



Gwybodaeth Teuluoedd, Gofal Plant a Chwarae

Family Information, Childcare and Play



Carmarthenshire County Council

Carmarthenshire Childcare Sufficiency Assessment

2022-27 FULL REPORT

**Disclaimer – Please note this is a 5 year
Assessment, information is subject to change**



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PRINCIPAL STATEMENT

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

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

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

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

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

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

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

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

A handwritten signature in black ink that reads "Gareth Morgans". The script is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Gareth Morgans
Director – Education and Children's Services

1. INTRODUCTION/CONTEXT

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

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

- 1.2 Carmarthenshire County Council has published four full Childcare Sufficiency Assessments to date in 2008, 2011, 2014 and 2017 respectively. Action Plans were developed linked directly to the recommendations that had been made in all four Assessments. These have been reviewed and updated on an annual basis in order to monitor progress made, as will the recommendations contained in this report.
- 1.3 As in 2017, when discussing '**sufficient**' we mean having the right type and quantity of ideally high quality affordable and accessible childcare to meet the needs of parents/carers in Carmarthenshire, including families with children with additional learning needs.
- 1.4 This Assessment also identifies (any) barriers to **childcare provision** experienced by parents from specific backgrounds.
- 1.5 The sufficiency Duty applies to childcare for children 0 to 14 years and extends to age 17 for children with disabilities or Special Education Needs (SEN) – now consistently referred to in Wales as Additional Learning Needs.
- 1.6 The purpose of undertaking an Assessment is **not to oblige Local Authorities to meet the individual childcare needs of every working family**, but to ensure that at a community level, **the Local Authority is taking strategic action with its partners to address gaps in childcare**.
- 1.7 Local Authorities are expected to support the development of childcare where there is sufficient parental demand that a childcare setting or childminder could operate and be sustainable.
- 1.8 The Local Authority is not under a duty to provide the childcare directly. It is intended that formal childcare should in the main be provided by providers in the private and voluntary sectors.

- 1.9 **The cost of childcare will be met by parents**, with parents who are eligible being able to claim universal credit and/or Tax Free Childcare in respect of qualifying registered childcare.
- 1.10 In undertaking the full Childcare Sufficiency Assessment, several types of research were undertaken:
- Analysis of demographic and socio-economic data from the Office of National Statistics, HM Revenue and Customs, Stats Wales, Welsh Government and various Carmarthenshire County Council departments, to give an indication of the profile of factors affecting demand and the ability to pay for childcare in Carmarthenshire.
 - Consultation with 821 local parent/carers via a questionnaire survey undertaken in October 2021 via the Welsh Government
 - Consultation with Carmarthenshire's (a) full day care providers; (b) sessional providers; (c) registered childminders and; (d) out of school childcare providers in November 2021, to supplement analysis of Self-Assessment of Service Statement (SASS) data completed online by 88% of local registered childcare providers for Care Inspectorate Wales (CIW) in June 2021
 - Consultation with children and young people in partnership with colleagues undertaking the 2022 Carmarthenshire Play Sufficiency Assessment
 - Consultation with local employers
 - Consultation with local relevant partners, stakeholders and professionals
 - Analysis of supplementary data derived from a range of additional sources including Care Inspectorate Wales (CIW)
 - Analysis of Family Information Service data.
- 1.11 The standard geography used for small area data in England and Wales are Lower Super Output Areas (LSOA's), which are established from groups of output areas used in the 2011 census. In 2022, there are 112 LSOA's in Carmarthenshire. Much of the data collected at LSOA level can be aggregated to Carmarthenshire Upper Output Areas (UOAs), in order to be able to draw findings and recommendations across border areas. **For the purposes of this Childcare Sufficiency Assessment report, we have used the same six Community Areas in line with the Carmarthenshire Local Well Being Needs Assessment 2021, particularly with the Gaps Analysis Section (15).**

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

The supplementary document also (importantly) states that [the] Welsh Government acknowledges that, given the timing of the full CSA in 2022, **parents may remain uncertain, when asked, about their childcare requirements in the future and that local authorities may need to draw some conclusions based on trends in demand** and on the basis of the best information available to them at the time. Local authorities have the opportunity to take stock of their Action Plan every year as part of their annual reporting on progress and it is recognised that it may be necessary to revisit some of the objectives set out in the 2022 Action Plan in light of further information and developments in respect of the virus.

- 1.13 The 2022 CSA was undertaken by Place Group Ltd supported by the Family Information Childcare and Play Team within Carmarthenshire County Council.
- 1.14 In Wales and England, a number of critical developments were observed, especially during the period April 2020 - February 2022, for example, as evidenced by a report published by Coram and Family Childcare in July 2021. These included:
- Demand for parent-paid hours reduced substantially, especially during the first lockdown and stayed significantly below usual levels even after restrictions changed in June 2020, due to the shift to home working and parents, carers and guardians reducing or stopping employment temporarily (on furlough) or permanently (through unemployment)
 - Demand for paid hours declined more than demand for free entitlement hours - although some Local Authorities also reported declines in demand for funded Flying Start programme hours for 2-3 year-olds

Although there was evidence of relatively few permanent setting closures due to the COVID-19 pandemic, in that time, some LAs observed that it was still important to wait and see what the financial impacts would be once financial supports had been fully withdrawn and the longer term impacts of the pandemic had run their course.

Concerns about the future of the out of school childcare sector were raised, both from the impact of reduced demand from parents, carers and guardians working from home and from continuing delivery challenges i.e. reduced supply.

Significantly, a high number of local authorities believed that there could be permanent changes in parental demand, in formal childcare provision, and therefore with regard to their localised early years and childcare's sustainability.

- 1.15 This CSA has provided an opportunity to determine the extent to which COVID-19 effects have been a factor in each of the Carmarthenshire locality's 112 LSOAs especially from the perspective of the reduction in demand for formal childcare particularly for hours paid for by parents.

Essentially, this 2022 CSA has also been an opportunity to:

- Establish the views of local parents, carers and guardians on early years and childcare, particularly in relation to (their) future demand and specified need(s). This ambition incorporates: (a) the whole local authority area, taking account of trends of (localised) demand and supply and; (b) an identification of specific gaps (through structured mapping) for particular groups/families from specific circumstances, to ensure that there is sufficient childcare - for all families - across the local authority
- Help ensure that local families are able to access childcare locally that meets their needs and enables them to progress their **employability**
- Establish the future supply and demand in relation to the Carmarthenshire Flying Start programme (in 2017, Flying Start purchased 412 childcare places and 331 children were benefitting from free childcare providing a take up rate of 80.3% via this programme), and therefore inform relevant future childcare commissioning arrangements
- Determine the extent to which the COVID-19 pandemic affected: (a) the supply of early years and childcare (aligned to specific localities); (b) the demand for formal childcare and; (c) the sustainability of existing early years and childcare providers
- Identify and action plan measures to pro-actively strengthen, enhance and increase Welsh-medium childcare provision
- Establish the extent to which nannies and alternative home childcare providers are actually employed within the Carmarthenshire locality

- 1.16 In terms of national context, in January 2022, the Welsh Parliament published the report: Minding the future: the childcare barrier facing working parents. Key recommendations of this report were that:

- **The Welsh Government sets out a plan to deliver universal wrap-around care, including after-school clubs that can accommodate all those who want to benefit from them**
- The Welsh Government sets out how it intends to address the eligibility criteria in the Childcare Offer to make it easier for parents employed in atypical hours,

such as insecure work, shift work or on zero-hours contracts, to access provision

- The Welsh Government sets out how it intends to work with local authorities and health boards to improve awareness and understanding of the childcare support available to new parents. Potential approaches could include: writing to new parents or promoting the support available when parents register the birth of their child; and providing information to parents in sufficient time ahead of the end of maternity leave to help them to make informed decisions about childcare
- The Welsh Government sets out plans for addressing the gap in childcare between the end of maternity leave and eligibility for the Childcare Offer
This should include indicative timescales, and an evaluation of the financial and practical factors that would need to be taken into account in addressing this gap
- The Welsh Government sets out plans to place more Welsh-medium childcare on school sites, given that progression from Welsh-medium childcare to Welsh-medium primary education is higher when this occurs
- The Welsh Government sets out in its response its plans to work with local authorities to ensure that Family Information Services provide resources in community languages other than, and in addition to, English and Welsh
- In order to address widespread concerns around the lack of ethnic diversity in the sector, the Welsh Government sets out plans for their new race disparity unit to build an evidence base around the level of ethnic minority representation in the childcare workforce
- The Welsh Government sets out a plan which requires all childcare providers to undertake cultural and diversity awareness training, such as that being developed by Cwlwm, a consortium of five childcare and play providers, and to ensure that it becomes part of continuous professional development within the sector
- The Welsh Government sets out a plan to develop and strengthen the childcare provision for children with additional learning needs, including increasing the amount of funding available through the Childcare Offer for Wales Additional Support Grant to improve provision for children with disabilities and/or additional or complex needs
- The Welsh Government sets out how it will ensure sufficient funding is available in the expansion of the Childcare Offer under the Co-operation Agreement to allow two year olds with additional or complex needs to fully access provision
- The Welsh Government sets out in its response its plan to deliver a sufficient increase in the hourly payment to providers under the Childcare Offer to enable an increase in staff pay, and a timeframe by which all childcare workers will be paid the Real Living Wage, learning from the Scottish Government's incorporation of this into their childcare expansion
- The Welsh Government sets out a plan to ensure that the upcoming childcare recruitment campaign by Social Care Wales reaches and attracts groups such as ethnic minorities and Welsh speakers who are underrepresented in the childcare workforce.

- 1.17 Furthermore in terms of context, secondly the theme of provision for two year olds is now very much on all Welsh local authorities' agenda; as in November 2021, the Welsh Government pledged to effectively extend its Flying Start programme and offer free childcare to all two-year-olds within the next three years and plans to boost Welsh-medium childcare ¹.

Currently, only two-year-olds in Wales from disadvantaged backgrounds can claim 12.5 hours a week of free childcare under the Flying Start programme, however, the Welsh Government and Plaid Cymru unveiled a plan to expand its 'free childcare' element to all two-year-olds.

- 1.18 Thirdly and with regard to that out of school sector in Wales, in autumn 2021, Clybiau Plant Cymru published a report called: Demand for Childcare, and the state of the out of school childcare: re-opening. This report which evolved as an outcome of 2,500 interviews with parents in Wales and consultation with representatives of the out of school recommended that:

- There should be more promotion (from Local Authorities, Welsh Government, CWLWM and other professionals) about the benefits of freely chosen play and use of 'regulated' childcare
- There should ideally continue to be accessible funding opportunities for the childcare sector during the road to the 'new normal'
- There needs to be a holistic approach to current and future policies and priorities, ensuring initiatives do not impact the sustainability of the out of school childcare sector
- Continuous enhancements of quality within the childcare sector need to be supported through continued funded training opportunities.

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

Local Authorities should identify and plan measures to strengthen and expand Welsh-medium childcare provision in the area to ensure a seamless route to Welsh-medium education and ensure that the Family Information Service for parents/carers and prospective parents/carers provides information on the advantages of raising children bilingually and using Welsh in the family home.

¹ <https://gov.wales/sites/default/files/publications/2021-11/cooperation-agreement-2021.pdf>

Additionally, the Welsh Government published statutory guidance on Welsh in Education Strategic Plans (WESPs) on 27 January 2021 [2] which sets out the Welsh Government's expectations in terms of how local authorities, working with key stakeholders, will plan for continuity of Welsh medium education to support their realisation of the vision of a million Welsh speakers by 2050.

Accordingly, Local Authorities are expected to set an overarching 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. In doing so, **Local Authorities should identify and plan measures to strengthen and expand Welsh-medium childcare provision in the area to ensure a seamless route to Welsh-medium education, and ensure that the Family Information Service for parents/carers and prospective parents/carers provides information on the advantages of raising children bilingually and using Welsh in the family home.**

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

https://www.carmarthenshire.gov.wales/media/4227/latestversiongd4830_wesp_strategy5-en.pdf:

Essentially, Carmarthenshire County Council is committed to promoting and facilitating the use of the Welsh language by observing the following principles:

- Welsh medium education is available to all learners, within reasonable travelling distance from their homes
- Learners who have followed the Welsh 1st language programme in the primary phase, will be expected to continue with this programme when transferring to the secondary phase
- To work with other services to promote and increase bilingualism
- Celebrate progress and commitment to developing the Welsh language
- All learners to become proficient in 'two and more' languages
- Learners with additional learning needs receive equal linguistic opportunity.

1.20 Objectives of the local authorities' WESP which have direct relevance to the Childcare Sufficiency Assessment and an accessibility to Welsh-medium childcare include:

- Ensure that every pupil is completely bilingual (and multilingual) when leaving school so that they have the skills to operate as bilingual citizens in their communities, the workplace and beyond/worldwide
- Promote the development of the learners' bilingual skills at every opportunity within formal and informal settings in order that Welsh is used naturally for communicating
- Promote opportunities for parents and the wider family to develop their Welsh language skills so they can support their children's language development
- Provide services that will ensure high quality learning opportunities for all Carmarthenshire's children, young people and adults, and thereby enabling them to achieve their full potential as lifetime learners in the context of the unique bilingual nature of the County
- Ensure that the Welsh language is taught as a 1st language and/or 2nd language in all of our schools, in accordance with the 2002 Education Act, and proactively preparing for the teaching of Welsh as a single continuum by 2020
- Ensure that all pupils are able to speak, read and write the Welsh language fluently by the end of Key Stage 2 in accordance with their expected stage of development
- Ensure progression from pre-school Welsh medium provision to bilingual primary and secondary education
- Ensure that the Welsh language is taught as a 1st language and/or 2nd language in all of Carmarthenshire schools, in accordance with the 2002 Education Act, and proactively preparing for the teaching of Welsh as a single continuum by 2020
- Ensure that all pupils are able to speak, read and write the Welsh language fluently by the end of Key Stage 2 in accordance with their expected stage of development
- Ensure progression from pre-school Welsh medium provision to bilingual primary and secondary education
- Ensure linguistic progression across curricular areas when transferring from Key Stage 2 to Key Stage 3, from Key Stage 3 to Key Stage 4 and promote linguistic progression from Key Stage 4 to lifelong learning
- **Work in partnership with all providers to improve the standard of Welsh within the learning environment.**

1.21 As part of the research that was initiated in order to inform this Childcare Sufficiency Assessment, in autumn 2021, Carmarthenshire County Council invited representatives of setting-based childcare providers to state whether they were happy that their setting had a requisite number of staff with a fluency in the Welsh language. Encouragingly, 96% of relevant childcare providers stated that they were happy and 4% stated that they were not.

Of the early years childcare providers/settings (i.e. full day care providers and sessional providers) who stated that they were not happy, all (five) stated that they were having problems recruiting such Welsh-speaking staff, with these providers most frequently being located in the Llanelli area.

Finally, it can be noted that as part of the research for this Childcare Sufficiency Assessment, parents and carers were invited to feedback about the subject of Welsh medium childcare through a specific e-consultation session which was facilitated in January 2022. Both Welsh speaking parents and English speaking parents gave feedback (2) – and examples of parental (issues-themed) feedback, on the subject of Welsh medium-childcare included:

“I really wanted my child in a Welsh language nursery with wrap around care for the school”.

“The only flexible childminders in my area are non-Welsh speaking and for my family I need a Welsh speaking alternative”.

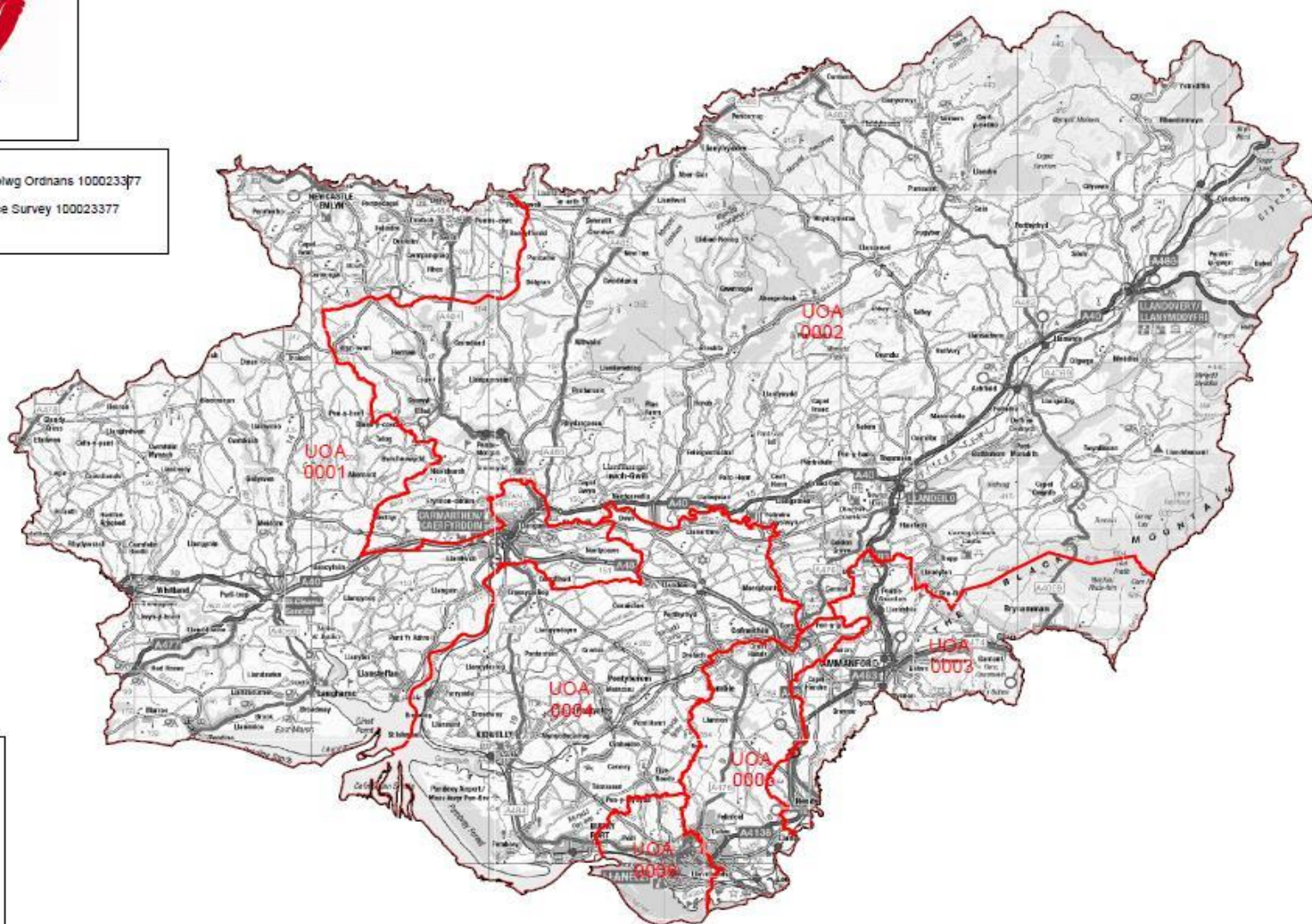
“Flying Start has been marvellous for me and my family, including as the programme is thoughtful when it comes to Welsh-speaking families”.

2 A total of 5 parents attended the e-session.

Carmarthenshire Upper Output Areas (UOAs)

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

Carmarthenshire Upper Output Areas (Geography Boundaries)

- 1.22 This CSA has provided an opportunity to determine the extent to which COVID-19 effects have been a factor in each of the Carmarthenshire locality's 112 LSOAs³ - especially from the perspective of the acknowledged reduction in demand for formal childcare particularly for hours paid for by parents in 2020 and 2021. As in 2017, for the purposes of this assessment, six Carmarthenshire Community Areas have been identified and we call these Community Areas. Below is a breakdown of the wards and general LSOAs in each of the six Community Areas.

Community Area 1 (on map overleaf UOA0001)	Community Area 2 (on map overleaf UOA0002)
Carmarthen Town North	Abergwili
Carmarthen Town South	Carmarthen Town West
Cenarth	Cilycwm
Laugharne	Cynwyl Elfed
Llanboidy	Cynwyl Gaeo
Llangeler	Llandeilo
Llangunnor	Llandovery
Llansteffan	Llanegwad
St Clears	Llanfihangel Ar Arth
Trelech	Llanfihangel Aberbythych
Whitland	Llangadog
	Llanybydder
	Manordeilo & Salem
Community Area 3 (on map overleaf UOA0003)	Community Area 4 (on map overleaf UOA0004)
Ammanford	Burry Port
Betws	Glyn
Garnant	Gorslas
Glanamman	Kidwelly
Hendy	Llanddarog
Llandybie	Llangyndeyrn
Pontamman	Pembrey
Quarter Bach	Pontyberem
Saron	St. Ishmael
Tycroes	Trimsaran
	Burry Port
Community Area 5 (on map overleaf UOA0005)	Community Area 6 (on map overleaf UOA0006)
Bynea	Bigyn
Dafen	Elli
Felinfoel	Glanymor
Llangennech	Hengoed
Llannon	Lliedi
Llwynhendy	Tyisha
Penygroes	
Swiss Valley	
Bynea	

³ LSOAs (Lower-layer Super Output Areas) are small areas designed to be of a similar population size, with an average of approximately 1,500 residents or 650 households. They were produced by the Office for National Statistics for the reporting of small area statistics.

2. PARTNERSHIP WORKING AND CONSULTATION

2.1 A comprehensive bilingual Summary version of this Report and Consultation Response Form was produced for Public Consultation in line with the requirements set out in The Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016.

The Summary version outlined the main findings, childcare gaps identified within the county and recommendations for securing sufficient childcare.

The Summary Report and Consultation Response Form were both placed on the homepage of the Carmarthenshire Family Information Service website and on Carmarthenshire County Council's website.

2.2 The consultation period ran for 28 days from **9th May to 5th June, 2022.**

The following stakeholders and Partnerships/Organisations were invited to respond to the Consultation:

- Children and young people
- Parents and carers
- Grandparents
- Registered and unregistered childcare providers
- Persons representing children, parents or carers and childcare providers
- Persons with an interest in childcare
- Persons representing those with an interest in childcare
- Local employers
- Neighbouring local authorities
- Schools
- Further education colleges
- Mid and West Wales Safeguarding Board and CYSUR Regional Board
- Welsh Medium Education Forum
- Job Centre Plus Offices
- Umbrella Partner Organisations (including Mudiad Meithrin, Early Years Wales and Clybiau Plant Cymru Kids Club)

2.3 The comments received were used to inform the final version of this Report and assisted with developing Carmarthenshire County Council's Childcare Sufficiency Action Plan (2022-2027). (A standalone Consultation Summary Report has been produced as a separate document).

2.4 Carmarthenshire County Council believes that it has consulted widely and with foresight, with regard to the stakeholders and partners that should contribute towards producing a robust 2022 - 2027 Childcare Sufficiency Assessment including given the relative importance of the 2022-2023 Sufficiency Action Plan i.e. and particularly as the local early

years and childcare sector continues to rejuvenate its presence after the challenges presented by the 2020-2022 COVID-19 pandemic and national lockdowns.

3. THE CHILDCARE SUFFICIENCY ASSESSMENT AND LOCAL WELL BEING NEEDS ASSESSMENT

- 3.1 From April 2016 Public Bodies and Public Service Boards across Wales have been required to deliver the duties of the Well-Being of Future Generations (Wales) Act 2015. These duties include significant changes to the way that Local Authorities plan and deliver public services in Wales and require that sustainable development becomes the driving force behind all strategic decisions and the central principle of everything delivered.
- 3.2 Public Service Boards have a collective responsibility for ensuring the well-being needs of the current population are met without compromising the needs of the future population. The Act required Public Service Boards to develop a County Well Being Plan by no later than May 2018. The Plan must outline how the Public Service Boards proposed to use the sustainable development principle to meet the well-being priorities of the communities they support as well as evidencing how their plans contribute towards the seven national well-being goals of:
1. A prosperous Wales
 2. A resilient Wales
 3. A healthier Wales
 4. A more equal Wales
 5. A Wales of cohesive communities
 6. A Wales of vibrant culture and thriving Welsh language
 7. A globally responsible Wales
- 3.3 The Carmarthenshire 2021 Assessment of Wellbeing can be viewed at: <https://www.thecarmarthenshirewewant.wales/media/jkcbckz0/draft-assessment-of-local-well-being-2021.pdf>

The document outlines that from the perspective of childhood in Carmarthenshire:

- Children were impacted by not seeing their friends or extended families during COVID-19 lockdowns
- There has been an increase in children classified as 'children in need' by social services
- This is likely exacerbated by pressures exerted on families by the COVID-19 pandemic
- Almost a third of children are living in poverty

- Parents and carers have identified that the cost of childcare can be prohibitive
- 3.4 The Assessment of Wellbeing incorporates a section on childcare provision and reflects on how the theme of childcare: *“has come to the forefront as some parents’ needs have changed due to the impact of the pandemic. With more people now working from home, this could change the demand for and desired location of their childcare”*.
- 3.5 Aptly, the Assessment of Wellbeing conclude that: *“as well as ensuring children have an equal start in life, it is also important that families, communities and services work to ensure each child has the best possible start in life, equipping them with the right tools to develop themselves into thriving children, young people and eventually adults”*.
- 3.6 Additionally, the Carmarthenshire County Council live Wellbeing objectives which can be viewed at: <https://www.carmarthenshire.gov.wales/home/council-democracy/consultation-performance/well-being-objectives/#.YheAW5PP3PA>. They incorporate a commitment to give local children and young people the best start in life, aligned to a number of relevant objectives i.e.:

Wellbeing objective 1: Help to give every child the best start in life and improve their early life experiences

This objective commits to giving every child the best start in life and ensure development throughout early childhood; and ensuring that children with complex needs and disabilities and their families get the right support to enable them to participate as fully as possible in their communities.

The CSA, and its associated Action Plan, will help local partners realise this objective through ensuring that all families that wish to access formal childcare, and early years education - including those with additional learning needs – are [en]able[d] to do so.

Wellbeing objective 2: Help children live healthy lifestyles

This objective recognises that living healthy lives allows children to fulfil their potential and meet education aspirations.

The CSA will help local partners realise this objective through ensuring that action planning will be ongoing to ensure that children and families from disadvantaged communities can access the types of advice and support – including through the Flying Start programme – that will reinforce a healthy upbringing and (best) start for life.

Wellbeing objective 3: Support and improve progress, achievement and outcomes for all learners

This objective aspires to want all of local children and young people to have the best possible start in life by supporting them to gain the skills and knowledge they need to lead happy, healthy, fulfilling lives.

The CSA will help local partners realise this objective through its action planning theme of ensuring promotion and communication of forthcoming extended programmes that will see:

- (a) universal free childcare for all two year olds and;
- (b) the Childcare Offer programme being extended for more families to access.

Wellbeing objective 4: Tackle poverty by doing all we can to prevent it, help people into work and improve the lives of those living in poverty

This objective acknowledges how poverty can be a barrier to full participation in society and is too often an intergenerational experience which poses a significant threat to experiencing positive well-being both now and in the future.

The CSA will help local partners realise this objective through, once again, showing a commitment, through its Action Plan to ensure that families that can access funded childcare programmes have a requisite awareness of this ability.

Wellbeing objective 5: Create more jobs and growth throughout the county

Objective 5 recognises how providing secure and well-paid jobs for local people is central to everything local partners are seeking to achieve

Increasing employability is fundamental to tackling poverty, reducing inequalities and has a dramatic impact on our health and ability to function in everyday society.

