



Little steps, big struggles:

Childcare in Wales

Table of Contents

Acknowledgements.....	iii
1. Introduction	4
1.1. Research focus	5
2. Childcare Provision in Wales: Setting the Picture.....	6
2.1. Childcare is a social infrastructure	6
2.2. Funded childcare support in Wales.....	9
2.2.1. Flying Start	9
2.2.2. 30 hours Funded Childcare Offer for 3-4 years olds: <i>The Offer</i>	12
2.2.3. Parents in Education	13
2.2.4. Limitations of childcare offers	13
2.3. Benefit system and the “English Offer”	16
2.4. To sum up... ..	18
3. Access to Childcare Provision	20
3.1. Access to formal childcare	22
3.2. Use of informal childcare	26
3.3. Quality of childcare	28
3.4. To sum up... ..	30
4. The Cost of Childcare	31
4.1. Impact of childcare cost on parents.....	32
4.2. Impact of childcare cost on employment	37
4.3. Impact of childcare on wellbeing and mental health	43
4.4. To sum up... ..	44
5. Access to Funded Childcare Support in Wales	46
5.1. Access to funded childcare.....	46
5.2. Impact of funded childcare on families.....	47
5.3. Challenges in accessing funded childcare	49
5.4. To sum up... ..	52
6. Needs and Recommendations of Parents	53
6.1. Childcare needs of parents	53
6.2. Parents’ asks from the Welsh Government	54

6.3. Parents' recommendations	55
6.4. To sum up... ..	57
7. Conclusion and Recommendations	58
7.1. Conclusion	58
7.2. Recommendations	59
Appendix 1 - Research Methodology and Survey Demographics	61
A.1.1. Respondents profile.....	61
Participant demography	63
Limitations of the research	66
A.1.2. Childcare provisions referred in the survey	66
Appendix 2 - Childcare for disabled children and children with special needs.....	67
Informal care.....	70
Funded childcare in the case of parents of disabled children or children with health conditions and special needs:.....	70
Parents' needs and recommendations	72
To sum up.....	74

Acknowledgements

This research report was written to share research results, to contribute to public debate and to invite feedback on development and humanitarian policy and practice. It does not necessarily reflect the policy positions of the organisations jointly publishing it. The views expressed are those of the author and not necessarily those of the individual organisations.

This research was carried out by [Oxfam Cymru](#) on behalf of [Make Care Fair Coalition](#). The research was conducted and reported by Dr Hade Turkmen, with the contribution of Sarah Rees, Rebecca Lozza from Oxfam Cymru and Make Care Fair Coalition steering group members including Carers Wales, Race Council Cymru, TUC Cymru and WEN Wales.

This study should be cited as:

Turkmen, H. (2023). *Little Steps, Big Struggles: Childcare in Wales*, Cardiff: Oxfam Cymru/Make Care Fair Coalition.

For more information, or to comment on this paper, email oxfamcymru@oxfam.org.uk

1. Introduction

Childcare is a critical pillar within the infrastructure of a thriving society. It is far more than a service; it represents an indispensable necessity for the prosperity of families and the development of children. Access to quality childcare not only empowers parents to participate in the workforce, thus enhancing their economic well-being, but it also ensures that children receive essential early learning experiences that significantly influence their future success. In a broader societal context, reliable and accessible childcare supports workforce diversity, economic growth, and gender equality. Access to affordable and high-quality childcare is not only a fundamental right but also a vital component of any comprehensive strategy to address economic inequalities and provide a strong foundation for the next generation.

While access to high-quality childcare has remarkable benefits, the lack of it exerts a profound impact on families, particularly on women. A lack of childcare and barriers to access to childcare affect the ability of parents, particularly mothers' participation in the workforce. Currently, the cost of childcare is a significant barrier for many families, and those with lower and middle income hit the hardest. The inability to afford childcare can have severe consequences such as financial insecurity and withdrawal from the labour market, especially for women. This can lead to a vicious cycle of poverty. The lack of affordable childcare and support creates a ripple effect that causes financial constraints for families, perpetuates poverty, social inequalities, and limits opportunities for children's development and future success.

Significant improvements have been witnessed in childcare and early education in Wales over the years. However, despite these commendable efforts, it remains evident that many families still struggle to access high-quality and affordable childcare. Providing equitable opportunities for all children and their families is still a pressing concern, and there is still work to be done to bridge the gap. With the rising cost of living and child poverty, taking bold actions to provide quality childcare has become increasingly important.

Through this research paper, our primary objective is to contribute to the ongoing dialogues surrounding the enhancement of childcare provision and support in Wales. We aim to do this by providing a platform for parents to share their experiences and insights into access to childcare and childcare support in Wales. By amplifying the voices of those directly impacted, we aim to shed light on the real-world challenges and opportunities in childcare provision.

We recognise that childcare is a complex domain, considering both policy and service delivery, given the extensive and diverse array of needs among families and children. From

affordability and accessibility to flexibility in work hours and the need for specialised care for children with unique requirements, childcare is a complex area of policymaking. Recognising this diversity and comprehending the intricate web of familial, economic, and societal factors is essential.

