



**Analysis of the Supply of
Registered Childcare Places in
Wales
2006-2007**

September 2007

1. Introduction

- 1.1 This report provides the third annual update of registered childcare in Wales based on data provided by Care and Social Services Inspectorate for Wales (CSSIW).
- 1.2 Data refers only to childcare that is registered by CSSIW against the National Minimum Standards set by the Welsh Assembly Government.
- 1.3 Most of the information presented relates to childcare as defined within five categories by CSIW:
 - Childminding
 - Full Day Care
 - Sessional Day Care
 - Out of School Care
 - Crèches
- 1.4 Childcare supply data is taken from CSSIW registrations as of June 2007. Where data has been related to population, Office for National Statistics 2006 Mid-year Population Estimates for Wales (by selected age-groups) have been used to provide the most up-to-date assessment.
- 1.5 While the use of CSSIW statistics provides a consistent data set that is useful in observing trends and making comparisons between local authorities in Wales, it does not necessarily represent a true picture of the supply of childcare in Wales.
- 1.6 Excluded from the data is any unregistered provision that operates outside of regulation. This can include services for children over 8 years of age; services running for less than 2 ½ hours per day; and some childcare operating in and by schools. Furthermore, when considering out of school care in particular, the way in which registration covers the three elements of out of school care (before-school, after-school and holiday care) - but excludes care provided by daycare settings for school-aged children - makes any supply and demand analysis difficult.

2. Registered Childcare Places

2.1 Overall, the number of registered childcare places in Wales increased by 1.3% between 2006 and 2007. This represents an increase of 908 childcare places, compared with an increase of less than 200 (0.3%) between 2005 and 2006.

Figure 1: Volume of childcare places¹

	2006	2007	Difference 06-07
Childminders	11,628	12,026	3.4%
Full Daycare	18,074	19,548	8.2%
Sessional Daycare	17,291	17,164	-0.7%
Out of School Care	18,852	18,172	-3.6%
Creche	1,345	1,187	-11.7%
All Childcare	69,196	70,104	1.3%

- 2.2 The largest proportional increase in places was found in the full daycare sector with nearly 1,500 additional places being registered through 36 additional settings, representing an 8% increase in supply. The number of childminders continued to increase with nearly 100 additional childminders registered.
- 2.3 The volume of out of school care decreased by 680 places between 2006 and 2007², despite a net loss of only 4 settings.
- 2.4 The amount of Sessional Daycare decreased again in 2006-2007 (-1.7%), but the rate slowed from the -4% drop in places between 2005 and 2006. In total, there were 11 fewer sessional daycare settings registered in Wales in 2007 than in 2006. Since 2005, there has been a net loss of 44 settings – representing over 5% of the total.

Figure 2: Number of Settings

	2006	2007	Difference 06-07
Childminders	2,338	2,424	3.7%
Full Daycare	464	500	7.8%
Sessional Daycare	817	806	-1.3%
Out of School Care	560	556	-0.7%
Creche	77	66	-14.3%
All Settings	6,262	6,359	1.5%

- 2.5 The numbers of settings and places in Crèches declined significantly over the period.
- 2.6 Taking into account a proportion of all childminder places, the amount of daycare³ available increased by 6.7% over the period (3.5% in 2005-06)

¹ Care Standards Inspectorate for Wales June 2006 and June 2007

² This can be accounted for by the extraordinary loss of 4 settings in Monmouthshire with 990 places. Otherwise, the number of out of school places in Wales was relatively steady

and places for school-aged children⁴ decreased by -2.4% (0.2% in 2005-06).

- 2.7 Analysis by local authorities (*Figure 3*) in Wales showed that overall increases in registered childcare occurred in 16 out of the 22 areas compared with increases in 10 areas the previous year. The largest growth in registered provision took place in Powys, which saw an overall rise of 13% with increases in childminder, full daycare and out of school childcare places. Also seeing significant increases were Caerphilly (11%) and Pembrokeshire (10%).
- 2.8 The most significant loss of registered places took place in Denbighshire where there was an 6% decrease – mainly due to a drop in full daycare places – and in Bridgend where a large loss of sessional care resulted in an overall reduction of 4%.