This CSA progresses to outline how childcare can act as a barrier to employability, and helping to mitigate this evidenced factor will be a key priority for the period 2022-2023 and onward to 2027.

4. POPULATION AND DEMOGRAPHICS

Factors Affecting Demand and Ability to pay

- 4.1 An understanding of the demographic structure of the County is important in identifying factors that will influence the demand for childcare.
- 4.2 The statistics used in this section are derived from specific sources, including StatsWales and the Office of National Statistics.
The data provides valuable information on the age structure of child population at a local level.

The demographic information is in line with the information captured by Public Service Boards in developing their Local Well-Being Needs Assessments.

Population Density

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

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

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

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

Live Birth Rates

- 4.5 In terms of birth rates for the Carmarthenshire locality, Table 1 below details metrics in each of the localities wards (rather than LSOAs) for the year 2019 – i.e., children who will now be of (or approaching) Flying Start and funded childcare programme age.

Table 1 – Year 2019 birth rates for the Carmarthenshire locality

Ward name	2019 Births of residents
Abergwili	15
Carmarthen Town North	80
Carmarthen Town South	45
Carmarthen Town West	65
Cenarth	23
Llanegwad	15
Llanfihangel-ar-Arth	32
Llangeler	26
Llangunnor	19
Llangyndeyrn	32
Llanybydder	18
Llansteffan	16
St. Clears	31
St. Ishmael	12
Trelech	21
Whitland	26
Ammanford	21
Betws	22
Cilycwm	7
Cynwyl Elfed	18
Cynwyl Gaeo	11
Garnant	28
Glanamman	23
Laugharne Township	14
Llanboidy	14
Llanddarog	17
Llandeilo	16
Llandovery	15
Llanfihangel Aberbythych	8
Llangadog	9
Llwynhendy	45
Manordeilo and Salem	5
Penygroes	30
Pontamman	20
Quarter Bach	28
Saron	42
Bigyn	71
Burry Port	27
Dafen	21
Elli	16
Felinfoel	21
Glanymor	60
Glyn	14
Gorslas	67
Hendy	29

Ward name	2019 Births of residents
Hengoed	39
Kidwelly	19
Llandybie	33
Llannon	45
Lliedi	45
Pembrey	21
Pontyberem	28
Swiss Valley	19
Trimsaran	28
Tycroes	26
Tyisha	43
Bynea	60
Llangennech	55
Totals	1,656

Source: ONS 2020

Table 1 indicates that the area with the highest number of new births pre-pandemic was Carmarthen Town North, followed in (equal) frequency by the area of Bigyn and then the area of Gorslas.

Migration

- 4.6 Table 2 shows inflow migration and outflow migration aligned to the Carmarthenshire locality for the period 2019-2020. Table 2 indicates that inflow, in particular international inflow was higher than outflow of people. Previous years had shown an identical incidence and the proportion of inflow in comparison to outflow had been increasing year-to-year.

Table 2 – inflow migration and outflow migration figures aligned to the Carmarthenshire locality for the period 2019-20.

	Mid 2019 – Mid 2020				
Carmarthenshire	Mid-2019 Pop Estimate = 188,771	Long-term International Migration		Internal Migration (within UK)	
		Inflow	Outflow	Inflow	Outflow
		431	265	7,409	5,919
	Mid-2020 Pop Estimate = 190,073	Long-term International Migration		Internal Migration (within UK)	
		Inflow	Outflow	Inflow	Outflow
		394	207	6,609	4,847

Source: ONS 2019

Ethnicity

- 4.7 In terms of ethnicity, Table 3 indicates the number of children who were resident in the locality in 2019 from specific backgrounds.

Table 3 - number of children and young people resident in the Carmarthenshire locality in 2019 from specific ethnic backgrounds

Age	White	White British	Mixed	Asian	Black	Other
0	1,689	1,645	33	28	0	5
1	1,783	1,737	35	29	0	5
2	1,841	1,793	36	30	0	5
3	1,915	1,865	37	32	0	6
4	1,903	1,852	37	32	0	6
5	1,950	1,898	38	32	0	6
6	1,981	1,929	39	32	0	6
7	2,133	2,077	42	35	0	6
8	2,226	2,167	44	37	0	7
9	2,191	2,096	29	27	3	2
10	2,030	1,960	37	32	4	5
11	2,189	2,133	33	35	4	3
12	2,160	2,120	38	37	6	6
13	2,082	2,040	39	28	5	4
14	2,023	1,980	32	35	5	4

Source: ONS 2019

- 4.8 The Carmarthenshire Gypsy Travellers Accommodation Needs Assessment 2019 outlined that Gypsy and traveller families are more likely to have dependent children (45%) than other families (29%).

Number of working households with dependent children

Households and Families

- 4.9 The 2011 Census shows that there were 78,829 households in Carmarthenshire compared to 73,112 households in 2001. This was a 7.8% increase in 10 years. As of the time of writing, there is an expectation that headline outcomes of the 2021 ONS Census will be released and analysable for sufficiency planners in the county in mid-spring 2022. Essentially, the rise in the number of households may further increase the number of those looking for childcare provision.

The 2018 Welsh Government Statistical Bulletin reported that the Carmarthenshire locality accounted for the 10th highest percentage (compared with other local authorities) of children that were resident in workless households – at 17.8% of all households.

Employment

- 4.10 As always, the employment status of parents will be an important determinant of the demand for childcare.

Data published by NOMIS in autumn 2021, indicates that the average weekly wage for a full-time employee who is resident in the Carmarthenshire locality is £566.90 gross, which (is lower than and) can be contrasted with the average for Wales which is £570.60 gross per week.

In terms of employment and unemployment rates across the Carmarthenshire locality, in September 2021, 71.3% of the adult population were classified as economically active and in employment. This was 4.7% less than the average across all Welsh local authorities.

Data published by NOMIS in autumn 2021 also indicated that the five types of occupation which adults were most frequently employed in were (in order of frequency):

1. Human Health and Social Work Activities
2. Wholesale and Retail Trade
3. Manufacturing
4. Education
5. Public administration

Throughout Wales there has been a growing trend with regard to the incidence of shift working. For example the Wales TUC Cymru published a report in late 2019 that highlighted how:

- There were 17,000 more night workers in Wales than there were in 2014
- There were 165,000 people regularly working nights in Wales - 13% of the workforce
- In the UK, care workers (432,000) accounted for the majority of night workers, followed by nurses and midwives (232,000)
- The next most common profession for night workers was road transport drivers (208,000)
- Wales has the third highest share of workers doing night work, compared with the other eleven UK regions.

- 4.11 In 2018, the Stats Wales data repository reported that 8.3% of households in the Carmarthenshire locality were lone parent families.

This was (only) 0.1% higher than the average for Wales.

4.12 It should also be noted that certain students require suitable childcare to help facilitate their ability to study. In September 2021, there were 9,000 students resident across Carmarthenshire, which represented 29.6% of the county population. This was 2.6% higher than the average for Wales.

Number of low income families

4.13 In 2017, 36% of households across the county were said to be living in poverty based on the Welsh Government definition of poverty as *“households with less than 60% of the GB median income”*, making Carmarthenshire levels the 8th highest in Wales. At 14.8% the number of children living in workless households is slightly higher than the Welsh average of 14.6%.

In 2021, a slightly lower percentage, 33.8% (27,691) of households in Carmarthenshire were defined as living in poverty, the 13th highest in Wales (with the Welsh average being 32.9%).

Subsequently, according to the 2019 Welsh Index of Multiple Deprivation (WIMD) which is the official measure of relative deprivation for small areas in Wales, Carmarthenshire has 3 areas within the 100 most deprived areas in Wales.

These are Tyisha ranked as 17th most deprived area in Wales, followed by Glanymor in 68th and Bigyn in 84th position.

Wards that also feature in the WIMD are Hengoed and Elli.

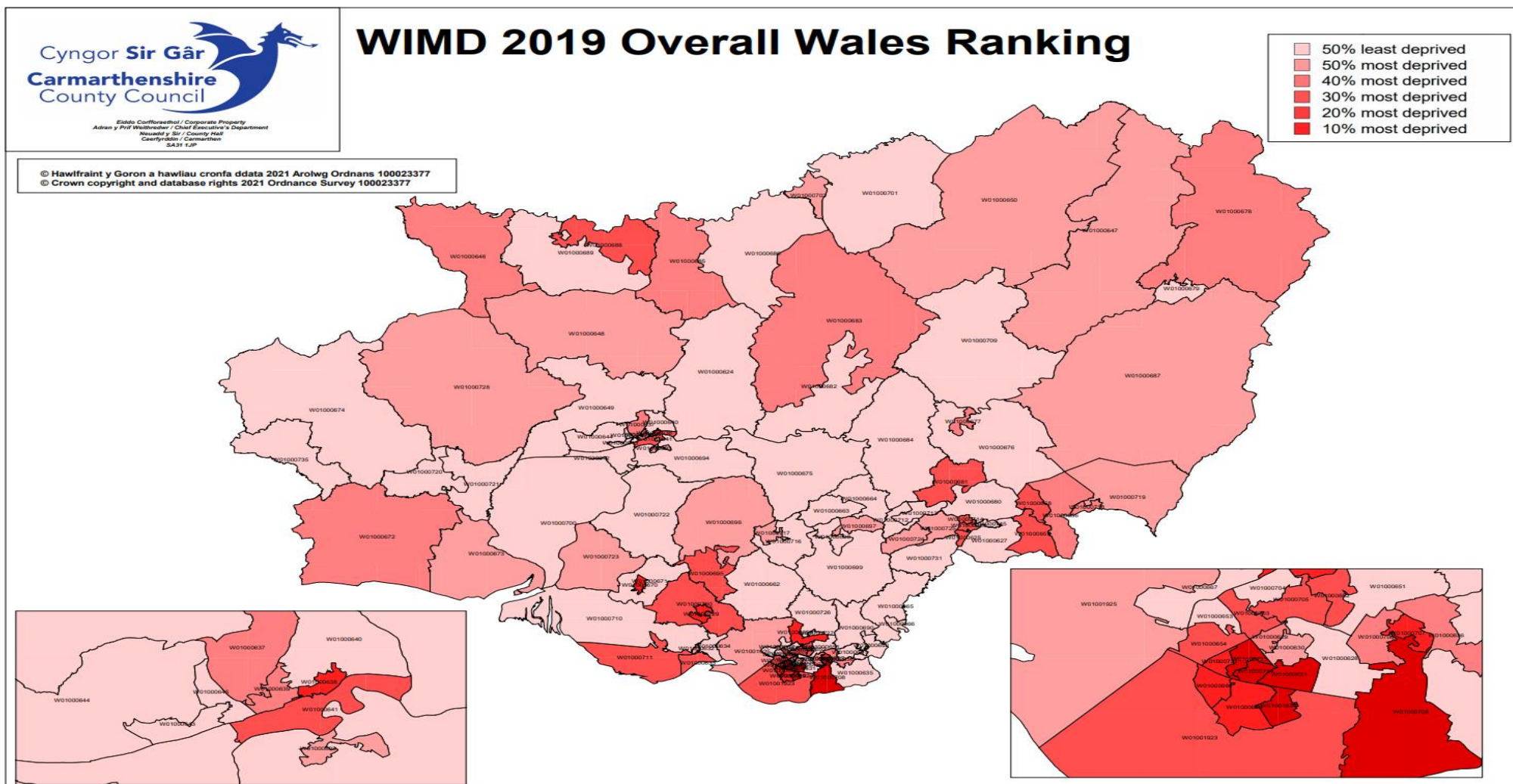
Additionally, during 2019, 27,576 households in Carmarthenshire were classed as living in poverty and indeed, children living in poverty is increasing 31.3% (almost 10,500) of children in Carmarthenshire were living in poverty in 2020, compared to 29.3% (9,720) in 2018/19.

Essentially, the Carmarthenshire Assessment of Wellbeing 2021 also outlines how:

- During 2020, 27,691 households in Carmarthenshire were classed as living in poverty which was a slight increase on the previous year of 27,576
- In 2020, 31.3% of children aged up to 15 were living in households with less than 60% of the average income before housing costs
- This was just above the Welsh average of 30.6%. An increasing trend has been seen over the last six years and our levels have remained higher than the Welsh average each year
- Two wards – Tyisha and Glanymor – were in the top 20 worst wards for childhood poverty in Wales, both at 41.3%. The number of children living in workless households is 8.8%; a rate which has seen significant annual reductions in recent years from over 15% in 2015

- This is a positive trend with more households seeing parents in employment but should not be treated in isolation of the fact that more children are living in poverty within our county, regionally and nationally in Wales.

Fig. 1 - Welsh Index of Multiple Deprivation 2019 – Carmarthenshire



Vulnerable children

- 4.14 In September 2016, there were 215 Looked after Children resident in the county. The amount had decreased by 65 to 150 in March 2021.

Table 4 - Children in Carmarthenshire in March 2021 who were Looked After (LAC)

Children with one or more placements during a year				
	Children with one placement in the year	Children with two placements during the year	Children with three or more placements during the year	Total
Carmarthenshire	115	30	5	150

Source: StatsWales

- 4.15 Additionally, the most up-to-date figure available from StatsWales indicate, in Table 5 below, the number of children on the Child Protection register in the County in 2019, pre-COVID-19.

Table 5 - Children in Carmarthenshire on the Child Protection register (2019)

	Aged under 1	Aged 1 – 4 years	Aged 5 – 9 years	Aged 10 – 15 years	Aged 16-18 years	Total
Carmarthenshire	n/a	20	25	25	n/a	70

Source: StatsWales

Number of Welsh language speakers and learners

- 4.16 It is important that all local authorities identify any possible shortfall in the provision of childcare in the Welsh language. Parents continue to choose to educate their children through the medium of Welsh and many place a great deal of importance on the use of the Welsh language. The demand for Welsh childcare provision is likely to continue to increase accordingly up to 2027. The last comprehensive survey of the Welsh language published was the Census of Population 2011, however figures for the Census of 2021 are due to be published in 2022. Essentially, in 2011, the proportion of Welsh speakers in Carmarthenshire (43.9%) was one of the highest in Wales.

The number of Welsh speakers in Carmarthenshire was exceeded only by Gwynedd (65%), the Isle of Anglesey (57%) and Ceredigion (47%).

In 2021, Carmarthenshire still has a relatively high number of Welsh speakers, with approximately 55% of residents (according to StatsWales) being able to speak Welsh, (again) the 4th highest percentage in Wales, which equates to 84,400 speakers.

In addition, the ONS Annual Population Survey sample-based estimates on the number of self-proclaimed Welsh speakers can be viewed in Table 6 below.

It shows estimates for the percentage of people who say they can speak Welsh at the time of each survey, from June 2016 onwards – and shows an increasing trend.

Table 6 - Trend for Welsh speakers resident in the Carmarthenshire locality

Area	% Jun 2016	% Sep 2016	% Dec 2016	% Mar 2017	% Jun 2017	% July 2019
Carmarthenshire	46.9%	48.8%	50%	50.8%	50.5%	53.3%

Source: StatsWales

4.17 It is important to note that attempts continue to be made to ensure a choice for parents and offer equal opportunities by funding places for children within the provisions of voluntary and private organisations, such as Mudiad Meithrin, Cylch Ti a Fi or Early Years Wales, in line with Local Authority guidelines.

4.18 Table 7 indicates why Welsh-medium childcare provision has a relative and growing importance – aligned to figures it itself presents.

Table 7 - Pupils taught Welsh as a first language in primary, middle and secondary schools in year groups 1-11 in Carmarthenshire

	2015-2016 No. of pupils	2016-2017 No. of pupils	2017-2018 No. of pupils	2018-2019 No. of pupils	2019-2020 No. of pupils	2020-2021 No. of pupils
Carmarthenshire	10,599	10,647	10,677	10,825	10,906	10,979

Source: StatsWales

Number of children with additional learning needs

- 4.19 Table 8 outlines the incidence of children with additional learning needs that were resident across the Carmarthenshire locality in the period 2020-2021 with the subsequent Table 9 outlining the incidence of specific types of additional learning needs during that period.

Table 8 - Incidence of children with ALN in Carmarthenshire in 2020-2021

Location	All Additional Learning Needs				All Special Educational Needs/ALN
	Statemented	Total: Special Educational Needs but no Statement of SEN		Total: Special Educational Needs but no Statement of SEN	
		School Action	School Action Plus		
Wales	14,082	46,790	31,816	78,606	92,688
Carmarthenshire	719	4,079	2,360	6,439	7,158

Source: StatsWales

Table 9 - Incidence of pupils in primary, middle and secondary schools with ALN in Carmarthenshire in 2020-2021

Medium	ALN Type	Carmarthenshire total incidence of pupils
Welsh Medium Schools	Moderate learning difficulties	45
	General learning difficulties	35
	Severe learning difficulties	75
	Profound & multiple learning difficulties	20
	Dyslexia	10
	Dyscalculia	0
	Dyspraxia	0
	Attention Deficit Hyperactivity Disorder	15
	Autistic Spectrum Disorders	90
	Physical and medical difficulties	70
	Hearing impairment	15
	Visual impairment	15
	Multi-sensory impairment	0
	Speech, language communication difficulties	155
	Behavioural, emotional and social difficulties	75
English medium	Moderate learning difficulties	35
	General learning difficulties	25
	Severe learning difficulties	60
	Profound & multiple learning difficulties	20

ALN Type	Carmarthenshire total incidence of pupils
Dyslexia	5
Dyscalculia	0
Dyspraxia	10
Attention Deficit Hyperactivity Disorder	15
Autistic Spectrum Disorders	85
Physical and medical difficulties	55
Hearing impairment	15
Visual impairment	15
Multi-sensory impairment	0
Speech, language communication difficulties	100
Behavioural, emotional and social difficulties	60

Source: StatsWales

Housing

- 4.20 The scale of future housing development across the county continues to have an important impact on the demand for childcare. The new planned housing developments over the next five years will have an impact on the overall demand for childcare, however this is very difficult to predict and largely depends on the demographic of the new residents and the areas which are likely to be developed.
- 4.21 The Carmarthenshire County Council Local Development Plan and its Annual Monitoring Report outlines details on new housing developments and dwelling yields which are planned to be constructed during the period 2022 onwards⁴.

Subsequently, Table 10 shows the number of intended new dwellings for the period 2021-2026 and the number of intended (to be constructed and occupied) new dwellings beyond the year 2026, as set out in the Local Development Plan Annual Monitoring Report.

The Table also intends to demonstrate how many new early years childcare places each (new) development/site could require to be established aligned to the Carmarthenshire County Council's internal formula for new early years places per 100 new dwellings, which is 0.04 places/100 dwellings.

⁴ see: <https://www.carmarthenshire.gov.wales/media/1226872/final-annual-monitoring-report-2019-20-21.pdf>

Table 10 - New Housing Developments and resulting yields of new childcare

Locality	Site Name	Proposed Number of New Dwellings 2021-2026	Resulting Number of new places for early years required aligned to CCC housing yield formula/year 0.04 X 100 dwellings...	Proposed Number of New Dwellings Beyond 2026	[Beyond 2026] Resulting Number of new places for early years required aligned to CCC housing yield formula/year
Ammanford	Former Betws Colliery	0	6	66	17
	Land adj Penygroes Road, Blaenau	0		16	
	Land at Gwynfryn Fawr	90		0	
	Land at rear of 16-20 & 24-30 Betws Road	9		0	
	Land off Colonel Road, Betws	0		5	
	Land opposite Plough & Harrow	0		9	
	Lon Ger y Coed, Wernoleu Road	0		14	
	North of Church Street	0		27	
	Residential Caravan Park	9		0	
	Tirychen Farm	30		259	
	Viji Garage, High Street	0		20	
	Yr Hen Felin, Pontamman Road	8		0	
	Ammanford Totals	146		416	
Brechfa	Adj Maesygroes	0	0	20	1
Brechfa Totals		n/a		20	
Brynamman	Adj Cwm Nant Moel	0	1	65	4
	Ardwyn Road	8		0	
	Land adjacent 53 Station Road	0		22	
	Mountain Road, Pt Encl 7868	0		7	
	Rear of 111-115 Cwmgarw Road	0		7	
Brynamman Totals		8		101	
Burry Port	Bay View, Graig	0	6	9	4
	Burry Port Harbourside	0		134	
	Dyfatty North	0		40	
	Dyfatty South	0		20	
	Glanmor Terrace	32		0	
	Gwdig Farm (Pen y Porth)	105		0	
	Heol Waun Wen	0		10	
	Sea View Public House	10		0	
	Site 4 Burry Port Harbour East	0		20	
Burry Port Totals		147		90	
Caeo	Land west of Rock Street	0	0	8	1
Caeo Totals		0		8	
Capel Dewi	Llwynddewi Road	6	1	0	0
Capel Dewi Totals		6		0	
Capel Hendre	Adj Lllys Newydd Elderly Persons Home	0	1	25	1
	Delfryn Estate	15		0	
Capel Hendre Totals		15		25	

Capel Iwan	Adjacent Pleasant View	5	1	0	1
	Maes y Bryn	0		13	
Capel Iwan Totals		5		13	
Carmarthen	113 Priory Street	37	13	0	37
	40 Heol Spilman	8		0	
	Ashgrove/40 Heol Spilman	8		20	
	Former BT Exchange Building	0		14	
	Former Cartref Tawelan	18		0	
	Former Coach Depot, Abergwili	0		9	
	Former Health Authority Buildings,	8		0	
	Former MAFF Depot	0		7	
	Land south of Pant Glas	0		13	
	Parc-y-Delyn	0		35	
	Penybont Farm, Llysonnen Road	0		9	
	Penymorfa	0		180	
	Rear of Bronwydd Road South	15		0	
	Springfield Road	29		0	
	West Carmarthen (Commitment)	200		646	
Carmarthen Totals		323		933	
Carmel	Adjacent Erwas and Erwlon	0	0	10	1
Carmel Totals		0		10	
Cross Hands	53 Carmarthen Road	0	1	68	8
	Adj Cefneithin Road	0		25	
	Adj Pantgwyn	0		65	
	Land adjacent to Maesyrfhaf	9		9	
	Land to the rear of Gwernllwyn	0		29	
Cross Hands Totals		9		196	
Cwmann	Heol Hathren	0	0	12	1.5
	Rear of Post Office	0		20	
Cwmann Totals		0		32	
Cwmffrwd	Adjacent to Ffrwdwen	18	1	5	1
Totals		18		5	
Cwmgwili	Heathfield Industrial Estate	0	0	30	1
Totals		0		30	
Cymifor	Opp. Village Hall	0	0	30	1
Totals		0		30	
Cwrt Henri	Land adjacent Glasfryn Court	0	0	16	16
Totals		0		16	
Cynghordy	Adj Bronhaul	0	0	22	1
	Land at Bronhaul	0		7	
Totals		0		29	

Locality	Site Name	Proposed Number of New Dwellings 2021-2026	Resulting Number of new places for early years required aligned to CCC housing yield formula/year 0.04 X 100 dwellings...	Proposed Number of New Dwellings Beyond 2026	[Beyond 2026] Resulting Number of new places for early years required aligned to CCC housing yield formula/year
Cynheidre	Adj Ael y Bryn	0	1	8	1
	The Yard, Heol Hen	4		0	
	Totals	4		8	
Cynwyl Elfed	Adjacent Fron Heulog	3	1	4	1
	Land adjacent Dolwerdd	0		6	
	Land adjacent Lleine	8		3	
Totals		11		13	
Drefach	Land off Heol Caegwyn	6	1	0	2.5
	Nantydderwen	0		33	
	Opposite Cwmawr Lodge	0		30	
Totals		6		63	
Drefach Felindre	Land adj. Aweldeg	0	0	30	1.5
	Parc Puw	0		12	
Totals		0		42	
Ferryside	Caradog Court	8	1	0	0
Totals		8		0	
Five Roads	Adjacent Little Croft	15	1	10	1
	Clos y Parc	11		0	
Totals		26		10	
Foelgastell	Rear of Clos y Gorlan	0	0	14	1
Totals		0		14	
Glanaman/Garnant	Cowell Road	0	1	5	8
	Garnant CP School	3		0	
	Glan yr Afon Farm	0		35	
	Glanamman CP School	0		7	
	Glyn Dreiniog Market	0		11	
	13 Bishop Road	8		0	
	Land adjacent Clos Felen	7		0	
	Parc Bryn Rhos	0		70	
	Land off Bishop Road	0		22	
	Land off Llwynceilyn Road	0		28	
	Land rear of Day Centre	0		5	
	Raven Garage	0		5	
Totals		18		188	
Gorslas	52 Penygroes Road	6	1	0	1
	R/O Maesycrug	0		7	
Totals		6		7	
Hendy	Adjacent Clos y Wern	5	1	0	1.5
	Coed y Bronallt	3		0	
	Fforest Garage	0		17	
	Clayton Road & Bronallt Road	2		16	
Totals		10		33	
Kidwelly	Butter Factory	3	5.5	0	4
	Land adj to Brodawel	9		0	
	Land adj to Stockwell Lane	55		40	
	Land at Former Dinas Yard	30		0	
	Land at Parc Pendre	0		51	

	Land opposite Parc Pendre	16		0	
	Land to the rear of Park View Drive	17		0	
Totals		130		91	
Laugharne	Adj. Laugharne School	14	1	28	1
	Pludds Meadow	10		0	
Totals		24		28	
Llanarthne	Golwg y Twr	0	0	10	1
Totals		0		10	
Llanddarog	Is-y-Llan	6	1	0	0
	Land Opposite Village Hall	16		0	
Totals		24		0	
Llandeilo	Caeglas, Ffairfach	0	1	3	9.5
	Cwrt y Felin, The Old Tannery	3		0	
	Land at Thomas Terrace	0		5	
	Land north of Pantglas	0		6	
	Land opposite Pantglas	0		6	
	Llandeilo Northern Quarter (Allocation)	0		215	
Totals		3		235	
Llandovery	Danycrug	0	2	61	3
	Danycrug (Land taken out)	40		0	
	New Road	0		6	
Totals		40		67	
Llandybie	Land north of Maesypiode	0	0	42	3
	Land off Kings Acre, Kings Road	0		22	
	Land off Lllys y Nant	5		0	
Totals		5		64	
Llanedi	16 Y Garreg Llwyd	4	1	0	0
Totals		4			
Llanelli	Adjacent 73 Parc Gitto, Llwynhendy	10	17	0	62
	Beech Grove, Pwll	10		0	
	Bryncoch West, Dafen	0		15	
	Brynmefys, Furnace	54		16	
	Calfaria Chapel, Ann Street, Llanelli	0		8	
	Cwm y Nant, Dafen	40		145	
	Dafen East Gateway	110		40	
	Former DRAKA site, Copperworks Road	0		75	
	Former Garage, Marsh Street	0		19	
	Former Glynderwen Factory	0		8	
	Former NRW Laboratory	10		0	
	Genwen, Bryn (Allocations)	35		0	
	Heol Goffa, Dimpeth	0		30	
	Land at Nightingale Court, Coedcae	0		50	
	Land at Penallt, Stebonheath	0		60	
	Land at Pentrepoeth (Adj. Parcbyrnmaur)	0		100	
	Land off Frondeg Terrace	0		38	
	Llys y Bryn, Penceiliogi	0		145	
	Maes Ar Ddafen Road	94		206	
	North Dock (inc Pontrilas)	0		335	

