2	- 36
Out of School Care	-2	- 40
Child Minder	-21	- 151
Open Access Play Provision	-1	- 70
Creche	-2	- 27
Total	-28	-320

Change 31.03.2016 – 31.01.2021

- By the end of the period 31.03.2016 to 31.03.2021, CIW recorded a net reduction in registered settings of 47. 49 childminders, 16 sessional day care, 5 open access play and 1 creche registration ceased, but 22 new full daycare registrations and 1 out of school registration were reported.
- Despite this, and a reduction of registered sessional day care places (459) and open access play and creche places (90 and 61 respectively), the increases in full daycare, out of school and childminder places* led to net increase in places of 749.
- *The data on childminder registrations and places suggests the average number of places per childminder increased from $2,059/304 = 6.8$ places per setting, to $2,071/255 = 8.1$ places per setting between 2016 and 2021. This could be due to more childminders increasing their maximum registered number of places to 10 (permissible under the National Minimum Standards). It should be noted that due to childminders' own children, and the ages of children cared for, although registered for a maximum of 10 children, many childminders would not be able to fill all 10 places.

Table: Change 31.03.2021 – 07.06.2021

	Providers	Places
Full Day Care	-	+4
Sessional Day Care	-2	- 36
Out of School Care	-2	- 40
Child Minder	-21	- 151
Open Access Play Provision	-1	- 70
Creche	-2	- 27
Total	-28	-320

- Between 31.03.2021 and 07.06.2021 CIW reported a reduction of 28 settings, and 320 places.
- This reduces the net gain in places in the period 31.03.2016 to 07.06.2021 to 429
- The greatest reduction in places was in childminding (151), with 21 childminders ceasing registration in the period (compare to 49 in the 5 previous years).

- This issue is not specific to Cardiff, as all-Wales CIW data show a reduction by 15% in registered childminders, from 1,729 in March 2020, to 1,504 in November 2021, leading to a 13% reduction in places (1,607 places). The loss in Cardiff of 21 childminders between March 2020 and June 2021 equates to a loss of 10.6% of childminder registrations and 9.9% of registered childminder places of the all Wales percentages.

Welsh medium provision

The following section provides information on the number and percentage of childcare settings and registered places provided by childcare providers who indicated that Welsh was the main language of their provision. It does not include settings who responded 'Both'.

Table: Number and % of providers and registered places where Welsh is the main language, by provider type.

	Total Settings	Welsh	Total Registered Places	Welsh
Childminders	185	4	1,557	36
%		2.2		2.3
Full daycare	83	13	4,005	416
%		15.7		10.4
Sessional	39	4	1,073	92
%		10.3		8.6
Out of school	44	5	2,272	319
%		11.4		14.0
Open access play	1	0	75	0
%		0		0.0
Creche	1	0	20	0
%		0		0
Total number	353	26	9,002	863
Total %		7.4		9.6

Chart: Number and % of providers where Welsh is the main language, by provider type.

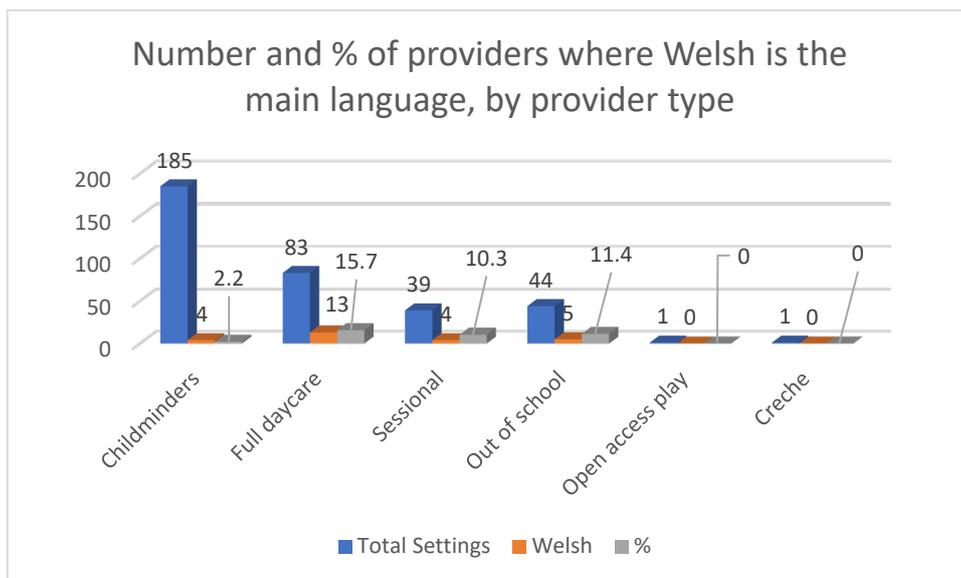
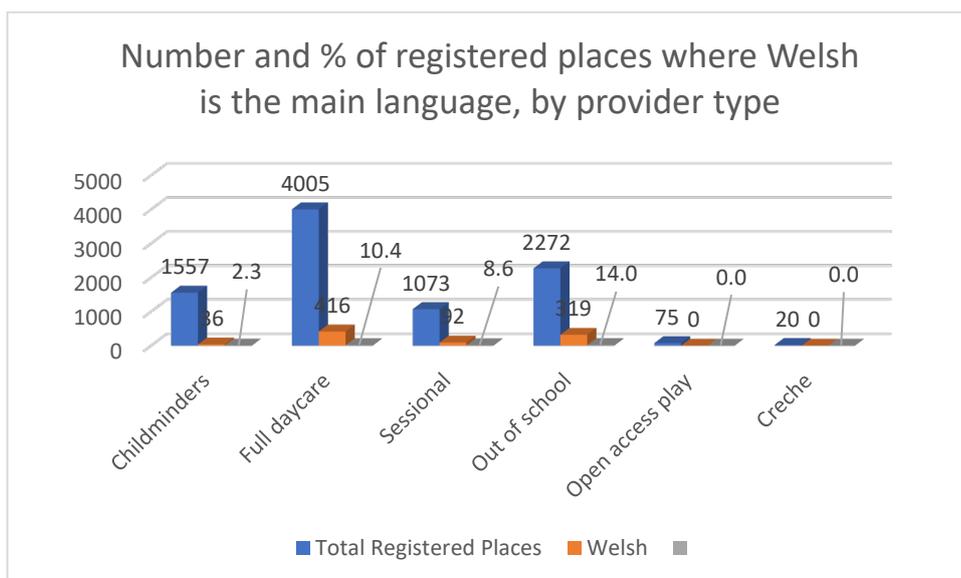


Chart: Number and % of registered places where Welsh is the main language, by provider type.



- 26 of the 353 settings indicated Welsh as their main language. This represents 7.4% of all settings. 863 of the 9,002 registered places were delivered by Welsh medium provision, representing 9.6% of registered places.
- The highest percentage of Welsh medium settings are registered as full daycare (13 of 83 settings) and the lowest are childminders (4 of 185, 2.2%), and creche and open access play (one setting of each type, both English provision)
- However, the highest percentage of Welsh medium registered places are offered by Out of school provision, with 319 of 2,272 places (14%), followed by full daycare (416 of 4,005 places, 10.4%)

Children on registered providers' books, by type, age and attendance type

There are discrepancies in data supplied regarding children on registered providers' books when comparing the breakdown of children by age with the breakdown of children by attendance type. Whilst 10,828 children were identified as being on the books by attendance type, 10,951 children are reported when broken down by age.

It is noted that some settings have reported children of ages uncommon for their type of setting on their books (e.g., out of school settings reporting children aged 0-2; sessional care reporting children aged 5-17) it is therefore not possible to identify which, if either, of these figures are correct.

Definitions

The following definitions were provided as guidance to registered providers completing the SASS. However, it is not possible to ascertain how closely these categories were followed.

Full Time i.e., books to attend all sessions relevant to them during the week e.g. using your "full day care" or "after school service" every day of the week

Part Time i.e. books to attend some available sessions relevant to them during the week e.g. using your "full day care" or "after school service" on a Monday, Tuesday and Wednesday only. Sessions are booked well in advance and there is an established pattern of attendance.

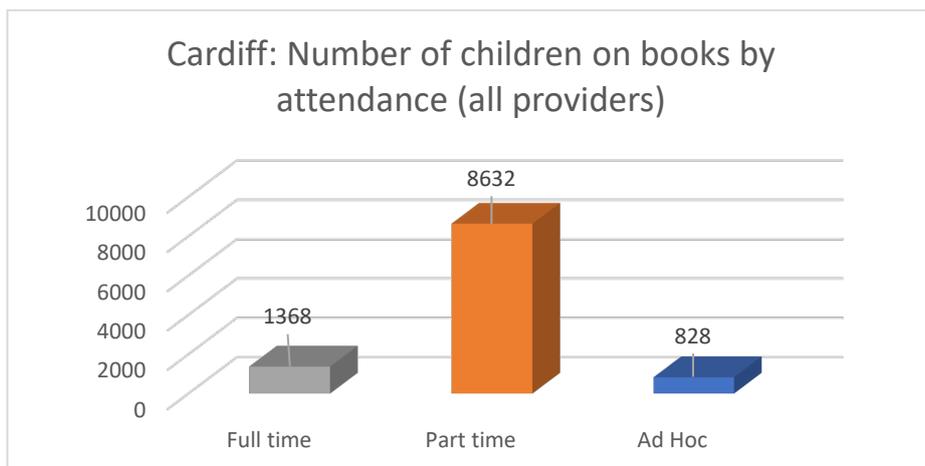
Ad-hoc i.e. there is no set pattern to attendance e.g. using your "full day care" or "after school service" as and when parent's working pattern requires.

Attendance type

Table: Children on books by attendance type (all providers; all NPAs)

Attendance type	Number of children
Full time	1,368
Part time	8,632
Ad Hoc	828
Total	10,828

Chart: Children on books by attendance type (all providers; all NPAs)

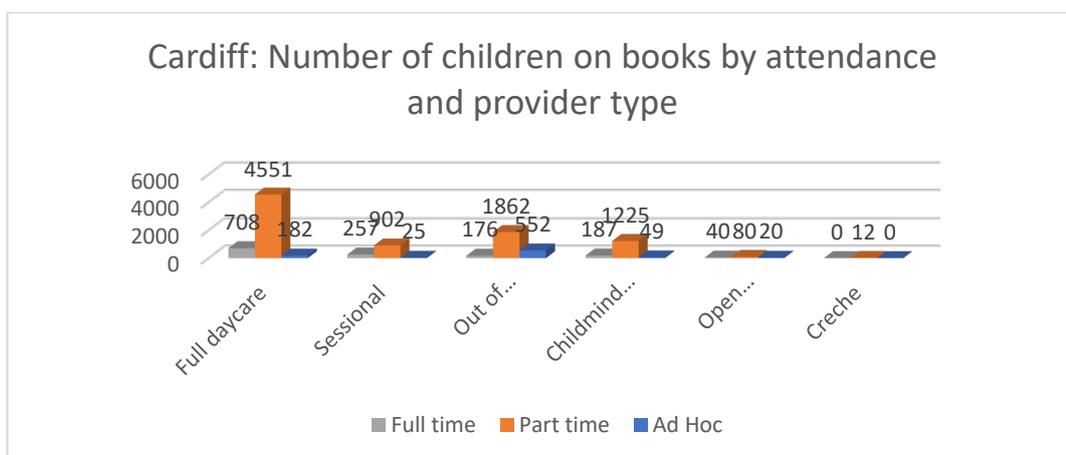


The following tables and charts provide a breakdown of children on the books by attendance and provider type for all of Cardiff.

Table: Cardiff: Number of children on books by attendance and provider type

Cardiff	Full time	Part time	Ad Hoc	Total
Full daycare	708	4551	182	5441
Sessional	257	902	25	1184
Out of school	176	1862	552	2590
Childminders	187	1225	49	1461
Open Access Play	40	80	20	140
Creche	0	12	0	12
Total	1368	8632	828	10828

Chart: Cardiff: Number of children on books by attendance and provider type



NB: NB: This figure does not match the total number of children on the books by attendance type (10,951). There are 128 fewer children reported by attendance type than by age.

Summary

The largest proportion of children attending registered childcare in Cardiff attend on a part-time basis, i.e. children are booked to attend some available sessions relevant to them during the week e.g. using “full day care” or “after school service” on a Monday, Tuesday and Wednesday only. Sessions are booked well in advance and there is an established pattern of attendance. This is the case across all types of provision, as can be seen from the table and chart above, and across all NPAs apart from for sessional care in Cardiff South East, where 92 children attend full time, and 75 children attend part time.

The following tables and charts provide a breakdown of children on the books by provider type, attendance type and NPA.

Table: Cardiff North: Number of children on books by attendance and provider type

Cardiff North	Full time	Part time	Ad Hoc
Full daycare	246	1434	20
Sessional	41	194	25
Out of school	58	843	91
Childminders	107	498	27
Total	452	2969	163

Chart: Cardiff North: Number of children on books by attendance and provider type

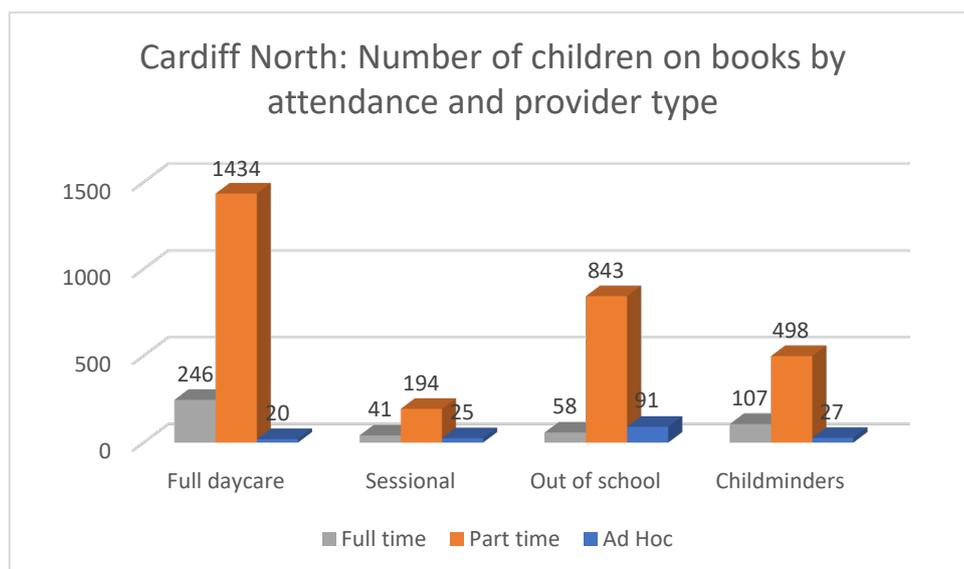


Table : Cardiff East: Number of children on books by attendance and provider type

Cardiff East	Full time	Part time	Ad Hoc
Full daycare	54	235	26
Sessional	63	108	0
Out of school	6	11	0
Childminders	10	75	2
Total	133	429	28

Chart: Cardiff East: Number of children on books by attendance and provider type

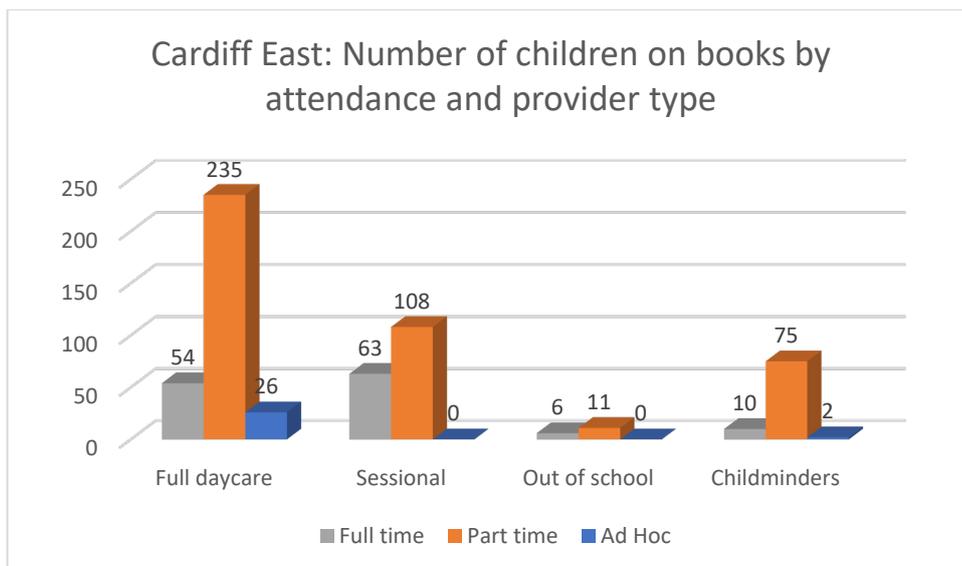


Table: Cardiff South East: Number of children on books by attendance and provider type

Cardiff South East	Full time	Part time	Ad Hoc
Full daycare	106	609	17
Sessional	92	75	0
Out of school	15	168	23
Childminders	4	81	6
Open Access Play	40	80	20
Total	257	1013	66

Chart: Cardiff South East: Number of children on books by attendance and provider type

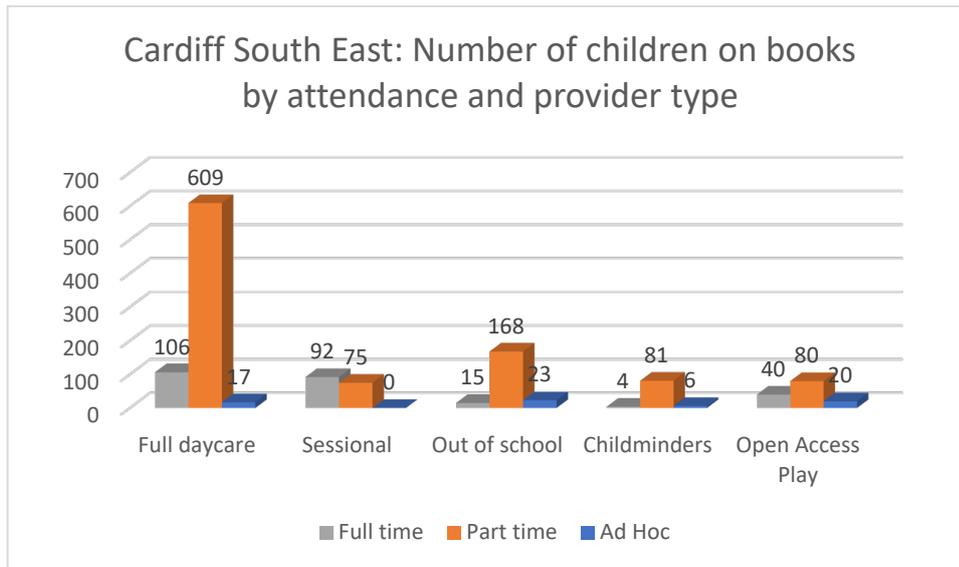


Table: City & Cardiff South: Number of children on books by attendance and provider type

City and Cardiff South	Full time	Part time	Ad Hoc
Full daycare	81	572	19
Sessional	0	60	0
Out of school	2	46	0
Childminders	9	31	0
Total	92	709	19

Chart: City & Cardiff South: Number of children on books by attendance and provider type

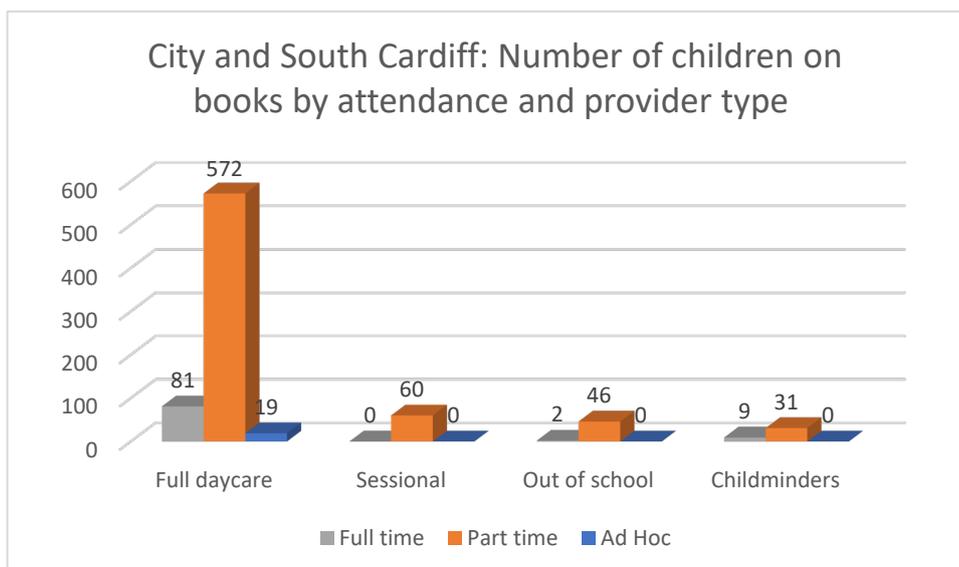


Table: Cardiff South West: Number of children on books by attendance and provider type

South West	Full time	Part time	Ad Hoc
Full daycare	104	917	44
Sessional	25	267	0
Out of school	16	304	60
Childminders	18	176	3
Creche	0	12	0
Total	163	1676	107

Chart: Cardiff South West : Number of children on books by attendance and provider type

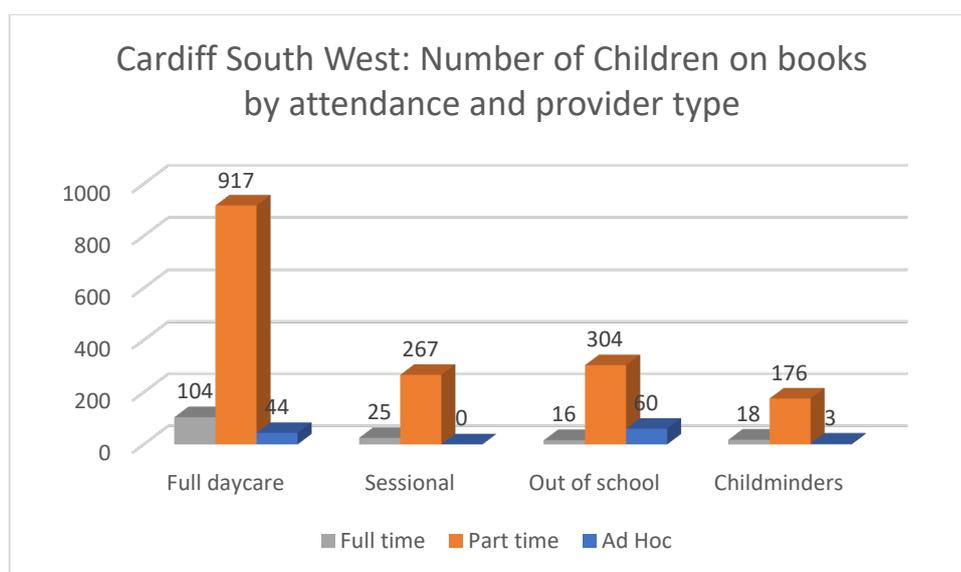
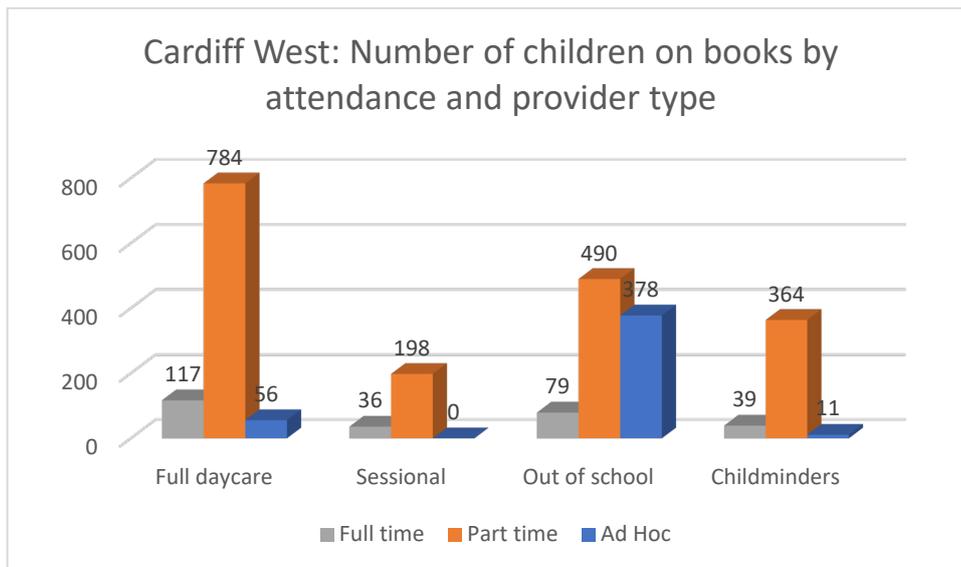


Table: Cardiff West: Number of children on books by attendance and provider type

West	Full time	Part time	Ad Hoc
Full daycare	117	784	56
Sessional	36	198	0
Out of school	79	490	378
Childminders	39	364	11
Open Access Play			
Creche			
	271	1836	445

Chart: Cardiff West: Number of children on books by attendance and provider type



Children on the books by age and provider type

The following tables and charts show the numbers of children on providers' books by age for all provider types

Table: Children on the books by age, all provider types

Cardiff; all provider types	
Under 1	268
1 year	1184
2 years	2126
3 years	2000
4 years	1640
5 - 7 years	1971
8 - 11 years	1694
12 to 14	44
15 to 17	24
Total	10,951

NB: This figure does not match the total number of children on the books by attendance type (10,828). There are 128 more children reported by age than by attendance type.

Chart: Children on the books by age, all provider types

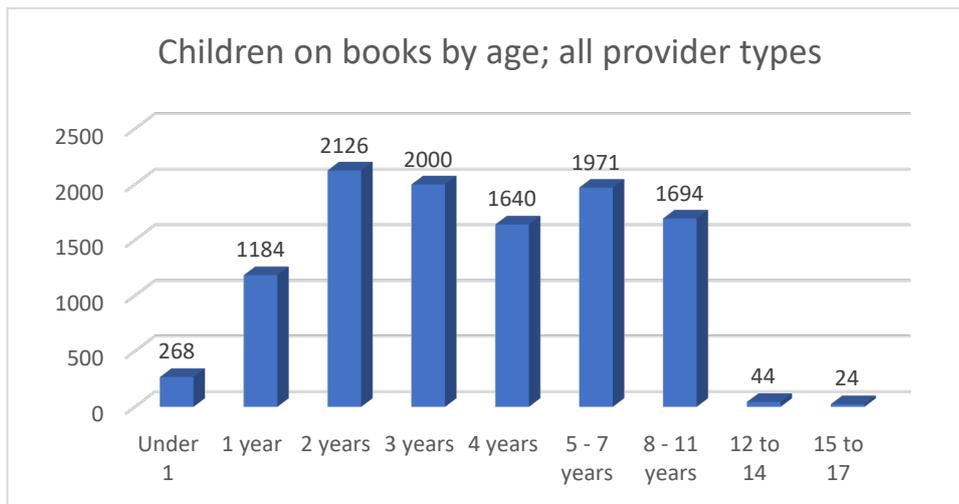
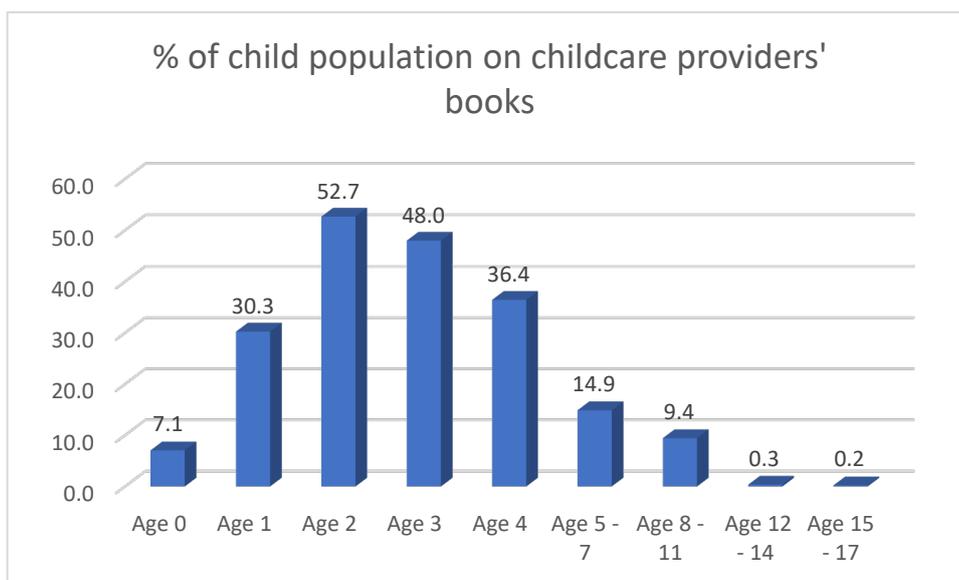


Table: % of child population by age on childcare providers' books

	Population	On books	%
Age 0	3,797	268	7.1
Age 1	3,914	1184	30.3
Age 2	4,037	2126	52.7
Age 3	4,168	2000	48.0
Age 4	4,501	1640	36.4
Age 5 - 7	13,239	1971	14.9
Age 8 - 11	17,936	1694	9.4
Age 12 - 14	12,672	44	0.3
Age 15 - 17	11,108	24	0.2

Chart: % of child population by age on childcare providers' books



- There are only 268 children under 1 on childcare providers' books across all provider types.

- There are 68 children aged over 12, with 24 aged over 15. A number of these older children were reported as being on the books of provider types more usually associated with providing for younger children (30 reported by childminders; 25 by full daycare; and 30 by sessional care). It may be the case that some of these children have additional needs and that these needs can be met by these providers, but it is not possible to confirm this from the data available.
- 52.7% of all 2-year-olds and 48% of all 3-year-olds are on the books of a childcare provider. The high rates are likely to be due to the Government funded childcare programmes (Flying Start, the Childcare Offer)
- NB: children may be on the books of more than one provider, so may be double counted

A breakdown of children on providers' books by age and provider type are included in the relevant provider type section.

Vacancies by NPA - by services, all provider types

The following data tables show the overall net vacancies (or waiting lists, shown as negative figures) across all provider types per NPA. This data shows that there appear to be small pockets of potential unmet demand for some services in some NPAs. This is highlighted in the summary at the end of this section, however:

- Further investigation is required to ascertain if the data is robust
- In most cases, even if the data is valid, there may not be sufficient unmet demand to sustain new stand-alone provision and the expansion of services already existing locally may be a more sustainable and effective approach to addressing demand
- This approach may be limited by the premises from which current providers operate

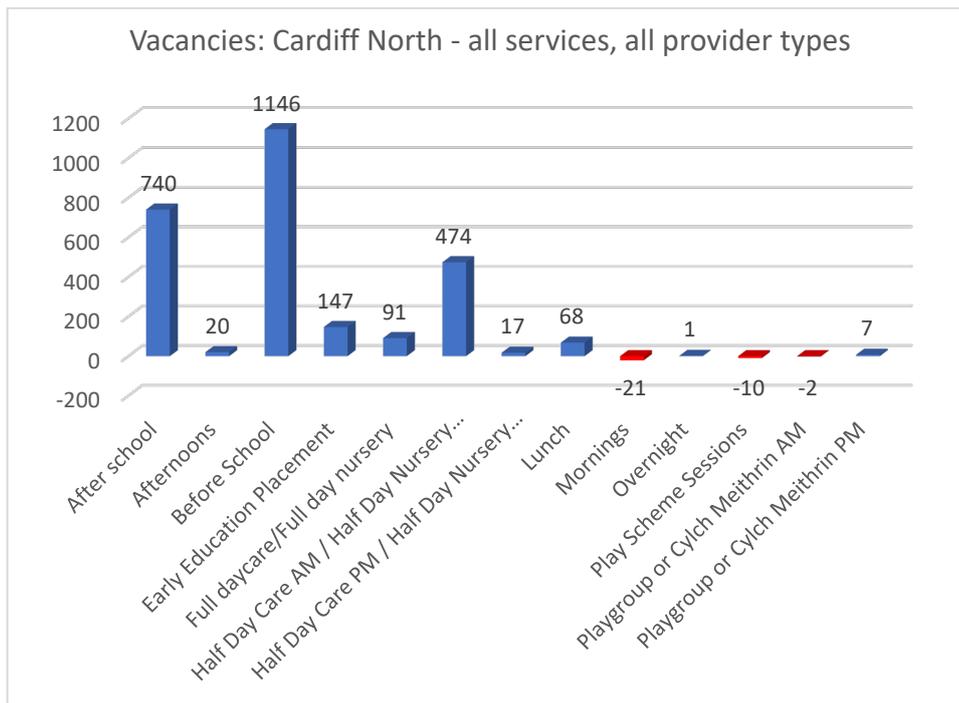
Table: Vacancies: Cardiff - all services, all provider types

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West
After school	740	25	156	63	103	172
Afternoons	20	0	4	17	28	238
Before School	1146	34	20	88	255	222
Creche			18			
Early Education Placement	147	42	28	20	20	20
Evenings		13	15	45	2	7
Full daycare/Full day nursery	91	20	480	660	13	-29
Half Day Care AM / Half Day Nursery AM	474	23	866	527	-23	17
Half Day Care PM / Half Day Nursery PM	17	8	12	-3	12	0
Lunch	68	8	18	0	55	0
Mornings	-21	10	27	16	36	151
Overnight	1					
Play Scheme Sessions	-10					6
Playgroup or Cylch Meithrin AM	-2	2	0	-6	0	-5
Playgroup or Cylch Meithrin PM	7	6	0	1	0	44
Weekends			20		2	

Key to table above:

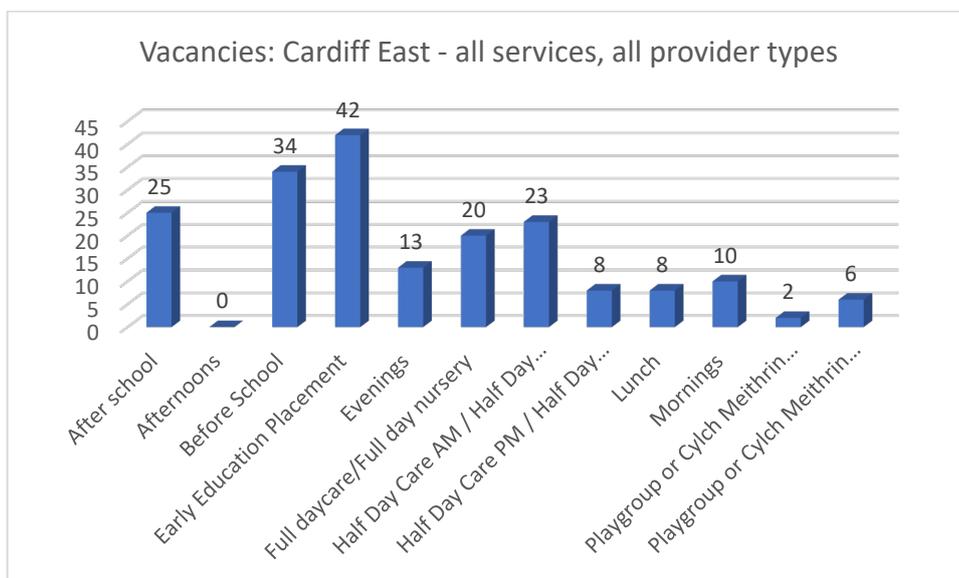
Number of net vacancies for service in NPA
Neither vacancy or waiting list (service provided)
Number of children on waiting list for an immediate place (waiting list exceeds vacancies)
Service not provided in NPA

Chart: Cardiff North - all services, all provider types



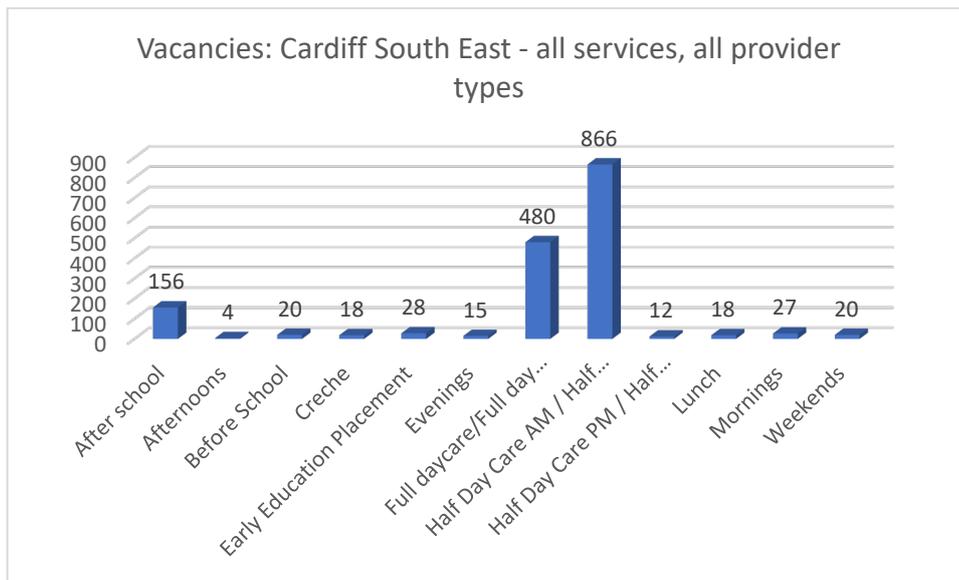
- Cardiff North – 21 children waiting for Morning, 10 children waiting for playscheme session, 2 for Playgroup/Cylch Meithrin AM (NB: vacancies exist for Playgroup/Cylch Meithrin PM)

Chart: Cardiff East - all services, all provider types



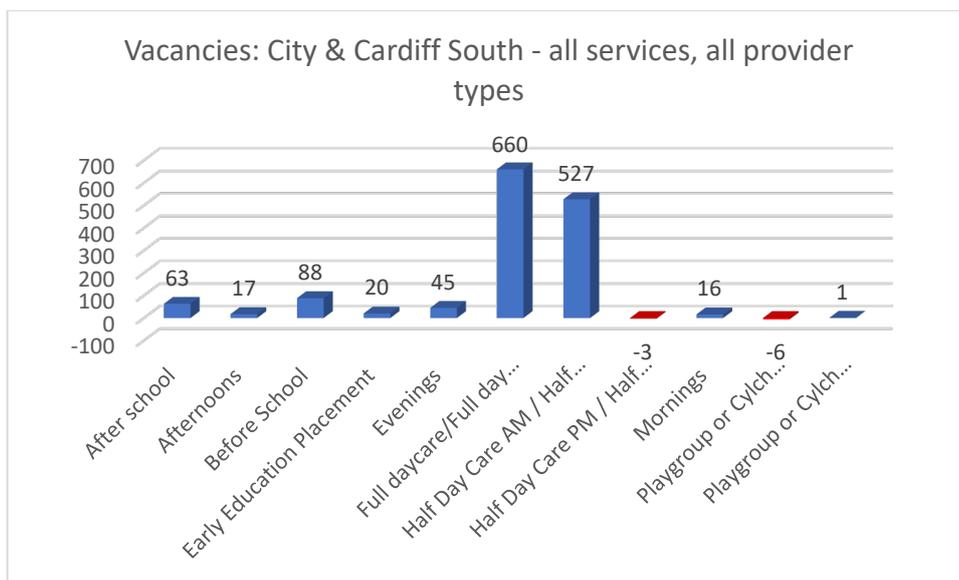
- Cardiff East - No children waiting for any service

Chart: Cardiff South East - all services, all provider types



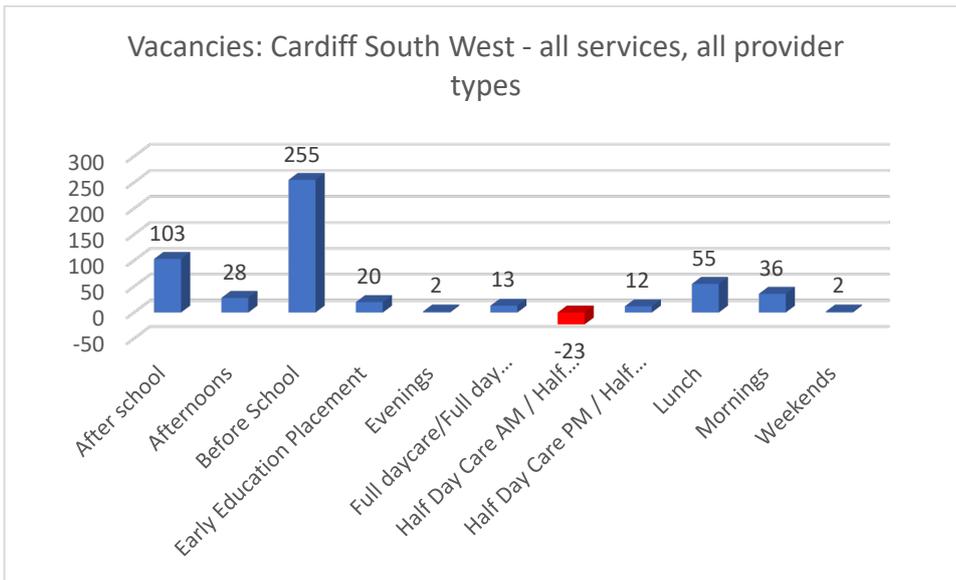
- Cardiff South East - No children waiting for any service

Chart: City & Cardiff South - all services, all provider types



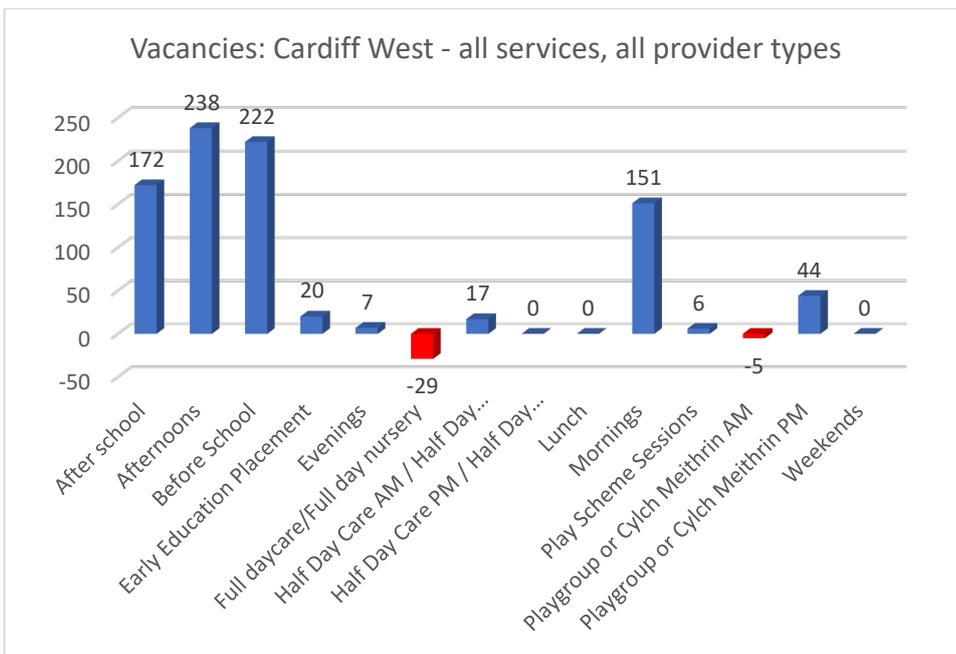
- City and Cardiff South – 3 children waiting for Half Day Care/Half Day Nursery PM (NB: 527 Half Day Care/Half Day Nursery AM vacancies). 6 children waiting for Playgroup/Cylch Meithrin AM place

Chart: Cardiff South West - all services, all provider types



- Cardiff South West - 23 children waiting for a Half Day Care/Half Day Nursery place

Chart: Cardiff West - all services, all provider types



- Cardiff West - Cardiff 29 children waiting for a Full Day Care/Full Day Nursery place (NB: 151 Morning vacancies exist in this NPA). 5 children waiting a Playgroup/Cylch Meithrin AM place (NB: 151 Morning vacancies reported)

Table: Vacancies by service and NPA

NPA	Service	Reported unmet demand (children waiting for an immediate place above current vacancy, by service)	Comments
Cardiff North	Mornings	21	474 vacancies for Half Day Care/Half Day Nursery AM exist in the NPA
	Play scheme sessions	10	Holiday provision – unsure which holiday the waiting list is for
	Playgroup/Cylch Meithrin AM	2	
Cardiff East	No children waiting for any service		
Cardiff South East	No children waiting for any service		
City and Cardiff South	Half Day Care/Half Day Nursery PM	3	
	Playgroup/Cylch Meithrin AM	6	527 Half Day Care/Half Day Nursery AM vacancies
Cardiff South West	Half Day Care/Half Day Nursery AM	23	NB: 36 Morning vacancies
Cardiff West	Full Day Care/Full Day Nursery pl	29	
	Playgroup/Cylch Meithrin AM	5	151 Morning vacancies

- Cardiff North – 21 children waiting for Morning, 10 children waiting for playscheme session, 2 for Playgroup/Cylch Meithrin AM (NB: vacancies exist for Playgroup/Cylch Meithrin PM)
- Cardiff East - No children waiting for any service
- Cardiff South East - No children waiting for any service
- City and Cardiff South – 3 children waiting for Half Day Care/Half Day Nursery PM (NB: 527 Half Day Care/Half Day Nursery AM vacancies). 6 children waiting for Playgroup/Cylch Meithrin AM place
- Cardiff South West - 23 children waiting for a Half Day Care/Half Day Nursery place (NB: 36 Morning vacancies available)
- Cardiff West - Cardiff 29 children waiting for a Full Day Care/Full Day Nursery place (NB: 151 Morning vacancies exist in this NPA). 5 children waiting a Playgroup/Cylch Meithrin AM place (NB: 151 Morning vacancies reported)

Action: For the four NPAs (Cardiff North; City and Cardiff South; Cardiff South West; Cardiff West) where demand appears to outweigh capacity, conduct detailed investigation to ascertain robustness of data. If demand exists, contact local providers of identified services to explore ability to expand provision from existing sites.

It should be noted that from these figures supplied for the SASS, across all providers and for all services, the total demand above capacity to supply shows only 99 children were reported as waiting for an immediate place.

7. Supply of Childcare

7.1. Childminder

The following data tables and charts are based on data collected via SASS

Table: Childminder headline data

Number of Registered Settings	185	Term time only	32
		Term time and holiday	153
		Holiday only	0
Number of Registered Places	1,557		
Number of children on books by age	1,461		
Number of children by attendance	1,461	Full time	187
		Part time	1,225
		Ad hoc	49
Main Language of setting			
English/Both	175/4		
Welsh	4	Provide active offer	13
		Working towards active offer	20
Number Providing Childcare Offer (Number Funded via Childcare Offer)	120 (65)		
Number Offering Tax Free Childcare or Vouchers	149		

Table: Childminders: settings by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Total	77	12	13	7	27	49	185

Chart: Childminders: settings by NPA

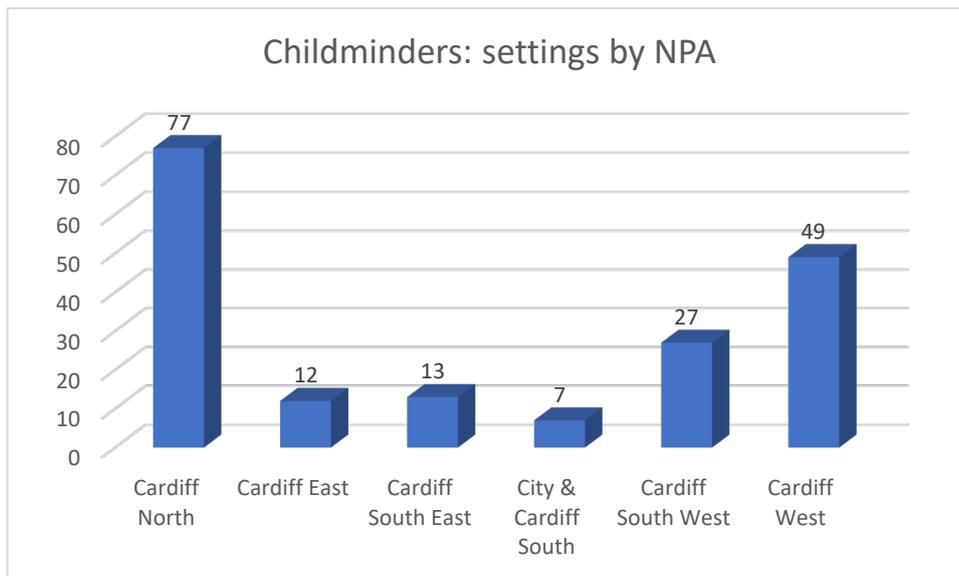
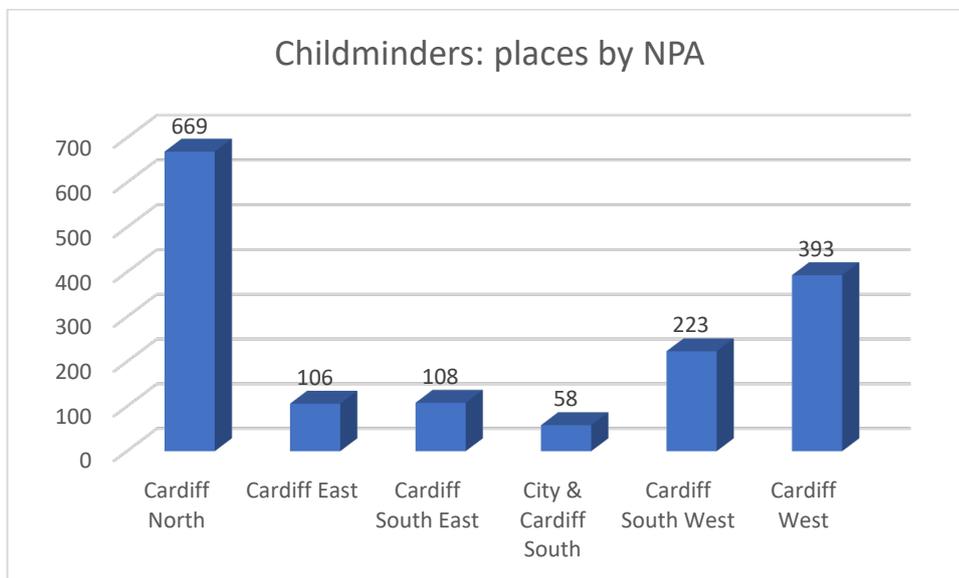


Table: Childminders: places by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Total	669	106	108	58	223	393	1557

Chart: Childminders; places by NPA



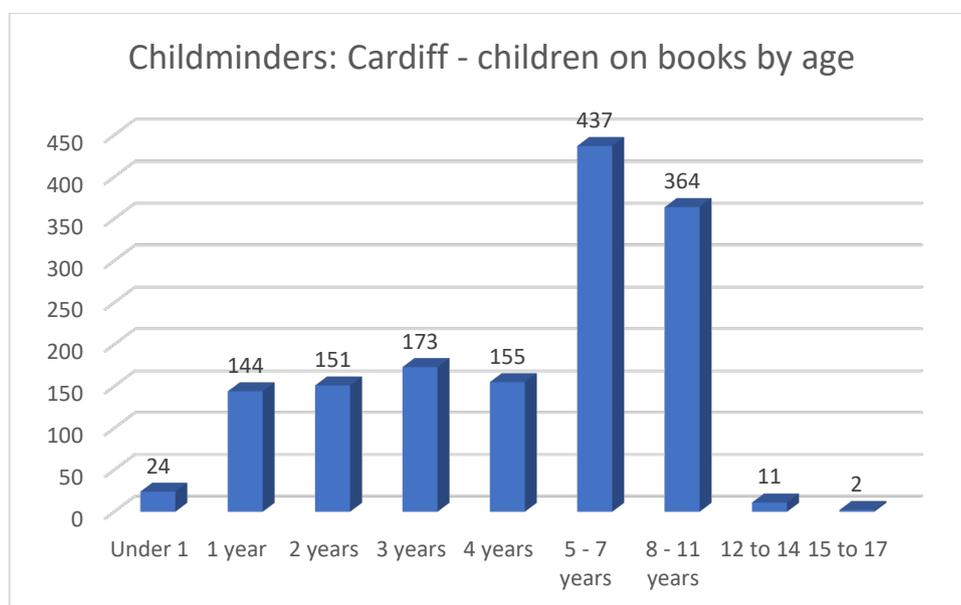
- The largest number of childminders operate in Cardiff North (77 settings, 669 places). The smallest number are in City & Cardiff South (7 settings, 58 places)

Childminders: Children on the books by age

Table: Childminders: Children on the books by age

Childminders	Number of children
Under 1	24
1 year	144
2 years	151
3 years	173
4 years	155
5 - 7 years	437
8 - 11 years	364
12 to 14	11
15 to 17	2

Chart: Childminders: Children on the books by age

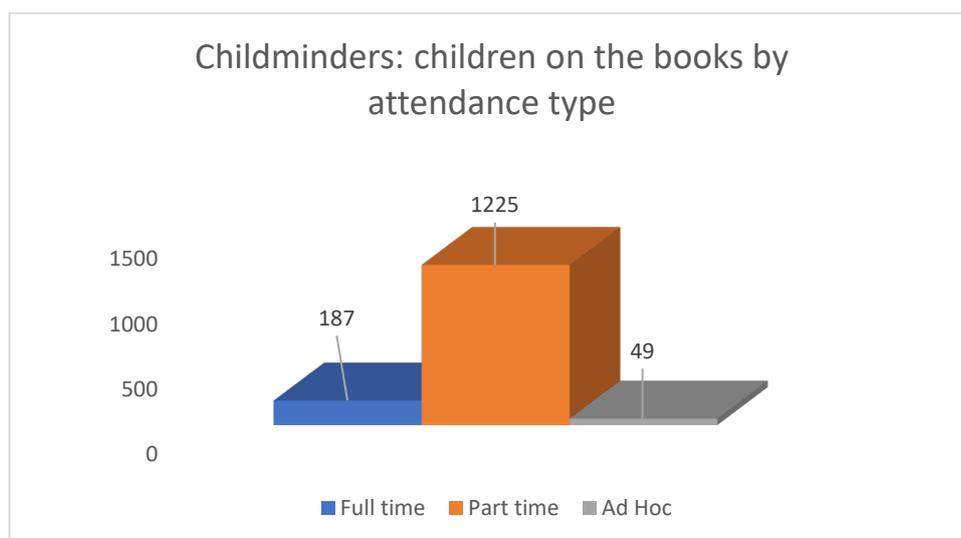


Childminders: children on the books by attendance type

Table: Out of school: children on the books by attendance type

Full time	187
Part time	1225
Ad Hoc	49

Chart: Childminders: children on the books by attendance type



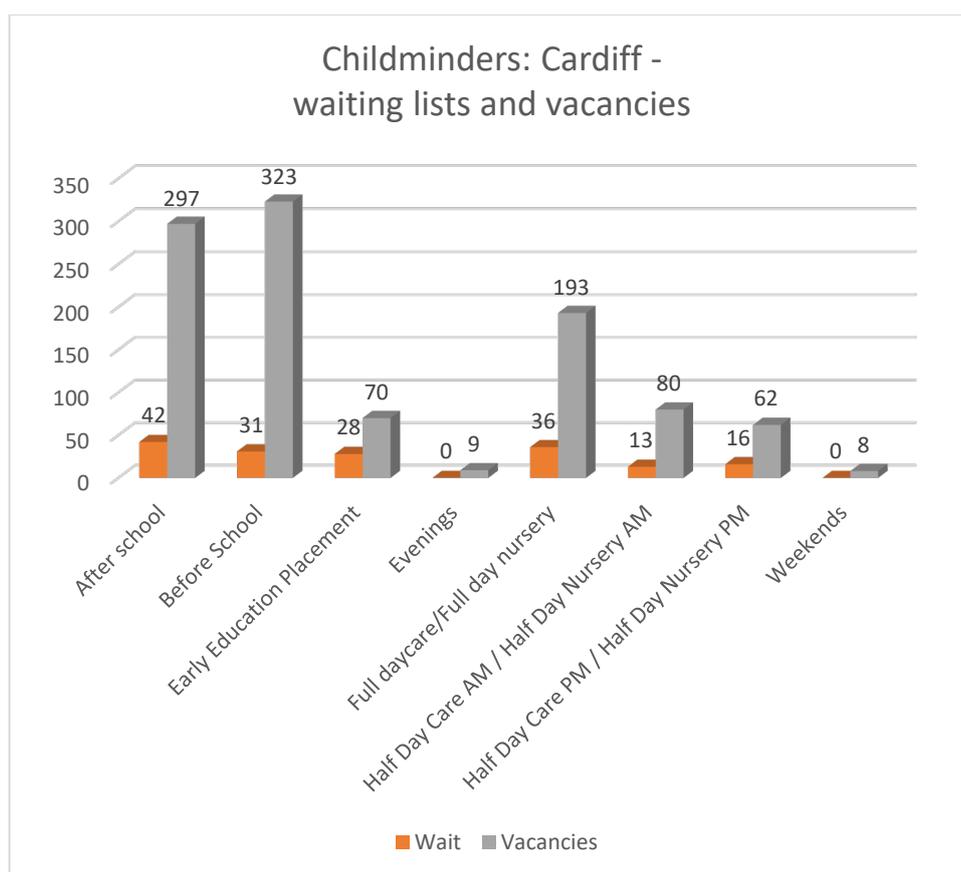
- The majority of children (801 of the 1461 reported by age) who attend a childminder are of primary school age (5 – 11 years)
- The majority of children (1225 of the 1461 reported by attendance type) attend on a part-time basis

Childminders: Cardiff - Waiting lists and vacancies

Table: Childminders: Cardiff - Waiting lists and vacancies

Service	Children waiting for an immediate place	Vacancies
After school	42	297
Before School	31	323
Early Education Placement	28	70
Evenings	0	9
Full daycare/Full day nursery	36	193
Half Day Care AM / Half Day Nursery AM	13	80
Half Day Care PM / Half Day Nursery PM	16	62
Weekends	0	8
	109	1043

Chart: Childminders: Cardiff - waiting lists and vacancies

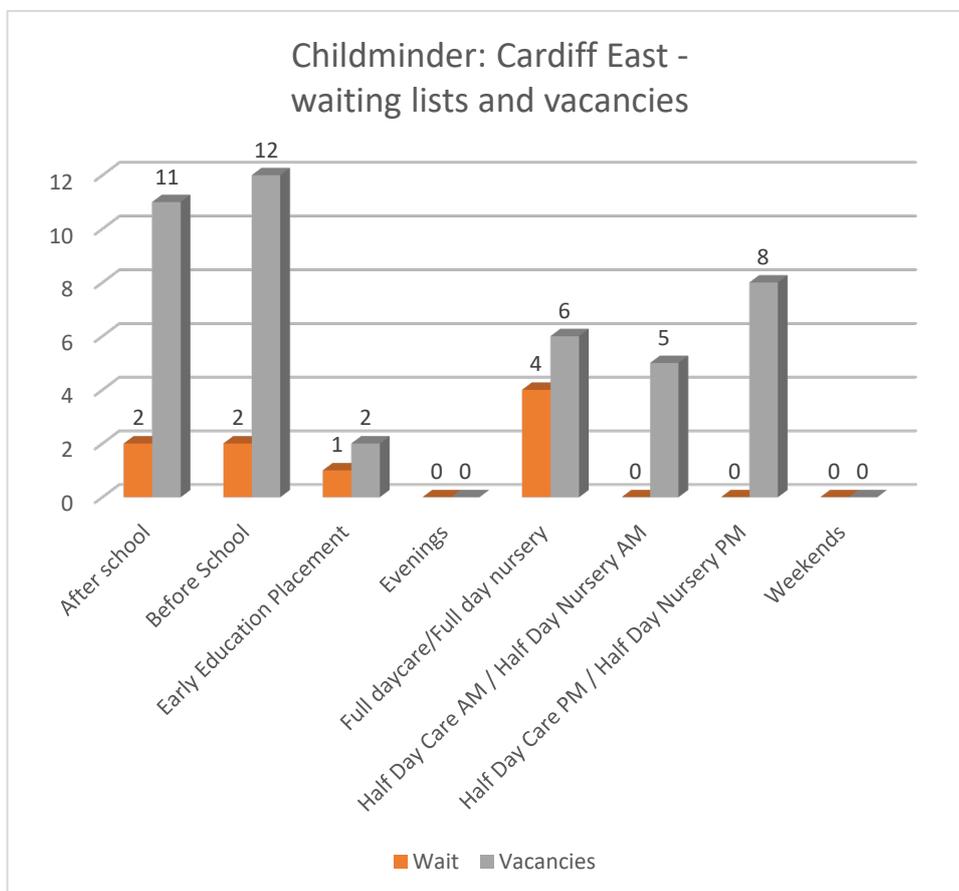
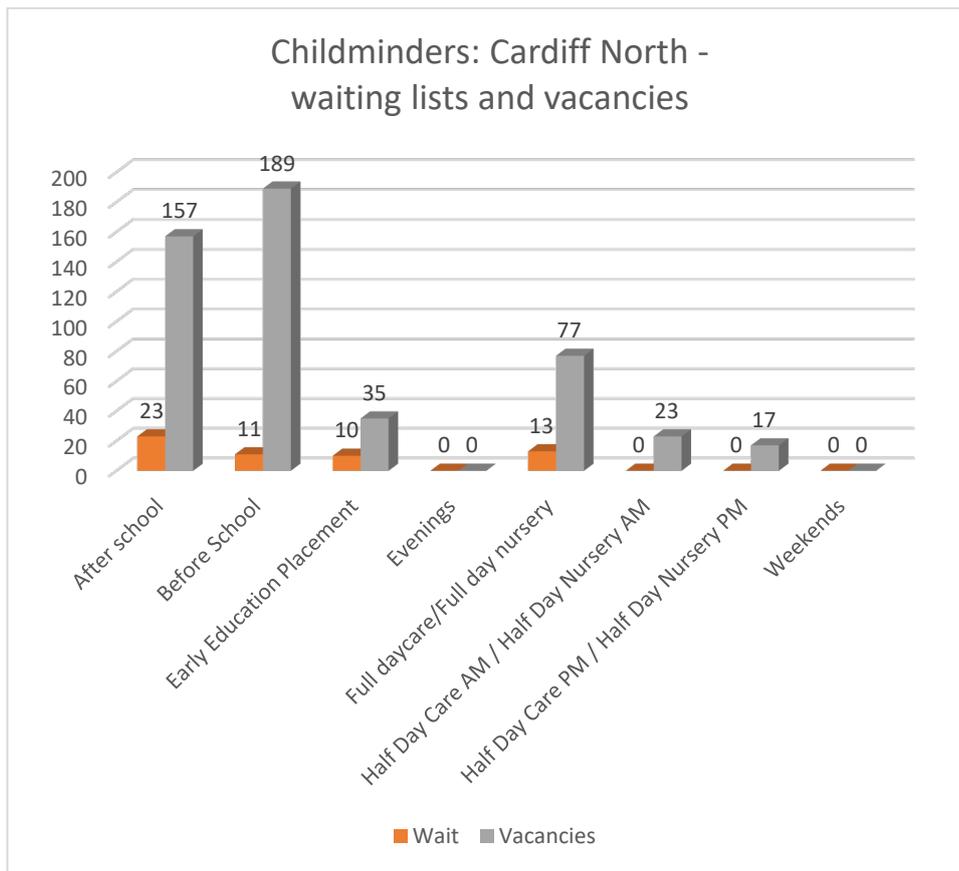


- Overall there are more vacancies across Cardiff Childminding settings (1,043) than there are children on waiting lists (109)
- This is the case for all services provided in all NPAs, except for 3 children waiting for half day pm places in City & Cardiff South

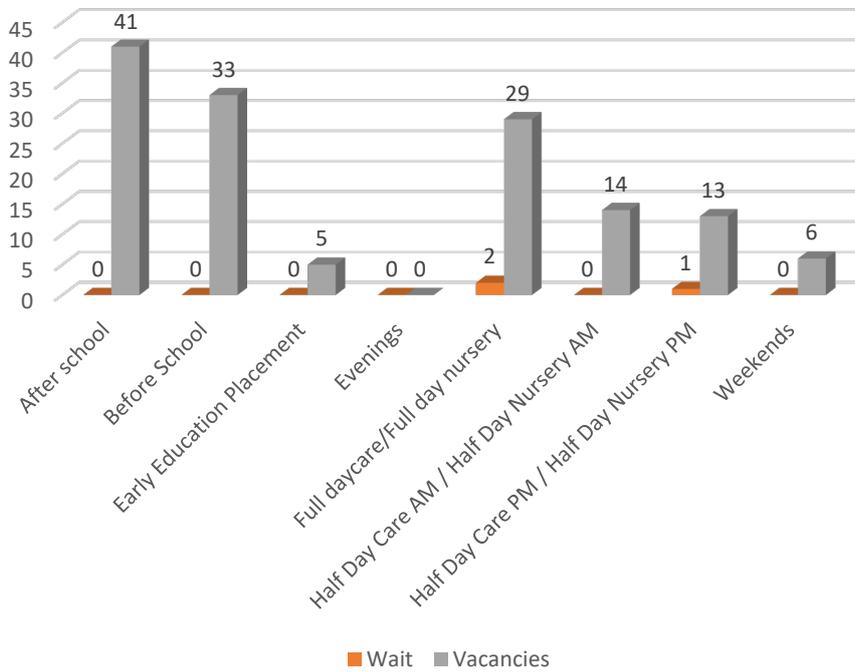
Table: Childminders: By NPA – waiting list and vacancies

Childminder	Cardiff North		Cardiff East		Cardiff South East		City & Cardiff South		Cardiff South West		Cardiff West	
	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies
After school	23	157	2	11	0	41	0	4	6	39	11	45
Before School	11	189	2	12	0	33	0	12	6	10	12	67
Early Education Placement	10	35	1	2	0	5	0	4	6	10	11	14
Evenings	0	0	0	0	0	0	0	0	0	2	0	7
Full daycare/ Full day nursery	13	77	4	6	2	29	0	4	3	31	14	46
Half Day Care AM / Half Day Nursery AM	0	23	0	5	0	14	0	0	4	15	9	23
Half Day Care PM / Half Day Nursery PM	0	17	0	8	1	13	3	0	4	16	8	8
Weekends	0	0	0	0	0	6	0	0	0	2	0	0

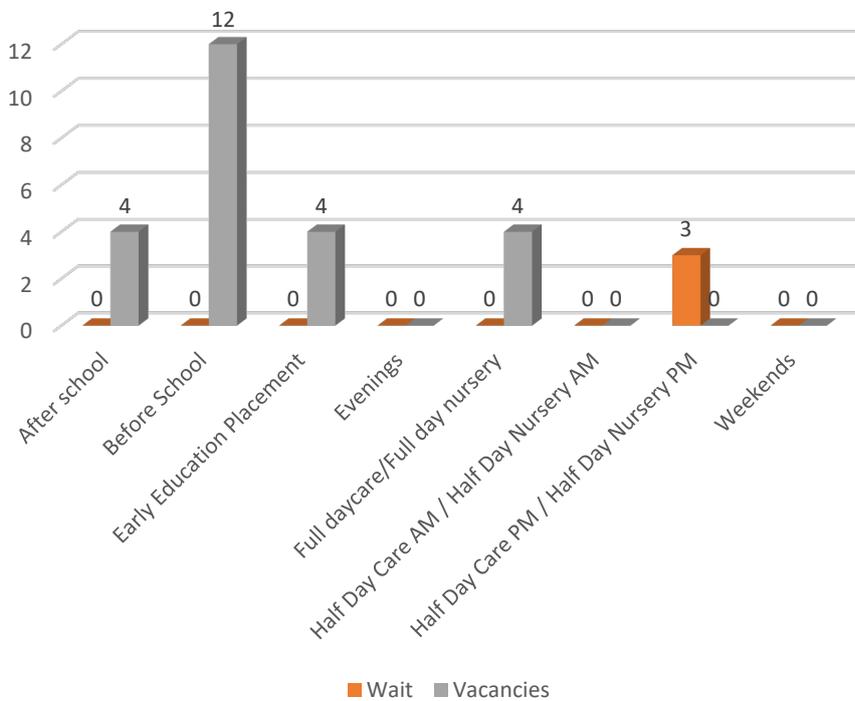
Charts: Childminders – waiting lists and vacancies by NPA



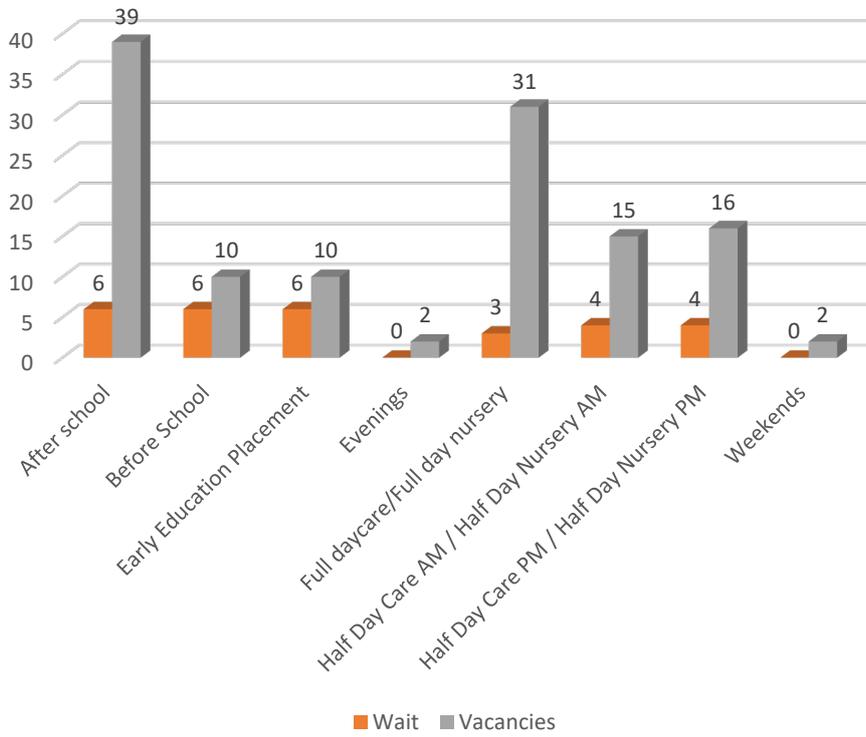
Childminders: Cardiff South East - waiting lists and vacancies



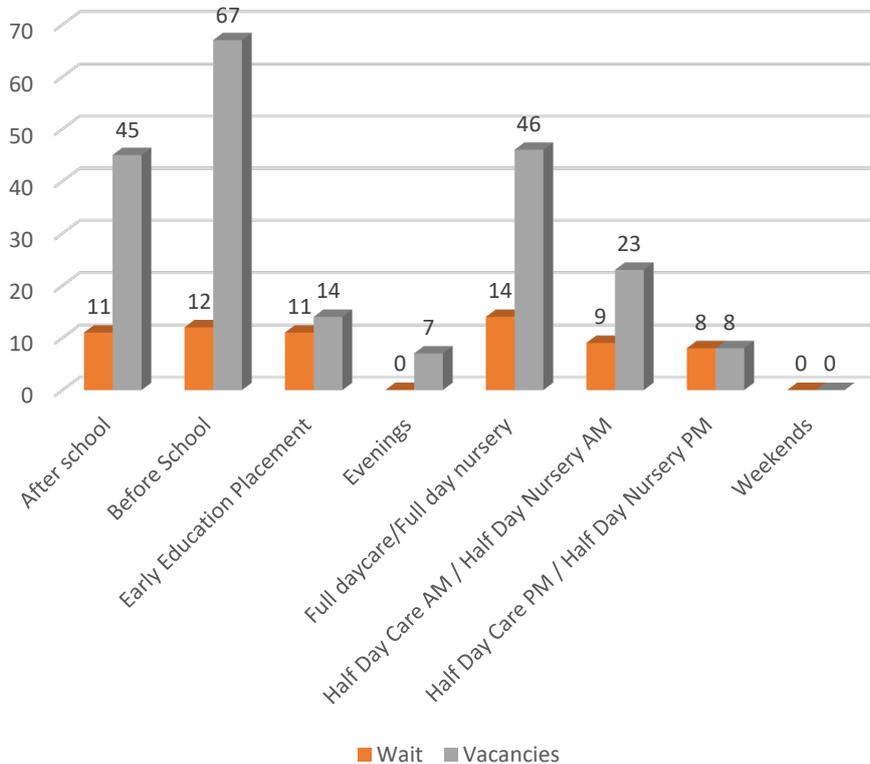
Childminders: City & Cardiff South - waiting lists and vacancies



Childminders : Cardiff South West - waiting lists and vacancies



Childminders: Cardiff West - waiting lists and vacancies

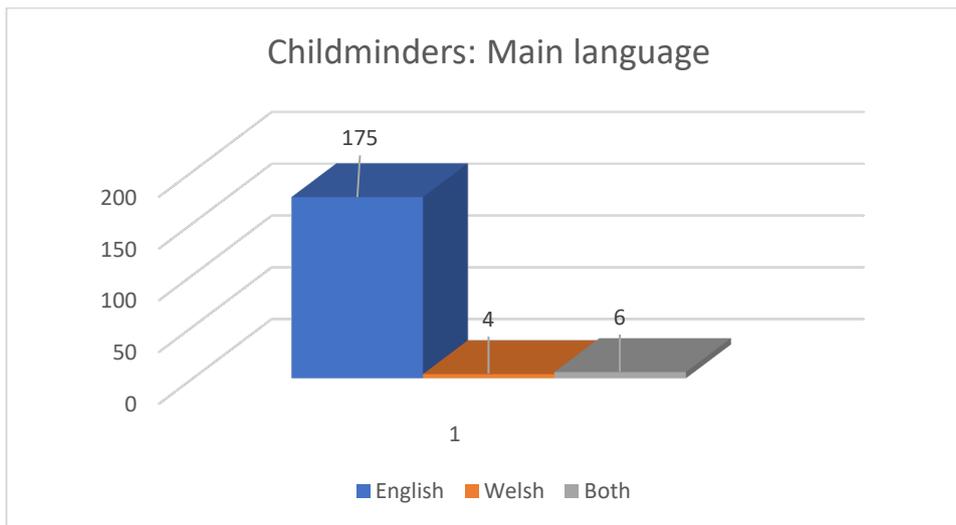


Childminders: languages

Table: Childminders: languages

English/Both	175
Both	6
Welsh	4

Chart: Childminders: languages

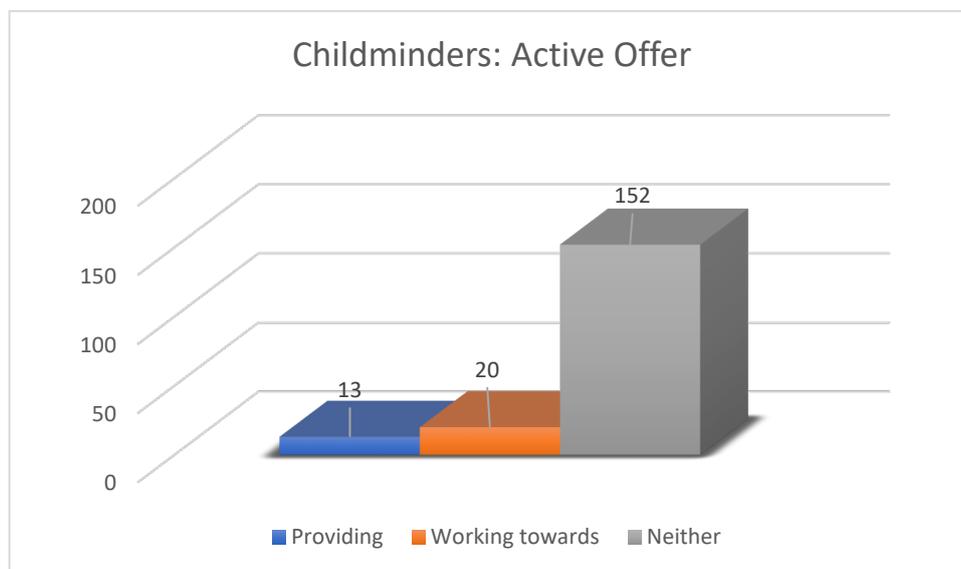


Childminders: Active Offer

Table: Childminders: Active Offer

Providing	13
Working towards	20
Neither	152

Chart: Childminders: Active Offer



Childminders – other languages

Table: Childminders – other languages

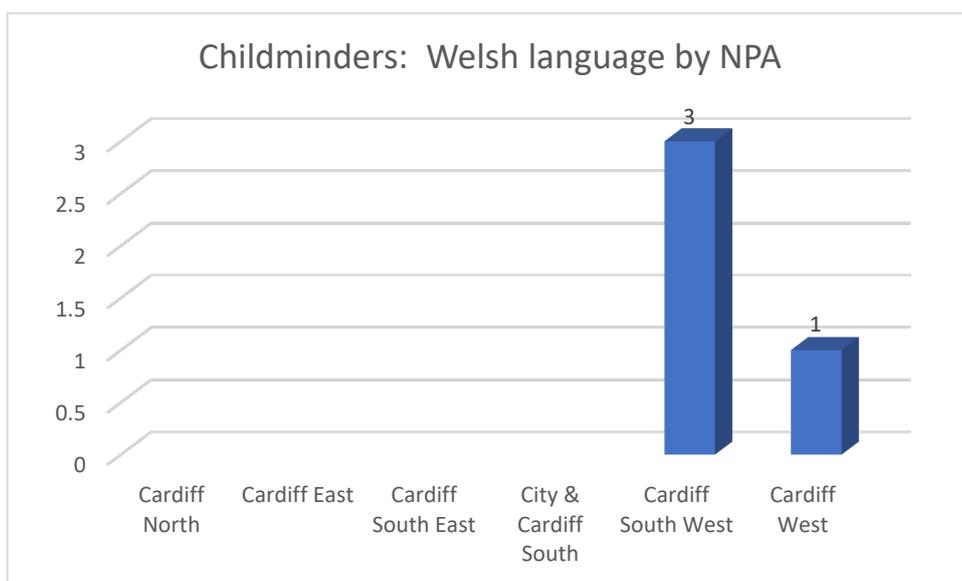
Any as required	1
French/Welsh	2
Polish	2
Portuguese / Spanish / Welsh	1
Punjabi / Urdu	1
Spanish	1

Childminders: Welsh language – distribution by NPA

Table: Welsh medium childminders by NPA

	Cardiff North	Cardiff East	Cardiff South East	City Cardiff & South	Cardiff South West	Cardiff West	Cardiff
Total	-	-	-	-	3	1	4

Chart: Childminders: Welsh language by NPA



- Four childminders provide through the medium of Welsh (3 in Cardiff South West, 1 in Cardiff West)
- 13 provide the Active Offer, with a further 20 working towards the Active Offer

Action: In order to encourage more childminders to use the Welsh language, Cardiff Workforce Development and Accredited Centre will continue to promote the Welsh Government funded Camau entry level course, tailored for the Early Years and Childcare Workforce

Action: The Childcare Business Support Team will actively target individual with Welsh language skills when marketing the childminding qualifying training.