³ Defined as care for more than 3 hours for children aged 4 and under ie. all full daycare places plus two-thirds of childminder places

⁴ All out of school places and a third of all childminder places.

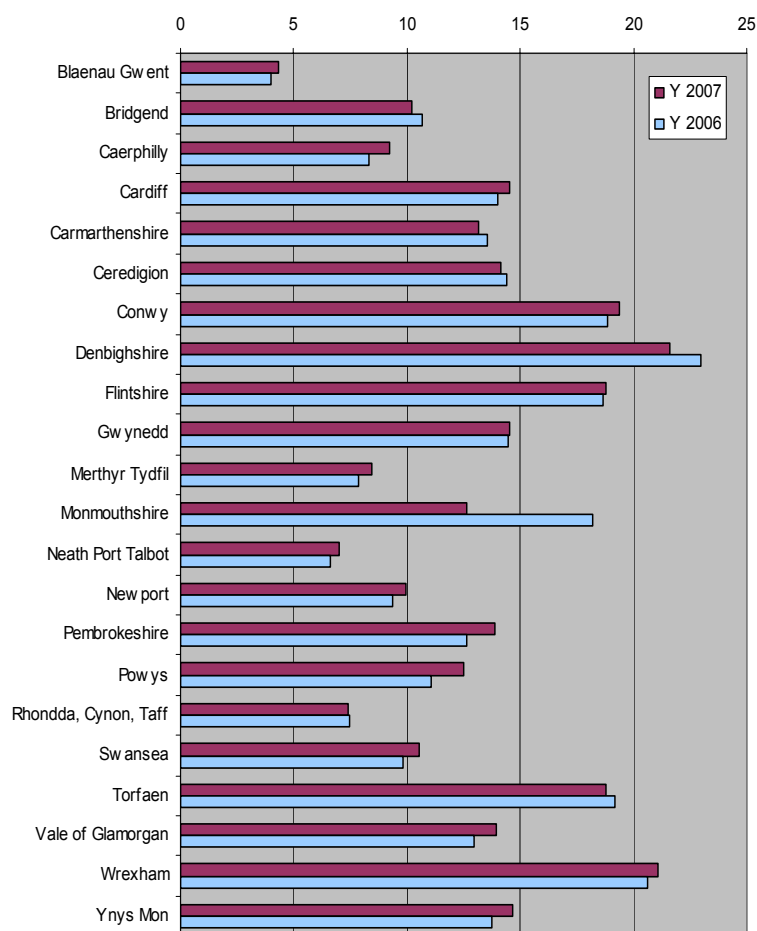
Figure 3: Registered Childcare Places by Local Authority 2006-2007