	Opposite Playing Field, Llanerch SA15 3EJ	0		12	
	Parc Gitto/Llwynhendy Road	0		30	
	Pemberton Road, Pemberton	9		0	
	Penllwynrhodyn Road East, Llwynhendy	0		25	
	Penllwynrhodyn Road West, Llwynhendy	0		11	
	Rear of 60 Coedcae Road	0		5	
	Southern Unit, AVON Inflatables, Dafen	0		25	
	The Avenue, Morfa	0		35	
	Trostre Gateway	0		70	
	Wellness & Life Science Village	60		0	
	Ynys Las, CefnCaean	0		45	
Totals		432		1,548	
Llanfynydd	Adj Valley View	0	0	13	1
Totals		0			
Llangadog	Adj Rhyd y Fro	0	0	16	1
Totals		0		16	
Llangain	South of Dol y Dderwen	30	1	6	6
Totals		30		6	
Llangendeirne	Adj Maes y Berllan	0	0	12	1
Totals		0		12	
Llangennech	Aberllwchwr	4	3	0	1
	Box Farm	7		0	
	Golwg yr Afon	25		25	
	Maesydderwen	5		0	
	Opposite Parc Morlais	30		0	
Totals		71		25	
Llangynog	Land at College Bach	5	1	0	0
Totals					
Llanllwni	Land adjacent Ger y Bryn	0	1	8	1
	Land at Aber-Giar	4		4	
	Tanybryn	0		8	
Totals		4		20	
Llannon	Adjacent St Nons Church	0	2	34	1.5
	Land north of Clos Rebecca	47		0	
Totals		47		34	
Llanpumsaint	Adjacent Gwyn Villa	0	1	20	1
	Llandre	4		2	
Totals		4		22	
Llansawel	Land adjacent Dolau Llan	0	1	5	1
	Land rear of Maesgriffith	8		0	
Totals		8		5	
Llanybri	Adj Parc y Delyn	0	0	10	1
Totals		0		10	
Llanybydder	Adjacent Y Bryn	0	1	10	3
	Adjacent Y Neuadd	0		6	
	Bro Einon SA40 9SF	9		0	
	Lakefield	0		39	
	Troedybryn	0		23	
Totals		9		78	
Maesybont	Land adjacent Maesybryn	0	0	6	1
Totals				6	

Locality	Site Name	Proposed Number of New Dwellings 2021-2026	Resulting Number of new places for early years required aligned to CCC housing yield formula/year 0.04 X 100 dwellings...	Proposed Number of New Dwellings Beyond 2026	[Beyond 2026] Resulting Number of new places for early years required aligned to CCC housing yield formula/year
Meidrim	Land adjacent to Lon Dewi	10	1	0	1
	Land off Drefach Road	8		2	
Totals		18		2	
Milo	Former Nantgyroes School	0	0	7	1
Totals		0		7	
Mynydddygarreg	Gwenllian Court Hotel	3	1.5	0	0
	Land opposite Parc y Garreg	32		0	
Totals		35		0	
Nantgaredig	Rear of former Joinery, Station Road	0	0	30	1
Totals		0		30	
New Inn	Blossom Inn	0	0	10	1
Totals		0		10	
Newcastle Emlyn	Heol Dewi	3	0	0	3
	Land to the rear of Dolcoed	0		34	
	Millbank	0		12	
	Penlon	0		14	
	Trem y Ddol	0		17	
Totals		3		77	
Pembrey	Cwrt Farm	75	3	0	2
	Former Speedway Garage	0		30	
	Lando Road	0		20	
Totals		75		50	
Pencader	Bro'r Hen Wr	0	0	7	2
	North of Maes Cader	0		37	
Totals					
Pendine	Hazeldene	9	1.5	0	1
	Land at Nieuport Farm	5		0	
	Land at Woodend	16		4	
	Ocean View	3		0	
Totals		33		4	
Peniel	South of Pentre	6	1	0	0
Totals		6			
Pentrecwrt	Land adj Brynywawr	0	0	14	1
Totals		0		14	
Penygroes/Gorsddu	Adj Clos y Cwm, Waterloo Road	6	3	0	8
	Clos y Cwm, Adj Penybont Farm	0		5	
	Emlyn Brickworks	65		175	
	Land adjacent Pant y Blodau	39		0	
	Land at rear of 10-12 Norton Road	0		6	
	Land at Waterloo Road	0		2	
Totals		80		188	
Ponthenri	Incline Inn	0	0	7	1.5
	Land at Ty'n y Waun Farm	0		30	
Totals		0		37	

Locality	Site Name	Proposed Number of New Dwellings 2021-2026	Resulting Number of new places for early years required aligned to CCC housing yield formula/year 0.04 X 100 dwellings...	Proposed Number of New Dwellings Beyond 2026	[Beyond 2026] Resulting Number of new places for early years required aligned to CCC housing yield formula/year
Pontwelly	Adj Crug yr Wyn	0	0	19	1.5
	Cilgwyn Bach	8		16	
	Totals	8		35	
Pontyates	8 Heol Llanelli, Pontyates SA15 5TU	3	1	0	1
	Cae Canfas	2		6	
	Cae Pontbren	0		16	
	Land adj Tabernacle Chapel	8		3	
	Land at Heol Llanelli, Danybanc Road	10		0	
Totals		23			
Pontyate & Meinciau	Adjacent 1 Heol Glyndwr	6	1	3	2
	Black Horse Inn	0		30	
	Land at Heol Glan Gwendraeth	0		8	
	Land to the rear of Brynderi	4		0	
	Lime Grove	19		0	
	Parc Mansant	0		12	
Totals		29		53	
Pontyberem	Adj 39 Heol y Felin	0	40	6	87
	Coalbrook Tip	0		20	
	Land adj Llwynpïod, Bancffosfelen	0		40	
	Land off Ashgrove	0		6	
	Land off Heol Llannon	40		15	
Totals		40		87	
Porthyrhyd	Rear of Ysgoldy Bethlehem	0	0	27	1
		0		27	
Red Roses	Land adjacent Avola Farm	0	0	8	1
Totals		0		8	
Rhydargaeau	Opposite Bryn Bedw	7	1	0	0
Totals		7		0	
Rhydcymerau	Land at Dolau Isaf	0	0	6	1
Totals		0		6	
Saron	Ger Tyddyn-y-Celyn, Hafod Hedd	0	0	1	1.5
	Land adjacent Arwynfa	0		35	
Totals		0		36	
St Clears	Former Butter Factory	10	1	35	1.5
Totals		10		35	
St Clears/Pwll Trap	Adjacent Britannia Terrace	0	1	50	4
	Adjacent Brynheulog	0		40	
	Adjacent Brynheulog	0		40	
	Adjacent to Gardde Fields	4		3	
Totals		4		93	
Talley	Adj Dyffryn Glas	0	1	8	1
	Adjacent Ffynnon Dawel	4		3	
	Land at Edwinsford Arms	0		9	
Totals		4		20	
Trelech	Clos y Cynin	3	0	2	1
	Land adjacent to Tower Hill	0		3	
Total		3		5	

Locality	Site Name	Proposed Number of New Dwellings 2021-2026	Resulting Number of new places for early years required aligned to CCC housing yield formula/year 0.04 X 100 dwellings...	Proposed Number of New Dwellings Beyond 2026	[Beyond 2026] Resulting Number of new places for early years required aligned to CCC housing yield formula/year
Trimsaran	Adj 21 Heol Waun y Clun	0	1	22	5.5
	Adj Filling Station, Bryncaerau	0		7	
	Land at Gwelfor	0		22	
	Land to the rear of Cae Linda	8		34	
	No. 20 Bryncaerau	1		0	
	North of Maes y Ffynnon	0		35	
	Rear of Bryncaerau	0		11	
Total		9		131	
Trimsaran / Carway	Carway Farm	0	3	6	1
	Ffos Las	68		0	
Totals		68		6	
Tumble	62 Heol y Neuadd, Llys Rafelston	0	40	5	1
	Land at Factorysite	40		10	
	Rhydyccerrig Estate, Cwmmawr	0		10	
Totals		40		25	
Tycroes	Land at Heol Ddu	0	0	127	5
Totals		0		127	
Waungilwen	Arwel	7	11	0	6
	Opposite Springfield	4		0	
	Waungilwen Road	0		6	
Totals		11			
Whitland	Adj Lon Hywel	0	3	32	2
	Adjacent Spring Gardens	64		0	
	Land at Maesabaty	0		18	
	Land at Whitland Creamery	20		8	
Totals		84			

Table 10 indicates that the localities which will account for the highest forecast new housing yields are (in order of frequency):

Llanelli locality – with 1,970 new dwelling yields forecast up to 2026

Carmarthen locality – with 1,256 new dwelling yields forecast up to 2026

Ammanford locality – with 562 new dwelling yields forecast up to 2026

5. OVERVIEW – CHILDCARE TYPES, SERVICES AND PLACES

- 5.1 Registered childcare is provided in Carmarthenshire by childminders, day nurseries, sessional care and out of school care settings. We do not currently have any registered crèches offering childcare provision within the County.

Childcare Types – A standard definition

Childminding: Childcare provided by one or more people for children from birth up to the age of 12 years within a domestic premises that is not the child's own home for more than 2 hours per day for reward. Childminders can offer: full day care and part time care including before and after school provision and including atypical hours e.g. evening, weekends and overnight, provision, wrap around care, provision during the school holidays, funded education places and free childcare places. Anyone who proposes to act as a childminder must be registered with CIW unless they are excepted from registration under Part 2 of the Childminding and Day Care Exceptions (Wales) Order 2010 (as amended).

Day care: A person provides day care for children up to the age of 12 if at any time the children are cared for on non-domestic premises. Anyone who proposes to provide day care for children must be registered with CIW unless they are excepted from registration under Part 3 of the Child Minding and Day Care Exceptions (Wales) Order 2010(as amended) Day care on non-domestic premises includes a range of different provisions and CIW registers day care providers under the following categories:

Full Day Care - Full day care for children from birth to up to the age of 12 years, provided for a continuous period of 4 or more hours in any day, in nondomestic premises. It may include day nurseries 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.

Sessional Day Care - Childcare for children from aged 2 years onwards on non-domestic premises which is for less than a continuous period of 4 hours in any one day. The service is mainly used by children aged from 3 to 5 rather than babies or toddlers, although some may admit 2 year olds. Where two sessions are offered in any one day, children must not attend more than 5 sessions per week. There must be a break between sessions with no children in the care of the provider. It may include, playgroups, Cylchoedd Meithrin, wraparound care, funded education places and free childcare places.

Out of School Childcare - The total care for children aged up to 12 years is more than two hours in any day and for more than five days a year. It refers to childcare outside of the child's full time school day and includes care provided before school, after school and during the school holidays. It does not include wraparound care and the Welsh Government free breakfast in primary schools scheme.

Crèches - Occasional day care for children aged from birth up to the age of 12 years on non-domestic premises. They need to be registered where they run for more than two hours a day and more than five days a year, even where individual children attend for shorter periods. Some are in permanent premises and care for children while parents are engaged in particular activities (e.g. training, shopping or sport). Others are established on a temporary basis to care for children while their parents are involved in time limited activities (e.g. a conference or an exhibition).

Open access play provision - Staffed Open Access play provision operating for over 2 hours a day for children up to the age of 12 years can be permanent or temporary provision, located in a variety of settings with or without premises and can include holiday play schemes. This provision usually caters for a wide age range of children, normally aged 5 years and over. The purpose is to provide staffed play opportunities for children usually in the absence of their parents. Children are not restricted in their movements, other than where related to safety matters and they are not prevented from coming and going as and when they wish.

Nanny - A Nanny is employed directly by the parents of up to two families caring for the children in the home of either of the families.

- 5.2 Carmarthenshire residents most frequently use childcare provision based in the county. This has been confirmed by the October 2021 Welsh Government parental survey. Essentially, in June 2021 there were 249 childcare providers in Carmarthenshire registered with Care Inspectorate Wales (CIW). Of these 249 registered providers, 103 were childminders; 38 were day nurseries; 64 were sessional care settings and the remaining 44 were out of school care settings. These providers offered a total of 4,772 registered childcare places. The number of registered childcare providers and places available within the County has increased since our last CSA in 2017.

Table 11 - Registered Providers by type and places 2016-2017

Setting type	Registered providers	Registered places
Childminders	113 (55)	735 (295)
Full day care	35 (17)	1,314 (630)
Sessional care	52 (51)	955 (935)
Out of school care	42 (24)	1,161 (653)
Total	242 (147)	4,165 (2,513)

Table 12 - Registered Providers by type and places June 2021

Setting type	Registered providers	Registered places
Childminders	103 (37)	787 (269)
Full day care	38 (10)	1,462 (405)
Sessional care	64 (58)	1,186 (1,091)
Out of school care	44 (25)	1,337 (824)
Total	249 (130)	4,772 (2,589)

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

- 5.3 In Carmarthenshire had 15.5 registered childcare places for every 100 children aged 0-14 years old, an increase from 14 per 100 in 2017. Once again, it should be noted that the number of registered settings provides only a partial picture of childcare in the County. Some settings do not require registration, and these include for example, settings that offer services for children aged over 12 years of age, services which operate under two hours and services which are exempt from registration.

6. DEMAND FOR CHILDCARE

Overview of Parent/Carer Consultation

Analysis of Parent/Carer Questionnaires

- 6.1 The narrative below details the outcomes of the Welsh Government parental survey which was facilitated in October 2021.

Additionally, Carmarthenshire County Council organised and facilitated a series of e-consultation sessions in late 2021 and early 2022 and the section below combines analysis of the Welsh Government parental survey with (demand-focused) themes that were highlighted during those sessions.

- 6.2 A total of **821** useable replies were received to the Welsh Government parental survey.

Background of responding parents/carers

- 6.3 In terms of the type of household(s), the most frequent response provided by responding parents/carers was that they: share responsibility for my child(ren) with someone that I live with (75% of respondents), followed in frequency by a parent/carers stating that I have sole responsibility for my child(ren) (20% were in fact, single parents).
- 6.4 The average number of children evidently being raised by all respondents was 1.7 (exactly the same as the UK average) - with the Carmarthen Town North LSOA accounting for the highest average number of children stated, followed in frequency by the Ammanford LSOAs.
- 6.5 The age cohort which responding parents/carers were evidently most frequently raising was 5-8 years [375 children], followed by under 2 years [206 children]. 49% of responding parents/carers evidently had at least one child aged 0-4 years and 68% of responding parents/carers evidently had at least one child aged 5-18 years. The LSOA which accounted for the highest number of responses from a parent/carers with 2, 3 and/or 4 year olds was Carmarthen Town North.

Number of places required by children who have additional learning need or who require specialist care due to a disability

- 6.6 10% of responding carers/parents stated that they were caring for/raising at least one child with additional learning needs (ALN) or a long-term illness. 12% of respondents stated that they had a child who required (even more) additional support with their learning.

In December 2021, Carmarthenshire County Council facilitated an e-consultation session with carers of children and young people with ALN. Key feedback that was provided by the carers who attended this session was:

- In terms of out of school childcare, there was a reliance on breakfast clubs to ensure that they were able to get to their places of employment or start work on time. Two participants described out of school childcare as their “*key issue*”
- How vital Flying Start was to relevant parents/carers, including as a source of advice about diagnosed or undiagnosed needs
- Carers were not sure what Tax Free Childcare was or meant.

6.7 All responding parents/carers to the Welsh Government stated what their employment status currently was.

Table 13 - Employment status of responding parents/carers

Status	Percentage of relevant responding parents/carers
Looking for a job – but not working yet	6.5%
Employed	82%
Self-employed	6.5%
In education or training	9.5%
Not working and not looking for a job	2.5%
Unable to work	4%

80% of responding parents/carers evidently had a partner and their employment status was described by the respondent as follows:

Table 14 - Employment status of partners

Status	Percentage of relevant responding parents/carers
Looking for a job – but not working yet	1.5%
Employed	63%
Self-employed	14%
In education or training	1.5%
Not working and not looking for a job	<0.5%
Unable to work	<0.5%
Not relevant (as do not have a partner)	20%

- 6.8 Table 15 indicates the incidence of responding parents/carers stating their gross household income per week (before deductions/tax)

Table 15 - Incidence of gross household income per week (before deductions/tax)

Weekly household income	Percentage of relevant responding parents/carers	Most frequently stated type of formal childcare accessed
Up to £100	<0.5%	Private Day Nursery
£100 to £149	2%	After School Club
£150 to £249	6%	Before School Club/Breakfast Club
£250 to £349	9.5%	Before School Club/Breakfast Club
£350 to £500	8.5%	Before School Club/Breakfast Club
£500 to £580	8.5%	Private Day Nursery
£581 to £750	14%	Before School Club/Breakfast Club
£750 to £999	15%	Private Day Nursery
More than £1,000	16%	Before School Club/Breakfast Club
Prefer not to say	20%	Before School Club/Breakfast Club

- 6.9 Table 16 indicates the incidence of responding parents/carers stating specific ethnic backgrounds.

Table 16 - Ethnicity of responding parents/carers

Stated Ethnicity	Percentage of relevant responding parents/carers
White	96.5%
Mixed/Multiple ethnic groups	1.5%
Asian/Asian British	1.5%
Black/African/Caribbean/Black British	<0.5%
Other ethnic group	0
Did not say	0

Childcare Usage in 2021

- 6.10 Table 17 below indicates the frequency with which responding parents/carers stated that they used specific types of childcare during term time.

Table 17 - Frequency with which responding parents/carers stated that they used specific types of childcare during term-times

Type of childcare registered or non-registered childcare	Percentage of relevant responding parents/carers
Childminder	8%
Before School or Breakfast Club	36%
After School Club	24%
Private Day Nursery	31%
School-based Nursery	3%
Sessional Playgroup	1.5%
Cylch Meithrin	13%
Drop-Off Creche	3%
Nanny	1 parent
Au-Pair	0
Family/friends (paid)	3.5%
Family/friends (unpaid) including grandparents	51.5%
Stated none during term time	8.5%

Table 17 indicates that the three most frequent types of formal childcare being accessed by responding parents/carers in term-time were (in order of frequency):

1. Before School/Breakfast Club
2. Private Day Nursery
3. After School Club

- 6.11 Correspondingly, Table 18 below indicates the frequency with which responding parents/carers stated that they used specific types of childcare during holiday times.

Table 18 - Frequency with which responding parents/carers stated that they used specific types of childcare during holiday-times

Type of childcare registered or non-registered childcare	Percentage of relevant responding parents/carers	% difference with term time
Childminder	7%	-1%
Holiday Club or Playscheme	9.5%	n/a
Private Day Nursery	30%	-1%
Pre-prep Private School	0	n/a
Sessional Playgroup	1%	-1%
Cylch Meithrin	7%	-6%
Drop-Off Creche	2%	-1%
Nanny/Au-Pair	<0.5%	No change
Playscheme	3%	n/a
Family/friends (paid) including grandparents	6.5%	+3%
Family/friends (unpaid)	51%	-0.5%
Stated none during school holidays	12%	+3.5%

Table 18 indicates that the two most frequent types of formal childcare being accessed by responding parents/carers in the school holidays were (in order of frequency):

1. Private Day Nursery
2. Holiday Club or Playscheme

- 6.12 67% of all responding parents/carers (who had at least one 3 and/or 4 year old) stated that they were accessing a funded early education place at school or nursery or a sessional playgroup.

With regard to the Childcare Offer, responding parents/carers who had at least one 3 and/or 4 year outlined their usage as follows:

Table 19 - Uptake of the Childcare Offer by relevant parents/carers in autumn 2021

Status aligned to the Childcare Offer	Percentage of relevant responding parents/carers
Yes, am accessing in the Carmarthenshire locality	42%
Yes, am accessing (however) outside Carmarthenshire	1%
No, but may access soon in the future	15%
No, with no plans to do so	24%
Not sure	8%
Not using	14%

- 6.13 11% of responding parents/carers who had at least one 2 and/or 3 year old stated that they were accessing a Flying Start (childcare) place, with the Trimsaran 1 LSOA for this survey, accounting for the highest frequency of such responding parents/carers accessing a place.

It can be noted that in December 2021, Carmarthenshire County Council facilitated a e-consultation session with parents and carers that were accessing the Flying Start programme in the Llanelli vicinity, including its childcare place element. Feedback which was particularly emphasised by this cohort of six parents/carers was:

- As well as accessing a Flying Start programme childcare place, there was a reliance too on informal childcare being provided by grandparents
- Some feelings of guilt that they ‘qualified’ to access the Flying Start programme, whereas other families who also had discernible needs were unable to, because of where they were resident. Two parents stated that in their opinion the Flying Start programme should ideally also ‘target’ families from “isolated rural” communities
- Also a collective feeling of ‘appreciation’ given the level of support that the Flying Start programme was able to provide, and the fact that the programme enabled them to “interact” with families from similar backgrounds and circumstances.

Paying for Childcare

- 6.14 Each responding parent/carer was invited to state how much they spent on an average week on (paid, non-funded) childcare:

The most frequently stated amount was £0/week by 22% of all responding parents, followed in frequency by £10.00 - £49.00, stated by 19.5% of all responding parents. It can be noted that 6% of parents stated £200.00 - £299.00 per week and 3% of parents stated £300.00 or over per week.

The areas which accounted for the highest frequency of parents stating: £100.00 or over/week were the Gorslas areas, followed in frequency by the Carmarthen Town North LSOA.

It can be noted that each parent/carers was requested to state whether they received any help towards meeting the cost of their childcare:

- 11.5% of responding parents/carers stated: (yes, the) childcare element of the Working Tax/Universal Credit
- 19.5% of responding parents/carers stated: (yes, the) Childcare vouchers/Tax Free Childcare
- 0 responding parents/carers stated: (yes, the) Childcare Grant for Students
- Only 1 responding parents/carers stated: (yes, a) Employer contribution

Hours used of Childcare

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

For term-time:

The most frequently stated amount of hours was 30/week, followed in frequency by 20 hours/week.

For holiday-times:

The most frequently stated amount of hours was also 30/week, followed in frequency by 40 hours/week.

Satisfaction Levels

6.16 Parents/carers were invited to state how satisfied they currently were with their current childcare situation.

Table 21 - Satisfaction levels

How satisfied a parent/carers was:	Percentage of relevant responding parents/carers
Very Satisfied	49%
Quite Satisfied	24%
Quite Dissatisfied	4%
Very Dissatisfied	2%
(Said) Not applicable	11%
Did not say	10%

Parents/carers who stated: Quite Dissatisfied or Very Dissatisfied were (proportionally) most frequently resident in the Ammanford area and with an equal frequency the Saron area.

All responding parents/carers were invited to state the degree to which they agreed with or (instead) disagreed with a selection of statements about childcare provision.

Table 22 - Parents general thoughts on aspects of childcare in the Carmarthenshire locality

Statement	Strongly Agree	Tend to Agree	Tend to Disagree	Strongly Disagree	Not applicable
I am satisfied with my childcare in term time	43%	29%	7.5%	5%	15.5%
I am satisfied with my childcare in school holidays	31.5%	24%	10%	10%	24.5%
The quality of childcare is high	47%	30%	4%	2%	17%
There is a good choice of childcare in my area	18%	28%	25%	17%	12%
Childcare caters for my children's needs	38%	31%	8%	5%	18%
I would like my child to attend more registered childcare	23%	25%	10%	8%	34%
Childcare is too expensive	59%	25%	6%	1%	9%
I have a problem with childcare arrangements that are unreliable	6%	9%	15%	27%	42%
Childcare is a barrier to me accessing employment or training	19%	22%	11%	17%	30%
I know where to find out information about childcare	19%	34%	24%	11%	12%
I know where to find information on financial assistance	8.5%	22%	29%	26.5%	14%

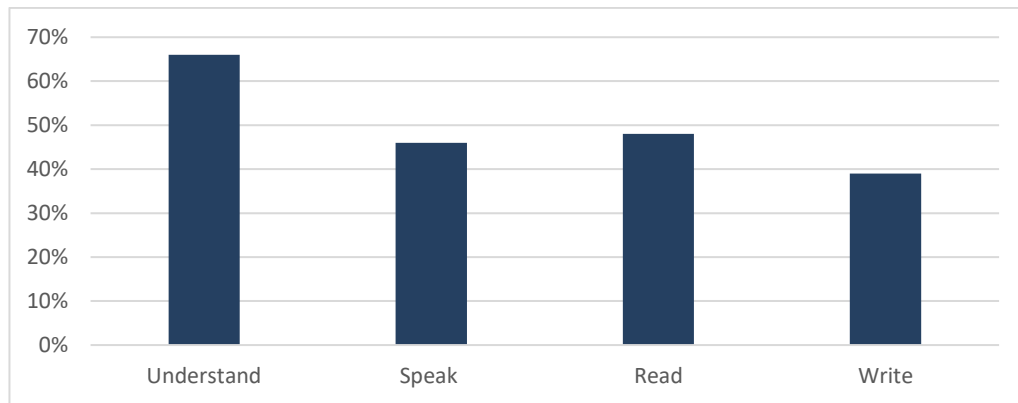
The response strongly agree: childcare is too expensive, was most frequently stated by parents/carers who were resident in the Carmarthen Town North LSOA.

The response agree: childcare is a barrier to me accessing employment or training, was almost most frequently stated by parents/carers who were resident in the Carmarthen Town North LSOA.

Welsh-medium Childcare

6.17 All responding parents/carers were invited to state whether they could speak, read and/or write the Welsh language.

Fig. 6 - Incidence of proficiency in Welsh language



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

Childcare and its effects on employability

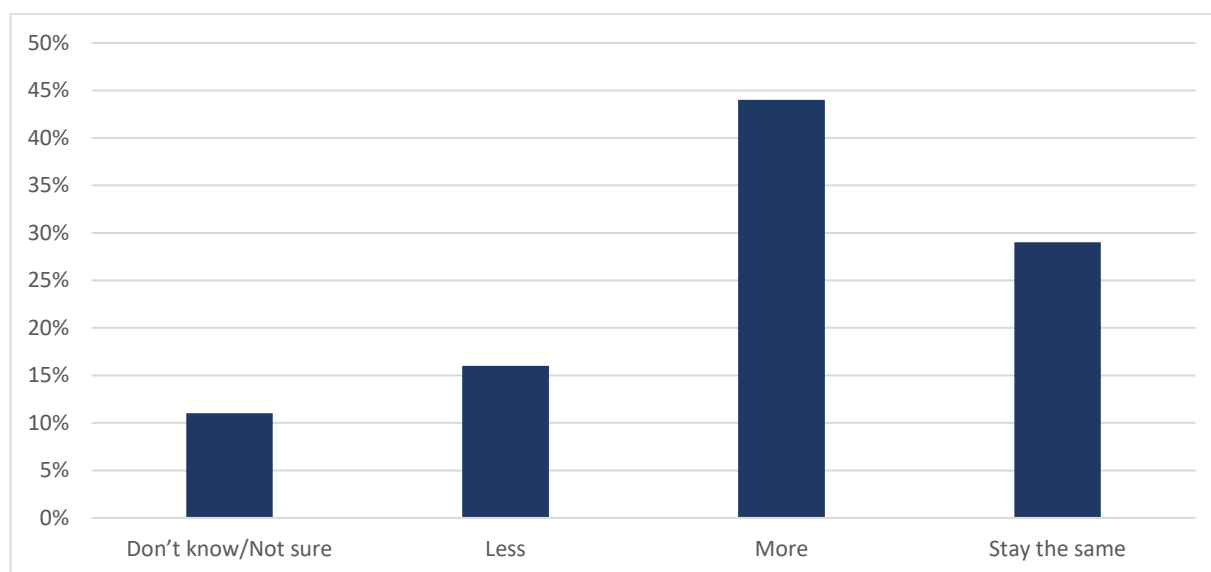
6.18 The October 2021 Welsh Government parent/carer survey invited its target audience to state whether in the past year, issues surrounding childcare had affected themselves or a[ny] partner:

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

Future intentions

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

Fig. 7 - Consideration of whether more or less childcare will be accessed in the next 2 years



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

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

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

It can be noted that 27% stated a Cylch Meithrin.