Childminders – Fees by age

Table: Childminders – fees; under 1

Under 1	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	£7.00	-	£60.00	£80.00	-
Lowest	£5.00	-	£45.00	£45.00	-
Mode	£5.00	-	£45.00	£45.00	-

Chart: Childminders – fees; under 1

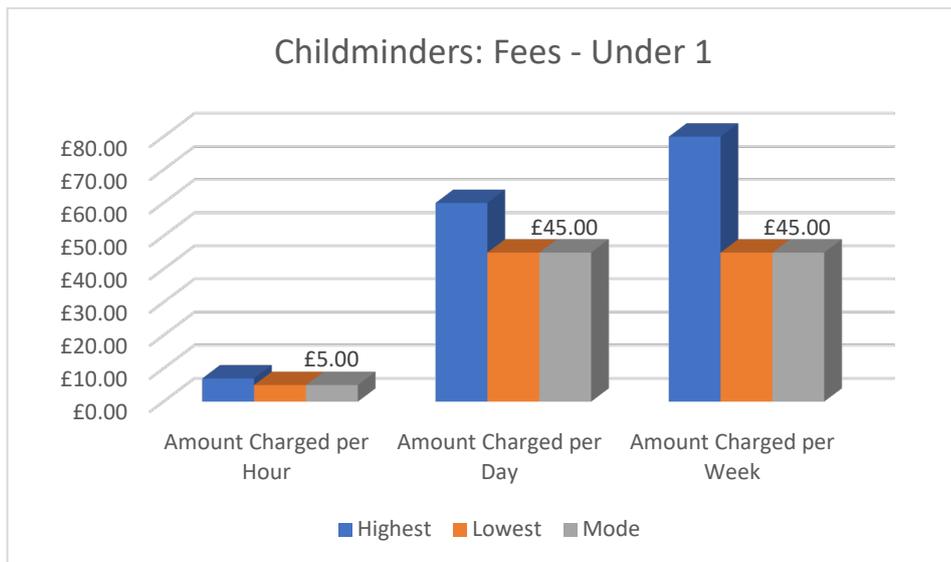


Table: Childminders – fees; 1 year olds

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
1 year olds					
Highest	£47.50	£50.00	£55.00	£225.00	£200.00
Lowest	£4.50	£1.00	£1.00	£50.00	£200.00
Mode	£5.00	£45.00	£45.00	N/A	£200.00

Chart: Childminders – fees – 1 year olds

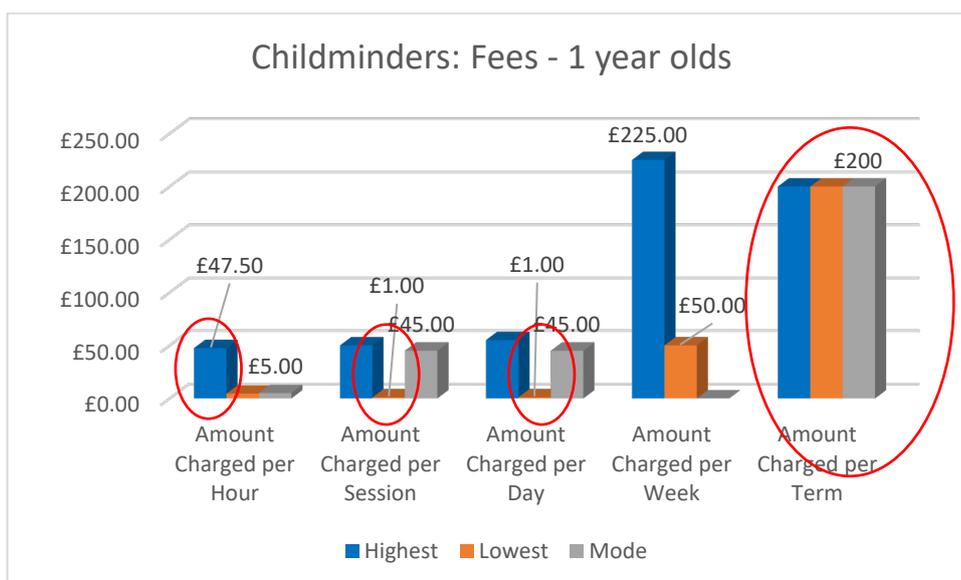


Table: Childminders – fees; 2 year olds

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	£7.00	£50.00	£90.00	£200.00	
Lowest	£4.50	£1.00	£1.00	£80.00	
Mode	£5.00	£48.00	£45.00	N/A	

Chart: Childminders – fees; 2 year olds

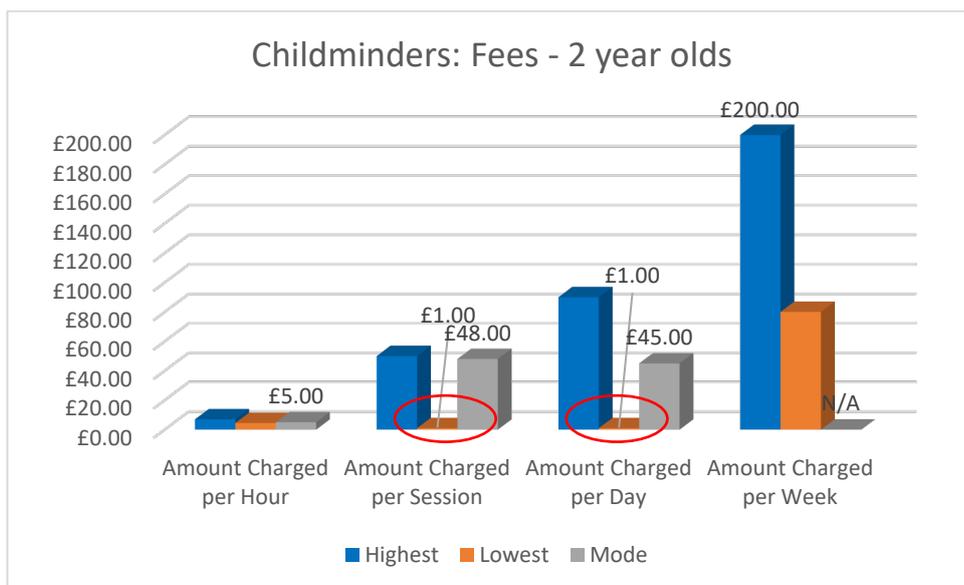


Table: Childminders – fees; 3 year olds

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	£25.00	£50.00	£50.00	£320.00	£90.00
Lowest	£4.50	£1.00	£1.00	£80.00	£90.00
Mode	£5.00	£30.00	£45.00	N/A	£90.00

Chart: Childminders – fees; 3 year olds

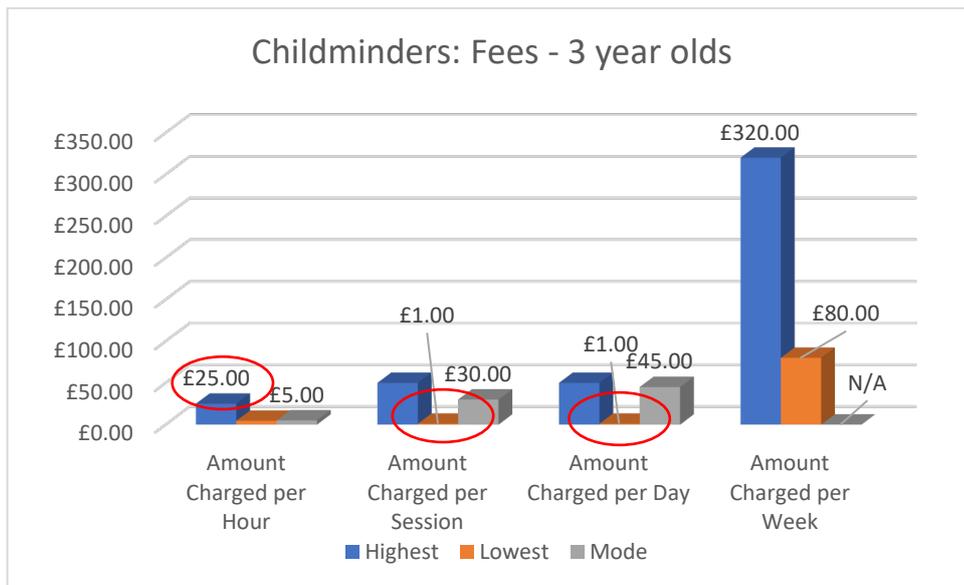


Table: Childminders – fees; 4 year olds

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
4 year olds					
Highest	£30.00	£50.00	£60.00	£150.00	-
Lowest	£4.50	£7.50	£20.00	£90.00	-
Mode	£5.00	£20.00	£45.00	N/A	-

Chart: Childminders – fees; 4 year olds

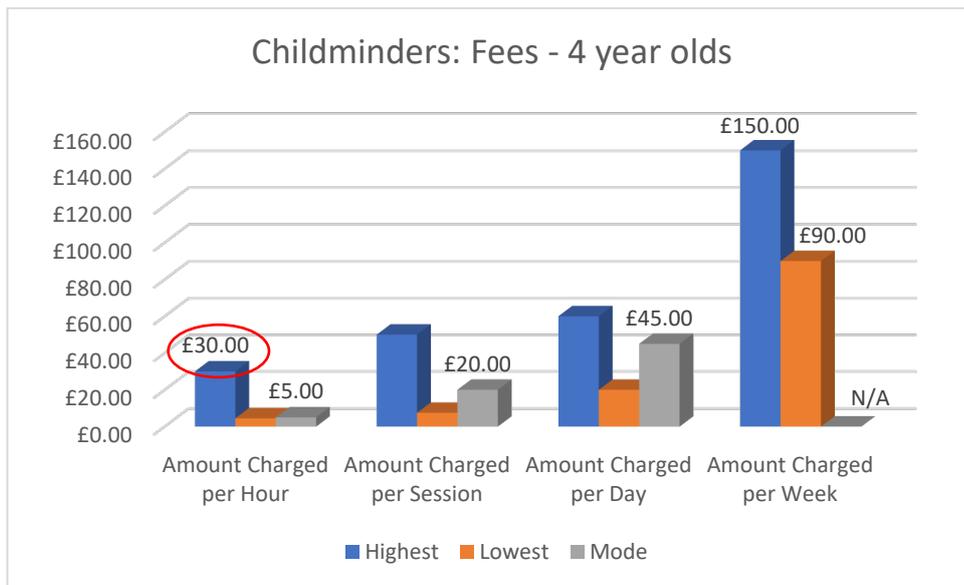


Table: Childminders – fees; 5-7 year olds

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
5-7 year olds					
Highest	£7.50	£25.00	£60.00	£160.00	£150.00
Lowest	£4.50	£1.00	£1.00	£25.00	£150.00
Mode	£5.00	£10.00	£45.00	£25.00	£150.00

Chart: Childminders – fees; 5-7 year olds

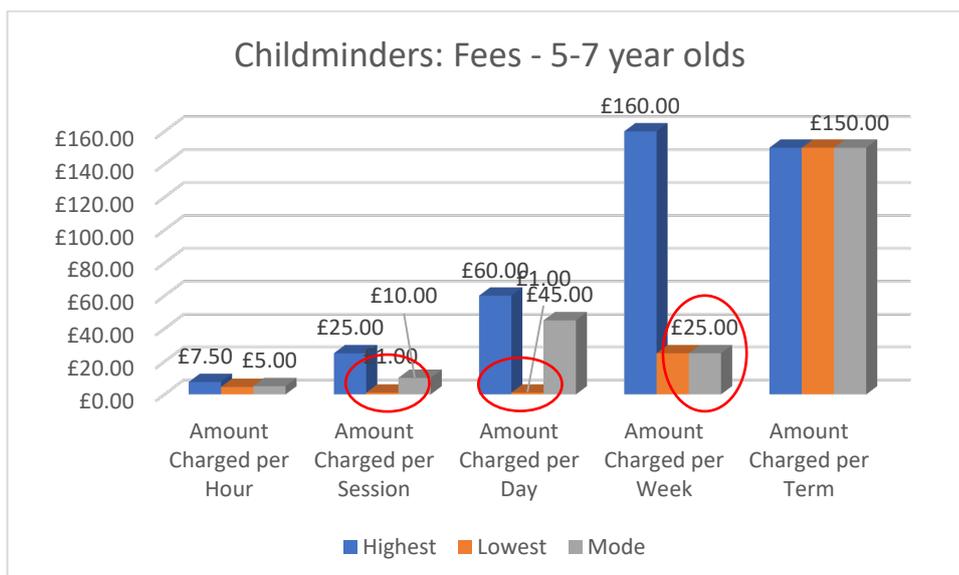


Table: Childminders – fees; 8-11 year olds

8 -11 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	£10.00	£20.00	£60.00	£147.50	£87.50
Lowest	£4.00	£1.00	£1.00	£41.00	£5.00
Mode	£5.00	£10.00	£20.00	£45.00	N/A

Chart: Childminders – fees; 8-11 year olds

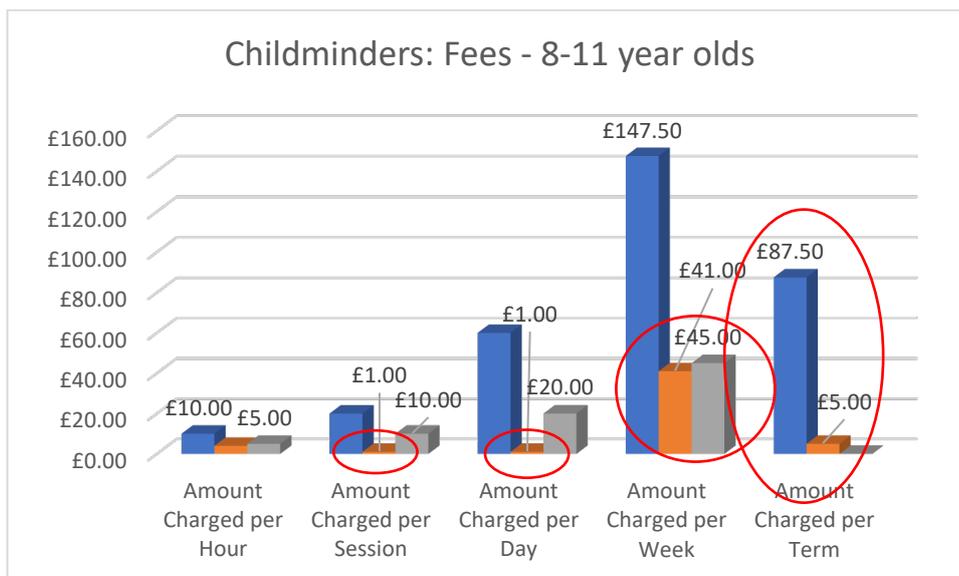


Table: Childminders – fees; 12-14 year olds

12 - 14 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day
Highest	£6.00	£10.00	£45.00
Lowest	£5.50	£1.00	£1.00
Mode	£6.00	£1.00	£1.00

Chart: Childminders – fees; 12-4 year olds

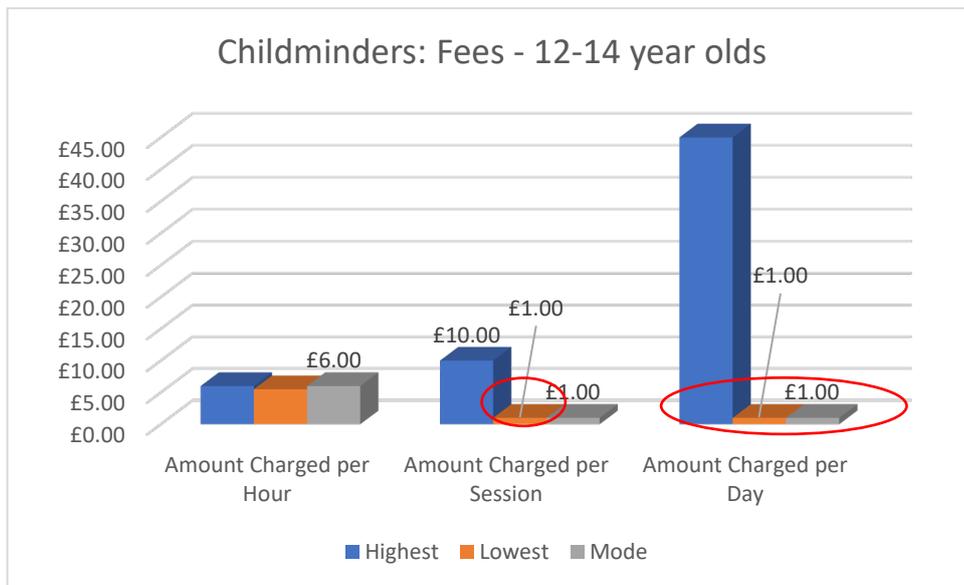
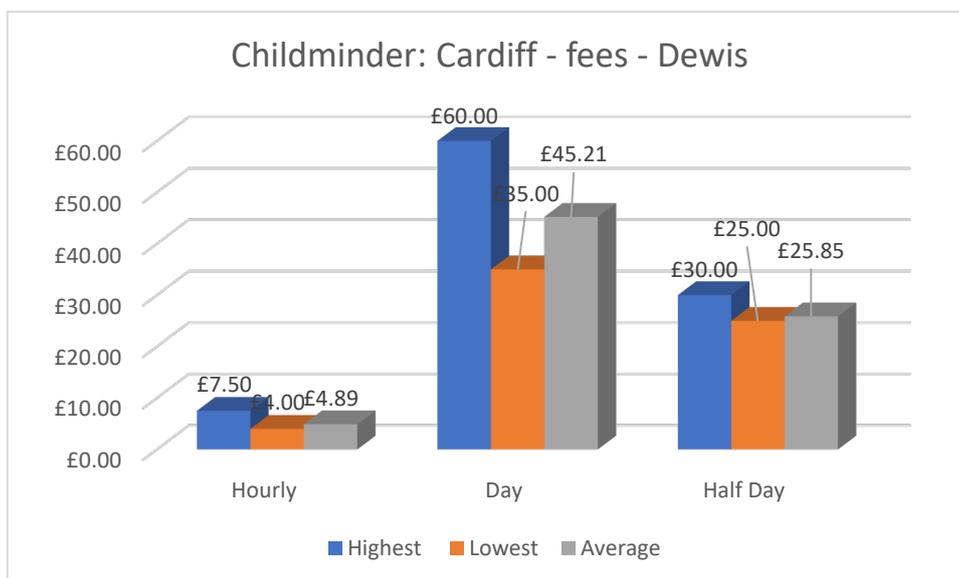


Table: Childminders: Cardiff - fees as per Dewis records

Childminder	Highest	Lowest	Average
Hourly	£7.50	£4.00	£4.89
Day	£60.00	£35.00	£45.21
Half Day	£30.00	£25.00	£25.85

Chart: Childminder: Cardiff – fees as per Dewis



- The modal hourly rate for children aged 0 – 11 across all NPAs is £5.00, which rises to £6.00 for 12-14 year olds. The most common daily rate for all ages is £45.00
- Dewis data indicates an average hourly rate of £4.89 and an average day rate of £45.21

- Due to data outliers and apparent discrepancies, it is not possible to produce robust sessional, weekly or termly costings.

Childminders: Opening hours and atypical hours

Table: Childminders: Cardiff – range of opening hours

Cardiff	Earliest opening time	Latest opening time	Earliest closing time	Latest closing time	Number of settings open before 8 am	Number of settings open after 6 pm
Monday	6.00	16.00	12.00	20.00	100	8
Tuesday	6.00	16.00	9.00	20.00	107	4
Wednesday	5.50	16.00	9.00	20.00	107	9
Thursday	5.50	16.00	15.30	20.00	108	9
Friday	5.50	16.00	8.45	20.00	94	11
Saturday	7.30	16.00	14.00	20.00	1	1
Sunday	9.00	9.00	14.00	14.00	0	0

Chart: Childminders: Cardiff – range of opening hours

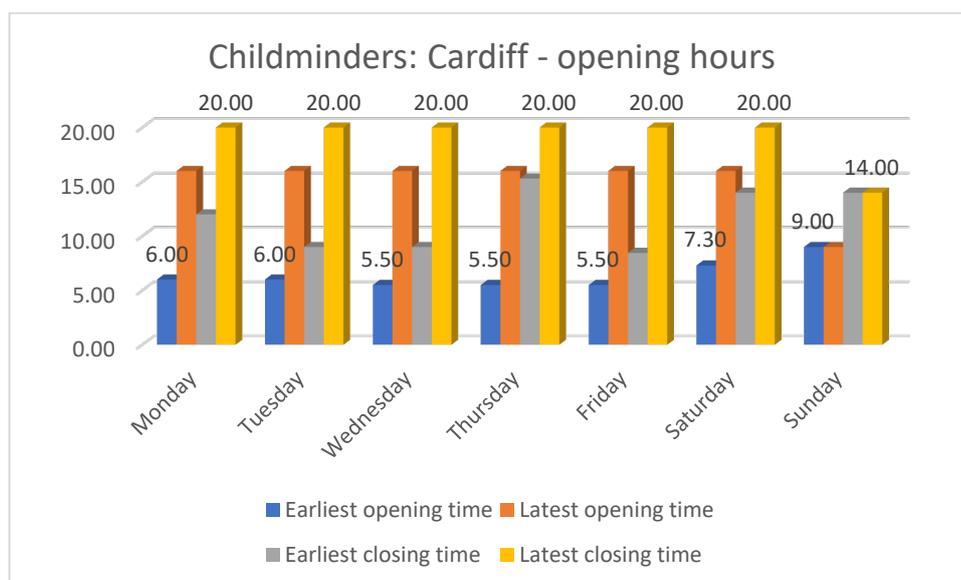
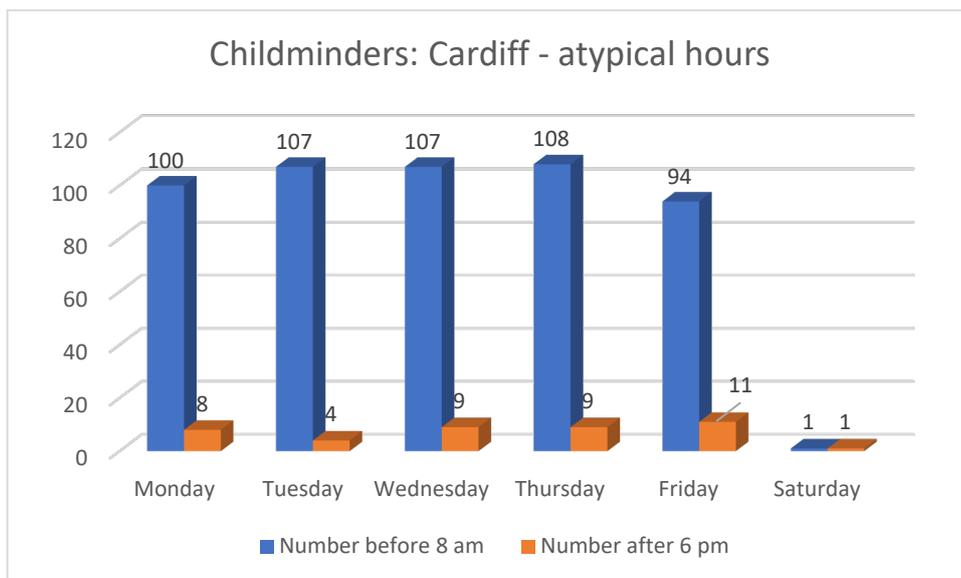
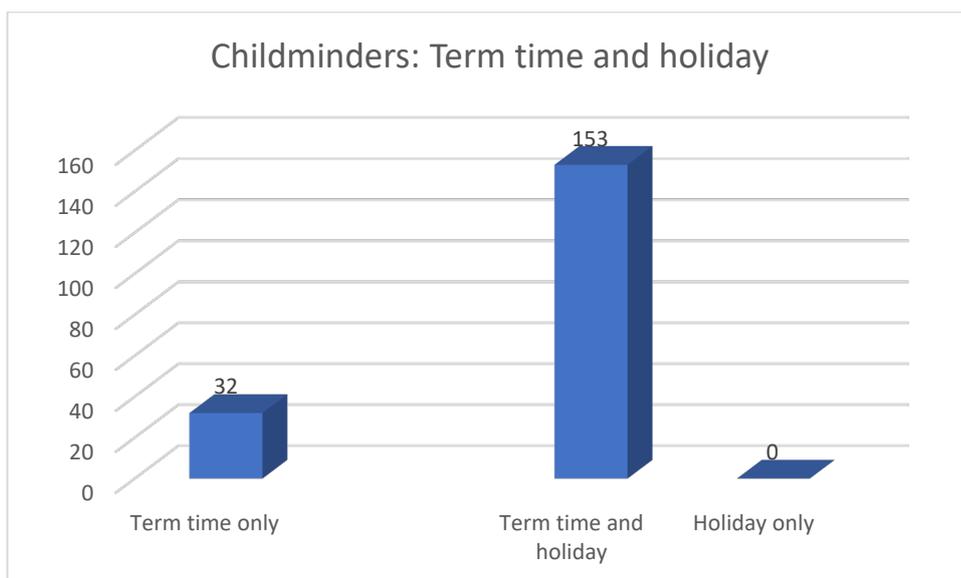


Chart: Childminders; Cardiff – setting open atypical hours



- Between 94 and 108 childminders operate weekdays before 8am, and between 8 and 11 childminders operate weekdays after 6pm. The earliest start is 5.50 am, and the latest finish is 8.00 pm.
- 6 childminders operate at weekends, including one before 8pm and after 6pm on a Saturday.

Chart: Childminders: Term time and holidays



- The majority of childminders operate year-round (153)

Table: Childminders: Holiday operation – holidays open

	Yes	No	Don't know
Summer	148	3	2
October half term	119	13	21
Christmas	60	70	23
Feb half term	121	13	19
Easter	121	10	22
May half term	110	16	27

Chart: Childminders: holiday operation – holidays open

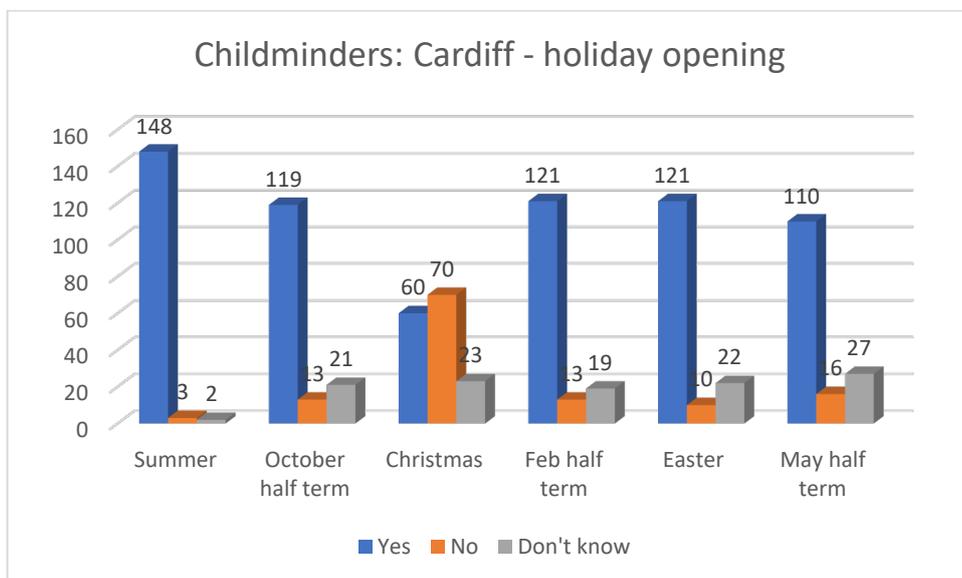
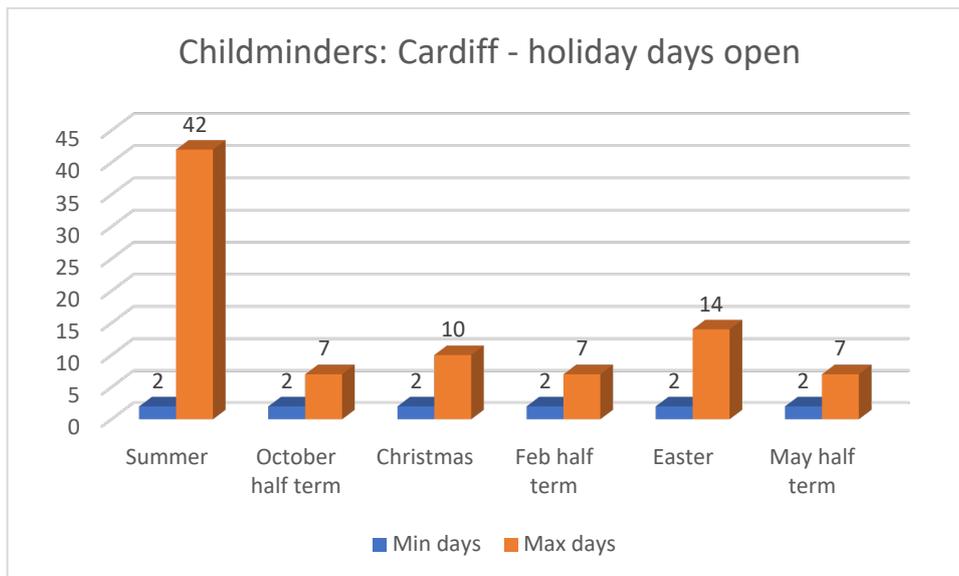


Table: Childminders: holidays – holiday days open

	Minimum days open days	Maximum days open days
Summer	2	42
October half term	2	7
Christmas	2	10
Feb half term	2	7
Easter	2	14
May half term	2	7

Chart: Childminders: holidays – holiday days open

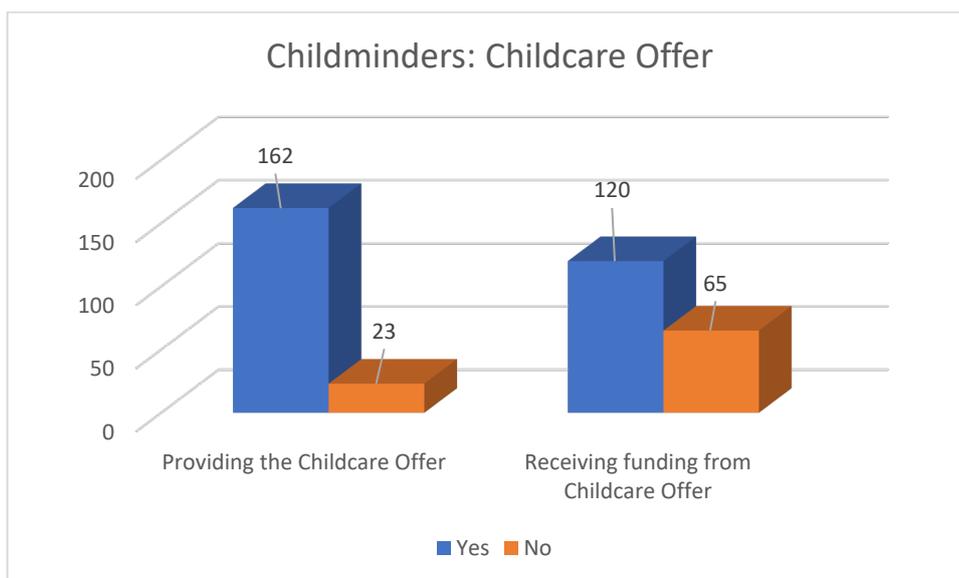


Childminders: Childcare Offer

Table: Childminders: Childcare Offer

	Yes	No
Providing the Childcare Offer	162	23
Receiving funding from Childcare Offer	120	65

Chart: Childminders: Childcare Offer

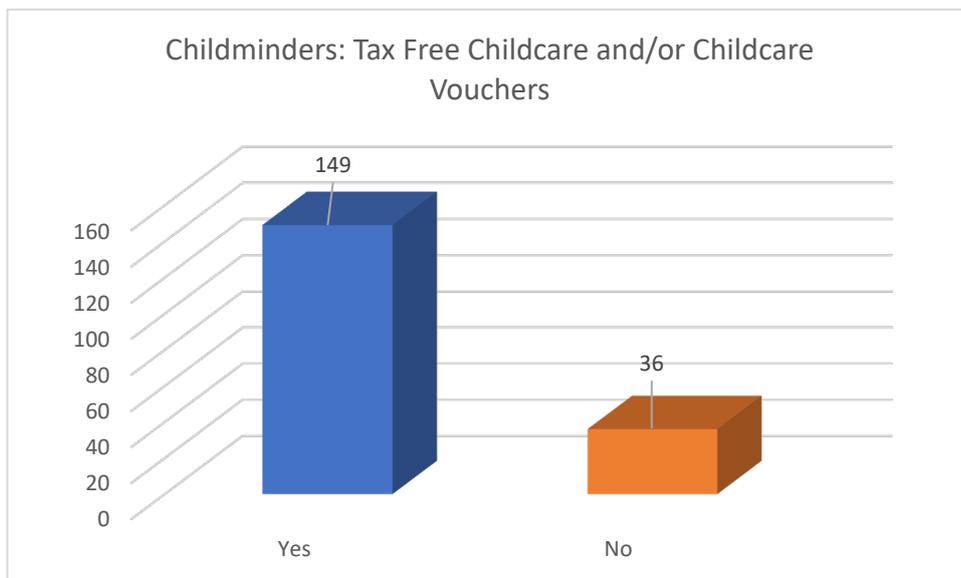


Childminders: Tax Free Childcare or childcare vouchers

Table: Childminders with parents using Tax Free Childcare or childcare vouchers.

with parents using Tax Free Childcare or childcare vouchers	
Yes	149
No	36

Chart: Childminders with parents using Tax Free Childcare or childcare vouchers.



Childminders: Summary of strengths and weaknesses.

Strengths:

- Childminders operate in all NPAs across Cardiff
- Capacity exists across all services, in all NPAs, except for 3 children waiting for a half day care PM place in City and Cardiff South.

Weaknesses:

- Limited Welsh language provision across all NPA's
- Data robustness: 86 childminders reported an average of 197 children per week attending for an Early Education Placement (A local authority funded nursery education placement). The Local Authority reports that no children are funded to attend childminders for this provision in Cardiff.

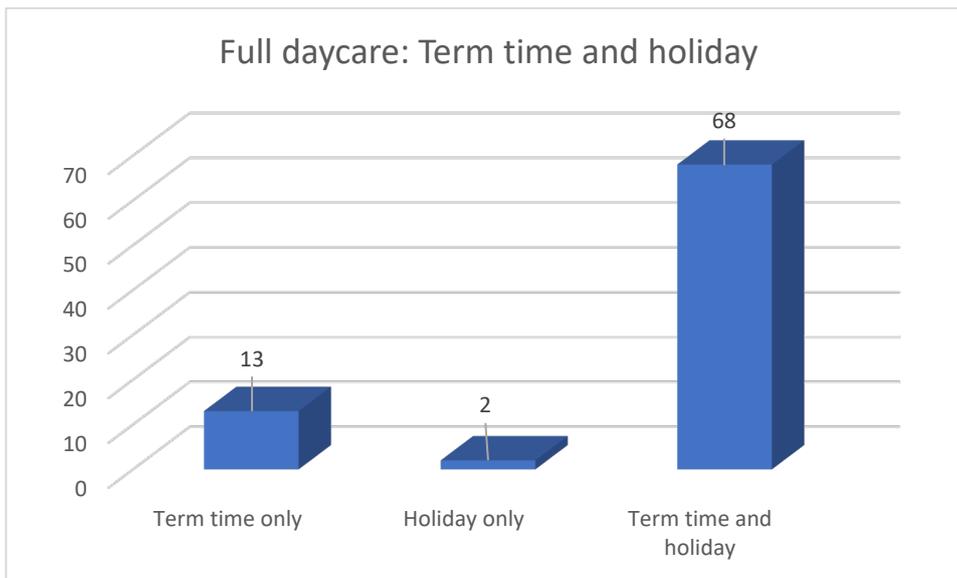
7.2 Full Daycare nursery

Table: Full daycare headline data

The following data tables and charts are based on data collected via SASS

Number of Registered Settings	83	Term time only	13
		Term time and holiday	2
		Holiday only	68
Number of Registered Places	4005		
Number of children on books by age	5379		
Number of children by attendance	5441	Full time	708
		Part time	4551
		Ad hoc	182
Main Language of setting			
English/Both	64/6		
Welsh	13	Provide active offer	20
		Working towards active offer	29
Flying Start provision	9		
Flying Start and fee paying	7		
Only Flying Start	2		
Number Providing Childcare Offer	76		
(Number Funded via Childcare Offer)	(75)		
Number Offering Tax Free Childcare or Vouchers	79		

Chart: Full daycare: Term time and holidays



- The majority of full daycare operates year-round (68)

Table: Full daycare: setting by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Full daycare	23	6	14	7	17	16	83

Chart: Full daycare: settings by NPA

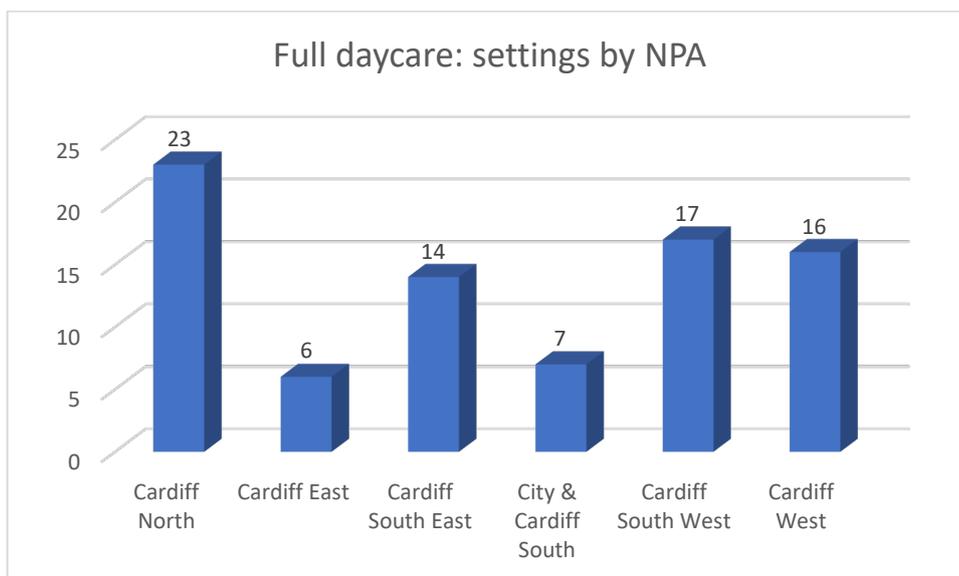
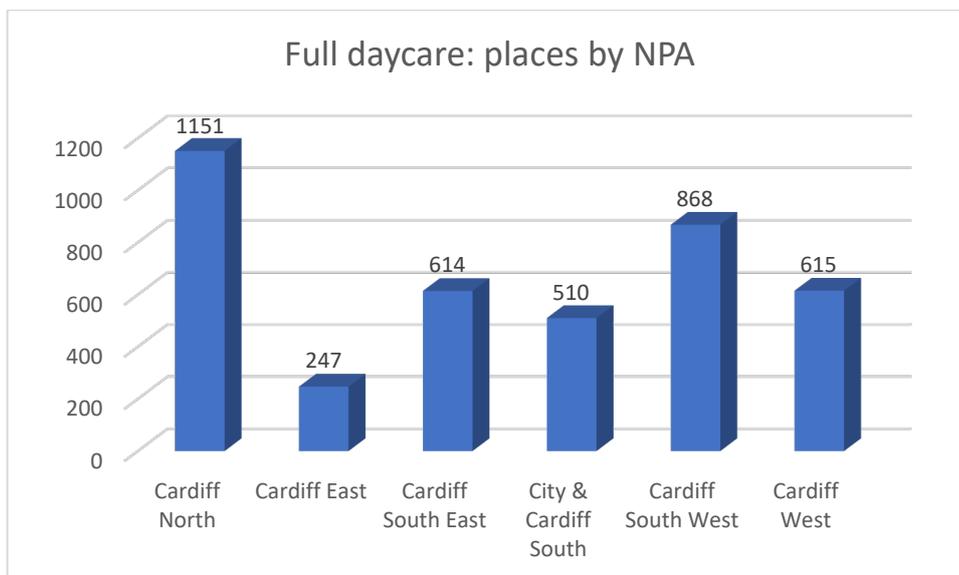


Table: Full daycare: places by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Total	1151	247	614	510	868	615	4005

Chart: Full daycare places by NPA



- The largest number of full daycare settings operate in Cardiff North (23 settings, 1151 places) and the smallest number are in Cardiff East (6 settings, 247 places)

NB: whilst the registration type suggest children can attend provision all day, 17 full daycare providers do not provide full daycare/full day nursery, but instead provide a range of services from a provision that is open all day. The National Minimum Standards for Regulated Childcare for children up to the age of 12 years (NMS) state that a full daycare registration “*may include day nurseries, children’s centres, and some family centres offering full or part time care, including before and after school provision, wrap around care, provision during the school holidays, funded education places and free childcare places. It can also encompass settings offering a variety of sessional care services throughout the course of that day. (“Full Day Sessional Care Mixed Provision”)* These can include Welsh and English medium playgroups, Cylchoedd Meithrin, wrap around care, funded education places and free childcare places.”

Table: Services provided by settings registered as full daycare settings where 'full daycare' is not provided

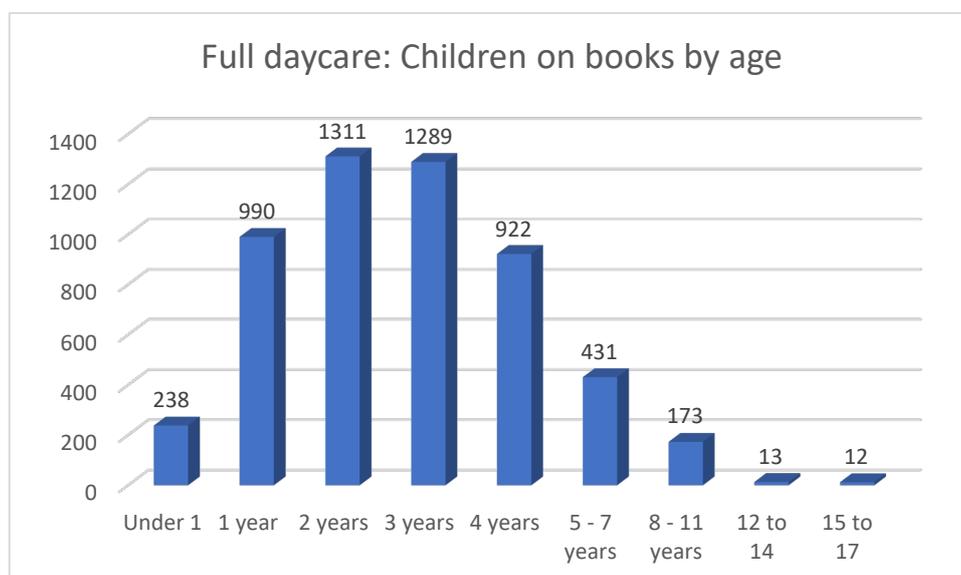
Service	Number providing
Before school	9
Half day nursery/half day care AM	4
Playgroup/Meithrin AM	10
Early education placement	11
Lunch	11
Half day nursery/half day care AM	4
Playgroup/Meithrin PM	8
After school	8

Full daycare: Children on the books by age

Table: Full daycare: Children on the books by age

Full daycare	Number of children
Under 1	238
1 year	990
2 years	1311
3 years	1289
4 years	922
5 - 7 years	431
8 - 11 years	173
12 to 14	13
15 to 17	12

Chart: Full daycare: Children on the books by age

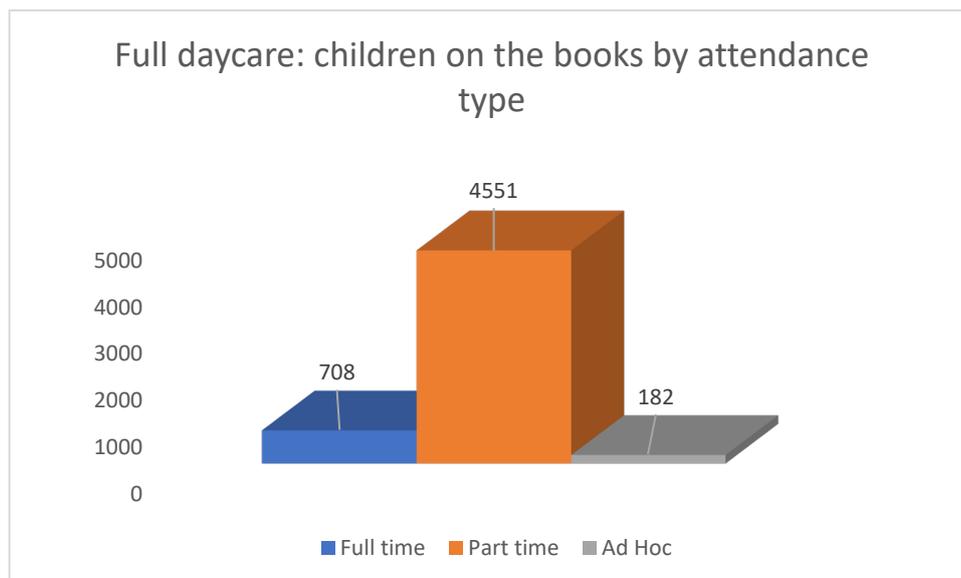


Full daycare: children on the books by attendance type

Table: Full daycare: children on the books by attendance type

Full time	708
Part time	4551
Ad Hoc	182

Chart: Full daycare: children on the books by attendance type



- 4512 of the 5379 children reported by age are aged 1-4, with the highest numbers of children aged 2 years (1311) or 3 years old (1289).
- The majority of children (4551 of the 5441 children reported on by attendance type) attended on a part time basis

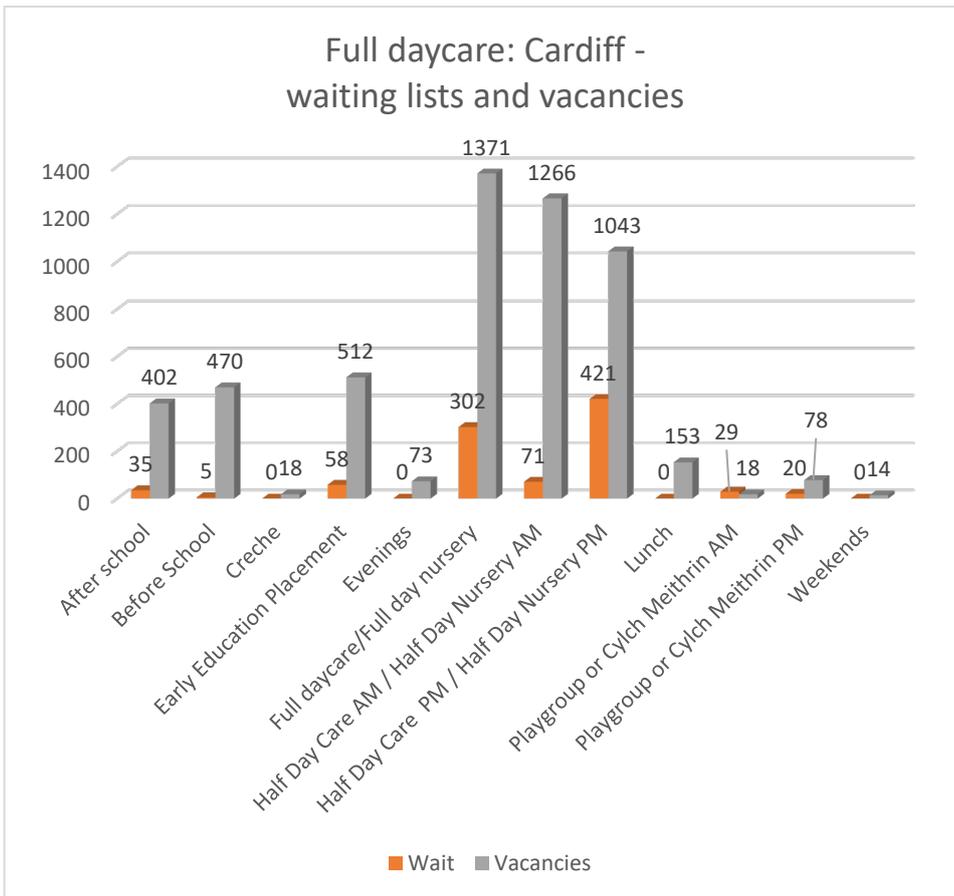
Full daycare: Cardiff – Waiting lists and vacancies

Table: Full daycare: Cardiff – Waiting lists and vacancies

Full Daycare	Wait	Vacancies
Afternoons	0	0
After school	35	402
Before School	5	470
Creche	0	18
Early Education Placement	58	512
Evenings	0	73
Full daycare/Full day nursery	302	1371
Half Day Care AM / Half Day Nursery AM	71	1266

Half Day Care PM / Half Day Nursery PM	421	1043
Lunch	0	153
Playgroup or Cylch Meithrin AM	29	18
Playgroup or Cylch Meithrin PM	20	78
Weekends	0	14
Settings in ward	611	5251

Chart: Full daycare: Cardiff – Waiting lists and vacancies



- Overall, there are more vacancies across Cardiff Full daycare settings (5,251) than there are children on waiting lists (611)
- However, there are some services in some NPAs showing a greater number of children waiting for an immediate place than there are vacancies, as shown in the table below.

Table: Children on waiting list exceed vacant places, by NPA and service.

NPA	Service	Children on waiting list for an immediate place	Vacancies	Shortfall
Cardiff East	Half daycare PM/ Half Day Nursery PM	23	18	5
City & Cardiff South	Half daycare PM/ Half Day Nursery PM	318	276	42
Cardiff South West	Full daycare/Full day nursery	86	62	24
	Half daycare AM/ Half Day Nursery AM	49	31	18
	Half daycare PM/ Half Day Nursery PM	49	33	16
Cardiff West	Early Education	49	1	48
	Full daycare/Full day nursery	66	5	61
	Half daycare AM/ Half Day Nursery AM	7	5	2
	Playgroup or Cylch Meithrin AM	15	10	5
Totals		662	441	221

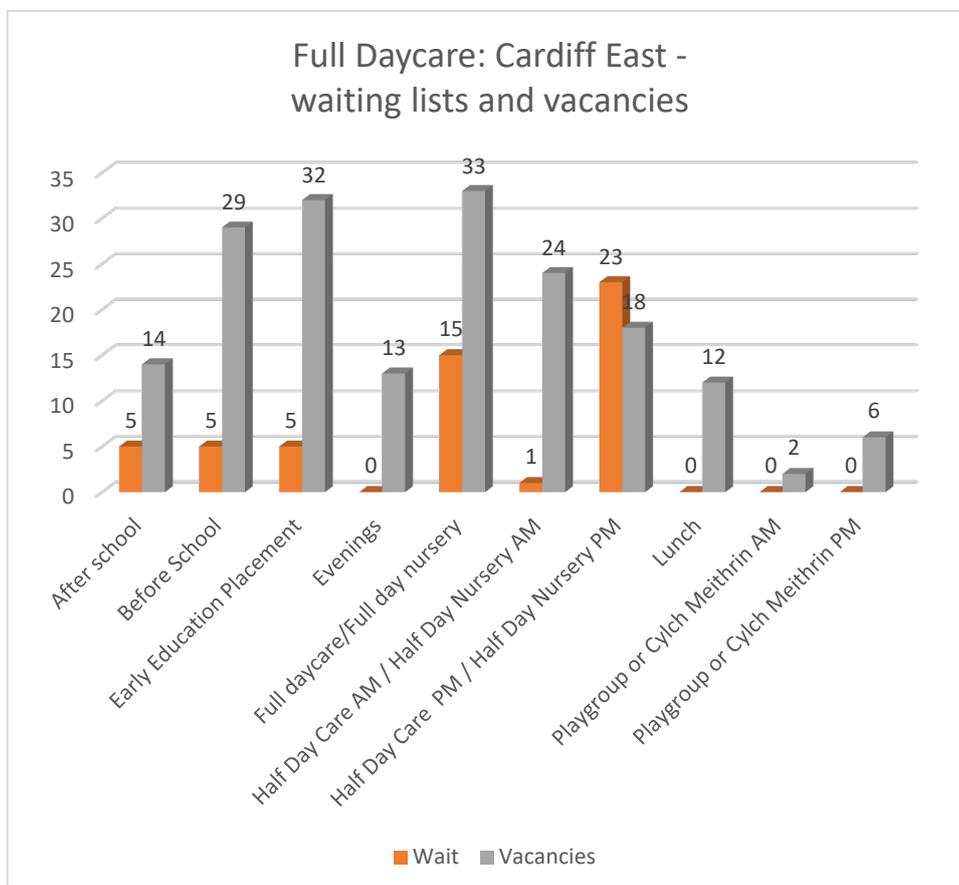
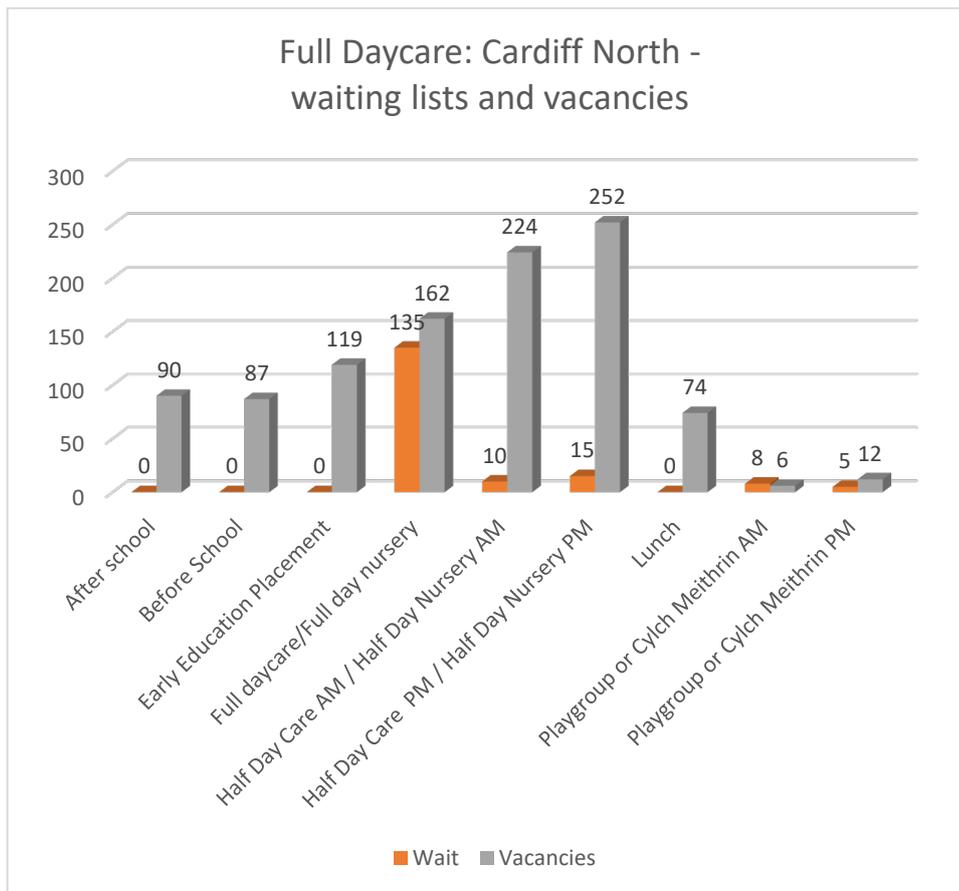
- It is not clear whether the shortfall figure of 221 places in total is accurate.
- Respondents may not have followed guidance to only include children waiting for an immediate place (demand above capacity) as opposed to children waiting for a place that is age related.
- Education report there are no children awaiting an early education placement in a full daycare setting in Cardiff West (or Cardiff)

- Children may be attending a setting whilst on the waiting list for an immediate place at another setting or settings. Therefore, the number of children waiting for an immediate place may not indicate demand above capacity but reflect parental preference.