	Childminders		Full Daycare		Sessional Daycare		Out of School Care		Creche		Total	Change 2006-2007
	2006	2007	2006	2007	2006	2007	2006	2007	2006	2007		
Blaenau Gwent	128	143	94	123	137	155	92	80	52	42	543	8%
Bridgend	680	679	900	878	673	551	264	308	28	28	2,444	-4%
Caerphilly	695	756	628	888	723	634	604	635	90	90	3,003	11%
Cardiff	1,687	1,763	2,255	2,290	1,323	1,278	2,092	2,418	373	335	8,084	4%
Carmarthenshire	382	354	945	1,005	1,163	1,174	1,673	1,530	20	10	4,073	-3%
Ceredigion	295	272	344	395	595	521	494	404	8	12	1,604	-2%
Conwy	450	431	1,033	1,211	1,133	1,142	699	716	55	55	3,555	2%
Denbighshire	343	342	1,418	1,255	814	818	1,060	1,173	0	0	3,588	-6%
Flintshire	701	700	1,201	1,253	1,281	1,256	1,718	1,780	151	107	5,096	1%
Gwynedd	542	526	678	733	1,200	1,211	404	468	48	16	2,954	0%
Merthyr Tydfil	62	80	248	273	236	294	357	201	12	22	870	7%
Monmouthshire	353	379	614	658	581	633	1,248	290	17	17	1,977	-31%
Neath Port Talbot	404	422	329	440	270	228	730	580	0	0	1,670	5%
Newport	431	447	1,251	1,268	535	549	236	357	90	106	2,727	7%
Pembrokeshire	538	598	485	536	935	990	818	778	33	51	2,953	10%
Powys - Mid Wales	388	440	546	614	965	1,083	611	670	0	0	2,807	13%
Rhondda Cynon Taff	818	811	777	958	742	713	863	624	38	38	3,144	-2%
Swansea	683	724	1,628	1,602	653	616	802	1,046	16	16	4,004	7%
Torfaen	305	343	739	785	350	362	1,522	1,577	83	82	3,149	-2%
Vale of Glamorgan	1,022	1,059	514	705	765	721	695	704	85	32	3,221	8%
Wrexham	360	424	1,253	1,400	1,449	1,446	1,708	1,540	92	91	4,901	2%
Ynys Mon	361	333	194	278	768	789	258	293	54	37	1,730	6%
Wales	11,628	12,026	18,074	19,548	17,291	17,164	18,948	18,172	1,345	1,187	68,097	1%

3. Proportional Childcare Rates

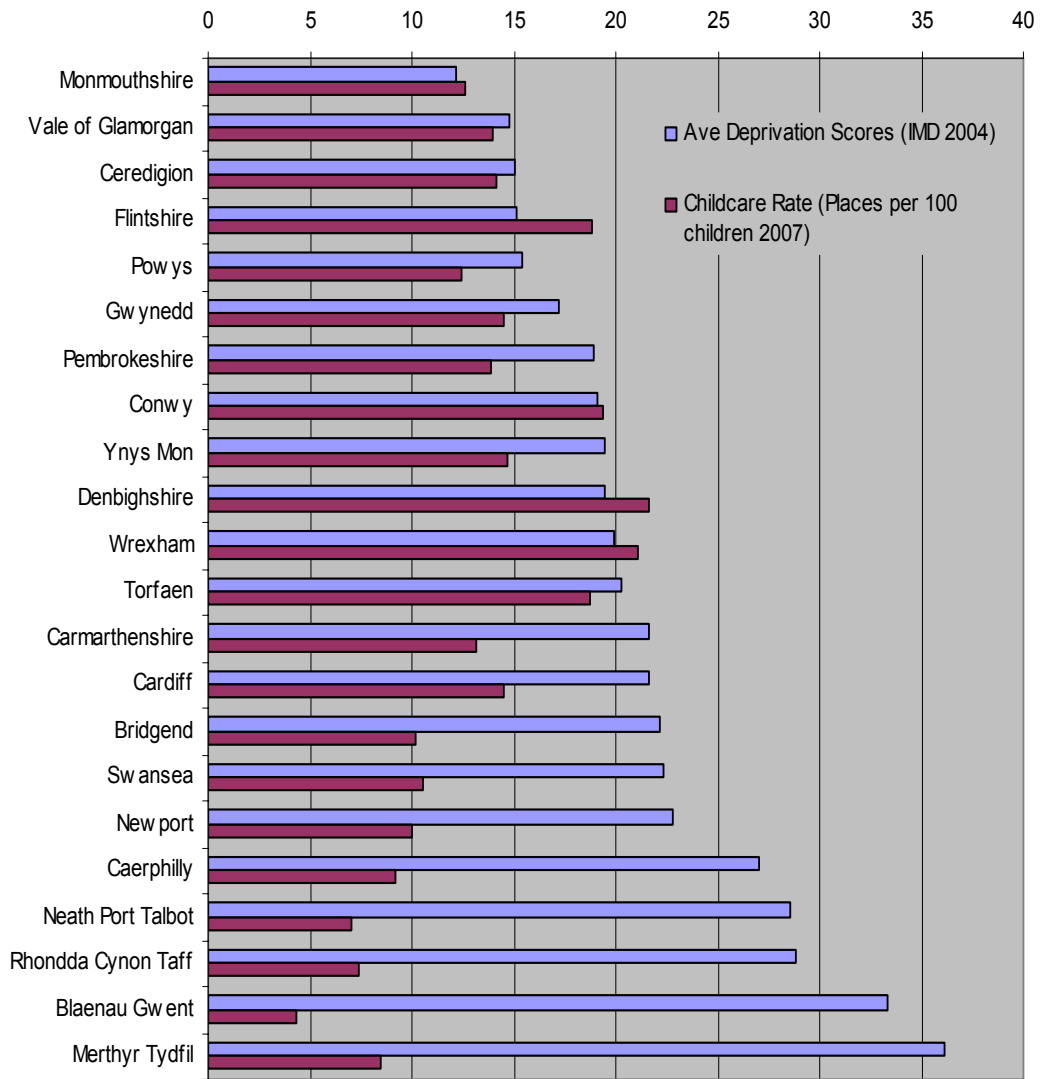
- 3.1 Comparative levels of childcare between local authorities can be ascertained by relating the number of registered places to the population of children in the relevant age group.
- 3.2 The overall proportion of childcare in Wales increased slightly from 12.8 places per 100 children aged 0 to 14 years in 2006 to 12.9 places in 2007.
- 3.3 Although there still remains a clear north-south split in childcare supply in Wales, differences would seem to be slowly eroding. A more accurate predictor of childcare is deprivation, with strong links between levels of poverty and childcare as shown in *Figure 5*.