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

Family Information Service, enquiry data for 2021-2022

6.20 An indication of demand for childcare within Carmarthenshire can be obtained by analysing the number of enquires made to the Family Information Service by type of childcare required. The table below shows the total number of enquiries for March 2021 to February 2022.

Table 23 - Total number of enquiries for March 2021 to February 2022

March	April	May	June	July	August	Sept	Oct	Nov	Dec	Jan	Feb
170	148	128	237	190	151	193	132	150	75	130	146

BARRIERS TO CHILDCARE PROVISION

- 6.21 In summary, as in 2017, the responses from the parent/carers survey from 821 parents provided a clear picture of the childcare provision in the county. With regards to accessibility barriers, compelling feedback was received.

Barriers experienced by specific target groups

- 6.22 The Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016 require all Local Authorities to consider the barriers experienced by;

- (i) working parents
- (ii) parents seeking work or training opportunities
- (iii) unemployed households
- (iv) low income families
- (v) lone parent families

- 6.23 The October 2021 Welsh Government parent/carers survey also invited its target audience to give feedback about any barriers that they had encountered with regard to them accessing childcare of their choice. The collective feedback of the parents/carers is summarised in Table 24 below.

Reasons	Percentage of relevant responding parents/carers
Child is on a waiting list for a place to be available	2%
There is no childcare with sufficient quality	1.5%
There is no suitable Welsh language provision	1%
No suitable provision in our language not English/Welsh	0.5%
The childcare available is not flexible enough for my needs	7.5%
The cost of childcare is too expensive	19%
Childcare times are unsuitable	5%
There is no childcare available that is suitable for my child's age	5.5%
There is a problem with transport	2%
There is no childcare where I need it to be	5.5%
There is no childcare that can cater for my child's specific needs	1.5%
I only use childcare on an ad hoc basis and it is impossible to plan	4%

Table 24 - frequency of reasons stated as to why a parent/carers was not accessing/receiving support with childcare in autumn 2021

6.24 A broad analysis of Table 24 was outlined in Section 6 of this CSA. It indicated that when a barrier was highlighted it was only ever, at most, stated by approximately 1:5 parents or carers.

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

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

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

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

5% of respondents who denoted that their weekly earnings was below £150.00 (gross) stated too that a key barrier was that: the cost of childcare is too expensive (stated by 20% of relevant parents/carers).

The main two repeated barriers that was reported by lone/single parents was: the cost of childcare is too expensive (stated by approximately 1:5 of relevant parents), followed in frequency by: the childcare available is not flexible enough for my needs (10.5%).

The three most frequent barriers that were reported by parents who were unemployed/not working were:

1. The cost of childcare is too expensive
2. There is no childcare suitable for my child's disability/additional learning needs
3. There are no childcare spaces available locally to me

6.26 The Welsh Government parental survey and a series of focus groups that were facilitated with parents and carers in December and January 2021, also invited parents and carers to provide qualitative feedback about their childcare experiences, satisfaction levels and any barriers that they had experienced, or that they continued to experience.

In terms of the theme of barriers to accessing formal childcare in via both types of research - the most frequent type of feedback was (words to the effect)

"since COVID-19, out of school childcare places have been gradually reopening".

Specific feedback on this theme, in October 2021, included:

"My local school has never properly re-started it's out of school childcare since the first COVID-19 lockdown. [To the best of my knowledge] It has never given an explanation for this... I am a supply teacher and find it impossible to work if I can't get access to an after school club".

"My school stopped its after school club during COVID-19, so we had to find someone private to help out until we finished work".

"There was no breakfast club due to COVID-19, and no after school club either at my school. This was 'massively unfair against single parents who wanted and needed to work, as places were only given to key workers and free school meals children. 'Breadline families' were left to suffer".

"The after school which was run by my school still hasn't restarted due to COVID-19! This was not helped by the fact that there is only one childminder in my local area".

"In my opinion, there are not enough holiday club places in my area since COVID-19".

"My local after school club is still not up and running. Although we live in Carmarthenshire, my two children attend a school in Ceredigion. It is paramount that this facility is 'enabled' once again, urgently. It is having a huge effect on me and my husband being able to fulfil our contracted hours. Fortunately, my sister is on maternity leave now but is going back to work next month. If the after school clubs are not up and running by then it will have a detrimental effect on our employment".

"Our local after school provision is only one day a week now and its timing is not appropriate for working parents. I work from home at present due to COVID-19 so have more flexibility, but when things return to being office-based, I will not have childcare options locally for my needs".

"My local after school club times changed after the pandemic with [to the best of my knowledge] no consultation with parents or notice, due to staff issues".

The second most frequent type of feedback was (words to the effect) *"I have difficulties in finding suitable childcare for my child with additional learning needs"*.

Specific feedback on this theme included:

"I can't find any suitable childcare for my disabled son who requires 'flat access' for his wheelchair... [in my experience] childminders do not have suitable venues...I have a backlog of childcare vouchers that I am unable to use".

A recurrent proportion of the feedback on this theme focused on the subject of Autism – for example:

“I have struggled to find childcare provision which can support a child with autism”.

“There is [in my experience] 0 childcare available for a child with autism, who needs specialist attention” – and similarly:

“There isn’t [in my experience] somewhere capable of dealing with autism... we were using a ‘holiday club’ before the pandemic to keep a routine going, but it has not been running since”.

“Our daughter is Autistic non-verbal. It has been a nightmare finding suitable one-to-one childcare for her”.

“[In my experience] there are not many facilities in Carmarthen that ‘cater’ for autistic children”.

*“I could not find a placement who could meet my son’s autistic ‘with complex’ needs...and even when one was found who could provide the one-to-one support he needed it was only available for very limited hours. This severely limited my availability for work and actually led to me being dismissed from one role. Once he was in school there was no **accessible** holiday carer who could meet his needs”.*

Other parents and carers provided feedback aligned to other types of ALN – for example:

“I find it difficult to find after school care for the one day a week that I am in University, so I rely on family and friends as that is all that is suitable for his needs, as he is fourteen and he has Downs syndrome”.

The third most frequent type of feedback was (words to the effect) “Opening hours and flexibility can be a problem for me”.

Specific feedback on this theme firstly focused on drop-off times and Breakfast/Before-School Clubs:

“My daughter is aged 7 and has to go to a crèche with babies, for drop offs – this is because the local Breakfast Club doesn’t start early enough”.

“My breakfast club starts at 8.15am which means its difficult to get to work on time” and similarly:

"I had difficulty finding a place that opened early enough to drop my child off for 'us' to be in work by 8.20am".

"I have had to rely on family for childcare as both myself and my partner start work early and have to commute early".

"Quite simply our breakfast club does not start early enough".

The feedback continues – for example, from other parents:

"Our breakfast club starts at 8.10am, which is different to its published times online of 7.45am. This has caused massive problems with my partners new job, which he very nearly had to give up" – and similarly:

"Our school breakfast club used to be 7.50am onwards and now it's an 8.10am start, which doesn't allow me anytime to travel far to work. I have therefore had to look for work local" – and similarly, again:

"Breakfast clubs are fantastic but in the last few months it's gone from starting at 7.50am to 8.10am, which means I can't get to work on time".

Specific feedback on this theme also focused on after school clubs:

"Our school has an after school club, but this closes at 5:30pm and this is too early to allow travel from Carmarthen to where I live".

"My after school club only stays open until 5:15pm... it closes too early. So, I need to pay for someone to pick my child up from after school club as I don't make it back in time from work" – and similarly:

"The after school club is only available twice a week, and it finishes at 5.15pm - which is a very awkward time".

Finally, additional specific feedback on this theme, included:

"In my experience, childcare does not provide long enough hours for people to be able to gain suitable employment".

"A problem is there is 'none' available at short notice when I get called in to work".

"I was not able to enrol my children in the nearest primary school as the school had 0 childcare provisions for working parents. For this reason, I had to enrol my children some miles away... as that other school offered breakfast club and an after school club, so I could work. I have no outside family support it's just me and my children".

A fourth repeated type of feedback also focused on out of school and was (words to the effect) “I would like to see more holiday time childcare in my local area”.

Specific feedback on this theme included:

“There is hardly any provision in local area during school holidays. The provision there is for limited hours only, which is ‘impossible’ when you have a job requiring you to work 8 hours a day. I absolutely dread school holidays when I can’t take time off as it is so stressful trying to find somewhere for my older children, local or on my journey to work, that provides care for at least 9 hours and is affordable. Virtually impossible. Yet in other areas there appears to be a massive choice for parents of affordable, day long clubs?”

“Childcare during the school holidays continues to be difficult to arrange [in my experience]. There is no provision in school holiday time for children in the area of Carmarthen. The nearest is often a private nursery which as he is now older he does not want to go to as the children are very young”.

“The only time we face difficulties is during school holidays as Cylch Meithrin is term time only. We do not wish to use any other childcare provider during holidays - therefore we juggle the childcare by using annual leave and family/friends”.

“We struggle with childcare during the school holidays as me and my partner work 8 hours a day and sometimes cannot get the time off work. I find there is not enough options for working parents that doesn’t cost ‘a fortune’ to attend”.

Some feedback focused on the older age groups of children, and childcare during this specific period of the year:

“There is a lack of options for holiday time childcare for my sons age 10 and 12 in the Swiss Valley area...”.

“For me it is particularly difficult to find suitable childcare for older child, particularly during school holidays”.

“In 2021 we were well provided for in my immediate locality due to a private holiday club ‘stepping in’. However, in previous years I have had difficulty finding quality childcare over the holidays that was affordable. Some schemes seem to have been cancelled and moved location at short notice. I have had a difficulty in finding age-appropriate holiday care for older children as it seems to be geared towards much younger children”.

“There are not enough available forms of childcare for children over 5 years of age during the holidays. This makes it very difficult when both parents are employed”.

"I find that after school provisions and holiday clubs seem to stop at age 11... my son is now 12 years and I am paying for private holiday club provision, which does not run all the time. The holiday clubs [located] at Leisure Centres are great but the start and finish times again do not cater for working parents".

Additional feedback on the theme of childcare during the school holidays included:

"I have only just started looking for more childcare other than Cylch Meithrin as I now have to look for a job and there doesn't seem a lot available in my area: especially during the school holidays".

"I have a nine-year-old daughter and am finding that there are no school-based holiday clubs in the area for her. I have had to pay for private childcare in the holidays which cost me £30 a day. I think all schools should do a free holiday club and not just target them at people on low incomes".

"During the school holidays if I can't get a family member to look after my children, I will either take annual leave or unpaid leave".

"I really struggle to find formal childcare for my girls during the school holidays that is both affordable and suitable for them".

Indeed, a fifth repeated type of feedback was (words to the effect) *"I still struggle to afford childcare"*.

Specific feedback on this theme included:

"The 'seriously high' cost of childcare has a negative impact on my life. We are both working 24/7 and pay £900 a month, when others in the nursery only pay 15% childcare due to not working" – and similarly:

"In my opinion there is no financial support for the 'middle pay bracket'. We never qualify for support and result in going into debt just to be able to work whilst having a family. You either have to be rich to pay the childcare fees or not bother working to get financial support or not need the childcare at all..." and:

"Childcare is of course too expensive... There is no childcare help given to mothers who want to go back to work. [In my opinion] help is primarily given to those who choose not to return and giving them funds enables them to do this. It is more financially viable for mothers not to work and it's not fair on those of us who have careers".

"Full time childcare for my child under 2 years is extremely expensive".

"I cannot afford childcare and have to rely on grandparents... who in turn have had to reduce their working hours".

"Due to my hours of work childcare is extremely expensive. The costs per hour are more than I make in an hour".

"I can't afford to pay for childcare and it's been difficult at times during COVID when the schools were shut!"

A sixth repeated type of feedback was focused on the theme of localised waiting lists:

"Childcare is a big problem in the Cross Hands area. I am on a waiting list for April 2023. I am not entitled to any financial help from the government yet".

"Availability is my big issue, initially due to my chosen nursery having a long waiting list".

"[To the best of my knowledge] there are long waiting lists with all providers in the area".

A seventh repeated type of feedback was that employability was in some instances affected by childcare, particularly the theme of (the extent to which it could be flexible) – and especially, it was evident, among parents who had to work shift hours:

"Due to the flexibility we needed around our jobs we opted for an au pair. This was unregulated and quite a risk; often 'they' were not well prepared and due to the rurality of our location finding anyone who would accept the placement was challenging. There is just not any local suitable options available for the time frames we need given our travel to work journeys, myself to RCT and my husband to Cowbridge".

"I work shifts and my husband works until 6.00pm or later. There are no nannies around and childminders in our area [in my experience] only want younger 'kids' for the full day. I am willing to pay but no services are available in Carmarthen for our needs. Rural childminding services are even worse... I contacted 20 and none were able to help".

"Childcare providers are simply not flexible enough for shift workers".

"I will have difficulty from 2022 onwards with my new born due to working shift... I begin [work] at 7.15am and partner begins at 8.00am, and nowhere local seems to open early enough for us to get to work on time".

Finding childcare that covers evening and early morning working or changing shift patterns is practically impossible. Being unable to access childcare which allowed me to take on shifts outside of office hours meant that I had to drop down to 'one short shift a week at work'. My son therefore will not qualify for the funded childcare places when

he turns 3 years. This will mean that I am unable to go back to work at all after my maternity leave ends. It seems very unfair that you have to be earning a certain amount to qualify for free childcare”.

“We both work shifts and have found it ‘impossible’ to get childcare. We are lucky that my parents have helped, because without them working would be very hard. It has caused many disagreements within the family and a little confusion to the children when they were small...”.

“As previously explained, there are never any spaces in our after school club, so I have to juggle shifts to work most weekends... and rely on friends and family in order to pick the children up every day”.

*“Unless you have local family support (we are fortunate in that we are able to rely almost exclusively on grandparents who are healthy enough and happy to do so) finding any form of suitable childcare outside the standard 8am-6pm hours is virtually **impossible**. Unless you work in a role with a short commute where you are guaranteed to be able to leave work and have a supportive employer this can make life very difficult”.*

“[In my experience] there are very few flexible childcare venues. As a shift worker my rota changes regularly”.

“As we have no family or friends to help we currently work split shifts or catch up in evenings which means the child cannot attend even extra activities”.

“I found it difficult to find childcare that starts early enough in the mornings and opens late enough in the evenings. This is why I have had to rely on family and friends”.

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

Parents and carers from specific backgrounds were consulted: 1. Carers of children with additional learning needs; 2. Parents and carers that were resident in (relatively deprived) areas of Llanelli and; 3. Parents and carers who were either accessing Welsh-medium childcare or were interested in accessing such provision in the future.

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

- The fact that a lack of childcare provision had affected their employment decisions

- That out of school childcare options had been causing challenges most frequently, post the COVID-19 pandemic
- They would like more awareness of what was “*meant*” by Tax Free Childcare and how they might qualify.

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

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

7. SUPPLY OF CHILDCARE PROVISION

(DISCLAIMER: Some providers didn't answer some of the questions within their Self-Assessment of Service (SASS) return and it is evident that some questions have been interpreted in different ways by different providers. Also, SASS data only accounted for 88% of all registered childcare providers within the County. Therefore, due to incomplete SASS data we have used additional information from the Family Information Service and Care Inspectorate Wales to collate this supply section of the Report).

CHILDMINDERS

Analysis of Supply of Childcare Provision

Childminders

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

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

- 7.2 The autumn 2021 survey with registered childminders indicated that the average start time was 7:24am and the most frequent start time was 7:00am. The average finishing time was 17:42pm and the most frequent finishing time was 18:00pm. (Only three childminders stated that they closed beyond 19:00pm, 20:00pm and 22:00pm).
- 7.3 There are 35 childminders who have Dewis records of which nine have stipulated that they do/can offer weekend service. 1 childminder has also stipulated that she can provide overnight care.

The 2021 SASS responses indicate that the majority of childminders operated for 5 days per week.

- 7.4. Carmarthenshire County Council's autumn 2021 survey with childcare providers ascertained clarification of standard daily rates, for non-government funded childcare places, aligned to early years age groups.

Table 13 - Average daily rates for fee paying places – aligned to age group

Age cohort	Average daily rate for (fee paying places) age group with childminders:
0-12 months	£37.10
1 years	£37.60
2 year olds	£37.50
3 year olds	£37.60
4 years olds	£37.00

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

- 7.5 In 2017, the large majority of childminders (88%) spoke more Welsh than English in their setting, with only 7.7% communicating in English only. In 2021, the SASS responses indicated that 16% of childminders communicated in Welsh as a first language, and that 31% of responding childminders communicated in English only.

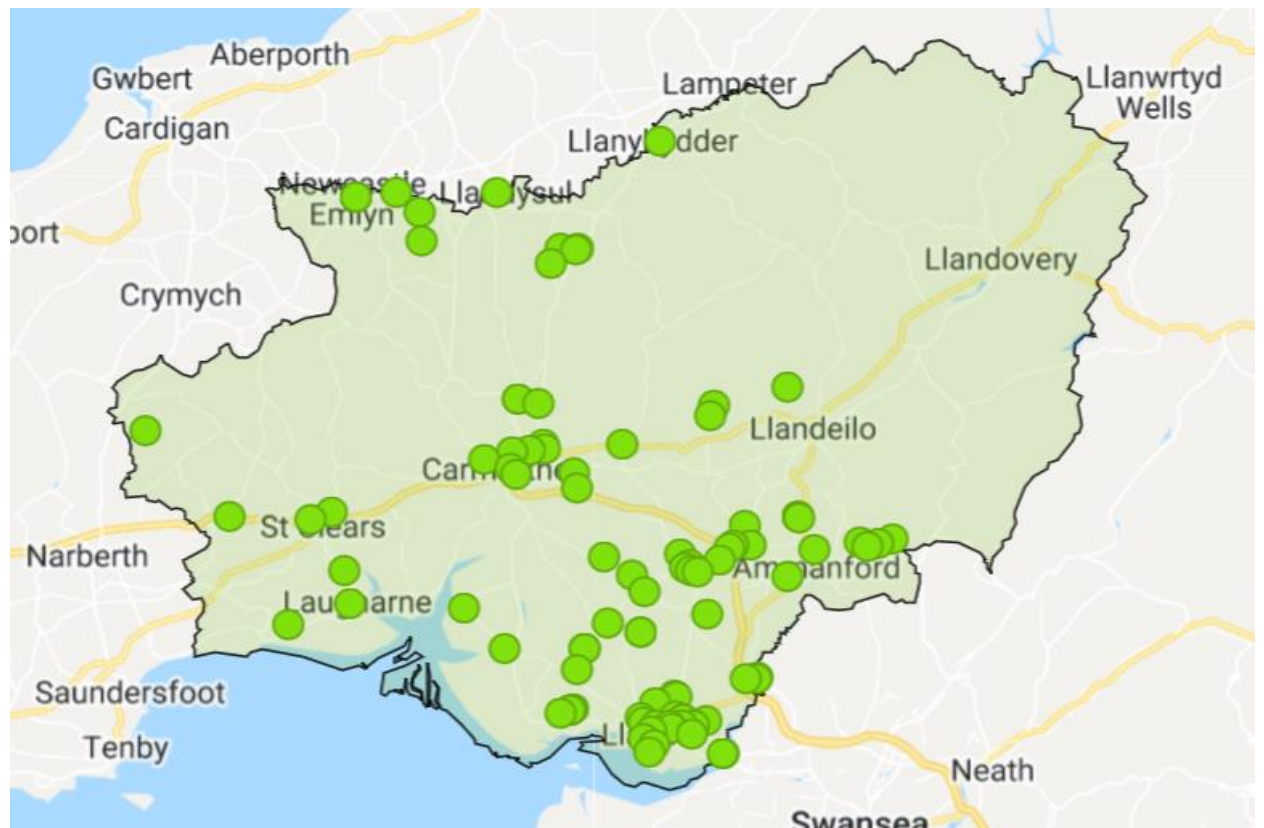


Fig. 2 - Location of childminders in Carmarthenshire

FULL DAY CARE

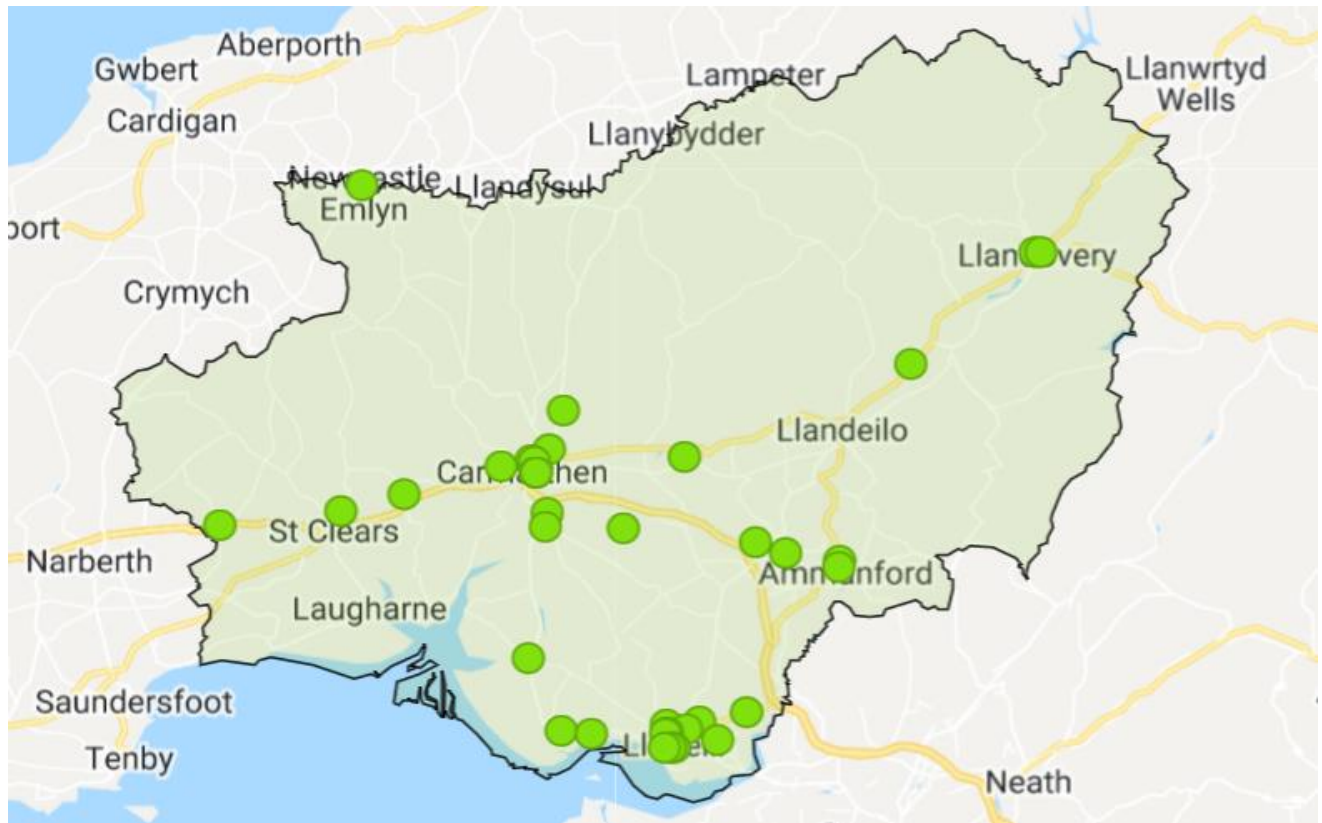
Analysis of Supply of Childcare Provision

- 7.6 Between 2017 and June 2021 the number of day nurseries/full day care providers in the county had increased from **35** to **38**. Likewise, the total number of registered childcare places has increased by 148 places, to 1,462.
- 7.7 Day nurseries provide 30.5% of all registered childcare provision in the County with the greatest level of provision in the more urbanised areas of Carmarthen and Llanelli.
- 7.8 Day nurseries are generally open all year round, for five days a week.

The 2022 Childcare Sufficiency Assessment has indicated that the opening and closing times of the day nurseries have remained consistent since 2017, with minimal divergence from opening hours of circa 7.30am – 18.00pm (with some exceptions to 18.15pm or 18.30pm – on request). Carmarthenshire County Council's autumn 2021 survey with childcare providers ascertained confirmation on opening times. For the ninety-two responding early years childcare providers/settings – the most frequent opening time was 8:00am. The most frequent time closing time was 18:00pm.

- 7.9 Carmarthenshire County Council's autumn 2021 survey with childcare providers ascertained that an average day rate charged by full day care providers in the county was £45.00.
- 7.10 In June 2021, 45% of full day care providers stated that the main language via which their service was provided was Welsh, or that it was [an]other language spoken at their setting (43% of additional respondents).

Fig. 3 - Location of full day care Providers in Carmarthenshire

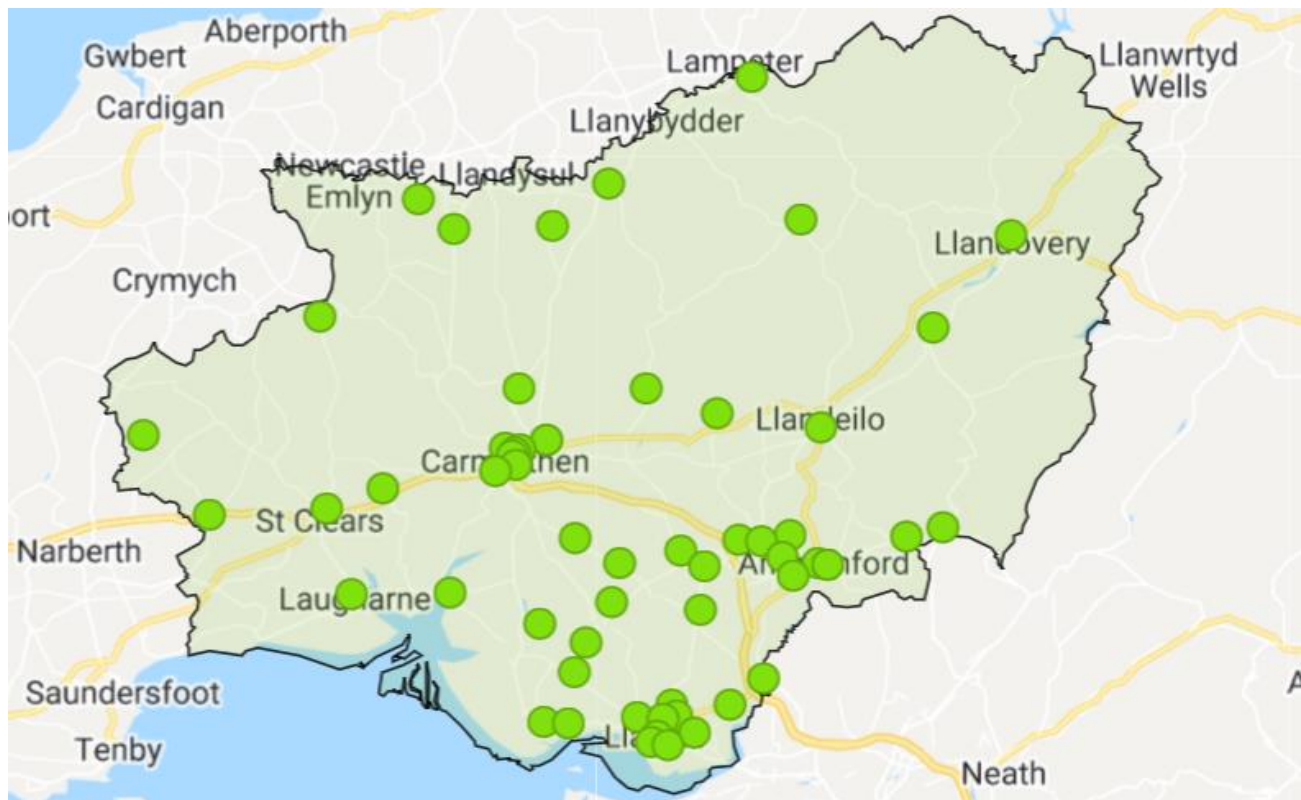


SESSIONAL CARE

Analysis of Supply of Childcare Provision

- 7.11 Between 2017 and June 2021 the number of sessional care settings had increased from 52 registered settings to 64. Likewise, the total number of registered childcare places had increased from 955 to 1,186 registered places.
- 7.12 Sessional day care provides **24.5%** of all registered childcare provision in the County. Sessional Care settings are identified as Cylchoedd Meithrin or Playgroups and can be registered as sessional or Full Day Care with CIW.
- 7.13 The June 2021 SASS responses indicated that the average rate charged per session was £10.68, with such charges ranging from £7.00/session to £16.42/session.
- 7.14 Also in June 2021, 64% of sessional day care providers stated that the main language via which their service was provided was Welsh, or that it was [an]other language spoken at their setting (36% of all the other additional respondents).