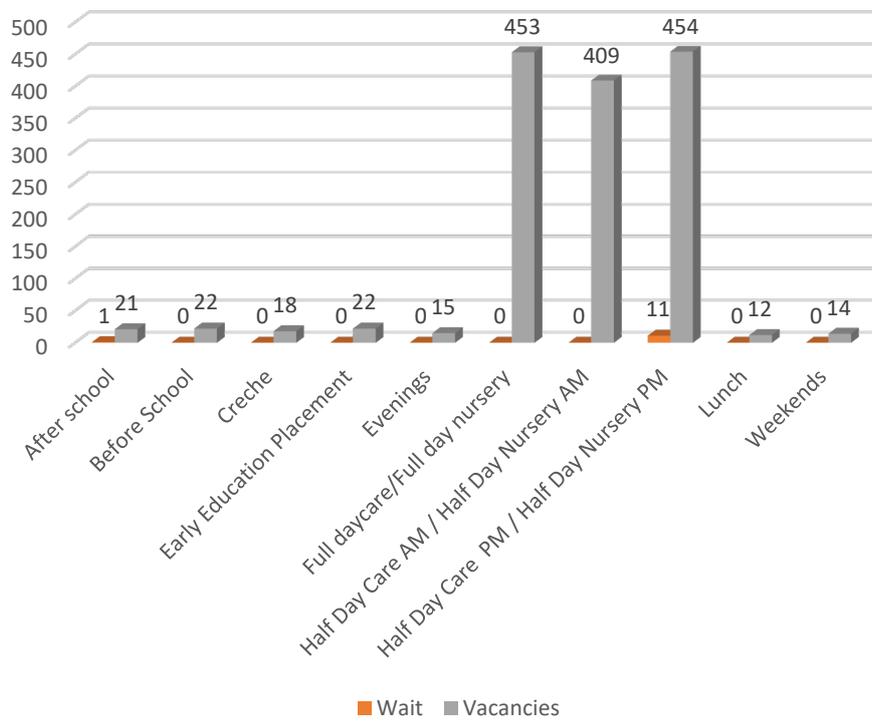
Table: Full daycare: By NPA – waiting lists and vacancies

	Cardiff North		Cardiff East		Cardiff South East		City & Cardiff South		Cardiff South West		Cardiff West	
	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies
Full Daycare												
Afternoons	0	0	0	0	0	0	0	0	0	0	0	0
After school	0	90	5	14	1	21	0	54	29	187	0	36
Before School	0	87	5	29	0	22	0	50	0	251	0	31
Creche	0	0	0	0	0	18	0	0	0	0	0	0
Early Education Placement	0	119	5	32	0	22	2	52	2	276	49	11
Evenings	0	0	0	13	0	15	0	45	0	0	0	0
Full daycare/Full day nursery	135	162	15	33	0	453	0	656	86	62	66	5
Half Day Care AM / Half Day Nursery AM	10	224	1	24	0	409	4	573	49	31	7	5
Half Day Care PM / Half Day Nursery PM	15	252	23	18	11	454	318	276	49	33	5	10
Lunch	0	74	0	12	0	12	0	0	0	55	0	0
Playgroup or Cylch Meithrin AM	8	6	0	2	0	0	6	0	0	0	15	10
Playgroup or Cylch Meithrin PM	5	12	0	6	0	0	0	1	0	0	15	59
Weekends	0	0	0	0	0	14	0	0	0	0		

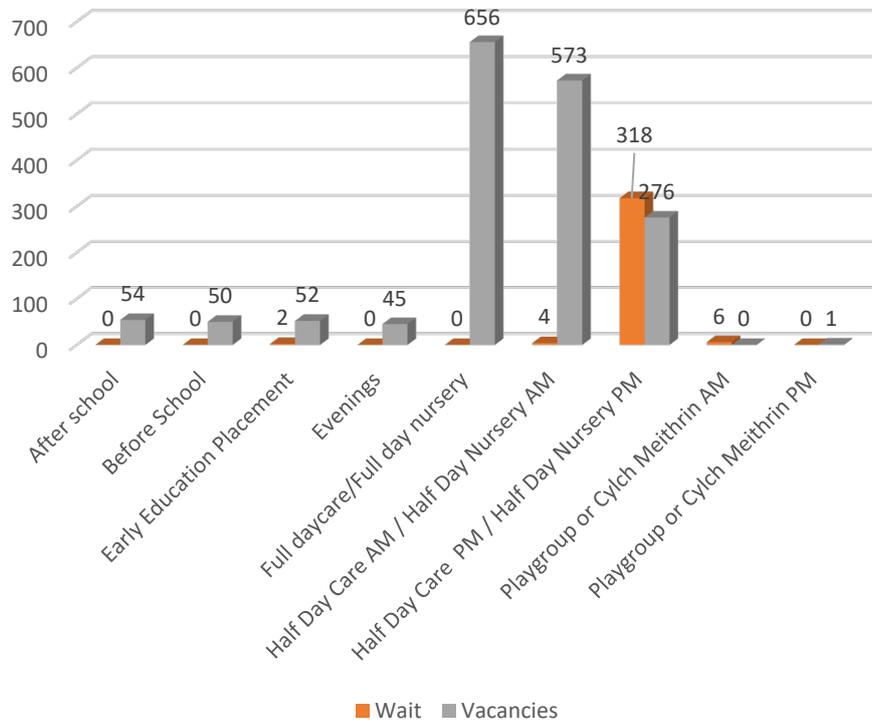
Charts: Full daycare – waiting lists and vacancies by NPA



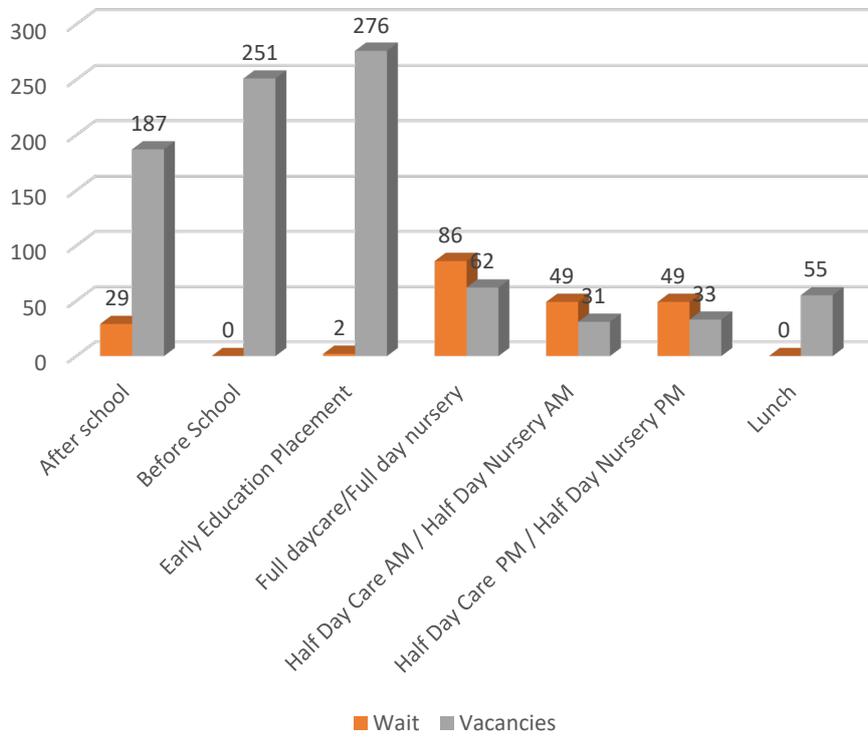
Full Daycare: Cardiff South East - waiting lists and vacancies



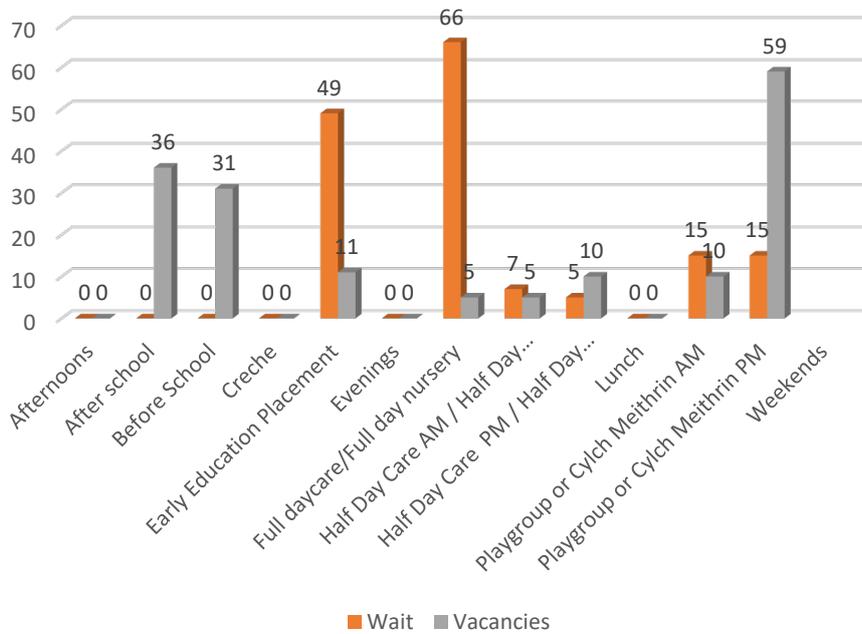
Full Daycare: City & Cardiff South - waiting lists and vacancies



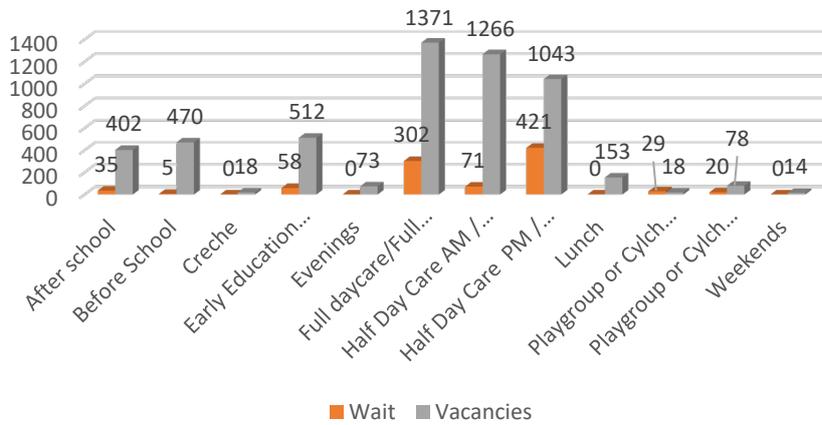
Full Daycare: Cardiff South West - waiting lists and vacancies



Full daycare: Cardiff West - waiting lists and vacancies



Full daycare: Cardiff - waiting lists and vacancies

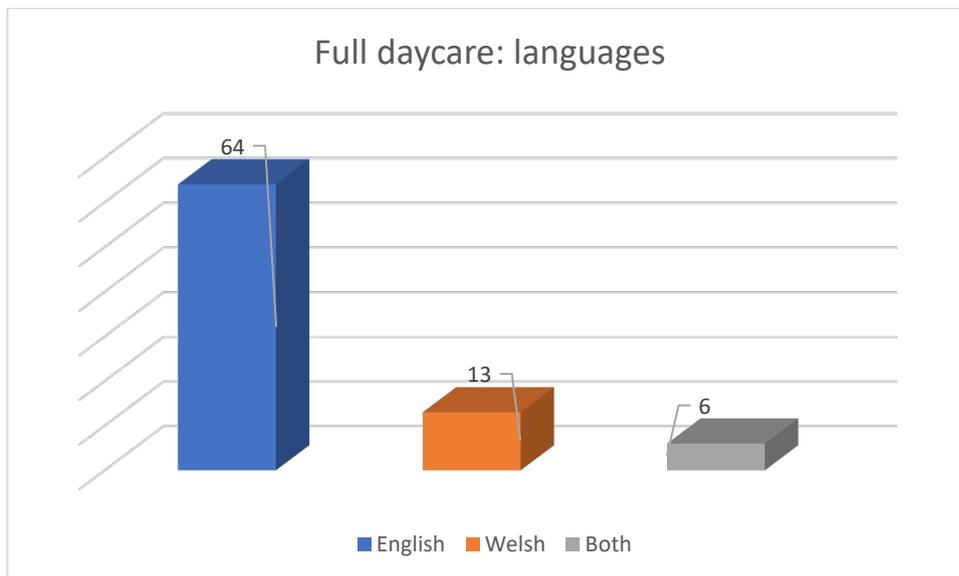


Full daycare: languages

Table: Full daycare: languages

English	64
Welsh	13
Both	6

Chart: Full daycare: languages

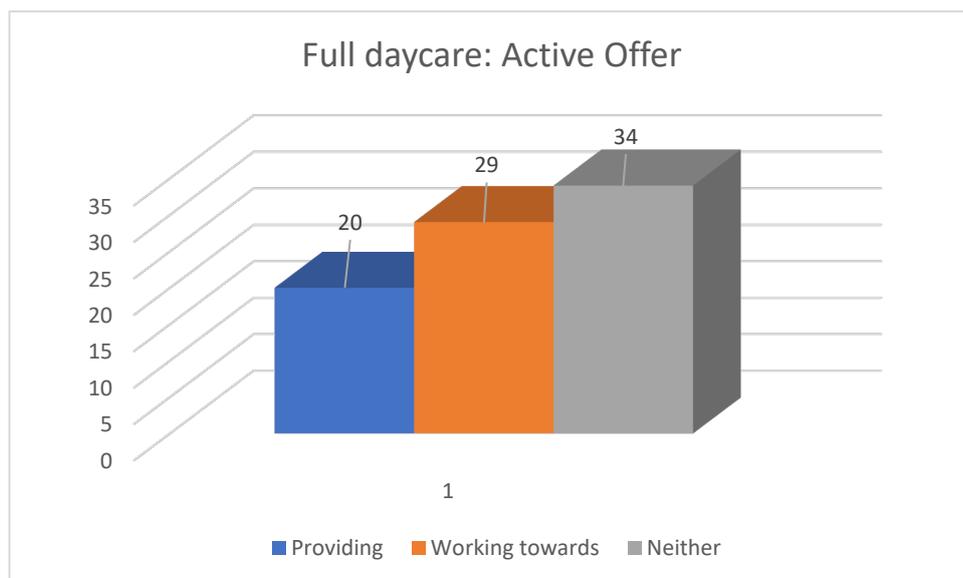


Full daycare: Active Offer

Table: Full daycare: Active Offer

	Full daycare
Providing	20
Working towards	29
Neither	34

Chart: Full daycare: Active Offer



Full daycare – other languages

Table: Full daycare – other languages

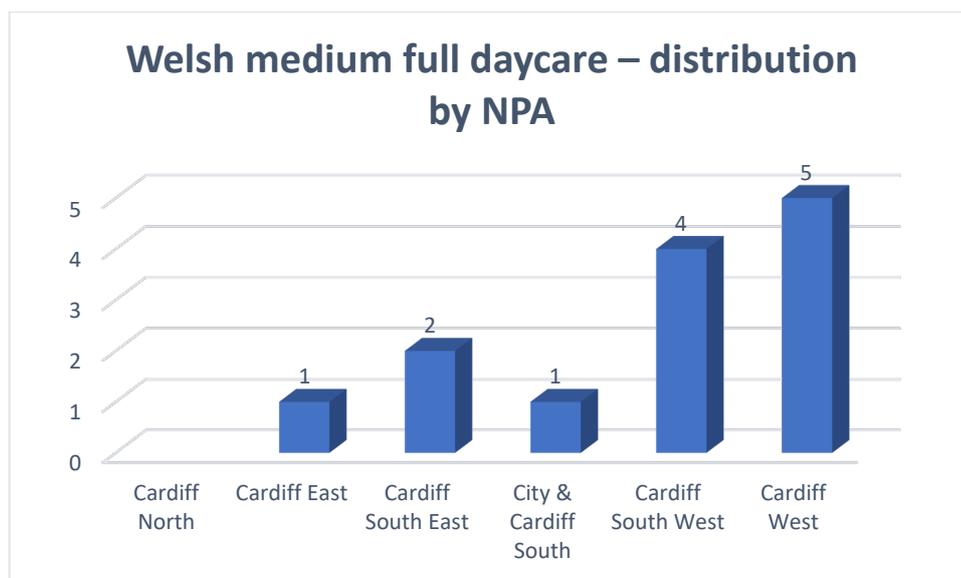
Welsh	23
English	5
English/Welsh	0
Makaton/Welsh	1
Bengali / Chinese / French / Italian / Polish / Spanish / Urdu / Welsh	1
English / Welsh	1
French / Polish / Welsh	1
Italian / Spanish	1

Full daycare: Welsh language – distribution by NPA

Table: Welsh medium full daycare – distribution by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Full daycare	-	1	2	1	4	5	13

Chart: Welsh medium full daycare – distribution by NPA



- There are a total of 13 Welsh medium full daycare settings in Cardiff, with 5 in Cardiff West, 4 in Cardiff South West, 2 in Cardiff South East, 1 in Cardiff East and City & South, but none in Cardiff North
- 20 full daycare settings deliver the Active Offer, with a further 29 working towards delivery of the Active Offer.

Full daycare – fees by age

Table: Full daycare – fees; under 1

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Under 1					
Highest	£4.50	£62.00	£62.00	£310.00	-
Lowest	£4.50	£26.50	£46.50	£184.00	-
Mode	£4.50	£35.00	£60.00	£270.00	-

Chart: Full daycare – fees; under 1

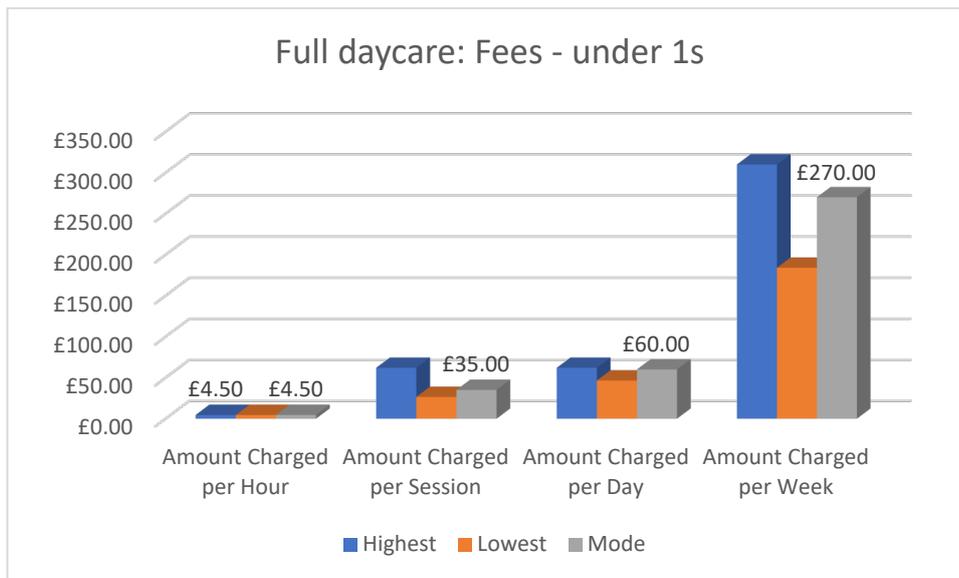


Table: Full daycare – fees; 1 year olds

1 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	£5.30	£62.00	£66.00	£310.00	-
Lowest	£4.50	£26.50	£46.50	£184.00	-
Mode	N/A	£33.00	£60.00	£270.00	-

Chart: Full daycare – fees; 1 year olds

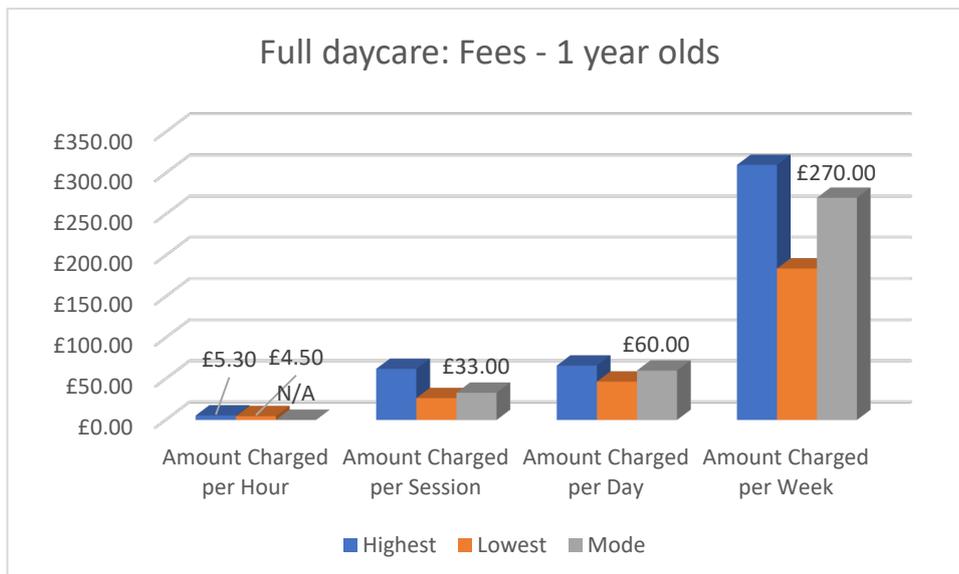


Table: Full daycare – fees; 2 year olds

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
2 year olds					
Highest	£64.00	£46.00	£64.00	£310.00	-
Lowest	£5.30	£25.50	£45.50	£184.00	-
Mode	N/A	£33.00	£60.00	£270.00	-

Chart: Full daycare – fees; 2 year olds

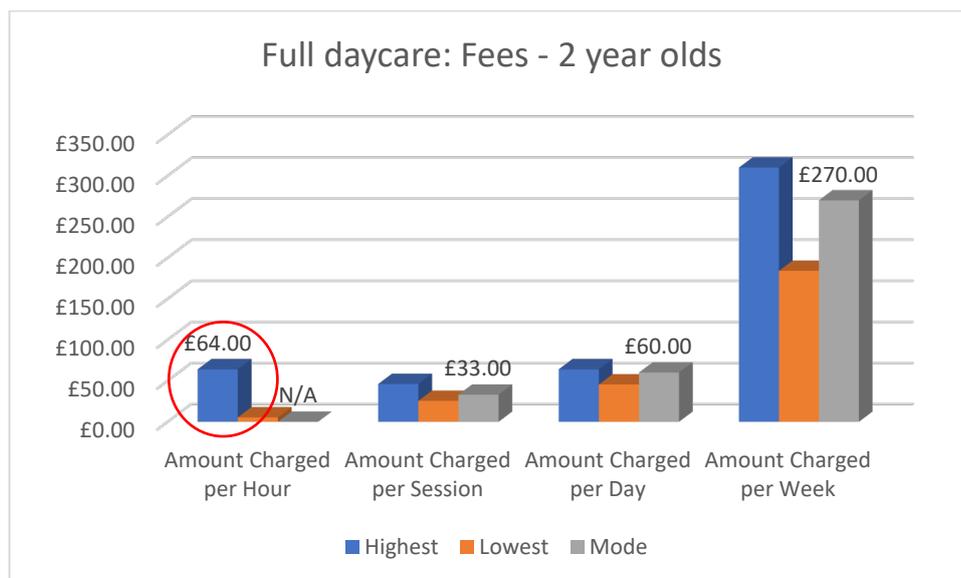


Table: Full daycare – fees; 3 year olds

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
3 year olds					
Highest	£5.45	£59.00	£62.00	£300.00	-
Lowest	£4.50	£12.00	£30.00	£155.00	-
Mode	N/A	£31.00	£60.00	£270.00	-

Chart: Full daycare – fees; 3 year olds

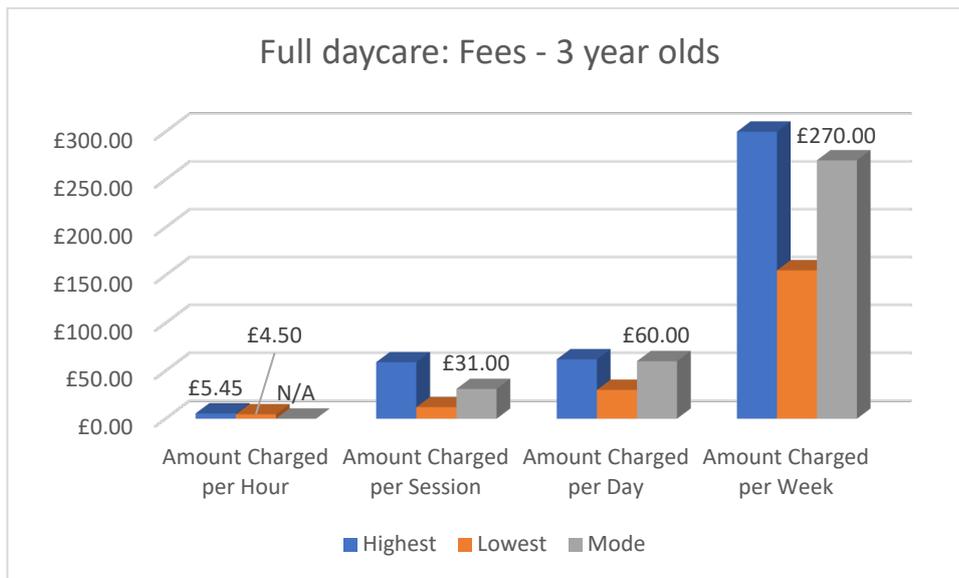


Table: Full daycare – fees; 4 year olds

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
4 year olds					
Highest	£5.30	£45.00	£61.00	£280.00	£209.00
Lowest	£4.50	£12.00	£30.00	£184.00	£209.00
Mode	N/A	£31.00	£60.00	£270.00	£209.00

Chart: Full daycare – fees; 4 year olds

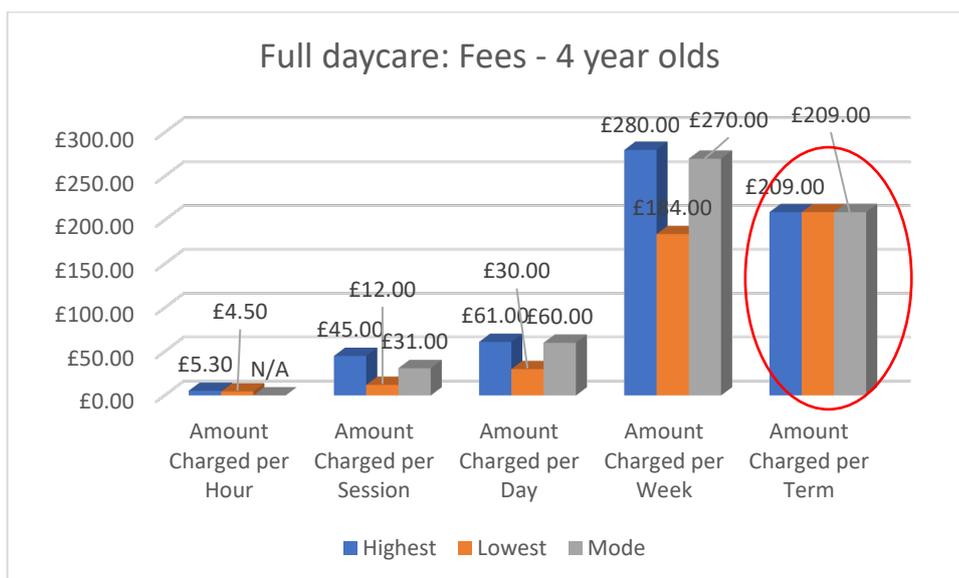


Table: Full daycare – fees; 5-7 year olds

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
5-7 year olds					
Highest	£5.00	£38.00	£59.95	£270.00	£7.25
Lowest	£5.00	£7.25	£16.00	£230.00	£7.25
Mode	£5.00	N/A	£55.00	N/A	£7.25

Chart: Full daycare – fees; 5-7 year olds

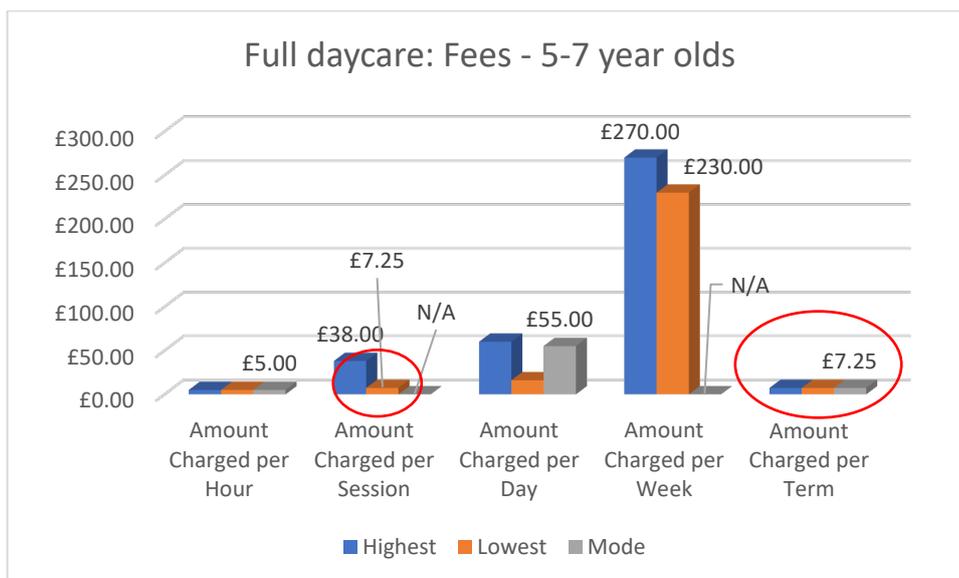


Table: Full daycare – fees; 8-11 year olds

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
8-11 year olds					
Highest	£5.00	£19.50	£43.00	-	-
Lowest	£5.00	£11.00	£16.00	-	-
Mode	£5.00	N/A	N/A	-	-

Chart: Full daycare – fees; 8-11 year olds

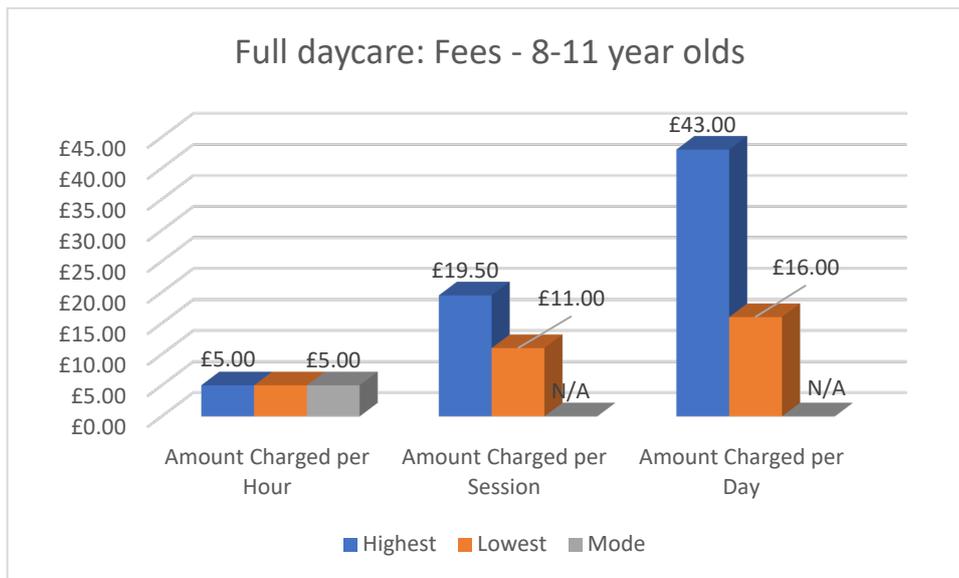
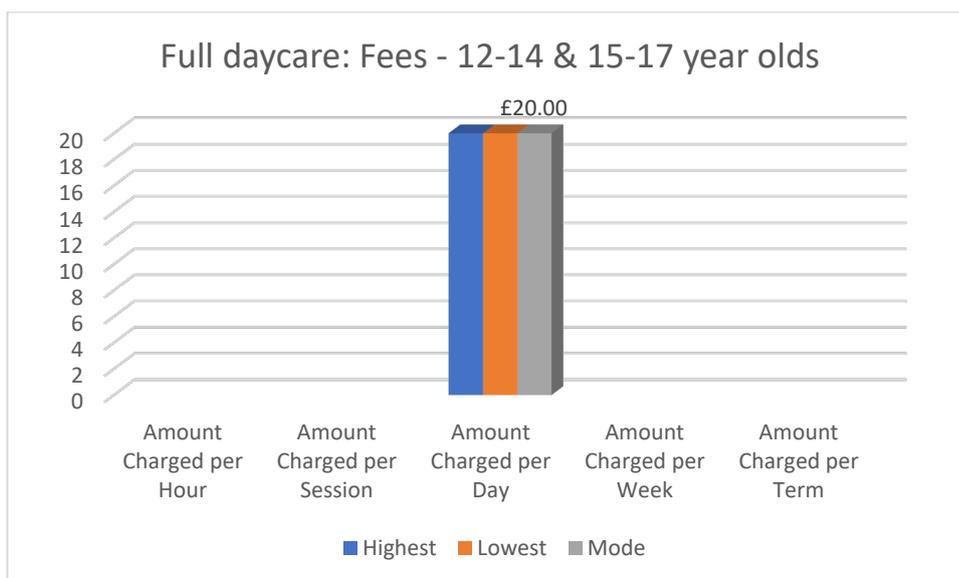


Table: Full daycare – fees; 12-14 & 15–17 year olds

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
12-14 & 15–17 year olds					
Highest	-	-	£20.00	-	-
Lowest	-	-	£20.00	-	-
Mode	-	-	£20.00	-	-

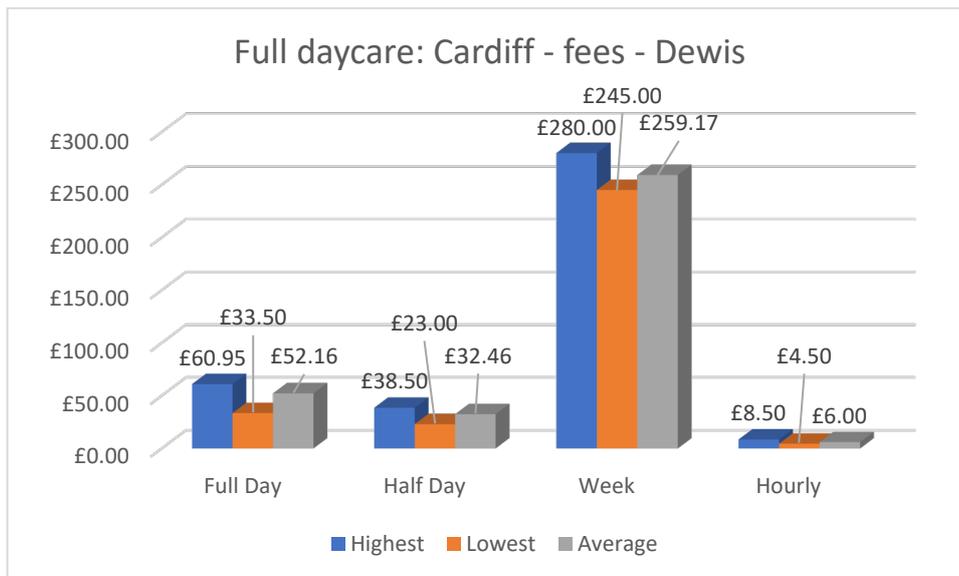
Chart: Full daycare – fees; 12-14 & 15–17 year olds



Full daycare: Cardiff - fees as per Dewis records

Day care	Highest	Lowest	Average
Full Day	£60.95	£33.50	£52.16
Half Day	£38.50	£23.00	£32.46
Week	£280.00	£245.00	£259.17
Hourly	£8.50	£4.50	£6.00

Chart: Full daycare: Cardiff - fees as per Dewis records



- The modal sessional rate for children aged 0-4 is between £33.00 and £35.00. The modal rates per day and per week are £60.00 and £270.00 respectively. Due to data variations and missing data it is not possible to identify a modal hourly rate for children aged 0-4 although rates of between £5.00 to £5.45 are frequently reported. This may be because younger children tend to be booked for half day or full day sessions.
- The data relating to older children is varied, with a modal daily rate of £55.00 for 5-7 year olds, dropping to £20.00 for 12 -17 year olds, though it is not usual for full daycare to provide for children of this age.
- Dewis data indicates an average hourly rate of £6.00, an average daily rate of £52.16, and an average weekly rate of £259.17. Dewis data is not broken down by age.

Full daycare: Opening hours and atypical hours

Table: Full daycare: Cardiff – range of opening hours

Cardiff	Earliest opening time	Latest opening time	Earliest closing time	Latest closing time	Number of settings open before 8 am	Number of settings open after 6 pm
Monday	7.00	12.00	12.20	19.00	45	9
Tuesday	7.00	12.00	12.20	19.00	45	9
Wednesday	7.00	12.00	12.20	19.00	45	9
Thursday	7.00	12.00	12.20	19.00	45	9
Friday	7.00	12.00	12.20	19.00	45	9
Saturday	7.30	12.00	17.30	18.00	1	0
Sunday	7.30	12.00	18.00	18.00	1	0

Chart: Full daycare: Cardiff – range of opening hours

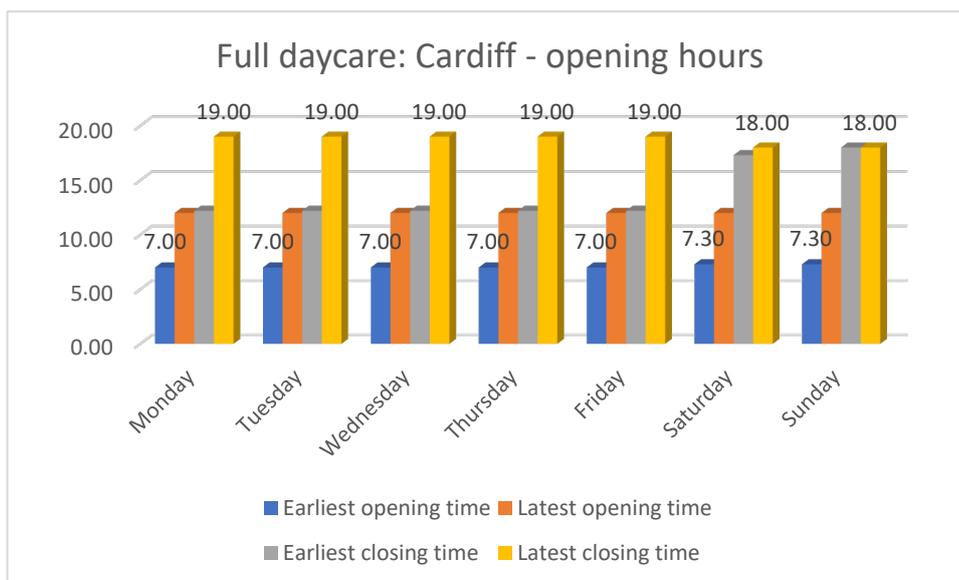
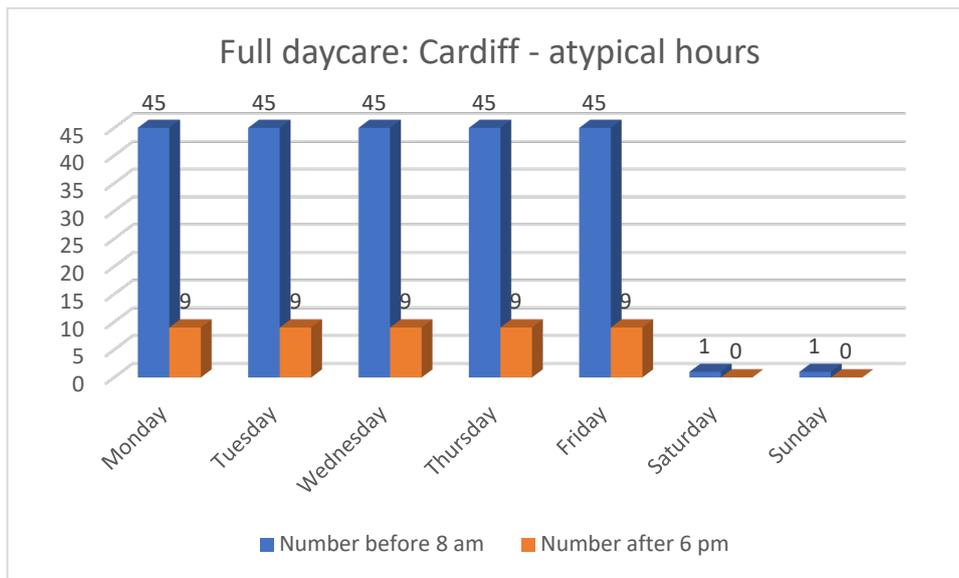


Chart: Childminders; Cardiff – setting open atypical hours



- 45 full daycare settings operate weekdays before 8am, and 9 operate weekdays after 6pm. The earliest start is 7.00 and the latest finish is 7.00 pm. One setting operate Saturdays and Sundays operating from 7.30 am until 6.00 pm.

Holidays

Table: Full daycare: Holiday operation – holidays open

	Yes	No	Don't know
Summer	66	3	1
October half term	60	6	4
Christmas	41	19	9
Feb half term	61	6	3
Easter	61	5	4
May half term	60	5	2

Chart: Full daycare: holiday operation – holidays open

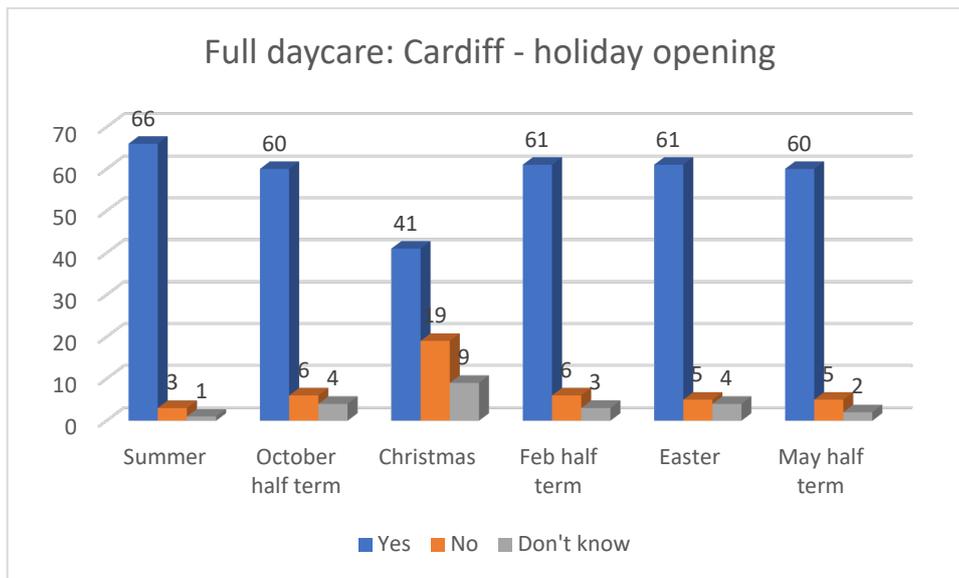
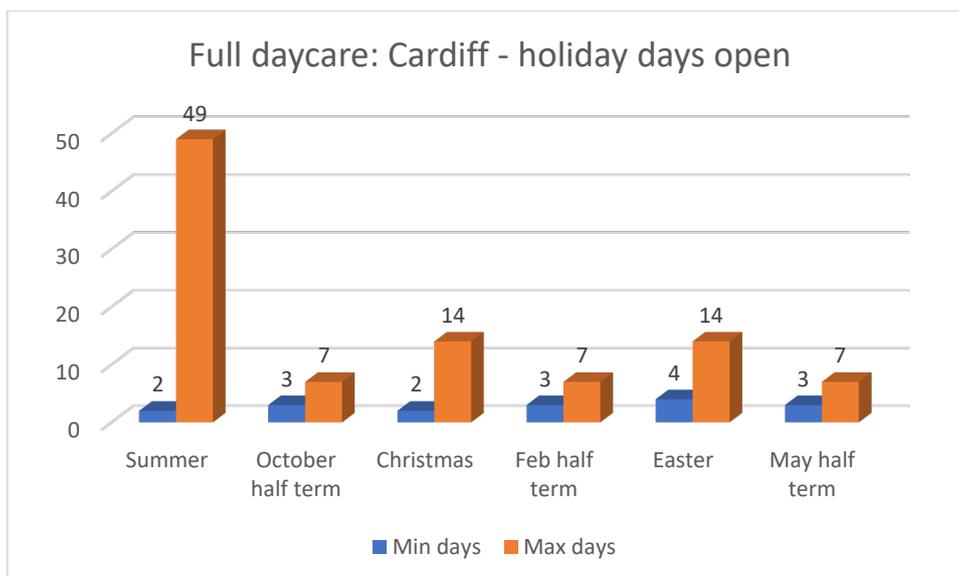


Table: Full daycare: holidays – holiday days open

	Minimum days open days	Maximum days open days
Summer	2	49
October half term	3	7
Christmas	2	14
Feb half term	3	7
Easter	4	14
May half term	3	7

Chart: Full daycare: holidays – holiday days open

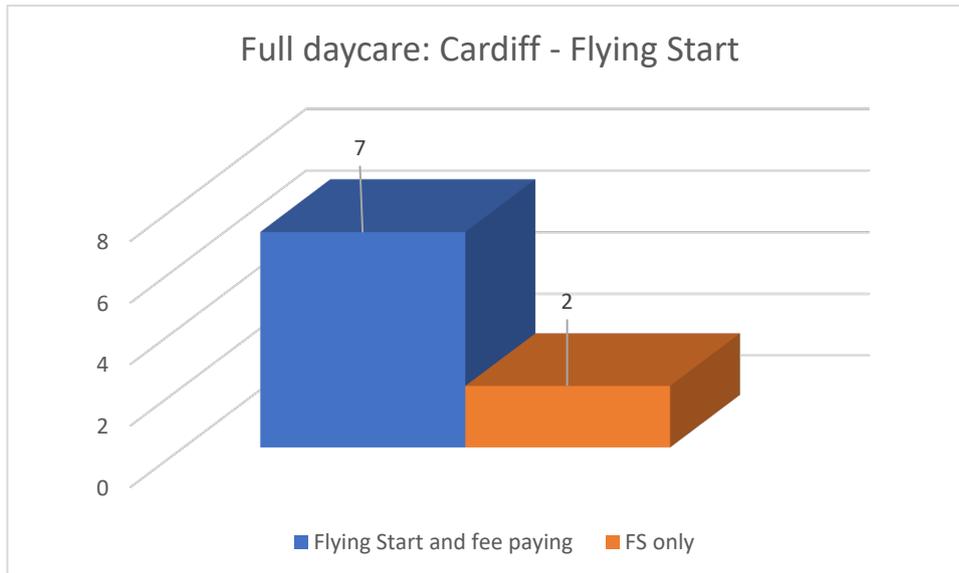


Full daycare – Flying Start

Table: Full daycare – Flying Start

Flying Start and fee paying	7
FS only	2

Chart: Full daycare – Flying Start

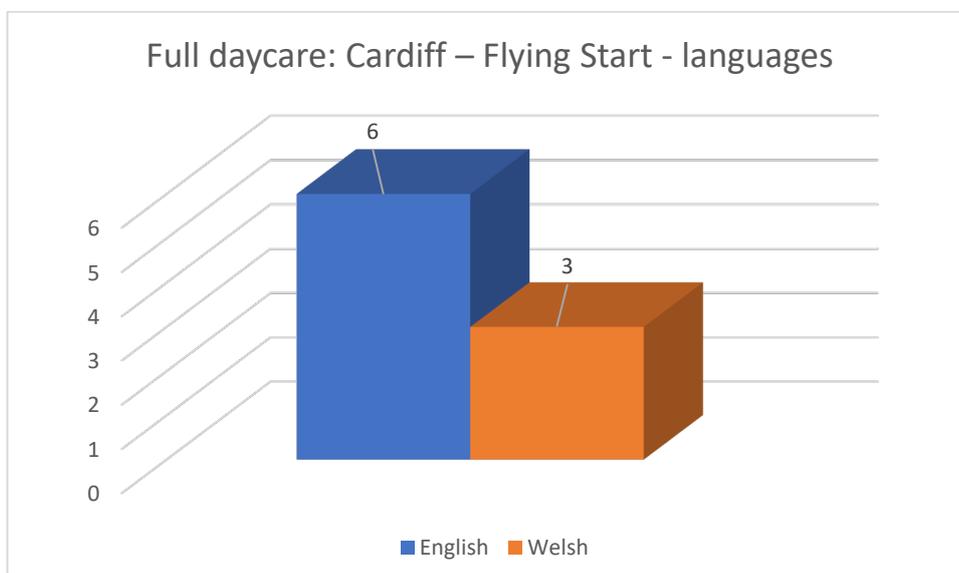


Full daycare: Flying Start – languages

Table: Full daycare: Cardiff – Flying Start – languages

English	6
Welsh	3

Chart: Full daycare: Cardiff – Flying Start – languages

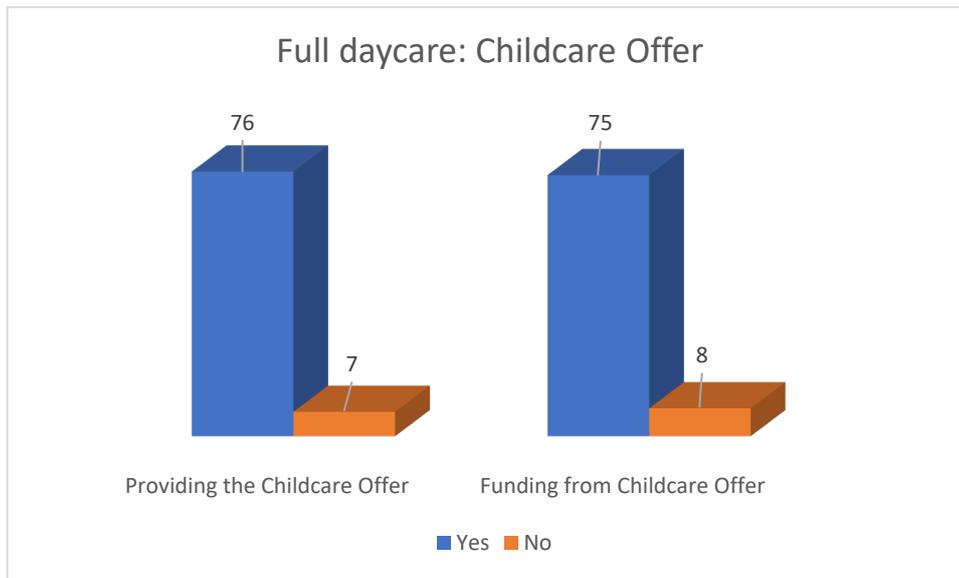


Full daycare: Childcare Offer

Table: Full daycare: Childcare Offer

	Yes	No
Providing the Childcare Offer	76	7
Receiving funding from Childcare Offer	75	8

Chart: Full daycare: Childcare Offer

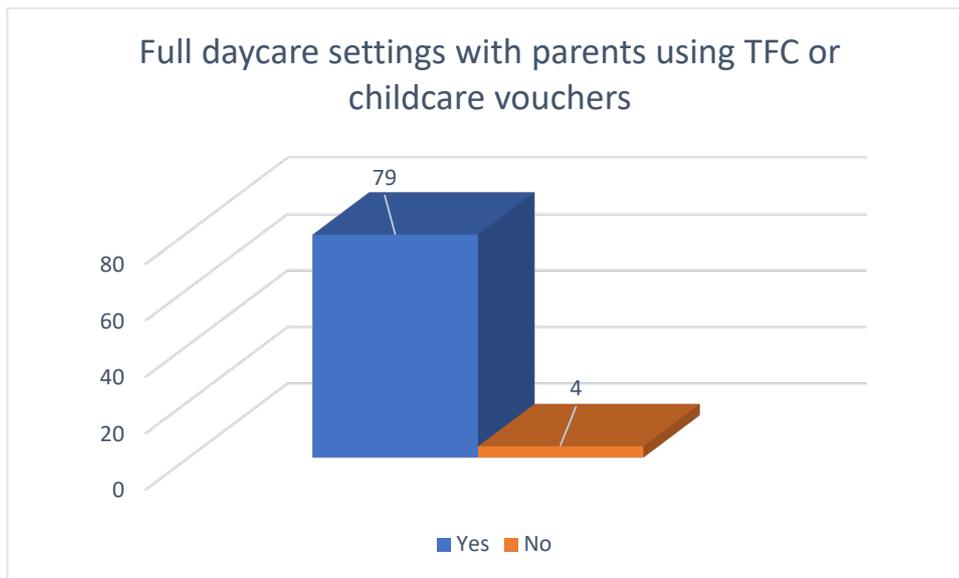


Full daycare: Tax Free Childcare or childcare vouchers

Table: Full daycare settings with parents using Tax Free Childcare or childcare vouchers.

Full daycare settings with parents using Tax Free Childcare or childcare vouchers	
Yes	79
No	4

Chart: Settings with parents using Tax Free Childcare or childcare vouchers.



Full daycare: Early Education

Table: Number of settings self-reporting being funded to provide 'early years part time education' vs. self-reporting children funded for Early Education Placements vs. funded by Education (Education department data)

Self-reporting being funded to provide 'early years part time education'/Early Education Placements	4
Self-reporting children funded for Early Education Placements	47
Registered with the Education department to provide Early Education Placements	4
Funded by Education (Education department data)	3

Full daycare: Summary of strengths and weaknesses.

Strengths:

- Full daycare settings operate in all NPAs across Cardiff
- There is significant capacity across most services. Four settings reported having 100 or more vacancies, with one reporting 342 vacancies.
- The majority of settings (76 of 83) provide the Childcare Offer, with 75 receiving funding
- The majority of settings (79 of 83) have parents who access Tax Free Childcare or childcare vouchers

Weaknesses:

- Limited Welsh language provision across all NPA's
- Data robustness: one setting has reported having 342 full day nursery vacancies and 297 half day nursery AM vacancies, but 314 children waiting for an immediate place for a half day nursery PM place. This level of data error impacts on the accuracy of the overall picture of demand and capacity. The Childcare Business Support Team will contact full daycare providers in the identified ward and seek to include corrected and accurate data in the post-consultation version of the CSA.
- Data robustness: 47 full daycare services reported an average of 2,146 children per week attending for an Early Education Placement (A local authority funded nursery education placement). The Local Authority reports that 21 children are funded to attend 3 full daycare settings for this service in Cardiff. Therefore, the maximum weekly attendance for an early education placement in full daycare settings is 105. (NB: As only 56 children in total are funded to attend non-maintained early education provision across full daycare and sessional settings, the maximum weekly attendance is 280)

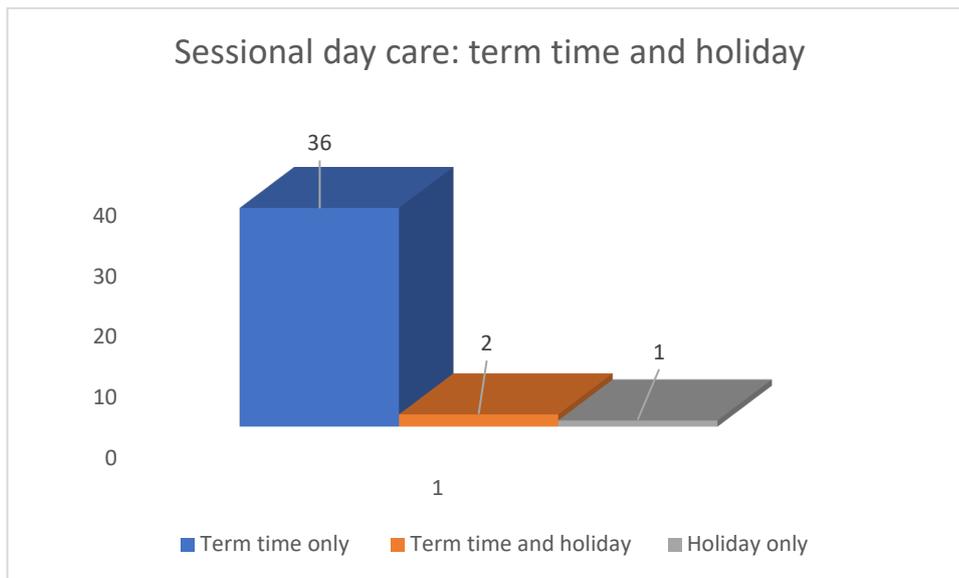
7.3. Sessional day care

The following data tables and charts are based on data collected via SASS

Table: Sessional day care headline data

Number of Registered Settings	39	Term time only	36
		Term time and holiday	2
		Holiday only	1
Number of Registered Places	1073		
Number of children on books by age	1336		
Number of children by attendance	1184	Full time	257
		Part time	902
		Ad hoc	25
Main Language of setting			
English/Both	33(2)		
Welsh	4	Provide Active Offer	
		Working towards Active Offer	
Flying Start provision	20		
Flying Start and fee paying	5		
Flying Start only	15		
Number Providing Childcare Offer	24		
(Number Funded via Childcare Offer)	(19)		
Number Offering Tax Free Childcare or Vouchers	13		

Chart: Sessional day care: term time and holidays



- The majority of sessional day care settings operate term-time only (36)

Table: sessional day care settings by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Total	9	7	5	2	8	8	39

Chart: sessional day care settings by NPA

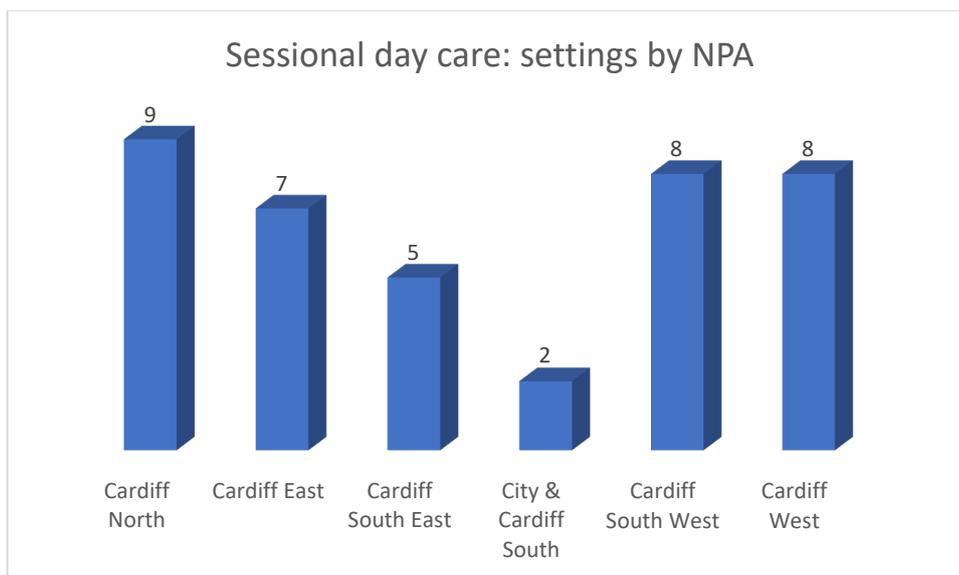
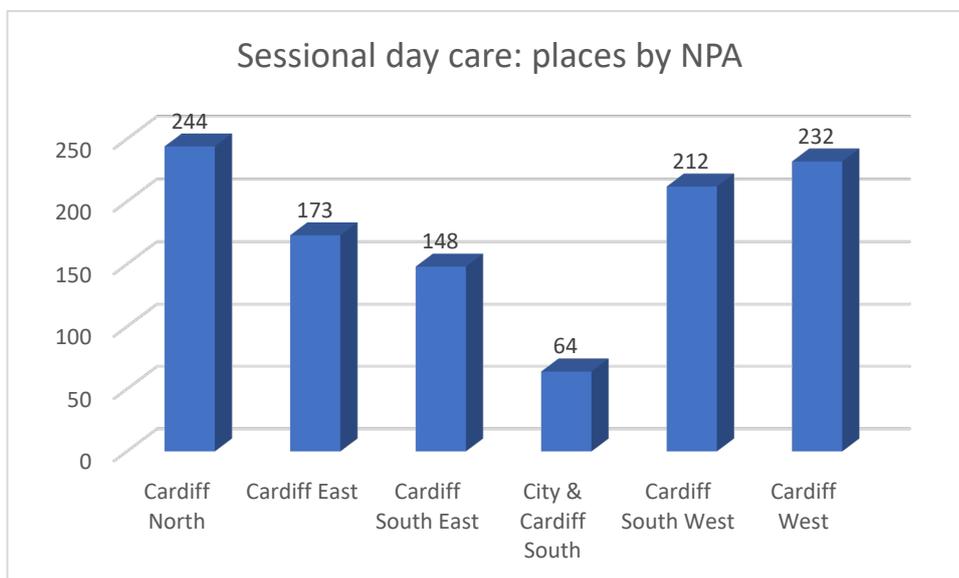


Table: sessional day care places by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Total	244	173	148	64	212	232	1073

Chart: sessional day care places by NPA



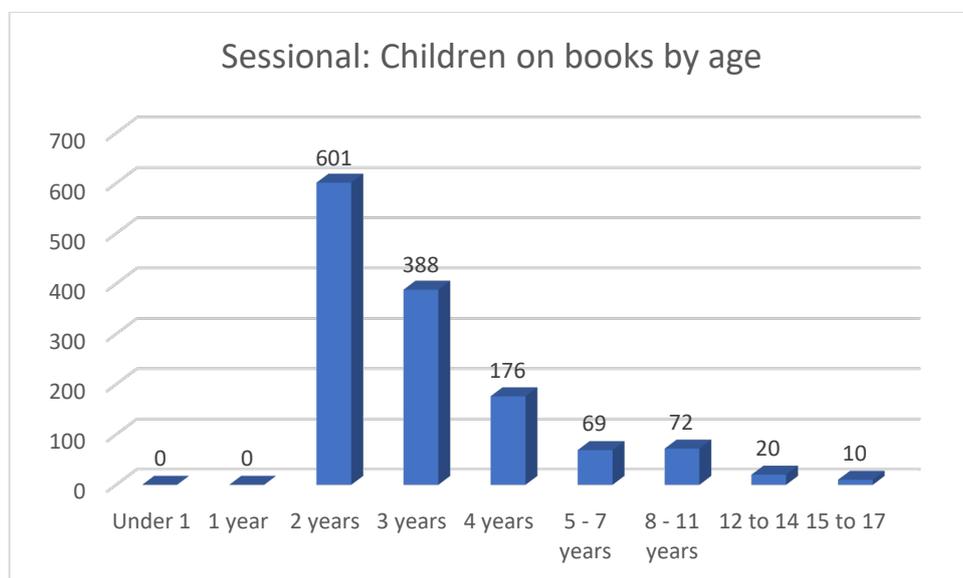
- There are 9 sessional day care providers in Cardiff North, 8 in Cardiff South West and Cardiff West. There are over 200 sessional day care places provided in each of these NPAs, with over 100 in Cardiff East (7 settings) and Cardiff South East (5 settings).

Sessional day care: children on the books by age

Table: Sessional day care: children on the books by age

Age	Number of children
Under 1	0
1 year	0
2 years	601
3 years	388
4 years	176
5 - 7 years	69
8 - 11 years	72
12 to 14	20
15 to 17	10

Chart: Sessional day care: children on the books by age

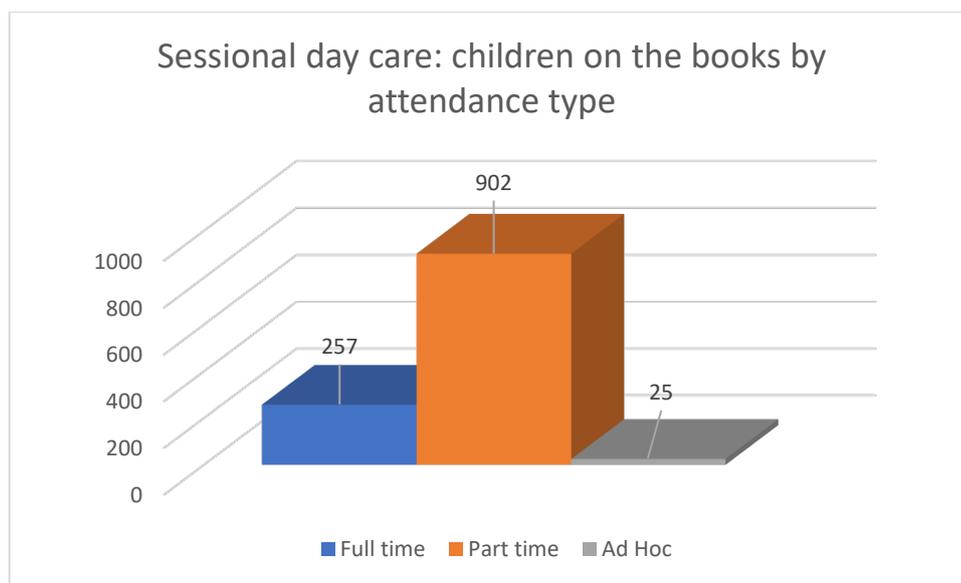


Sessional day care: children on the books by attendance type

Table: Sessional day care: children on the books by attendance type

Full time	257
Part time	902
Ad Hoc	25

Chart: Sessional day care: children on the books by attendance type



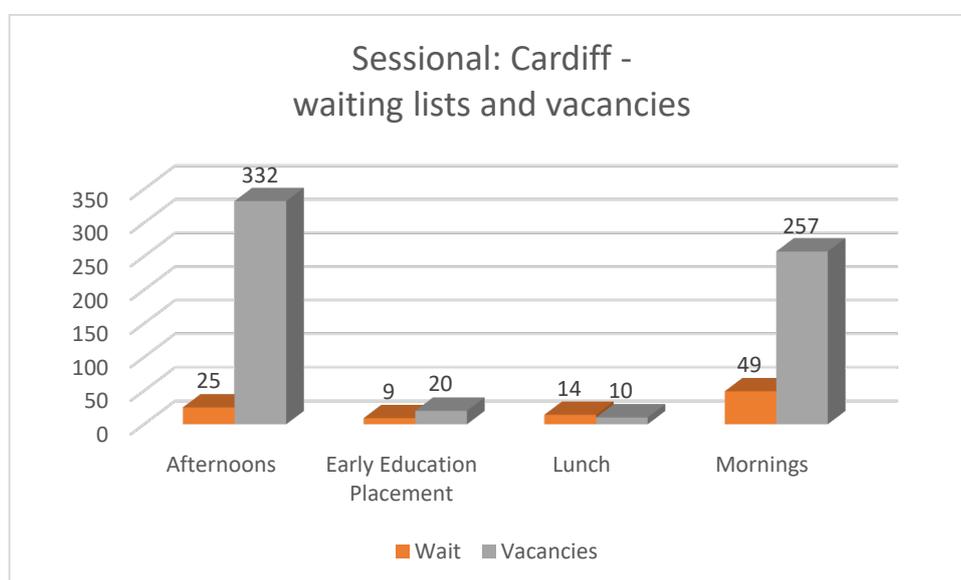
- The majority of children using sessional day care (989 of the 1336 reported by age) are aged 2 or 3 years.
- The majority of children (902 of the 1184 children reported by attendance type) attend on a part time basis.

Sessional daycare: Cardiff – waiting lists and vacancies

Table: Sessional daycare: Cardiff – waiting lists and vacancies

Sessional Care	Wait	Vacancies
Afternoons	25	332
Early Education Placement	9	20
Lunch	14	10
Mornings	49	257
Total	97	619

Chart: Sessional daycare: Cardiff – waiting lists and vacancies



- Overall there are more vacancies across sessional day care (619) than there are children on waiting lists (97) for all services except for lunch, where data indicates there are 14 children on an immediate waiting list and only 10 vacancies, a net shortfall of 4 places.
- However, there are some services in some NPAs showing a greater number of children waiting for an immediate place than there are vacancies (Mornings and Lunch sessions in Cardiff North; Lunch in Cardiff East; and Early Education Placements in Cardiff South West), as shown in the table below.

Table: Children on waiting list exceed vacant places, by NPA and service.

NPA	Service	Children on waiting list for an immediate place	Vacancies	Shortfall
Cardiff North	Mornings	40	19	21
		10	4	6
Cardiff East	Lunch	4	0	4
Cardiff South West	Early Education	7	0	7
Totals		61	23	38

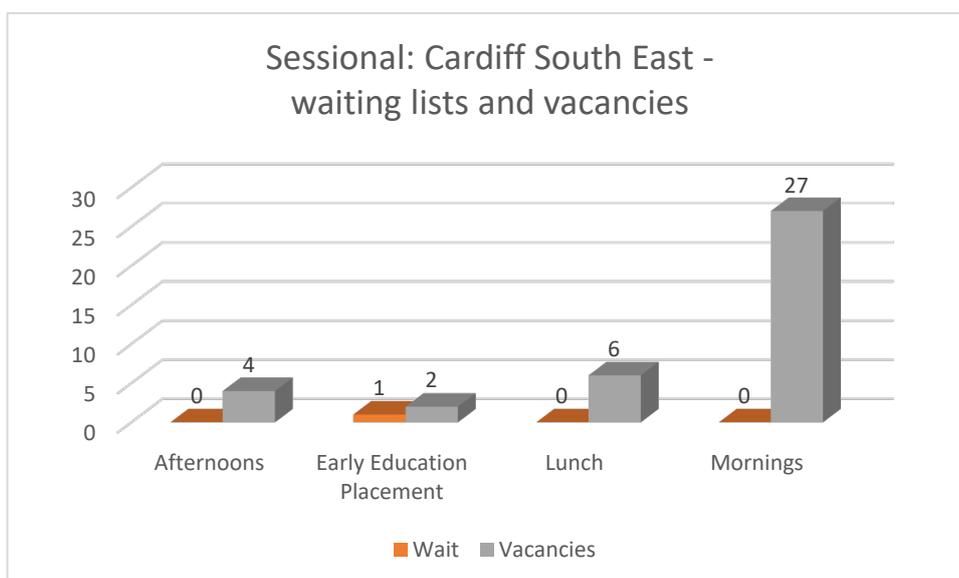
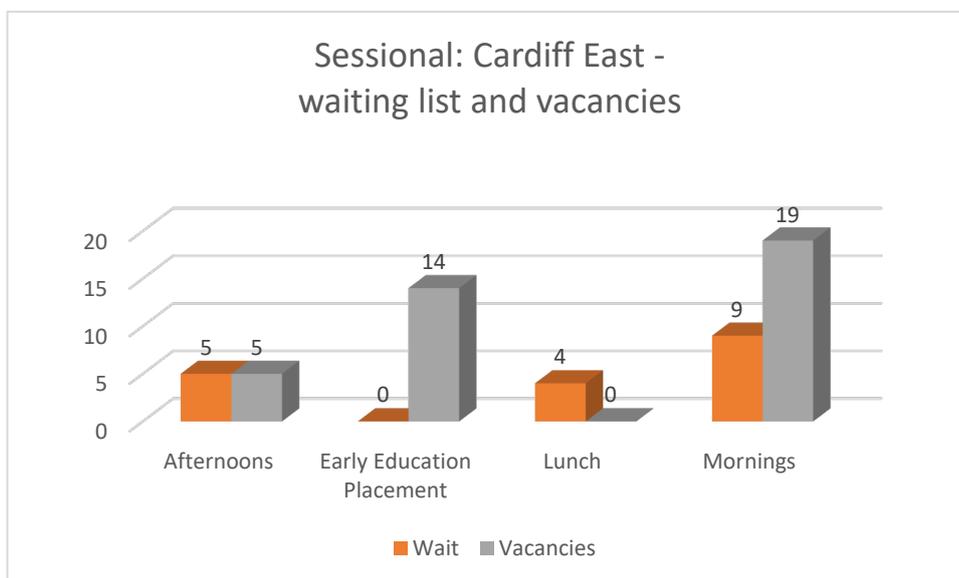
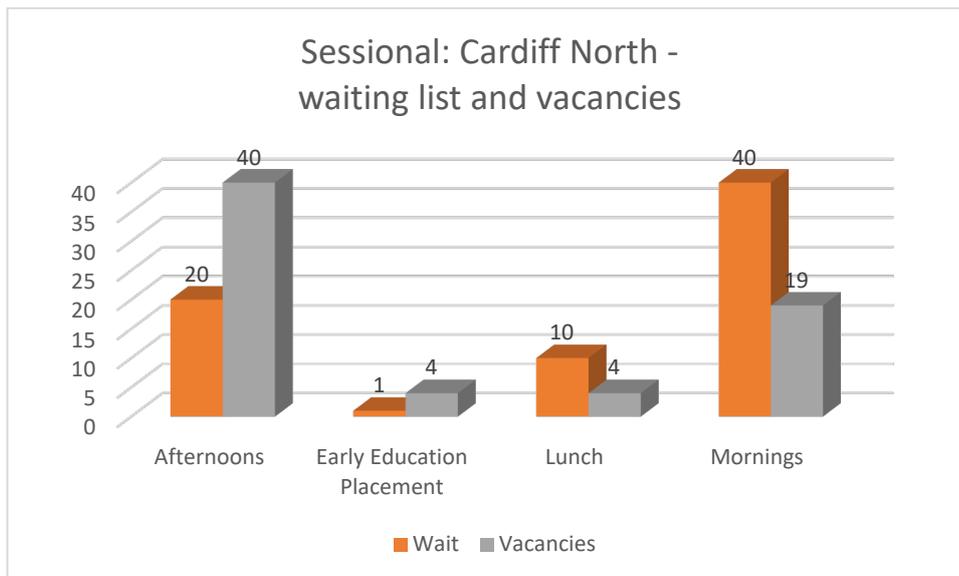
- It is not clear whether the shortfall figure is accurate.
- Respondents may not have followed guidance to only include children waiting for an immediate place (demand above capacity) as opposed to children waiting for a place that is age related.
- Education have confirmed that no children are awaiting an immediate early education placement
- Children may be attending a setting whilst on the waiting list for an immediate place at another setting or settings. Therefore, the number of children waiting for an immediate place may not indicate demand above capacity but reflect parental preference.
- Further data in relation to Welsh Language provision is included in chapter 10, Welsh medium and WESP

Action: Investigate potential demand for Mornings and Lunch provision in Cardiff North.