Figure 4: Number of Registered Childcare Places (with Childminders, Crèches, Out of School Clubs, Full Daycare, Sessional Daycare) per 100 resident children aged 0 to 14 years of age⁵ 2006 and 2007.



⁵ ONS Mid-Term Population Estimates 2006

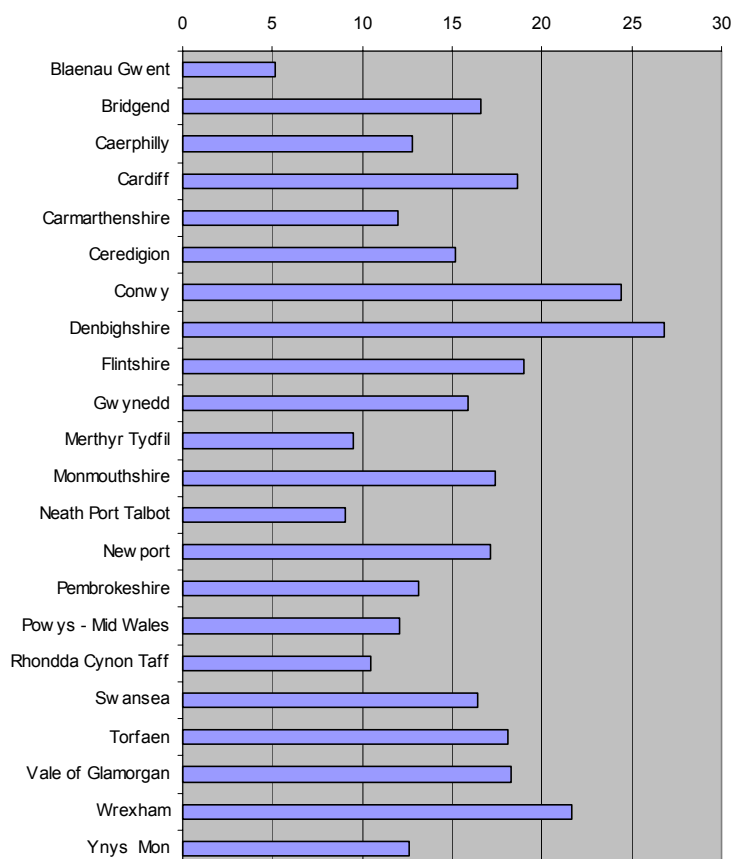
Figure 5: Relationship between childcare and deprivation



4. Daycare

4.1 Overall, there are 15.7 daycare places (full daycare and a proportion of childminding places) for every 100 pre-school children in Wales. This has increased from 14.8 places in 2005 and 14.9 places in 2006. Whilst the number of childcare places for pre-school increased between 2006 and 2007, levels are still inconsistent across Wales.