Fig. 4 - Location of Sessional Providers in Carmarthenshire



CRÈCHES

Analysis of Supply of Childcare Provision

- 7.15 In Carmarthenshire there are no registered creche facilities.

OUT OF SCHOOL CARE

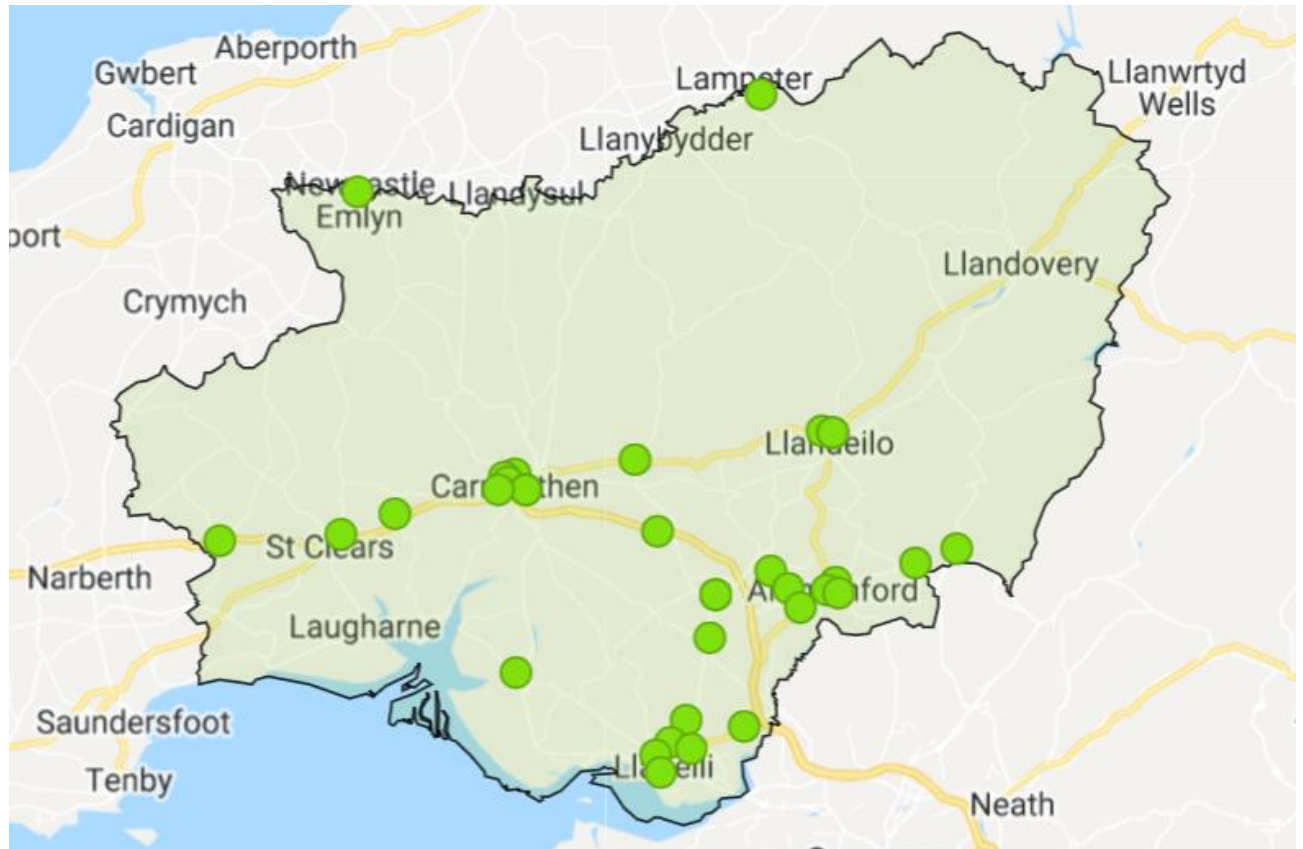
Analysis of Supply of Childcare Provision

- 7.16 In October 2016 there were **42** registered out of school care settings offering **1,161** registered childcare places. In June 2021, the number of registered settings had increased to **44** and the number of registered places had increased by **176** places to **1,337** places. Registered out of school childcare settings can also offer three elements of care: before school care, after school care and holiday care. Some of the day nurseries also provide a combination of out of school facilities.
Some of the day nurseries also provide a combination of out of school facilities.

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

- 7.17 Carmarthenshire County Council's autumn 2021 survey with childcare providers ascertained confirmation on opening times. Of the 25 out of school childcare providers that responded, the average (and the most frequent) opening time for any after school club was 15:00pm. The average finishing time for the after school club was 17:30pm and the most frequent finishing time was 18:00pm.
- 7.18 Carmarthenshire County Council's autumn 2021 survey with out of school childcare providers also provided confirmation that the:
- Average sessional rate for places at an out of school club was £7.10
 - Average sessional rate for places at a breakfast club was £2.70
 - Average sessional rate for places at a holiday club was £20.10
- 7.19 In June 2021, 30% of out of school childcare providers stated that the main language via which their service was provided was Welsh, or that it was [an]other language spoken at their setting (67% of additional respondents).

Fig. 5 - Location of Out of School Providers in Carmarthenshire



OPEN ACCESS PLAY PROVISION (UNREGISTERED)

Analysis of Supply of Childcare Provision

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

Open Access Play Provision still operates in all three Integrated Children's Centres; Llwynhendy, Morfa and Felinfoel (under 2 hours).

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

NANNY

Analysis of Supply of Childcare Provision

- 7.21 In June 2021 there were three nannies registered on the CIW voluntary approval scheme. These were located in the following LSOAs:

1. Gorslas 1
2. Llanboidy
3. Glanamman 2

In comparison, in October 2016 there were no recorded nannies in the county.

BREAKFAST CLUB PROVISION

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

UNREGISTERED CHILDCARE PROVISION

Analysis of Supply of Unregistered Childcare Provision

- 7.22 Within Carmarthenshire there continues to be informal childcare providers that run under 2 hours and are therefore not required to register with Care Inspectorate Wales (CIW). Unregistered provisions include parent and toddler groups, Cylchoedd Ti a Fi, etc.
- 7.23 Parent and toddler groups cater mainly for children under two and a half years old. Parents/carers stay with their children and are responsible for their children, therefore the groups are not required to register with CIW. These groups provide parents and carers the opportunity to mix with others and take part in a wide range of activities.
- 7.24 Cylchoedd Ti a Fi is a Welsh-medium parent and toddler group which allow parents and carers to play alongside their children and communicate in informal Welsh. Non-Welsh speaking parents can attend and are encouraged to learn Welsh with their children. Activities include basic story time, songs and nursery rhymes.
- 7.25 Mudiad Meithrin and Early Years Wales support their parent toddler groups. They are usually based in church halls, community centres and sometimes on school premises.
- 7.26 The Family Information Service send out regular updates to all the County's child carers requesting up-to-date information on the services they offer. In June 2021, there were **40** unregistered childcare parent and toddler groups, Cylchoedd Ti a Fi, in Carmarthenshire according to the Family Information Service records.

8 FREE NURSERY EDUCATION, CHILDCARE OFFER AND FLYING START PROVISION

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

- Early years education is a non-statutory provision available to 3 year olds for 10 hours a week (term-time) at an approved registered childcare setting. This provision be accessed as part of the Childcare Offer. (Part time 3 year old education of 10 or 12.5 hours can also be accessed within 3-11 schools).
- The Childcare Offer for Wales provides up to 30 hours of government funded early education and childcare to 3 and 4 year olds, for 48 weeks per year at a CIW registered childcare setting who has agreed participation. Parents can choose their own childcare provider that meets their child's needs.
- The Flying Start programme helps families with children under 4 years old in disadvantaged areas of Wales. The support available includes part-time childcare for 2 to 3 year olds (12.5 hours per week, 42 weeks of the year).

Parents can choose their own childcare provider that meets their child's needs.

Analysis of part time Early years Education and the Childcare Offer Provision

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

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

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

8.3 As part of the autumn 2021 consultation undertaken by Carmarthenshire County Council with its childcare providers, 36% of representatives of early years childcare

providers/settings, i.e. full day care providers and sessional providers stated that they offered Foundation Phase nursery places for 3-4 year olds, at an average of 7.5 places/s relevant setting. Of these settings, 55% stated that they were experiencing vacant places.

- 8.4 80% of representatives of early years childcare providers/settings, i.e. full day care providers and sessional providers stated that they offered Childcare Offer places for 3-4 year olds, at an average of 8 places/setting. (This compared with 84% of respondents who stated the same as an outcome of the SASS research in June 2021).
Of these professionals, 29% stated that they were experiencing vacant places and 15% stated that they had observed changes in terms of parent's/carer's uptake of Childcare Offer places since the start of the pandemic, which repeatedly was (words to the effect) *"we have places available, but there has been a reduction in demand"*.
- 8.5 87% of registered childminders, stated that they offered Childcare Offer places for 3-4 year olds, at an average of 2 places/childminder.
Of these settings, 54% stated that they were experiencing vacant places and 16% stated that they had observed changes in terms of parent's/carer's uptake of Childcare Offer places since the start of the pandemic, which repeatedly was (again, words to the effect) *"I have places available, but there has been a reduction in demand"*.
- 8.6 It was noted that the autumn 2021 survey with early years childcare providers/settings and registered childminders resulted in 62% of representatives stating that they were aware that the Childcare Offer is moving to a different system, in terms of processing parent applications and payments to providers of Childcare Offer places.
(The Carmarthen area accounted for the highest proportion of such providers who stated that they were not aware).
- 8.7 The autumn 2021 survey indicated that the three localities which accounted for the highest number of Childcare Offer places, as reported by relevant responding providers in autumn 2021 were: 1. Carmarthen Town South; 2. Gorslas and; St. Ishmael.

Analysis of Flying Start Childcare Provision

- 8.8 The **Flying Start programme** in Carmarthenshire continues to offer families with children aged 0-3 years targeted early intervention services.
The Flying Start programme is being extended to another 2,500 children in Wales.

From September 2022, the number of Flying Start target areas in every local authority area in Wales, including Carmarthenshire will be expanded meaning all children under four living in these areas will be able to access Flying Start services, including childcare for those aged two to three. Eligible families will be notified by their local Flying Start team by the summer. Once the Flying Start scheme has been fully rolled out, all families in Wales with children aged two to three years will be eligible for 12.5 hours of funded, high-quality childcare for 39 weeks of the year. Plans for the larger expansion of Childcare will be announced in the autumn.

To meet this target, existing Flying Start childcare providers in Carmarthenshire will be supported to expand their reach, with work ongoing to encourage new providers, including those who specialise in Welsh-medium provision, to offer this provision.

- 8.9 Flying Start Carmarthenshire continue to advertise all new available childcare contracts through a formal procurement tender approach, advertising on the national procurement Sell2Wales website (www.Sell2Wales). (This excludes the Local Authority facilities as they are already managed and deliver in-house services, by Carmarthenshire County Council Flying Start staff).
- 8.10 Welsh Government continue to have three key expectations of the high Quality Flying Start childcare provision:
- High Quality people
 - High Quality environment
 - High Quality experiences for the child

Current Supply of commissioned Flying Start childcare places

- 8.11 The June 2021 SASS responses indicated that 17% (33) of (191) responding providers of childcare providers received funding to deliver Flying Start programme childcare places.
- 8.12 As at **31st December 2016**, Flying Start purchased **412** childcare places and **331** children were benefitting from free childcare providing a take up rate of **80.3%** via this programme.

Table 25 below shows the number of Flying Start childcare places evidently available in March 2022 aligned to each of the relevant LSOAs. It also depicts the commissioning arrangements aligned to the maximum number of English and Welsh places at each commissioned setting. We have taken the decision to show these figures for March 2022 as this relates to the Flying Start programme itself and having undertaken a commissioning exercise in September 2021 securing places up until 2028.

Table 25 - Number of Flying Start childcare places evidently available in March 2022

Name of setting including postcode	LSOA			Provider type			Max Number of FS places		Confirm CIW Registered
	Name	Number	Postcode	LA	voluntary	Private	English	Welsh	
Argel Family Centre	Carmarthen Town South 2	W01000642	SA31 3NQ	√			8		√
Andi Pandis	Pontamman 1	W01000714	SA18 2DB			√	30		√
Little Wizards	Carmarthen Town North	W01000637	SA31 1TE	√			16		√
Ffrindiau Bach	Trimsaran 1	W01000729	SA17 4BE	√				20 am 20 pm	√
Trysor Bach	Betws	W01000627	SA18 2HE	√				14 am 14 pm	√
Sêr Ni'	Llwynhendy 3	W01000708	SA14 9DP	√			20 am	20	√
Tedi Bach	Glanymor 2	W01000660	SA15 2NG		√		20 am 20 pm		√
St Paul's Family Centre	Tyisha 2	W01000733	SA15 1DN		√		16		√
Cylch Meithrin Felinfoel	Felinfoel	W01000655	SA14 8BE		√			24	√
Jellitotz	Glanymor 3	W01001923	SA15 2AP		√		20 am 20 pm		√
Cylch Meithrin Carwe	Llangyndeyrn 1	W01000695	SA17 4HE		√			8	√
Cylch Ysgol Y Bedol	Garnant	W01000656	SA18 2GB		√			28	√
Cylch Meithrin Parcyrhun	Ammanford 1	W01000625	SA18 3HB		√			8	√
Little Towy Toddlers	Carmarthen Town South	W01000641	SA31 1NB	√			10 am 10 pm		√
Ser Ni Bynea	Bynea 1	W01000635	SA14 9LT	√			16 am 16 pm		√
Myrtle House	Bigyn 2	W01000629	SA15 1LH			√	20		√
Childsplay	Tyisha 3	W01000734	SA15 1AU			√	20		√
Once Upon a Time	Tyisha 1	W01000732	SA15 2RH			√	10		√
High Flyers	Dafen 2	W01000652	SA14 8LL			√	10 am 10 pm		√
Little Lighthouse	Pembrey 1	W01000710	SA16 0AU	√			10 am 10 pm		√
Serendipity Dechrau'n Deg	Pembrey 2	W01000711	SA16 0TP			√	10		√
Ffrindiau'r Harbwr	Pembrey 1	W06000010	SA16 0AU	√				19 am 19 pm	√
Brambly Hill	Dafen 2	W01000652	SA14 8QF			√	0		√
Camau Tirion	Bynea 2	W01000636	SA14 9ET			√		0*	√
Eco Tywi	Carmarthen Town South 1	W02000149	SA311LR		√			0*	√
Pobl Bach	Llangunnor 2	W01000694	SA31 2BL			√		0*	√

Name of setting including postcode	LSOA			Provider type			Max Number of FS places		Confirm CIW Registered
	Name	Number	Postcode	LA	voluntary	Private	English	Welsh	
Serendipity Nursery	Pembrey 2	W01000711	SA16 0TP			√	0*		√
Camau Tirion Heol Goffa	Lliedi 3	W01000705	SA15 3EJ			√	0*		√
							322	194	

* Additional Flying Start places are available if required

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

Essentially, there are a total of 28 contracted childcare providers ranging from private day nurseries, voluntary based provision (playgroups and Cylchoedd Meithrin) and 9 internal Local Authority settings, that are commissioned to provide Flying Start programme childcare places in spring 2022, 11 of these childcare providers are Welsh medium settings and noted in grey cells in Table 26 below.

Table 26 - Clarification on English-medium settings and Welsh-medium settings providing Flying Start places in March 2022

Private	Voluntary	Local Authority
High Flyers	Meithrinfa Tedi Bach	Ffrindiau Bach Trimsaran
Once Upon a Time	Cylch Meithrin Parcyrhun	Trysor Bach Betws
Myrtle House	Cylch Meithrin Y Bedol	Little Wizards Myrddin
Andi Pandi	Cylch Meithrin Felinfoel	Argel
Serendipity Flying Start	Cylch Meithrin Carwe	Little Towy Toddlers
Camau Tirion- Heol Trallwm	Jellitotz Playgroup	Ffrindiau Harbwr
Camau Tirion- Heol Goffa	St.Paul's Family Centre	Little Lighthouse
Childsplay Nursery	Eco Tywi	Ser Ni Bynea
Brambly Hill nursery		Ser Ni Llwynhendy
Pobl Bach Llangynnor		
Serendipity Nursery		

9. BREAKFAST CLUB PROVISION

Analysis of Breakfast Club Provision

- 9.1 In September 2021 there was one nursery school and 95 infant and primary schools throughout Carmarthenshire. All of these were operating a free breakfast club.

Table 27 below lists all the nursery, infant and primary schools in Carmarthenshire who take part in the breakfast club initiative and shows the places available.



Table 27 - Free Breakfast Club accessibility in September 2021

Name of school	Average Daily Eating	Places Available	% Uptake of Places
AMMANFORD	20	80	25%
CEFNEITHIN	30	91	33%
DREFACH	13	46	29%
LLECHYFEDACH	26	109	24%
TUMBLE	30	131	23%
GORSLAS	45	145	31%
CROSSHANDS	35	136	26%
LLANGAIN	19	38	51%
PENIEL	37	116	32%
BANCCFFOSFELEN	38	52	72%
GWYNFRYN	9	54	16%
CARWAY	17	59	29%
PONTIETS	26	34	76%
PONTHENRI	18	67	26%
BANCYFELIN	25	45	56%
MEIDRIM	7	31	23%
SARON	54	234	23%
BETWS	11	65	16%
TYCROES	41	185	22%
PARCYRHUN	62	202	30%
BLAENAU	14	38	37%
LLANEDI	7	29	26%
FFAIRFACH	12	93	13%
TALLEY	8	47	18%
CWRT HENRI	15	52	29%
LLANGADOG	19	83	23%
RHYS PRITCHARD	32	210	15%
LLYS HYWEL	20	142	14%

Name of school	Average Daily Eating	Places Available	% Uptake of Places
BRYNSARON	9	52	18%
LLANPUMSAINT	8	30	26%
MYNYDD Y GARREG	9	36	24%
JOHNSTOWN	126	452	28%
LLANMILOE	27	72	38%
BRYN	47	234	20%
BYNEA	73	180	41%
DAFEN	20	130	16%
FIVE ROADS	29	94	30%
LLANGENNECH INF	46	386	25%
LLANGENNECH JUN	50	n/a	n/a
HENDY	37	194	19%
FURNACE	99	446	22%
OLD ROAD	24	145	17%
LLANSTEPHAN	11	31	37%
LLANNON	64	89	72%
BRYNSIERFEL	54	195	28%
BRYNAMMAN	81	289	28%
MYRDDIN & SP UNIT	46	124	37%
LLANGUNNOR	74	304	24%
TRIMSARAN	36	199	18%
SWISS VALLEY	29	224	13%
PARC Y TYWYN	28	247	11%
PEMBREY	46	219	21%
AMMANFORD WELSH	67	282	24%
YSGOL BECCA	16	56	28%
LLANDYBIE	48	220	22%
HAFODWENOG	26	47	55%
LLANYBYDDER	42	69	61%
LLANDEILO	16	226	7%
CYNWYL ELFED	23	59	39%
HALFWAY	31	228	14%
PWLL	23	76	31%
PENYGAER	60	196	31%
CASTELL	23	228	10%
PENYGROES	44	170	26%
NANTGAREDIG	43	198	22%
GWENLLIAN	21	124	17%
DEWI SANT	56	419	13%
PONTYBEREM	54	231	23%
BIGYN	8	204	4%
STEBONHEATH	34	270	13%
YSGOL Y DDWYLAN	32	270	12%
RICHMOND PARK	31	187	16%

Name of school	Average Daily Eating	Places Available	% Uptake of Places
YSGOL Y FRO	5	22	24%
GRIFFITH JONES	108	312	35%
CARREG HIRFAEN	8	150	6%
CAERFELIN	22	102	22%
YSGOL Y BEDOL	94	300	31%
YSGOL BRO BRYNACH	13	80	16%
BRYN TEG	65	250	26%
YSGOL Y FELIN	14	248	6%
BRO BANW INF	53	472	27%
BRO BANW JUN+SP UNIT	76		
MAES Y MORFA	99	211	47%
BURRY PORT COMMUN	21	204	10%
PEN RHOS	113	453	25%
ABERGWILI	20	43	46%
LAUGHARNE	17	74	23%
LLANDDAROG	14	79	17%
FERRYSIDE	11	27	42%
LLANLLWNI	17	38	45%
ST MARYS LLANELLI	16	184	8%
ST MARYS CARMARTHEN	18	50	35%
PENBOYR	17	82	21%
PENTIP	21	108	20%
MODEL VCP	98	402	24%
RHYDYYGORS	21	34	61%

The county also has two fee paying breakfast/care clubs: Ysgol Teilo Sant and Ysgol y Dderwen.

Opening times of the free breakfast clubs and fee paying breakfast clubs vary with fee paying clubs opening earlier.

10. TAX FREE CHILDCARE, UNIVERSAL CREDIT AND EMPLOYER SUPPORTED SCHEME

Tax Free Childcare

- 10.1 Tax Free Childcare is a programme whereby parents/families can receive up to £500 every 3 months (up to £2,000 a year) for each of their children to help with the costs of childcare. This goes up to £1,000 every 3 months if a child is disabled (up to £4,000 a year). The scheme is open to all parents of children under 12 (or under 17 if disabled).

To be eligible for the Tax-free Childcare Scheme, a parent must be working (and if they have a partner they must work too), and they must not be receiving any support through Tax Credits or Universal Credit. Most parents who are eligible for Universal Credit or Tax Credits can save more money using the childcare elements of these benefits instead of using Tax-Free Childcare.

Usually both parents in a couple must work on an employed or self-employed basis and have an income of at least £142.56 per week. Recently self-employed people are allowed start-up periods where this income level doesn't have to be met or can use an average over the tax year. However, there is evidence suggesting that the Tax-Free Childcare programme in its current format is not working to help parents and families (from all types of backgrounds) access quality childcare. The programme in its entirety currently has a significant underspend.

Universal Credit

- 10.2 Universal Credit is a means-tested benefit for people of working age who are on a low income.

It replaced six means-tested benefits:

- Income Support
- Income-based Jobseeker's Allowance (JSA)
- Income-related Employment and Support Allowance (ESA)
- Housing Benefit
- **Child Tax Credit**
- **Working Tax Credit.**

Parents are able to claim back up to 85% of their childcare costs if they are eligible for Universal Credit (or 70% if they are in receipt of tax credits). A parent (and their partner if they live with them) will usually need to either be working. The most a parent/family can claim each month is:

- £646 for one child
- £1,108 for 2 or more children

Employer Supported Scheme Analysis

- 10.3 Some employers offer vouchers towards childcare costs for parents, often known as a salary sacrifice' scheme. Only those signed up to a voucher scheme, prior to October 2018, can continue in this scheme (unless their employer brings it to an end).

If a parent signed up to a childcare voucher scheme prior to October 2018, they would have stayed with the same employer and have continued to receive vouchers and are paid less in their wages but are given vouchers instead. Some employers may give an employee the voucher on top of their wages, but this is less usual.

- 10.4 73% of early years childcare providers/settings, i.e. full day care providers and sessional providers who responded to the autumn 2021 consultation with childcare providers stated that they were registered for facilitating parents/carers to access Tax Free Childcare. Those who were not registered repeatedly stated that (words to the effect) *"we only offer Flying Start funded places"*, followed in frequency by words to the effect *"we are looking into this"*.

In terms of promoting Tax Free Childcare, 65% of early years childcare providers/settings (also) stated that they did actively do so and 35% stated that they did not.

In terms of promoting Tax Free Childcare, 92% of childminders (also) stated that they actively do so.

Finally, 80% of out of school childcare providers stated that they were registered for facilitating parents/carers to access Tax Free Childcare. In terms of promoting Tax Free Childcare, 60% of out of school childcare providers (also) stated that they did actively do so.

- 10.5 Additionally, in response to the June 2021 SASS Self Assessment of Service Statement, 71% of the responding full day care providers and sessional providers stated that (to the best of their knowledge) the parents of the children that they care for were (in June 2021) receiving tax free childcare or using childcare vouchers. 73% of the responding out of school childcare providers stated that (to the best of their knowledge) the parents of the children that they care for were (in June 2021) receiving tax free childcare or using childcare vouchers.

96% of childminders stated that they were registered for facilitating parents/carers to access Tax Free Childcare.

- 10.6 73% of early years childcare providers/settings, i.e. full day care providers and sessional providers stated that they were registered for facilitating parents/carers to access Tax Free

Childcare. Those who were not registered repeatedly stated that this (words to the effect) we only offer Flying Start funded places, followed in frequency by words to the effect “we are looking into this”.

In terms of promoting Tax Free Childcare, 65% of early years childcare providers/settings (also) stated that they did actively do so and 35% stated that they did not.

- 10.7 It can be noted that as part of the October 2021 Welsh Government parental survey each parent/carer was requested to state whether they received any help towards meeting the cost of their childcare and
- 11.5% of responding parents/carers stated: (yes, the) childcare element of the Working Tax/Universal Credit
 - 19.5% of responding parents/carers stated: (yes, the) Childcare vouchers/Tax Free Childcare
 - 0 responding parents/carers stated: (yes, the) Childcare Grant for Students
 - Only 1 responding parents/carers stated: (yes, a) Employer contribution

CONSULTATION WITH EMPLOYERS

Online questionnaire analysis

- 10.8 The Welsh Government Childcare Sufficiency Assessment Guidance 2016 advises that Local Authorities should consult with local employers of all sizes and backgrounds/sectors. This ambition was particularly important for the 2022 Childcare Sufficiency Assessment given the changes to the way the labour market operated and reacted as an outcome of the COVID-19 pandemic. Essentially, nationally there has been observed an increase in the incidence of employees working from home and not working in an office space and environment, for which some may require the provision of formal childcare. This increase in the incidence of working from home has meant that some parents/carers have (also) been providing childcare in their home, particularly for pre-school aged children, as opposed to them accessing a formal childcare provider such as full day care nursery or a childminder.