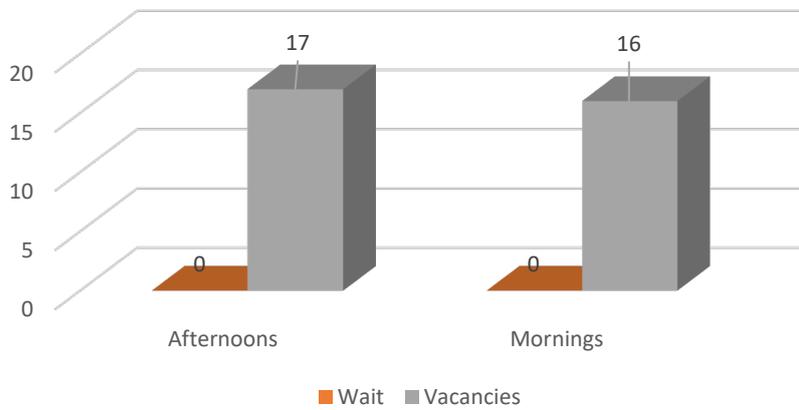
Table: sessional day care; by NPA – waiting lists and services

Sessional Care	Cardiff North		Cardiff East		Cardiff South East		City & Cardiff South		Cardiff South West		Cardiff West	
	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies
Afternoons	20	40	5	5	0	4	0	17	0	28	0	238
Early Education Placement	1	4	0	14	1	2	0	0	7	0	0	0
Lunch	10	4	4	0	0	6	0	0	0	0	0	0
Mornings	40	19	9	19	0	27	0	16	0	25	0	151

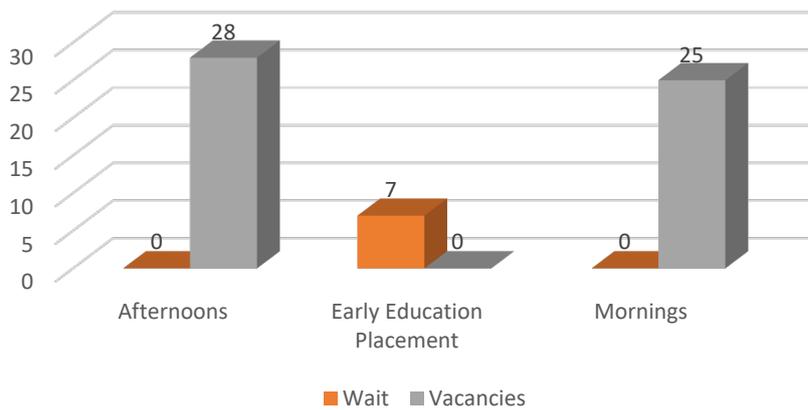
Charts: Sessional day care – waiting lists and vacancies by NPA



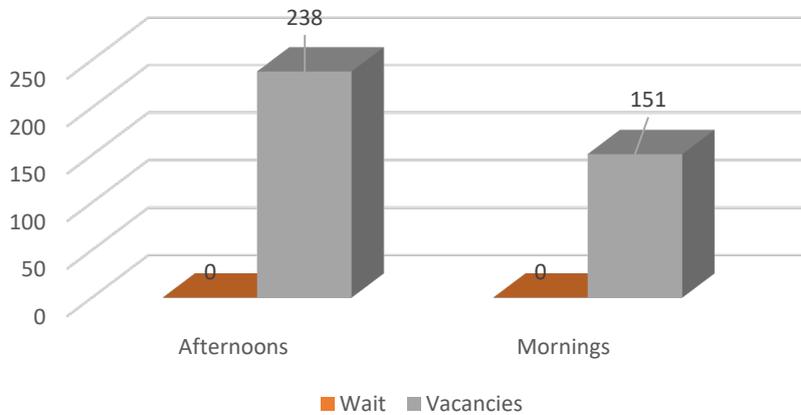
Sessional: City & Cardiff South - waiting lists and vacancies



Sessional: Cardiff South West - waiting lists and vacancies



Sessional: Cardiff West - waiting lists and vacancies

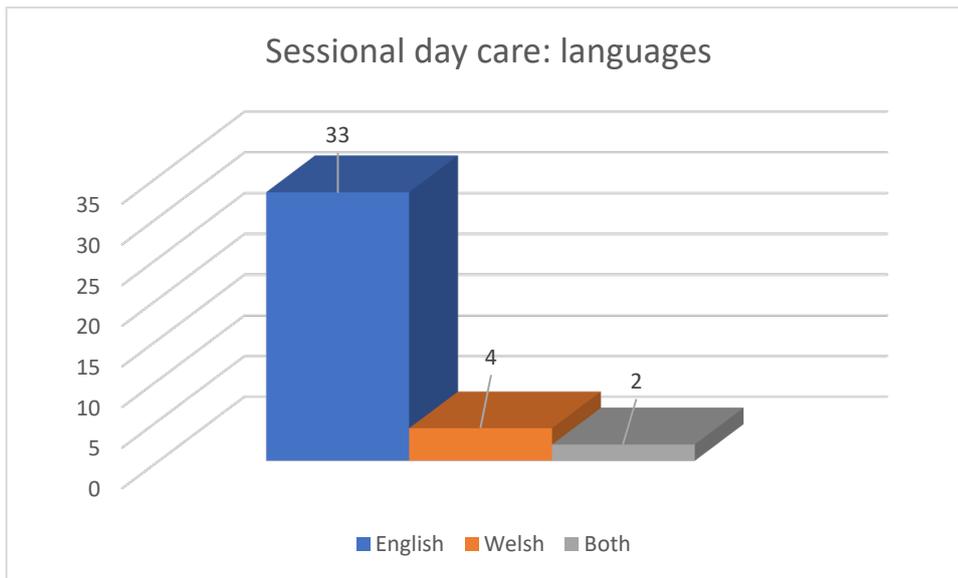


Sessional day care: languages

Table: Sessional day care: languages

English	33
Welsh	4
Both	2

Chart: Sessional day care: languages

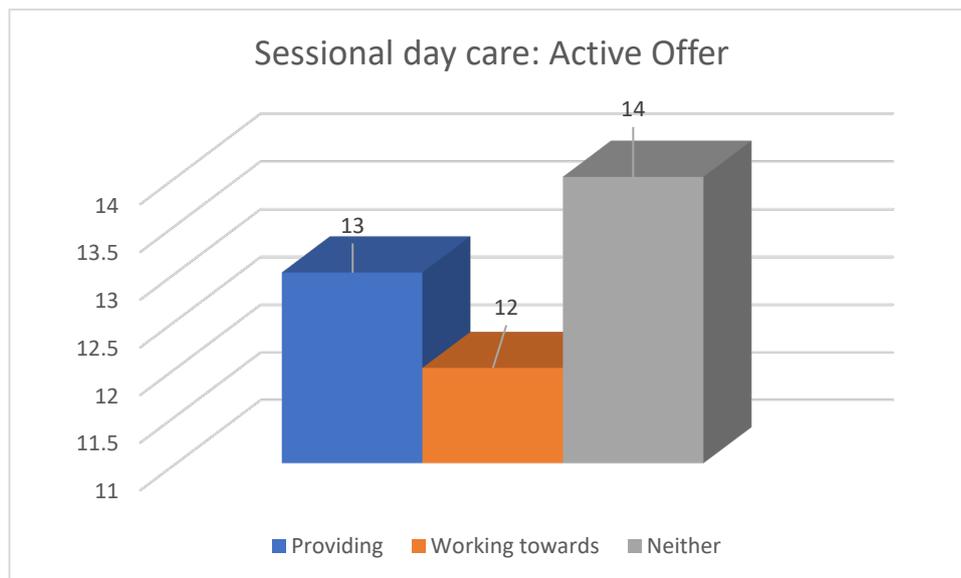


Sessional day care: Active Offer

Table: Sessional day care: Active Offer

Providing	13
Working towards	12
Neither	14

Chart: Sessional day care: Active Offer



Sessional daycare: other languages

Table: Sessional daycare: other languages

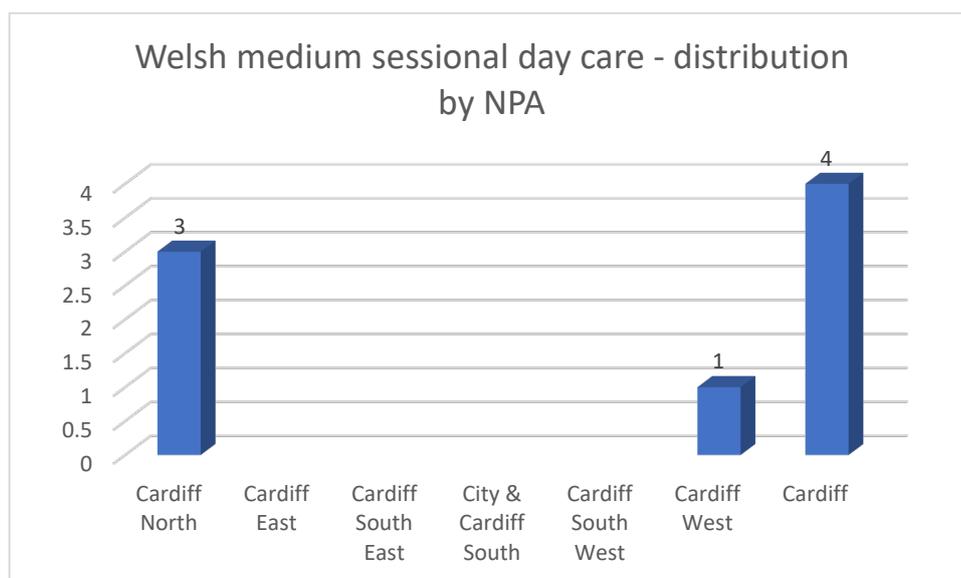
Welsh	13
English	1
Polish / Welsh	2
Greek / Italian / Urdu / Welsh	1
Chinese / Welsh	1

Sessional day care: Welsh language – distribution by NPA

Table: Sessional day care: Welsh language – distribution by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Sessional	3					1	4

Chart: Sessional day care: Welsh language – distribution by NPA



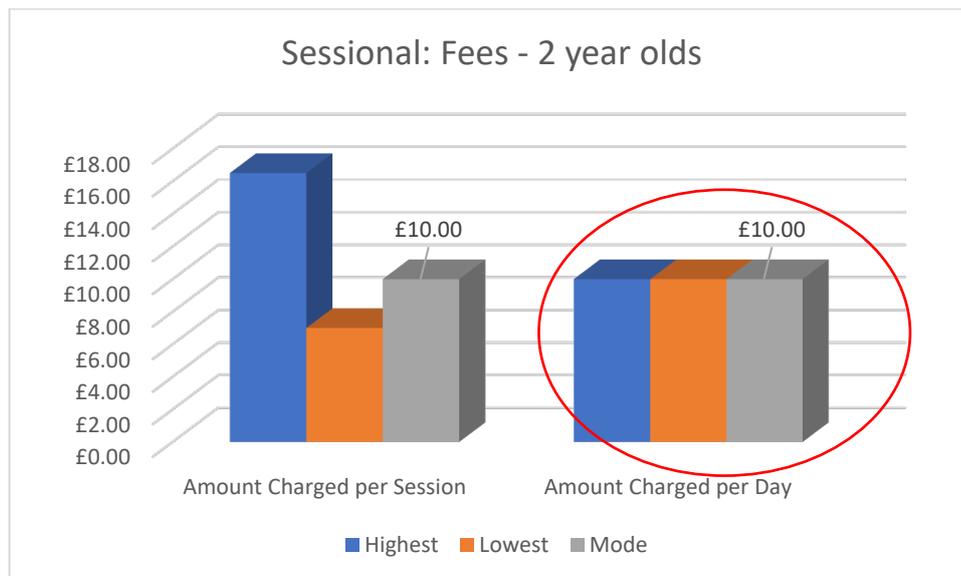
- There are a total of 4 Welsh medium sessional day care providers, with 3 in Cardiff North and one in Cardiff West.
- 13 providers deliver the Active Offer, and 12 are working towards deliver of the Active Offer.

Sessional day care – fees by age

Table: Sessional day care – fees; 2 year olds

2 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	-	£16.50	£10.00	-	-
Lowest	-	£7.00	£10.00	-	-
Mode	-	£10.00	£10.00	-	-

Chart: Sessional day care – fees; 2 year olds

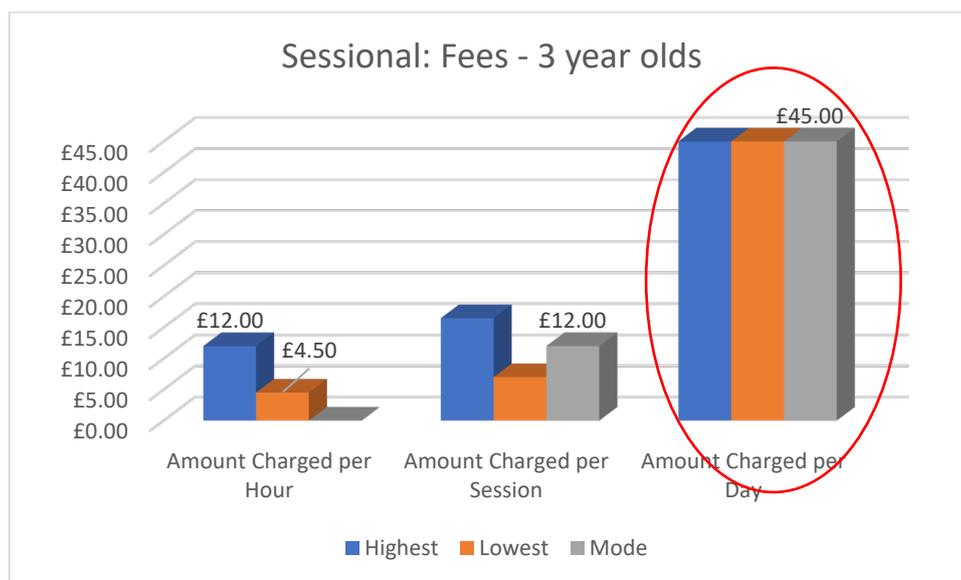


- It is unclear if respondents have used the terms 'session' and 'day' interchangeably

Table: Sessional day care – fees; 3 year olds

3 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day
Highest	£12.00	£16.50	£45.00
Lowest	£4.50	£7.00	£45.00
Mode	N/A	£12.00	£45.00

Chart: Sessional day care – fees; 3 year olds



- It is not clear what the day rate refers to, as sessional providers do not provide full day care. It is possible that respondents have used the terms 'session' and 'day' interchangeably

Table: Sessional day care – fees; 4 year olds

4 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	£9.00	£16.50	£45.00	-	-
Lowest	£4.50	£7.00	£45.00	-	-
Mode	N/A	£12.00	£45.00	-	-

Chart: Sessional day care – fees; 4 year olds

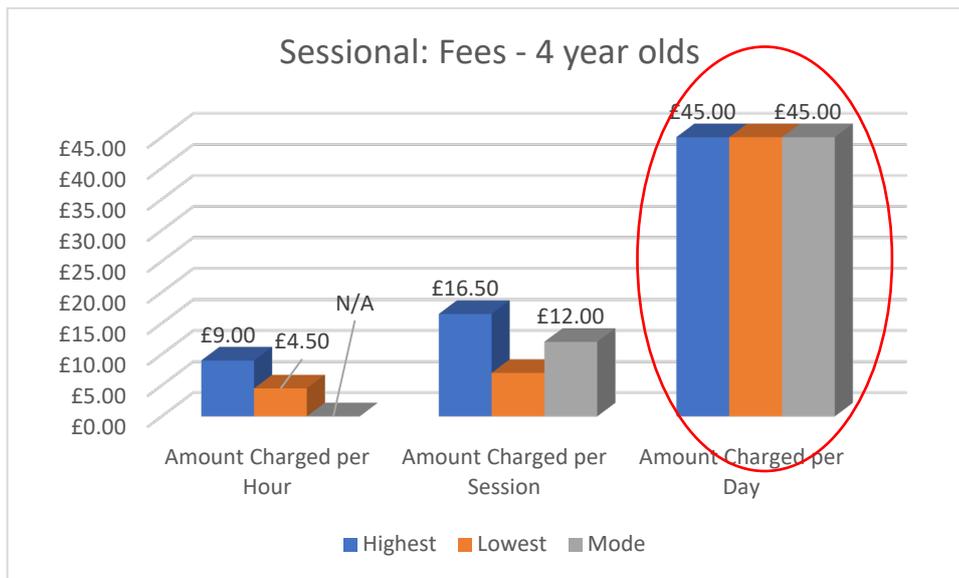
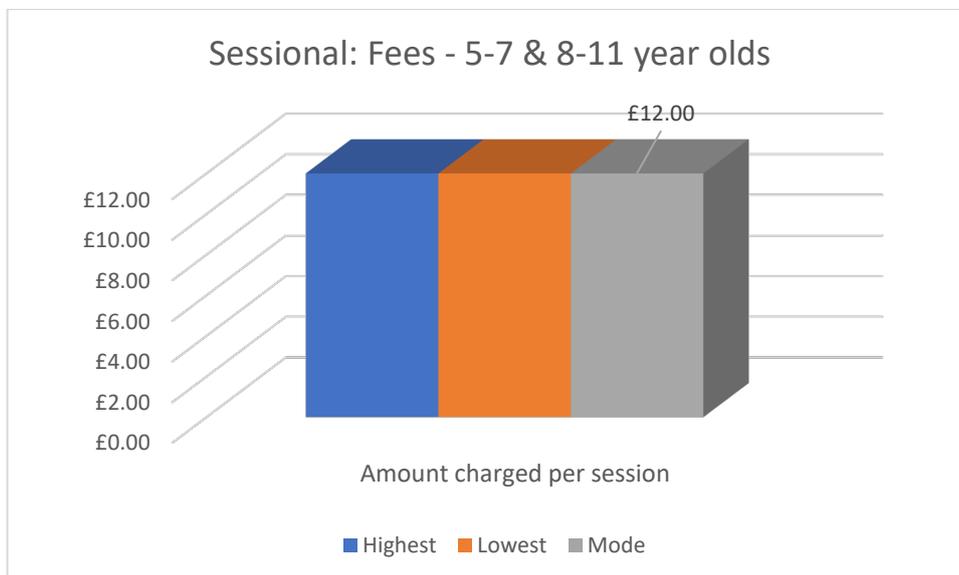


Table: Sessional day care – fees; 5-7 & 8-11 year olds

	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
4 year olds					
Highest	-	£12.00	-	-	-
Lowest	-	£12.00	-	-	-
Mode	-	£12.00	-	-	-

Chart: Sessional day care – fees; 5-7 & 8-11 year olds



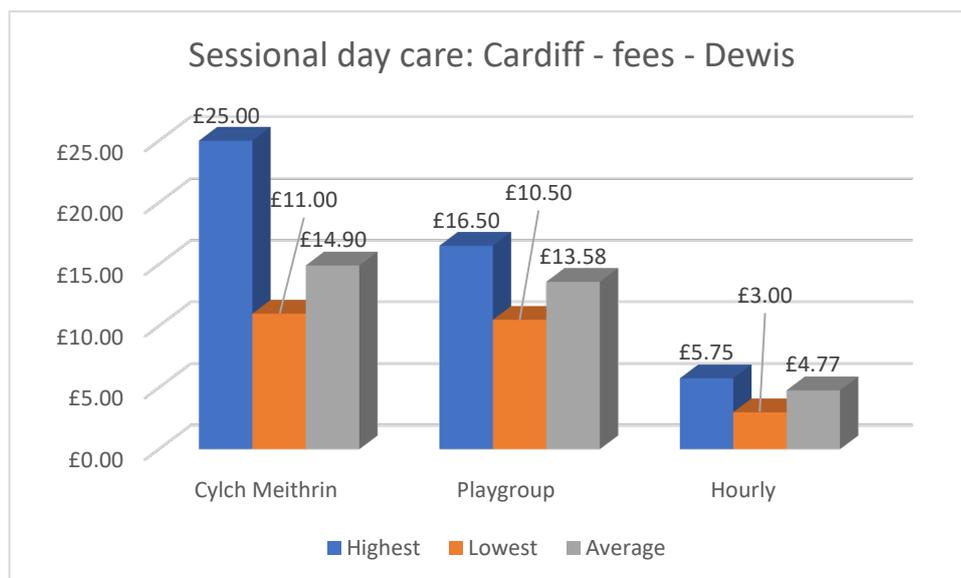
NB: Although responses indicated children aged 12 - 14 and 15-17 were on sessional day care providers' books, no fees information was submitted

Sessional daycare: Cardiff - fees as per Dewis records

Table: Sessional daycare: Cardiff - fees as per Dewis records

Sessional	Highest	Lowest	Average
Cylch Meithrin	£25.00	£11.00	£14.90
Playgroup	£16.50	£10.50	£13.58
Hourly	£5.75	£3.00	£4.77

Chart: Sessional daycare: Cardiff - fees as per Dewis records



- The modal sessional fees for 3 and 4 year olds reported via SASS (£12.00) was lower than the average reported via Dewis for both playgroups (£13.58) and Cylchoedd Meithrin (14.90)

Sessional care: Opening times and atypical hours

Table: Sessional care: Opening times and atypical hours

	Earliest opening time	Latest opening time	Earliest closing time	Latest closing time	Number of settings open before 8 am	Number of settings open after 6 pm
Monday	7.45	11.30	11.30	15.45	1	0
Tuesday	7.45	11.30	11.30	15.45	1	0
Wednesday	7.45	11.30	11.30	16.00	1	0
Thursday	7.45	11.30	11.30	15.45	1	0
Friday	7.45	11.30	11.30	16.00	1	0
Saturday	9.15	9.15	12.15	12.15	0	0
Sunday	9.15	9.15	12.15	12.15	0	0

Chart: Sessional care: Opening times and atypical hours

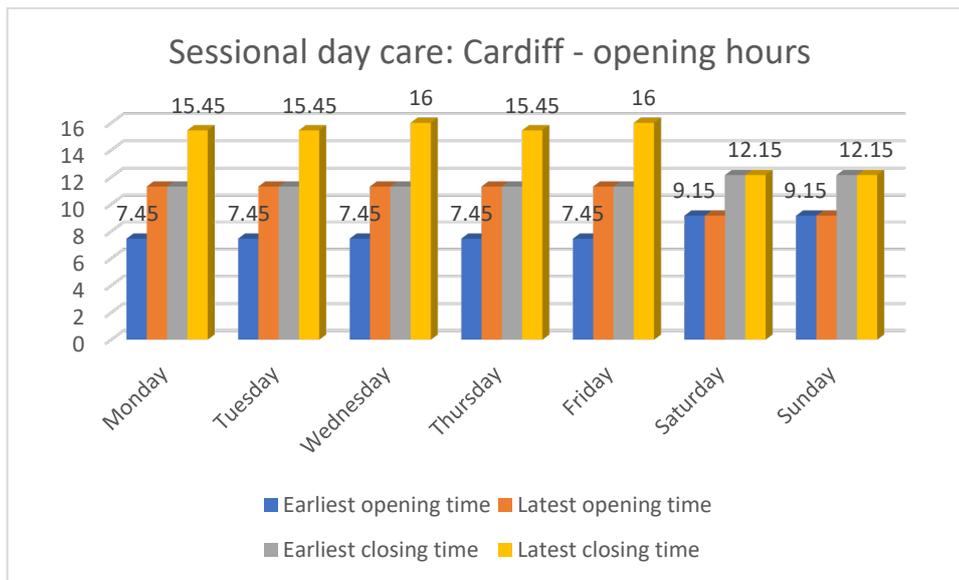
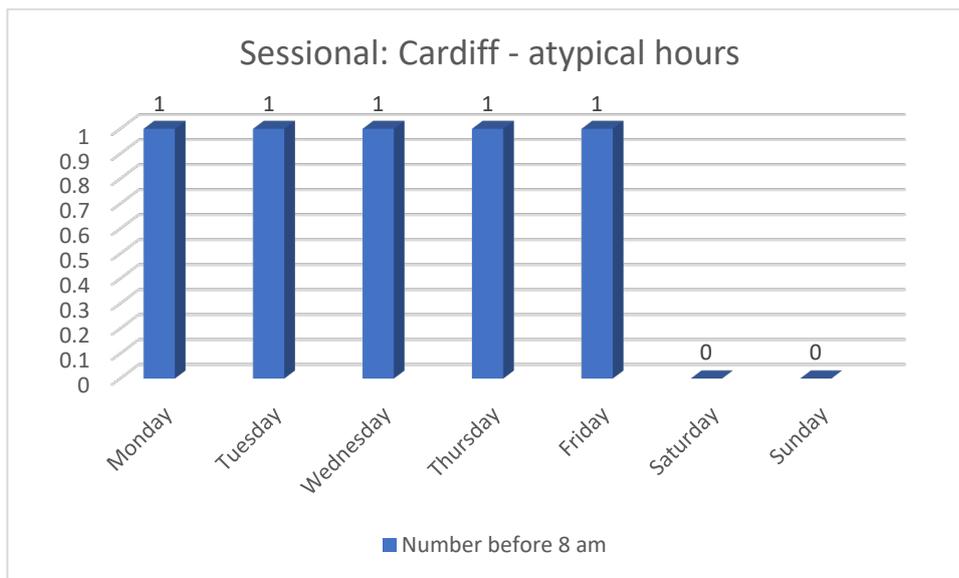


Chart: Sessional day care – settings opening atypical hours



- By the nature of their provision, it was not expected that large numbers of sessional day care settings would provide for atypical hours. One setting in Cardiff West opens before 8.00 am.

Holidays

Table: Sessional day care: Holiday operation – holidays open

	Yes	No	Don't know
Summer	2	1	0
October half term	1	1	0
Christmas	0	2	0
Feb half term	1	1	0
Easter	1	1	0
May half term	1	1	0

Chart: Sessional day care: holiday operation – holidays open

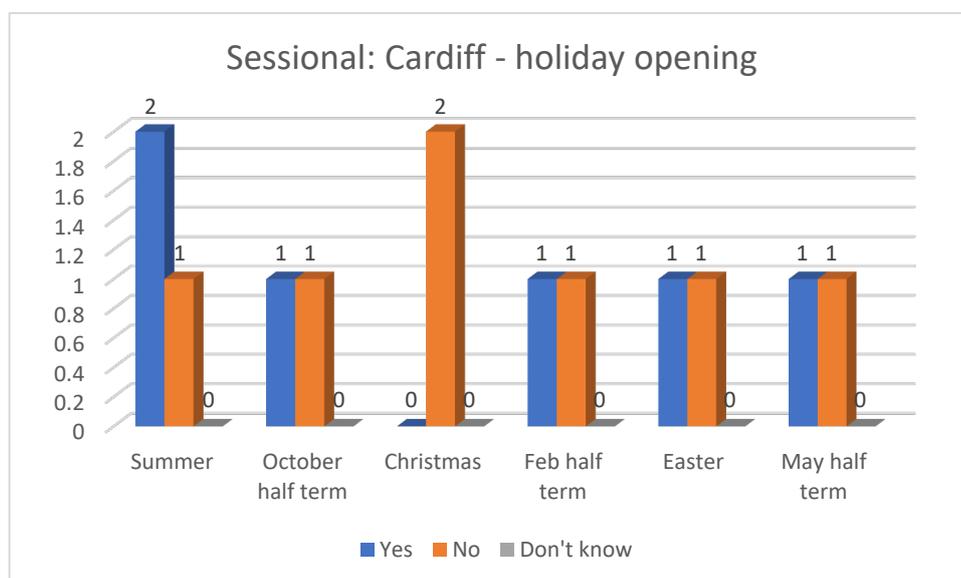
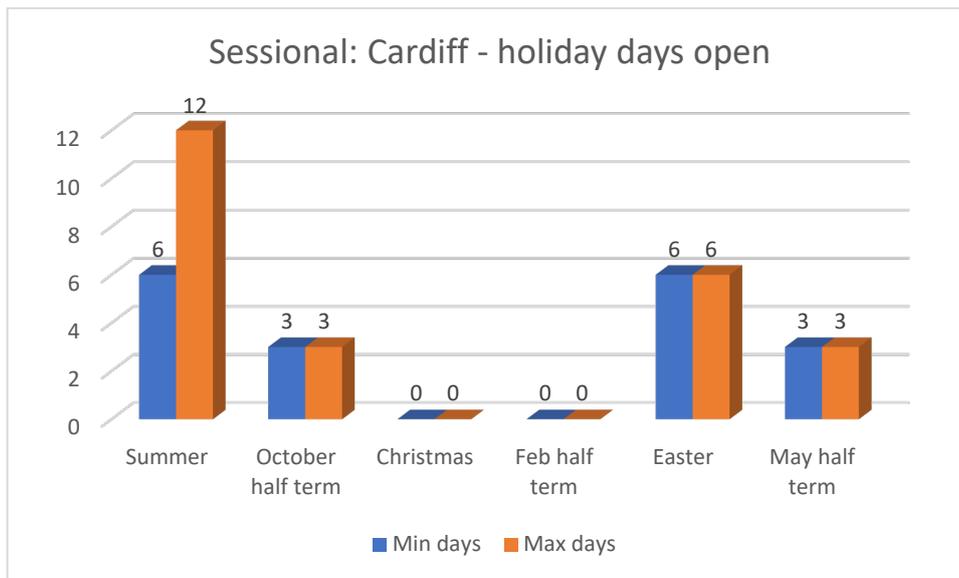


Table: Sessional day care: holidays – holiday days open

	Minimum days open days	Maximum days open days
Summer	6	12
October half term	3	3
Christmas	0	0
Feb half term	0	0
Easter	6	6
May half term	3	3

Chart: Sessional day care: holidays – holiday days open

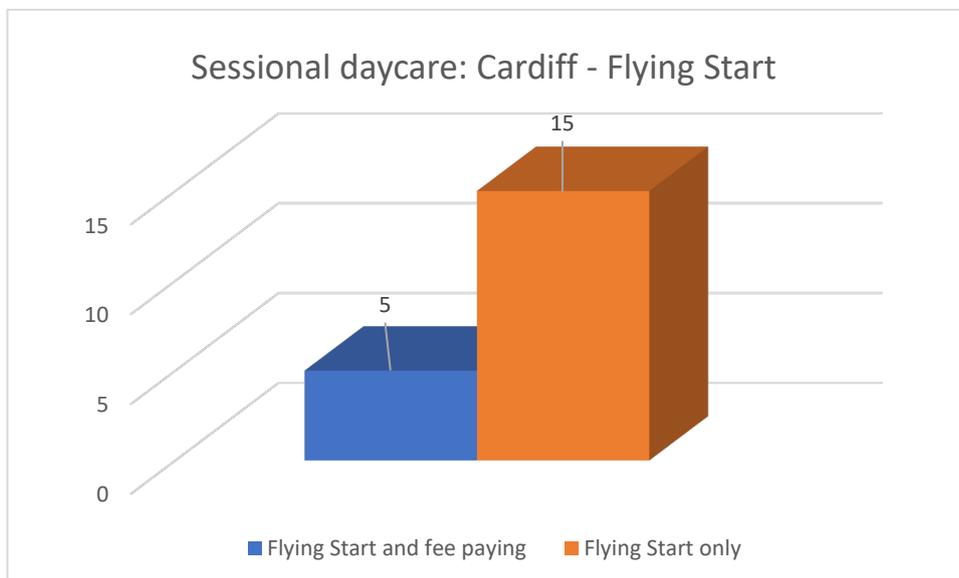


Sessional day care – Flying Start

Table: Sessional day care – Flying Start

Flying Start and fee paying	5
Flying Start only	15

Chart: Sessional day care – Flying Start

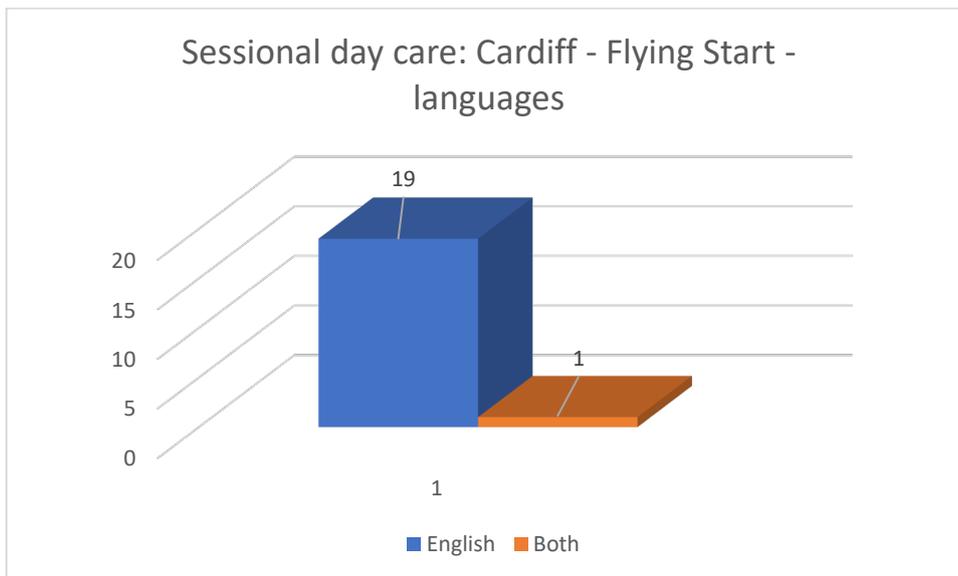


Sessional day care: Flying Start - languages

Table: Sessional day care – Flying Start - languages

English	19
Both	1

Chart: Sessional day care – Flying Start - languages

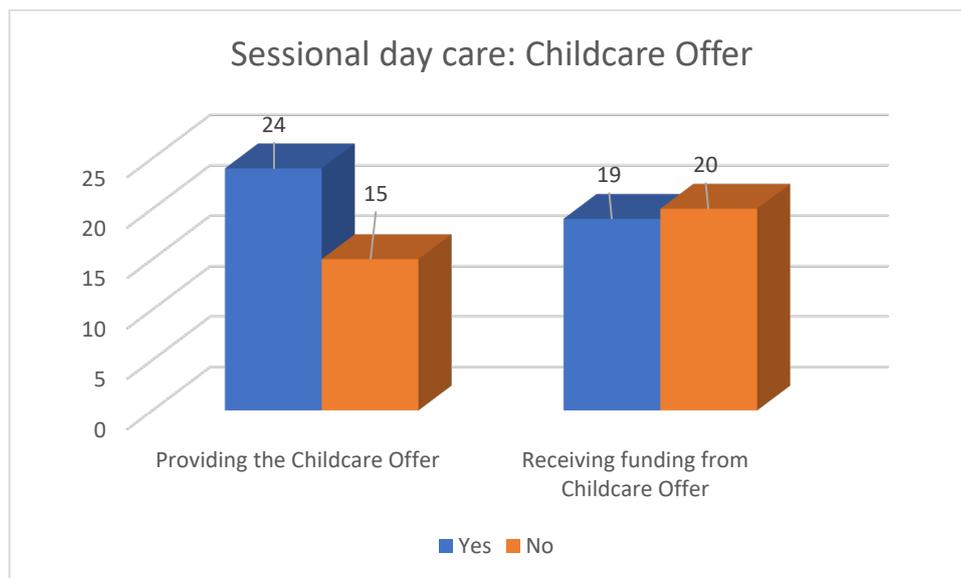


Sessional day care: Childcare Offer

Table: Sessional day care: Childcare Offer

	Yes	No
Providing the Childcare Offer	24	15
Receiving funding from Childcare Offer	19	20

Chart: Sessional day care: Childcare Offer

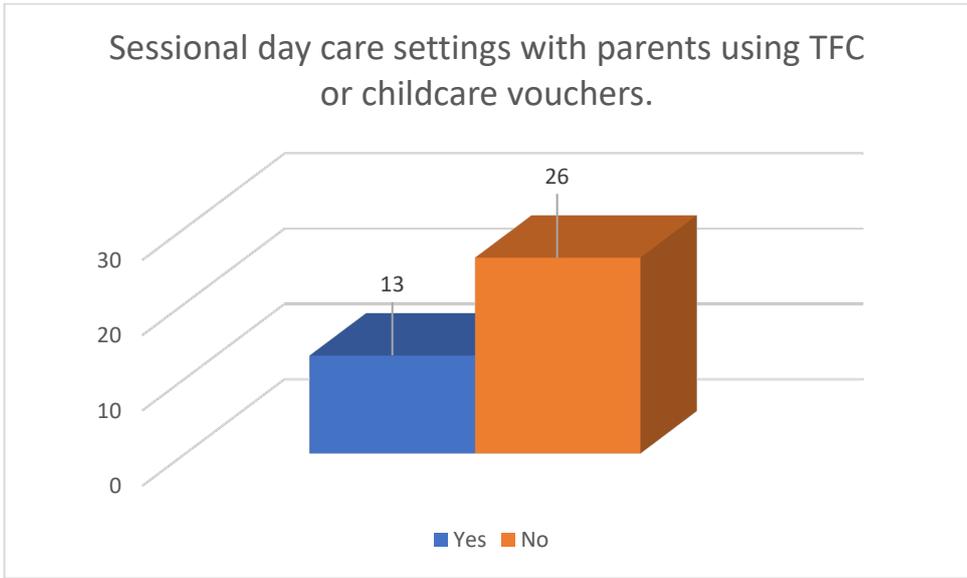


Sessional day care: Tax Free Childcare or childcare vouchers

Table: Sessional daycare settings with parents using Tax Free Childcare or childcare vouchers.

Sessional day care settings with parents using Tax Free Childcare or childcare vouchers	
Yes	13
No	26

Chart: Sessional day care settings with parents using Tax Free Childcare or childcare vouchers.



- Encourage more setting, initially targeting sessional day care, to sign up to provide Tax Free Childcare and/or accept Childcare Vouchers. Only 13 (33.3%) of sessional day care providers are currently signed up, the lowest proportion of any provider type.

Sessional day care: Early Education

Table: Number of settings self-reporting being funded to provide 'early years part time education' vs. self-reporting children funded for Early Education Placements vs. funded by Education (Education department data)

Self-reporting being funded to provide 'early years part time education'/Early Education Placements	4
Self-reporting children funded for Early Education Placements	11
Registered with the Education department to provide Early Education Placements	4
Funded by Education (Education department data)	4

Strengths and weaknesses

- There are 9 sessional day care providers in Cardiff North, 8 in Cardiff South West and Cardiff West. There are over 200 sessional day care places provided in each of these NPAs, with over 100 in Cardiff East (7 settings, 173 places) and Cardiff South East (5 settings, 148 places).
- City and Cardiff South has the fewest settings and places (2 setting, 64 places)
- Overall there are more vacancies across sessional day care (619) than there are children on waiting lists (97) for all services except for lunch, where data indicates there are 14 children on an immediate waiting list and only 10 vacancies, a net shortfall of 4 places.
- However, there are some services in some NPAs showing a greater number of children waiting for an immediate place than there are vacancies (Mornings and Lunch sessions in Cardiff North; Lunch in Cardiff East; and Early Education Placements in Cardiff South West. However, Education have noted that this last data is incorrect, and there are no children waiting for an immediate Early Education place)

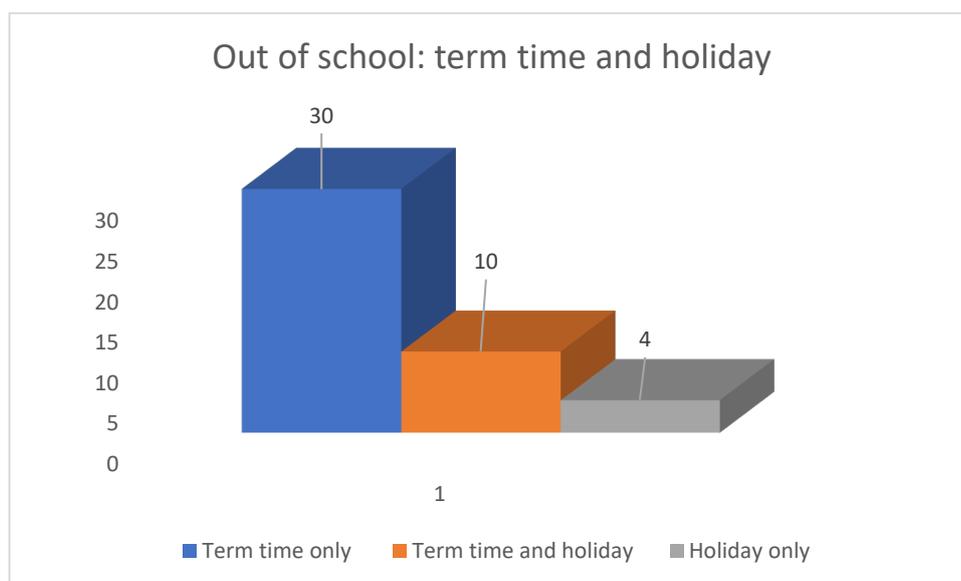
7.4. Out of school

The following data tables and charts are based on data collected via SASS

Table: Out of school headline data

Number of Registered Settings	44	Term time only	30
		Term time and holiday	10
		Holiday only	4
Number of Registered Places	2272		
Number of children on books by age	2757		
Number of children by attendance	2590	Full time	176
		Part time	1862
		Ad hoc	552
Main Language of setting			
English/Both	37(2)		
Welsh	5	Provide Active Offer	5
		Working towards Active Offer	4
Flying Start provision			
Flying Start and fee paying	1		
Flying Start only	0		
Number Providing Childcare Offer (Number Funded via Childcare Offer)	19 (10)		
Number Offering Tax Free Childcare or Vouchers	39		

Chart: Out of school: term time and holidays



- The majority of out of school operates term time only (30)

Table: Out of school settings by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Total	16	1	5	2	6	14	44

Chart: Out of school settings by NPA

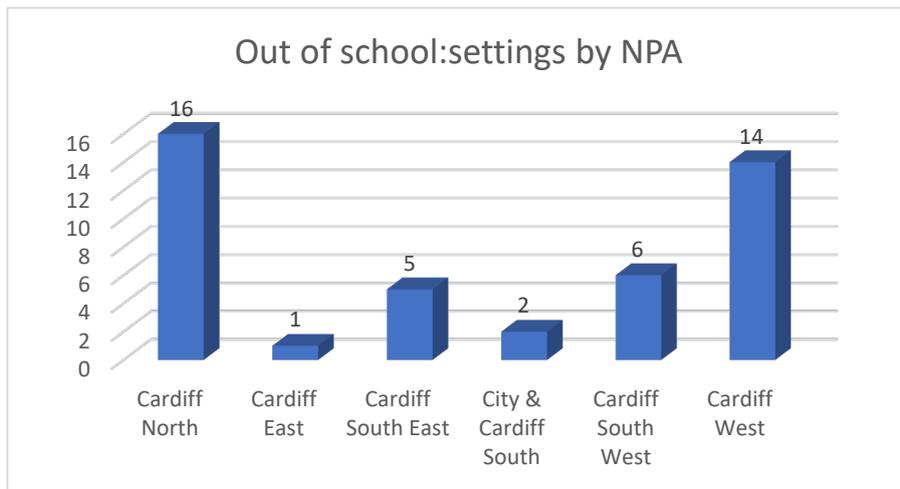
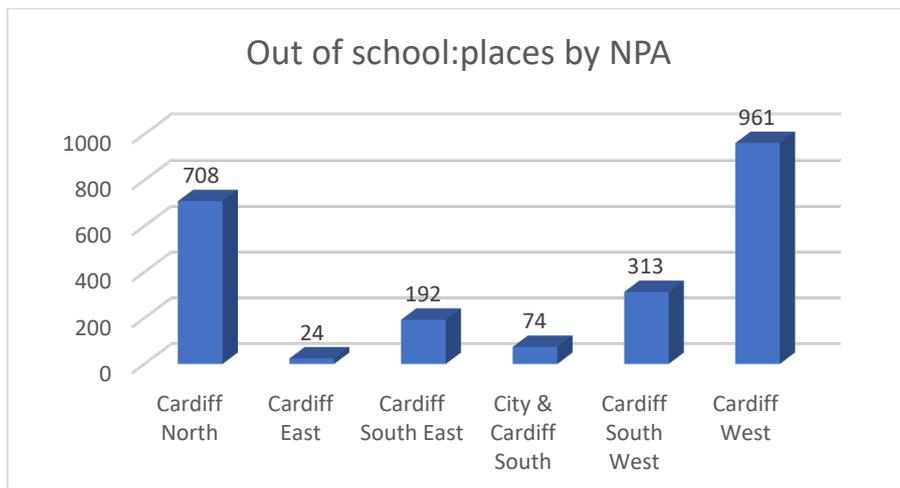


Table: Out of school places by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Total	708	24	192	74	313	961	2272

Chart: Out of school places by NPA



- There are 14 out of school providers in Cardiff North, providing 708 places, and 14 in Cardiff West, providing 961 places.
- However, there is only one in Cardiff East (24 places) and 2 in City and Cardiff South (74 places)

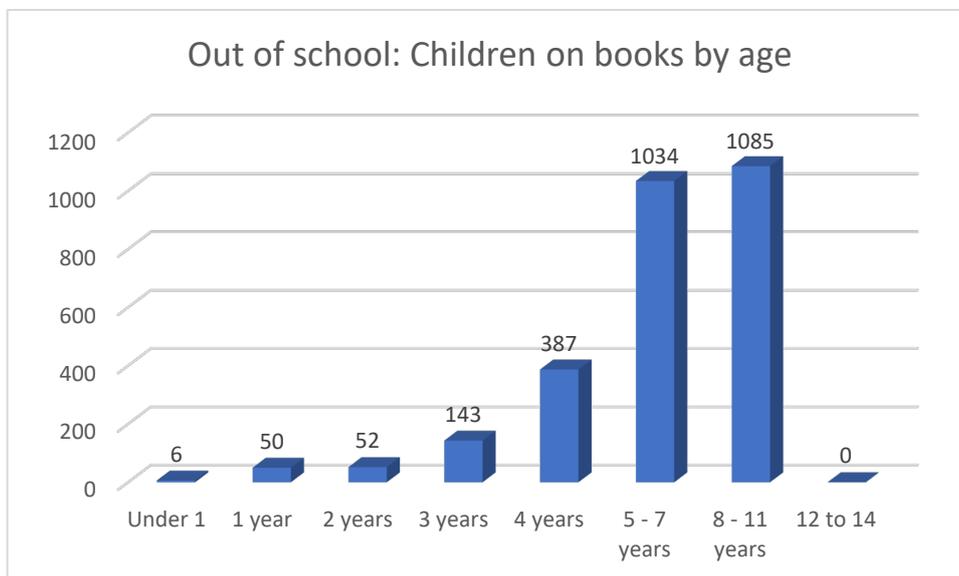
Action: Identify whether any unmet demand exists for out of school provision in Cardiff East and City and Cardiff South

Out of school: children on the books by age

Table: Out of school: children on the books by age

Age	Number of children
Under 1	6
1 year	50
2 years	52
3 years	143
4 years	387
5 - 7 years	1034
8 - 11 years	1085
12 to 14	0

Chart: Out of school: children on the books by age

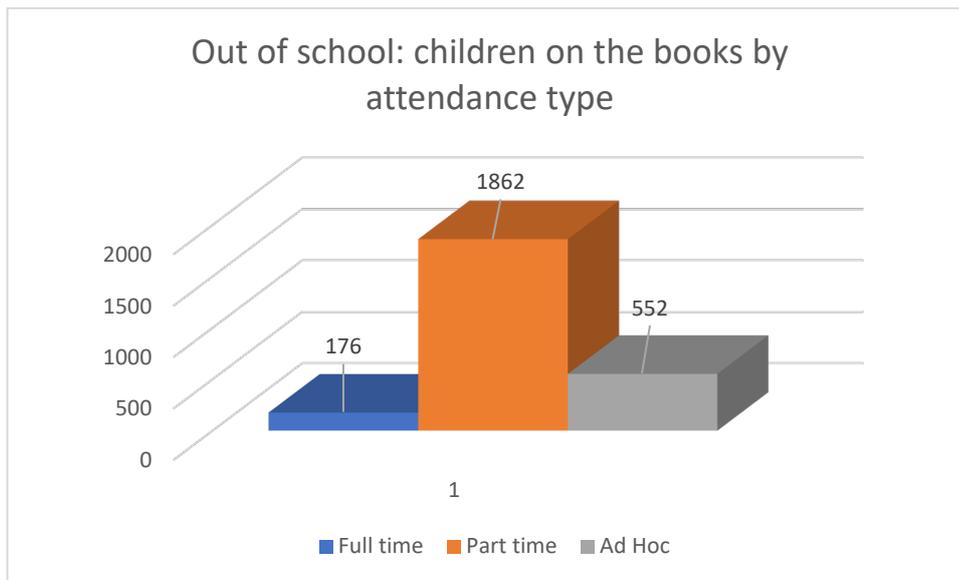


Out of school: children on the books by attendance type

Table: Out of school: children on the books by attendance type

Full time	176
Part time	1862
Ad Hoc	552

Chart: Out of school: children on the books by attendance type



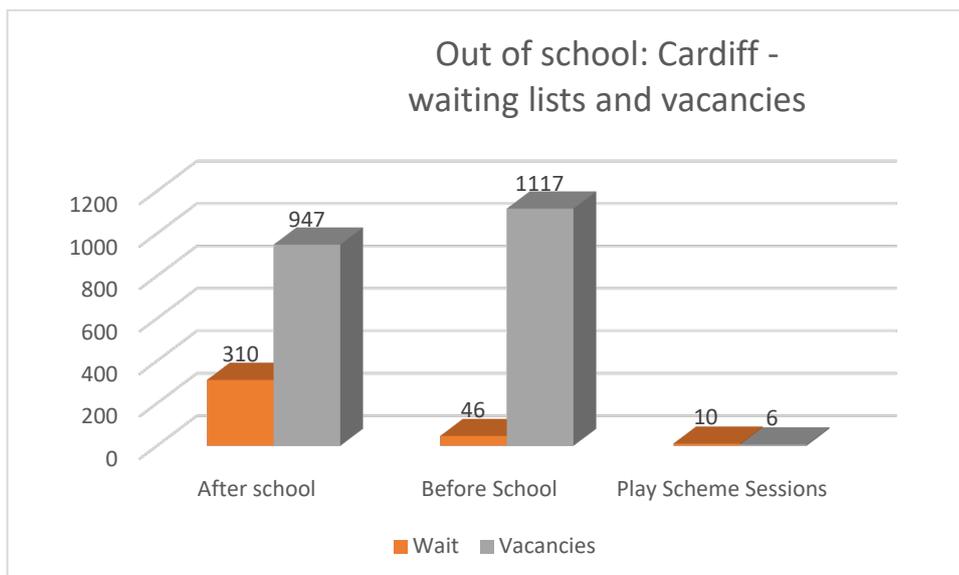
- The majority of the children attending out of school care (2119 of the 2757 children reported by age) are aged 5 – 11.
- The majority of children attend on a part time basis (1862 of the 2590 children reported by attendance type)

Out of school – waiting lists and vacancies

Table: Out of school: Cardiff – waiting lists and vacancies

Out of school	Wait	Vacancies
After school	310	947
Before School	46	1117
Play Scheme Sessions	10	6

Chart: Out of school: Cardiff – waiting lists and vacancies



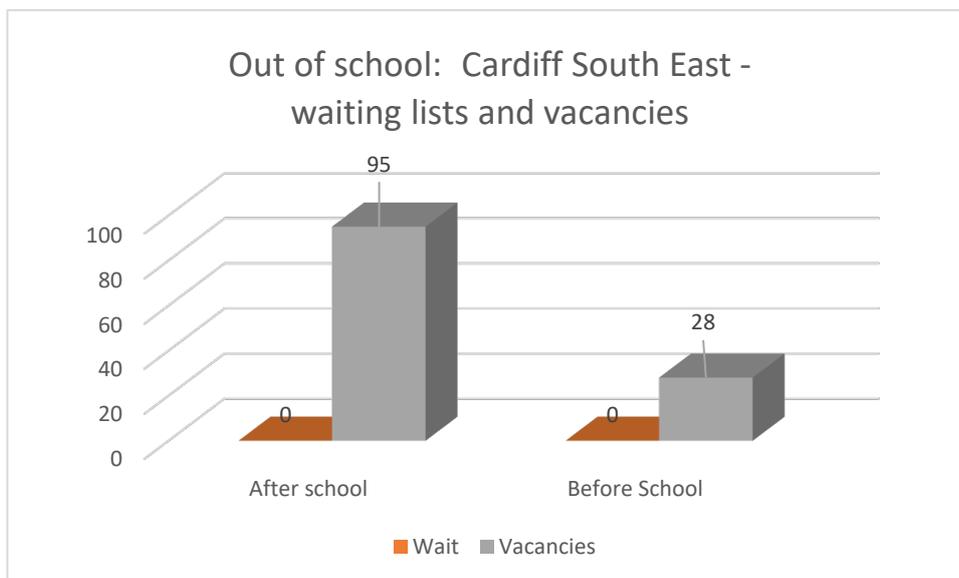
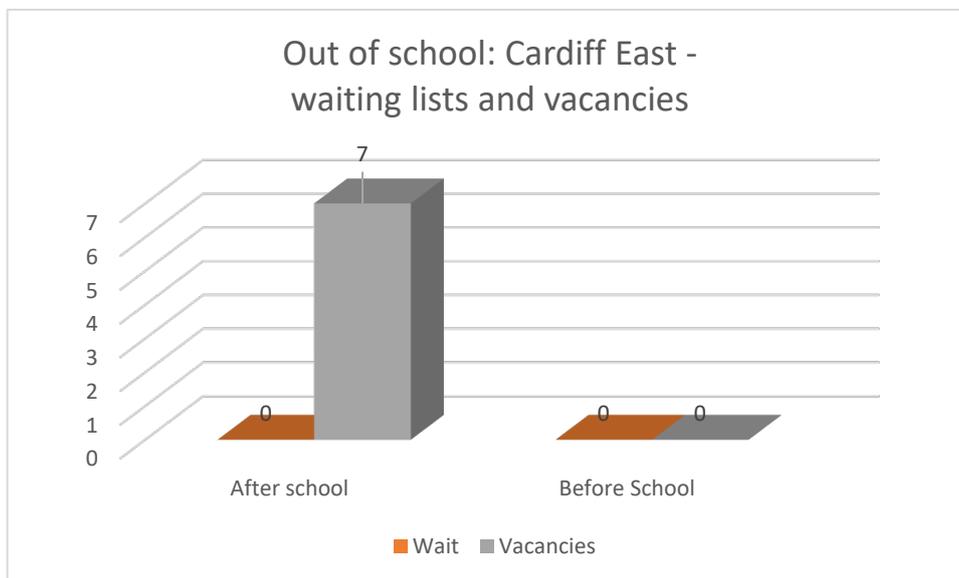
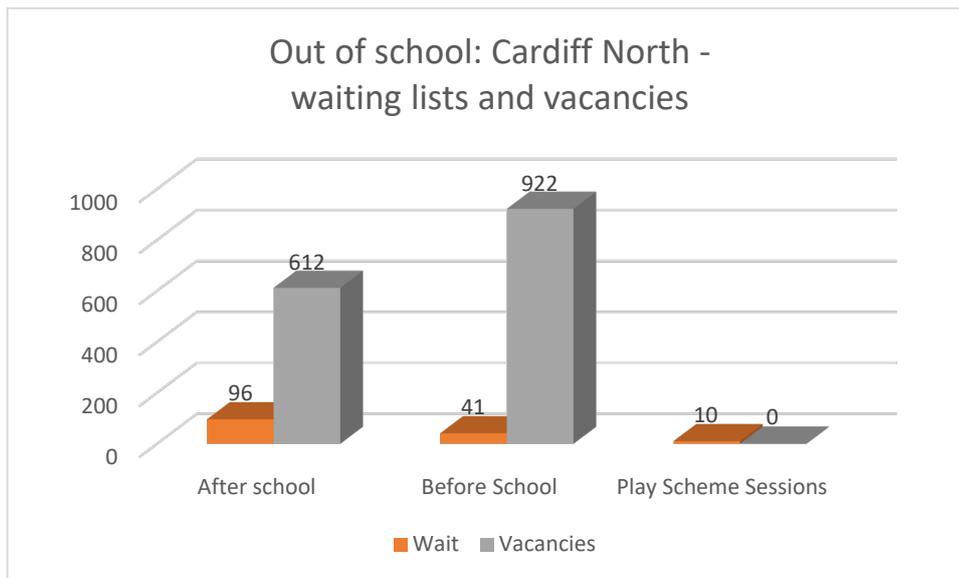
- Overall there are more vacancies across out of school care (2070) than there are children waiting for an immediate place (219) except for a shortfall of 4 places for playscheme sessions (10 children reported on waiting list; 6 vacancies)
- However, in Cardiff South West, the data appears to show a shortfall of 88 after school places (122 children waiting; 34 vacancies). NB: Please also see Welsh language section, as this provider is a Welsh medium setting

Action: Identify if evidence for unmet Welsh-medium out of school care demand exists in Cardiff South West.

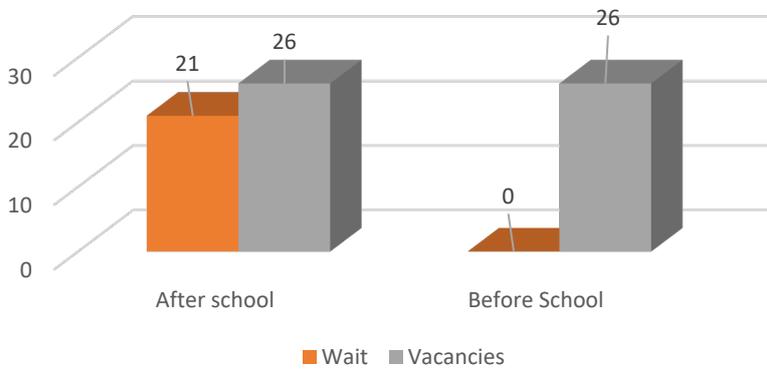
Table: Out of school – waiting lists and vacancies by NPA

	Cardiff North		Cardiff East		Cardiff South East		City & Cardiff South		Cardiff South West	
	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies	Wait	Vacancies
Out of School										
After school	96	612	0	7	0	95	21	26	122	34
Before School	41	922	0	0	0	28	0	26	0	0
Play Scheme Sessions	10	0	0	0	0	0	0	0	0	0

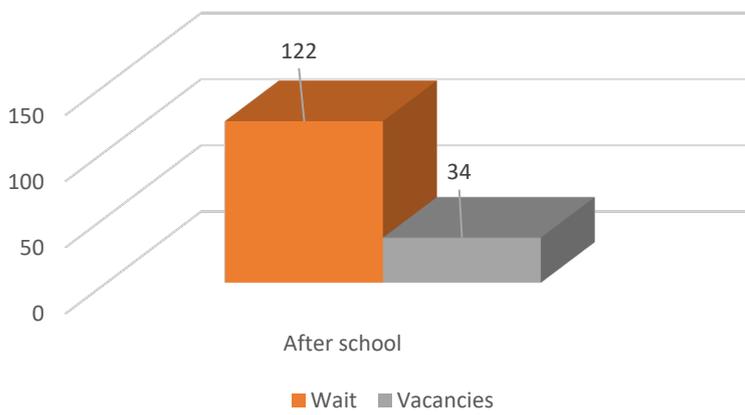
Charts: Out of school – waiting lists and vacancies by NPA



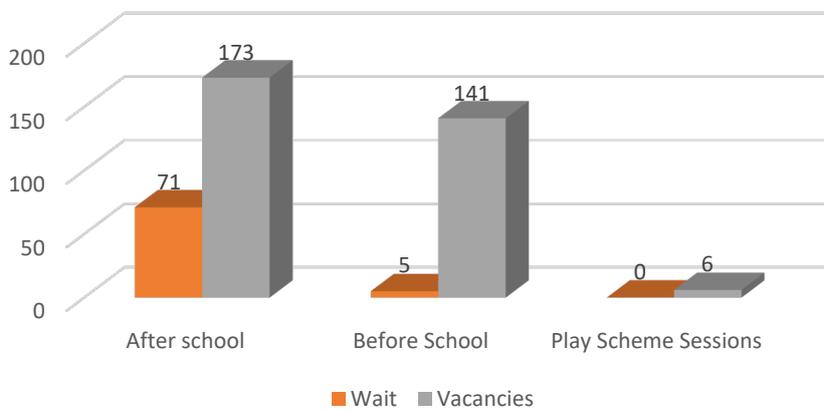
Out of school: City & Cardiff South - waiting lists and vacancies



Out of school: Cardiff South West - waiting lists and vacancies



Out of school: Cardiff West - waiting lists and vacancies

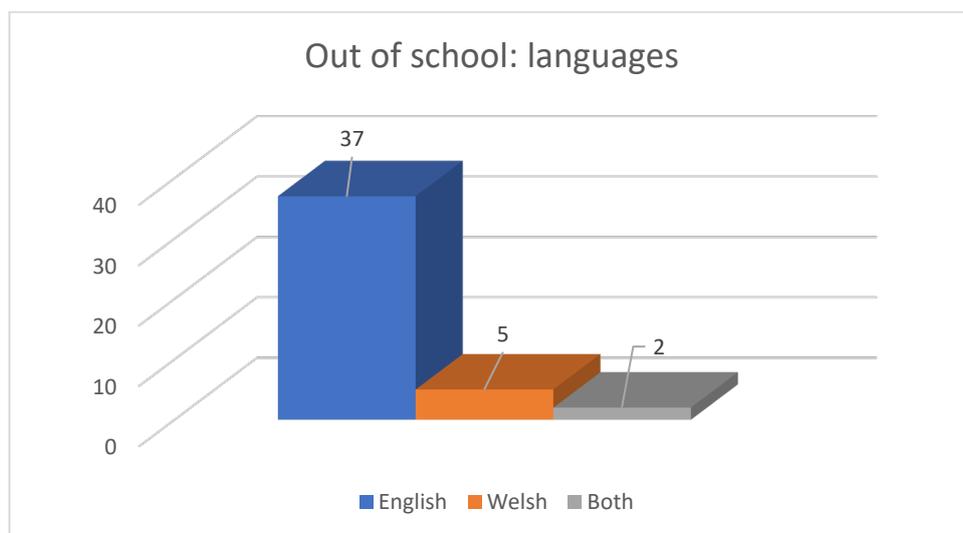


Out of school: languages

Table: Out of school: languages

English	37
Welsh	5
Both	2

Chart: Out of school: languages

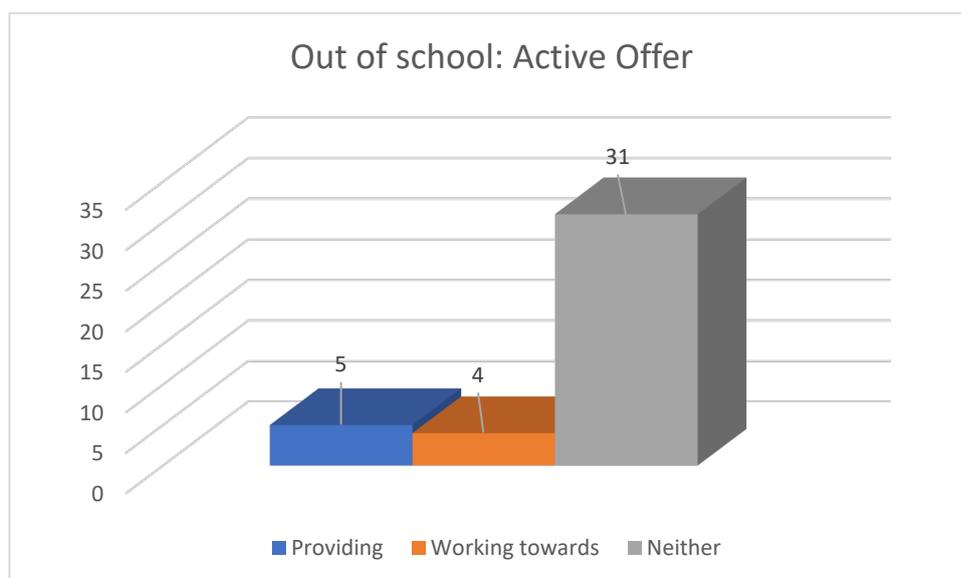


Out of school: Active Offer

Table: Out of school: Active Offer

Providing	5
Working towards	4
Neither	31

Chart: Out of school: Active Offer



Out of school: other languages

Table: Out of school: other languages

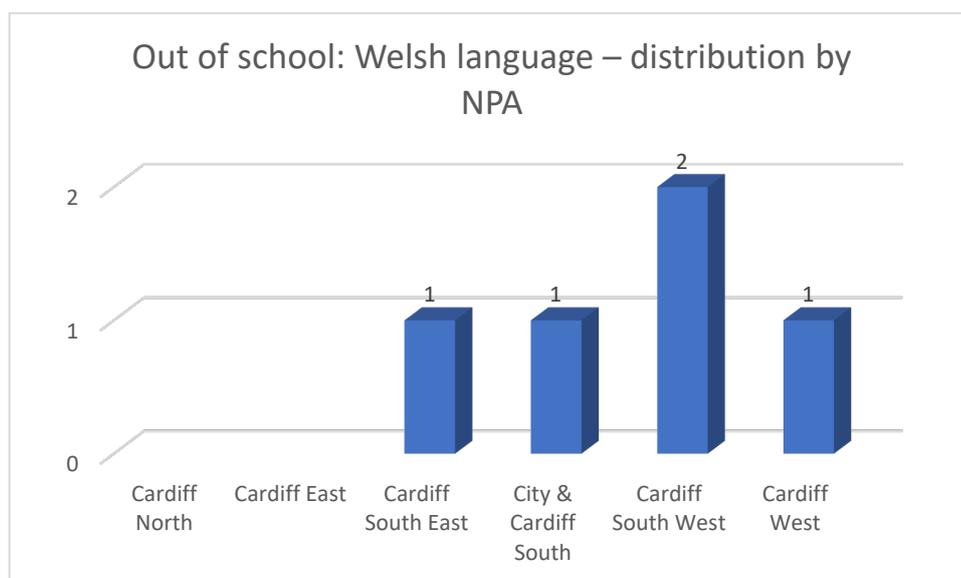
Welsh	9
English	2

Out of school: Welsh language – distribution by NPA

Table: Out of school: Welsh language – distribution by NPA

	Cardiff North	Cardiff East	Cardiff South East	City Cardiff South &	Cardiff South West	Cardiff West	Cardiff
Settings			1	1	2	1	5

Chart: Out of school: Welsh language – distribution by NPA



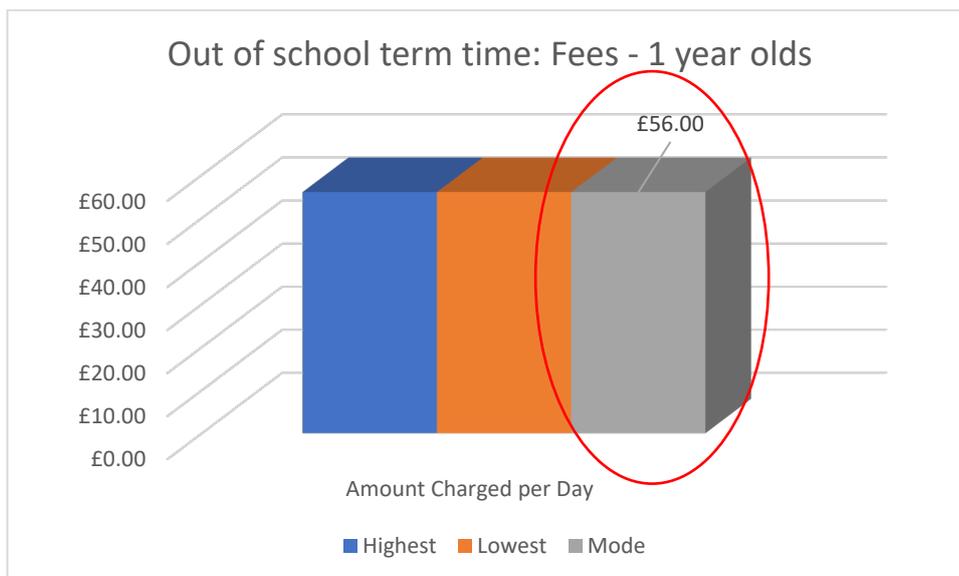
- There are two Welsh medium out of school providers in Cardiff South West, and one each in Cardiff South East, City & Cardiff South and Cardiff West.
- There is no Welsh medium out of school care settings in Cardiff North or Cardiff East
- 5 out of school settings provide the Active Offer, 4 are working towards the delivery of the Active Offer.

Out of school - fees by age: term time

Table: Out of school care – 1 year olds: term time

1 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest			£56.00		
Lowest			£56.00		
Mode			£56.00		

Chart: Out of school care – 1 year olds: term time

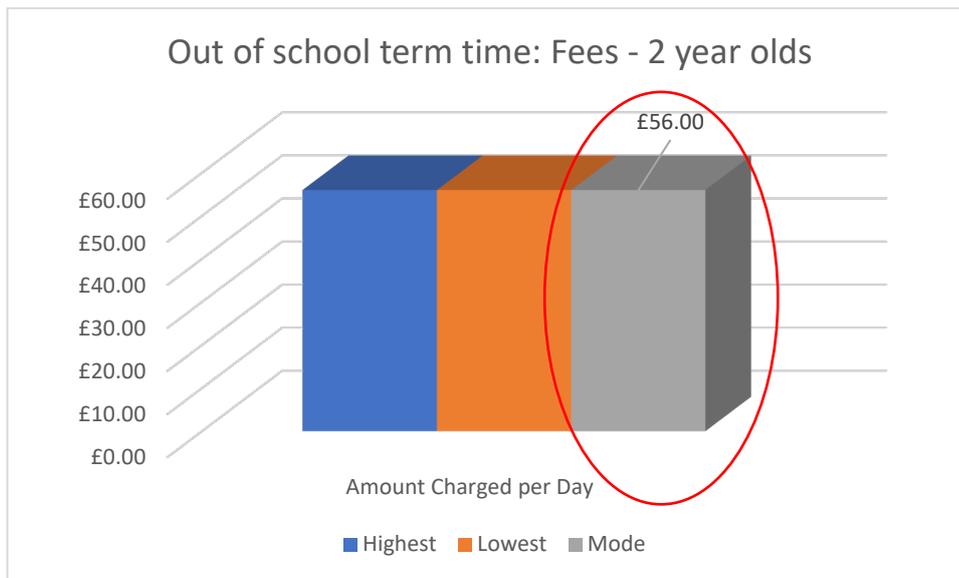


NB: It is unusual for out of school care to provide for 1 year olds. Possible reporting error.

Table: Out of school care – 2 year olds: term time

2 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest			£56.00		
Lowest			£56.00		
Mode			£56.00		

Chart: Out of school care – 2 year olds: term time



NB: It is unusual for out of school care to provide for 2 year olds. Possible reporting error.