Figure 6: Amount of daycare available for Pre-School Children (places per 100 children aged 0 to 4 in population⁶)



4.2 As in 2006, Denbighshire has the highest level of early years childcare with one childcare place for every four children in the area while Blaenau Gwent still has the lowest with one place for every 20 children - despite having had the highest proportional rise in early years childcare in Wales between 2006 and 2007.

4.3 It is noticeable that while there are still real gaps in the volume of early years childcare in deprived areas compared to more affluent areas in Wales, most of the new provision opening during 2006-2007 was in less prosperous areas. Blaenau Gwent, Neath Port Talbot, Caerphilly and Rhondda Cynon Taff all recorded significant increases in the volume of daycare places. Although this may go some way to reduce inequality in provision, increases were also recorded in for example, Vale of Glamorgan showing that within a

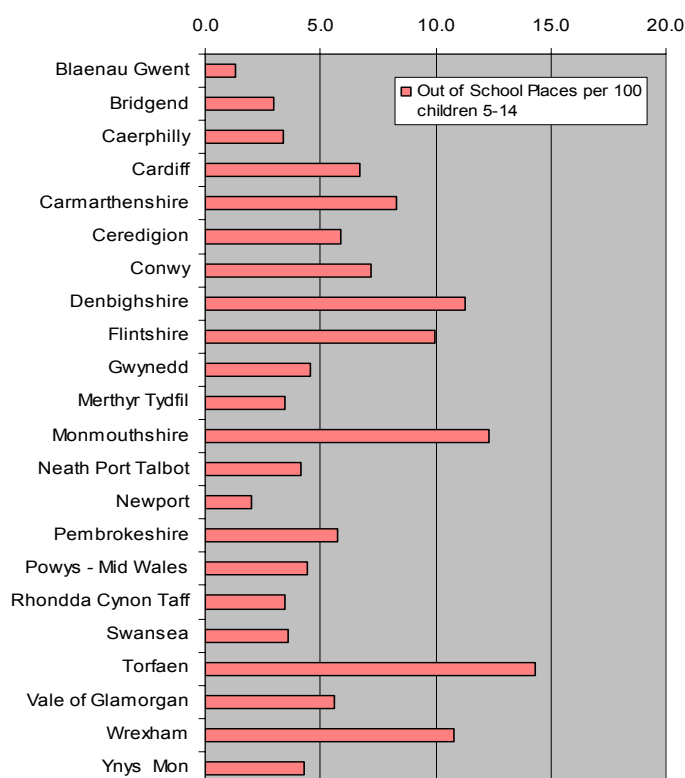
⁶ ONS Mid-Term Population Estimates 2006

mixed childcare economy with limited public funding, gaps between affluent and deprived areas are likely to remain.

5. Childcare for School Aged Children

5.1 In total, there were 556 out of school clubs registered in Wales in 2007. This was down from 560 settings in 2006 and 570 in 2005. The number of places fell by 776 between 2006 and 2007, although the extraordinary loss of 990 places in Monmouthshire masks a small amount of growth in the sector elsewhere.

Figure 7: Amount of registered childcare available for school-aged children (places per 100 children aged 5 to 14 in population⁷)



5.2 Overall, there was one out of school place⁸ in Wales, for every 16 children aged 5 to 14 years of age in 2007 (5.9 places per 100 children).