Therefore, in November 2021, Carmarthenshire County Council focused on attaining feedback from its varied employment sector and widely publicised and promoted an online survey.

Eleven employers responded to this survey, which was completable in either a Welsh or English version. These employers ranged in size from the local authority, which employs 8,000 people and to a fuel distribution company employing 20 people. All of the responding employers' feedback is collectively summarised in the section below.

Key logistic detail about responding employees

- 10.9 Responding employers, in late 2021, ranged in size from them having 8,000 employees in their organisation to 20.

The average percentage of female employees in each responding organisation was 49%, (with the highest percentage being 79%).

The average percentage of male employees in each responding organisation was 51%, (with the highest percentage being 90%).

- 10.10 Table 28 indicates the percentage of employers' workforces that (to the best of their knowledge) had children aged 0-18 years.

Table 28 - Percentages of workforces who had children aged 0-18 years

Employer stated that to the best of their knowledge, this was the percentage of their workforce with children aged 0-18 years	Percentage of employers
None	0
Up to 25%	0
Up to 50%	33%
Up to 75%	0
All my employees	0
Don't Know	66%

- 10.11 All responding Carmarthenshire locality based employers were invited to state whether they implemented/enabled specific types of irregular working hours for their employees/workforce.

Table 29 - Incidence of responding employers implementing types of flexible working arrangements

Type of flexible working arrangement	Percentage of employers offering
Weekends	33%
Shift Patterns	83%
Work evenings after 6pm	50%
Overnight	66%
Working before 8am	50%
Working bank holidays	50%
Working annualised hours	33%
Annualised hours	33%
Compressed hours	33%
Job Share	33%

Type of flexible working arrangement	Percentage of employers offering
Flex-time	33%
Part-time	83%
Term-time hours	0
Voluntary reduced hours	66%
Career break	33%
9-day fortnight	33%
Other(s)	0

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

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

Opinions about childcare in the Carmarthenshire locality

10.13 Representatives of employers were invited to state whether, in their personal opinion, if there was enough formal registered childcare provision across the locality?
None stated that they believed that there was; one stated that they believed there was not and seven stated: I don't know.

10.14 Responding employers were also asked: How frequently do you experience problems with employees not continuing to work in your organisation following a maternity/paternity leave? The most frequent response was that this “rarely” happens, stated by 83% of respondents. One employer (a wholesale and distribution company) stated that this happens “sometimes”.

Effects of COVID-19

10.15 Representatives of employers were invited to state whether they could contrast a percentage of their Carmarthenshire-based employees that were working from home before the pandemic and after the pandemic.

The average percentage that were working from home before the COVID-19 pandemic was less than 10% and;

The average percentage that were working from home after the COVID-19 pandemic was 30%, with two employers stating (words to the effect) “the majority of our office-based employees are now working from home”.

Two additional examples of feedback on this point were:

“Some staff have been anxious about using childcare provision and have been wanting to work from home more frequently... or spend shorter days in the office”.

“We do worry about what level of attention an employee is able to contribute when their child is at home”.

- 10.16 Responding employers were asked: To the best of your knowledge, have any of your employees who are parents stopped using registered childcare (such as nursery, childminder or out of school club) as an outcome of COVID-19. 50% of representatives stated that they knew that this had been the case and one-third stated that in their experience the COVID-19 pandemic combined with childcare challenges had been directly responsible for one or more of their employees exiting their job.

Financial support and childcare

- 10.17 83% of employers stated that they offered childcare-themed benefits to their employees, which were either:

- On-site provision
- Flexible working policies
- Financial assistance towards childcare

- 10.18 In terms of information and financial support, only the local authority stated that it informed their employees/workforce about the Flying Start programme/childcare places, the Childcare Offer and/or Tax Free Childcare.

- 10.19 Representatives of employers were invited to state whether they were aware of the existence of Carmarthenshire Family Information Service. 50% stated that they were (including as would be expected the representatives of Carmarthenshire County Council) – however, 50% stated that they were not, and one employer (from the manufacturing sector) stated: I do not know what this is.

11. SUSTAINABILITY AND COVID-19

Direct Grants/funding for Childcare Providers in 2020-2022

- 11.1 Essentially, as part of the November 2021 survey with childcare providers all (representatives of) Carmarthenshire-based childcare providers were invited to state what their setting would most welcome as continued support, advice and guidance from Carmarthenshire County Council over the forthcoming year 2022. The three repeated types of feedback were (in order of frequency):

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

CIW De-registrations 2021-22

- 11.2 With regard to theme of sustainability, it can be noted that during the period March 2021-March 2022:

In terms of registered childminders, there were 6 new CIW registrations and 10 CIW de-registrations within the Carmarthenshire locality.

There were no new Full Day Care Registrations and 3 CIW de-registrations within the Carmarthenshire locality.

In terms of sessional care there were 9 new CIW registrations: 7 cylchoedd and 2 Flying Start Provisions with 2 Flying Start Provisions deregistering and 6 cylchoedd deregistrations (5 cylchoedd meithrin's changed their CIW registration from sessional to full day care).

In terms of out of school childcare provisions, there were no new CIW registrations and 8 CIW de-registrations within the Carmarthenshire locality.

Other issues impacting on sustainability of childcare settings

- 11.3 The narrative and analysis below present outcomes of the autumn 2021 structured survey with (167) childcare providers across the Carmarthenshire locality which focus on the

theme of sustainability, including a review of how sustainability funding evidently supported the sector.

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

Fig. 8 - Incidence of issues being experienced by setting/group-based providers as an outcome of COVID-19

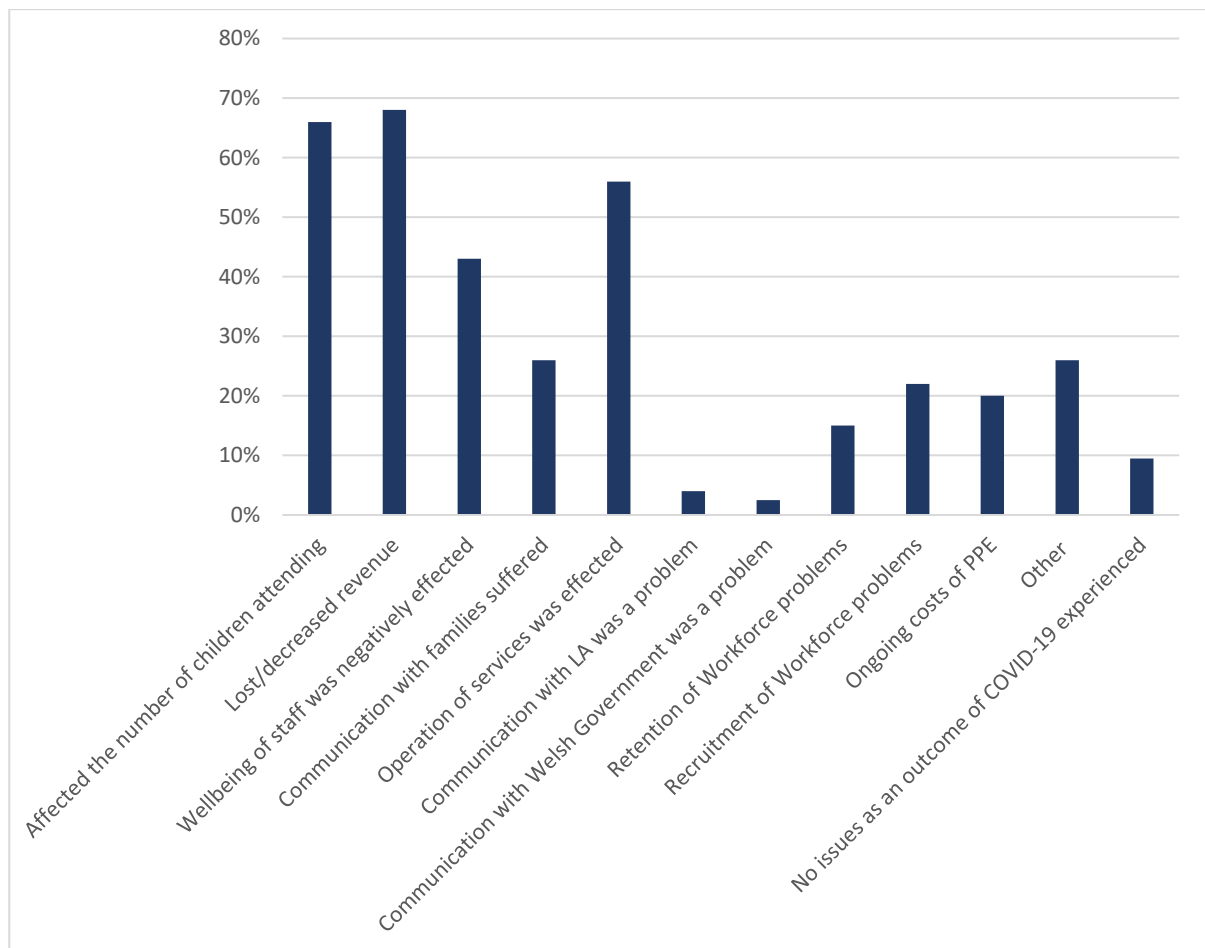


Fig. 8 shows early years childcare and out of school childcare providers/settings collective feedback about the incidence of any issues or challenges experienced as an outcome of COVID-19.

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

Those that stated 'Other' feedback issues including (in order of frequency):

- Challenges in recruiting Welsh speaking staff
- Challenges with staff "feeling under pressure"

- Decreased opportunities to fundraise
- Concerns when staff refused to have a vaccine

Fig. 9 - Incidence of issues being experienced by registered childminders as an outcome of COVID-19

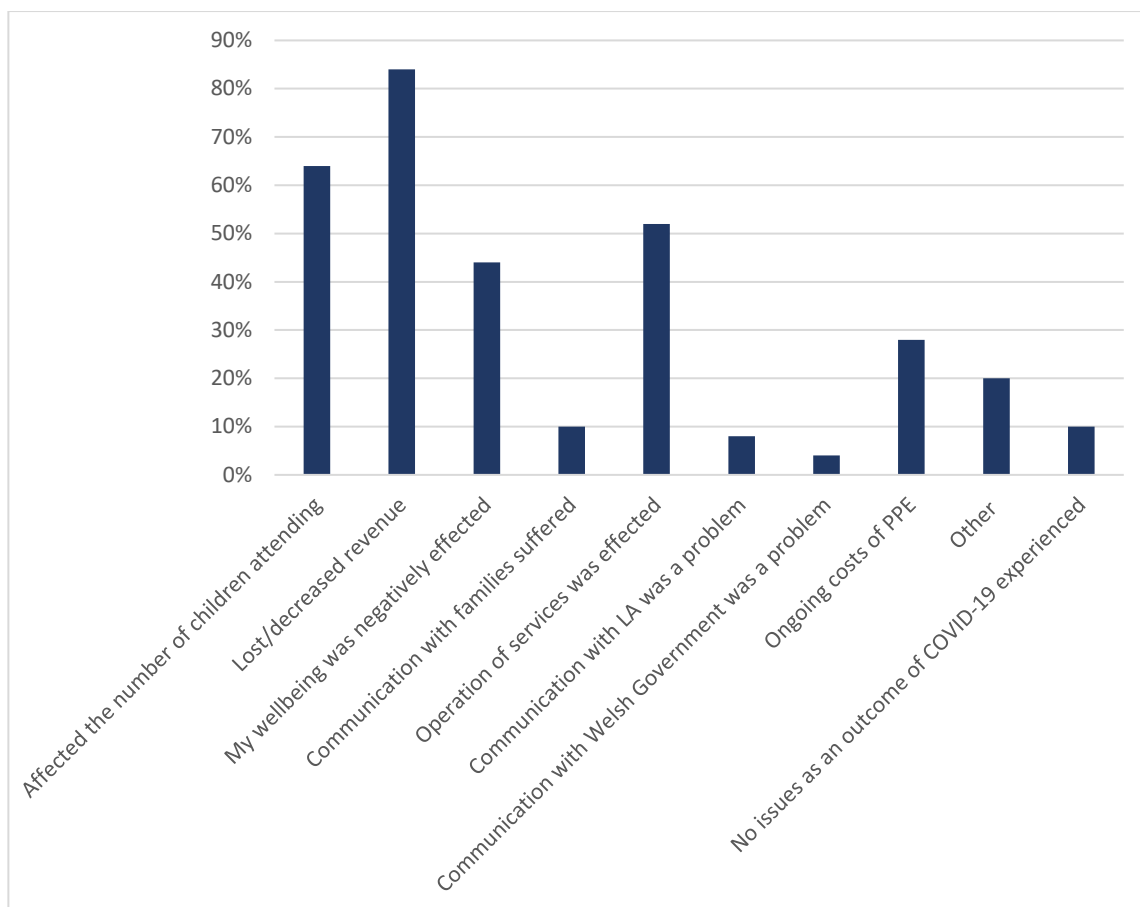


Fig. 9 shows registered childminders most frequently outlined how they had 'lost/decreased revenue' as an outcome of the COVID-19 pandemic, and these relevant respondents were most frequently resident in the Dinefwr area. The location that accounted for the highest incidence of a childminder stating 'affected the number of children' was also the Llanelli area.

11.5 Only 17% of early years childcare providers stated in autumn 2021 that they had to change their business model as an outcome of the COVID-19 pandemic. In majority of cases their adaptation was to "Open more flexible hours".

24% of out of school childcare providers stated in autumn 2021 that they had to change their business model as an outcome of the COVID-19 pandemic, and this was evidently most frequently to "open fewer hours".

Finally, 16% of registered childminders stated in autumn 2021 that they had to change their business model as an outcome of the COVID-19 pandemic, with repeated adaptations being:

- To reduce the service to 3-days/week
- To (begin to) offer weekend and/or overnight childcare

11.6 All of Carmarthenshire’s childcare providers were subsequently invited to state whether they/their setting would benefit from advice, support and/or training with short and/or medium term business modelling. 14% stated that they would and:

- 12.5% stated that they would welcome support, training and advice with business modelling and sustainability strategies
- 5.5% stated that they would welcome support, training and advice with traditional marketing
- 7% stated that they would welcome support, training and advice with virtual marketing

11.7 23% of Carmarthenshire childcare providers stated that they had some type of plan(s) to continue to re-energise income generation other than via getting back to pre-COVID-19 occupancy levels. Repeated plans were:

- Undertaking more social media targeted marketing
- Undertaking fundraising campaigns
- Facilitating a parent and toddler type group
- Applying for (more) grants

11.8 Each of the Carmarthenshire locality’s formal childcare providers were also asked in autumn 2021 whether they had any plans/intentions to increase their capacity/develop new provision over the forthcoming 2 years. 14% stated that they did have typically/repeatedly through means including “moving to a new building”, “increasing capacity” and/or “opening up to younger children or babies” and collectively this totalled 180 new places, which when aligned to locality could be categorised as follows:

Table 30 - Locations of intentions to develop new places

Area provider(s) located in	Number of proposed new places with early years childcare providers	Number of proposed new places with out of school childcare providers	Number of proposed new places with registered childminders
Carmarthen Town North	28	0	0
Dafen	40	0	0
Carmarthen Town West	23	0	0
Elli	10	0	0
Llangennech	10	0	0
Quarter Bach	8	0	0
Whitland	8	0	0
Llanbydder	6	0	0
St. Ishmael	6	0	0

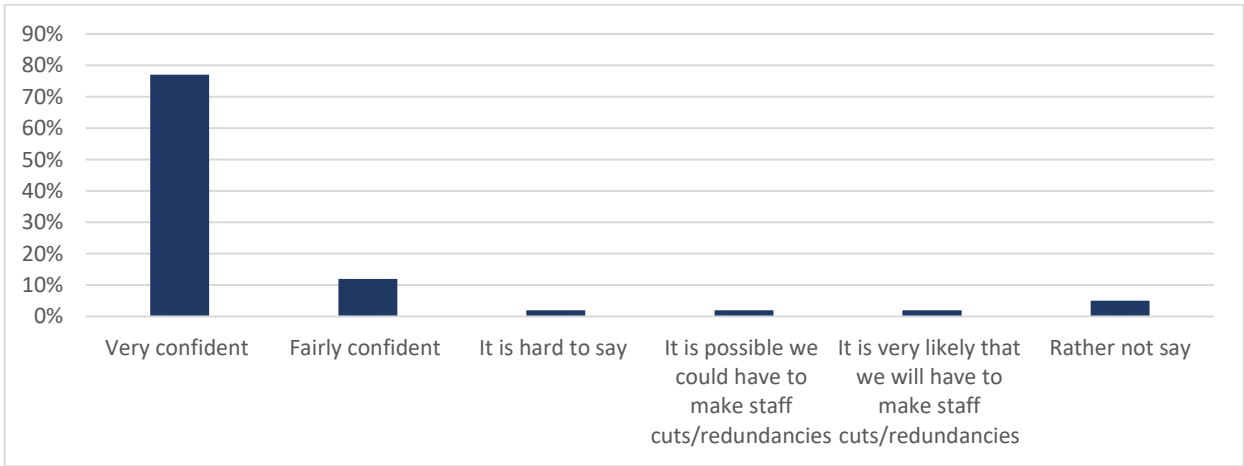
Llannon	5	0	0
Garnant	0	24	0
Cenarth	0	20	0
Bigyn	0	0	3
Glyn	0	0	2
Llangeler	0	0	3
Llangyndeyrn	0	0	2
Totals	136	44	10

11.9 In autumn 2021, 9.5% of Carmarthenshire’s formal: (a) early years childcare providers and (b) out of school childcare providers stated that they had accessed the Coronavirus (COVID-19) Business Interruption Loan Scheme and were most frequently located in the Carmarthen area. 8.5% of Carmarthenshire’s formal: (a) early years childcare providers and (b) out of school childcare providers also stated that they had accessed the Coronavirus Bounce Back Loan Scheme and in this case they were most frequently located in the Llanelli area. A repeated type of feedback on both schemes included: “... *the payment was helpful in sustaining our business*”. Two early years childcare providers stated: “*we would not have survived without it*”.

11.10 However (significantly more), 70% of Carmarthenshire’s formal: (a) early years childcare providers and (b) out of school childcare providers stated that they had accessed the (pivotal) Coronavirus Job Retention Scheme (CJRS).

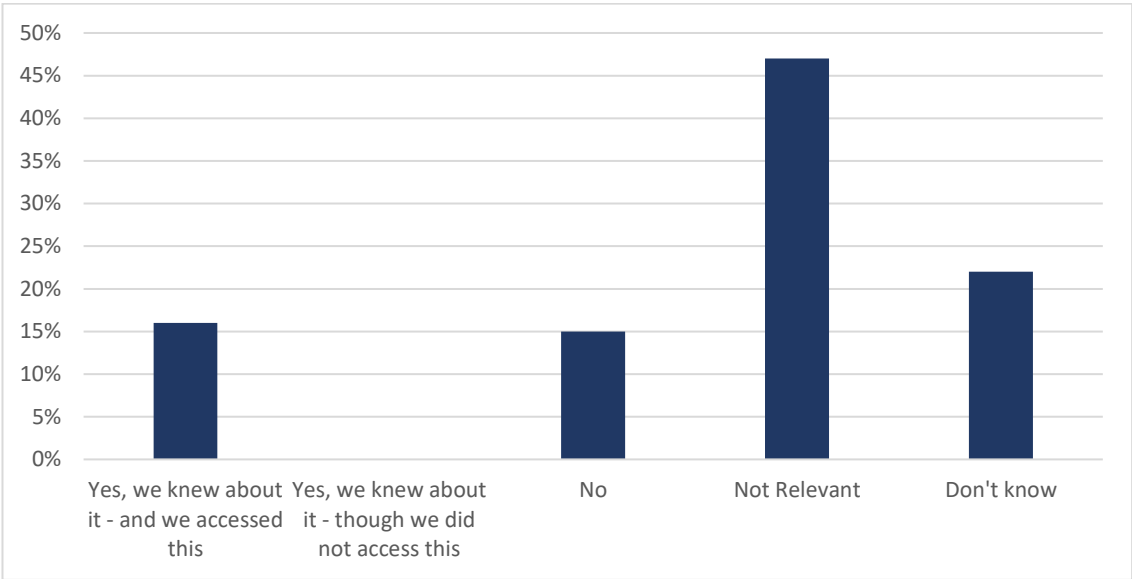
All relevant: (a) early years childcare providers and (b) out of school childcare providers were requested to state how confident they were in autumn 2021 that they would be able to retain their current staff team as an outcome of the conclusion of the Coronavirus Job Retention Scheme.

Fig. 10 - Levels of confidence in retaining staff



11.11 Subsequently, Fig. 11 below indicates responses that were received from: (a) early years childcare providers and (b) out of school childcare providers about (their understanding about) eligibility for the Business Rates Relief/Holiday due to COVID-19.

Fig. 11 - Responses from Carmarthenshire’s settings and groups about eligibility for the Business Rates Relief

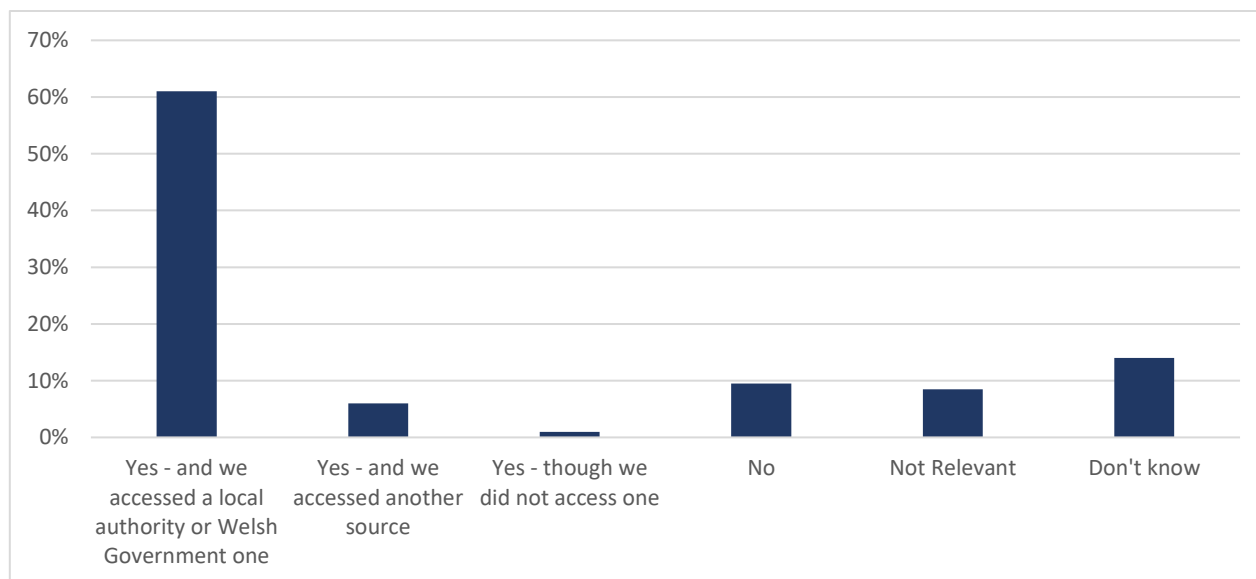


It can be noted that 0 out of school providers stated that they accessed the Business Rates Relief/Holiday scheme, only early years childcare providers stated that this applied to them.

It can also be noted that only 21% of responding early years childcare providers stated that they were aware that the Business Rates Relief scheme was extended for 3 years until March 2025. The other 79% stated that they were not aware of this fact.

11.12 The theme of awareness of the potential ability to receive a Welsh government and/or Carmarthenshire County Council originating sustainability grants was highlighted with setting-based childcare providers, as was whether they had accessed one at any point.

Fig. 12 - Feedback on awareness eligibility for sustainability grants



Those early years childcare providers, who stated that they had accessed a grant were most frequently located in the Carmarthen area. In order of frequency the origins of the grants that were accessed were:

- Carmarthenshire County Council (80% of relevant childcare providers)
- Welsh Government (7%)
- Mudiad Meithrin (4%)

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

Fig. 13 - Responses from (a) early years childcare providers and (b) out of school childcare providers on length of time they expected to continue in business

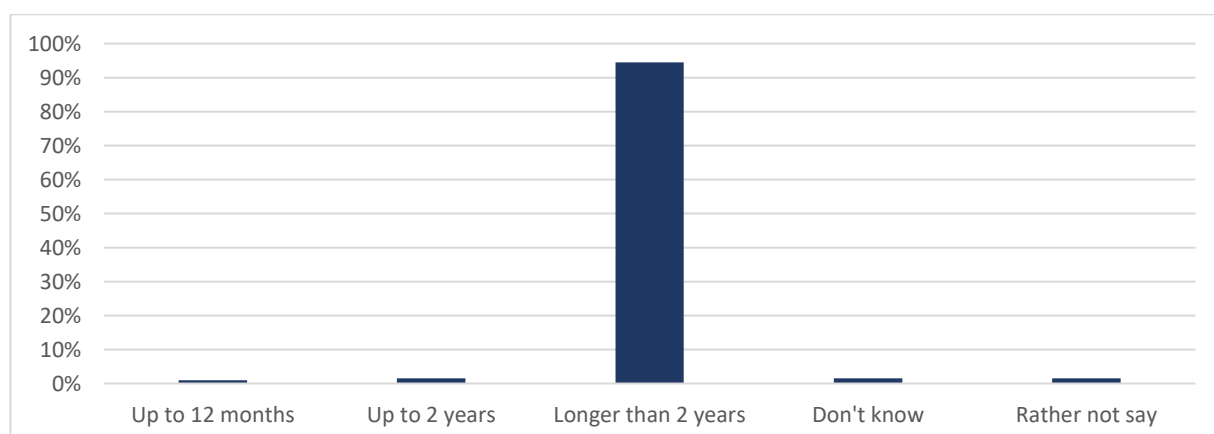
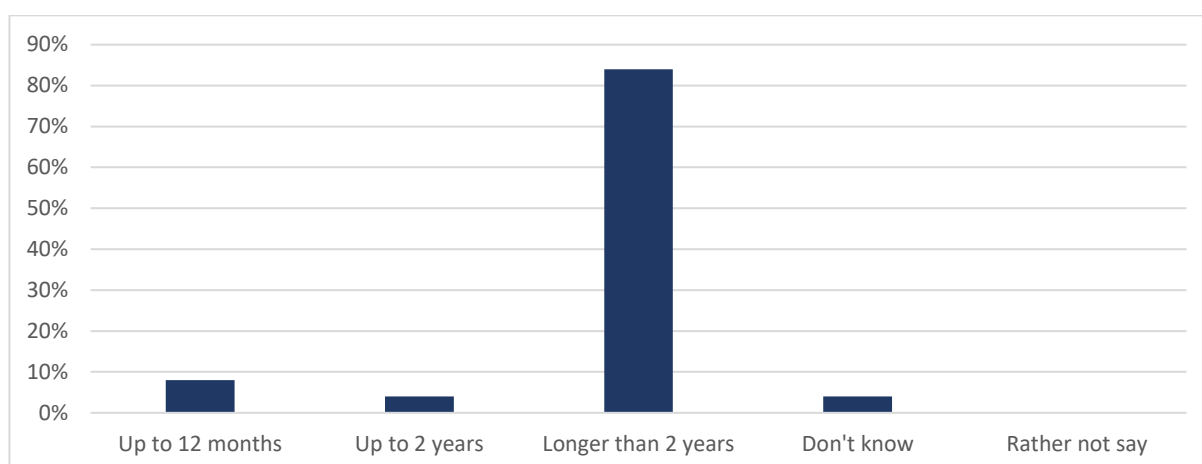


Fig. 14 - Responses from registered childminders on the length of time they expected to continue in business



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

11.14 Early years childcare providers and out of school childcare providers were invited to summarise details on plans aligned to sustainability over the next 18 months (up to spring 2023).