Table: Out of school care – 3 year olds: term time

3 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	-	£11.50	£36.50	£37.72	-
Lowest	-	£4.00	£8.00	£37.72	-
Mode	-	£11.00	N/A	£37.72	-

Chart: Out of school – 3 year olds: term time

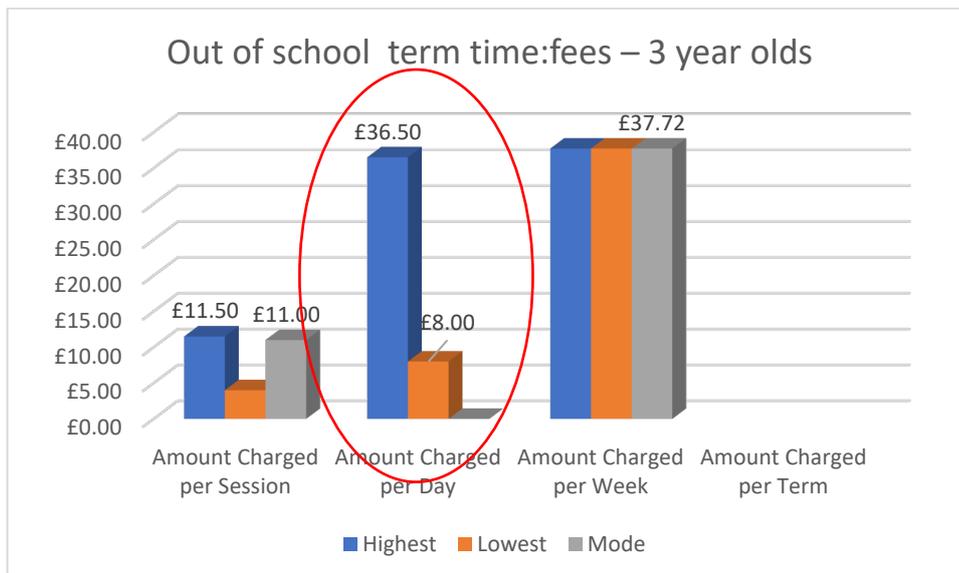


Table: Out of school care – 4 year olds: term time

3 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	-	£12.00	£8.00	£37.72	-
Lowest	-	£4.00	£8.00	£37.72	-
Mode	-	£9.00	£8.00	£37.72	--

Chart: Out of school – 4 year olds: term time

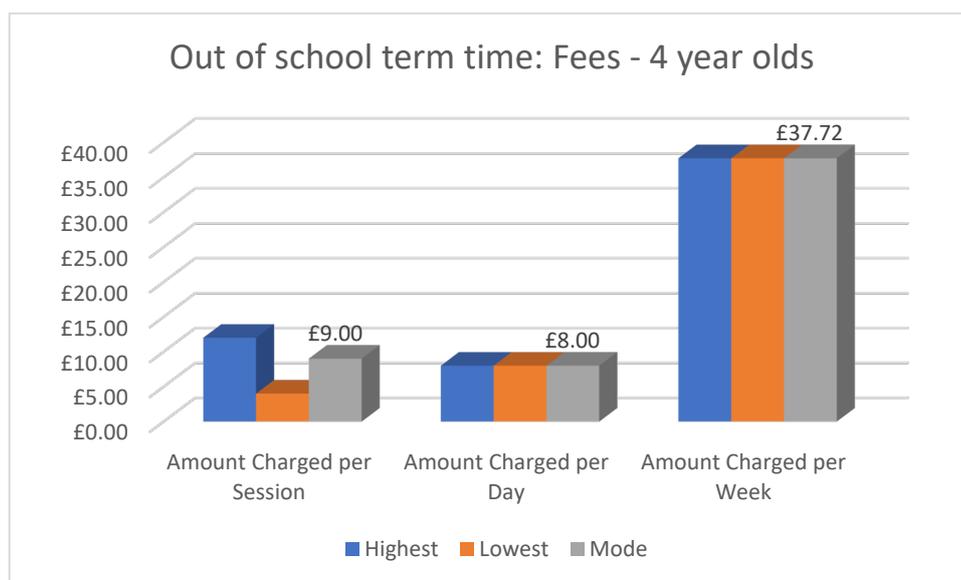


Table: Out of school care – 5-7 year olds: term time

5-7 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	£1.00	£12.00	£10.00	£37.72	-
Lowest	£1.00	£3.50	£8.00	£37.72	-
Mode	£1.00	£9.00	N/A	£37.72	--

Chart: Out of school – 5-7 year olds: term time

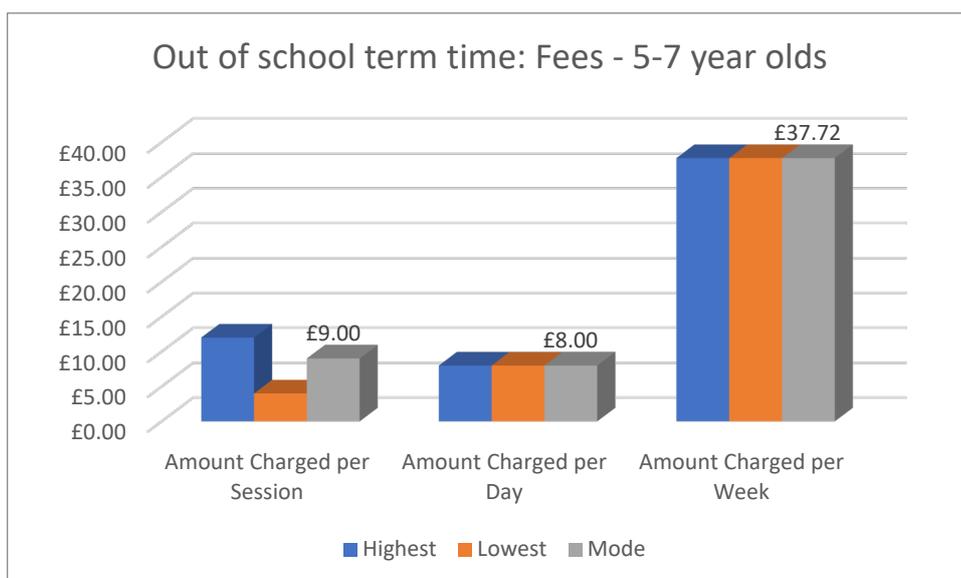
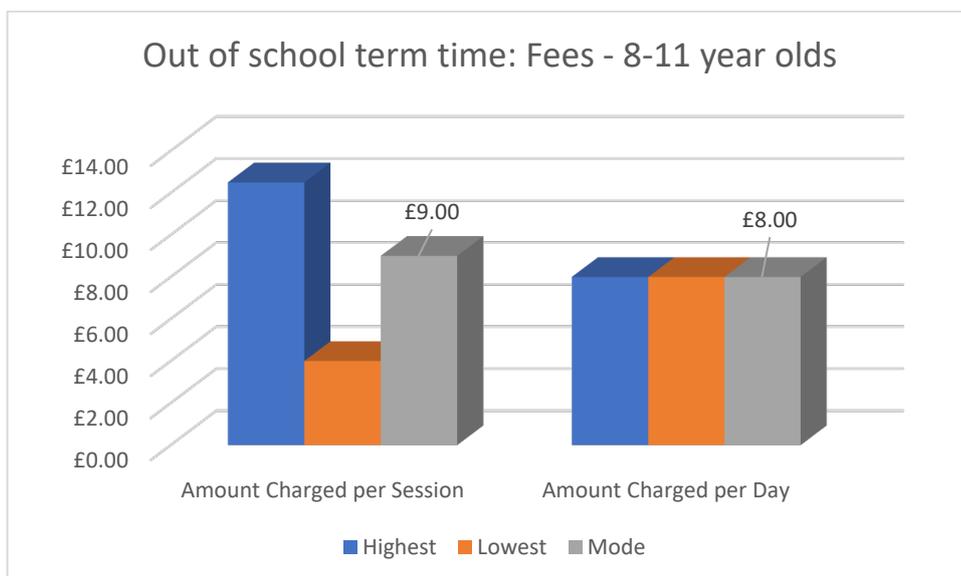


Table: Out of school care – 8-11 year olds: term time

8-11 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	-	£12.50	£8.00	-	-
Lowest	-	£4.00	£8.00	-	-
Mode	-	£9.00	£8.00	-	--

Chart: Out of school – 8-11 year olds: term time



- It would appear from the above data that the terms 'session' and 'day' may have been used interchangeably

Out of school - fees by age: holidays

Table: Out of school care – 1 year olds: holidays

1 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	-	£49.00	£66.00	£300.00	-
Lowest	-	£49.00	£66.00	£300.00	-
Mode	-	£49.00	£66.00	£300.00	-

Chart: Out of school care – 1 year olds: holidays

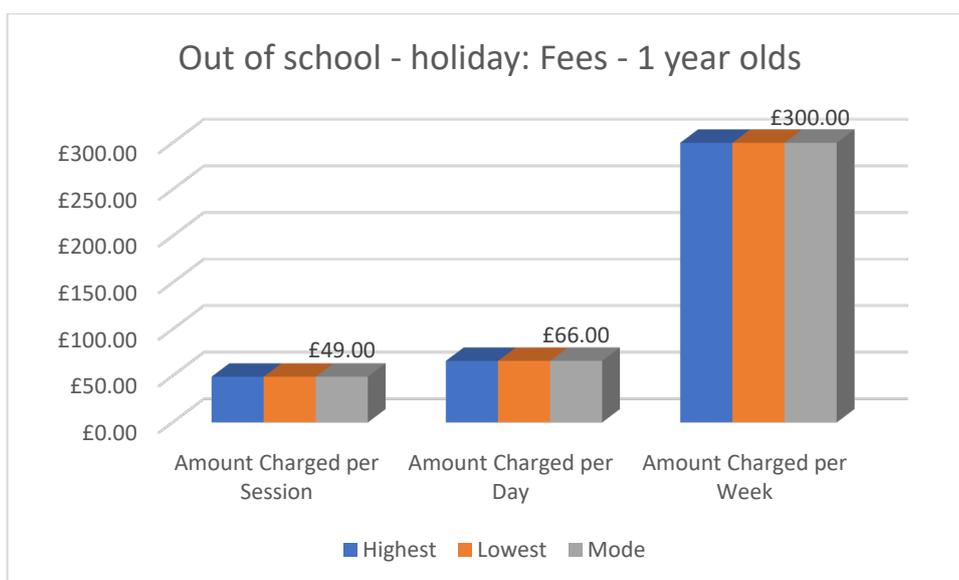


Table: Out of school care – 2 year olds: holidays

2 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	-	£46.00	£63.00	£290.00	-
Lowest	-	£46.00	£63.00	£290.00	-
Mode	-	£46.00	£63.00	£290.00	-

Chart: Out of school care – 2 year olds: holidays

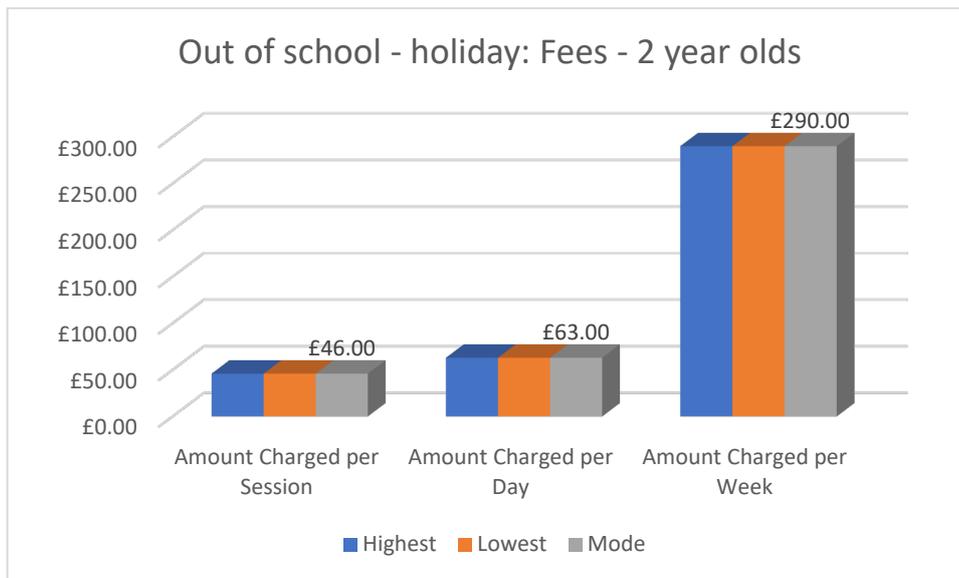


Table: Out of school care – 3 year olds: holidays

3 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest	-	£45.00	£60.00	£280.00	-
Lowest	-	£45.00	£35.00	£280.00	-
Mode	-	£45.00	N/A	£280.00	-

Chart: Out of school care – 3 year olds: holidays

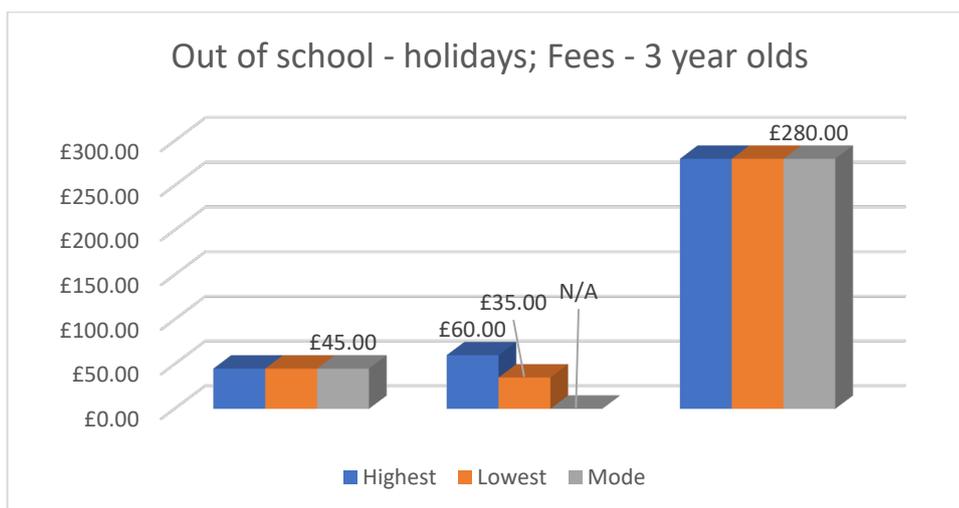


Table: Out of school care – 4 year olds: holidays

4 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest		£45.00	£60.00	£280.00	-
Lowest		£45.00	£25.00	£180.00	-
Mode		£45.00	N/A	N/A	-

Chart: Out of school care – 4 year olds: holidays

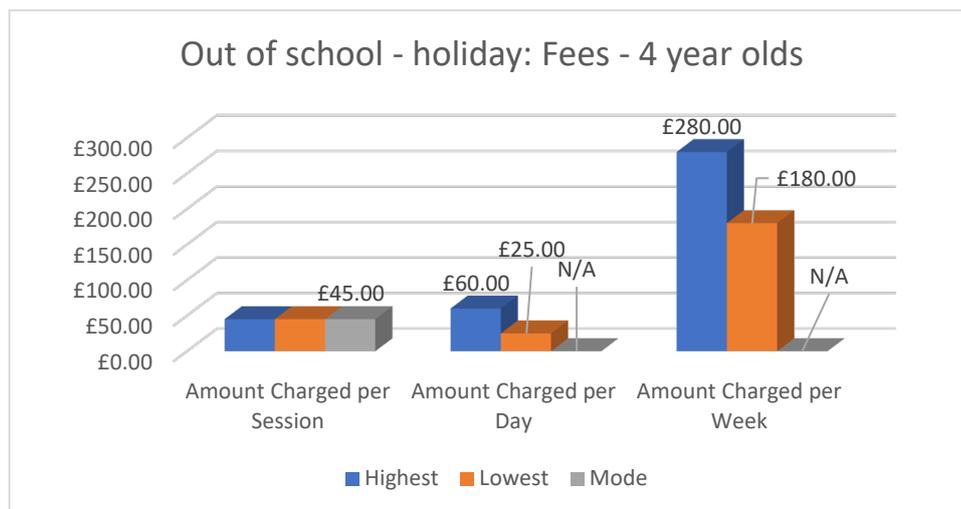


Table: Out of school care – 5-7 year olds: holidays

5-7 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest			£40.00	£180.00	
Lowest			£25.00	£180.00	
Mode			N/A	£180.00	

Chart: Out of school care – 5-7 year olds: holidays

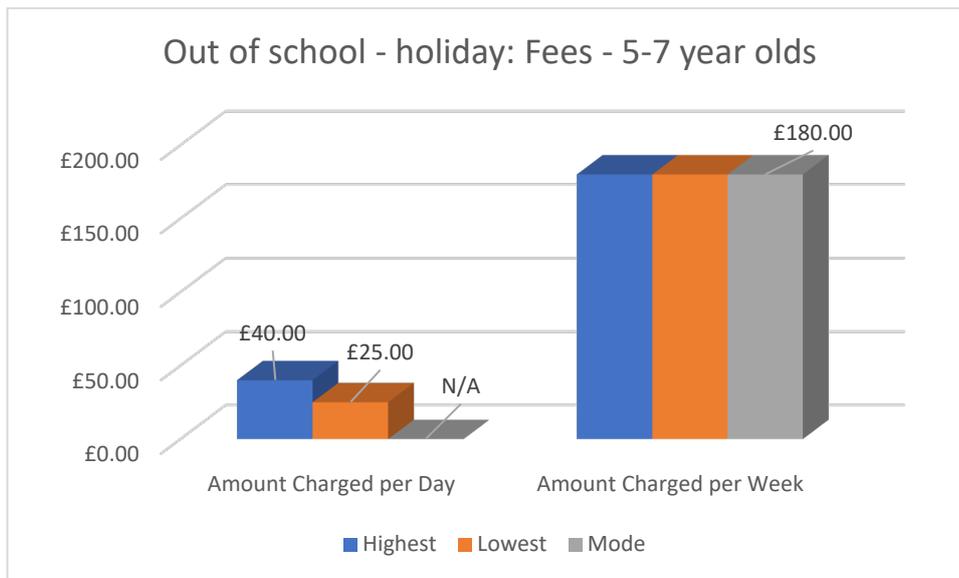
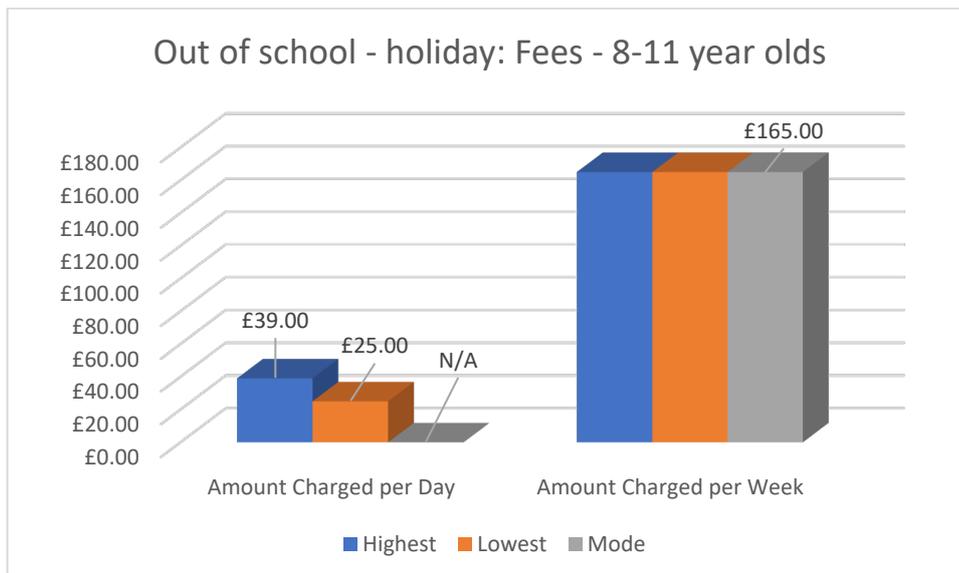


Table: Out of school care – 8-11 year olds: holidays

8-11 year olds	Amount Charged per Hour	Amount Charged per Session	Amount Charged per Day	Amount Charged per Week	Amount Charged per Term
Highest			£39.00	£165.00	
Lowest			£25.00	£165.00	
Mode			N/A	£165.00	

Chart: Out of school care – 8-11 year olds: holidays

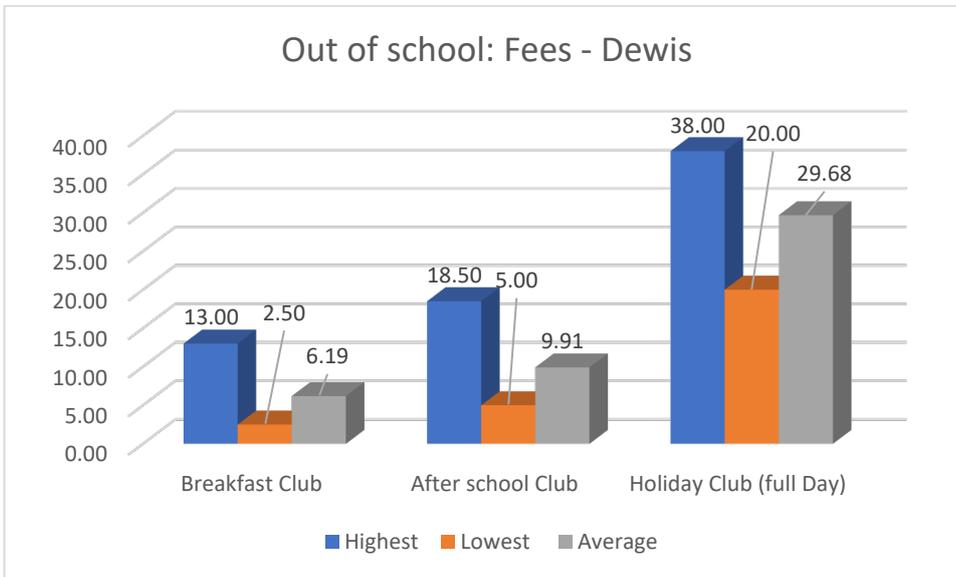


Out of school: Cardiff - fees as per Dewis records

Table: Out of school: Cardiff - fees as per Dewis records

Out of School	Highest	Lowest	Average
Before school	£13.00	£2.50	£6.19
After school Club	£18.50	£5.00	£9.91
Holiday Club (full Day)	£38.00	£20.00	£29.68

Chart: Out of school: Cardiff - fees as per Dewis records



- The modal fee rate for 5 – 11 year olds for after school is £9.00, which is lower than the £9.91 average shown on Dewis
- The average fee for holiday care on Dewis is £29.68 per day, or £148.40 per week, which is less than the modal weekly holiday fee of £180 for 5-11 year olds

Out of school: opening times and atypical hours: term time

Table: Out of school: opening times and atypical hours

	Earliest open (am)	Latest open (am)	Earliest close (am)	Latest close (am)	Earliest open (pm)	Latest open (pm)	Earliest close (pm)	Latest close (pm)	Number before 8 am	Number after 6 pm
Monday	3.00	8.30	6.00	12.30	14.45	15.30	17.30	18.00	8	0
Tuesday	3.00	8.30	6.00	12.30	14.45	15.30	17.30	18.00	8	0
Wednesday	3.00	8.30	6.00	12.30	14.45	15.30	17.30	18.00	8	0
Thursday	3.00	8.30	6.00	12.30	14.45	15.30	17.30	18.00	8	0
Friday	3.00	8.30	6.00	12.30	14.45	15.30	17.30	18.00	8	0

NB: As some out of school settings operate both school and after school settings, earliest and latest start and finish times for both sessions have been included.

- The reported opening to closing times of 3.00am to 6.00am are likely to be inaccurate (Open from 15.00 to 18.00 is more likely to be correct)

Chart: Out of school: opening times and atypical hours: term time

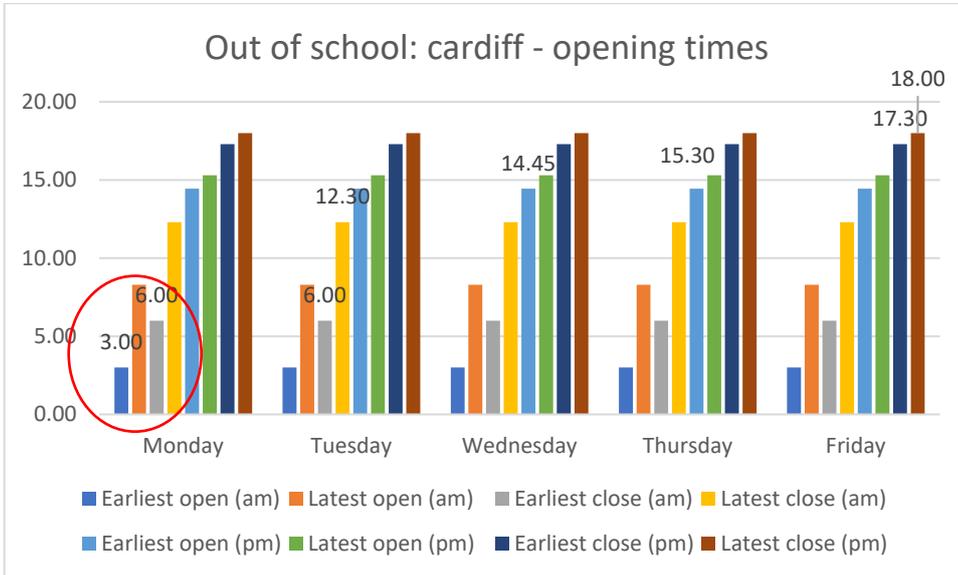
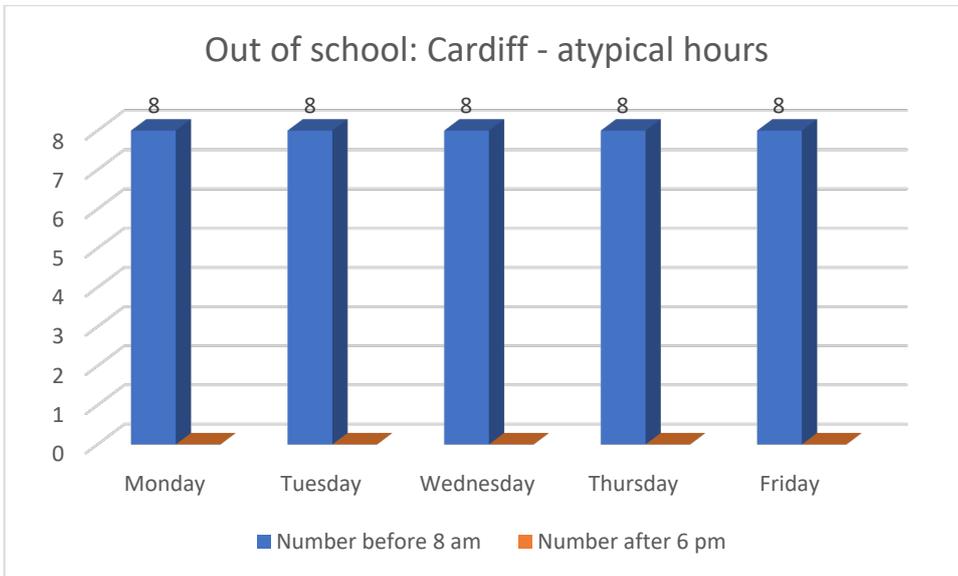


Chart: Out of school: - settings open atypical hours: term time



- By the nature of their provision, it was not expected that large numbers of out of school settings would provide for atypical hours during term time. 8 settings in total open before 8.00 am, with 6 in Cardiff North and 2 in Cardiff West.

Holidays

Table: Out of school: Holiday operation – holidays open

	Yes	No	Don't know
Summer	12	1	0
October half term	8	3	2
Christmas	4	8	1
Feb half term	7	4	2
Easter	10	2	1
May half term	8	4	1

Chart: Out of school: holiday operation – holidays open

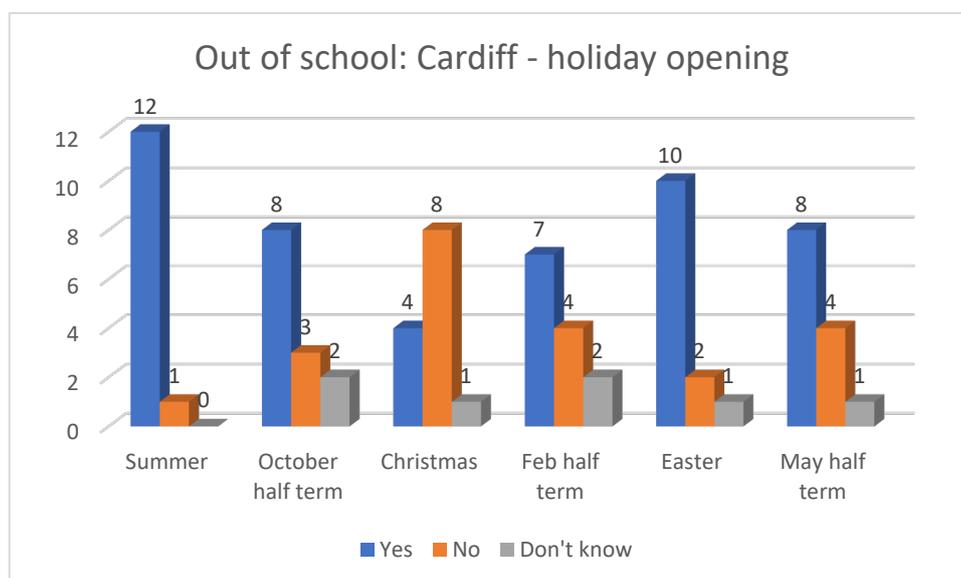
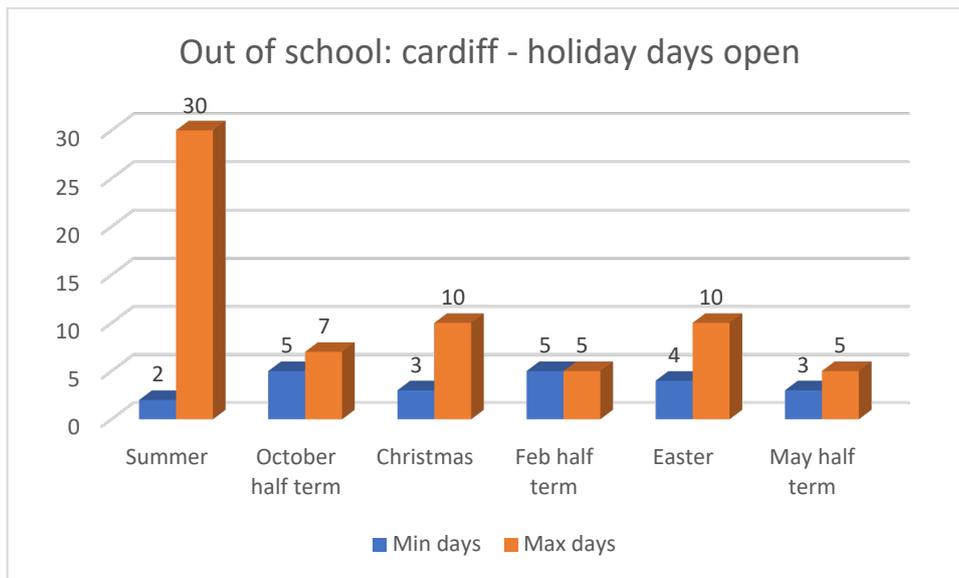


Table: Out of school – holiday days open

	Minimum days open days	Maximum days open days
Summer	2	30
October half term	5	7
Christmas	3	10
Feb half term	5	5
Easter	4	10
May half term	3	5

Chart: Out of school – holiday days open



Out of school: opening times and atypical hours: holidays

The four 'holiday only' settings did not return start and finish time data. Data supplied by a 'term time and holiday provider' indicates opening at 07.45 and closing at 18.00. Other data supplied referred to after school operating times.

Out of school care: Flying Start

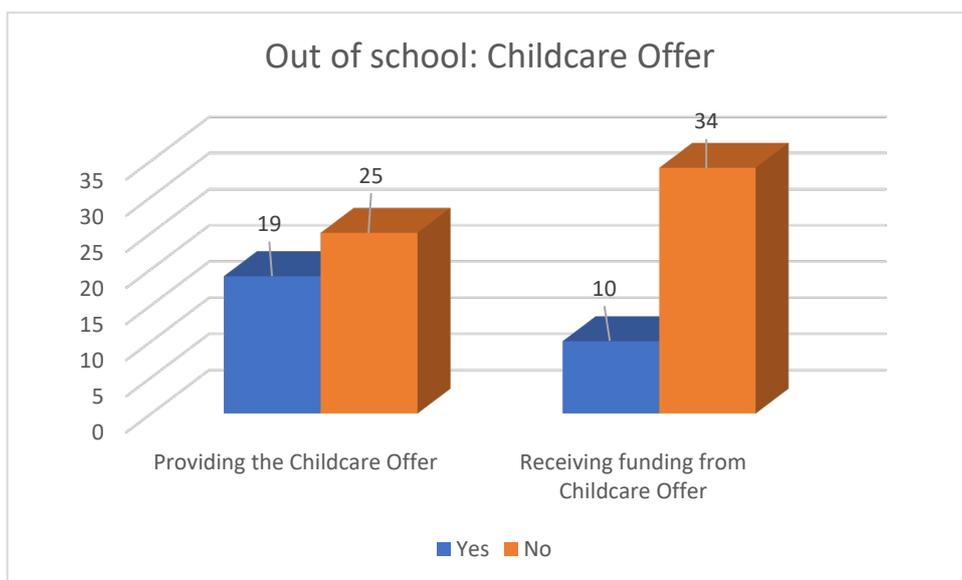
- One out of school setting reported being funded to provide Flying Start but reported no children attending. No out of school setting is contracted to provide Flying Start places in Cardiff.

Out of school: Childcare Offer

Table: Out of school: Childcare Offer

	Yes	No
Providing the Childcare Offer	19	25
Receiving funding from Childcare Offer	10	34

Chart: Out of school: Childcare Offer

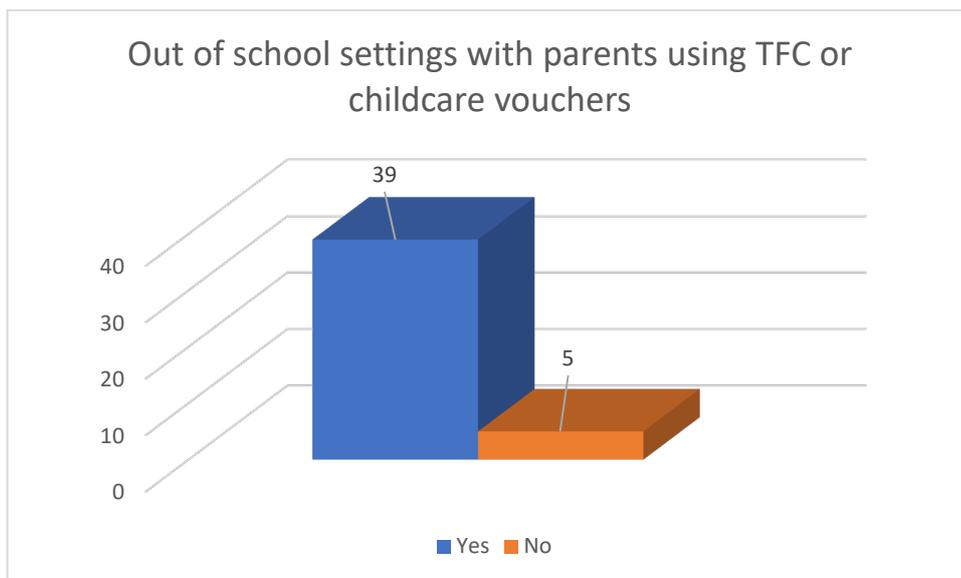


Out of school: Tax Free Childcare or childcare vouchers

Table: Out of school settings with parents using Tax Free Childcare or childcare vouchers.

Out of school settings with parents using Tax Free Childcare or childcare vouchers	
Yes	39
No	5

Chart: Out of school settings with parents using Tax Free Childcare or childcare vouchers.



Out of school: early education

No out of school providers reported providing early education placements

Strengths and weaknesses

- Overall, there are more vacancies across out of school care (2070) than there are children waiting for an immediate place (219) except for a shortfall of 4 places for playscheme sessions (10 children reported on waiting list; 6 vacancies)
- However, in Cardiff South West, the data appears to show a shortfall of 88 after school places (122 children waiting; 34 vacancies). NB: Please also see chapter 10: Welsh medium and WESP as this provider is a Welsh medium after school club. It is noted that this setting reports an average weekly attendance of around 300 children and is registered for 80 places per day, 400 places per week. It may be the case that the data relating to 'vacancies' has been transposed into the 'children waiting for an immediate place' column in error.

7.5. Open access play provision

The following data tables and charts are based on data collected via SASS

Table: Open access play provision headline data

Number of Registered Settings	1	Term time only	-
		Term time and holiday	1
		Holiday only	-
Number of Registered Places	75		
Number of children on books by age	6		
Number of children by attendance	140	Full time	40
		Part time	80
		Ad hoc	20
Main Language of setting			
English/Both	1 (-)		
Welsh	-	Provide Active Offer	-
		Working towards Active Offer	-
Flying Start provision	-		
Flying Start and fee paying	-		
Flying Start only	-		
Number Providing Childcare Offer (Number Funded via Childcare Offer)	-		
Number Offering Tax Free Childcare or Vouchers	-		

NB: As there is only data relating to a single setting, where simpler to do so, information is conveyed through bullet pointed text

Open access play provision: term time and holidays

- The open access play provision reports operating term-time and holidays.

Table: Open access play provision settings by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Total	-	-	1	-	-	-	1

Table: Open access play provision places by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Total	-	-	75	-	-	-	75

- The open access play provision is located in Cardiff South East and registered for 75 places

Open access play provision: children on the books by age

Table: Open access play provision: children on the books by age

Age	Number of children
Under 1	-
1 year	-
2 years	6
3 years	-
4 years	-
5 - 7 years	-
8 - 11 years	-
12 to 14	-

The only children reported as on the books by age were 6 two year olds. This data is likely to be incorrect.

Open access play provision: children on the books by attendance type

Table: Out of school: children on the books by attendance type

Full time	40
Part time	80
Ad Hoc	20

- The majority of children attend on a part-time basis (80)

Open access play provision – waiting lists and vacancies

- The service reported no waiting lists or vacancies

Open access play provision: languages & Active Offer

- The setting reports it is an English only setting, with no other languages used
- It is not working towards the Active Offer
- There is no Welsh language open access play provision

Open access play provision: fees by age: term time

- No fee information was supplied

Open access play provision: Cardiff – fees as per Dewis records

- No fee information was available

Open access play provision: opening times and atypical hours: term time

- No opening times were supplied

Open access play provision: Flying Start; Childcare Offer; Tax Free Childcare and childcare vouchers

- The setting reported it does not provide Flying Start, the Childcare Offer, has parents accessing Tax Free Childcare or childcare vouchers, or provide early years education placements.

7.6. Creche

The following data tables and charts are based on data collected via SASS

Table: Creche headline data

Number of Registered Settings	1	Term time only	1
		Term time and holiday	-
		Holiday only	-
Number of Registered Places	20		
Number of children on books by age	12		
Number of children by attendance	12	Full time	-
		Part time	12
		Ad hoc	-
Main Language of setting			
English/Both	1 (-)		
Welsh	-	Provide Active Offer	-
		Working towards Active Offer	1
Flying Start provision			
Flying Start and fee paying	1		
Flying Start only	-		
Number Providing Childcare Offer (Number Funded via Childcare Offer)	1 (1)		
Number Offering Tax Free Childcare or Vouchers	-		

NB: As there is only data relating to a single setting, where simpler to do so, information is conveyed through bullet pointed text

Creche: term time and holidays

- The creche operates term-time only

Table: Out of school settings by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Total	-	-	-	-	1	-	1

Table: Out of school places by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Total
Total	-	-	-	-	20	-	20

- The creche is located in Cardiff South West and registered for 20 places

Creche: Children on the books by age

Table: Creche: Children on the books by age

Age	Number of children
Under 1	-
1 year	-
2 years	5
3 years	7
4 years	-
5 - 7 years	-
8 - 11 years	-
12 to 14	-
15 to 17	-

- All children on the creche's books are aged 2 or 3 years

Creche: Children on the books by attendance type

Table: Creche: Children on the books by attendance type

Full time	-
Part time	12
Ad Hoc	-

- All children on the creche's books attend on a part-time basis

Creche: waiting lists and vacancies

- The setting reports no waiting list and 11 vacancies.

Creche: languages & Active Offer

- The setting reports it is an English only setting, with no other languages used, but also reports it is working towards the Active Offer.
- There is no Welsh language creche provision

Creche: fees by age: term time

- 2 year olds and for 3 year olds were reported to be charged £10.00 per session.

- The creche does not operate during school holidays, so there are no holiday fee data

Creche: Cardiff – fees as per Dewis records

Table: Creche: Cardiff – fees as per Dewis records

Creche	Highest	Lowest	Average
Session	£11.00	£11.00	£11.00

- There is a discrepancy between the data supplied for the SASS and that held on Dewis

Creche: opening times and atypical hours: term time

Table: Out of school: opening times and atypical hours

	Open	Close
Monday	9.15	11.45
Tuesday	9.15	11.45
Wednesday	9.15	11.45
Thursday	9.15	11.45
Friday	9.15	11.45

- The creche operates a 'mornings' service. It does not operate any atypical hours.

Creche: Flying Start

- The creche reported being funded to provide Flying Start. The numbers of children reported as attending are line with the Flying Start funded places data.

Creche: Childcare Offer

Table: Creche: Childcare Offer

	Yes	No
Providing the Childcare Offer	1	-
Receiving funding from Childcare Offer	1	-

Creche: Tax Free Childcare or childcare vouchers

Table: Creche with parents using Tax Free Childcare or childcare vouchers.

Creche settings with parents using Tax Free Childcare or childcare vouchers	
Yes	-
No	1

- The creche provides, and receives funding via the Childcare Offer
- The creche does not currently have any parents utilising Tax Free Childcare or childcare vouchers
- The creche does not provide any early education placements

7.7. Nannies

As of June 1st, 2021, CIW reported that 14 nannies were registered on the 'Childcare at Home Voluntary Approval Scheme'. All were contacted by Cardiff Family Advice and Support and supplied with details as to how to create a Dewis record for their service. As of December 1st, 2021, none had taken up this offer and there are no nanny records live on Dewis.

8. Understanding the Needs of Parents/ Carers

8.1. Current use

The SASS data return required respondents to identify the average weekly number of children attending for each service offered during the 4 weeks from the week starting 07.06.2021 to the week beginning 04.07.2021. Although there are some concerns about the robustness of this data – for example the average figure reported does not always match the calculated average from the 4 week's attendance – the data below shows the reported average weekly usage of services offered by all provider types.

It is not possible to identify the total number of places offered by service type across, or by, provider types. Providers reported on whether they provide a service (such as full daycare; half day care/half day nursery AM; after school); and the maximum number of CIW registered places, but not on how many places are offered by each service. Therefore, unless a provider only offers one type of service, it is not possible to identify what proportion of available places *by service* have been filled.

For example, an out of school setting registered for 24 places, only providing after school care would be providing 24 places x 5 days = 120 places per week. If the setting reported average weekly attendance of 80 (16 children per night) it is possible to calculate that 66% of the setting's capacity is being utilised.

For settings that offer services simultaneously, such a full daycare setting, registered for 80 places, providing full daycare for under 2-year-olds, a playgroup session for 2- to 3-year-olds and a wrap-around childcare session for 3- to 4-year-olds funded via the Childcare Offer), the SASS data does not identify how many places are being made available for each service. As it is not clear how the vacancies data has been calculated, and what period it relates to, the sum of attendance and vacancies cannot be seen as a valid method of calculating the number of places available by service type.

NB: Average daily attendance has been calculated by dividing the average weekly attendance by 5. Figures have been rounded up and where the reported and calculated average weekly attendance figures differ, the higher number has been used. The numbers of registered settings providing the service are show in brackets following the service. A breakdown by provider types delivering each service is also included.

Table: use of places by service: average weekly attendance

Service (number of providers)	Weekly average attendance	Daily average attendance
Before school (197)	2,737	547.4
Early education (144)*	2,672	534.4
Full daycare (232)	7,445	1,489
Half day care/half day nursery AM (135)	2,025	405
Playgroup/ Cylch Meithrin AM (12)	559.5	111.9
Mornings (37)	2,161	432.2
Lunch (29)	1,067	213.4
Half day care/half day nursery PM (127)	1,213	242.6
Playgroup/ Cylch Meithrin PM (10)	318.75	63.75
Afternoons (23)	962	192.4
After school (230)	5,941	1,188.2
Evenings (14)	77.5	15.5
Overnight (4)	3	0.6
Weekends (6)	12	2.4
Creche (1)	none reported	-
Playscheme sessions (6)	none reported (term time)	-

* As previously noted, only 7 setting are currently funded for 56 children to access their early education placement. Therefore, maximum weekly attendance for this service could only be 56 children x 5 days = 280

Chart: use of places by service: average weekly attendance

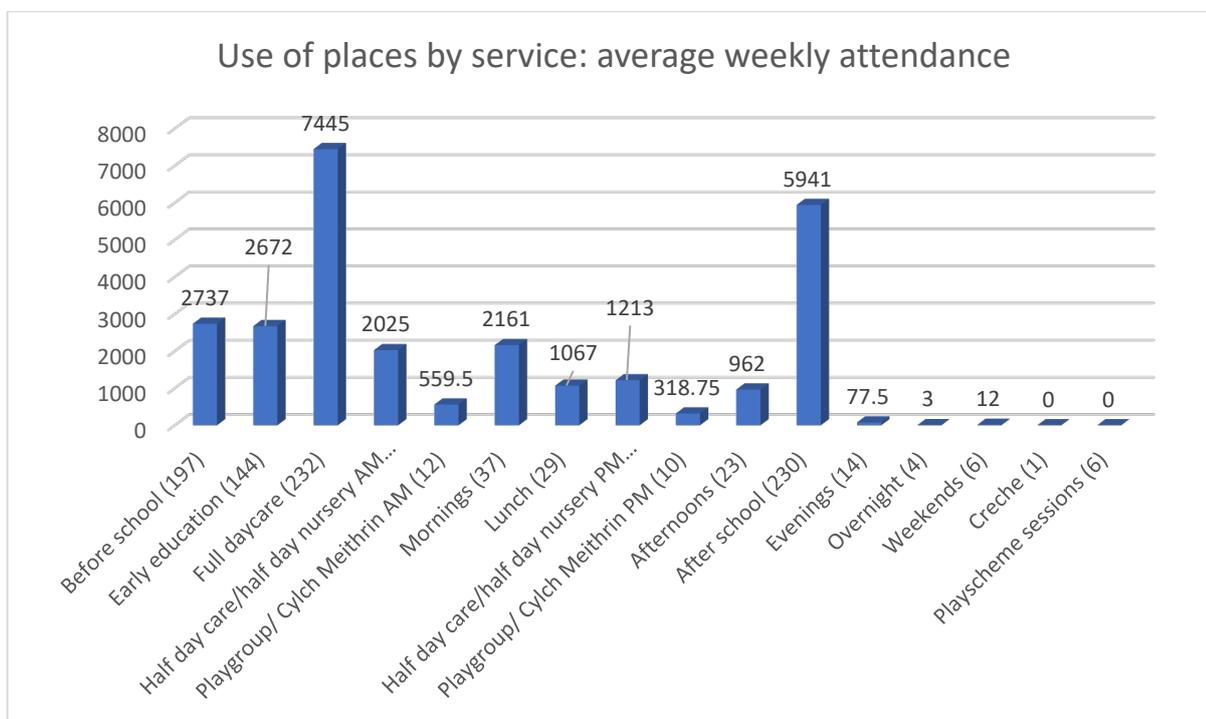


Table: services by provider type

	Full daycare	Sessional day care	Out of school	Childminders	Open Access Play	Creche
Before school (197)	28	-	20	149	-	-
Early education (144)	47	11		86	-	-
Full daycare (232)	64	-	-	168	-	-
Half day care/half day nursery AM (135)	58	-	-	77	-	-
Playgroup/ Cylch Meithrin AM (12)	12	-	-	-	-	-
Mornings (37)		36				1
Lunch (29)	19	10	-	-	-	-
Half day care/half day nursery PM (127)	58	-	-	69	-	-
Playgroup/ Cylch Meithrin PM (10)	10	-	-	-	-	-
Afternoons (23)		23	-	-	-	-
After school (230)	28	-	38	164	-	-
Evenings (14)	6	-	-	8	-	-
Overnight (4)		-	-	4	-	-
Weekends (6)	1	-	-	5	-	-
Creche (1)	-	-	-	-		1
Playscheme sessions (6)	-	-	5	-	1	-

- Other data supplied via the SASS strongly indicates that the majority of children attend childcare on a part time basis (of the 10,828 children on providers books, 8,632 are recorded as attending part-time). It

is therefore not possible to identify how many *different* children in total attended registered childcare during the SASS reporting period (07.06.2021 – 04.07.2021)

- Across childminders, full daycare, sessional day care and out of school care, for the county as whole, only two services reported net demand above vacancies, with a shortfall of 6 lunch places in sessional day care, and 4 playscheme places in out of school care. Some provider type, service or NPA specific data has identified that 'demand above capacity to supply' may exist, but further investigation will be required due to concerns about the robustness of some of the data supplied to SASS.
- The services with the highest levels of use (full daycare, half day care/half day nursery AM and half day care/half day nursery PM, are also the services where full daycare providers have the highest number of vacancies across Cardiff (1,371 for full daycare; 1,266 for half day AM, and 1,043 vacancies for half day PM)
- On average, across the period w/c 07.06.2021 to w/c 04.07.2021, providers reported **27,194** weekly child attendances. This would equate to an average of **5,439** daily child attendances (27,194/5). However, this does not mean that 5,439 different children accessed childcare, as the same child could attend a number of settings and services within a single day.

8.2. Demand for Childcare (parent survey)

Cardiff received 406 completed parental surveys. Notice of the survey was sent to:

- all childcare settings,
- Schools, via a newsletter distributed to all schools through Education,
- all Council employees, via 'the Councils corporate employee email distribution list
- and promoted on the Council's website.

Given the relatively small number of survey responses, the data cannot be seen to be representative of the population as a whole. The survey should be seen as a snapshot, reflecting the views and opinions of the parents who completed the survey at the time of completion. It should also be noted as not all respondents answered all questions, the number of responses received (n) has been included.

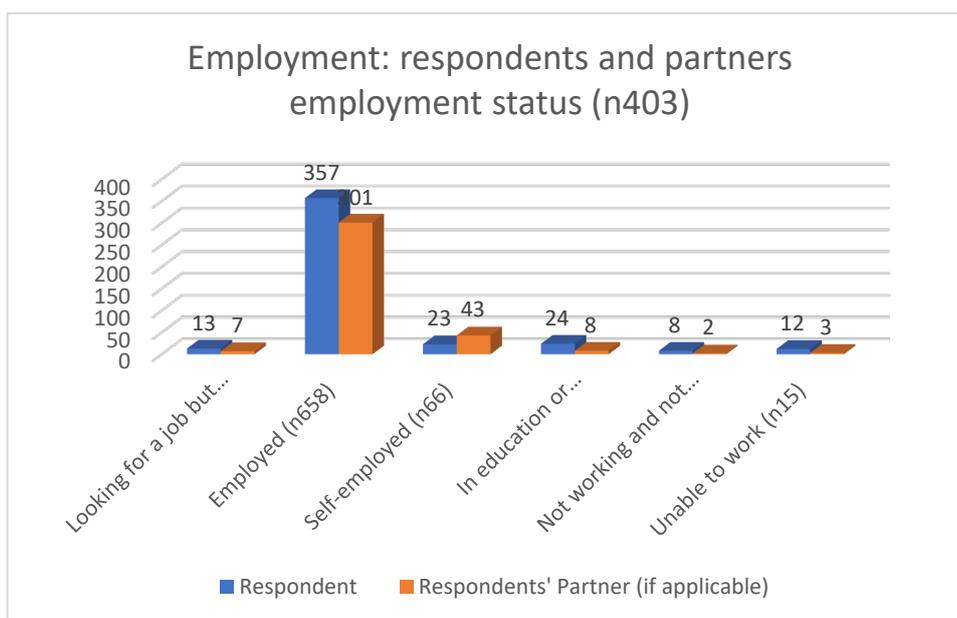
Survey findings – respondents

Employment

Table: respondents and partners employment status (n403)

	Looking for a job but not working yet (n20)	Employed (n658)	Self-employed (n66)	In education or training (n32)	Not working and not looking for a job (n10)	Unable to work (n15)
You	13	357	23	24	8	12
Your Partner (if applicable)	7	301	43	8	2	3

Chart: respondents and partners employment status (n403)



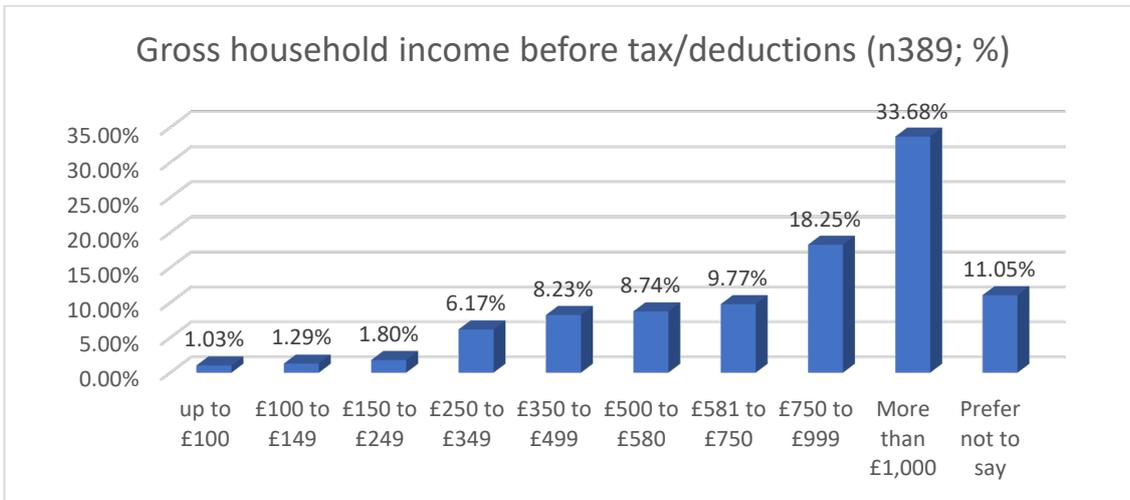
- The largest number of respondents (357) and their partners (301) were in employment. The smallest number (8) and their partners (2) were not working and not looking for a job

Income

Table: Gross household income per week (before deductions/tax) (n389)

Gross household income per week (before deductions/tax) (n389)	%	Number
up to £100	1.03%	4
£100 to £149	1.29%	5
£150 to £249	1.80%	7
£250 to £349	6.17%	24
£350 to £499	8.23%	32
£500 to £580	8.74%	34
£581 to £750	9.77%	38
£750 to £999	18.25%	71
More than £1,000	33.68%	131
Prefer not to say	11.05%	43

Chart: Gross household income per week (before deductions/tax)



- The largest percentage of respondents were earning over £1,000 per week before deductions
- Only 16 (4.12%) respondents reported household income of £249 per week or under

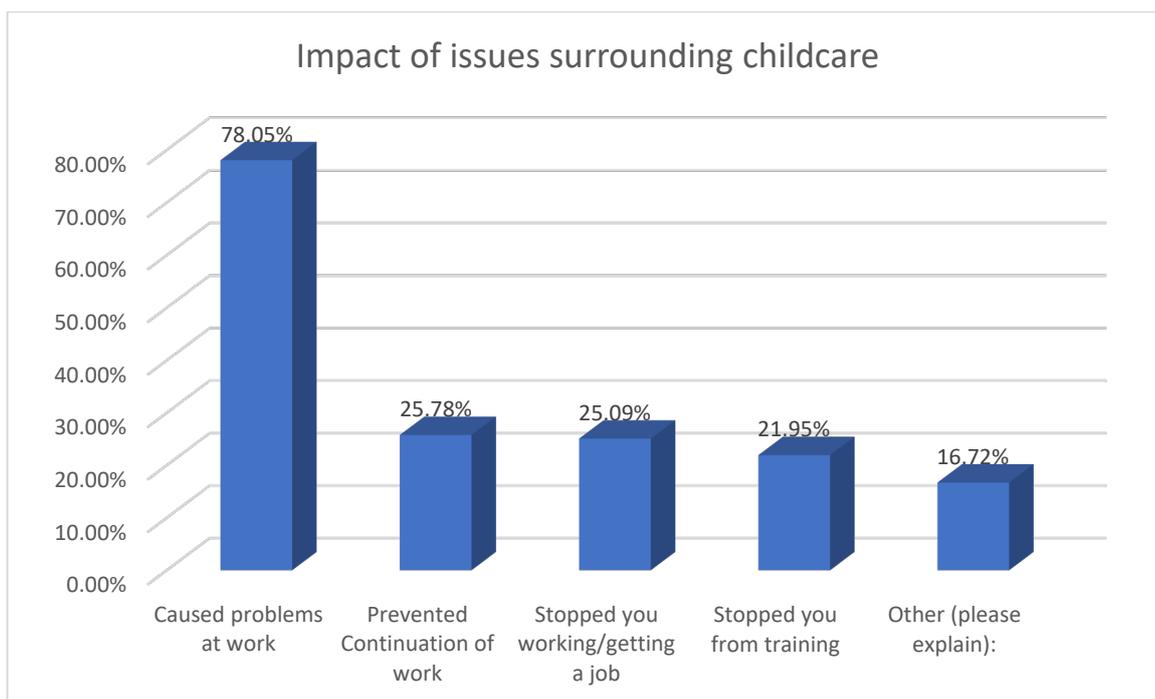
Childcare issues: impact on employment

Table: 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): (n287)

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): (n287)	%	Number
Caused problems at work	78.1%	224
Prevented Continuation of work	25.8%	74
Stopped you working/getting a job	25.1%	72
Stopped you from training	22.0%	63
Other (please explain):	16.7%	48

- It is not possible to identify if the 'childcare issues' above were caused or exacerbated by Covid, or whether the same level of response would have occurred in a non-Covid environment

Chart: 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): (n287)



Comments received to this question included:

"Had to change days and hours as the cost is very expensive and not affordable"

"Being sent home poorly. But biggest issue needing to drop hours in work as not financially worthwhile continuing full time hours due to costs"

"Significant disruption to work. Daughter being sent home or for a covid test at Short notice"

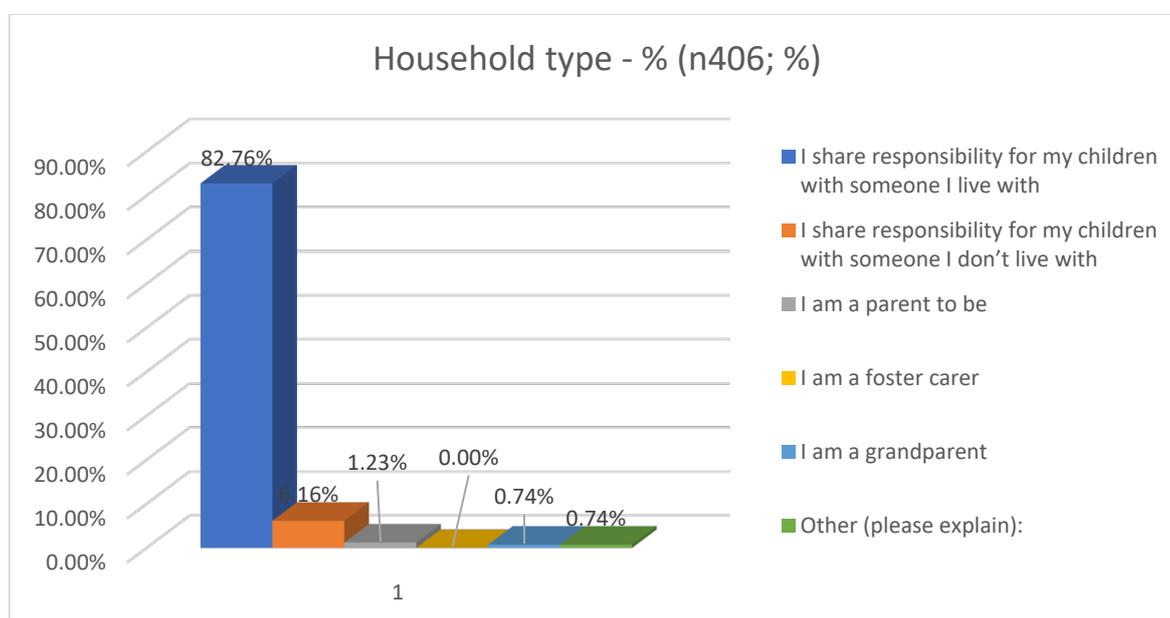
"Stopped from applying for new jobs due to currently being in a sales job with commission. I couldn't afford childcare without the commission."

Household type

Table: household type (n406)

Household Type	%	Number
I share responsibility for my children with someone I live with	82.76%	336
I share responsibility for my children with someone I don't live with	6.16%	25
I am a parent to be	1.23%	5
I am a foster carer	0.00%	0
I am a grandparent	0.74%	3
Other (please explain):	0.74%	3

Chart: Household type



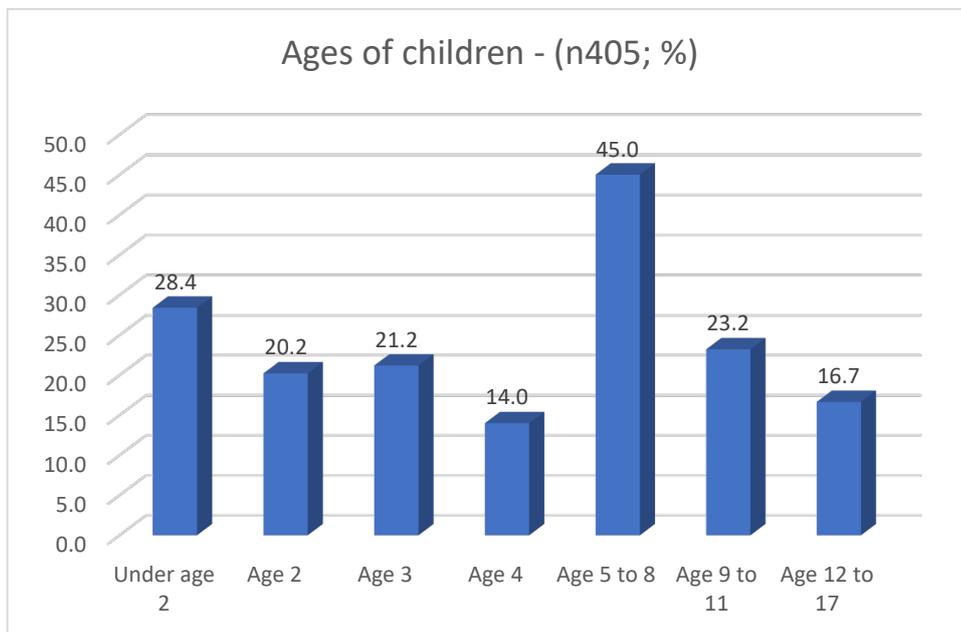
- The majority of respondents (82.76%) reported sharing responsibility for their child with someone they lived with
- No foster carers submitted a completed survey, and less than 1% of responses were from grandparents

Ages of children of respondents

Table: Ages of children of respondents (n405)

Age	%	Number
Under age 2	28.4	165
Age 2	20.2	92
Age 3	21.2	82
Age 4	14.0	59
Age 5 to 8	45.0	150
Age 9 to 11	23.2	62
Age 12 to 17	16.7	33

Chart: Ages of children of respondents



- 60.1% of respondents reported having at least one child aged 8 or under, compared to 39.9% reporting having at least one child aged 9 or above

Children: Disability or long-term illness

Table: Children: Disability or long-term illness (n403)

Do any of your children have a disability or a long-term illness? (n403)	%	Number
Yes	5.5%	22
No	93.8%	378
Prefer not to say	0.7%	3

Chart: Children with a disability or long-term illness (n403)

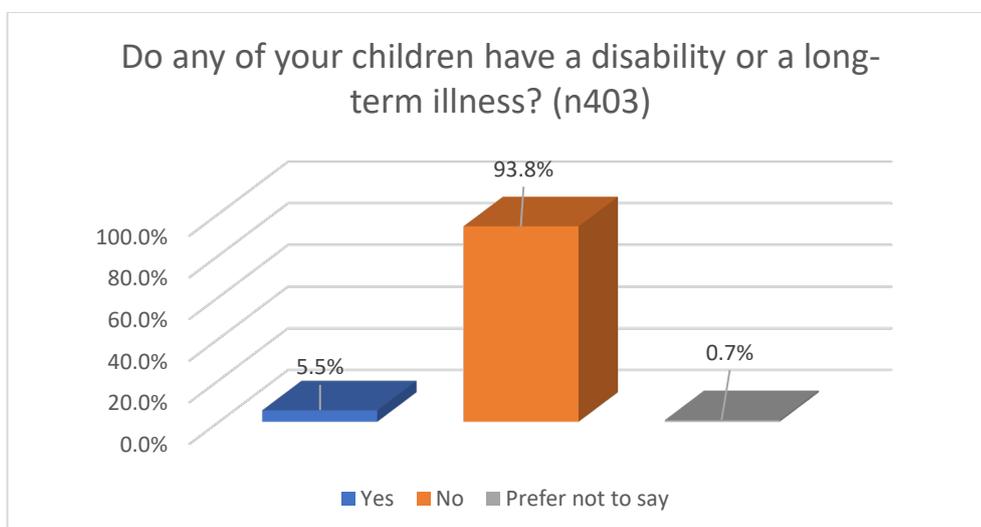
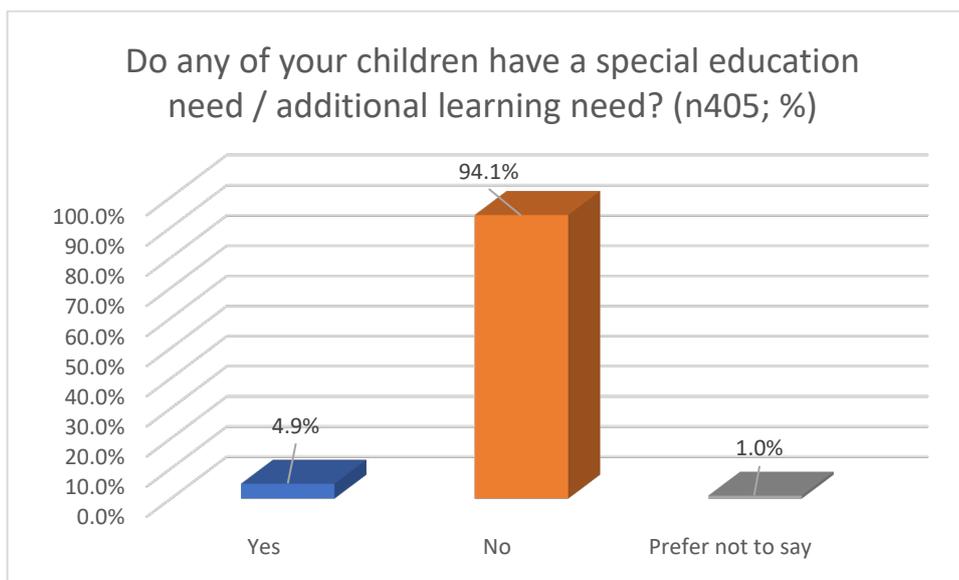


Table: Children: Special Educational Need/Additional Learning Need (n405)

Do any of your children have a special education need / additional learning need (they need additional support with their learning)? (n405)	%	Number
Yes	4.9%	20
No	94.1%	381
Prefer not to say	1.0%	4

Chart: Children: Special Educational Need/Additional Learning Need



Summary

Across all schools, there are 9,446 pupils with a SEN statement, or on School Action or School Action Plus, representing 16.6% of all pupils. This is a higher rate than reported by childcare providers, who identified a total of 265 children “formally identified as having learning difficulties or disabilities”. This is 2.4% of the 10,828 children on childcare providers’ books. Childcare settings may not be informed by parents that a child has been “formally identified as having learning difficulties or disabilities” which would impact on reporting. It is also not clear whether a child being on SEN School Action or SEN School Action Plus would meet the criteria for being “formally identified as having learning difficulties or disabilities”.

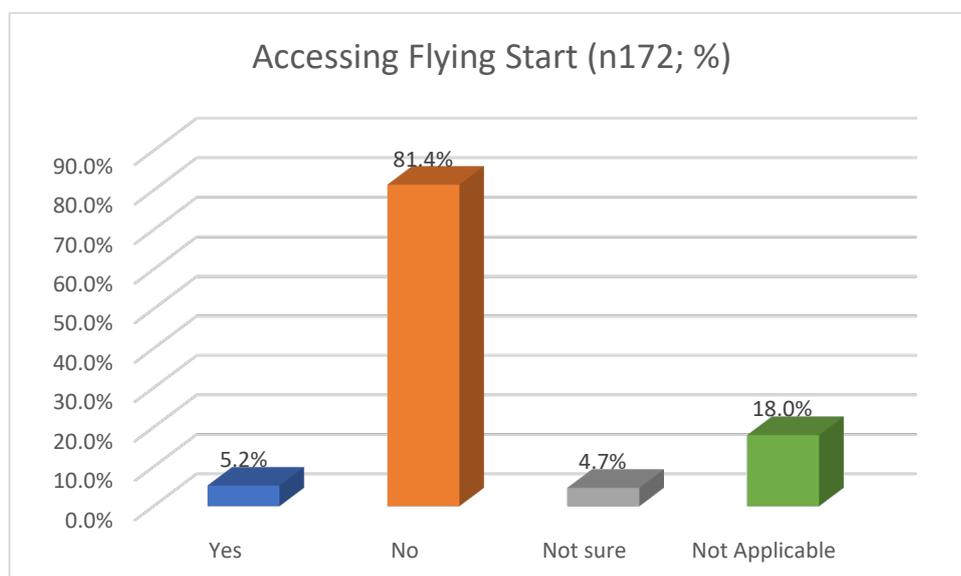
Use of Welsh Government funded services

Flying Start

Table: Accessing Flying Start

Is your age 2 or 3 year old child(ren) accessing Flying Start childcare? (n172)	%	Number
Yes	5.2	9
No	81.4	140
Not sure	4.7	8
Not Applicable	18.0	31

Chart: Accessing Flying Start



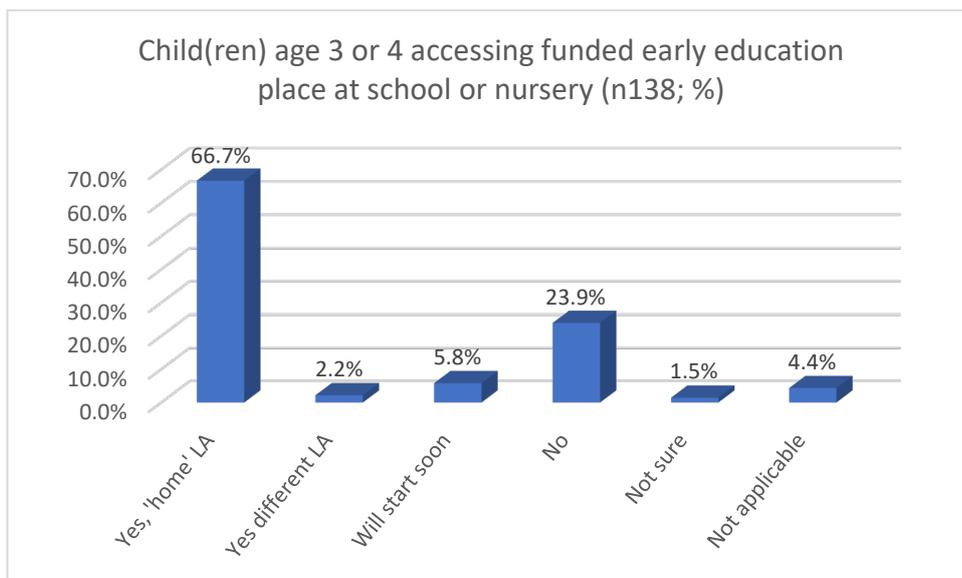
- Only 9 of the 172 respondents replied to indicate they were using Flying Start. This may reflect the geographical nature of the Flying Start provision.
- Not Applicable responses may have come from families not living in a Flying Start area

Accessing funded early education (Foundation Phase Nursery)

Table: Accessing funded early education (Foundation Phase Nursery)

Is your child(ren) age 3 or 4 accessing funded early education place at school or nursery? (n138)	%	Number
Yes, 'home' LA	66.7%	92
Yes different LA	2.2%	3
Will start soon	5.8%	8
No	23.9%	33
Not sure	1.5%	2
Not applicable	4.4%	6

Chart: Accessing funded early education (Foundation Phase Nursery)



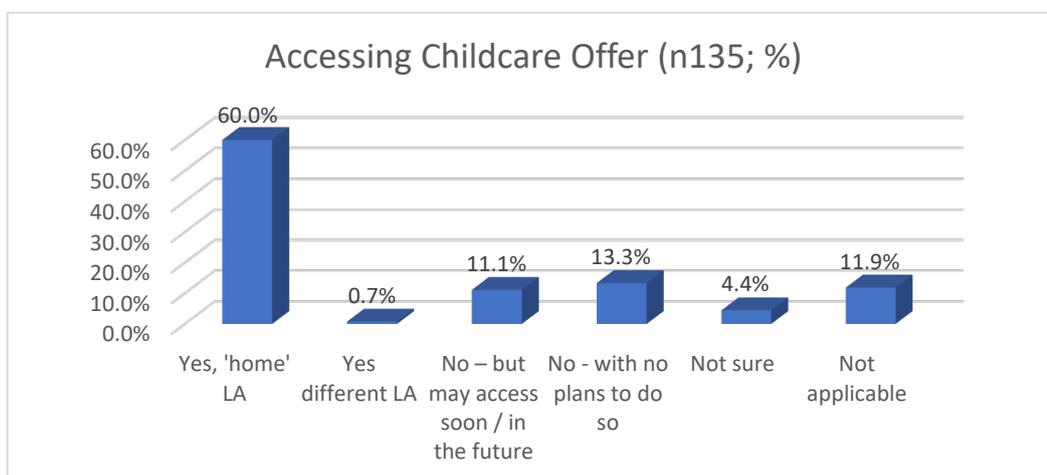
- 68.9% of the 138 respondents indicated their child was accessing a funded early education placement, either in their home authority (66.7%, 92 respondents) or in a different local authority (2.2%, 3 respondents)

Accessing the Childcare Offer

Table: Accessing the Childcare Offer

Is your age 3 or 4 year old child(ren) accessing government funded childcare (the Childcare Offer)? (n135)	%	Number
Yes, 'home' LA	60.0%	81
Yes different LA	0.7%	1
No – but may access soon / in the future	11.1%	15
No - with no plans to do so	13.3%	18
Not sure	4.4%	6
Not applicable	11.9%	16

Chart: Accessing the Childcare Offer

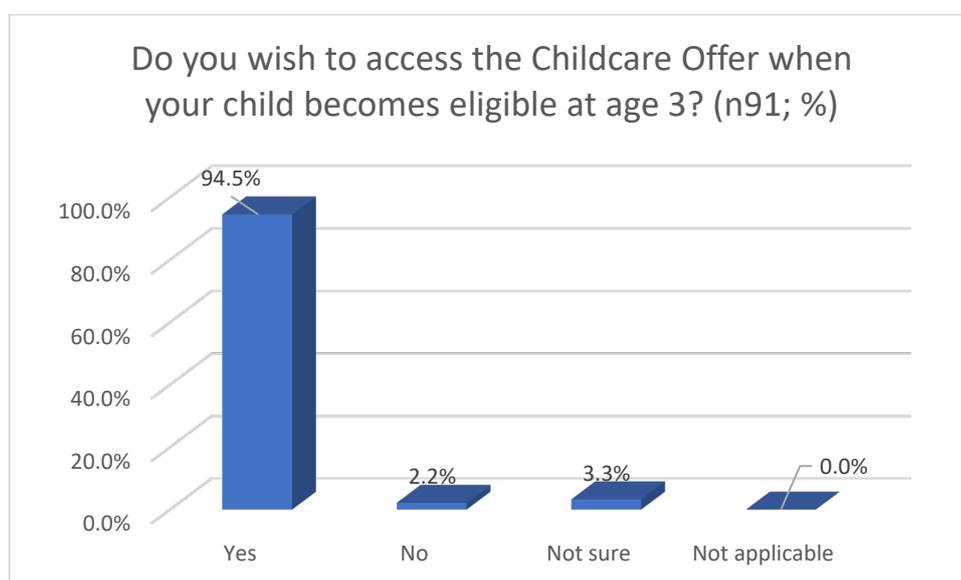


Wishing to access the Childcare Offer

Table: Wishing to access the Childcare Offer

Do you wish to access government funded childcare (the Childcare Offer) when your child becomes eligible at age 3? (n91)	%	Number
Yes	94.5%	86
No	2.2%	2
Not sure	3.3%	3
Not applicable	0%	0

Chart: Wishing to access the Childcare Offer



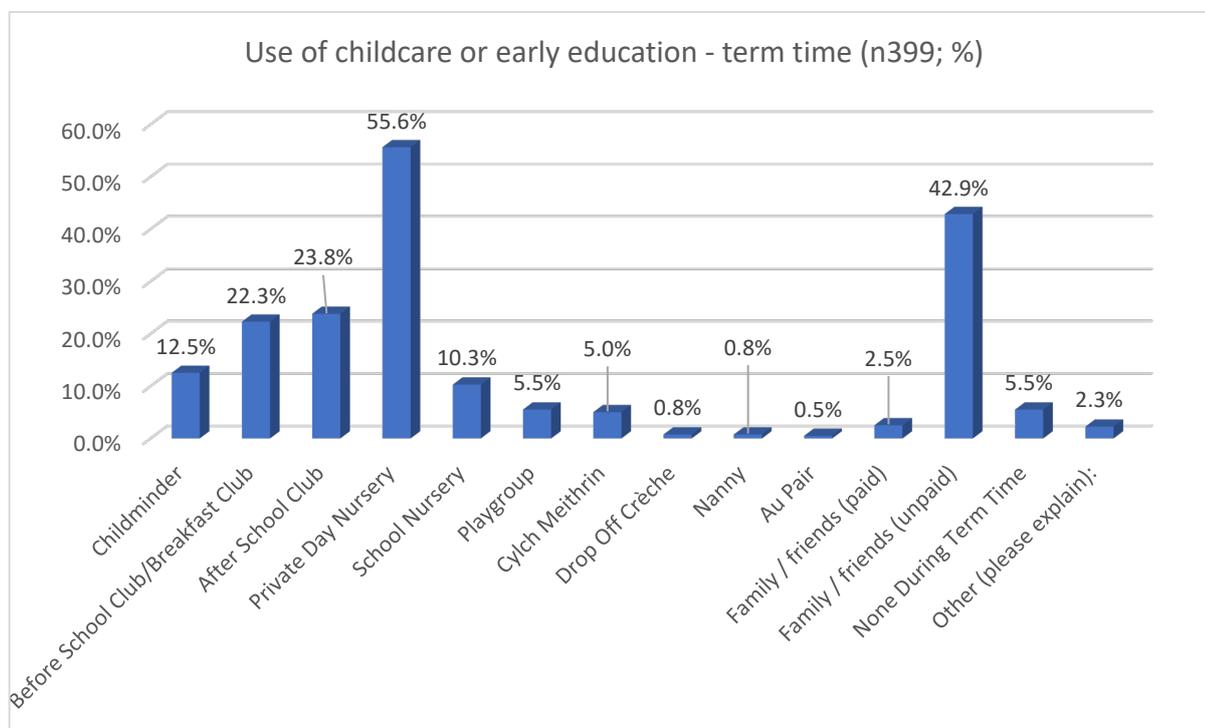
- The majority of respondents to these questions were either already accessing the Childcare Offer (60%, n81) or wishing or intending to use the Childcare Offer when their child was old enough (94.5%, n86).
- It is not clear if all respondents are fully aware of the Childcare Offer criteria, so it may be case parents have indicated they wish to use the Childcare Offer, but may not be eligible to do so

Use of childcare: term time

Table: Use of childcare: term time

Do you currently use any of the following types of childcare or early education DURING TERM TIME (Please tick all that apply)? (n399)	%	Number
Childminder	12.5%	50
Before School Club/Breakfast Club	22.3%	89
After School Club	23.8%	95
Private Day Nursery	55.6%	222
School Nursery	10.3%	41
Playgroup	5.5%	22
Cylch Meithrin	5.0%	20
Drop Off Crèche	0.8%	3
Nanny	0.8%	3
Au Pair	0.5%	2
Family / friends (paid)	2.5%	10
Family / friends (unpaid)	42.9%	171
None During Term Time	5.5%	22
Other (please explain):	2.3%	9

Chart: Use of childcare: term time



- Of the 399 responses to this question, 22 (55.6%) of respondents reported using full daycare, 89 (22.3%) using breakfast/before school care*, and 95 (23.8%) an after school club.