6. Sessional Daycare

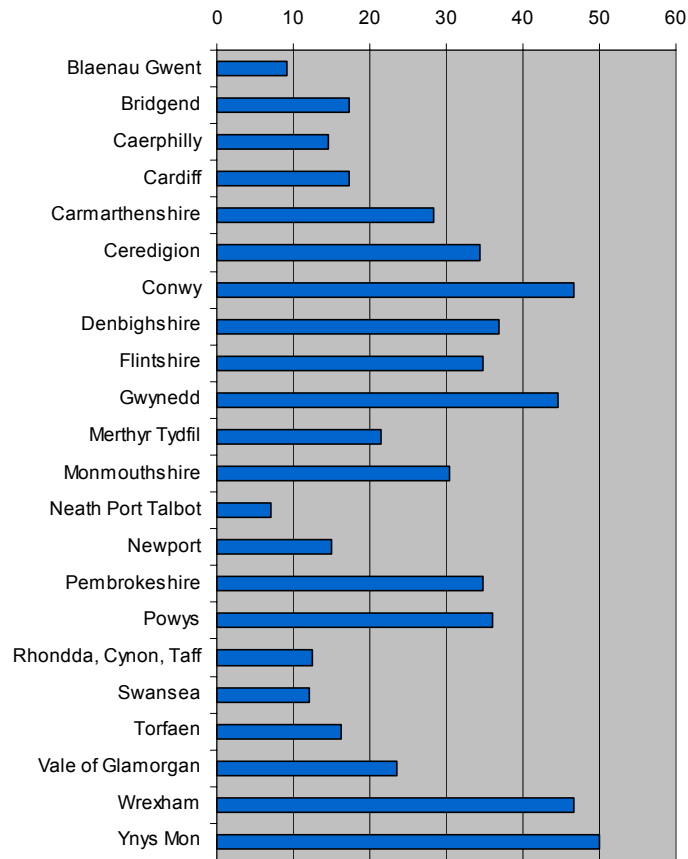
6.1 Between 2006 and 2007 the overall number of sessional daycare places fell by 1.3% with the loss of 11 settings in Wales, but overall, the number of places registered to Sessional Care settings fell by less than 1%.

6.2 Losses in sessional care places took place in 9 out of 22 areas with a continuing trend for those areas with high losses of sessional care having increases in full daycare.

⁷ ONS Mid-Term Population Estimates 2006

⁸ Figure includes all registered out of school club places and a third of registered childminder places

Figure 8: Amount of registered sessional daycare available for children aged 3 and 4 (places per 100 children) 2005 and 2006



- 6.3 The amount of sessional care is disproportionate across Wales with provision concentrated in north, mid and west Wales.
- 6.4 The total stock of sessional daycare represents just over one sessional care place for every four children aged 3 and 4 years of age.

7. Summary

- Overall levels of childcare in Wales rose slightly in the year June 2006 to June 2007.
- Across Wales, the amount of childcare available to families varied widely with proportionally more childcare – and choice of childcare – in North Wales.
- There seems to be a strong link between the distribution of registered childcare in Wales and levels of deprivation.
- The expansion of the full daycare sector in Wales continued over 2006-2007 with nearly 1,500 new places created. Strong growth was seen in some traditionally deprived areas – maybe as places in new Integrated Children’s Centres came on-stream.
- The number of registered childminders in Wales increased again by a small amount.
- In 2007 there were 15.7 daycare places available for every 100 children aged 0 to 4 in Wales (a daycare place for every 6.4 children). This compares with 20.6 places per 100 children in England⁹ and 24.1 places in Scotland¹⁰.
- There was a reduction in both the number of settings and number of places in sessional daycare settings - a trend that has continued from 2005-2006. However, some areas experienced strong growth in Sessional Care that could be a response to Flying Start initiatives.
- The number of settings and places in registered out of school settings fell again in 2006-2007. In Wales, there was an out of school childcare place for every 16 children aged 5 to 14 years of age (5.9 places per 100 children aged 5 to 14 years; 5.3 in England; 9.5 in Scotland)

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⁹ OfSTED: Quarterly childcare Statistics as at: 30 June 2007

¹⁰ The Scottish Government Pre-School and Childcare Statistics 2006