Table 31 - Incidence of plans aligned to the theme of ongoing sustainability and support to families, up to spring 2023 (early years childcare providers and out of school childcare providers)

Increase your fees for paid places/provision?		
Yes plans in place = 36%	No plans, but maybe = 34%	No plans – will not happen = 70%
Further enhance provision for children with additional learning needs?		
Yes plans in place = 28%	No plans, but maybe = 57%	No plans – will not happen = 15%
Extend your opening hours?		
Yes plans in place = 7.5%	No plans, but maybe = 16%	No plans – will not happen = 76.5%
Expand the number of Welsh-medium places that are offered?		
Yes plans in place = 23%	No plans, but maybe = 16%	No plans – will not happen = 61%
Help better meet the needs of shift workers/those who work outside typical office hours?		
Yes plans in place = 8.5%	No plans, but maybe = 14.5%	No plans – will not happen = 77%

Table 32 - Incidence of plans aligned to the theme of ongoing sustainability and support to families, up to spring 2023 (childminders)

Increase your fees for paid places/provision?		
Yes plans in place = 21%	No plans, but maybe = 20%	No plans – will not happen = 29%
Further enhance provision for children with additional learning needs?		
Yes plans in place = 8%	No plans, but maybe = 62%	No plans – will not happen = 70%
Extend your opening hours?		
Yes plans in place = 0	No plans, but maybe = 6%	No plans – will not happen = 94%
Expand the number of Welsh-medium places that are offered?		
Yes plans in place = 10%	No plans, but maybe = 8%	No plans – will not happen = 82%
Help better meet the needs of shift workers/those who work outside typical office hours?		
Yes plans in place = 12%	No plans, but maybe = 6%	No plans – will not happen = 82%

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

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

11.16 The June 2021 SASS Self Assessment of Service Statement also provided useful insight with regard to the theme of sustainability. For example:

70% of responding childcare providers stated that they had had to close at some point in time, up to that point, as a result of COVID-19. The 2021 SASS Self Assessment of Service Statement invited childcare providers to respond to the following question: Due to COVID, are you currently operating at full capacity (in June 2021)? 64% of childcare providers stated: Yes and 36% stated: No.

11.17 Finally, with regard to theme of sustainability, it can be noted that during the period March 2020 – March 2022:

- In terms of early years childcare provisions/settings, there were 18 new CIW registrations and 14 CIW de-registrations within the Carmarthenshire locality
- In terms of registered childminders, there were 11 new CIW registrations and 20 CIW de-registrations within the Carmarthenshire locality

- In terms of out of school childcare provisions, there were 6 new CIW registrations and 10 CIW de-registrations within the Carmarthenshire locality.

Effects of COVID-19 on the Carmarthenshire early years and childcare sector

11.18 As of January 2022, the total number of COVID-19 positive cases across the county was 33,550.

11.19 National research undertaken during the period 2020 – early 2022 was showing that the mental health and wellbeing of: (a) proprietors and (b) staff at all levels within the childcare businesses is being affected by the challenges created by COVID-19.

As part of the autumn 2021 survey with Carmarthenshire locality-based childcare providers, the local authority asked whether respondents had seen any examples of COVID-19 related mental health problems, including aligned to stress and anxiety about (COVID-themed) sustainability?

- 27% of actual respondents representing childcare providers (typically childminders, proprietors and managers) stated that they had personally experienced mental health challenges and/or anxiety and respondents were most frequently located in the Carmarthen area.
- 30% of respondents stated that there had been examples of team members experiencing mental health challenges and/or anxiety and respondents were most frequently located in the Carmarthen area.
- 43% of respondents stated that there had not been any examples of team members experiencing mental health challenges and/or anxiety.

Relevant respondents provided examples of support, help or advice that they would like the County Council to provide to the sector with this issue, with the three most frequent being (in order of frequency):

1. Continued facilitation of training and course on the subject of mental health and wellbeing
2. Continuing to promote a sense of 'value' in the role of childcare professionals and the childminding profession
3. Continuing to understand that the childminding profession can be an *"isolated experience"*.

11.20 All childcare providers were invited to state how they would broadly classify how their parents/families were feeling in terms of their child(ren) (re)attending your setting, aligned to COVID-19. 94% of respondents stated that: The majority seem to be happy now, with the other 6% stating: it is a fairly even split between those in favour and those with continuing concerns.

- 11.21 All childcare providers that responded to the autumn 2021 survey were requested to state whether they made any contractual changes with any parents/carers, as a result of COVID-19.

Fig. 15 - Incidence of contractual changes made by Carmarthenshire childcare providers aligned to COVID-19



- 11.22 All childcare providers that responded to the autumn 2021 survey were requested to state whether they would welcome any further advice or support in terms of a COVID-19 ‘protect your setting’ policy/risk assessment, or a staff and parent policy/protocol. (Only) 6.5% stated that they would and these childcare providers most frequent request was for “*guidance to be clearer, at times*”, and the over-riding feeling was that all childcare providers were now adept in responding to any COVID-19 contingencies.

- 11.23 Additionally, the June (though July 2021 published) 2021 SASS Self Assessment of Service Statement responses highlighted how:

23% of responding childcare providers stated that they had seen positive case(s) of COVID-19 before June 2021, with 56% of such providers stating that they had had at least one staff member have COVID-19 (too, as well as the[ir] children).

(Only) 5% of responding childcare providers stated that COVID-19 had affected their staffing ratios and that they had lost staff as a result of COVID-19.

12. CROSS BORDER

12.1 Carmarthenshire is a predominately rural County and sparsity and geographical isolation can have important implications on childcare. Carmarthenshire's border counties include; Ceredigion, Pembrokeshire, Powys, Neath Port Talbot and Swansea. Therefore, it is important to take into account the number of parents/carers living in the County who are accessing childcare elsewhere and vice versa.

12.2 In response to the Welsh government parental survey in October 2021:

Five parents that were evidently resident in the county of Carmarthenshire stated that they accessed a funded early education place in a different local authority area. Three parents that were evidently resident in the county of Carmarthenshire stated that they accessed Childcare Offer in a different local authority area.

12.3 Family Information Services continues to hold details of childcare providers and service providers based within their Local Authority area. However, some families require information on services and childcare provision within their bordering counties. Carmarthenshire Family Information Service also works very closely with neighbouring FIS's and has signposted families to their counterparts in other areas. Carmarthenshire FIS also receive enquiries from other local authorities requesting information.

13. WORKFORCE DEVELOPMENT AND TRAINING

- 13.1 The following section presents feedback that was received via the: (a) June 2021 SASS Self Assessment of Service Statement responses from childcare providers situated in the Carmarthenshire locality and; (b) the outcomes of the autumn 2021 survey with the same stakeholders/providers.

It focuses on the: (a) Carmarthenshire locality childcare and early years workforce and; (b) their perceived training needs, including those that align to the National Minimum Standards for Regulated Childcare (NMS) and which focus on themes including opportunities for play and learning, nurturing and well-being, behaviour, conduct and management of the service, equal opportunities and child protection.

For **full day care**, the National Minimum Standards stipulate that for full day care settings all nursery practitioner roles or above require a Level 3 qualification.

The Level 5 Advanced and Level 5 Management are designed to support the continued professional development of workers who possess a Level 3 and wish to further develop their practice.

For **sessional day care** the National Minimum Standards state that Assistants working within a sessional care setting should have a Level 2 qualification with all other roles needing a Level 3.

Within the **out of school childcare sector** at least 50% of the staff within a supervisory role should have at least a level 3 with non-supervisory staff needing a qualification relevant to their post. Persons in Charge of out of school childcare settings/playschemes were required from September 2018 to hold a recognised Level 3 Play qualification.

All **childminders** must have successfully completed the new IHC/PCP qualification to understand how to set up a home based childcare service unit. The majority of childminders will have successfully completed these units prior to becoming registered (there are some childminders who will not have this as they registered prior to these qualification requirements).

As in 2017, the Family Information, Childcare and Play Team continue to co-ordinate subsidised termly training programmes which include the mandatory courses required to comply with National Minimum Standards/CIW; Paediatric First Aid, Food Safety/Hygiene and Child Protection and Safeguarding. Sufficient courses are available on a termly basis to meet the needs of staff working in registered and unregistered childcare settings throughout the County.

- 13.2 As part of the autumn 2021 Carmarthenshire County Council survey with early years childcare and out of school childcare settings, representatives were invited to feedback how many staff were currently employed?

The average number of full-time currently employed by early years childcare settings was 4.

The average number of full-time currently employed by out of school childcare settings was 0.5.

The average number of part-time currently employed by early years childcare settings was 3.5.

The average number of part-time currently employed by out of school childcare settings was 6.

- 13.3 The survey with setting-based childcare providers requested feedback on how COVID-19 had affected the recruitment and retention of staff/professionals including (as would be expected) with regard to their own setting.

12% of all early years childcare and out of school childcare providers outlined that they had seen a number of their staff decide to leave their setting in the past 12 months, as a direct result of COVID-19.

In total, across all relevant respondents, this totalled 76 members of staff/childcare professionals with two settings reporting that they had lost seven members of staff due to COVID-19.

Respondents feedback on the sectors that they had 'lost staff' too, and in order of frequency these were:

- Schools/education sector – stated by 4 settings
- NHS/nursing – stated by 4 settings
- A supermarket – stated by 3 settings
- Hospitality sector – stated by 3 settings

- 13.4 Respondents to the autumn 2021 survey, from the early years childcare sector were invited to state whether they were happy that their setting has a requisite number of qualified Level 5 staff?

44% of early years childcare settings/providers stated: Yes and 56% stated No. Indeed 20% of such childcare providers stated that they were having problems recruiting such staff (particularly in the Carmarthen region).

13.5 The autumn 2021 survey with early years childcare and out of school childcare settings/providers requested details about (any) staff training needs or gaps. 15% of responding early years childcare and out of school childcare settings stated that they did have needs and/or gaps with the five most frequent being (in order of frequency):

1. Training aligned to the Curriculum for Wales
2. ALN-themed training
3. Further Foundation Phase training
4. Further Safeguarding training
5. Further First Aid training

(Only) six responding registered childminders considered that they had a training need in autumn in 2021. 5 of these childminders were located in the Llanelli area. Two areas of training focus were repeated and these were:

- Training which focuses on the Curriculum for Wales
- Training aligned to CIW processes

13.6 62% of early years childcare providers and out of school childcare providers fed back as an outcome of the autumn 2021 CSA consultation survey that they had at least one staff member who held a play work qualification. 20% of childminders stated that they or an assistant held a play work qualification.

13.7 Table 33 summarises the number of childcare providers where at least one individual held a specific play work themed qualification in each of the three sectors.

Table 33 - Incidence of childcare settings or childminders holding playwork qualifications in autumn 2021

Playwork Qualification	Number of early years childcare settings stating that they had staff member(s) with a qualification	Number of out of school childcare settings stating that they had staff member(s) with a qualification	Number of registered childminders stating that they or an assistant had a qualification
Playwork level 2	13	2	5
Playwork level 3	42	19	3
Playwork level 4	1	0	1
Playwork diploma level 5	11	0	2
Playwork degree	2	0	0
Playwork Masters	0	1	0
Other qualification	5	0	0

Two repeated Other qualifications were:

- (Most frequently) transition to playwork qualification
- Advanced playwork qualification

Table 34 summarises the number of childcare providers where at least one individual was working towards specific play work themed qualification in each of the three sectors.

Table 34 - Incidence of childcare settings or childminders working towards playwork qualifications in autumn 2021

Playwork Qualification	Number of early years childcare settings stating that they had staff member(s) working towards as their highest relevant qualification	Number of out of school childcare settings stating that they had staff member(s) working towards as their highest relevant qualification	Number of registered childminders stating that they or an assistant were working towards
Playwork level 2	3	1	1
Playwork level 3	30	4	1
Playwork level 4	2	0	0
Playwork diploma level 5	9	0	0
Playwork degree	0	0	0
Playwork Masters	0	0	0
Other qualification	4	0	0

The one repeated Other qualification was: transition to playwork qualification.

All childcare providers were invited to outline the types of play-related training (both accredited or non-accredited) that the staff at their setting had attended in the last 3 years. Repeated types of play-themed training stated were:

- Forest School training – 14% of all responding providers
- Loose Parts – 5.5% of all responding providers
- Language and Play training
- Playing in the Elements
- Woodworking via Mudiad Meithrin
- Outdoor play via Mudiad Meithrin

13.8 The autumn 2021 survey with early years childcare and out of school childcare settings/providers sought to ascertain the approaches that were taken to train staff. 49% of early years childcare providers and out of school childcare settings/providers stated they currently used face-to-face in-situ training methods and courses. In comparison, 88% of early years childcare providers and out of school childcare providers stated they accessed virtual training methods and courses.

Those early years childcare providers who stated that they (still) accessed face-to-face in-situ training were invited to state whether this ever caused any issues/problems in terms of them meeting their setting ratios. 21% stated that it did (with the equivalent percentage in the out of school sector being 15%).

73% of early years childcare providers and out of school childcare settings/providers also stated that they had sourced an independent training provider during the past 3 years (since 2018) as an alternative to Carmarthenshire County Council or its FIS. The four repeated independent training providers were (in order of frequency):

- Training from HighScope
- Training with Mudiad Meithrin
- CEL Training (First Aid)
- National Day Nurseries Association (NDNA) Training

13.9 Also on the theme of training, the June 2021 SASS Self Assessment of Service Statement responses highlighted how:

46.5% of (all type of) childcare providers stated that they had offered/organised less training for their staff as a result of COVID-19 (of these respondents, three stated that this was also affected by a lack of staff cover)

53.5% of childcare providers stated that they had offered/organised more training for their staff as a result of COVID-19.

Plus the Self Assessment of Service Statement invited childcare providers to respond to the following question: Do you currently have access to the training that you need? 5% of responding childcare providers stated: Yes.

Finally, as part of the SASS Self Assessment of Service Statement process, childcare providers were asked: Have you been able to access specific Infection Prevention Control (IPC) training? 56% of childcare providers stating yes and 44% stating no.

13.10 The autumn 2021 Carmarthenshire County Council survey with early years childcare and out of school childcare settings ascertained the number of childcare career apprentices that were currently being employed throughout the locality.

23% of responding early years childcare providers/settings and out of school childcare providers/settings stated that they did employ at least one apprentice at their setting and the average number of apprentices that were employed across all relevant provisions was 1.5.

3.5% responding early years childcare providers and out of school childcare providers stated that they currently did not employ any childcare apprentices but were looking to recruit to such role(s) in the near future and; 73.5% of responding early years childcare providers and out of school childcare providers stated that they had no immediate plans to recruit any apprentices.

14. OUTCOMES OF CONSULTATION WITH STAKEHOLDERS

14.1 Whilst undertaking this fifth Assessment the Local Authority consulted extensively with the groups in line with the requirements of The Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016:

The Welsh Government Childcare Sufficiency Assessment Guidance 2016 directed that Local Authorities should consult with local stakeholders and partner organisations to attain their perspective on priorities aligned to securing a sufficiency of childcare provision in their area. These stakeholders should include national umbrella organisations that make a key contribution to assisting the local authority, i.e. Carmarthenshire County Council.

Therefore Section 14. of the 2022 Carmarthenshire Childcare Sufficiency Assessment commences by outlining feedback that was received through a series of virtual e-interviews with key stakeholders, partners and professionals during late 2021 and early 2022, including representatives of Mudiad Meithrin; Early Years Wales; Clybiau Plant Cymru Kid's Clubs; National Day Nurseries Association (NDNA Cymru) and PACEY Cymru, and:

- Carmarthenshire County Council Employability representatives
- Carmarthenshire County Council Children and Disabilities Team
- Carmarthenshire County Council Youth Support Services
- Mid and West Wales Safeguarding Board
- Carmarthenshire County Council Family Information Service
- Representatives of schools and the education sector
- Carmarthenshire Jobcentre Plus
- Representatives of Carmarthenshire's health sector

Perceived strengths: childcare in the Carmarthenshire locality

- 14.2 A number of stakeholders, partners and professionals who were consulted for the 2022 Carmarthenshire Childcare Sufficiency Assessment expressed how they perceived the county's Flying Start programme to be a key strength: including from the perspective of its childcare element and the courses that were offered to (and were "accessible to") families. One relevant type of feedback was how:

"Creche provision is a key part of what we offer parents who attend our courses, this is often what enables them to be able to attend. Without this it is a barrier to parents meeting other parents, sharing experiences, peer support and advice, as well as the support from facilitators and the delivery of course content".

Essentially, this reiterated how in order to maintain the perceived strengths that the Flying Start (childcare element) brings to the county, the creche provision was fundamental.

- 14.3 The theme of Welsh-medium childcare was highlighted by four interviewees, and the LA early years team was identified as having comprehensive resources towards supporting and enabling parents and families who wish to access this. One interviewee described how in their experience:

"There is lots of high-quality day nurseries in the rural areas that give Welsh provision and prepare children to be bilingual. They are naturally Welsh. These Welsh nurseries then feed into the Welsh schools. A lot of villages now have their own Welsh-medium provision".

- 14.4 Two interviewees highlighted their perception that the childcare and early years sector in Carmarthenshire had demonstrated resilience in terms of how it had maintained its sustainability during the COVID-19 pandemic. One interviewee expressed their perception that:

"Settings kept up to date with fast moving changes in regulations and were all very committed to offering the best service possible to their children, families and staff. Additionally, our settings took the opportunity to access training through digital mediums such as Zoom and Teams... in my opinion high standards were maintained in difficult times..."

It was observed though, that three interviewees highlighted their opinion that the early years childcare sector in the county had displayed a greater degree of such resilience in comparison to the registered childminding sector and the out of school childcare sector, with childminders having to care for their own family and/or having to self shield and out of school clubs being unable to operate during periods of lockdown and onsite school closures.

Perceived areas for improvement: childcare in the Carmarthenshire locality

- 14.5 Two stakeholders/partners believed that a priority for the locality was to take a strategic overview of how childcare provision could ensure that an increased number of parents/carers could return to a workplace without childcare being a barrier to them doing so. One such partner suggested that this would be achieved once networking between professionals, including those involved with programmes such as the PaCE project and providers improved.

Other stakeholders also discussed the theme of employability and how suitable childcare should be a means with which to support this. Feedback on the subject in relation to (formal) childcare included:

- There could be more effective pathways from schools to colleges to childcare as a career
- Nurseries need more support to find staff and train new staff and to (be encouraged to) perceive this as investment
- Rural economic development projects should also contribute to strengthening the wider Carmarthenshire childcare infrastructure to allow (more local) parents to return to work and contribute to the economy

- 14.6 Returning to the theme of Welsh medium childcare provision, two interviewees outlined how, in their opinion, there was a need to strengthen the informal (childcare) drop-in type mother and baby groups. Specific feedback on Welsh medium provision also included beliefs that:

- There could ideally be more Welsh-language childcare provision in Llanelli
- There could (again) ideally be more Flying Start coverage in Welsh-speaking areas of the county
- Some disadvantaged families are not encouraged to choose Welsh childcare in order to gain access to Welsh-medium education.
- There could ideally be a policy statement that lists criteria for what constitutes 'bilingual' provision

- 14.7 Three interviewees outlined feedback that was aligned to the theme of rurality and sustainability with them suggesting that inconsistent internet access in such areas had caused relevant childcare providers to: (a) be at a disadvantage when it came to a knowledge of grants and access to support and: (b) experience more frequent difficulties with re-establishing their provision, post the COVID-19 pandemic.

- 14.8 Indeed, four interviewees highlighted the issue of how out of school childcare provision had (in their experience) "tended" to be slower in terms of recovering and reopening post the end of the (most) pronounced period of the pandemic, which was generally perceived to be spring 2020 to autumn 2021. For example, one interviewee highlighted how *"clubs I worked with introduced staggered opening and closing times... and this is a situation*

which still [in December 2021] remains as an issue for some local families". Two of these relevant interviewees also believed that recruitment and retention challenges intensified the theme of accessibility to out of school childcare being affected, with one interviewee believing that *"out of school childcare workers continue to feel undervalued and COVID-19 acted as a trigger for some leaving the sector"* and the other interviewee feeling that *"if the out of school sector crumbles a lot of people will not be able to work..."*.

14.9 Four interviewees picked up further on the themes of recruitment and retention with associated challenges outlined to include:

- Difficulties in recruiting professionals with Welsh language skills, which for (parental choice in) the Carmarthenshire locality is considered to be naturally, important
- Well qualified staff leaving for better paid jobs
- Well qualified staff leaving for *"less stressful"* jobs
- Staff feeling *"burnt out"*
- Students not being able in some cases, to complete the practical elements of their qualifications

However, it was noted that the theme of recruitment repeatedly/particularly featured when an interviewee was providing feedback about the out of school childcare sector, with one out of school sector professional stating that their organisation had been *"really struggling to get to staff to work in clubs"*.

One relevant interviewee summarised the views of the others when stating *"the local authority needs to prioritise how it can help with recruitment and especially retention"*.

14.10 Finally, on the theme of perceived areas of further work/perceived change(s): two stakeholders highlighted their opinion, that training including around the theme of ALN could be *"more joined-up"*. These two stakeholders both described how in their opinion there could be more collaborative working between the local authority's early years team and health visitor professionals operating in the county, which had a focus on collaborative training initiatives aligned to the theme of ALN.

Perceived action/strategic priorities: childcare in the Carmarthenshire locality

14.11 Three interviewees outlined how, in their direct experience, the phrase 'postcode lottery' was a particular issue relevant to the Flying Start programme across Carmarthenshire. Certain interviewees/professionals stated how this was a source of frustration to them as well as the families who were unable to access the programme, especially for reasons fed back which included:

"(to the best of my knowledge) some middle-class parents that do live in Flying Start areas actually turn down support because of a sense of stigma".

- 14.12 Three interviewees provided feedback as to how in their (statistically evidential and anecdotal experience) the incidence of ALN children was increasing and had been exacerbated by children not being able to continue a “normal” early years development progression, as an outcome of the COVID-19 pandemic. One relevant interviewee, who through their profession was in contact with families day-to-day outlined how, in their experience:

“There has been a huge COVID-19 effect on children’s early years development... The number of ALN children seems to be increasing... and with regard to ‘global delay’ the numbers [of children] coming through are huge”.

- 14.13 It can be noted that two of the interviewees also highlighted their belief that the Childcare Offer “in its current format” did not necessarily help carers of children with ALN because of the challenges and difficulties that they would invariably experience with finding employment and an inherent ‘vicious circle’ therefore existed possibly for such parents.

The theme of Welsh-medium provision continued to be highlighted when strategic priorities were discussed. One well-placed to this theme interviewee outlined how ideally more bilingual good practice should be shared, including via “video resources/content being created so that nurseries can see how to immerse children in Welsh in real-life locations in the county”.

- 14.14 Two interviewees outlined their belief that there could be a greater focus in 2022 and 2023 on an accessibility to training courses that focused on how leaders at childcare groups/settings could best support and be watchful of their staff’s health and wellbeing, including from the perspective of retention.

CONSULTATION WITH CHILDREN AND YOUNG PEOPLE

- 14.15 In early 2022, Carmarthenshire County Council undertook both quantitative and qualitative consultation with children and young people that resident across the county for the Childcare Sufficiency Assessment and for an associated project: the production of a Play Sufficiency Assessment, which similarly to the CSA, all Welsh local authorities are directed to produce. The quantitative consultation incorporated specific questions aligned to the theme of out of school childcare and was called the Big Play Survey for Primary School pupils.

297 primary cohort pupils responded and gave valuable feedback on the theme of out of school childcare:

Activities that children and young people like to undertake when they are not at school

- 14.16 264 young people responded to this question. A range of out of school sporting activities were highlighted: ranging from rugby to triathlon to football to motor cross. Indeed, 75% of young people/pupils who answered this question referenced a type of local sports club.

The second most frequent out of school activities aligned to the theme of arts and culture with 16% of such respondents highlighting pursuits such as dance, piano, drama and art club. The same percentage (16%) referenced informal outside recreation activities including: going to the park, walking the dog and climbing trees (16%).

8% of children referenced out of school activities that involved IT e.g. (using) PS4, iPad, Nintendo switch and just being online.

Usage of formal out of school childcare

- 14.17 Table 35 below outlines the frequency with which primary cohort children and young people said that they accessed a particular type of out of school childcare.

Table 35 - Frequency of usage of types of out of school childcare

Type of out of school childcare	Percentage using
After School Club	26%
Breakfast Club	49%
Holiday Club	15%
Childminder	2%
None of the above	43%

Of those children and young people who stated after school club, breakfast club or holiday club: 71% stated that the club was located at the school they attended and 29% stated that it was located at another venue, outside of their school.

Types of activities young people would like to attend - that are not around at the moment

- 14.18 152 children/young people responded to this theme. 36% stated that they would like to (in the future) attend some form of sports club, with a football club being the most popular type and others but ranging from American Football to snowboarding (club). 22% wanted a club or activity related to arts and culture for example art club, dance classes and piano lessons. 9% of young people requested a litter collection club and 4% suggested a club where they could share their problems.

21% stated there was nothing/no type of club that they wanted.

Further qualitative feedback

14.19 During some e-sessions and face-to-face focus group consultation sessions with children and young people a common theme that was outlined was how younger primary cohort pupils perceived going to an after school club and/or a breakfast club as a fun thing to do.

Amongst older (Year 5 and Year 6 pupils) there has been some confusion about clubs closing due to COVID and when they will be re-opening.

In terms of a further discussion on what they would like to see more of, this tended to be outlined as more interesting play equipment in parks for example zip wires and skate ramps. Some children did reference specific type of clubs they wanted to go to with football (again) being a frequent type.

A number of young people, particularly a number who were evidently resident in rural localities, highlighted their understanding of the cost of play and used terminology such as the cost of living crisis and increasing energy bills.

15. GAP ANALYSIS & AREAS FOR IMPROVEMENT

- 15.1 This full Childcare Sufficiency Assessment Report uses a range of data collected as part of the Assessment process to identify gaps in the childcare market experienced by different categories of parents/carers in Carmarthenshire.
- 15.2 The Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016 require all Local Authorities to consider: the **accessibility of childcare provision**.
- 15.3 This Gaps Analysis section commences with a summary of the population of 0-14 year olds within each of the county of Carmarthenshire's 112 LSOAs – which are summarised overleaf on page 108.

Subsequent to the population summary of 0-14 year olds resident in each of the 112 LSOAs is a Table summarising the number of registered childcare places that were accessing in each LSOA in June 2021.