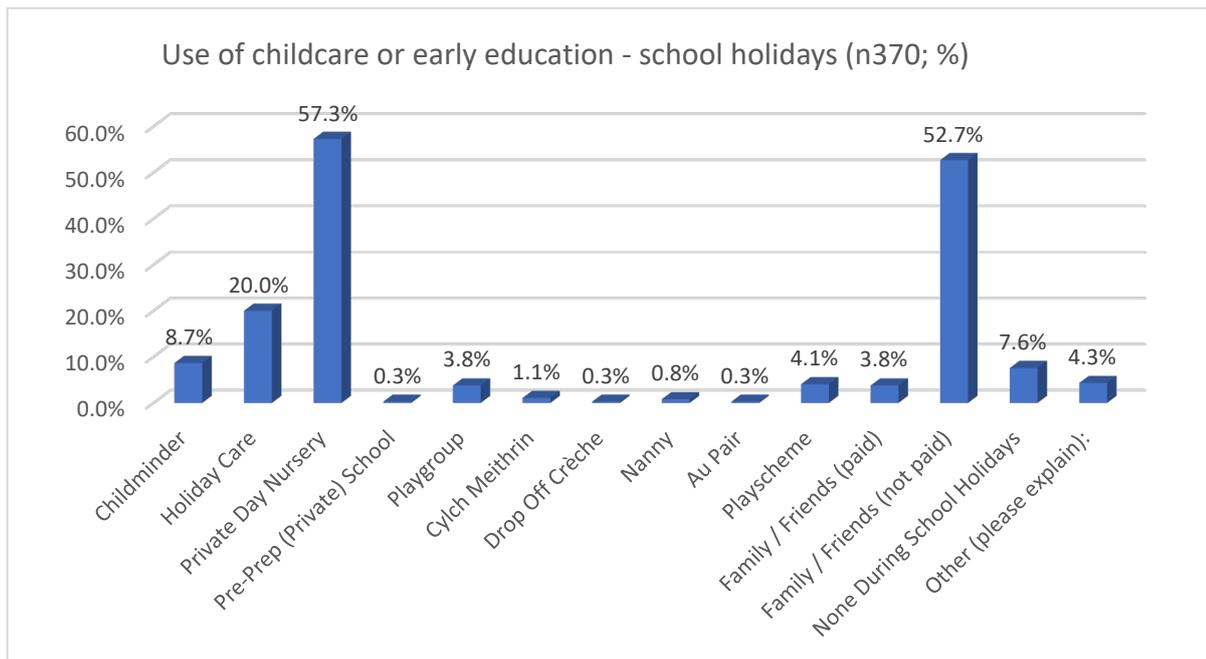
- 181 respondents reported using family and friends, with the majority (171, 42.9%) reporting there was no payment made
- *Some care must be taken when interpreting the results, as respondents may use different definitions. For example Before School Club/Breakfast Club could mean either a registered childcare setting for which fees are charged, or a free breakfast club provided by the school. Whilst both provide childcare for parents, the free breakfast club is not registered as childcare by CIW

Use of childcare: holidays

Table: Use of childcare: holidays

Do you currently use any of the following types of childcare or early education DURING SCHOOL HOLIDAYS? (Please tick all that apply): (n370)	%	Number
Childminder	8.7%	32
Holiday Care	20.0%	74
Private Day Nursery	57.3%	212
Pre-Prep (Private) School	0.3%	1
Playgroup	3.8%	14
Cylch Meithrin	1.1%	4
Drop Off Crèche	0.3%	1
Nanny	0.8%	3
Au Pair	0.3%	1
Playscheme	4.1%	15
Family / Friends (paid)	3.8%	14
Family / Friends (not paid)	52.7%	195
None During School Holidays	7.6%	28
Other (please explain):	4.3%	16

Chart: Use of childcare: holidays



- As with term time use, the largest number of respondents indicated they use full daycare during school holidays (212, 57.3%).
- 209 respondents reported using family and friends, with the majority (195, 52.7%) reporting there was no payment made. Slightly more respondents (209 compared to 181) reported using family and friends during school holidays than during term time.
- Playschemes, which do not usually operate during term time were noted in 15 responses (4.1%)
- The reported use of playgroups and Cylch Meithrin dropped from 5.5% and 5% to 3.8% and 1.1% respectively, reflecting that most provision of this type is term time only.
- The use of childminders reduced from 50 respondents (12.5%) to 32 (8.7%), despite the fact the majority of childminders (153 of 185 SASS responses, 82.7%) operate all year round

Childcare hours used

Respondents were asked to indicate the weekly childcare hours used, with options to input a figure for ‘at least’; ‘on average’ and ‘most’ weekly hours for both term time and holidays

Table: Average weekly hours used – term time, holiday

	Term; at least	Term; average	Term; most	Holidays; at least	Holidays; average	Holidays; most
Least hours reported	0	0	0	0	0	0
Most hours reported	90	90	90	500	600	700
Mode	40	40	40	40	30	30
Average	23.5	14.4	28.1	25.7	30.2	34.4

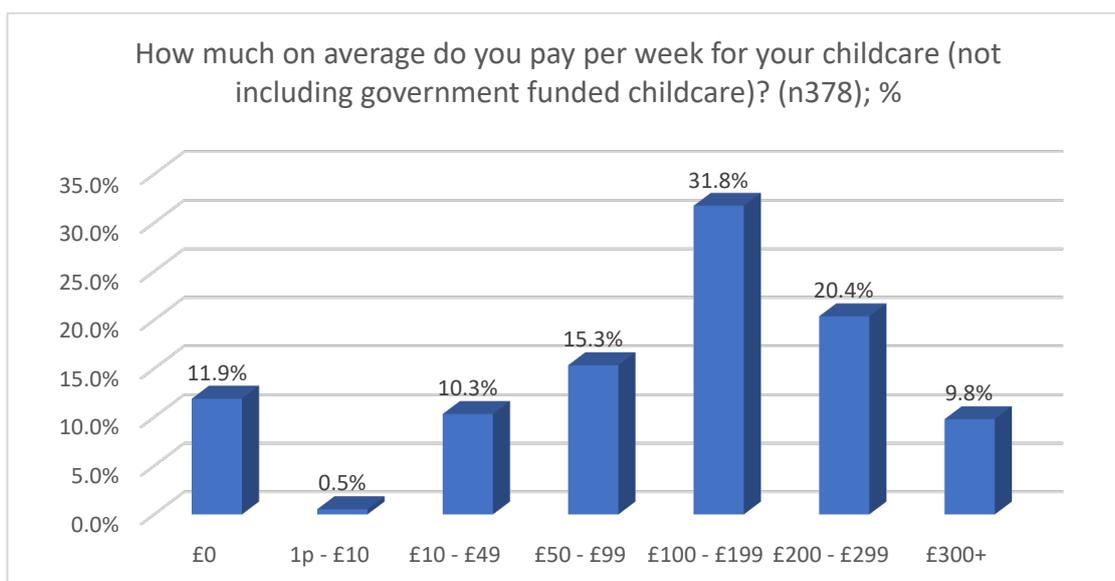
- Due to wide range of hours input as a response, both modal and average figures have been used. The modal term time use for all categories (at least, average and most) is reported to be 40 hours. However, as the majority of children attend childcare part-time, the accuracy of this data is questionable, especially for children of school age.
- Weekly holiday hours of between 500 and 700 hours per week have been recorded. This figure is far in excess of the longest weekly operating hours for any holiday provider (07.00 – 18.00 = 11 hours per day, 55 hours per week) and therefore must be seen as an error

Childcare costs

Table: How much on average do you pay per week for your childcare

How much on average do you pay per week for your childcare (not including government funded childcare)? (n378)	%	Number
£0	11.9%	45
1p - £10	0.5%	2
£10 - £49	10.3%	39
£50 - £99	15.3%	58
£100 - £199	31.8%	120
£200 - £299	20.4%	77
£300+	9.8%	37

Chart: How much on average do you pay per week for your childcare



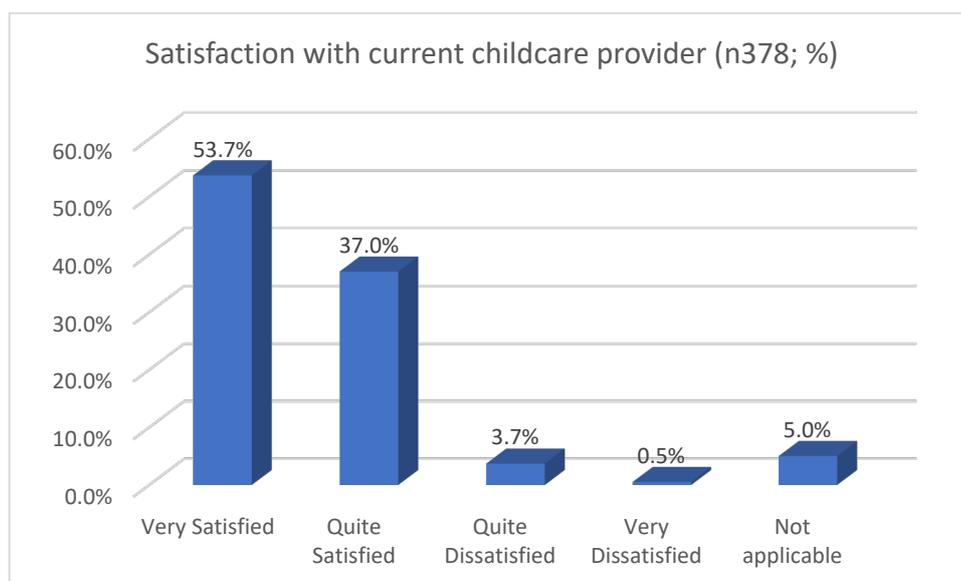
- The majority of respondents (120, 31.8%) reported paying between £100 and £200 per week for their childcare
- The modal weekly fee for full daycare (the most commonly reported provider type used) for a child of 3 year or under is £270. The figure above correlates with the data indicating most children attend childcare on a part-time basis
- For a child aged 4 to 12 years in an out of school club, weekly fees of around £40 are commonly reported. Again, data indicates most children attend out of school care on a part-time basis.
- From the above costs it is not possible to ascertain how many children a respondent has attending childcare at the same time

Satisfaction with provision

Table: satisfaction with provision (n378)

How satisfied are you with your current childcare provider? (n378)	%	Number
Very Satisfied	53.7%	203
Quite Satisfied	37.0%	140
Quite Dissatisfied	3.7%	14
Very Dissatisfied	0.5%	2
Not applicable	5.0%	19

Chart: satisfaction with provision



- Of the 378 respondents to this question, 343 (90.7%) were either 'Very satisfied' or 'Quite satisfied' with their childcare provider.
- Only 2 were 'Very dissatisfied' with their childcare provider

Childcare arrangements: Area for improvements

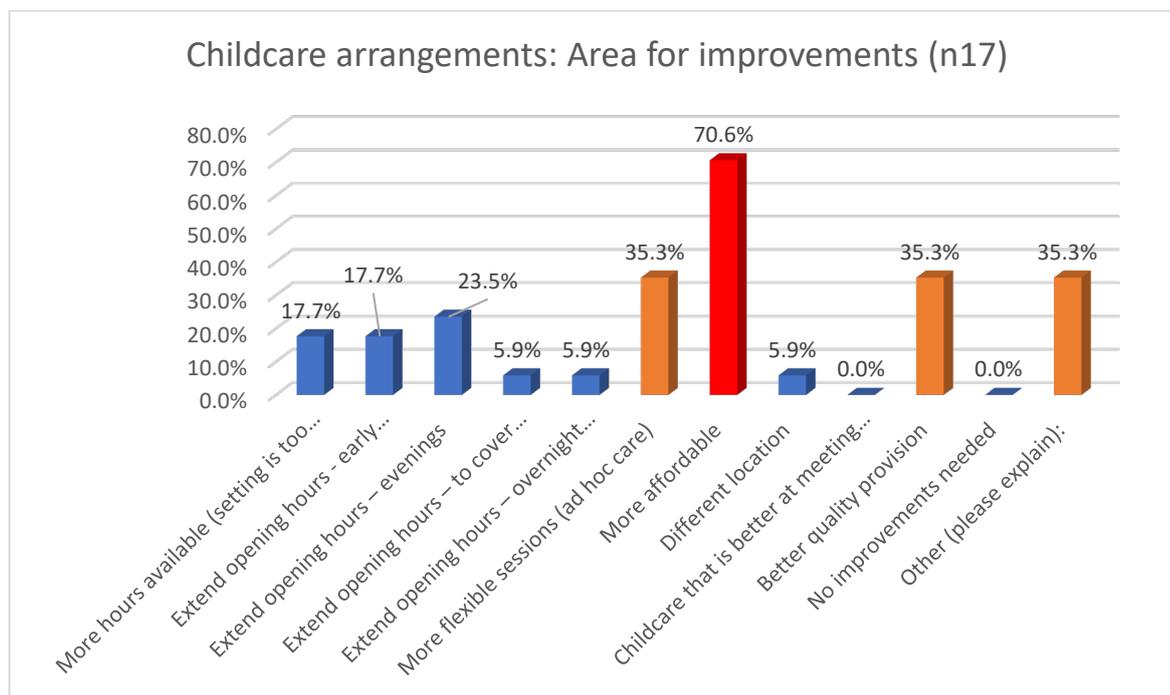
Table: Childcare arrangements: Area for improvements (n17)

NB: Please note small number of responses

If you are unhappy with a certain aspect of your childcare arrangements, please tell us how it could be improved: (n17)	%	Number
More hours available (setting is too busy /full)	17.7%	3
Extend opening hours - early mornings	17.7%	3
Extend opening hours – evenings	23.5%	4
Extend opening hours – to cover weekend	5.9%	1
Extend opening hours – overnight care	5.9%	1
More flexible sessions (ad hoc care)	35.3%	6
More affordable	70.6%	12
Different location	5.9%	1
Childcare that is better at meeting my child's additional learning needs	0.0%	0
Better quality provision	35.3%	6
No improvements needed	0.0%	0
Other (please explain):	35.3%	6

Chart: Table: Childcare arrangements: Area for improvements (n17)

NB: Please note small number of responses



- As only 17 responses were received to this question the results cannot be seen to be statistically significant
- Affordability was most often identified as an area for improvement (12,70.6%), with greater flexibility around ad hoc sessions, quality, and 'other' occurring 6 times each (35.3%)
- The Other category contained comments including;
 - "Find them unreliable, send the child home sick regularly"
 - "Less strict rules around PCR tests / covid, recognising that children under 4 will get coughs and colds"
 - Better tailor experience to my individual child

Parental opinion questions: Likert scale

The survey asked respondents opinions on a number of statements. Results are set out below.

Table: I am satisfied with my childcare in term time (n401)

I am satisfied with my childcare in term time (n401)	%	Number
Strongly Agree	40.9%	164
Tend to Agree	41.1%	165
Tend to Disagree	7.5%	30
Strongly Disagree	1.7%	7
N/A	8.7%	35

Chart: I am satisfied with my childcare in term time (n401)

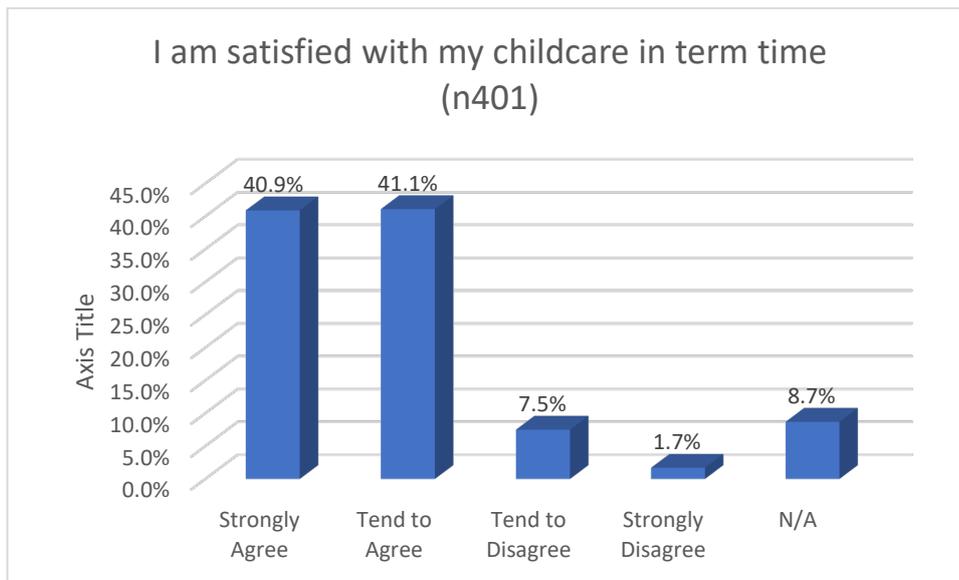


Table: I am satisfied with my childcare in school holidays (n401)

I am satisfied with my childcare in school holidays (n401)	%	Number
Strongly Agree	45.9%	183
Tend to Agree	39.1%	156
Tend to Disagree	5.5%	22
Strongly Disagree	1.5%	6
N/A	8.0%	32

Chart: I am satisfied with my childcare in school holidays (n401)

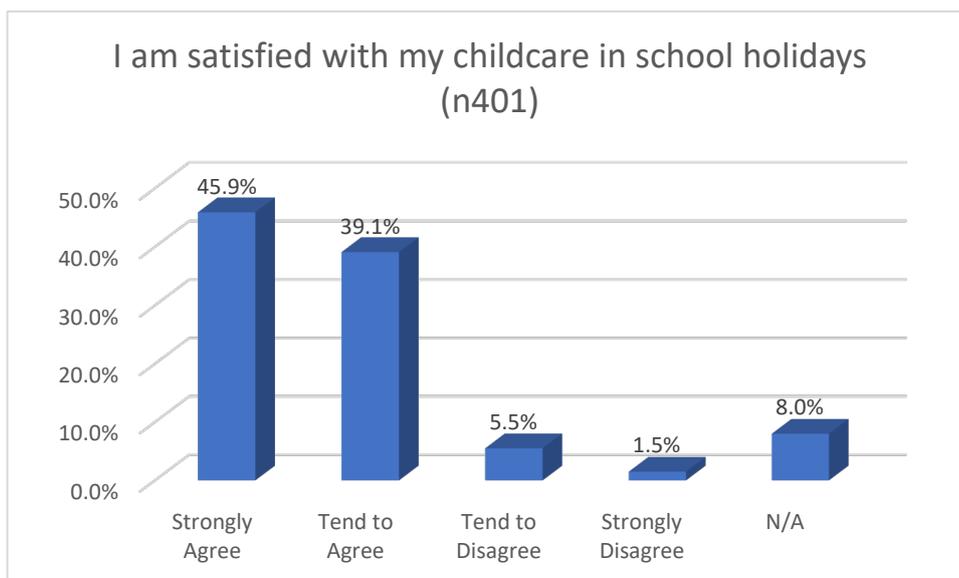


Table: There is a good choice of childcare in my area (n400)

There is a good choice of childcare in my area (n400)	%	Number
Strongly Agree	15.3%	61
Tend to Agree	35.8%	143
Tend to Disagree	29.3%	117
Strongly Disagree	14.3%	57
N/A	5.5%	22

- It is not clear whether these responses refer to the availability, affordability or range of childcare, or the respondent's knowledge of sources of information regarding childcare e.g., Cardiff Family Advice and Support, Dewis, FIS. Wales, etc.

Chart: There is a good choice of childcare in my area (n400)

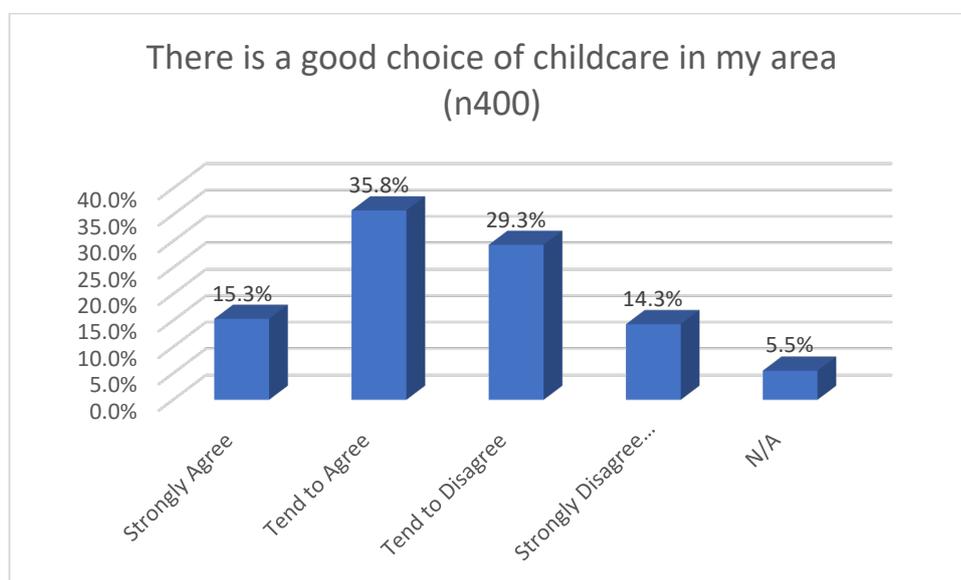
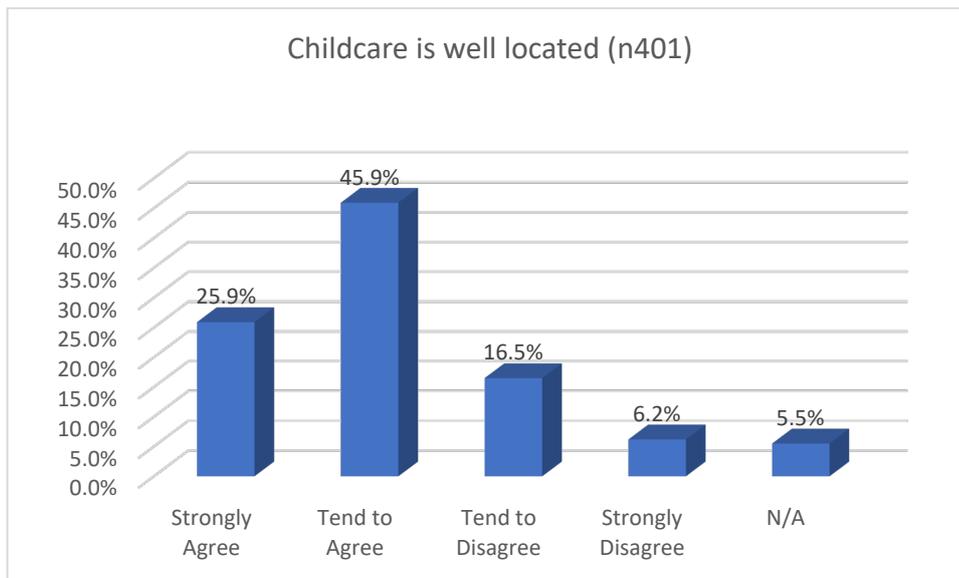


Table: Childcare is well located (n401)

Childcare is well located (n401)	%	Number
Strongly Agree	25.9%	104
Tend to Agree	45.9%	184
Tend to Disagree	16.5%	66
Strongly Disagree	6.2%	25
N/A	5.5%	22

Chart: Childcare is well located (n401)



- It is not clear if these responses reflect the views of respondents regarding location in terms of accessibility or convenience for the parent/carer or relates to the parent/carer’s view of the suitability of premises the childcare is delivered from.

Table: Childcare caters for my children’s needs (n399)

Childcare caters for my children’s needs (n399)	%	Number
Strongly Agree	21.1%	83
Tend to Agree	27.2%	107
Tend to Disagree	17.3%	68
Strongly Disagree	7.6%	30
N/A	26.9%	106

Chart: Childcare caters for my children’s needs (n399)

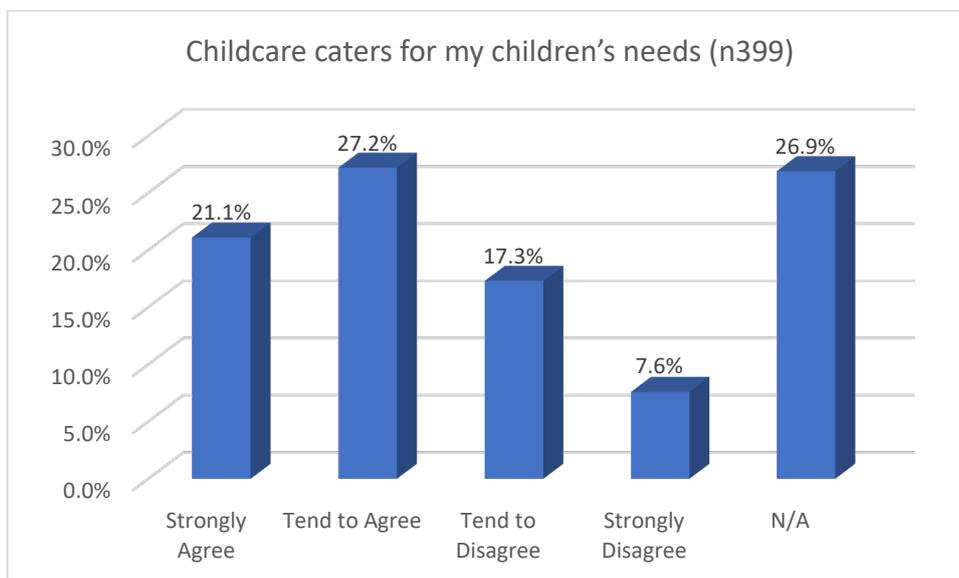


Table: I would like my child to attend more registered childcare (n394)

I would like my child to attend more registered childcare (n394)	%	Number
Strongly Agree	21.1%	83
Tend to Agree	27.2%	107
Tend to Disagree	17.3%	68
Strongly Disagree	7.6%	30
N/A	26.9%	106

Chart: I would like my child to attend more registered childcare (n394)

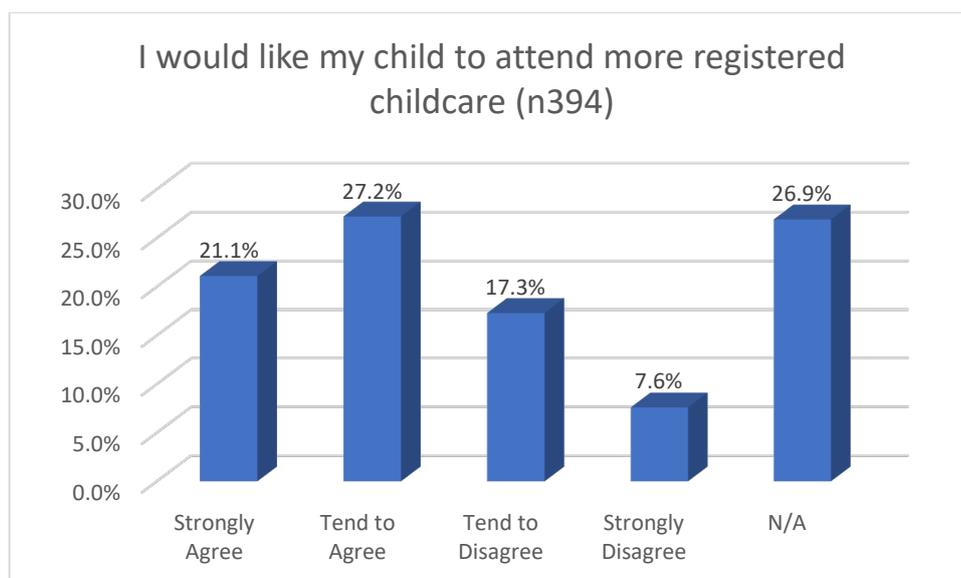


Table: Childcare is too expensive (n403)

Childcare is too expensive (n403)	%	Number
Strongly Agree	74.2%	299
Tend to Agree	18.9%	76
Tend to Disagree	3.5%	14
Strongly Disagree	1.0%	4
N/A	2.5%	10

Chart: Childcare is too expensive (n403)

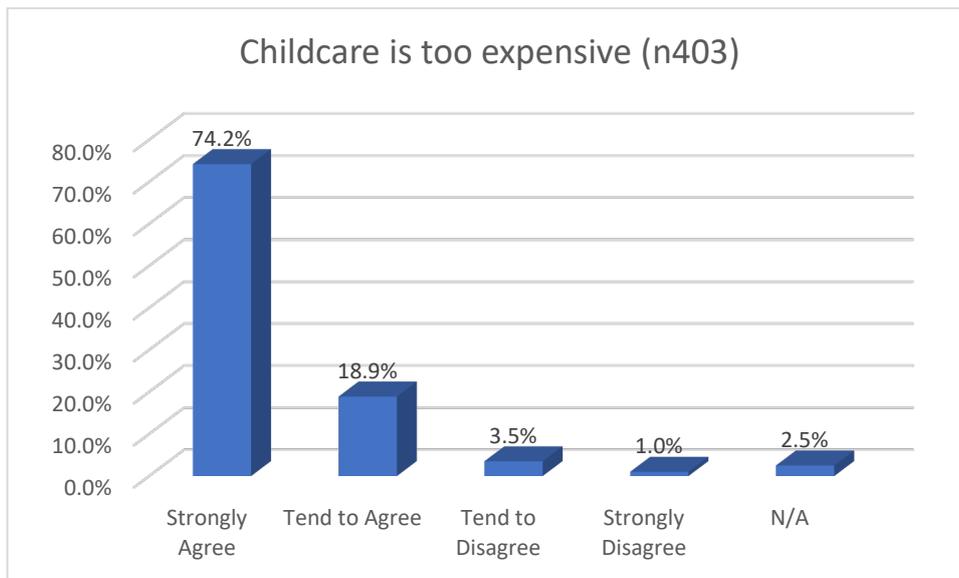


Table: I would prefer to use family/friends for childcare (n394)

I would prefer to use family/friends for childcare (n394)	%	Number
Strongly Agree	10.4%	41
Tend to Agree	22.1%	87
Tend to Disagree	35.3%	139
Strongly Disagree	15.7%	62
N/A	16.5%	65

Chart: I would prefer to use family/friends for childcare (n394)

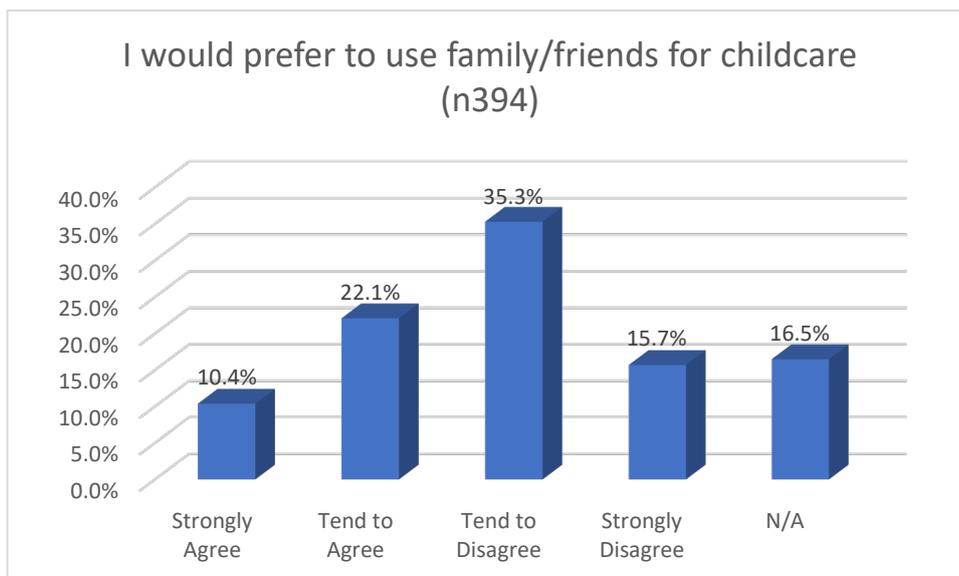


Table: I have a problem with childcare arrangements that are unreliable (eg. cancel sessions at short notice) (n397)

I have a problem with childcare arrangements that are unreliable (eg. cancel sessions at short notice) (n397)	%	Number
Strongly Agree	6.8%	27
Tend to Agree	8.1%	32
Tend to Disagree	20.9%	83
Strongly Disagree	35.0%	139
N/A	29.2%	116

Chart: I have a problem with childcare arrangements that are unreliable (eg. cancel sessions at short notice) (n397)

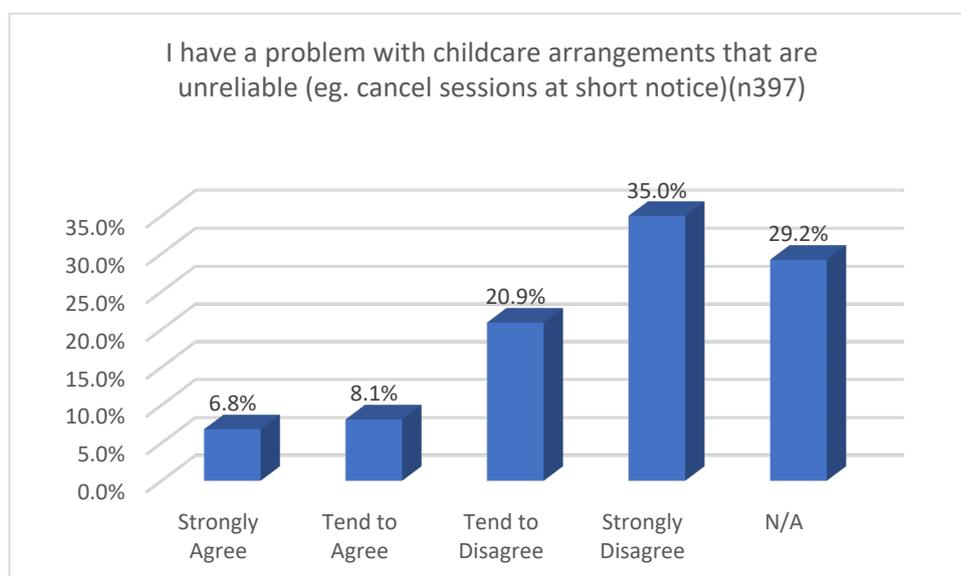


Table: Childcare is a barrier to me accessing employment or training (n396)

Childcare is a barrier to me accessing employment or training (n396)	%	Number
Strongly Agree	19.4%	77
Tend to Agree	20.2%	80
Tend to Disagree	23.7%	94
Strongly Disagree	14.4%	57
N/A	22.2%	88

Chart: Childcare is a barrier to me accessing employment or training (n396)

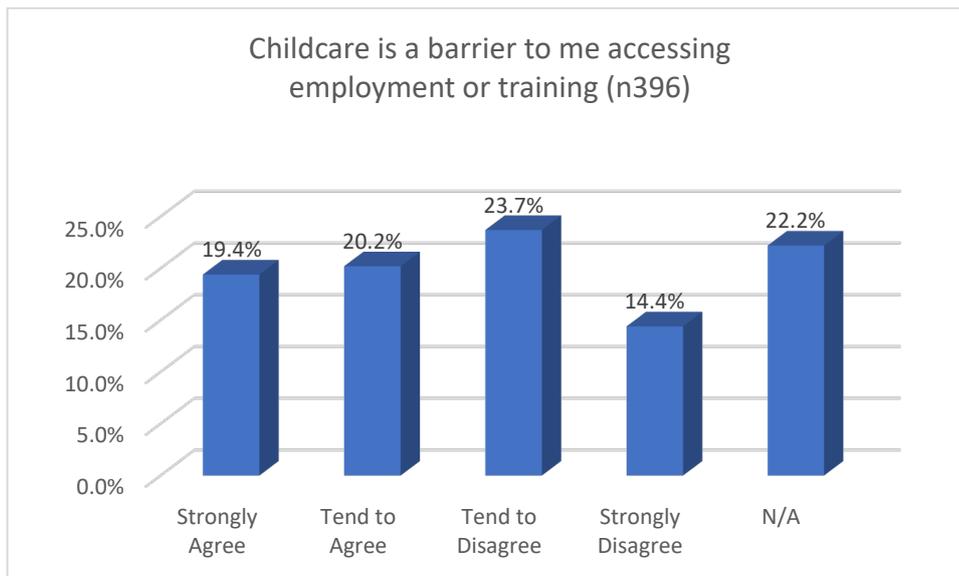


Table: I know where to find out information about childcare (n402)

I know where to find out information about childcare (n402)	%	Number
Strongly Agree	16.9%	68
Tend to Agree	45.5%	183
Tend to Disagree	22.6%	91
Strongly Disagree	9.0%	36
N/A	6.0%	24

Chart: I know where to find out information about childcare (n402)

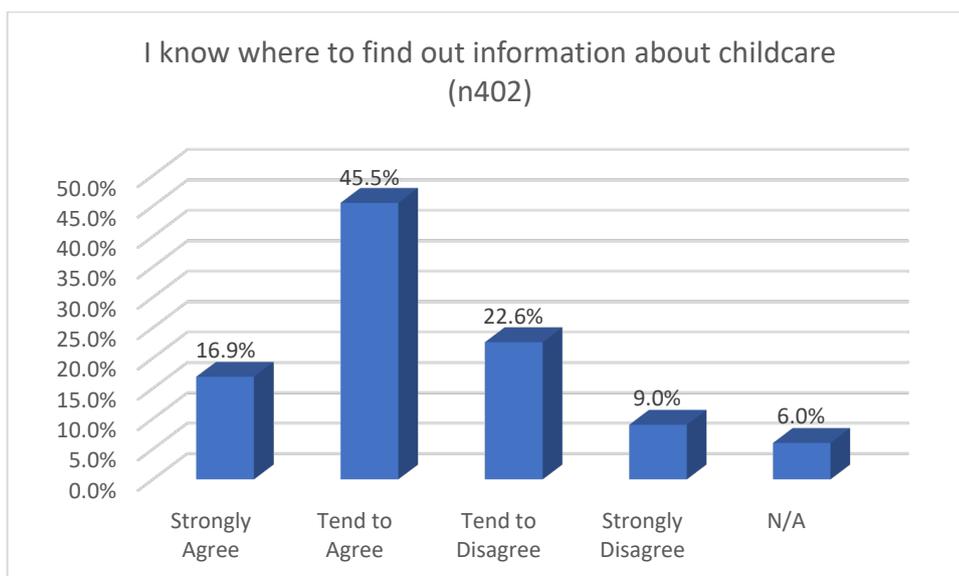
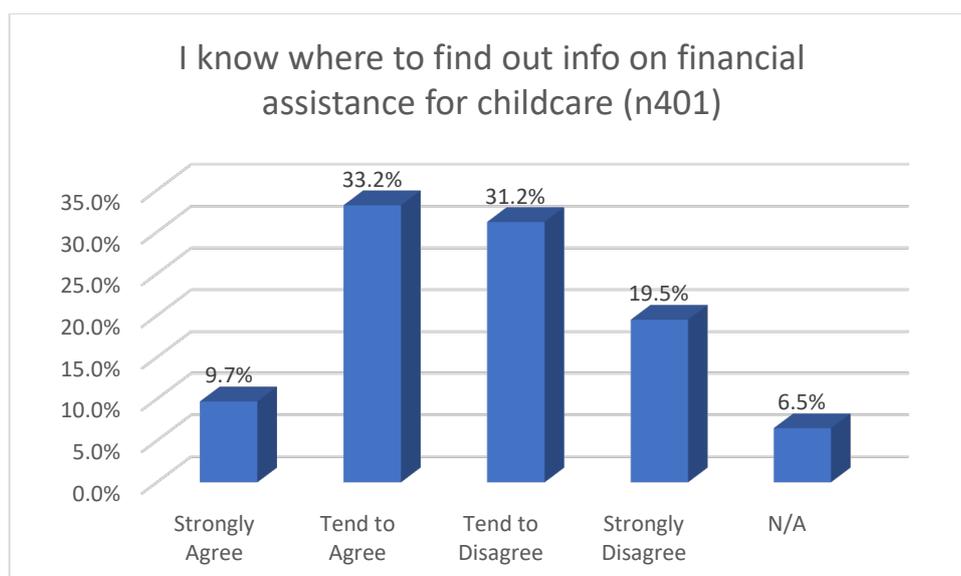


Table: I know where to find out information on financial assistance for childcare (n401)

I know where to find out info on financial assistance for childcare (n401)	%	Number
Strongly Agree	9.7%	39
Tend to Agree	33.2%	133
Tend to Disagree	31.2%	125
Strongly Disagree	19.5%	78
N/A	6.5%	26

Chart: I know where to find out information on financial assistance for childcare (n401)

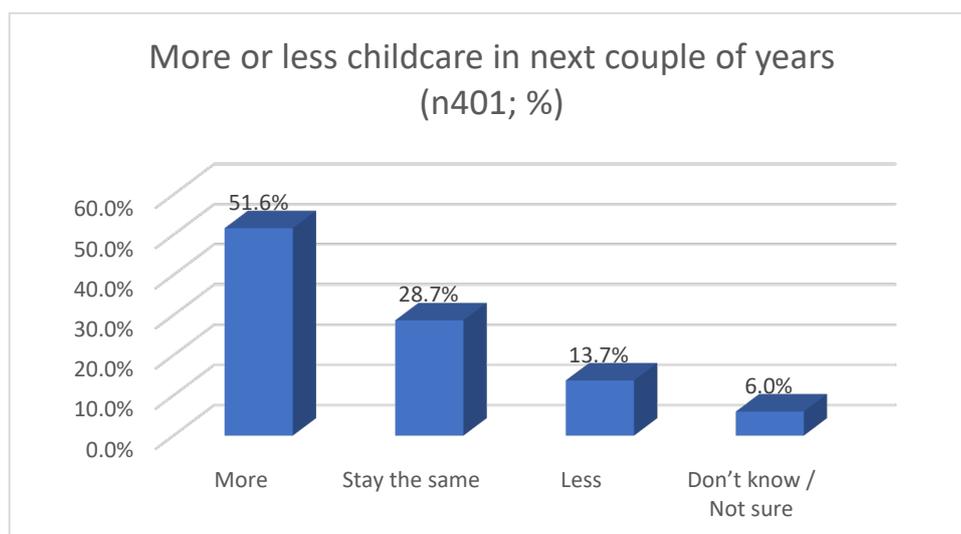


Future use of childcare

Table: More of less childcare in the next couple of years (n401)

More or less childcare in the next couple of years? (n401)		
More	51.6%	207
Stay the same	28.7%	115
Less	13.7%	55
Don't know / Not sure	6.0%	24

Chart: More of less childcare in the next couple of years

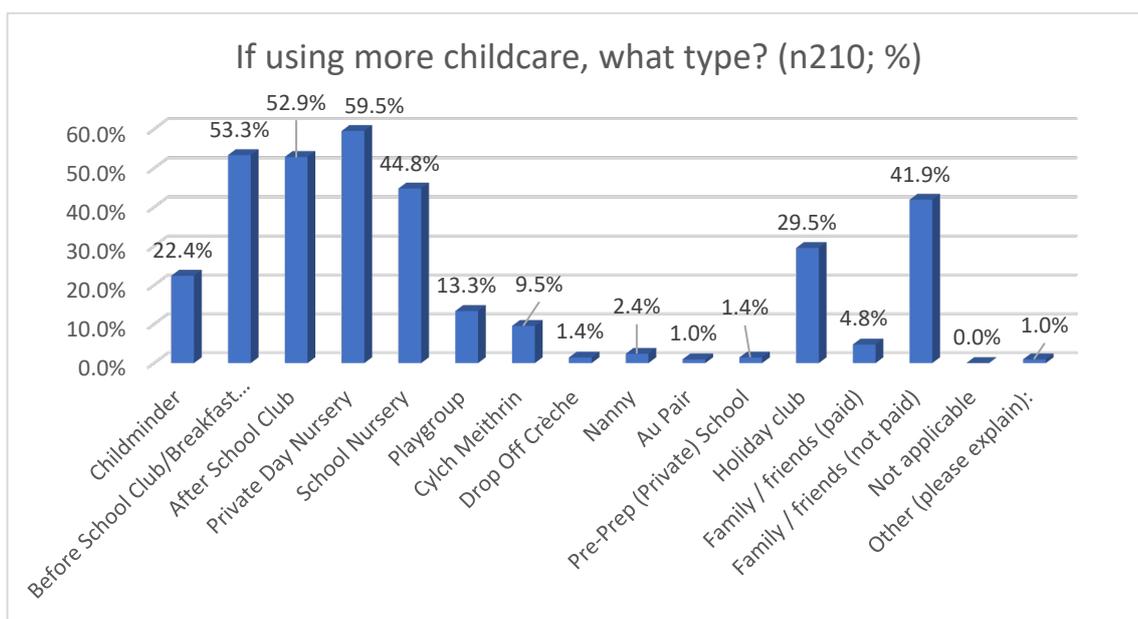


If using more childcare, what type?

Table: If using more childcare, what type? (n210; %)

If using more childcare, what type? (n210; %)	%	Number
Childminder	22.4%	47
Before School Club/Breakfast Club	53.3%	112
After School Club	52.9%	111
Private Day Nursery	59.5%	125
School Nursery	44.8%	94
Playgroup	13.3%	28
Cylch Meithrin	9.5%	20
Drop Off Crèche	1.4%	3
Nanny	2.4%	5
Au Pair	1.0%	2
Pre-Prep (Private) School	1.4%	3
Holiday club	29.5%	62
Family / friends (paid)	4.8%	10
Family / friends (not paid)	41.9%	88
Not applicable	0.0%	0
Other (please explain):	1.0%	2

Chart: If using more childcare, what type? (n210; %)



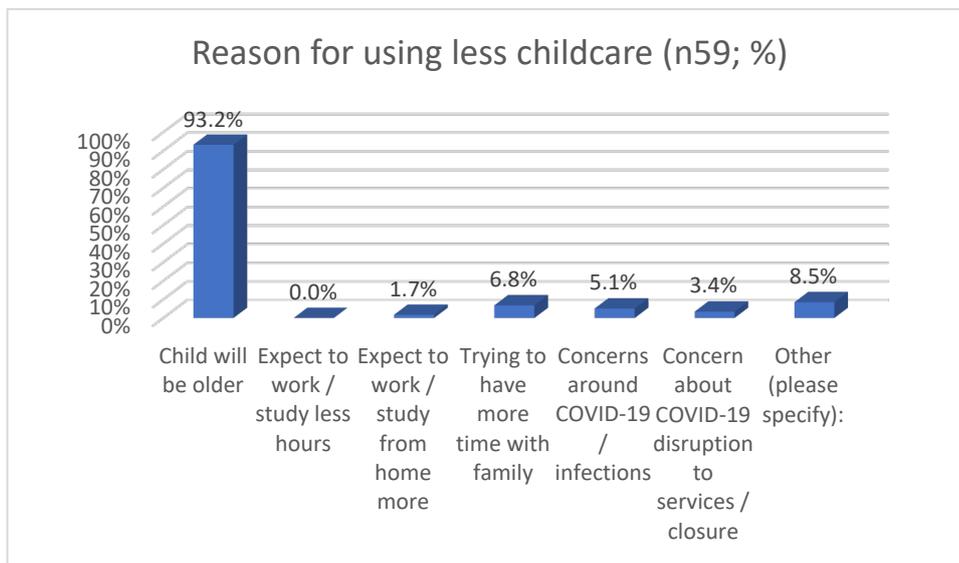
- Over half of respondents (207 of 401, 51.6%) indicated they would be using more childcare in the next couple of years. It is not clear if these responses are from parents who currently use childcare and will be looking to increase the hours they use, or if they are families who will be using childcare for the first time. 94 respondents indicated the childcare they would use would be a school nursery.
- 170 respondents (42.4%) indicated they would be using the same amount, or less, childcare in the next few years
- Of these who indicated they would be using more childcare, 98 respondents indicated they would be using friends and family, either paid or unpaid
- Of the respondents indicating they will use more registered childcare, the largest number (125, 59.5%) indicated this would be a private day nursery (full daycare). Data indicated that there are (1,371 vacancies – 302 children waiting) = 1,069 full daycare; (1,266 vacancies – 711 waiting) = 1,195 half day AM and (1,043 vacancies - 421 children waiting) = 622 half day PM net vacancies across the city
- Before school (112,53.3%) and after school (111, 52.9%) were the next largest categories. There are (1,117 vacancies – 46 children waiting) = 1,071 breakfast and (947 vacancies – 310 children waiting) = 637 after school vacancies in out of school provision across Cardiff. There are also net vacancies with childminders for over 290 before school and over 250 after school places. NB: As noted , further investigation is required to ascertain if out of school waiting list data is robust.

Reasons for using less childcare

Table: Reasons for using less childcare (n59)

Reason for using less childcare (n59; %)	%	Number
Child will be older	93.2%	55
Expect to work / study less hours	0.0%	0
Expect to work / study from home more	1.7%	1
Trying to have more time with family	6.8%	4
Concerns around COVID-19 / infections	5.1%	3
Concern about COVID-19 disruption to services / closure	3.4%	2
Other (please specify):	8.5%	5

Chart: Reasons for using less childcare



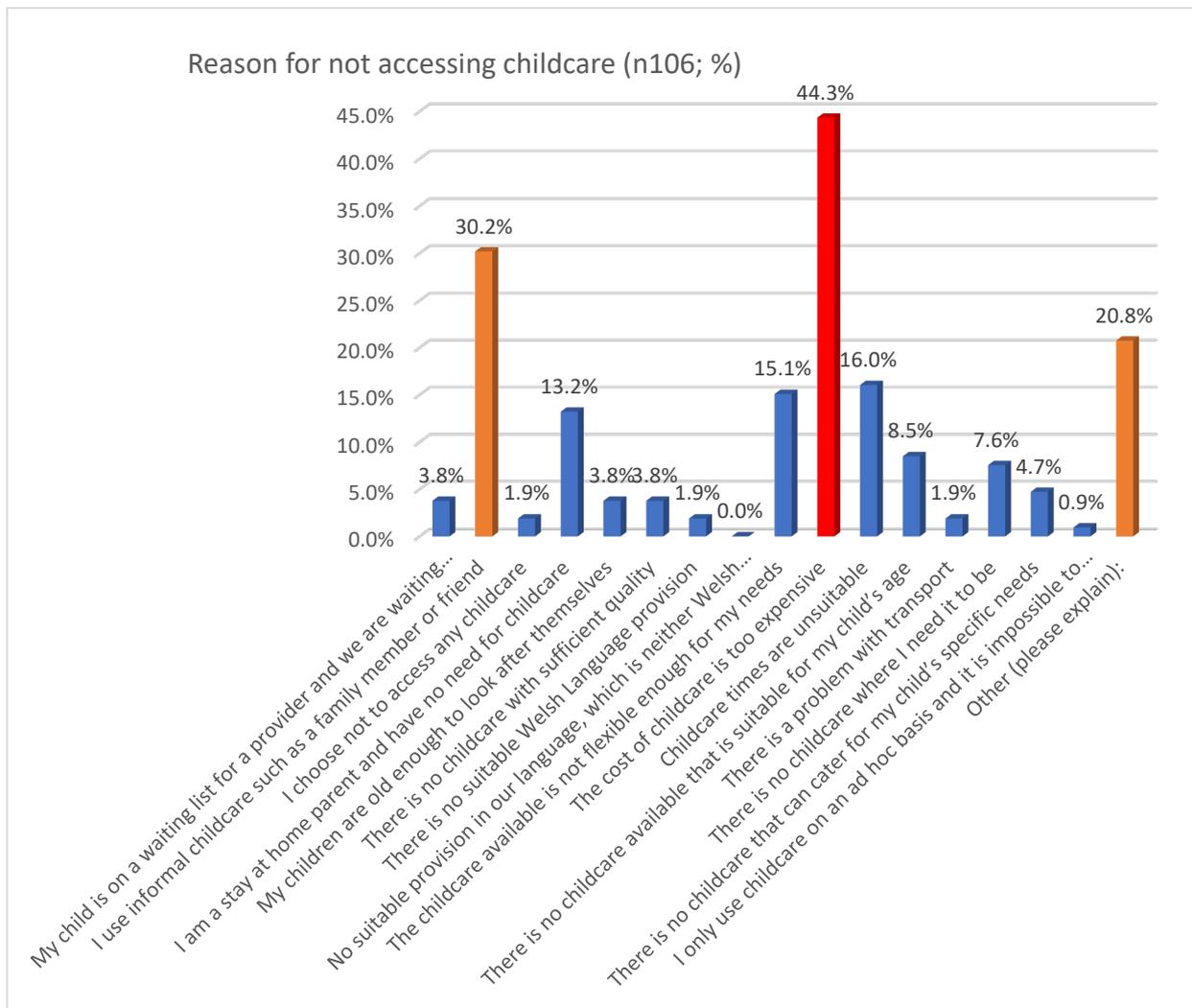
- 93.2% (55) respondents noted they would be using less childcare as their child would be older. This may mean they begin their Foundation Phase Nursery part-time, move into full time education, or reach an age when parents do not feel they need to use childcare.

Reasons for not accessing childcare

Table: Reasons for not accessing childcare (n106)

If you do not access any childcare, please tick the reason(s) why: (n106)	%	Number
My child is on a waiting list for a provider and we are waiting for a place to become available	3.8%	4
I use informal childcare such as a family member or friend	30.2%	32
I choose not to access any childcare	1.9%	2
I am a stay at home parent and have no need for childcare	13.2%	14
My children are old enough to look after themselves	3.8%	4
There is no childcare with sufficient quality	3.8%	4
There is no suitable Welsh Language provision	1.9%	2
No suitable provision in our language, which is neither Welsh nor English	0.0%	0
The childcare available is not flexible enough for my needs	15.1%	16
The cost of childcare is too expensive	44.3%	47
Childcare times are unsuitable	16.0%	17
There is no childcare available that is suitable for my child's age	8.5%	9
There is a problem with transport	1.9%	2
There is no childcare where I need it to be	7.6%	8
There is no childcare that can cater for my child's specific needs	4.7%	5
I only use childcare on an ad hoc basis and it is impossible to plan	0.9%	1
Other (please explain):	20.8%	22

Chart: Reasons for not accessing childcare (n106)



- The cost of childcare, and use of friends of family are the most commonly reported reasons for not using childcare (47,44.3% and 32,30.2%)
- The third most common category, Other, contained responses including;
 - *"I am on maternity leave"*
 - *"I can not afford to pay for childcare. If I did, any money I earn would go on childcare and more."*
 - *"During the start of Covid no childcare or support was available"*
 - *"Waiting for afterschool club to become available"*

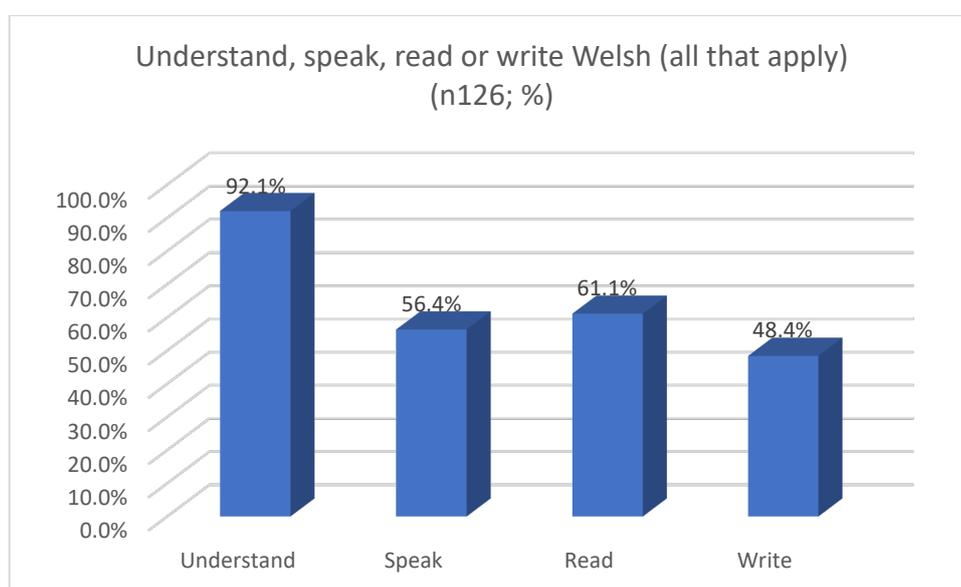
Welsh medium childcare

Use of Welsh language

Table: use of Welsh language (n126)

Can you understand, speak, read or write Welsh? Please tick all that apply (n126; %)	%	Number
Understand	92.1%	116
Speak	56.4%	71
Read	61.1%	77
Write	48.4%	61

Chart: use of Welsh language (n126)



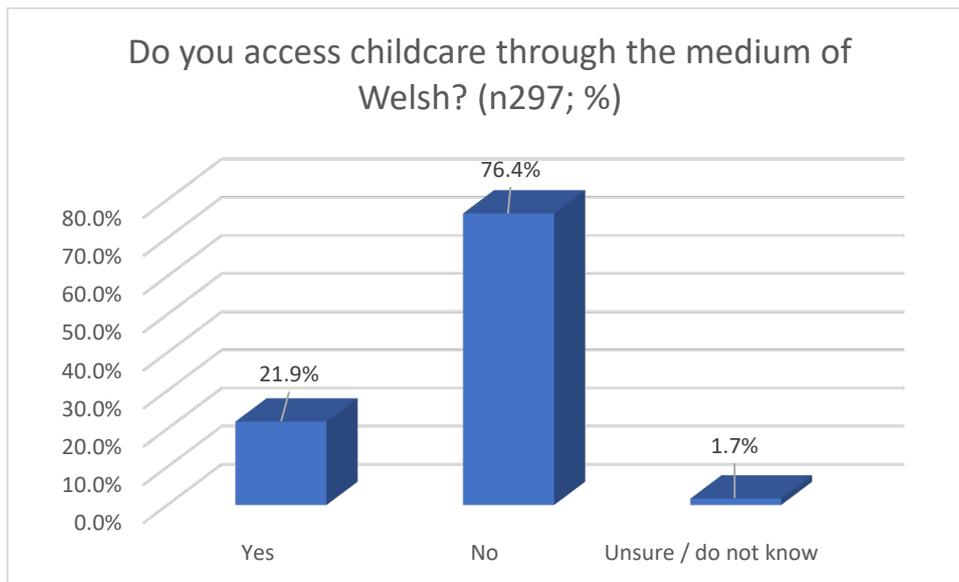
- 126 respondents answered this question. This represents 31% of all responses received.
- This is nearly double the rate of Welsh speakers in the general Cardiff population identified in the 2011 Census which reported that 16.2% of the population of Cardiff have one or more skills in the Welsh language (ability to read, write or/and understand Welsh), and 36,735 or 11.1% of the county's population are Welsh speakers.

Use of Welsh medium childcare (n297)

Table: use of Welsh medium childcare (n297)

Do you access childcare through the medium of Welsh? (n297)	%	Number
Yes	21.9%	65
No	76.4%	227
Unsure / do not know	1.7%	5

Chart: use of Welsh medium childcare (n297)

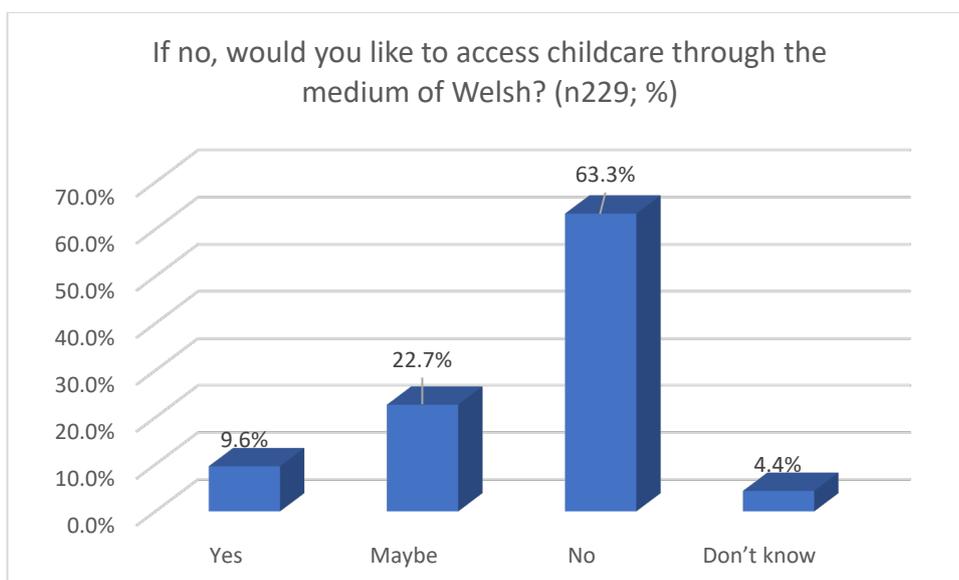


- This is higher than the proportion of Welsh medium settings (26 of the 353, 7.4%) or of registered places (863 of the 9,002, 9.6%), indicating that families using Welsh medium childcare were more likely to complete this section of the survey than for respondents as whole.

Table: Like to access Welsh medium childcare (n229)

If no, would you like to access childcare through the medium of Welsh? (n229)	%	Number
Yes	9.6%	22
Maybe	22.7%	52
No	63.3%	145
Don't know	4.4%	10

Chart: Like to access Welsh medium childcare (n229)



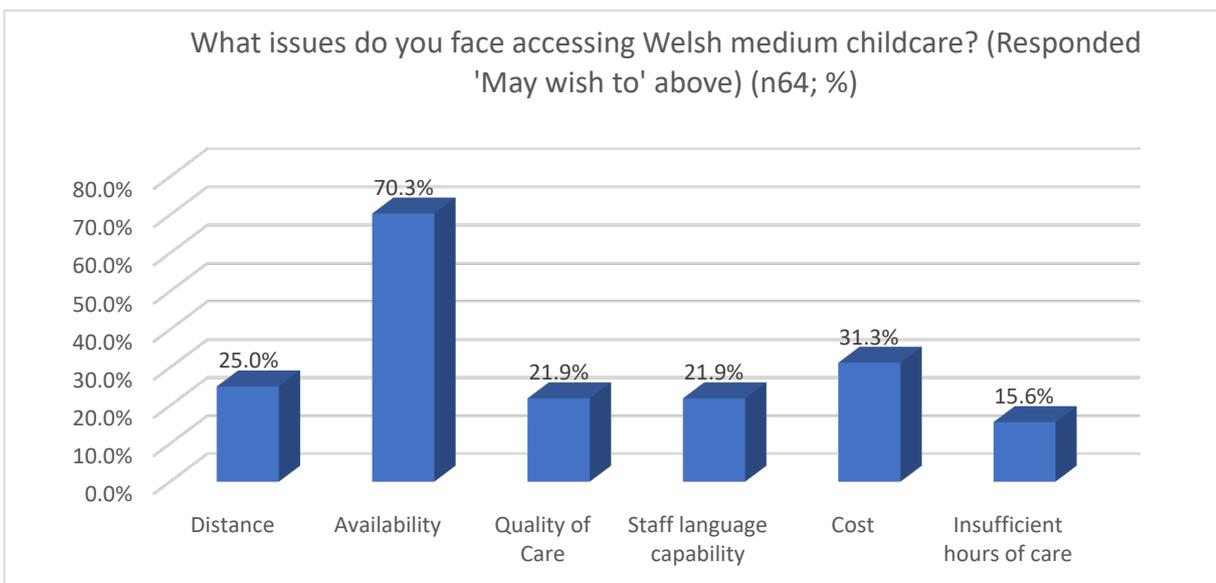
- 65 (21.9%) of the 297 respondents reported they were accessing Welsh medium childcare currently, and 74 respondents indicated they would (22, 9.6%) or might (52, 22.7%) access Welsh medium childcare in future.

Issues faced accessing Welsh medium childcare

Table: Issues faced accessing Welsh medium childcare

What issues do you face accessing Welsh medium childcare? (Responded may wish to above) (n64; %)	%	Number
Distance	25.0%	16
Availability	70.3%	45
Quality of Care	21.9%	14
Staff language capability	21.9%	14
Cost	31.3%	20
Insufficient hours of care	15.6%	10

Chart: Issues faced accessing Welsh medium childcare



- Availability was the most commonly reported issue (45, 70.3%).
- Comments received included:
 - *School after school club has a very long waiting list*
 - *No welsh medium nursery which provides wrap around for the school they go to (welsh medium school) foe the hours I work*
 - *My children used to go to a Welsh speaking childminder but she could not have them when they started school as she does a school run to a different school*
 - *We are first language Welsh and speak Welsh at home but don't have access to a Welsh medium nursery*

8.3. Barriers to Childcare Provision

Caveat: Where comments from the parent survey have been used, it must be recognised these are the views and experiences of the individual respondent and are not necessarily representative of the parent/carer population of Cardiff as whole.

Comments have been used as received and may contain spelling or typographical errors.

The responses do not seek to challenge or undermine the validity of the views expressed but seek to present data or possible means by which the issues raised could be improved or addressed.

(a) the accessibility of childcare provision.

The following comments were received via the parent survey:

- *Not enough childminders*
- *Very little childcare providers in the area, especially if planning ahead and will need wraparound care for school nursery when child aged 3. I feel that there is little support for working parents especially those who still need to travel to a workplace rather than have the option to work from home. I have had to recently turn down additional days work because I cannot make suitable childcare arrangements.*
- *Yes, there is a huge shortage of childcare in my local area. When my son starts primary school next year, I'm unable to find anyone (childminder or private day nursery) who will be able to provide wrap around childcare. I feel really stressed out about this as may mean I have to reduce my working hours again or give up my job. I'm a post grad qualified professional so don't want to give up my career or have to drop my working hours again. I currently work on 0.75 contract due to issues with availability of childcare.*
- *Lack of variety of providers, had to choose a very expensive provider that was near my husband's workplace. Nothing locally.*
- *There's no holiday club available at the school our child attends*
- *First of all it is just difficult to locate online the official website where to look for childcare. Then you have to look after a childcare which can do wrap around school and according to your working needs*

Response

The tables below show the number of providers and places, based on SASS and CIW data

Table: Registered settings and places; SASS, CIW, by provider type

	Settings		Places	
	SASS	CIW 07.06.2021	SASS	CIW 07.06.2021
Full daycare	83	87	4005	4,181
Sessional	39	43	1073	1,169
Out of school	44	50	2272	2,452
Childminders	185	234	1557	1,920
Open Access Play	1	1	75	75
Creche	1	2	20	30
Total	353	417	9002	9827

Whilst some settings have reported waiting lists for specific services, this may be due to children being on a waiting list for one setting, whilst attending another. As set out below, based on a comparison of waiting lists and vacancies broken down by service and NPA, a total of 99 children were reported as being on a waiting list where no capacity exists for within that service in the NPA.

- Cardiff North – 21 children waiting for Morning, 10 children waiting for playscheme session, 2 for Playgroup/Cylch Meithrin AM (NB: vacancies exist for Playgroup/Cylch Meithrin PM)
- Cardiff East - No children waiting for any service
- Cardiff South East - No children waiting for any service
- City and Cardiff South – 3 children waiting for Half Day Care/Half Day Nursery PM (NB: 527 Half Day Care/Half Day Nursery AM vacancies). 6 children waiting for Playgroup/Cylch Meithrin AM place
- Cardiff South West - 23 children waiting for a Half Day Care/Half Day Nursery place (NB: 36 Morning vacancies available)
- Cardiff West - Cardiff 29 children waiting for a Full Day Care/Full Day Nursery place (NB: 151 Morning vacancies exist in this NPA). 5 children waiting a Playgroup/Cylch Meithrin AM place (NB: 151 Morning vacancies reported)

(b)the barriers experienced by—

(i) working parents;

Issues identified by working parents included high costs, with 299 of 393 responses, 74.2%, agreeing with the statement “childcare is too expensive” (although it should be noted that it was not possible to identify the employment status of these respondents); the time that care is available; issues around the Childcare Offer and the “*current culture and expectation on the main carer to return to work before the child is aged 2*”

- *Very expensive nursery abs still need family to do drop off / pick up as a shift key worker I start work at 7 and don't finish until 7.30pm*
- *Cost is too much, so have to have one parent as stay at home instead of both working (as would be worse off if both worked and barely manage as is)*
- *The split element of the free 30 hrs in Wales (private/school) is almost unworkable for many employed parents. We have only one venue it is possible to use in order to take up the full provision. If my child doesn't get a nursery school place in January at the same place as his sibling we won't be able to use the school element. This really needs to be rethought.*
- *No difficulties finding childcare. There are plenty of private nurseries in the surrounding area. The issue is the current culture and expectation on the main carer to return to work before the child is aged 2 when research is beginning to evidence the emotional and behavioural impact of the stress that this separation has on our young children, and therefore the impact on their later life (behaviour and emotional stability). The pressure comes from the financial demand on the family (a family requires two pay cheques to live outside of a month to month survival status), the huge cost of childcare that makes families question the worth of an additional wage, grandparents are working later in life because of an increase in retirement age and so are not available to provide family support and the fear that taking any longer maternity leave has a major impact on the woman's ability to continue her job and be taken seriously for future promotions and growth opportunities.*

Response

The largest proportion of respondents to the question around childcare costs, not including Government funded childcare such as the Childcare Offer or Flying Start, in the parent survey indicated they were paying between £100 to £199 per week for their childcare (120 of 378, 31.75%), with a further 77 (20.37%) paying between £200 and £299 per week. Given the forthcoming increase in the National Minimum Wage and utilities costs, it is likely that childcare costs will increase in the short to medium term. Whilst, as identified in the action plan, the Childcare Business Support Team will seek to encourage more settings, especially

sessional day care, to provide Tax Free Childcare and accept childcare vouchers, the local authority has little or no influence over the costs charged by childcare providers.

(ii) parents seeking work or training opportunities;

- *We are working our hours during the week in a condensed way and swapping Fridays in work and working on Sundays just because we can't afford the extra day of childcare per week. I'm training as a psychologist and because I'm paid a bursary we cannot have access to any financial support e.g. government top up. We're both exhausted as parents and only see each other on Saturdays as between us we are having our child every Friday and working an extra weekend day as we can't afford to put him in childcare for an extra day. We're burnt out.*
- *Wasn't entitled to childcare grant as a student. The cut off for a partners wage is ridiculously low compared to the price of childcare. I had to study at home with my son as I couldn't afford to be in full time education and pay nursery fees*

Response

The recent Welsh Government research report "*Review of the childcare support available for parents in education, training or returning to work childcare support*" identified the following:

"Gaps and barriers

Despite a range of programmes and funding sources, there are still groups potentially missing out on support or inadequately supported by some schemes to the point of this being a barrier to them pursuing education, training or employment. These groups include:

- *postgraduate students*
- *healthcare students*
- *two-parent households where one is in work (although the earnings of the other parent may be low)*
- *parents with several children*
- *under-represented groups such as Black, Asian and minority ethnic communities*
- *disabled learners*
- *refugees and asylum seekers"*

The report went on to reach the following conclusions and make the following recommendations:

“The research has shown that despite the positive impact of childcare supportthere are still groups potentially missing out on the opportunity to return to education, training and employment, as well as additional challenges which create barriers for parents.

While there is a need to further explore how those missing out on financial support for childcare could be better supported, it is not recommended that the Childcare Offer should be redesigned to accommodate students and those on the cusp of employment. As an alternative, the gaps in support should be addressed by reviewing the scope of current programmes and creating better links between them.

Actions are required to reduce the complexity of childcare support schemes and eligibility requirements. The methods in which communication is made with learners should be reviewed to address promoting the package of support to these target groups and clarify the support available.”

The full report can be accessed at,

<https://gov.wales/review-childcare-support-available-parents-education-training-or-returning-work-summary-html>

PaCE (Parents Childcare and Employment)

PaCE is a joint project led by the Welsh Government in partnership with DWP and is funded by the European Social Fund (ESF). It operates in local authorities outside former Communities First clusters. The Project provides childcare support for parents whilst training or looking for work, where childcare is their main barrier. PaCE aims to support parents aged 16 to 24 not engaged in education, training or employment and economically inactive parents aged 25+.

It is not clear how Brexit and access to European funding streams, will impact on the continuation of PaCE

(iii) unemployed households;

The statutory guidance issued to local authorities regarding the CSA requires a focus on “*working parents or parents undertaking education or training,*” and asks Local Authorities to also consider “*the local needs of parents...to assist them to obtain work*”. The transition into employment and accompanying need for childcare has been identified as presenting challenges, as can be seen from the responses below:

- *There is no flying start in my area, also I cannot afford to pay for two children to go into childcare*
- *Definitely there is no governmental support for mums if they want to return to work when their child is less than 2 years. The government does not support woman in this way! Additionally, the support when a kid is between 3 & 4 years old is ridiculous. No all schools have breakfast and afternoon clubs so if both parents want to work you need to pay for private childcare. It should be more options encouraging parents to be back to work*

Response

This document is available in Welsh / Mae'r ddogfen hon ar gael yn Gymraeg

In addition to PaCE (see above), the Childcare Offer provides childcare funding for eligible parents who move into employment, which along with the child's Foundation Phase Nursery can provide up to 30 hours per week of childcare and education, with parents charged only for food and refreshments and transport costs.

For parents of 2- to 3-year-olds living in Flying Start areas, the childcare element of the programme provides 12.5 hours per week of childcare at no cost. This may help facilitate a move into employment, although it is recognised that families will be charged for any childcare hours above the Flying Start entitlement.

(iv) low income families;

- *Can't afford to work - earning potential means entire salary (plus maybe a bit more when factoring in travel costs etc) would go on childcare. It just isn't really possible now with one child, and if have future children would be completely impossible with more than one child. Desperately want to work and contribute but can't. But not entitled to any benefits as partner just above cut off for any support (in a sticky spot of not entitled to any additional benefits but not able to afford most things)*
- *Yes - difficult to find childcare that is reasonably priced. Some sessions are almost £40 per child per day.*

Response

As noted above, PaCE, Flying Start, the Childcare Offer, Tax Free Childcare, childcare vouchers and Working Tax Credit/Universal Credit childcare assistance, can all provide some assistance towards the costs of childcare.

Additionally, 42.9% (172 of 401) of respondents reported they "strongly agreed" or "tended to agree" with the statement "*I know where to find out info on financial assistance for childcare*"

Action: Work with Cardiff Family Advice and Support to improve the accessibility of information about financial assistance with childcare costs for parents/carers.

Action: work with sessional day care settings to encourage more settings to sign up to provide Tax Free Childcare and/or accept Childcare Vouchers. Only 13 (33.3%) of sessional day care providers are currently signed up, the lowest proportion of any provider type.

(v) lone parent families;

A search for the term ‘lone parent’ returned only one result from the parent survey, although 52 respondents (12.8%) noted having sole responsibility for their child or children.

- *I’ve explained in last paragraph we can’t leave work to go take them to a school far away for what you offer. You pls need to offer full time lone parents full time childcare in a private nursery like ‘childcare setting’ down bay which has long hours for working parents*

Response

The services, policies and issues identified above are all as relevant to lone parents as to two parent families. It is likely that issues regarding the cost of childcare, impact similarly or more severely on some lone parent households. With most childcare services operating in a market economy, their charges do not take into account household income.

Families from ethnic minority backgrounds;

Table: Other languages used in settings

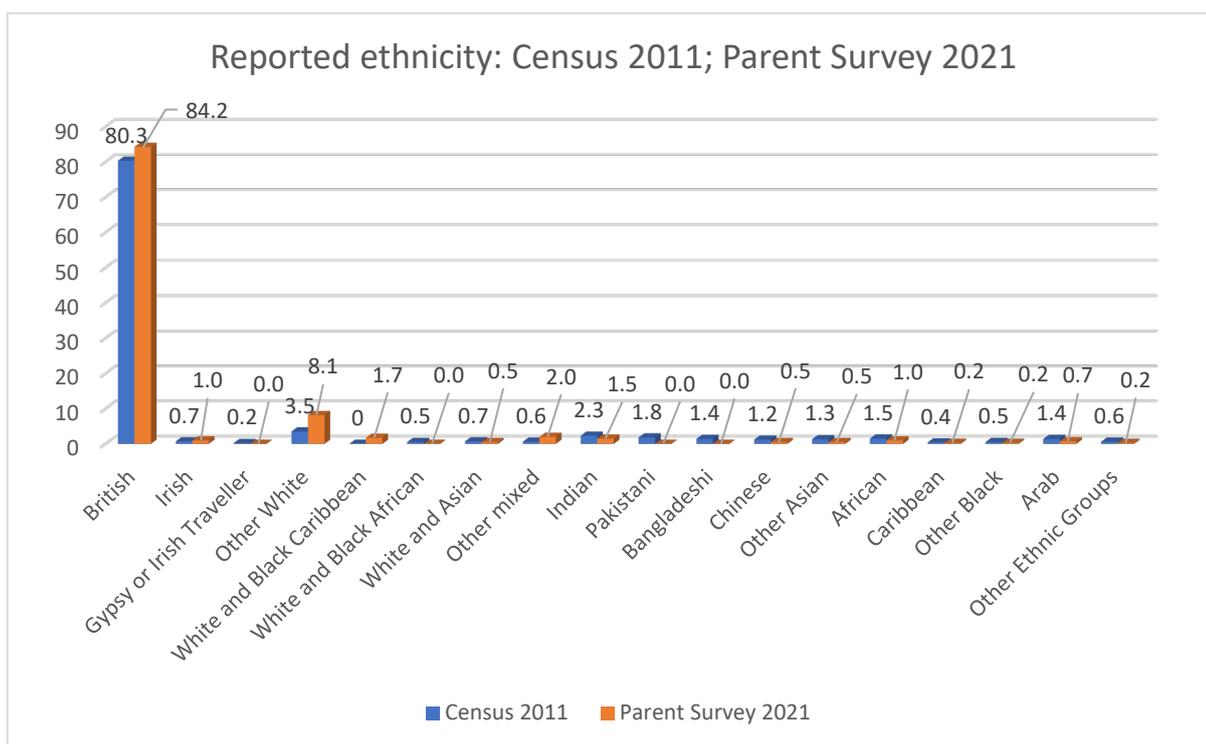
	Bengali	Chinese	French	Greek	Italian	Makaton	Portuguese	Polish	Punjabi	Spanish	Urdu
Childminders			2				1	2	1	1	1
Full daycare	1	1			2	1		2		2	
Sessional day care		1		1	1			1			1

- Ten languages other than English or Welsh were reported as being used in settings, along with Makaton.

Table: Reported ethnicity: Census 2011; Parent Survey 2021

Total Usual residents	Census 2011	Parent Survey 2021
White	84.7	93.3
British	80.3	84.2
Irish	0.7	1.0
Gypsy or Irish Traveller	0.2	0.0
Other White	3.5	8.1
Mixed Ethnicity	2.9	2.2
White and Black Caribbean	1.1.	1.7
White and Black African	0.5	0.0
White and Asian	0.7	0.5
Other mixed	0.6	2.0
Asian	8	2.5
Indian	2.3	1.5
Pakistani	1.8	0.0
Bangladeshi	1.4	0.0
Chinese	1.2	0.5
Other Asian	1.3	0.5
Black	2.4	1.5
African	1.5	1.0
Caribbean	0.4	0.2
Other Black	0.5	0.2
Other Ethnic Groups	2	1.0
Arab	1.4	0.7
Other Ethnic Groups	0.6	0.2
Total	100	100

Table: Reported ethnicity: Census 2011; Parent Survey 2021



- Parent survey respondents identifying as White are slightly over-represented when compared to Census data for the whole population (93.3% for respondents compared to 84.7% for the population as a whole)
- All other ethnic groups are under-represented in the responses, with the greatest disparity being for those identifying as Asian (2.5% of responses compared to 8% of Cardiff’s population).
- There is no information regarding the ethnicity of the childcare workforce, to be able to assess to what degree it reflects the wider community

Families with children who have special educational needs, or a disability.

The parent survey asked respondents *“Were there any special difficulties finding childcare for one or more of your children? If so, why? Please also complete this box if you have had difficulty finding childcare for a disabled child who is 18 or older?”*

A search was undertaken of all the responses for the following words or phrases:

“SEN”; “Special Educational Needs”; “disability”; “disabled”; “ALN”; “additional needs” and the following 4 responses were found:

- *Yes you don’t offer long enough hours or correct places for childcare disabled children like mine need all year round childcare and holiday clubs and they can only be used through private nurseries so pls consider giving private nurseries full time childcare offer places like darling buds in the bay which open long hours*

- *Many people are not trained for additional needs children, especially where violent behaviour is common*
- *My 2 year old has just finished chemotherapy and I am worried about costs and future childcare care for him with his additional needs.*
- *My child is disabled with complex medical needs. There is a huge lack of childcare provision/inclusive provision for children with such needs. Personal assistants are very hard to find and in short supply. They also need to be able to drive and accommodate a wheelchair in their car - some have tiny cars and so this is not always possible. Personal assistants seem to know that because they are in demand it doesn't matter if they let you down at the last minute...you're highly unlikely to get rid of them or find someone else quickly because you need them so badly. They also tend to move on from their roles very quickly. Finding childcare in summer holidays is impossible - schools offer 3 days a week for just 2 weeks. Even when you do have a personal assistant they normally have another job you have to work around. You also just don't get given enough hours to cover your needs, especially in school holidays. For example, there were 7 weeks in the last summer holiday and our allocation for a personal assistant is just 9 hours per week. My husband works full time and I work 3 days a week. Our personal assistant time therefore allows us childcare cover of 1 day and 1hr30min - when we need 3 days. We therefore have to rely on grandparents, or rotate our annual leave, meaning we are not off work together all the time or able to do nice things all together.*

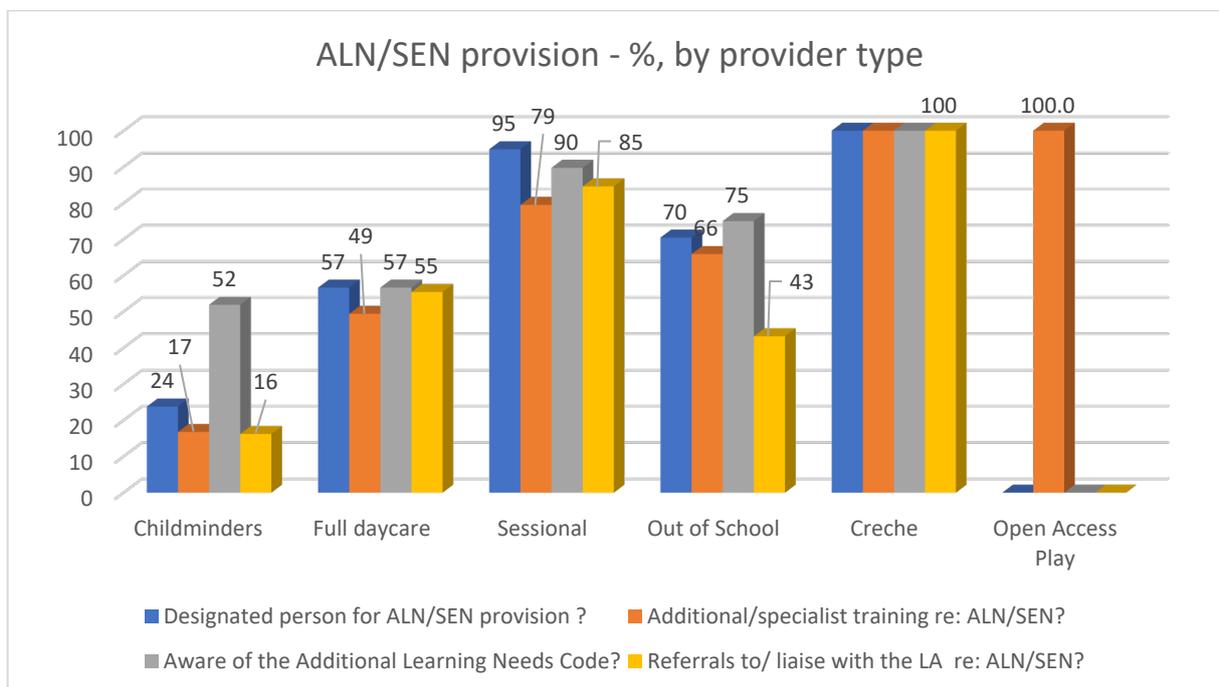
Whilst it is clear that childcare can be an issue for some families with a child with a disability or additional need, the parent survey asked parents to provide reasons why they were not using childcare. Of the 106 respondents, 5 (4.7%) indicated this was because "There is no childcare that can cater for my child's specific needs." When asked to comment on the statement "Childcare caters for my children's needs", 38.6% (154) responses strongly agreed, and a further 42.1% (168) tended to agree.

Childcare providers: ALN/SEN provision

Table: ALN/SEN provision, by provider type

		Designated person for ALN/SEN provision?	Additional/specialist training re: ALN/SEN?	Aware of the Additional Learning Needs Code?	Referrals to/ liaise with the LA re: ALN/SEN?
Childminders	Number	44	31	96	30
	%	24	17	52	16
Full daycare	Number	47	41	47	46
	%	57	49	57	55
Sessional	Number	37	31	35	33
	%	95	79	90	85
Out of School	Number	31	29	33	19
	%	70	66	75	43
Creche	Number	1	1	1	1
	%	100	100	100	100
Open Access Play	Number	0	1	0	0
	%	-	100	-	-

Chart: ALN/SEN provision, by provider type



- Whilst 37 of 39 (95%) of sessional day care settings report having a designated member of staff for ALN/SEN, this drops to 70% for out of school; 57% for full daycare, and 24% for childminding. NB: Although 100% for Creche, all scores are based on a single response)

- 79% of sessional day care settings and 66% of out of school providers reported accessing additional or specialist training. This reduces to fewer than half of full daycare settings (49%) and only 17% of childminders
- Awareness of the Additional Learning Needs Code ranges from 90% in sessional day care; 75% in out of school; 57% in full daycare and 52% in childminding
- Sessional and full daycare report most referrals to and liaison with the local authority (85% and 55% respectively), with 43% of out of school and 16% of childminders reporting this type of contact

Action: Work with Cardiff Inclusion Services, Workforce Development and Cwllwm partners to continue to promote the training offered to childcare providers. The training provides information and advice to increase awareness of the Additional Needs Code and enhance ALN/SEN practice

Action: Work with childcare providers and partners to identify any barriers to accessing training and advice around ALN/SEN

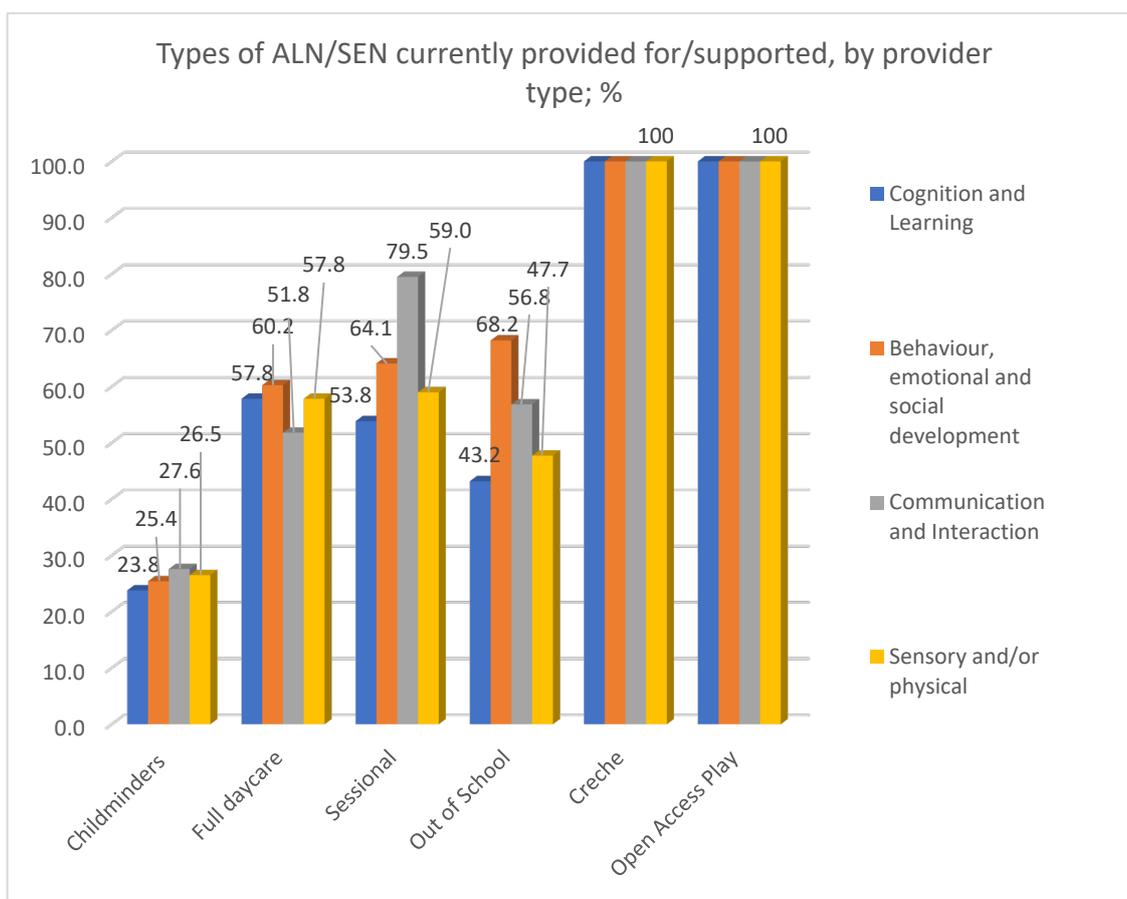
Action: Continue to promote the Assisted Places Grant, which provides funding for additional staffing support to allow access to childcare for the children of working parents who could not otherwise safely attend

Types of ALN/SEN currently provided for / supported by the service

Table: Types of ALN/SEN currently provided for/supported, by provider type; number, %

		Cognition and Learning	Behaviour, emotional and social development	Communication and Interaction	Sensory and/or physical
Childminders	Number	44	47	51	49
	%	23.8	25.4	27.6	26.5
Full daycare	Number	48	50	43	48
	%	57.8	60.2	51.8	57.8
Sessional	Number	21	25	31	23
	%	53.8	64.1	79.5	59.0
Out of School	Number	19	30	25	21
	%	43.2	68.2	56.8	47.7
Creche	Number	1	1	1	1
	%	100	100	100	100
Open Access Play	Number	1	1	1	1
	%	100	100	100	100

Chart: Types of ALN/SEN currently provided for/supported, by provider type; number, %



- Reported provision for children with ALN/SEN across all 4 categories is lowest for childminders, with no more than 51 (27.5% -= for Communication and Interaction) reporting ability to provide support for any category.
- Over half of sessional day care settings (21, 53.8%) and full daycare settings (48, 57.8%) report being able to support children with ALN/SEN around Cognition and Learning, and over 60% of full daycare (50, 60.2%); sessional day care (25, 64.1%) and out of school (30, 68.2%) provide support around Behaviour, Emotional and Social Development. This drops to 25.4% for childminders.
- The ability to support children around Sensory and/or Physical issues was reported by 23 (59%) of sessional day care and 48 (57.8%) of full daycare, with 21 (47.7%) of out of school able to provide.

9. Free Nursery Education and Flying Start Provision

Foundation Phase Nursery Early Education - schools

The following tables set out the number of children receiving funded early education in nursery, primary and special schools, by pupil age and by NPA.

Table: Foundation Phase Nursery Early Education – schools: Cardiff North

NPA	Primary School Name	Total	2/3 year olds Part time	3/4 year olds Part time	4/5 year olds Full time
Cardiff North	Bryn Celyn Primary School	32	12	20	0
Cardiff North	Christ The King R.C Primary School	32	7	25	0
Cardiff North	Coed Glas Primary School	70	15	55	0
Cardiff North	Glyncoed Primary School	41	12	29	0
Cardiff North	Howardian Primary School	91	27	64	0
Cardiff North	Lakeside Primary School	79	23	56	0
Cardiff North	Llanedeyrn Primary School	65	19	46	0
Cardiff North	Llanishen Fach Primary School	69	23	46	0
Cardiff North	Llysaen Primary School	44	1	43	0
Cardiff North	Marlborough Primary School	62	0	61	1
Cardiff North	Pontprennau Primary School	79	24	55	0
Cardiff North	Rhiwbeina Primary School	80	0	80	0
Cardiff North	Rhydypenau Primary School	75	14	61	0
Cardiff North	Springwood Primary School	31	10	21	0
Cardiff North	St Bernadette's R.C Primary School	53	17	36	0
Cardiff North	St David's C.W Primary School	37	12	25	0
Cardiff North	St Philip Evans R.C Primary School	48	14	34	0
Cardiff North	Thornhill Primary School	62	16	46	0
Cardiff North	Ton-Yr-Ywen Primary School	79	17	62	0
Cardiff North	Ysgol Gynradd Gymraeg Pen-y-Groes	16	3	13	0
Cardiff North	Ysgol Y Berllan Deg	61	25	36	0
Cardiff North	Ysgol Y Wern	79	0	79	0
Total		1285	291	993	1

Table: Foundation Phase Nursery Early Education – schools: Cardiff East

NPA	Primary School Name	Total	2/3 year olds Part time	3/4 year olds Part time	4/5 year olds Full time
Cardiff East	Bryn Hafod Primary School	57	16	41	0
Cardiff East	Glan-Yr-Afon Primary School	22	5	17	0
Cardiff East	Greenway Primary School	48	13	35	0
Cardiff East	Meadowlane Primary School	51	14	37	0
Cardiff East	Oakfield Primary School	96	37	59	0
Cardiff East	Pen-Y-Bryn Primary School	42	13	29	0
Cardiff East	Rumney Primary School	77	20	57	0
Cardiff East	St Cadoc's Catholic Primary School	49	19	30	0
Cardiff East	St John Lloyd R.C Primary School	47	16	31	0
Cardiff East	Trowbridge Primary School	25	11	14	0
Cardiff East	Willowbrook Primary School	64	0	64	0
Cardiff East	Ysgol Bro Eirwg	64	12	52	0
Cardiff East	Ysgol Pen Y Pil	41	15	26	0
Total		683	191	492	0

Table: Foundation Phase Nursery Early Education – schools: Cardiff South East

NPA	Primary School Name	Total	2/3 year olds Part time	3/4 year olds Part time	4/5 year olds Full time
Cardiff South East	Adamsdown Primary School	60	15	45	0
Cardiff South East	Albany Primary School	51	17	34	0
Cardiff South East	Allensbank Primary School	28	9	19	0
Cardiff South East	Baden Powell Primary School	31	8	23	0
Cardiff South East	Gladstone Primary School	55	20	35	0
Cardiff South East	Moorland Primary School	53	20	33	0
Cardiff South East	Roath Park Primary School	63	16	47	0
Cardiff South East	St Joseph's R.C Primary School	26	8	18	0
Cardiff South East	St Peter's R.C Primary School	53	15	38	0
Cardiff South East	Stacey Primary School	37	12	25	0
Cardiff South East	Tredegaville C.W Primary School	33	11	22	0
Cardiff South East	Tremorfa Nursery School	62	18	44	0
Cardiff South East	Ysgol Glan Morfa	36	14	22	0
Cardiff South East	Ysgol Mynydd Bychan	53	19	34	0
Total		641	202	439	0

Table: Foundation Phase Nursery Early Education – schools: City & Cardiff South

NPA	Primary School Name	Total	2/3 year olds Part time	3/4 year olds Part time	4/5 year olds Full time
City & Cardiff South	Grangetown Nursery School	134	38	96	0
City & Cardiff South	Mount Stuart Primary School	74	23	51	0
City & Cardiff South	Ninian Park Primary School	91	30	61	0
City & Cardiff South	St Mary The Virgin C.W Primary School	30	4	26	0
City & Cardiff South	St Paul's C.W Primary School	24	8	16	0
City & Cardiff South	Ysgol Gynradd Gymraeg Hamadryad	67	24	43	0
Total		420	127	293	0

Table: Foundation Phase Nursery Early Education – schools: Cardiff South West

NPA	Primary School Name	Total	2/3 year olds Part time	3/4 year olds Part time	4/5 year olds Full time
Cardiff South West	Ely and Caerau Children's Centre	109	54	54	1
Cardiff South West	Herbert Thompson Primary School	80	22	58	0
Cardiff South West	Hywel Dda Primary School	56	17	39	0
Cardiff South West	Kitchener Primary School	70	19	51	0
Cardiff South West	Lansdowne Primary School	60	22	38	0
Cardiff South West	Millbank Primary School	46	16	30	0
Cardiff South West	Pencaerau Primary School	49	14	35	0
Cardiff South West	Severn Primary School	125	38	87	0
Cardiff South West	St Fagan's C.W Primary School	14	0	14	0
Cardiff South West	St Francis RC Primary School	48	15	33	0
Cardiff South West	St Mary's Catholic Primary School	29	7	22	0
Cardiff South West	Trelai Primary School	47	15	32	0
Cardiff South West	Ty Gwyn School	4	1	3	0
Cardiff South West	Windsor Clive Primary School	64	19	45	0
Cardiff South West	Ysgol Gymraeg Nant Caerau	48	7	41	0
Cardiff South West	Ysgol Gymraeg Pwll Coch	57	23	34	0
Cardiff South West	Ysgol Gymraeg Treganna	96	10	85	1
Total		1002	299	701	2

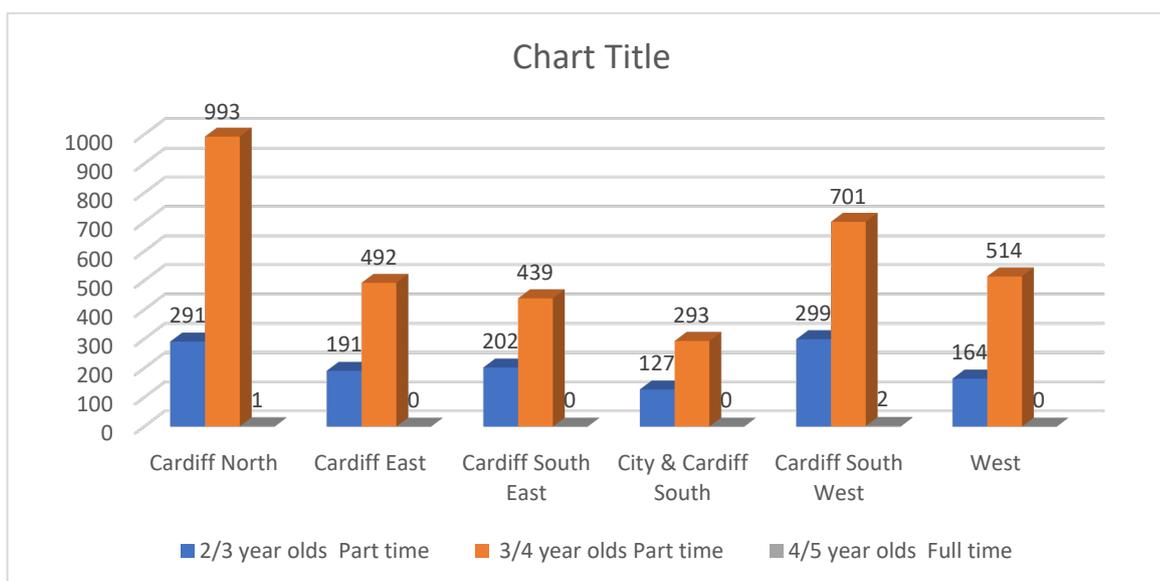
Table: Foundation Phase Nursery Early Education – schools: Cardiff West

NPA	Primary School Name	Total	2/3 year olds Part time	3/4 year olds Part time	4/5 year olds Full time
Cardiff West	Bryn Deri Primary School	43	18	25	0
Cardiff West	Coryton Primary School	24	10	14	0
Cardiff West	Creigiau Primary School	53	15	38	0
Cardiff West	Danescourt Primary School	62	14	48	0
Cardiff West	Gabalfa Primary School	38	13	25	0
Cardiff West	Hawthorn Primary School	35	12	23	0
Cardiff West	Pentrebane Primary School	44	9	35	0
Cardiff West	Peter Lea Primary School	59	19	40	0
Cardiff West	Radyr Primary School	47	7	40	0
Cardiff West	Tongwynlais Primary School	39	9	30	0
Cardiff West	Whitchurch Primary School	80	0	80	0
Cardiff West	Ysgol Glan Ceubal	47	16	31	0
Cardiff West	Ysgol Gymraeg Melin Gruffydd	64	0	64	0
Cardiff West	Ysgol Gynradd Gwaelod Y Garth Primary School	43	22	21	0
Total		678	164	514	0

Table: Foundation Phase Nursery Early Education – nursery, primary and special schools: Cardiff

NPA	Total	2/3 year olds Part time	3/4 year olds Part time	4/5 year olds Full time
Cardiff North	1285	291	993	1
Cardiff East	683	191	492	0
Cardiff South East	641	202	439	0
City & Cardiff South	420	127	293	0
Cardiff South West	1002	299	701	2
West	678	164	514	0
Cardiff	4709	1274	3432	3

Chart: Table: Foundation Phase Nursery Early Education – nursery, primary and special schools: Cardiff



- A total of 4,706 children aged 2 to 3 and 3 to 4 years old access part time early years education through maintained, faith and special schools

Non-maintained early education placements

Table: Non-maintained early education placements – NPA; CIW registration type; main language; registered places; children funded for a part-time early education placement (Summer term 2021)

NPA	CIW registration type	Main language	Registered places	Number of children funded
Cardiff North	Sessional day care	Welsh	33	12
Cardiff South West	Sessional day care	Welsh	19	2
	Full daycare	Welsh	32	3
Cardiff West	Full daycare	Welsh	36	0
	Full daycare	Welsh	33	16
	Full daycare	Welsh	58	2
	Sessional day care	Welsh	24	3
	Sessional day care	Welsh	36	18
Total			271	56

- A total of 56 children were funded to attend 6 non-maintained settings for a funded early education place.
- All settings are Welsh medium
- NB: A total of 144 settings (86 childminders, 47 full daycare and 11 sessional day care settings reported having children attending between June 7th and July 4th for an early education placement, even though many did not report they were funded to provide.
- The following average weekly attendance for early education placements were reported: childminders – 197; full daycare – 2146, sessional – 314.

Table: Reported and funded early education placements, all provider types

Provider type	Reported weekly average attendance for early education placement	Calculated daily average attendance (weekly/5)	Actual daily attendance (children funded for early education by Education department)	Difference
Childminder	197	39	0	39
Full daycare	2146	429	21	408
Sessional care	314	62	35	27
Total	2657	530	56	474

- Assuming a daily average attendance across all providers who reported having children in attendance for an early education place of 530 children per day, $530 - 56 = 474$ children per day were being recorded under the wrong category of attendance.

Action: Work with Education, Welsh Government and Care Inspectorate Wales colleagues, to ensure childcare providers correctly understand the use and meaning of terminology relating to early education placements, in order to improve the accuracy of future SASS and other data collection exercises

Flying Start

Table: Flying Start: Cardiff: settings – all providers; languages (SASS)

Settings	
Full daycare - English	6
Full daycare Welsh	3
Sessional - English	19
Sessional - both	1
Creche - English	1
Childminder - English	2
Out of school	1

Table: Flying Start: Cardiff: settings – all providers; languages (Flying Start)

Settings	
Full daycare - English	4
Full daycare Welsh	3
Sessional - English	22
Sessional - Welsh	3
Creche - English	1
Childminder - English	0
Out of school	0

- It would appear that SASS data was not submitted by 3 sessional day care English medium and 3 sessional day care Welsh medium providers
- Two full daycare (English medium) and one sessional day care settings (both languages) appear to have incorrectly reported providing Flying Start places.
- The table below show the number of settings who indicated they were a Flying Start provider in black, and data supplied by Cardiff Council’s Flying Start team in red

Table: Flying Start settings – provider type and NPA; SASS (Flying Start)

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West
Full daycare - English	-	2 (1)	1 (0)	1 (1)	2 (2)	-
Full daycare Welsh	-	1 (1)	-	-	2 (2)	-
Sessional - English	1 (2)	6 (7)	3 (4)	2 (2)	6(6)	1 (1)
Sessional - both	1 (0)	-	0 (1)	-	0	-
Sessional - Welsh	0 (1)	-	-	-	-	-
Creche - English	-	-	-	-	1 (1)	-

Table: Places purchased per Flying Start setting by NPA and registration type

NPA	Setting type	Places purchased per day
Cardiff East	Full daycare	9
	Full daycare	20
	Sessional	16
	Sessional	28
	Sessional	32
	Sessional	56
	Sessional	40
	Sessional	12
Cardiff North	Sessional	8
	Sessional	48
	Sessional	32
Cardiff South East	Sessional	12
	Sessional	56
	Sessional	36
	Sessional	56
	Sessional	12

NPA	Setting type	Places purchased per day
Cardiff South West	Full daycare	24
	Full daycare	32
	Full daycare	22
	Full daycare	24
	Sessional	56
	Sessional	48
	Sessional	40
	Sessional	48
	Sessional	56
	Sessional	20
	Creche	15
Cardiff West	Sessional	40
City & Cardiff South	Full daycare	12
	Sessional	40
	Sessional	56

Flying Start: attendance

- For the latest period reported on, of the 3,802 places purchased, 3,077 were filled. This represents an occupancy rate of 81%. Non-attendance may be due to illness, Covid related household self-isolation or other causes.
- Two out of school and one reported being Flying Start settings. This is not accurate as no out of school or childminders provide Flying Start places

Childcare requested but declined place offered.

254 children were eligible and there were 10 Flying Start Childcare Access Forms not completed at the outset. Of the 241 offers made for children eligible and born between 1/1/2019 & 31/3/2018, 19 were declined despite a second offer being made in all cases or conversations taking place with parents. This is equal to 7.8%.

Table: Flying Start childcare requested but declined place offered.

Reasons declined place	Already attending elsewhere/childcare no longer wanted	Changed mind on language	Child is too young	Moving address	Suitable session not available	No response to offer	Sibling at a different school	Total
Number of places declined	3/7	0	5	0	2	1	1	19

Parents who declined childcare at the outset for children eligible and born between 1/1/2019 – 31/3/2019.

There were 16 children out of the 254 eligible who declined childcare = 6%.

In all circumstances, the Health Visitors had provided legitimate reasons.

Table: Parents who declined childcare at the outset for children eligible and born between 1/1/2019 – 31/3/2019.

Reasons declined place	Already attending elsewhere	Too young	Moving address	Moving home/Other	Total
Number of places declined	5	2	5	4	16

Welsh medium Flying Start

- 34 new Welsh medium Flying Start places were offered. Two were declined by parents who reported they had “changed their mind”. With the existing Welsh medium places funded, this now brings the total to 78 Welsh medium Flying Start childcare places.

Strengths and weaknesses

- Overall, there are sufficient Flying Start childcare places available for all eligible children.
- Partnership working, supported by the co-location of Flying Start and the Childcare Business Support Team, provides opportunities to share skills, knowledge and experience, and for best practice identified in Flying Start settings to be shared with other childcare providers.
- The co-location and partnership approach enhances Flying Start access to Cardiff Family Advice and Support (CFAS) and to training provided via the Early Help Workforce Development and Accredited Centre (WFDAC)
- Business and quality assurance support provided by the CBS Team also supports Flying Start settings

Action: With Flying Start, Welsh Government and Care Inspectorate Wales colleagues, ensure childcare providers correctly understand the use and meaning of terminology relating to Flying Start, in order to improve the accuracy of future SASS and other data collection exercises

10. Welsh medium childcare provision and the Welsh in Education Strategic Plan (WESP)

10.1. Welsh in Education Strategic Plan – WESP

Cymraeg 2050

In 2017, the Welsh Government published its Welsh language strategy *Cymraeg 2050: A Million Welsh Speakers* in accordance with Section 78 of the Government of Wales Act 2006. The strategy supports ‘*the promotion and facilitation of the use of the Welsh language*’ and its long-term aim is for Wales to have one million Welsh speakers by 2050. The strategy names Welsh-medium immersion education as the ‘*principal method for ensuring that children can develop their Welsh language skills, and for creating new speakers*’ (Cymraeg 2050: A Million Welsh Speakers, pg21). Therefore the availability of Welsh-medium education will be key to meeting the target of one million Welsh speakers.

WESP

The Welsh in Education Strategic Plans (Wales) Regulations 2019 require Local Authorities to set a ten-year target outlining the expected increase in Year 1 children who are taught through the medium of Welsh in the local authority’s area during the lifespan of a Plan. Cardiff is committed to achieving a scale of growth in line with the 25-29% as provided by the Welsh Government . The local target must, however, balance ambition with an understanding of the prevailing trends, which includes falling birth rates and heightened uncertainty relating to school admission choices due to the pandemic. Cardiff’s ten-year target is therefore to “increase the percentage of Year 1 children who are taught through the medium of Welsh in Cardiff by 9% with 27% of the eligible cohort.

The Cardiff WESP 2022- 2031, which is currently out for consultation, notes that:

“Currently 18.5% of nursery children/ three-year-olds taking up a nursery education place in Cardiff receive their education through the medium of Welsh. Our targets for the next ten years are as set out in the table overleaf:

Table: WESP

Numbers and % of 3-year olds receiving their education through the medium of Welsh									
2022 - 2023		2023 - 2024		2024 - 2025		2025 - 2026		2026 - 2027	
698 –	19.0 -	733 -	19.8 -	755 -	20.5 -	778 -	21.3 -	803 -	22 - 24.4%
740	19.8%	790	21%	826	22.1%	863	23.3%	902	
2027 - 2028		2028 - 2029		2029 - 2030		2030 - 2031		2031 - 2032	
830 –	22.8 -	857 -	23.5 -	883 -	24.3 -	911 -	25 -	931 -	25.8 - 30.2%
943	25.6%	984	26.7%	1024	27.9%	1066	29%	1090	

To achieve this outcome and grow the take up of Welsh-medium nursery education places from 18.5% to between 25-30% of the eligible population cohort in the first 5 years we will:

1. Develop Welsh-medium wraparound childcare options to support parents accessing the Childcare Offer for Wales in conjunction with our partners, including Mudiad Meithrin, through establishing new Cylch Meithrin settings for Ysgol Melin Gruffydd and the new school to be established in Plasdŵr

By the end of the 10-year plan we will

8. Develop further Welsh-medium wraparound childcare options to support parents accessing the Childcare Offer for Wales 30 hour offer in conjunction with our partners including Mudiad Meithrin through:

- Examining the feasibility of building in space and facilities for delivery of Welsh-medium childcare (such as Cylch Meithrin provision) to be built into each new Welsh-Medium primary school.
- Exploring opportunities to building in space and facilities for delivery of Welsh-medium childcare (such as Cylch Meithrin provision) to be built into existing Welsh-Medium primary schools utilising Welsh capital grants

The above actions align with the updated Welsh Government document *Cymraeg 2050: our plan for 2021 to 2026*, which identifies the following areas for action

1. Invest each year over the next five years to expand our Welsh-medium early years provision, including nursery groups and taster sessions for parents, by:
 - Supporting the opening of 60 new Cylchoedd Meithrin and 60 new Cylchoedd Ti a Fi in new settings to support the expansion of Welsh-medium education.
 - Expanding the training programme for early years practitioners by increasing apprenticeships, expanding the Academi programme and expanding the Croesi'r Bont programme which immerses new practitioners in Welsh.

8. *Develop targets in terms of the number of children in Welsh-medium nursery groups and the percentage of children in Welsh-medium nursery groups transferring to Welsh-medium primary schools.*

The Co-operation Agreement

The Co-operation Agreement between the Welsh Government and Plaid Cymru, announced on November 22, 2021, states a commitment to:

“Expand free childcare to all two-year-olds with a particular focus on providing and strengthening Welsh-medium childcare.”

At this stage there are no further details around this policy announcement, however, in order to deliver this outcome there will need to be an expansion of Welsh medium provision, either through seeking to increase the number of places delivered by existing Welsh medium providers, or by creating new Welsh medium settings.

As with all childcare development, the ongoing viability of existing providers must be considered, as an increase in the provision of childcare places without an increase in demand will reduce the number of children attending per setting, potentially to the point where some settings are no longer viable.

10.2. Welsh medium childcare provision

This section of the CSA will only present data extracted from the SASS from providers who indicated Welsh was the “Main Language/s through which your service is provided” in their SASS response.

Each section will consist of an overview of Welsh medium provision across all provider types, followed by brief summary of provision, capacity, waiting lists and vacancies by relevant provider types.

Table: Welsh medium childcare: Cardiff – settings, all provider types, by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Childminder	-		-	-	3	1	4
Full daycare	-	1	2	1	4	5	13
Sessional	3	-	-	-	-	1	4
Out of school	-	-	1	1	2	1	5
Total	3	1	3	2	9	8	26

Chart: Welsh medium childcare: Cardiff – settings, all provider types, by NPA

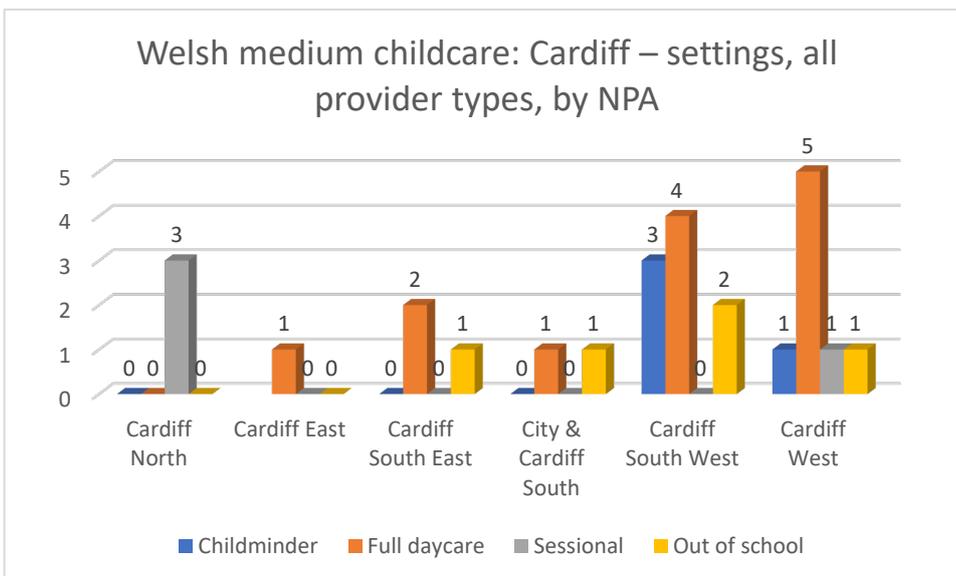
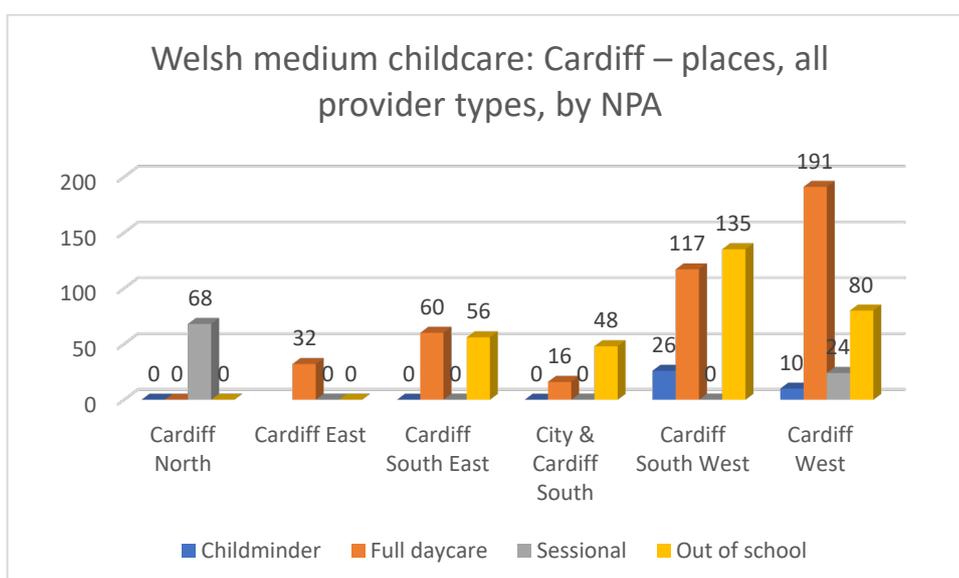


Table: Welsh medium childcare: Cardiff – places, all provider types, by NPA

	Cardiff North	Cardiff East	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West	Cardiff
Childminder	-		-	-	26	10	36
Full daycare	-	32	60	16	117	191	416
Sessional	68	-	-	-	-	24	92
Out of school	-	-	56	48	135	80	319
Total	68	32	116	64	278	305	863

Chart: Welsh medium childcare: Cardiff – places, all provider types, by NPA



- Compared to the 2016 CSA, there is one more Welsh medium setting
- The distribution of Welsh medium childcare varies across the NPAs from a single full daycare setting providing 32 places in Cardiff East to 8 providers in Cardiff West (305 places) and 9 in Cardiff South West (278 places)
- The distribution has some alignment with concentrations of Welsh speakers. The largest number of Welsh speakers are in Canton in Cardiff South West, and Whitchurch in Cardiff West. Low numbers of Welsh speakers are reported in Llanrumney and Rumney, in Cardiff East.
- Generally, the largest waiting lists for Welsh medium provision are recorded in the NPAs with the largest amount of Welsh medium provision.
 - In Cardiff West, 25 children appear to be waiting for a full-time nursery place, with 15 waiting for a Cylch Meithrin AM place, and the same number are reported to be waiting for a PM Cylch Meithrin

- There are 146 children reported as waiting for an immediate after school place, with 95 in Cardiff South West and 30 in Cardiff West. A further 21 children are identified as waiting for a Welsh medium place in City and Cardiff South

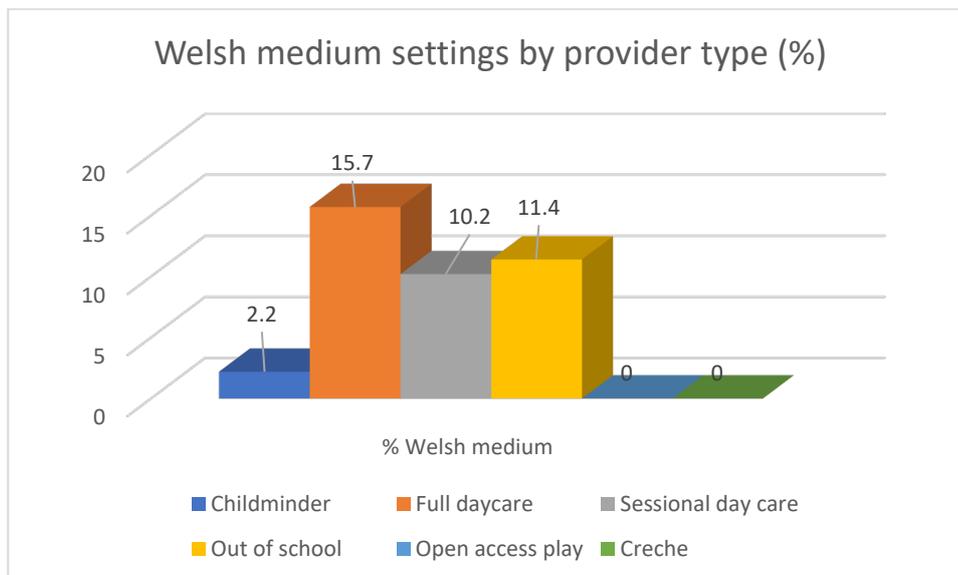
Welsh medium settings (%) by provider type

NB: based on SASS returns

Table: Welsh medium settings (%) by provider type

Provider type	Welsh	English	Both	Total	% Welsh medium
Childminder	4	175	6	185	2.2
Full daycare	13	64	6	83	15.7
Sessional day care	4	33	2	39	10.2
Out of school	5	37	2	44	11.4
Open access play	0	1	0	1	0
Creche	0	1	0	1	0

Chart: Welsh medium settings (%) by provider type



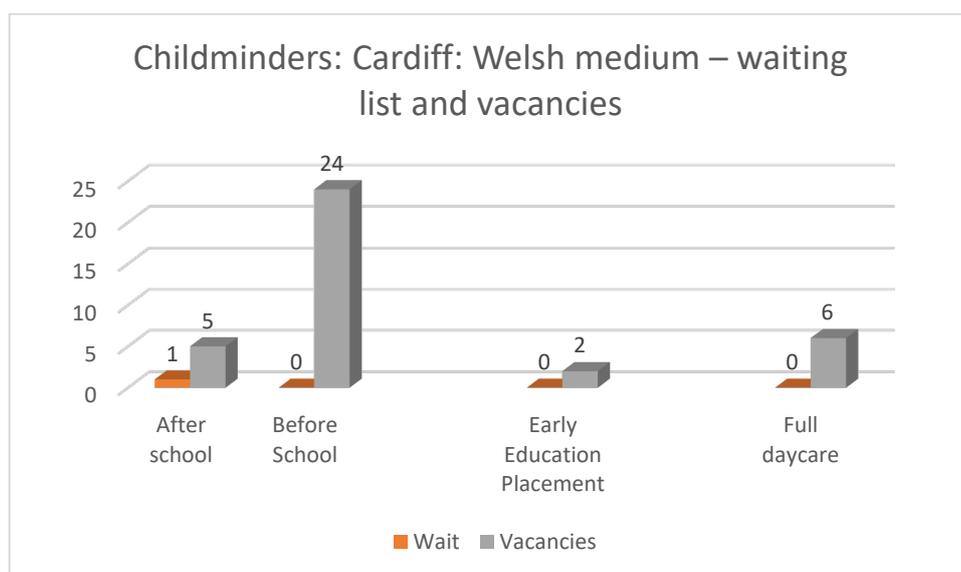
- The highest number (13 of 83) and % (15.7%) of Welsh medium settings are registered as full daycare
- There are four Welsh medium sessional providers (10.2% of providers), and four Welsh medium childminders (2.2% of providers)
- 5 of the 44 out of school providers operate through the Welsh language (11.4%)
- There is no Welsh medium creche or open access play provision

Childminders: Welsh medium – waiting list and vacancies

Table: Childminders: Cardiff: Welsh medium – waiting list and vacancies

	Waiting list	Vacancies
After school	1	5
Before School	0	24
Early Education Placement	0	2
Full daycare	0	6

Chart: Childminders: Cardiff: Welsh medium – waiting list and vacancies



- Overall, there are more vacancies than children waiting an immediate place for all services provided by Welsh medium childminders

Table: Childminders: Welsh medium – waiting list and vacancies, by NPA

Childminder	Cardiff South West		Cardiff West	
	Waiting	Vacancies	Waiting	Vacancies
After school	0	5	1	0
Before School	0	4	0	20
Early Education Placement	0	2	-	-
Full daycare/Full day nursery	0	6	-	-

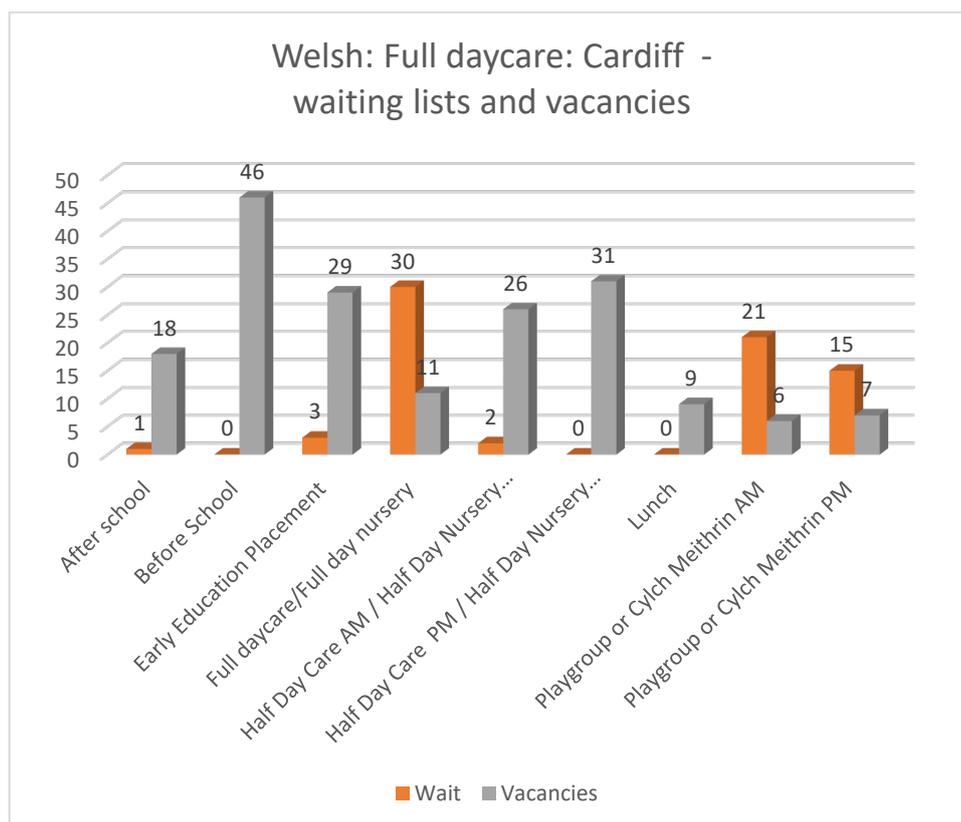
- When broken down by NPA, there is one child waiting for an after school place in Cardiff West where no vacancy is reported

Full daycare: Welsh medium – waiting list and vacancies

Table: Full daycare: Cardiff: Welsh medium – waiting list and vacancies

	Waiting list	Vacancies
After school	1	18
Before School	0	46
Early Education Placement	3	29
Full daycare/Full day nursery	30	11
Half Day Care AM / Half Day Nursery AM	2	26
Half Day Care PM / Half Day Nursery PM	0	31
Lunch	0	9
Playgroup or Cylch Meithrin AM	21	6
Playgroup or Cylch Meithrin PM	15	7

Chart: Full daycare: Cardiff: Welsh medium – waiting list and vacancies



- Waiting lists exceed vacancies for Welsh medium full daycare (shortfall 30 - 11 = 19 places); Playgroup/Cylch Meithrin AM (shortfall 21 – 6 = 15 places) and Playgroup/Cylch Meithrin PM (shortfall 15 – 7 = 8 places)

Table: Full daycare: Welsh medium – waiting list and vacancies, by NPA

	Cardiff East		Cardiff South East		City & Cardiff South		Cardiff South West		Cardiff West	
	Waiti	Vacanc	Waiti	Vacanc	Waiti	Vacanc	Waiti	Vacanc	Waiti	Vacanc
Full Daycare										
After school	-	-	1	0	-	-	0	6	0	12
Before School	0	20	-	-	-	-	0	16	0	10
Creche		-	-	-	-	-		-	-	
Early Education Placement	0	22	0	7	1	0	2	0		
Full daycare/ Full day nursery	-	-	-	-	-	-	0	6	30	5
Half Day Care AM / Half Day Nursery AM	-	-	-	-	-	-	0	21	2	5
Half Day Care PM / Half Day Nursery PM	-	-	-	-	-	-	0	21	0	10
Lunch	-	-	-	-	-	-	0	9	-	-
Playgroup / Cylch Meithrin AM	0	2	0	4	6	0	-	-	15	0
Playgroup / Cylch Meithrin PM	0	6			0	1	-	-	15	0

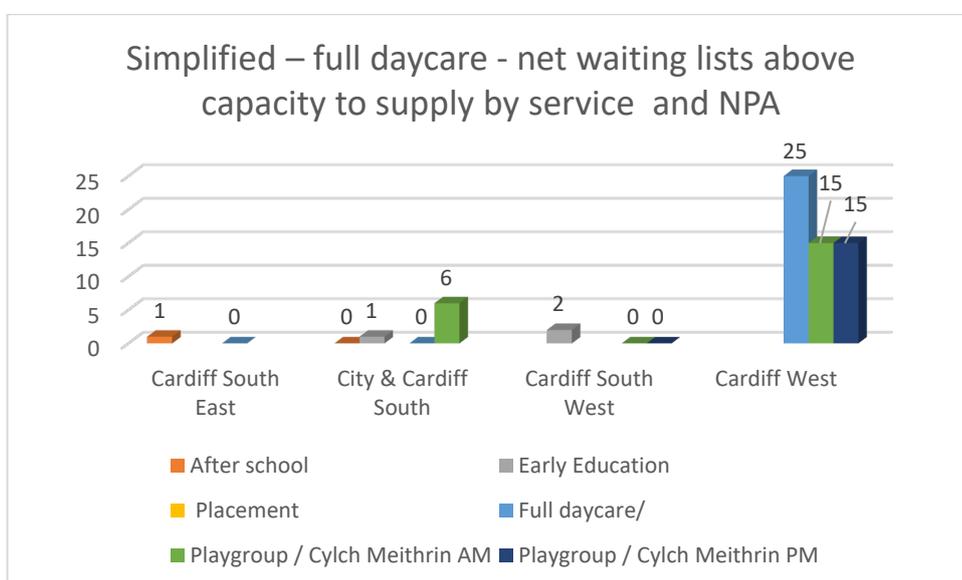
Table: Full daycare: Welsh medium – waiting list and vacancies, by NPA

	Cardiff South East		City & Cardiff South		Cardiff West	
	Waiting	Vacancies	Waiting	Vacancies	Waiting	Vacancies
After school	1	0	-	-	-	-
Early education placement			1	0		
Full daycare/Full day nursery					30	5
Playgroup / Cylch Meithrin AM			6	0	15	0
Playgroup / Cylch Meithrin PM					15	0

Table: Simplified – full daycare - net waiting lists above capacity to supply by service

	Cardiff South East	City & Cardiff South	Cardiff South West	Cardiff West
Full Daycare	Waiting	Waiting	Waiting	Waiting
After school	1	-		
Early Education		1	2	
Placement				
Full daycare/	-	-		25
Playgroup / Cylch Meithrin AM		6	-	15
Playgroup / Cylch Meithrin PM			-	15

Chart: Simplified – full daycare - net waiting lists above capacity to supply by service and NPA



- When broken down by NPA, there is one child waiting for an after school place in Cardiff South East where no vacancy is reported. In City and Cardiff South one child is reported waiting for an early education place, although no children are recorded as waiting for place by the Education department. Six children are reported waiting for a Cylch Meithrin AM service. In Cardiff West, 25 children appear to be waiting for a full-time nursery place, with 15 waiting for a Cylch Meithrin AM place, and the same number are reported to be waiting for a PM Cylch Meithrin

Action: Further investigate if demand above capacity to supply exists for Welsh medium full daycare or Cylch Meithrin sessions in Cardiff West

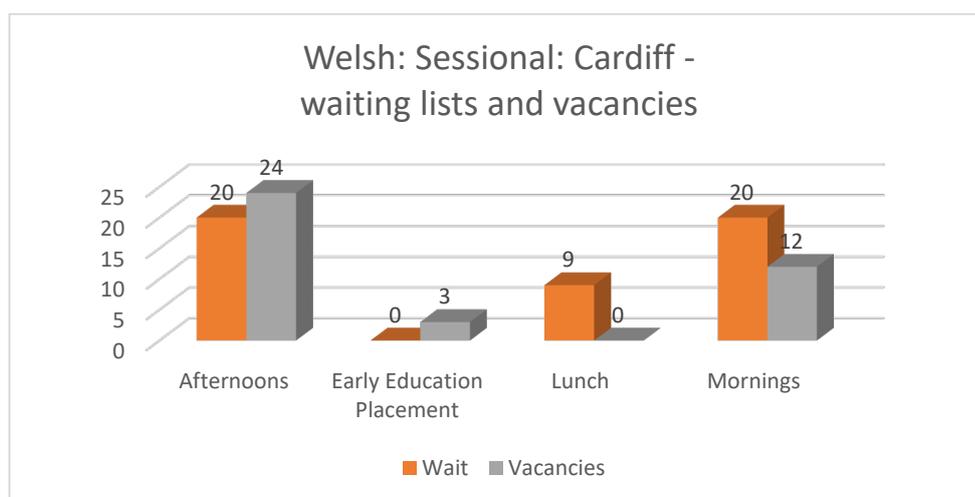
Explore with existing providers within areas where demand above capacity to supply exists, whether there are possibilities to expand existing provision.

Sessional care: Welsh medium – waiting list and vacancies

Table: Sessional day care: Cardiff: Welsh medium – waiting list and vacancies

	Waiting list	Vacancies
Afternoons	20	24
Early Education Placement	0	3
Lunch	9	0
Mornings	20	12

Chart: Sessional day care: Cardiff: Welsh medium – waiting list and vacancies



- Waiting lists only exceed vacancies for Morning provision (20 on waiting list, 12 vacancies = shortfall of 8) in the Cardiff North NPA.

Table: Sessional day care:

	Cardiff North	
	Waiting list	Vacancies
Afternoons	20	24
Early Education Placement	0	3
Lunch	9	0
Mornings	20	12

Action: Further investigate if demand above capacity to supply exists for Welsh medium Morning sessions in Cardiff North

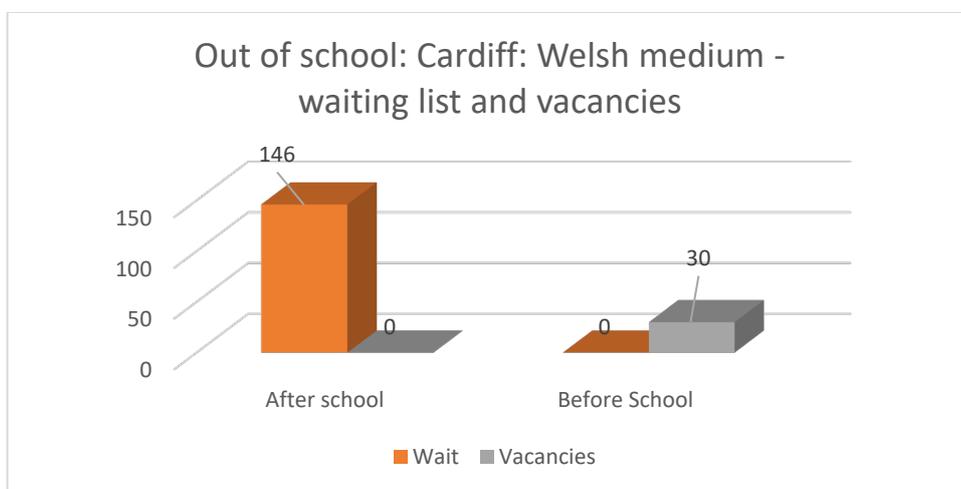
Explore with existing providers within areas where demand above capacity to supply exists, whether there are possibilities to expand existing provision.

Out of school: Welsh medium – waiting lists and vacancies

Table: Out of school: Cardiff: Welsh medium – waiting lists and vacancies

	Waiting list	Vacancies
After school	146	0
Before School	0	30

Chart: Out of school: Welsh medium – waiting lists and vacancies



- Overall, whilst there are 30 reported vacancies for before school, there are 146 children reported as waiting for an immediate after school place., with 95 in Cardiff South West and 30 in Cardiff West. A further 21 children are identified as waiting for a Welsh medium place in City and Cardiff South

Table: Welsh medium – waiting list and vacancies, by NPA

Out of School	City & Cardiff South		Cardiff South West		Cardiff West	
	Waiting	Vacancies	Waiting	Vacancies	Waiting	Vacancies
After school	21	0	95	0	30	0

- Whilst demand above capacity to supply is recorded for Welsh medium after school services in 3 NPAs, further investigation will be required to assess if this data is accurate.
- For example, one setting reporting an immediate waiting list is registered to provide 400 places per week and has reported an average weekly attendance of around 300 children, but reported 95 children waiting for an immediate place. It may be the case that the data relating to ‘vacancies’ has been transposed into the ‘children waiting for an immediate place’ column in error.

Action: Identify if robust evidence for unmet Welsh-medium out of school care demand exists in City & Cardiff South, Cardiff West and Cardiff South West.

Action: Identify if current Welsh medium out of school providers have the capacity to expand places offered.