	LSOA Name
1	Abergwili
2	Ammanford 1
3	Ammanford 2
4	Betws
5	Bigyn 1
6	Bigyn 2
7	Bigyn 3
8	Bigyn 4
9	Burry Port 1
10	Burry Port 2
11	Burry Port 3
12	Bynea 1
13	Bynea 2
14	Carmarthen Town North 1
15	Carmarthen Town North 2
16	Carmarthen Town North 3
17	Carmarthen Town North 4
18	Carmarthen Town South 1
19	Carmarthen Town South 2
20	Carmarthen Town West 1
21	Carmarthen Town West 2
22	Carmarthen Town West 3
23	Cenarth
24	Cilycwm
25	Cynwyl Elfed 1
26	Cynwyl Elfed 2
27	Cynwyl Gaeo
28	Dafen 1

	LSOA Name
29	Dafen 2
30	Eli 1
31	Eli 2
32	Felinfoel
33	Garnant
34	Glanamman1
35	Glanamman 2
36	Glanymor 1
37	Glanymor 2
38	Glanymor 3
39	Glyn
40	Gorslas 1
41	Gorslas 2
42	Hendy 1
43	Hendy 2
44	Hengoed 1
45	Hengoed 2
46	Hengoed 3
47	Kidwelly 1
48	Kidwelly 2
49	Laugharne Township 1
50	Laugharne Township 2
51	Llanboidy
52	Llanddarog
53	Llandeilo 1
54	Llandeilo 2
55	Llandovery 1
56	Llandovery 2

	LSOA Name
57	Llandybie 1
58	Llandybie 2
59	Llanegwad 1
60	Llanegwad 2
61	Llanfihangel Aberbythych
62	Llanfihangel-ar-Arth 1
63	Llanfihangel-ar-Arth 2
64	Llangadog
65	Llangeler 1
66	Llangeler 2
67	Llangennech 1
68	Llangennech 2
69	Llangennech 3
70	Llangunnor 1
71	Llangunnor 2
72	Llangyndeyrn 1
73	Llangyndeyrn 2
74	Llannon 1
75	Llannon 2
76	Llannon 3
77	Llansteffan
78	Llanybydder 1
79	Llanybydder 2
80	Lliedi 1
81	Lliedi 2
82	Lliedi 3
83	Llwynhendy 1

	LSOA Name
84	Llwynhendy 2
85	Llwynhendy 3
86	Manordeilo and Salem
87	Pembrey 1
88	Pembrey 2
89	Penygroes 1
90	Penygroes 2
91	Pontamman 1
92	Pontamman 2
93	Pontyberem 1
94	Pontyberem 2
95	Quarter Bach 1
96	Quarter Bach 2
97	St. Clears 1
98	St. Clears 2
99	St. Ishmael 1
100	St. Ishmael 2
101	Saron 1
102	Saron 2
103	Swiss Valley 1
104	Swiss Valley 2
105	Trelech
106	Trimsaran 1
107	Trimsaran 2
108	Tycroes
109	Tyisha 1
110	Tyisha 2
111	Tyisha 3
112	Whitland

Table 36 - Child Population by age group, 2020 in the 112 LSOAs

LSOA Code	LSOA Name	0-2 years	3-4 years	5-7 years	8-10 years	11-14 years	0-14 years
Community Area 1							
W01000637	Carmarthen Town North 1	55	48	63	54	61	281
W01000638	Carmarthen Town North 2	50	45	50	53	91	289
W01000639	Carmarthen Town North 3	43	38	39	39	62	221
W01000640	Carmarthen Town North 4	41	26	38	41	51	197
W01000641	Carmarthen Town South 1	73	43	64	73	50	303
W01000642	Carmarthen Town South 2	57	33	43	50	44	227
W01000646	Cenarth	57	34	49	60	120	320
W01000672	Laugharne Township 1	24	31	47	67	73	242
W01000673	Laugharne Township 2	19	18	41	36	44	158
W01000674	Llanboidy	60	37	58	79	100	334
W01000688	Llangeler 1	51	47	53	70	96	317
W01000689	Llangeler 2	31	16	30	39	71	187
W01000693	Llangunnor 1	17	20	43	45	59	184
W01000694	Llangunnor 2	39	32	56	61	55	243
W01000700	Llansteffan	42	35	58	52	75	262
W01000720	St Clears 1	43	47	84	70	84	328
W01000721	St Clears 2	49	41	56	67	58	271
W01000728	Trelech	50	27	47	45	62	231
W01000735	Whitland	56	44	73	103	115	391
Area 1		857	662	992	1,104	1,371	4,986
Community Area 2							
W01000624	Abergwili	50	46	68	73	105	342
W01000643	Carmarthen Town West 1	59	49	82	87	108	385
W01000644	Carmarthen Town West 2	65	46	63	73	90	337
W01000645	Carmarthen Town West 3	67	52	94	106	112	431
W01000647	Cilycwm	34	24	37	35	55	185
W01000648	Cynwyl Elfed 1	37	29	41	59	51	217
W01000649	Cynwyl Elfed 2	22	19	39	48	57	185
W01000650	Cynwyl Gaeo	49	43	40	50	59	241
W01000676	Llandeilo 1	27	31	47	44	67	216
W01000677	Llandeilo 2	29	23	35	73	79	239
W01000678	Llandovery 1	30	27	47	27	35	166
W01000679	Llandovery 2	29	21	30	33	54	167
W01000682	Llanegwad 1	36	24	44	48	60	212
W01000683	Llanegwad 2	9	11	21	39	61	141
W01000684	Llanfihangel Aberbythych	29	26	39	51	107	252
W01000685	Llanfihangel-ar-Arth 1	58	45	52	60	72	287
W01000686	Llanfihangel-ar-Arth 2	39	27	41	55	62	224
W01000687	Llangadog	38	30	37	51	88	244
W01000701	Llanybydder 1	48	33	36	56	88	261
W01000702	Llanybydder 2	32	31	26	55	60	204
W01000709	Manordeilo and Salem	43	38	46	62	88	277
Area 2		830	675	965	1,185	1,558	5,213
Community Area 3							

W01000625	Ammanford 1	31	26	41	42	73	213
W01000626	Ammanford 2	50	32	45	51	87	265
W01000627	Betws	80	60	93	121	113	467
W01000656	Garnant	72	50	67	97	128	414
W01000657	Glanamman 1	29	14	34	32	54	163
W01000658	Glanamman 2	44	32	51	61	62	250
W01000665	Hendy 1	49	38	56	55	65	263
W01000666	Hendy 2	65	49	59	73	94	340
W01000680	Llandybie 1	47	35	74	95	115	366
W01000681	Llandybie 2	54	35	67	92	106	354
W01000714	Pontamman 1	43	36	43	49	55	226
W01000715	Pontamman 2	22	21	32	39	43	157
W01000718	Quarter Bach 1	47	30	52	58	56	243
W01000719	Quarter Bach 2	46	27	68	53	69	263
W01000724	Saron 1	62	39	67	77	97	342
W01000725	Saron 2	40	49	55	67	74	285
W01000731	Tycroes	87	58	89	74	105	413
Area 3		868	631	993	1,136	1,396	5,024
Community Area 4							
W01000632	Burry Port 1	30	18	40	29	70	187
W01000633	Burry Port 2	18	22	38	47	68	193
W01000634	Burry Port 3	24	10	30	24	56	144
W01000662	Glyn	56	42	60	66	122	346
W01000663	Gorslas 1	85	47	61	69	114	376
W01000664	Gorslas 2	96	73	97	89	95	450
W01000670	Kidwelly 1	35	34	61	71	101	302
W01000671	Kidwelly 2	48	36	64	71	96	315
W01000675	Llanddarog	46	35	59	57	90	287
W01000695	Llangyndeyrn 1	69	48	59	84	75	335
W01000696	Llangynderyn 2	39	29	46	55	76	245
W01000710	Pembrey 1	32	27	38	74	115	286
W01000711	Pembrey 2	38	49	64	64	84	299
W01000716	Pontyberem 1	38	31	30	41	55	195
W01000717	Pontyberem 2	46	34	52	60	79	271
W01000722	St. Ishmael 1	22	16	24	31	52	145
W01000723	St. Ishmael 2	22	8	35	35	59	159
W01000729	Trimsaran 1	34	37	50	61	63	245
W01000730	Trimsaran 2	40	24	47	48	38	197
Area 4		818	620	955	1,076	1,508	4,977
Community Area 5							
W01000635	Bynea 1	66	52	93	85	146	442
W01000636	Bynea 2	91	53	106	107	95	452
W01000651	Dafen 1	40	24	39	34	64	201
W01000652	Dafen 2	67	53	81	92	134	427
W01000655	Felinfoel	77	52	77	91	136	433
W01000690	Llangennech 1	60	33	60	69	72	294
W01000691	Llangennech 2	61	47	65	81	106	360

LSOA Code	LSOA Name	0-2 years	3-4 years	5-7 years	8-10 years	11-14 years	0-14 years
W01000692	Llangennech 3	39	25	58	71	85	278
W01000697	Llannon 1	60	41	70	62	83	316
W01000698	Llannon 2	57	62	79	78	96	372
W01000699	Llannon 3	27	20	33	51	87	218
W01000706	Llwynhendy 1	57	34	73	70	71	305
W01000707	Llwynhendy 2	80	54	82	67	80	363
W01000708	Llwynhendy 3	42	40	59	70	95	306
W01000712	Penygroes 1	58	40	44	61	69	272
W01000713	Penygroes 2	31	24	41	31	63	190
W01000726	Swiss Valley 1	29	21	40	43	66	199
W01000727	Swiss Valley 2	13	11	21	19	23	87
Area 5		955	686	1,121	1,182	1,571	5,515
Community Area 6							
W01000628	Bigyn 1	41	22	58	48	53	222
W01000629	Bigyn 2	58	41	55	58	66	278
W01000630	Bigyn 3	41	26	61	71	93	292
W01000631	Bigyn 4	87	68	85	81	118	439
W01000653	Elli 1	33	26	33	42	56	190
W01000654	Elli 2	41	33	54	51	65	244
W01000659	Glanymor 1	84	49	73	89	99	394
W01000660	Glanymor 2	45	39	47	51	67	249
W01001924	Glanymor 3	56	52	79	71	77	335
W01001923	Glanymor 4	72	37	45	44	56	254
W01000667	Hengoed 1	72	49	82	69	75	347
W01001925	Hengoed 2	45	35	64	91	111	346
W01000703	Lliedi 1	56	44	67	73	99	339
W01000704	Lliedi 2	27	25	53	62	77	244
W01000705	Lliedi 3	66	55	96	103	132	452
W01000732	Tyisha 1	44	30	58	44	53	229
W01000733	Tyisha 2	36	27	46	54	72	235
W01000734	Tyisha 3	55	40	39	48	67	249
Area 6		959	698	1,095	1,150	1,436	5,338
COUNTY		5,287	3,972	6,121	6,833	8,840	31,053

Table 37 - Day care places for 0-14 year olds in Carmarthenshire in June 2021 in each LSOA

LSOA Code	LSOA Name	Total registered Places	Childminder Places	Full Day care Places	Sessional Day care Places	Out of School Childcare Places
Community Area 1						
2022 W01000637	Carmarthen Town North 1	10	0	0	10	0
2022 W01000638	Carmarthen Town North 2	0	0	0	0	0
2022 W01000639	Carmarthen Town North 3	80	0	0	0	80
2022 W01000640	Carmarthen Town North 4	58	39	19	0	0
2022 W01000641	Carmarthen Town South 1	287	36	69	34	80
2022 W01000642	Carmarthen Town South 2	75	0	0	19	56
2022 W01000646	Cenarth	105	16	30	19	40
2022 W01000672	Laugharne Township 1	52	23	10	0	19
2022 W01000673	Laugharne Township 2	19	0	0	19	0
2022 W01000674	Llanboidy	26	10	0	16	0
2022 W01000688	Llangeler 1	32	18	0	14	0
2022 W01000689	Llangeler 2	29	11	0	18	0
2022 W01000693	Llangunnor 1	8	8	0	0	0
2022 W01000694	Llangunnor 2	168	16	49	18	85
2022 W01000700	Llansteffan	0	0	0	0	0
2022 W01000720	St Clears 1	73	20	35	18	0
2022 W01000721	St Clears 2	96	0	0	24	72
2022 W01000728	Trelech	16	0	0	16	0
2022 W01000735	Whitland	69	10	16	19	24
Community Area 2						
2022 W01000624	Abergwili	80	21	30	29	0
2022 W01000643	Carmarthen Town West 1	39	0	23	0	16
2022 W01000644	Carmarthen Town West 2	66	10	0	0	56
2022 W01000645	Carmarthen Town West 3	0	0	0	0	0
2022 W01000647	Cilycwm	0	0	0	0	0
2022 W01000648	Cynwyl Elfed 1	0	0	0	0	0
2022 W01000649	Cynwyl Elfed 2	97	12	36	24	25
2022 W01000650	Cynwyl Gaeo	0	0	0	0	0
2022 W01000676	Llandeilo 1	32	0	0	0	32
2022 W01000677	Llandeilo 2	95	0	0	23	72
2022 W01000678	Llandovery 1	40	0	0	40	0
2022 W01000679	Llandovery 2	122	0	96	26	0
2022 W01000682	Llanegwad 1	71	26	0	0	45
2022 W01000683	Llanegwad 2	26	0	0	16	10
2022 W01000684	Llanfihangel Aberbythych	30	10	0	20	0
2022 W01000685	Llanfihangel-ar-Arth 1	25	8	0	17	0
2022 W01000686	Llanfihangel-ar-Arth 2	38	29	0	9	0
2022 W01000687	Llangadog	17	0	0	17	0
2022 W01000701	Llanybydder 1	61	0	0	31	30
2022 W01000702	Llanybydder 2	10	10	0	0	0
2022 W01000709	Manordeilo and Salem	46	0	36	0	10

LSOA Code	LSOA Name	Total registered Places	Childminder Places	Full Day care Places	Sessional Day care Places	Out of School Childcare Places
Community Area 3						
2022 W01000625	Ammanford 1	118	0	70	16	32
2022 W01000626	Ammanford 2	99	0	64	0	35
2022 W01000627	Betws	80	4	0	36	40
2022 W01000656	Garnant	48	0	0	24	24
2022 W01000657	Glanamman 1	6	6	0	0	0
2022 W01000658	Glanamman 2	16	16	0	0	0
2022 W01000665	Hendy 1	0	0	0	0	0
2022 W01000666	Hendy 2	41	25	0	16	0
2022 W01000680	Llandybie 1	0	0	0	0	0
2022 W01000681	Llandybie 2	58	26	0	0	32
2022 W01000714	Pontamman 1	6	6	0	0	0
2022 W01000715	Pontamman 2	0	0	0	0	0
2022 W01000718	Quarter Bach 1	51	10	0	17	24
2022 W01000719	Quarter Bach 2	0	0	0	0	0
2022 W01000724	Saron 1	46	0	0	30	16
2022 W01000725	Saron 2	0	0	0	0	0
2022 W01000731	Tycroes	55	5	0	10	40
Community Area 4						
2022 W01000632	Burry Port 1	39	0	0	39	0
2022 W01000633	Burry Port 2	58	0	58	0	0
2022 W01000634	Burry Port 3	24	24	0	0	0
2022 W01000662	Glyn	64	24	0	16	24
2022 W01000663	Gorslas 1	87	25	22	40	0
2022 W01000664	Gorslas 2	70	12	39	19	0
2022 W01000670	Kidwelly 1	56	0	32	0	24
2022 W01000671	Kidwelly 2	40	6	0	18	16
2022 W01000675	Llanddarog	30	0	30	0	0
2022 W01000695	Llangyndeyrn 1	36	6	0	30	0
2022 W01000696	Llangynderyn 2	48	6	16	26	0
2022 W01000710	Pembrey 1	20	10	0	10	0
2022 W01000711	Pembrey 2	34	0	24	10	0
2022 W01000716	Pontyberem 1	10	10	0	0	0
2022 W01000717	Pontyberem 2	6	6	0	0	0
2022 W01000722	St.Ishmael 1	117	6	92	19	0
2022 W01000723	St.Ishmael 2	6	6	0	0	0
2022 W01000729	Trimsaran 1	29	10	0	19	0
2022 W01000730	Trimsaran 2	0	0	0	0	0
Community Area 5						
2022 W010006	Bynea 1	39	23	0	16	0
2022 W010006	Bynea 2	32	0	32	0	0
2022 W010006	Dafen 1	74	0	60	0	14
2022 W010006	Dafen 2	41	7	0	34	0

LSOA Code	LSOA Name	Total registered Places	Childminder Places	Full Day care Places	Sessional Day care Places	Out of School Childcare Places
2022 W010006	Felinfoel	3	3	0	0	0
2022 W010006	Llangennech 1	36	5	31	0	0
2022 W010006	Llangennech 2	10	10	0	0	0
2022 W010006	Llangennech 3	51	0	0	19	32
2022 W010006	Llannon 1	55	15	0	0	40
2022 W010006	Llannon 2	16	16	0	0	0
2022 W010006	Llannon 3	69	0	0	45	24
2022 W010006	Llwynhendy 1	23	23	0	0	0
2022 W010006	Llwynhendy 2	82	18	0	24	40
2022 W010006	Llwynhendy 3	9	9	0	0	0
2022 W010006	Penygroes 1	10	10	0	0	0
2022 W010006	Penygroes 2	85	0	28	33	24
2022 W010006	Swiss Valley 1	40	0	0	0	40
2022 W010006	Swiss Valley 2	10	10	0	0	0
Community Area 6						
2022 W01000628	Bigyn 1	22	22	0	0	0
2022 W01000629	Bigyn 2	6	6	0	0	0
2022 W01000630	Bigyn 3	0	0	0	0	0
2022 W01000631	Bigyn 4	0	0	0	0	0
2022 W01000653	Elli 1	52	16	36	0	0
2022 W01000654	Elli 2	105	8	97	0	0
2022 W01000659	Glanymor 1	14	14	0	0	0
2022 W01000660	Glanymor 2	79	10	29	20	20
2022 W01001924	Glanymor 3	20	0	0	20	0
2022 W01001923	Glanymor 4	0	0	0	0	0
2022 W01000667	Hengoed 1	44	0	26	18	0
2022 W01001925	Hengoed 2	0	0	0	0	0
2022 W01000703	Lliedi 1	44	0	0	22	22
2022 W01000704	Lliedi 2	24	0	0	0	24
2022 W01000705	Lliedi 3	64	0	40	24	0
2022 W01000732	Tyisha 1	32	0	32	0	0
2022 W01000733	Tyisha 2	10	10	0	0	0
2022 W01000734	Tyisha 3	143	0	123	20	0
COUNTY		4,772	787	1,462	1,186	1,337

- 15.4 The tables below summarises the **number of registered childcare providers and places** available within each Community Area (1-6).

Table 38 - Community Area 1

	Childminders	Full Day care	Sessional Day care	Out of School Childcare
Total Providers	22	10	15	12
Total Places	207	296	244	456

Table 39 - Community Area 2

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

Table 40 - Community Area 3

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

Table 41 - Community Area 4

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

Table 42 - Community Area 5

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

Table 43 - Community Area 6

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

- 15.5 The Tables above and various data collected as part of this full report have enables the Local Authority to identify the following:

Community Area **1 has the highest number of registered childcare places.**

Community Areas **3 has the lowest number of registered childcare places.**

- 15.6 The Tables above indicates that:

Childminders

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

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

Full Day Care

Community Area 6 accounted in June 2021 for the highest number of full day care places.

Community Area 3 accounted for the lowest number of full day care providers places.

Sessional Care

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

Community Area 6 accounted for the lowest number of sessional day care places.

Out of School Care

Community Area 1 accounted in June 2021 for the highest number of out of school childcare places.

Community Area 4 accounted for the lowest number of out of school childcare places.

Analysis of supply of childcare and areas of improvement

- 15.7 The tables above were used in the analysis of supply of childcare for 0 to 4 year olds and 5 to 14 year olds. The tables were completed using information of registered childcare settings provided by CIW and Carmarthenshire FIS (as of June 2021) and the child population by age group (based on mid-year 2020 estimates).

The results were broken down by LSOA and split into Community Areas in order to look at current gaps in provision by setting type and number of registered places by location.

Accessibility rates in June 2021

- 15.8 Table 44 below shows the accessibility rates to full day care places for children aged 0-4 years that are resident in each of the 6 Community Areas.

Table 44 - Accessibility rates in June 2021 – Full Day care in Carmarthenshire

Area	Number of resident 0-4 year olds	Number of Full Day care Places	Theoretical number of children per 100 who could access a Full Day Care Places
Area 1	1,519	207	14/100
Area 2	1,505	185	13/100
Area 3	1,499	134	10/100
Area 4	1,438	313	22/100
Area 5	1,641	151	9/100
Area 6	1,657	383	23/100
County	9,259	1,462	16/100

Table 44 indicates that Community Area 6 has the highest coverage/accessibility for 0-4 year olds in terms of full day care provision. This is encouraging, aligned to the fact that it has the highest number of resident 0-4 year olds. Area 3 which accounts for the Ammanford locality currently has the lowest coverage of full day care provision.

- 15.9 Table 45 below shows the accessibility rates to sessional day care places for children aged 3-4 years that are resident in each of the 6 Community Areas.

Table 45 - Accessibility rates in June 2021 – Sessional Day care in Carmarthenshire

Area	Number of resident 3-4 year olds	Number of Sessional Day care Places	Theoretical number of children per 100 who could access a Sessional Day care Place
Area 1	662	244	34/100
Area 2	675	252	37/100
Area 3	631	149	24/100
Area 4	620	246	40/100
Area 5	686	171	25/100
Area 6	696	124	18/100
County	3,970	1,186	30/100

Childcare planners in Carmarthenshire are aware of the fact that the locality with the highest resident population of 3-4 year olds, Community Area 6 has the (relatively) lowest accessibility rate to sessional day care provision. Community Area 2, which incorporates the western vicinity of Carmarthen has the highest number of actual places.

- 15.10 Table 46 below shows the accessibility rates to registered childminder places for children aged 0-14 years that are resident in each of the 6 Community Areas.

Table 46 - Accessibility rates in June 2021 – Registered Childminders in Carmarthenshire

Area	Number of resident 0-14 year olds	Number of Registered Childminders Places	Theoretical number of children per 100 who could access a Registered Childminder Place
Area 1	4,986	207	4/100
Area 2	5,213	126	2.5/100
Area 3	5,024	98	2/100
Area 4	4,977	151	3/100
Area 5	5,515	119	2/100
Area 6	5,338	86	1.5/100
County	31,053	787	2.5/100

Table 46 indicates that the highest coverage of registered childminder places in Carmarthen, where approximately 25% of the county's total childminders are located. Childcare planners at the local authority retain an awareness that the two Community Areas that have a relatively high number of 0-14 year olds combined, have in comparison a relatively low accessibility to childminder places. 7% of parents who responded to the October 2021 Welsh Government Parental Survey stated that they intended to access a childminder in the next two years, so this is a priority for the local authority, to work with partners to help regenerate the county's childminding sector.

- 15.11 Table 47 below shows the accessibility rates to out of school childcare places for children aged 5-14 years that are resident in each of the 6 Community Areas.

Table 47 - Accessibility rates in June 2021 – Out of School Childcare in Carmarthenshire

Area	Number of resident 5-14 year olds	Number of Registered Out of School Childcare Places	Theoretical number of children per 100 who could access an Out of School Childcare Place
Area 1	3,469	456	13/100
Area 2	3,708	296	8/100
Area 3	3,525	241	7/100
Area 4	3,539	64	2/100
Area 5	3,874	214	5/100
Area 6	3,687	66	2/100
County	21,802	1,337	6/100

Childcare planners with the local authority are aware that out of school childcare opportunities most frequently featured as the type(s) of formal childcare that parents who responded to the October 2021 Welsh Government parental survey most frequently denoted as support they would like to access, in the next 2 years. However, in practice it is 5-11 year olds who are most likely to access after school childcare. The figures have to be viewed within the context of the number of out of school childcare places which are accessible at non-registered school-based clubs in the county.

- 15.12 Table 48 below shows the accessibility rates to all registered childcare places for children aged 0-14 years that are resident in each of the 6 Community Areas.

Table 48 - Accessibility rates in June 2021 – All registered childcare in Carmarthenshire

Area	Number of resident 0-14 year olds	Number of All Registered Childcare Places	Theoretical number of children per 100 who could access a Registered Childcare Place
Area 1	4,986	1,134	23/100
Area 2	5,213	895	17/100
Area 3	5,024	624	12.5/100
Area 4	4,977	774	15.5/100
Area 5	5,515	685	12.5/100
Area 6	5,338	660	12.5/100
County	31,053	4,772	15.5/100

Table 48 indicates that approximately 1:6 of 0 -14 year olds that are resident in the county were, in June 2021, able to access a formal childcare place. This accessibility rate was higher for 0-4 year olds, which is encouraging given the Welsh government's plans to roll out universal provision for 2 year olds.

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

- The number of registered childcare providers and places accessible in the County have both increased since 2017. There has also been an increase in our resident number of 0-14 year olds since our last assessment.
- The Local Authority knows that the population of Carmarthenshire has been forecast to **increase** by 2.4% up to 2028 and this could result in approximately 220 more resident 0-4 year olds by 2027 and 520 more resident 5-14 year olds by 2027.
- Community Area 3 has the lowest number of registered childcare providers and in particular full day care. The Ammanford locality is set to account for buoyant new housing developments up to 2026, with 562 new dwellings set to be built. This is likely to increase demand for childcare in Community Area 3.

- Community Area 5 has a relatively high population of 0–4-year-olds, however a relatively low number of full day care places. This could cause sufficiency pressures when the universal offer for 2 year olds and extension of Childcare Offer for 3 and 4 year olds gains momentum. It is also a factor that 1,970 new housing developments are planned for the Llanelli locality up to 2026, which could, once again, cause additional pressure for formal registered childcare places.
- Community Area 6 also has a relatively high population of 0-4 year olds, however it has three LSOAs located within its boundary where there are no registered childcare places located: Bigyn 4; Glanymor 1 and; Hengoed 2. To an extent, this is offset by the Community Area having the highest incidence of full day care places – however, it has the lowest quantity of places with registered childminders and one of the lowest quantity of places with registered out of school childcare providers. It will need to be an area of sufficiency focus. It can also be noted that the Bigyn locality accounted for a relatively high birth rate, prior to the 2020 start of the COVID-19 pandemic and also features within the top 100 areas of relative deprivation in Wales. The Glanymor locality also features in the top 20% areas for childhood poverty for Wales.
- The numbers of registered childminders operating in the county has fallen since the 2017 Childcare Sufficiency Assessment. This could cause sufficiency pressures aligned to an evident increase in demand for flexible hours, families working shift and atypical hours and families looking for care for children with additional learning needs.

CONCLUSION

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

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

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

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

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

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

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

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

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

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

RECOMMENDATIONS

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

CHILDCARE DEMAND

Recommendation 1

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

Recommendation 2

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

Recommendation 3

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

CHILDCARE SUPPLY

Recommendation 4

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

Recommendation 5

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

Recommendation 6

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

Recommendation 7

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

Recommendation 8

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

Recommendation 9

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

Recommendation 10

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

Recommendation 11

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

AVAILABILITY/FLEXIBILITY

Recommendation 12

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

AFFORDABILITY

Recommendation 13

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

Recommendation 14

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

SUSTAINABILITY

Recommendation 15

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

Recommendation 16

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

INFORMATION

Recommendation 17

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

WORKFORCE DEVELOPMENT RECRUITMENT AND RETENTION AND CONTINUING PROFESSIONAL DEVELOPMENT

Recommendation 18

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

Recommendation 19

The Local Authority needs to continue to ensure that the local childcare workforce continue to have access to appropriate subsidised mandatory training courses to fulfil Care Inspectorate Wales requirements and further enhance continuing professional development opportunities.

Recommendation 20

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

Recommendation 21

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

ADDITIONAL LEARNING NEEDS

Recommendation 22

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

WELSH MEDIUM PROVISION

Recommendation 23

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