Action: Work with partners including the Welsh Government, Education and Mudiad Meithrin to deliver the actions identified in the Cardiff WESP 2022 - 2031

11. Free Breakfast Club provision

Since the 2016 CSA, the following schools have commenced delivering the Free Breakfast provision.: All Saints Primary, Coryton Primary, Kitchener Primary and Ysgol Y Wern. Marlborough Road Primary has ceased providing. Table: School Breakfast club provision

Cardiff North	Cardiff East	Cardiff South East	Cardiff City & South	Cardiff South West	Cardiff West
All Saints C.W Primary School	Bishop Child's Primary	Adamsdown Primary	Grangetown Primary	Creigiau Primary	Bryn Deri Primary
Birchgrove Primary	Bryn Hafod Primary School	Albany Primary School	Mount Stuart Primary	Danescourt Primary	Coryton Primary School
Bryn Celyn Primary	Glan yr Afon Primary	Allensbank Primary	Ninian Park Primary	Ely & Caerau Children's Centre	Fairwater Primary
Coed Glas Primary	Greenway Primary School	Baden Powell Primary	St. Cuthbert's Primary	Herbert Thompson Primary School	Gabalfa Primary
Glyncod Primary School	Meadowlane Primary School	Gladstone Primary School	St. Mary the Virgin School	Hywel Dda Primary School	Gwaelod Y Garth Primary
Llanedeyrn Primary School	Oakfield Primary School	Moorland Primary	St. Patrick's Primary School	Kitchener Primary	Hawthorn Primary
Llanishen Fach Primary School	Pen y Bryn Primary School	St. Alban's Primary	St. Paul's Primary School	Lansdowne Primary	Holy Family Primary
Llysfaen Primary School	Rumney Infants	St. Josephs Primary		Millbank Primary I	Llandaff CiWPrimary
Rhiwbina Primary School	Rumney Junior	St. Monica's Primary		Pencaerau Primary	Meadowbank School
St. David's Primary	St. Cadoc's Primary School	Stacey Primary		Radnor Primary	Pentrebane Primary
St. Philip Evans School	St. John Lloyd Primary	Tredegarville Primary		St. Fagan's Primary	Pentyrch Primary
Springwood Primary	St. Mellons Primary School	Tremorfa Nursery		St. Francis Primary	Peter Lea Primary
The Court School	Trowbridge Primary School	Ysgol Glan Morfa		Severn Primary	Riverbank School
The Hollies School	Willowbrook Primary	Ysgol Mynydd Bychan		Trelai Primary School	Tongwynlais Primary
Thornhill Primary School	Ysgol Bro Eirwg			Ty Gwyn School	Whitchurch Primary I
Ton-Yr-Ywen Primary School	Ysgol Pen y Pil			Windsor Clive Primary	Ysgol Coed y Gof
Ysgol Pen y Groes				Ysgol Nant Caerau	Ysgol Glan Ceubal
Ysgol Y Berllan Deg				Ysgol Pwll Coch	Ysgol Melin Gruffydd
Ysgol Y Wern				Ysgol Treganna	Ysgol Pencae

12. Working Tax Credit/ Universal Credit and Employer Supported Childcare/ Tax Free Childcare

Working Tax Credit/ Universal Credit

Parents/carers may be able to claim up to 85 per cent of their childcare costs if eligible for Universal Credit and meet some additional conditions. The amounts a parent/carer could receive in childcare costs are:

- a maximum of £646.35 per month for one child
- a maximum of £1108.04 per month for 2 or more children

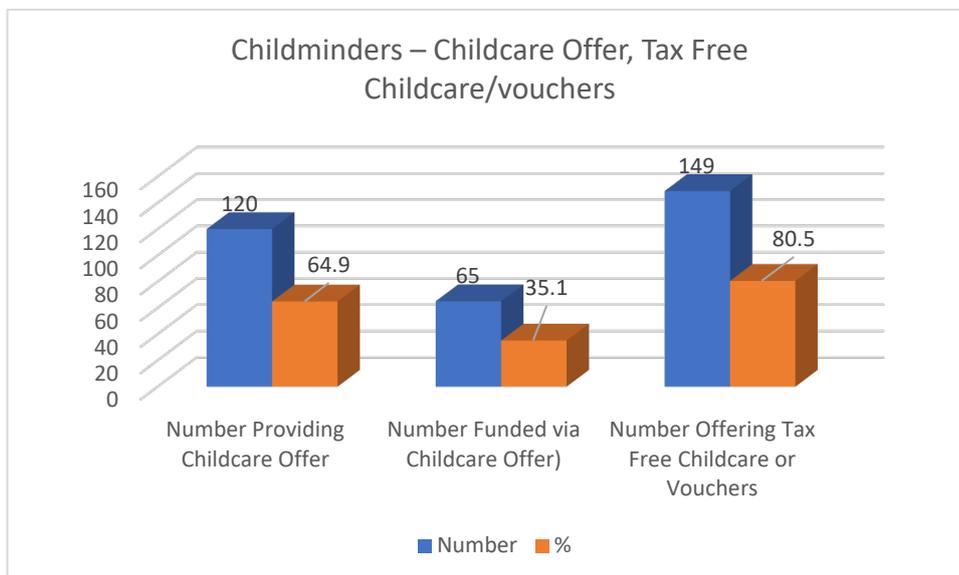
Childcare support is paid in arrears and is only applicable to childcare costs incurred at a CIW registered childcare service. All data submitted via the SASS and used in this document, unless specifically stated as otherwise, has been supplied by CIW registered services.

Childminders (n185)

Table: Childminders – Childcare Offer, Tax Free Childcare/vouchers

	Number	%
Number Providing Childcare Offer	120	64.9
Number Funded via Childcare Offer	65	35.1
Number Offering Tax Free Childcare or Vouchers	149	80.5

Chart: Childminders – Childcare Offer, Tax Free Childcare/vouchers



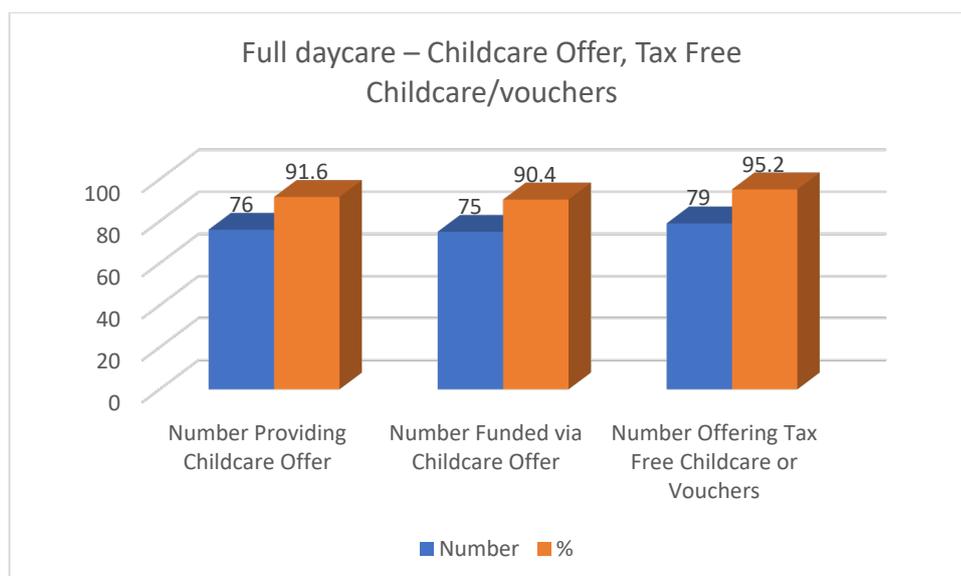
- Whilst nearly 65% (120 of 185) of childminders are signed up to provide the Childcare Offer, only 65 (35.1%) reported currently receiving funding
- 149 (80.5%) of childminders are signed up to provide Tax Free Childcare and/or accept Childcare Vouchers

Full daycare (n83)

Table: Full daycare – Childcare Offer, Tax Free Childcare/vouchers

	Number	%
Number Providing Childcare Offer	76	91.6
Number Funded via Childcare Offer	75	90.4
Number Offering Tax Free Childcare or Vouchers	79	95.2

Chart: Full daycare – Childcare Offer, Tax Free Childcare/vouchers



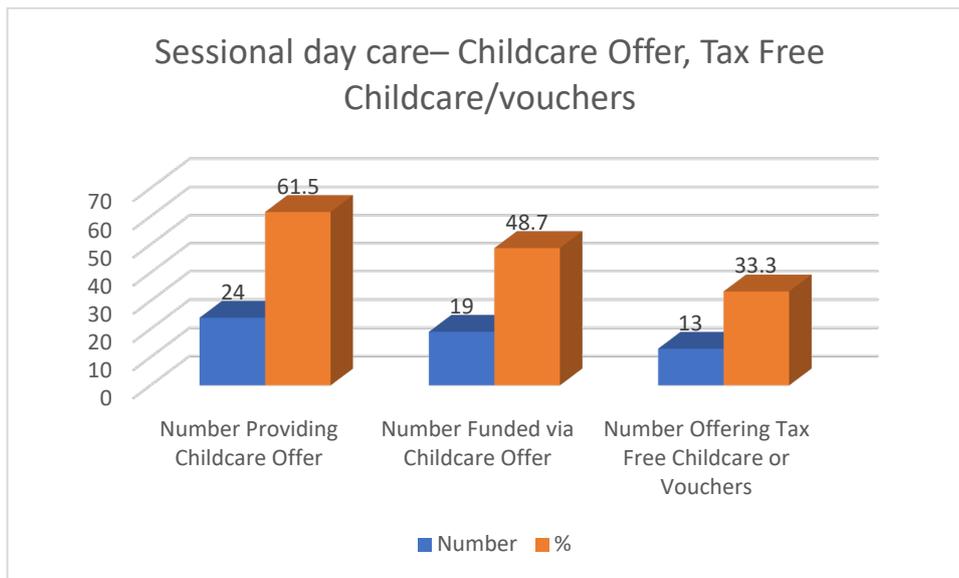
- Over 90% of full daycare settings both provide, and receive funding from, the Childcare Offer (76 and 75 of 83 respectively)
- Over 95% of full daycare settings (79 of 83) are signed up to provide Tax Free Childcare and/or accept Childcare Vouchers

Sessional day care (n39)

Table: Sessional day care – Childcare Offer, Tax Free Childcare/vouchers

	Number	%
Number Providing Childcare Offer	24	61.5
Number Funded via Childcare Offer	19	48.7
Number Offering Tax Free Childcare or Vouchers	13	33.3

Chart: Sessional day care– Childcare Offer, Tax Free Childcare/vouchers



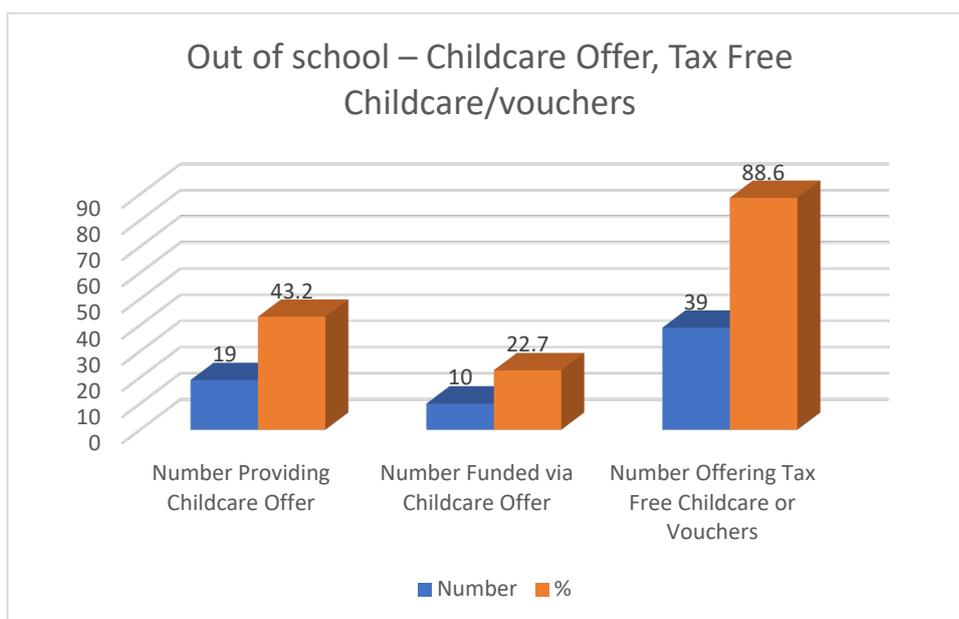
- 24 of 39 (61.5%) of sessional day care providers are signed up to provide the Childcare Offer
- 19 (48.7%) reported currently receiving funding
- Only 13 (33.3%) of sessional day care providers are signed up to provide Tax Free Childcare and/or accept Childcare Vouchers This is the lowest proportion of any provider type

Out of school (n44)

Table: Out of school – Childcare Offer, Tax Free Childcare/vouchers

	Number	%
Number Providing Childcare Offer	19	43.2
Number Funded via Childcare Offer	10	22.7
Number Offering Tax Free Childcare or Vouchers	39	88.6

Chart: Out of school – Childcare Offer, Tax Free Childcare/vouchers



- 19 of 44 (43.2%) of out of school providers are signed up for the Childcare Offer
- Only 10 of these (22.7%) reported receiving funding
- 39 out of school settings are signed up to provide Tax Free Childcare and/or accept Childcare Vouchers

Open access play (n1)

- The setting that responded does not provide the Childcare Offer, and is not signed up to provide Tax Free Childcare and/or accept Childcare Vouchers

Creche (n1)

- The setting that responded provides, and is funded by, the Childcare Offer, but is not signed up to provide Tax Free Childcare and/or accept Childcare Vouchers

Action: Target sessional day care providers to encourage more to sign up to provide Tax Free Childcare and/or accept Childcare Vouchers

Action: Consider with partners (Welsh Government, CIW) how data regarding childcare providers' use of Working Tax Credits/Universal Credit support for childcare costs could be collected and monitored

13. Sustainability

Childcare providers were asked via the SASS “Based on the current situation, are you fairly confident that it would be financially sustainable to continue to run your childcare provision for?”

The data has been split into ‘English/Both’ and ‘Welsh’ providers to examine if any significant differences occur.

Childminders (n185)

Table: childminder sustainability

	Don't Know	6 months	Year or longer	Total
Childminder, English/Both	57	5	119	181
%	31.5	2.8	65.7	
Childminder, Welsh	2	0	2	4
%	50	-	50	

Chart: childminder sustainability



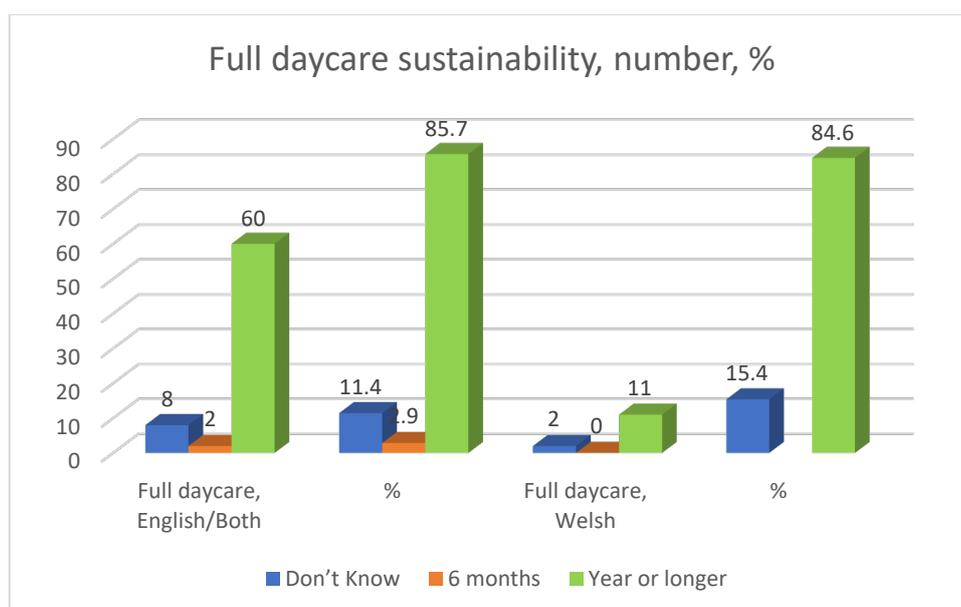
- A higher % of ‘English/Both’ childminders were confident that they would be sustainable for a year or longer than Welsh medium childminders (65.7% compared to 50%), although care needs to taken as there were only 4 Welsh medium providers that responded.

Full daycare (n83)

Table: full daycare sustainability

	Don't Know	6 months	Year or longer	Total
Full daycare, English/Both	8	2	60	70
%	11.4	2.9	85.7	
Full daycare, Welsh	2	0	11	13
%	15.4	-	84.6	

Chart: full daycare sustainability



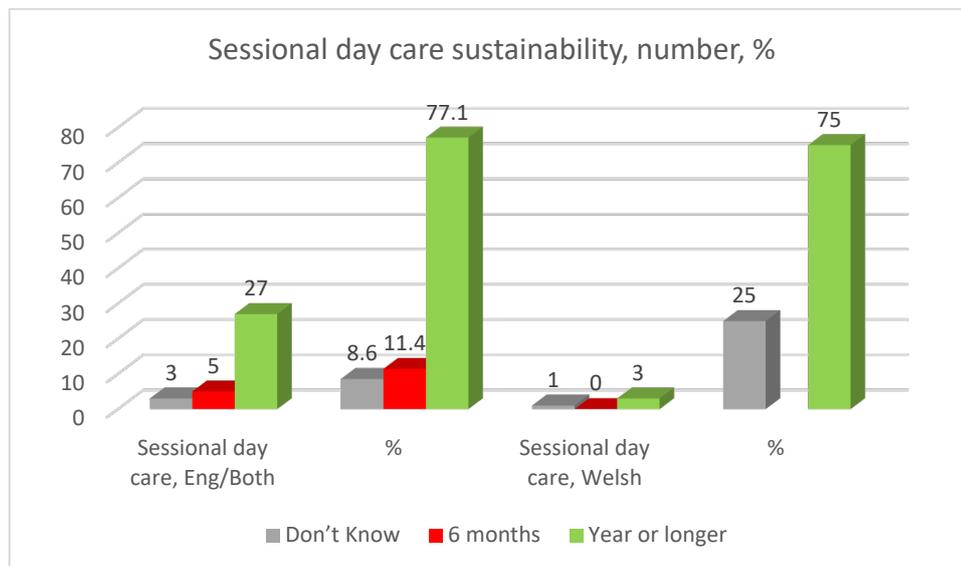
- Predicted financial sustainability for 'English/Both' and Welsh medium were very similar (85.7% and 84.6%)
- 2 English/Both providers (2.9%) were only confident in their sustainability for the next 6 months

Sessional day care (n39)

Table: Sessional day care sustainability

	Don't Know	6 months	Year or longer	Total
Sessional day care, English/Both	3	5	27	35
%	8.6	11.4	77.1	
Sessional day care, Welsh	1	0	3	4
%	25		75	

Chart: Sessional day care sustainability



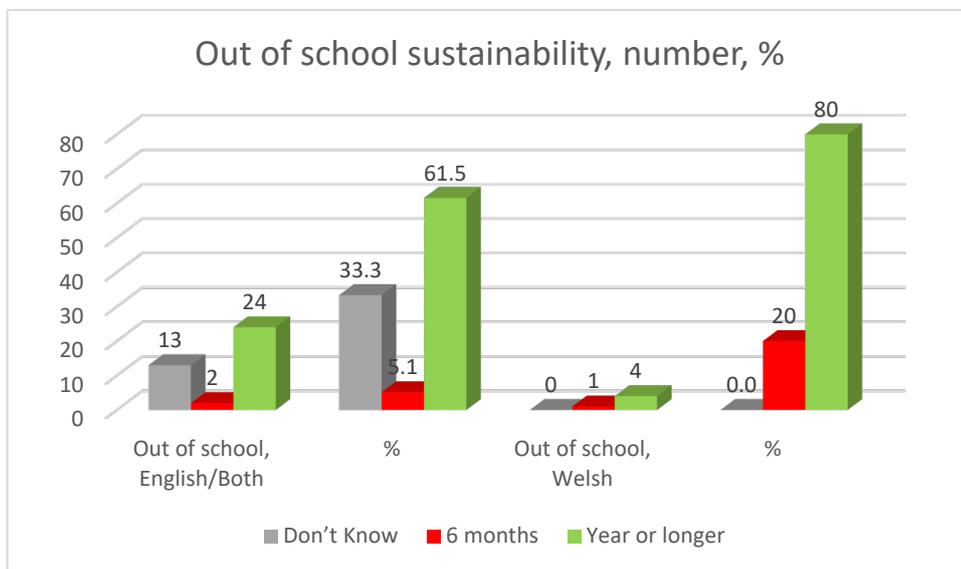
- Predicted financial sustainability for 'English/Both' and Welsh medium were very similar (77.1% and 75%), although care needs to taken as there were only 4 Welsh medium providers
- 5 English/Both settings were only confident in their sustainability for the next 6 months

Out of school (n44)

Table: Out of school sustainability

	Don't Know	6 months	Year or longer	Total
Out of school, English/Both	13	2	24	39
%	33.3	5.1	61.5	
Out of school, Welsh	0	1	4	5
%	0	20	80	

Chart: Out of school sustainability



- A slightly higher percentage of Welsh medium out of school settings reported confidence in viability for a year or longer (80% compared to 61.5%), although care needs to taken as there were only 5 Welsh medium providers
- One Welsh medium setting was only confident of viability for the next 6 months

Open access play; creche

Both settings (one of each type) reported they did not know how long they would be sustainable for.

The Childcare Business Support Team

The Childcare Business Support Team provide new and existing childcare providers with advice, guidance and support to improve the viability and quality of childcare provided. Services can include assistance with policies and procedures, Care Inspectorate for Wales registration applications, marketing, staff recruitment, income generation, sustainability and grant-funding applications.

The team administer the Welsh Government funded grants to support childcare sector sustainability provided via the Childcare and Play Grant and work closely with the Childcare Offer Team, Cardiff Family Advice and Support, Cardiff Flying Start and the Workforce Development and Accredited Centre to ensure childcare providers in Cardiff have access to training, marketing opportunities and can access funding support to improve the quality and sustainability of their provision.

Action: Following the most recent (Q3, Q4 20231-22) additional grant funding provided via the Childcare and Play/Children and Communities Grant, contact providers to generate updated sustainability data for inclusion in the final CSA to be submitted to Welsh Government in June 2022

14. Cross-Border/Geographical

Throughout this CSA the distribution of childcare provision across Cardiff has been broken down by Neighbourhood Planning Areas. As noted in the action plan, in Cardiff East, the NPA with the greatest number of children aged 0-14 per registered childcare place, a further investigation of the local factors influencing demand and supply will be undertaken. However, it should be noted that no service in this NPA appears to have any children awaiting an immediate place.

With regards to Cardiff families accessing childcare or early education outside of the county, 3 respondents to the parental survey (2.17% of respondents) identified they were accessing their early education outside of Cardiff.

The Childcare Offer in Cardiff currently reports that 68 of the 413 settings signed up to provide the Offer are in another local authority area. this represents 16% of settings. However, only one parent (0.74% of respondents to that question) reported accessing their Childcare Offer place outside of Cardiff. It should be noted that it is not possible to ascertain from the data if children attending childcare, or on waiting lists, are from families resident outside of Cardiff.

15. Workforce Development and Training

Staffing levels, turnover, vacancies

Table: Staffing levels, turnover, vacancies, by provider type

	Full day care	Sessional day care	Out of school	Childminders	Open access play	Creche	Totals
No of individual staff currently work in the service	1175	224	306	131	3	5	1844
No of staff working less than 16 hrs per week	47	41	139	14	0	0	241
No of staff that have left the service in last 12 months	216	28	32	1	0	2	279
No of childcare or play posts currently vacant	78	22	10	40	0	0	150
No of childcare or play hours per week these vacancies equate to	2221	469	191	655	0	0	3536
No of staff currently employed on zero hour contracts	66	18	110	6	0	0	200
Do you have difficulty in offering your staff 16 hour or more contracts?	0	0	0	0	0	0	0
Do you undertake Workforce Planning?	0	0	0	0	0	0	0
If you undertake Workforce Planning, how many additional staff do you envisage needing in the next 24 months?	174	18	46	1	0	0	239

- 1,844 people working in childcare were reported via the SASS. Although 185 childminders responded, only 131 are captured above
- A total of 279 staff were reported to have left a service. It is not possible to ascertain if they left the sector or left to take up a different job within childcare.
- There are currently 150 posts vacant, equalling 3,536 weekly childcare hours
- Services that undertake workforce planning have identified they will require 239 members of staff over the next 24 months. It is not clear if these are in addition to the current vacancies of 150 posts.

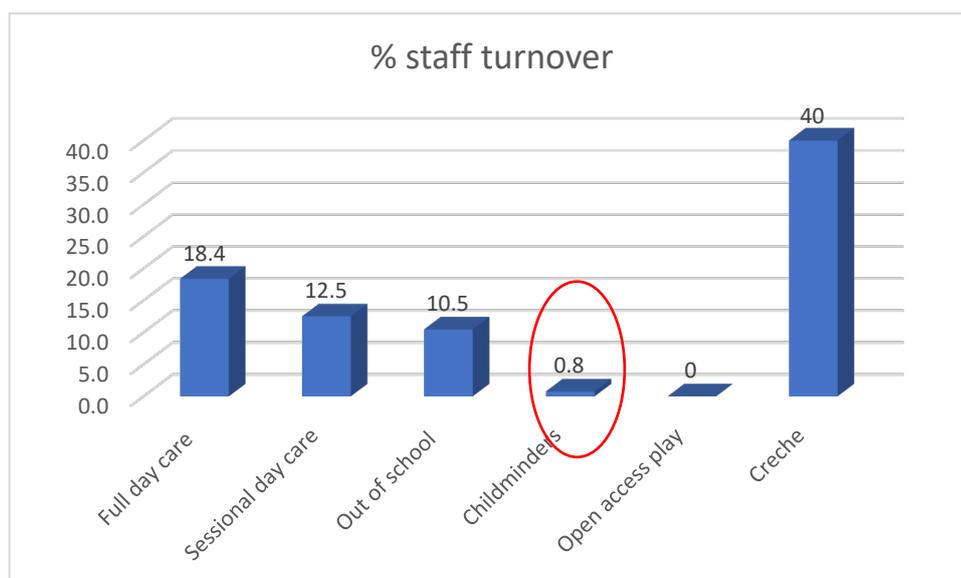
Staff turnover by provider type

Table: Staff turnover by provider type, %

	No of individual staff currently work in the service	No of staff that have left the service in last 12 months	% staff turnover
Full day care	1175	216	18.4
Sessional day care	224	28	12.5
Out of school	306	32	10.5
Childminders	131	1	0.8
Open access play	3	0	0
Creche	5	2	40
Totals	1844	279	15.1

NB: the data relating to childminders is incorrect, as childminders who have ceased trading would not be required to complete a SASS and would therefore not be counted. Other data suggests that between 31.03.2021 and 07.06.2021, 21 childminders ceased operation. The high rate (40%) noted by the creche relates to 2 of the 5 staff leaving in the last 12 months.

Chart: Staff turnover by provider type, %



- Staff turnover rates are highest for full daycare (18.4%), which also employs the most people (1175)

- Of the 270 individuals who have left a service, we are unaware how many are ‘re-cycled’ to other vacancies within the sector, and how many may have left childcare altogether.
- It would appear that with 150 current vacancies, and 50% of the workforce planning demand of $239/2 = 119.5$, around 270 vacancies have been identified over the next 12 months. Again, it is not clear how many of these would need to be people who are new to sector.

Reasons for leaving

For the period June 2020 to June 2021, Cardiff’s Workforce Development Team held information regarding 175 leavers from registered childcare settings, not including childminders. The table below shows the reasons given for leaving. *As the two settings where leavers reported ‘Settings closed’ relate to settings that have re-registered care must taken interpreting this data.

Table: Reasons for leaving, Cardiff WFD (Workforce Development)

Reason	Number
To work at another childcare setting	50
To return to education	3
Family commitments	20
Retirement	9
Moved out of the area	10
Temporary contract ended	4
Setting closed*	4
Left Childcare Profession	39
Unknown	24
Prefer not to say	12
Total	175

Feedback from childcare providers gathered by the Childcare Business Support Team, and the Cwlwm responses in chapter 21 indicate that the sector is facing major recruitment and retention challenges. This is particularly the case for qualified staff, and even more pronounced for Welsh language qualified staff. Contact with other local authority areas would suggest this is a national rather than local issue. This could be a risk to the provision of funded childcare for 2 year olds and the expansion of Welsh medium pre-school childcare to support Cymraeg 2050 and the Cardiff WESP.

Action: Continue to promote childcare as a career of choice through The Cardiff Commitment and Cardiff’s Into Work Service to encourage access to apprenticeships and qualifying training opportunities to young people, unemployed people and individuals from under –represented groups

Staff: Welsh language

NB: The total number of staff reported under this question is lower than the number of staff reported working in settings. Total staff reported working in settings = 1844. Staff reported by language ability = 1807

Table: Welsh language ability of staff, by provider type – English / Both settings

	How many staff are fluent in Welsh?	%	How many staff can speak a fair amount of Welsh?	%	How many staff can speak little or no Welsh?	%
English/Both						
Full day care	84	8.0	143	13.6	828	78.5
Sessional day care	7	3.5	51	25.2	144	71.3
Out of school	30	11.9	24	9.5	199	78.7
Childminders	3	2.6	19	16.2	95	81.2
Open access play	0	0	0	0	3	100
Creche	0	0	0	0	5	100

Table: Welsh language ability of staff, by provider type - Welsh settings

Welsh	How many staff are fluent in Welsh?	%	How many staff can speak a fair amount of Welsh?	%	How many staff can speak little or no Welsh?	%
Full day care	87	84.5	7	6.8	9	8.7
Sessional day care	16	72.7	6	27.3	0	0
Out of school	41	95.3	2	4.7	0	0
Childminders	4	100	0	0	0	0

Chart: Welsh language ability of staff, by provider type – English / Both settings; %

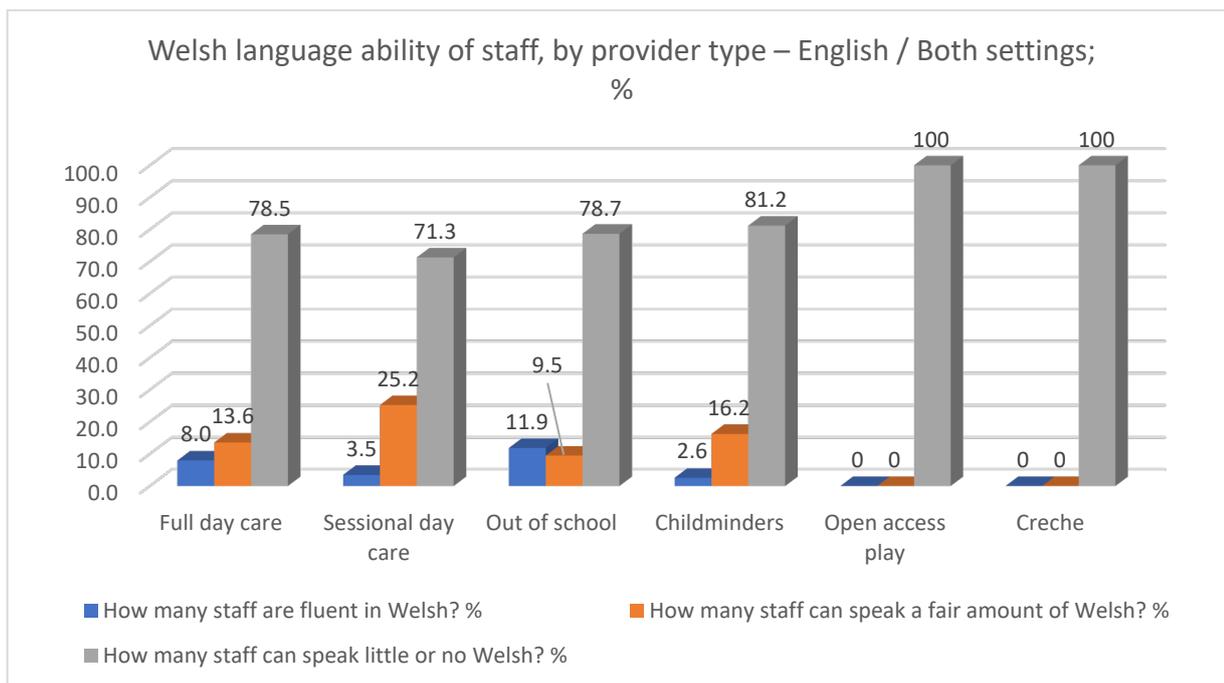
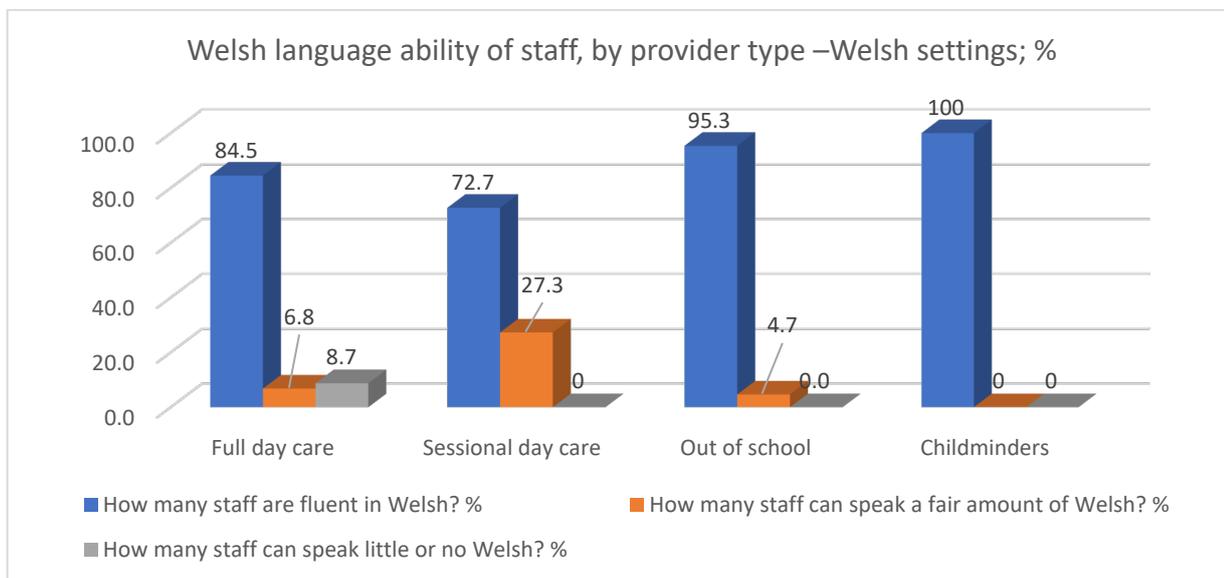


Chart: Welsh language ability of staff, by provider type –Welsh settings; %



- In English / Both settings, between 71.3% (sessional day care) and 81.2% (childminders) of staff report being able to speak ‘little or no Welsh’. The data for creche and open access play settings each relate to only one setting.

- In Welsh medium settings, between 72.7% (sessional day care) and 95.3% (out of school) of staff report being fluent in Welsh.

Action: Signpost the expanded training programme for early years practitioners (increased apprenticeships, the Academi programme and the Croesi'r Bont programme which immerses new practitioners in Welsh) as highlighted in the Cymraeg 2050 2021-2026 Action Plan, in order to increase the number of Welsh speakers within the childcare workforce, especially in English / Both settings.

Action: In order to encourage more childcare worker to use the Welsh language, Cardiff Workforce Development and Accredited Centre will continue to promote the Welsh Government funded Camau entry level course, tailored for the Early Years and Childcare Workforce

16: Consultation responses

Responses from Cwlwm partners

Actions recommended by Cwlwm partners included in the CSA action plan are in bold

Do you have any thoughts on the Childcare Market in each individual Local Authority?	
<p>Clybiau Plant Cymru Kid's Clubs</p>	<p>As the National childcare organisation supporting Out of School Childcare (OSC), our CWLWM partners support early years provision and childminders) are better placed to comment on the sufficiency, quality and affordability of Cardiff. In terms of our knowledge of the OSC in Cardiff:</p> <ul style="list-style-type: none"> • There are a high number of OSC based within day nurseries in Cardiff, but many of these appear to have reduced their capacity for children over the last two years as demand for early years places has increased. This may lead to insufficiency with school age children in some areas • Whilst there are some registered Welsh medium settings within Cardiff, there is still room for growth to support the Cymraeg 2050 goal. Having registered childcare based on school site can be a factor in providing medium education). • There are currently 8 unregistered OSC providers in Cardiff and it would be good to see these become registered to have assurance of quality through regulation, and also to support affordability. • There are a few multi providers of OSC in Cardiff. There is a need to be mindful of the significant gap that can occur when multi-providers go out of business following the impact of Covid-19 • Sustainability is an ongoing concern for the OSC sector, particularly in light of increased WFH following the impact of Covid-19 in terms of childcare sufficiency should providers no longer be able to offer their services. A number of providers are concerned about their ongoing sustainability (see stats within our State of the Sector report, forwarded separately.) • There is a need to explore whether there is a demand for childcare within schools that are currently providing provision. Parents/carers may currently be using unregulated/informal childcare options if there is not registered provision. • Recruitment of qualified staff is of concern and there are a number of providers in Cardiff struggling to meet the ratios required within the National Minimum Standards. This is a concern in terms of ability to remain open and providers being limited in their options when interviewing, which could impact on the quality of provision.

Do you have any thoughts on the Childcare Market in each individual Local Authority? Please refer to the sufficiency of childcare available in your answers.	
<p>Early Years Wales</p>	<p>We have a wide range of members in this county which include Day Nurseries, playgroups, childminders and we are working hard with our members to help them to recover from the impact of Covid on their businesses. We support them with issues from sustainability, recruitment, risk assessments and quality.</p> <p>The sector is currently struggling to recruit and retain qualified staff and this has an impact on quality and capacity. This has resulted in not being able to run at capacity and waiting lists. (This has been noted in the CSA)</p>
<p>Mudiad Meithrin</p>	<p>Generally we cannot generally discuss issues of sufficiency, quality, affordability etc.</p> <p>Our vision as a Mudiad is that every child in Wales should have the opportunity to play, learn and grow through Welsh wherever there are small children in Wales, Mudiad Meithrin (and therefore the Welsh language) should be supported in the areas of Cardiff where Welsh-medium provisions need to be developed. We can all work under Mudiad Meithrin (SAS) scheme which is the Cylch Meithrin development project in response to the 2050 #Cymraeg programme.</p>

	<p>Bilingual provisions should not be combined with immersion provisions in Welsh. Parents need to understand the outcomes for their children and there is a danger here of misleading parents. Global research shows that children learn the language when the language in the home is different to the language of provision/class.</p> <p>We need more confident Welsh-speaking childminders in the county.</p>
National Day Nurseries Association	<p>Covid 19 and the protective measures taken by nurseries has resulted in a considerable lack of income for many settings about the future. Many settings are facing sustainability issues which will have an impact on the future availability of childcare.</p> <p>Recruitment, especially of qualified staff, is a major problem for the sector. Increased staffing costs will impact on the availability of childcare for parents.</p> <p>There is concern that new settings opening on school sites could risk displacing existing childcare places and existing nurseries becoming unsustainable or a larger financial burden on families of younger/unfunded children.</p>
PACEY Cymru	<p>PACEY Cymru do not have the detailed local knowledge of the whole childcare market in Cardiff to comment on the current situation.</p> <p>PACEY Cymru are concerned to note a general decline in the number of childminders across Wales, and in Cardiff over the last five years. In Cardiff we understand there to have been 15 de-registrations in the six months between April 2020 and October 2020. We are also concerned about the low number of new registrations across Wales, in Cardiff there have been 1 new registration in the same period.</p> <p>From April 2021, PACEY Cymru have been focusing on promotion of childminding as a career choice and on addressing the sustainability, childminder numbers and availability of childcare choice for parents.</p>

Improvements for low income families	
Clybiau Plant Cymru Kid's Clubs	<p>Lower paid workers often work atypical shift patterns, and so the lack of availability of registered childcare provision for these families. Work needs to be done to develop, sustain and promote childcare provision that offers atypical hours.</p> <p>Supporting the development of registered childcare, and encouraging the registration of existing childminders in low income families by ensuring they are able to benefit from financial support schemes (e.g. Tax Free Childcare) and the promotion needed about these support schemes too to ensure that families are aware of their availability.</p> <p>Exploration of expansion of existing financial support schemes in terms of eligibility and age ranges to be made on as many families as possible (see additional notes below on this point). Some current schemes have restrictive criteria (e.g. Flying Start which uses postcode as a proxy for eligibility) which therefore exclude some families from access to such opportunities.</p>
Early Years Wales	<p>We support childcare providers to support families to access their services and there have been no issues reported to date. We would welcome using extensions to Flying Start provisions where there is capacity and pockets of need in Flying Start areas.</p>
Mudiad Meithrin	<p>Promote the benefits of wrap-around care and Welsh-medium education - e.g. educational, economic and social. Many families have suffered for generations in a cycle of disadvantage.</p> <p>Ensure accessibility to Welsh-medium education care through the Flying Start scheme.</p>
National Day Nurseries Association	<p>Ensuring families are kept fully informed about the types of childcare and the choices available to them and the financial support available</p>
PACEY Cymru	<p>PACEY Cymru is not aware of any childminders funded to provide either Flying Start or Foundation Phase. PACEY Cymru believes that opportunities to access funding for Flying Start and Early Education for childminding settings should be available to the Local Authority if settings meet defined criteria. We believe that this would ensure parity of opportunities across all types of childminding settings and consideration of parental choice. This is also likely to support better outcomes and continuity of care that meets children's needs linked to well-being. PACEY Cymru understands the need for funding to provide funded services but believes that the outcomes for children should be central to any decisions.</p>

Improvements for families with children with disabilities	
Clybiau Plant Cymru Kid's Clubs	Ensure that there is funding available and support to develop and sustain provision for children with disabilities. We have support to ensure that all childcare provision can be inclusive and accessible (e.g. funding for one to one support).
Early Years Wales	We support childcare providers and practitioners to provide services to all children who access their services. We have support to ensure that all childcare provision can be inclusive and accessible (e.g. funding for one to one support). We have no input into local schemes in this county, however we would like to see more information available via Local Authorities
Mudiad Meithrin	Ensure accessibility to Welsh-medium care and education regardless of each child's disability.
National Day Nurseries Association	Ensuring families are kept fully informed about their choices. A full understanding and training in the needs of children with disabilities on providers.
PACEY Cymru	<p>PACEY Cymru welcome the new ALN system in Wales, which includes provision for children below school age. We will access early information, advice and guidance through the Local Authority Early Years ALN team. We will be looking out more about how this transition period is progressing locally for childminders.</p> <p>In addition, PACEY Cymru believe that Approved Nannies may be an option to support working families with children with disabilities, as they would be caring for children in their own home, and parents can still access childcare vouchers. This would help to ensure parity of opportunities across the sector and consideration of the needs of children to support better outcomes for children through providing continuity of care that meets children's needs. PACEY Cymru believes that the outcomes for children should be central to any decisions made and would welcome working with the Local Authority to discuss potential models of working with nannies to meet the needs of children with disabilities.</p>

Improvements for working families	
Clybiau Plant Cymru Kid's Clubs	<p>Need to ensure that there are sufficient, quality, registered childcare opportunities available for all ages (including before and after school around the school day for older children) and in the language of choice (Welsh/English/bilingual – experience needed) to meet the needs of working parents and children. reflect the 11% gap in provision noted by Arad*)</p> <p><i>*Clarification needed</i></p> <p>Extension of the age range that children can access funded childcare places (e.g. Childcare Offer for Working Families) to address the in-work poverty that some working families experience, and childcare needs are not restricted to school hours. (which in itself needs better promotion to ensure those families who are eligible are using it) has been successful in providing childcare, but the remaining balance can still create financial pressure for working families and prevent them from working longer hours, or opportunities for career progression.</p>

	<p>In the aftermath of Covid-19, it is also essential that the childcare provision that remains open is supported by local families, and that there is sufficient funding and support to prevent unnecessary raising of fees (where applicable) – this includes retaining a community focused ethos when schools/community buildings/local authority providers are used.</p> <p>To continue enabling families to be economically active, there is a need to ensure that there is sufficient childcare provision in every community that needs access. Every community is different, and a choice of childcare provision that meets the needs of the community supports community cohesion (service type, language type, management type).</p> <p>The number of community-led, voluntary run Settings has diminished year on year, particularly impacted by the pandemic (where there is already reduced childcare availability), leading to lower income/rural families being disproportionately impacted. This can hinder their ability to enter/remain/progress in employment (where privately managed provision replaces these settings, it can be more expensive and increase costs).</p> <p>Accessibility and cost of care during the school holidays in particular can be a challenge for working parents. Other initiatives and programs used as unregulated childcare such as sports camps, SHEP, Playworks etc. are often of short-term viability and long-term sustainability of existing Care Inspectorate Wales (CIW) registered settings is at risk if not considered as childcare, unless services collaborate when planning, and unless registered childcare is considered at a priority.</p>
--	--

Improvements for working families	
Early Years Wales	We support childcare providers to provide services for families particularly through the childcare offer in this county.
Mudiad Meithrin	A range of options for childcare including home based childcare, and adequate financial support for Welsh families during school holidays.
National Day Nurseries Association	Ensuring there are sufficient places in full day care settings as these better meet their needs of working families. Improving communication of the Childcare Offer.
PACEY Cymru	<p>Childminders can be well placed to provide quality, flexible childcare for families working atypical hours. Childminders can also care for children from birth up to the age of 14 (or 16 if children have additional needs). They can provide out of school and holiday care, as well as Childcare Offer and Flying Start provision - especially in rural and hard to reach available places.</p> <p>PACEY Cymru believe that Approved Nannies may be an option to support some working families as parents return to work.</p>

Improvements for families seeking work	
Clybiau Plant Cymru Kid's Clubs	Exploration (by WG) of expansion of existing financial support schemes in terms of eligibility to include children under 3. Exploration of expansion in age ranges of children able to access funded childcare (e.g. Childcare Offer) within the 3-4 age range and the brevity of current support may limit employment opportunities for parents. Continued support to continue to be a barrier in parents/carers increasing working hours / progressing in careers / taking up training.
Early Years Wales	We support childcare providers to provide services to families particularly through the childcare offer. We are happy to work with other organisations to help to get messages across.
Mudiad Meithrin	See above

National Day Nurseries Association	Providing financial support with childcare costs for an initial period when a parent starts employment.
PACEY Cymru	PACEY Cymru is working in partnership with JCP, PaCE, Careers Wales and other agencies to create inter... a childminder, which not only provides wider childcare options for families in their local area but support... We welcome the opportunity to work with the Local Authority and partners to promote childminding a

Any other comments	
Clybiau Plant Cymru Kid's Clubs	<p>To meet the needs of local communities, there needs to be effective communication and collaboration b... based childcare (versus community venue-based options) is often preferable for parents/carers and a... (transport).</p> <p>However, access to school sites by childcare providers is often hindered by:</p> <ul style="list-style-type: none"> - Issues with opening up/locking up - Childcare not being sufficiently considered in the planning stages when building new schools - Increasing demand for school places leading to a lack of available room for onsite childcare <p>Continued concerns around Covid-19 and reluctance to allow mixing of year groups</p> <p>Childcare on school sites needs to be considered from the early planning stages, engaging with relev... designed in a CIW registerable way and there needs to be continued partnership working between E... community needs can be met in terms of both education AND childcare. This needs to include cons... able to be based on school-sites to ensure that displacement does not occur.</p> <p>We would like to see a continued commitment to recognise the professional status of the workforce... Early Years Workforce Plan, 2017) and consideration of ways in which pay could be brought in line to... of the professional status of the workforce.</p> <p>Retention/recruitment issues are leading Settings to run at reduced capacity, temporarily close, co... close. Efforts need to be made at a local and National level to encourage people into the sector and... are working in the sector currently.</p>
Early Years Wales	<p>Local Authority websites and social media are an important source of information for parents, carers... are always happy to share information to our members.</p> <p>Families can access Early Years Wales website to find our member settings in their area as well as our... Pages which include guidance to Choosing Childcare.</p> <p>Early Years Wales also offer a range of training and workshops to support the sector as well as some p... available on our websites.</p>

Any other comments	
Mudiad Meithrin	<p>We have done a piece of work 'The Mystery Shopper Project' on the county's website and social websi... • Schools and Learning / Early Years and Chilcare / Find a Nursery or childcare provider – in the... note here that the list also includes Welsh-medium provision, in order to plant the seed, and possibl... Meithrin's provision and a link to the website.</p> <p>•under Schools and Learning / Schools / Benefits of Welsh Medium Education - a useful list of FAQs m... and answer the concerns of non-Welsh-speaking parents about sending their children to Welsh-medium</p>

	<p>does Welsh-medium education do? It sets out Welsh-medium education has a very simple aim - to ensure both Welsh and English while teaching all the other subjects across the curriculum. Young children learn making the most of this potential that Welsh-medium education has become so popular. Is there an opportunity for children start speaking Welsh, the better and to mention CiB, Ti a Fi and the nursery groups so that the link to a Welsh-medium school, and provide a link to the Mudiad Meithrin website?</p> <ul style="list-style-type: none"> •under Schools and Learning / Schools / Applying for a School Place / Nursery School Admissions – it is a time nursery place from the start of the term following their third birthday. They will stay in nursery until their fourth birthday when they start reception class in primary school. <p>Is there an opportunity here to add a sentence to explain that Welsh-medium nurseries are available without being aware of CiB and Ti a Fi, and a link to the Mudiad's website.</p> <ul style="list-style-type: none"> •under Schools and Learning / Schools / Applying for a School Place / Choosing a School – The opening sentence and nurseries etc. It would be useful to mention that Welsh-medium education is available so that parents can start their research. •Bilingual Cardiff comes under the heading Strategies, Plans and Policies. It is a shame that Bilingual Cardiff is not on the website, even on the front page, attaching documents such as the Being Bilingual Booklet, and a link to Welsh Medium Education. <p>Under the heading The Welsh Language in Cardiff (which is at the end), it notes that the main reason for the increase are so many pupils in the Welsh-medium schools and in the last sentence say The city has currently thirty-five primary schools and two Welsh-medium units. There are approximately 4700 pupils in attendance at primary and secondary level. It would be good to be able to add here how many nursery groups/schemes there are that attend them.</p> <ul style="list-style-type: none"> •Cardiff Council – no link to Mudiad Meithrin website. English side – no results at all. Welsh side – 3 on the front page and Learning page. •Facebook – no details of groups/schemes, but post a few stories about schools on its page. •Facebook – look for Cardiff childcare - Cardiff Childcare Offer is coming up and they have shared a Welsh Medium Education link. •Facebook – Cardiff Ti a Fi – sharing a lot of information about the groups/schemes and Welsh for Children and friends. •We looked at Facebook and Instagram also under different areas eg: Childcare and Nurseries Cardiff Bay, Childcare Canton, Childcare Victoria Park, Creigiau Childcare. There are many groups/schemes coming up in this way, but the Flying Start and Childcare 30 websites now come up. The ones that appeared were very low on the list. •It is good that the FIS website mentions MM, but it is a shame that not all the groups/schemes come up. Only the 3 listed under Day Nurseries, as one session can be selected. There are 4 Cardiff groups/schemes not listed at all and these need to be included - Maes y Morfa, Creigiau Childcare. It would also be good to have a link to the Mudiad's website from here. •Under Bilingual Cardiff it would be good to be able to add how many nursery groups/schemes there are that attend them. <ul style="list-style-type: none"> • Website www.childcare.co.uk – Is there an opportunity for all nursery groups to advertise their services? Information, table of what is being offered, costs etc. It would be possible to identify the benefits of learning Welsh in the opening paragraph, in English.
National Day Nurseries Association	No additional comments received
PACEY Cymru	PACEY Cymru feels that the Childcare Sufficiency Assessment is a timely opportunity to consider any issues relating to childminders such as trade waste fees or if there are limits placed by planning on the number of childminders. A planning permission is required. PACEY Cymru believes that the childcare regulatory framework is the appropriate one.

	<p>the maximum number of children being cared for at the property, including those which reside there. P and fees applied by the planning authority for those seeking to establish a home-based childcare service</p> <p>If there are any local issues impacting on childminders please contact PACEY Cymru to discuss further.</p>
--	---

Employers

Colleagues in Cardiff Council's Into Work service distributed an online survey to Cardiff based employers on their database. One response was returned, and responses are show below.

Status of organisation	Private
How many people do you employ in your organisation?	100
Approximately what percentage of your staff live in Cardiff?	0-20%
Approximately what percentage of your workforce are parents with children aged 18 years or under?	41-60%
Do you offer any of the following flexible working arrangements for employees?	Temporarily reduced hours
Please give details of any other flexible working arrangements	Due to the nature of our work, we don't offer flexible working arrangements although we try to be flexible in supporting our workforce.
During the Covid-19 pandemic have you seen a change in the way your employees access flexible working arrangements?	Yes
Please tell us what changes you have seen	Working from home in roles where this has been possible although now colleagues are returning to the workplace on a regular basis.
During the Covid-19 pandemic, what percentage of your workforce accessed the Furlough Scheme?	81-100%
It has been difficult to retain or attract new employees	Disagree
Childcare has been a big factor in preventing employees taking-up employment or continuing to work in the organisation	Disagree
During the Covid-19 Pandemic, childcare has been a big factor in preventing employees taking-up employment or continuing to work in the organisation?	Disagree
Please tell us your experiences of childcare and how it impacts retaining or employing staff	The majority of our workforce work shifts and so manage childcare around this. During the pandemic, all our workforce with the exception of senior management and a small skeleton crew were furloughed which helped workers with families.

Do you think there are sufficient childcare provisions within Cardiff to meet the requirements of your employees?	Unsure
What improvements do you think are needed to childcare to help improve recruitment and retention of staff?	More flexible sessions, e.g. drop ins or a few hours; More affordable; Available at different times;
Which times would work the best?	Before 7am ;After 6pm;
Which locations would work best?	Closer to child's school; Closer to work or study;
Which types of childcare would work best?	Holiday club <i>The above questions won't let me answer all that apply.</i>
How frequently do you experience problems with employees not continuing to work in your organisation following a Maternity/Paternity leave?	Rarely
Please tell us any concerns you have for the current and future childcare market	Childcare is so expensive it is prohibitively costly and many parents leave work for a period to bring up their children. This has to end. At the same time, I appreciate that workers in childcare have to earn a decent salary as the role is so important and as parents we need good quality childcare provision. I would suggest that the government needs to subsidise this to some extent to ensure that the UK offers great career
Childcare vouchers	Have provided in the past but no longer
On-site nursery	No
On-site crèche	No
On-site holiday playscheme	No
On-site after-school club	No
Financial assistance towards childcare	No
Information about childcare provision	Thinking about providing
Information about tax credits	Thinking about providing

Schools

A school-specific survey, along with information about and a link to the parent survey, were sent to all Cardiff schools as part of the weekly email update from the Education department.

17: Gaps Analysis and Areas for Improvement

Gap analysis

From a detailed analysis of the SASS data, and by comparing the number of children waiting for an immediate place against vacancies by service within each NPA, only 99 children were identified as waiting for a place in a service for which there were no vacancies in that NPA. The approach is to assess the sufficiency of *services* by geographical area, rather than focusing on provider types.

Whilst it is recognised that some parents may have preferences for the type of provider they use, for example, an afterschool club, after school care for their school aged child may be provided by an out of school club, a full daycare setting or a childminder. The creation of additional out of school, after school service places in an area where a service is already being provided, and where vacancies exist, is likely to undermine the viability of existing providers due to the need for any setting to reach a 'critical mass' of child attending in order to break even and cover costs.

As noted in the body of the assessment, there are concerns about the accuracy of some of the data drawn from the SASS responses. Consequently, in many cases the initial response generated by the CSA in the Action Plan is to further investigate what level of unmet demand exists, if any. In some cases, whilst the data suggests that there is a waiting list for one service, e.g., Mornings, in Cardiff North, the data also indicates that there are vacancies in the NPA in services that would appear to be very similar e.g., Half Day Care/Half Day Nursery AM. Further work is needed to fully understand if the demand can be absorbed by providers offering these services, or whether timing, children's ages or other factors mean these services are not suitable for the children identified on the waiting lists.

If the unmet demand is verified, the Childcare Business Support Team will work with providers in the area, schools, families and other stakeholders to assess how to best meet this need. Opportunities for existing providers to expand either the number of places, or types of services offered will be the preferred approach, as this should have the least displacement impact and in the longer term, is more sustainable.

Table: Vacancies by service and NPA

NPA	Service	Reported unmet demand (children waiting for an immediate place above current vacancy, by service)	Comments
Cardiff North	Mornings	21	474 vacancies for Half Day Care/Half Day Nursery AM exist in the NPA
	Play scheme sessions	10	Holiday provision – unsure which holiday the waiting list is for
	Playgroup/Cylch Meithrin AM	2	
Cardiff East	No children waiting for any service		
Cardiff South East	No children waiting for any service		
City and Cardiff South	Half Day Care/Half Day Nursery PM	3	
	Playgroup/Cylch Meithrin AM	6	527 Half Day Care/Half Day Nursery AM vacancies
Cardiff South West	Half Day Care/Half Day Nursery AM	23	NB: 36 Morning vacancies
Cardiff West	Full Day Care/Full Day Nursery pl	29	
	Playgroup/Cylch Meithrin AM	5	151 Morning vacancies

- Cardiff North – 21 children waiting for Morning, 10 children waiting for playscheme session, 2 for Playgroup/Cylch Meithrin AM (NB: vacancies exist for Playgroup/Cylch Meithrin PM)
- Cardiff East - No children waiting for any service
- Cardiff South East - No children waiting for any service
- City and Cardiff South – 3 children waiting for Half Day Care/Half Day Nursery PM (NB: 527 Half Day Care/Half Day Nursery AM vacancies). 6 children waiting for Playgroup/Cylch Meithrin AM place
- Cardiff South West - 23 children waiting for a Half Day Care/Half Day Nursery place (NB: 36 Morning vacancies available)
- Cardiff West - Cardiff 29 children waiting for a Full Day Care/Full Day Nursery place (NB: 151 Morning vacancies exist in this NPA). 5 children waiting a Playgroup/Cylch Meithrin AM place (NB: 151 Morning vacancies reported)

(a) childcare provision for children of parents who work atypical hours;

According to SASS data, 162 childcare settings open before 8.00 am on at least some days of the week. 108 childminders operate before 8.00 am, with the earliest starting at 5.50 am. 45 full daycare, 8 out of school and 1 sessional day care provider open before 8.00am, providing 4,080 places.

Care after 6.00 pm is provide by between 4 childminders on a Tuesday, rising to 11 on a Friday. This may be due to childminders flexing their service to meet the needs of parents using their service.

9 full daycare settings also operate after 6.00 pm, with the latest closing at 7.00 pm

NB: the data above is based on reported opening times. The direct responses to the question relating to provision of services after 6.00 pm ('Evenings' on the SASS questionnaire) only identified 8 childminders and 6 full daycare settings who reported providing this service.

4 childminders provide overnight care, and 6 childminders operate at weekends, including one before 8pm and after 6pm on a Saturday.

The parent survey included one comment relating to the lack of flexible childcare for shift workers but is unclear if this relates to opening times of being able to different patterns of childcare to align with changing shifts. A small number of comments were received from parents relating to the opening hours of the childcare they were using, noting that it was sometimes difficult to drop children off and get to work on time, but this is not felt to be a significant gap in provision.

(b) Welsh medium childcare provision;

Based on SASS data, there are 4 Welsh medium childminders, 13 full daycare settings (8 of which provide full daycare i.e., a child can stay at the setting all day), 4 sessional day care and 5 out of school settings. In total, there are 863 Welsh medium registered places in Cardiff.

Childminding

When broken down by NPA, there is one child waiting for an after school place in Cardiff West where no vacancy is reported

Full daycare

When broken down by NPA, there is one child waiting for an after school place in Cardiff South East where no vacancy is reported. In City and Cardiff South one child is reported waiting for an early education place, although no children are recorded as waiting for place by the Education department. Six children are reported waiting for a Cylch Meithrin AM service. In Cardiff West, 25 children appear to be waiting for a full-time nursery place, with 15 waiting for a Cylch Meithrin AM place, and the same number are reported to be waiting for a PM Cylch Meithrin

Sessional day care

Waiting lists only exceed vacancies for Morning provision (20 on waiting list, 12 vacancies = shortfall of 8) in the Cardiff North NPA.

Out of school

Overall, whilst there are 30 reported vacancies for before school, there are 146 children reported as waiting for an immediate after school place, with 95 in Cardiff South West and 30 in Cardiff West. A further 21 children are identified as waiting for a Welsh medium after school place in City and Cardiff South.

Whilst demand above capacity to supply is recorded for Welsh medium after school services in 3 NPAs, further investigation will be required to assess if this data is accurate. For example, one setting reporting an immediate waiting list is registered to provide 400 places per week and has reported an average weekly attendance of around 300 children but reported 95 children waiting for an immediate place. It may be the case that the data relating to 'vacancies' has been transposed into the 'children waiting for an immediate place' column in error.

There are no Welsh medium open access play settings or creches in Cardiff. Although some responses to the parental survey identified challenges finding Welsh medium childcare, there were no specific responses regarding open access play or creche provision. One response noting the use of the Urdd Welsh medium holiday activities was recorded.

As noted in chapter 10: *Welsh medium and WESP*, actions identified in the CSA around Welsh medium childcare align with and contribute to the achievement of the targets in the Cardiff WESP.

(c) childcare provision for different language categories.

As well as English and Welsh, providers reported that the following languages were used in settings: French, Polish, Portuguese, Spanish, Punjabi, Urdu, Bengali, Chinese, Italian and Makaton.

Summary of unmet needs

(a) types of childcare available;

From the SASS data and an assessment of waiting lists and vacancies, on a city-wide basis there appears to nearly be sufficient provision of full daycare, sessional care, out of school and childminders. As noted, a

limited number of services within NPAs appear to have current waiting lists, and actions to further investigate and develop greater capacity if required, have been identified.

Only one open access play provision was identified in the SASS. The service, registered as a creche, does not operate in the manner described in the NMS, in that it provides a term time service, 5 mornings per week, for fee paying, Flying Start and Childcare Offer children.

There are no nannies engaged in the Voluntary Approval Scheme in Cardiff, which removes the ability of any family using a nanny to access financial support via the childcare element of working tax credits or Tax Free Childcare.

There are opportunities, in line with Welsh Government's Cymraeg 2050 policy and the Cardiff WESP, to further develop Welsh medium full daycare, sessional care and Welsh medium childminders

Although a number of parents responding to the parent survey indicated that there was a lack of suitable childcare in their area, Cardiff Family Advice and Support have not reported this issue being raised by parents contacting the service. Equally, whilst some respondents to the parent survey identified a lack of atypical hours provision, 162 settings provide before 8.00 am, and up to 20 after 6.00 pm.

Areas for improvement

- Further investigate locations where services appear to have demand above capacity (waiting lists). If verified, work with local providers to develop additional capacity with minimum displacement impact.
- Further investigate locations where Welsh medium services appear to have demand above capacity (waiting lists). If verified, work with local providers to develop additional capacity with minimum displacement impact.
- Encourage nannies to join the Voluntary Approval Scheme, to support their clients access to financial assistance with childcare costs
- Encourage providers who operate at atypical hours to further market and promote their services

(b) age of children for whom childcare is available;

The SASS data identified 10,951 children on childcare providers books, broken down by the child's age. Although only 268 children under 1 were reported, for 2 year olds this rose to 2,126 (or 52.7% of the cohort) and 2,000 3 year olds (48% of the cohort).

Only 68 children aged over 12 were reported. It may be the case that some of these children have additional needs and that these needs can be met by these providers, but it is not possible

to confirm this from the data available. It would appear there is little demand for childcare for children of this age.

There are no significant areas for improvement.

(c) affordability of childcare;

74.2% (299 of the 403 respondents to this question) strongly agreed that childcare was too expensive, with a further 76 (18.9%) tending to agree. Affordability was also the commonest response category to the Areas for Improvement question in the parent survey, selected by 70.6% of respondents, only 17 responses to this question were received.

Affordability was also highlighted in the narrative responses by a significant number of parents, and it may be the case that the higher costs for childcare for babies under 1 impact on the number of very young children in childcare. Equally, it may be the case that the relatively high numbers of 2, 3 and 4 year olds on childcare providers books are linked to the Welsh Government funded childcare provided through Flying Start and the Childcare Offer.

The impact that the local authority can have on the fees charged to parents for a childcare place is limited. However, ensuring parents are aware of the financial entitlements they could access, dependent on their employment and economic situation, and encouraging providers to sign up for Tax Free Childcare and/or to accept childcare vouchers may help some families with childcare costs. The parent survey identified that nearly half (172 of 401, 42.9%) of parents knew where to find information about financial assistance for childcare.

Areas for improvement

- Continue to provide parents/carers with information of financial assistance with childcare costs via Cardiff Family Advice and Support. The Childcare Business Support Team and Cardiff Family Advice and Support will develop and market an information resource identifying the range of sources of financial assistance with childcare costs.
- Encourage more settings, initially targeting sessional day care, to sign up to provide Tax Free Childcare and/or accept Childcare Vouchers. Only 13 (33.3%) of sessional day care providers are currently signed up, the lowest proportion of any provider type.

(d) times at which childcare is available; and

As noted above, 162 settings provide before 8.00 am, and up to 20 after 6.00 pm.

There are no significant areas for improvement.

(e) location of childcare.

The distribution of childcare across Cardiff, in relation to where there is demand, is generally good. As noted in the action plan, a further investigation of the factors relating to Cardiff East, which has the highest child:registered place ratio for children aged 0-14, will be undertaken.

Areas for improvement

- Given the largest disparity between registered childcare places and numbers of children aged 0-14 exists in Cardiff East, a further investigation of the local factors influencing demand and supply will be undertaken. If required, a local action plan will be developed.

18: Action Plan

19: Explanatory notes

Guide to the CSA

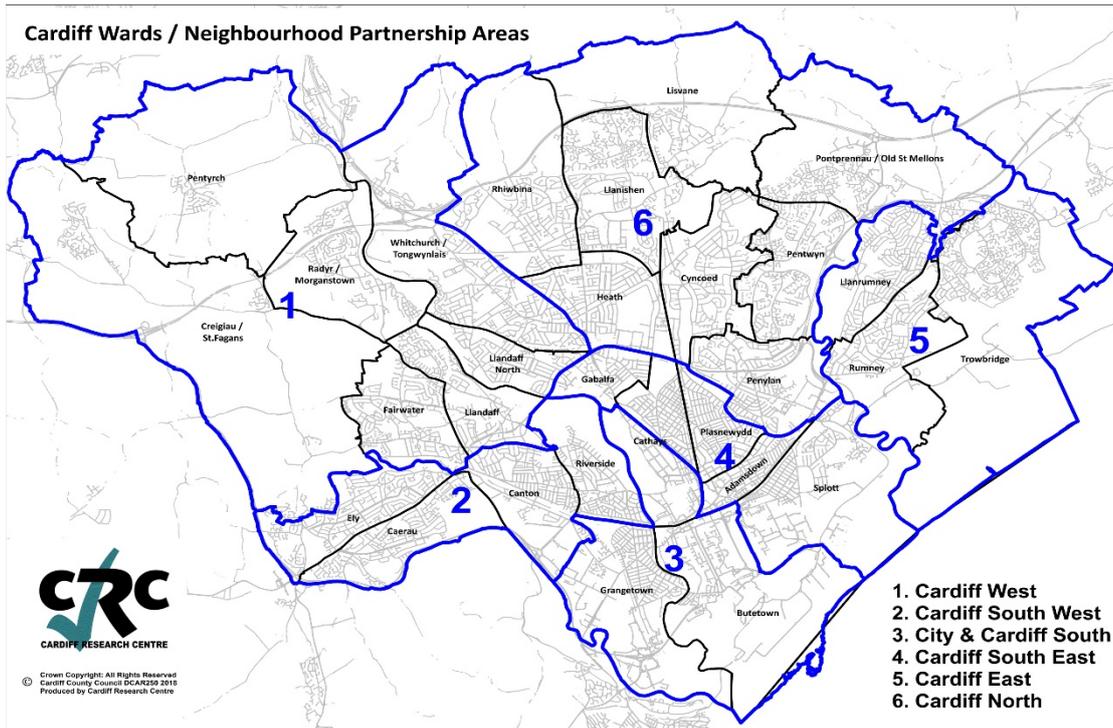
Neighbourhood Planning Areas

A 2013 White Paper, “**Building Communities: A New Approach to Neighbourhood Working**”¹ re-organised the 29 wards into 6 Neighbourhood Partnership Areas, now Neighbourhood Planning Areas (NPAs). The wards in each of these NPAs are set out below and are used throughout the rest of this CSA.

Following completion of the CSA, a ward-by-ward breakdown of childcare supply, demand and key socio-economic factors will be produced as a resource for potential; childcare providers, planners and key stakeholders.

Neighbourhood Planning Area	Wards
Cardiff North	Rhiwbina, Heath, Lisvane, Llanishen, Cyncoed, Penylan, Pentwyn, Pontprennau & Old St. Mellons
Cardiff East	Llanrumney, Rumney, Trowbridge
Cardiff South East	Gabalfa, Cathays (part), Plasnewydd, Adamsdown, Splott
Cardiff City & South	City Centre, Butetown, Grangetown, Cathays (part)
Cardiff South West	Ely, Caerau, Canton, Riverside
Cardiff West	Creigiau / St Fagans, Pentyrch, Radyr & Morganstown, Whitchurch & Tongwynlais, Fairwater, Llandaff, Llandaff North

¹<https://www.cardiffpartnership.co.uk/wp-content/uploads/Final-White-Paper.pdf>



The Active Offer

The Care Inspectorate (CIW), who inspect care services, including registered childcare include in their inspection reports if a service is providing, or working towards providing, the Active Offer.

A Strategic Framework for Promoting the Welsh Language in Health, Social Services and Social Care was published in 2016 by the Deputy Minister for Social Services.

The aim of the framework was to ensure that organisations recognise that language is an intrinsic part of care and that people who need services in Welsh get offered them. This is called the 'Active Offer'. An 'Active Offer' means a service is provided in Welsh without someone having to ask for it.

[More than just words: action plan for Welsh Language in Health, Social Services and Social Care | Care Inspectorate Wales](#)

Data coding

Childcare providers are required to submit data annually to CIW in their Self-Assessment Service Statement (SASS). This information is subsequently shared in an anonymised format with local authorities in order to inform their CSAs.

It has become clear that some of the data submitted by childcare providers is inaccurate (e.g an out of school setting opening at 03.00 and closing at 06.00 hen this should have read 15.00 – 18.00; a childminder charging £1.00 for a whole week’s attendance).

Where these errors (or likely errors) have been identified, given that it is not possible to amend or correct the data, red font has been used in tables, erroneous data circled in red on charts, and comments included at the end of each section containing likely errors.

SASS and Dewis data

As noted above, the majority of data relating to childcare provision (including services provided, fees, attendance levels and vacancies, opening times, etc.) was supplied to local authorities by CIW, after being submitted by childcare providers in their annual SASS.

Dewis Cymru is the all-Wales database established under the Social Services and Well being Wales Act to provide families and professionals with information about services that support well-being. Childcare providers are encouraged to create and maintain a current record on Dewis Cymru of their services. Dewis Cymru is also used as a source of data for the CSA as it can be useful to compare the data held on Dewis Cymru with that supplied via the SASS. As both are reliant on childcare providers entering accurate information, both sources may contain errors. However, cross-referencing the two data sources can prove useful in highlighting both alignment and differences.

Language and terminology utilised

Some data has been presented using headings included in the SASS. For example, *‘children of this age on the books’* refers to children who are on a childcare providers register within pre-set age groups (Under 1, 1 year olds, 2 year olds, 3 year olds , 4 year olds, 5-7 year olds, 8-11 year olds, etc.). Attendance patterns are described as *‘full time; part time or ad hoc’*. Although this terminology may not be in everyday use, it has been decided to utilise the phrases used in the SASS throughout the CSA.

Opening/closing times

The CSA requires reporting on the range of opening hours of providers. In the SASS, and in the CSA, this is reflected in the following manner:

- Earliest opening time (in NPA): the earliest start time of any provider of that type (e.g. childminder)
- Latest opening time: the latest start time of any provider of that type (e.g. childminder)
- Earliest closing time: the earliest finish time of any provider of that type (e.g. childminder)
- Latest closing time: the latest finish time of any provider of that type (e.g. childminder)
- The data also indicates the number of settings open before 8 am, and/or open after 6 pm

It should be noted that the data in each set of responses should be seen as separate. For example, although there may be childminders in an NPA that open at 6.00 am, and childminders that are open until 18.00, this does not necessarily mean that there are childminders who are open from 6.00 am to 18.00.