Within this crucial social infrastructure, a one-size-fits-all approach has proven inadequate, leaving numerous families and children out of access to childcare. This report discusses the need for bold, proactive measures to address the issues within the childcare sector, including changing the narrative around it. To establish a sustainable childcare system based on a strong foundation, we must adopt innovative strategies and solutions to confront the challenges.

1.1. Research focus

The research aims to understand parents' and primary carers' experiences of accessing childcare in Wales, what they see as limitations, and what they need. The survey conducted in the scope of this research targeted parents with children under nine years old, living or having access to childcare in Wales, to understand better their experience with government-supported or funded childcare in Wales.¹

This research focuses on funded childcare support in Wales provided by the Welsh Government. The support provided by the UK Government through Universal Credit and Tax-Free Childcare is not included in the discussion.

Who is behind the research?

This research is conducted by [Oxfam Cymru](#) on behalf of the [Make Care Fair Coalition](#).

The coalition was established to highlight the inequalities and challenges facing paid and unpaid carers, often women, inequalities in accessing childcare and the challenges faced by the care sector in Wales. The primary objective of the coalition is to work together to create a Wales where carers are treated fairly, and where high-quality, affordable childcare and social care is available to everyone who needs it.

With a specific emphasis on the interconnectedness of childcare, social care and unpaid care with poverty and inequality in Wales, Oxfam Cymru and the Make Care Fair Coalition aim to break the cycle and promote a more equitable and just society for all.

¹ For the research methodology and demography of research participants, please see Appendix 1.

2. Childcare Provision in Wales: Setting the Picture

This section explores the current provisions made by the Welsh Government and discusses the accessibility and affordability of childcare support, while also highlighting the limitations of the current system.

2.1. Childcare is a social infrastructure

Childcare is a pivotal social infrastructure, essential for both early childhood development and parental employment. Despite its crucial role, many families face significant constraints in accessing affordable and high-quality childcare services in Wales.

OECD 2022 figures show that the UK has the third most expensive childcare, with only the Czech Republic and New Zealand more expensive in net childcare costs.²

The table below taken from Coram’s Childcare Survey 2023 shows the childcare cost in Great Britain between November 2022-February 2023.³

Table 1: Part-time (25 hrs) childcare for children under 3 years old a week				
	Nursery		Childminder	
	Under 2	2 years old	Under 2	2 years old
Great Britain	£148.63	£144.01	£125.91	£126.59
England	£150.89	£146.00	£126.20	£126.98
Scotland	£118.14	£114.81	£125.16	£124.78
Wales	£135.67	£134.92	£121.63	£121.15

Table 2: Full-time (50 hrs) childcare for children under 3 years old a week				
	Nursery		Childminder	
	Under 2	2 years old	Under 2	2 years old
Great Britain	£285.31	£279.60	£247.19	£246.95
England	£289.98	£283.95	£247.72	£248.00
Scotland	£227.17	£225.44	£246.27	£234.29
Wales	£250.95	£249.24	£239.15	£237.78

Source: Coram Family and Childcare Trust, Childcare Survey 2023

The report reveals a 2.8% increase in the prices of 25-hour nursery care for children under three in Wales compared to the previous year. Although the report suggests minimal changes in full-time childcare prices over the same period, it is worth noting that the cost of

² OECD (2022), [Net Childcare Costs](#)

³ Coram Family and Childcare Trust (2023), [Childcare Survey 2023](#),

childcare gradually increasing due to the current economic situation. In some areas of Wales, many nurseries charge a daily rate of between £60-£70 for full-time care.

The impact of childcare costs on families in Wales can be better understood by examining average income and women's employment.

The median annual income in Wales in 2022 averaged approximately £26,000 for all workers.⁴ Breakdown by gender reveals that women earned an average of £22,000, while men earned around £30,200. For full-time workers, men earned an annual salary of £32,229 (approximately £26,000 take-home salary), while women earned £28,257 (approximately £23,250 take-home salary)⁵. For part-time workers, the gross annual salary for male employees was £11,270, and for female employees, it was £12,200 in Wales.⁶ These figures demonstrate that the average annual cost of full-time childcare constitutes nearly half of the average full-time gross annual income of women.

When examining working patterns, a noticeable gender disparity emerges between men and women in full-time and part-time roles. Current data reveals that, among individuals aged 16-64 in employment, 37.4% of women work part-time, whereas only 13.6% of men in the same age bracket do so.⁷ Furthermore, when considering working patterns by age, we see that 32.6% of women aged 25-49 in employment are in part-time work, while the equivalent figure for men in the same age group is a mere 7.2%.⁸

Childcare remains one of the main reasons for women to be economically inactive. In Wales, 25.5% of economically inactive women are out of work due to “looking after family/home”, compared to only 6.8% of men.⁹ Many women face the difficult decision of not returning to work due to childcare responsibilities, primarily because their income does not sufficiently cover the high costs associated with childcare. In many cases, the financial reality creates a situation where it simply does not make sense for them to re-join the workforce.

Childcare costs are closely intertwined with the issue of poverty, creating a significant barrier for low-income families. For families living in poverty, accessing affordable childcare remains a persistent challenge. The high price tag associated with childcare often places it well beyond the financial means of those who need it the most. This financial strain further compounds the cycle of poverty, as it can hinder parents' ability to seek and maintain employment, pursue educational opportunities, or improve their economic circumstances.

⁴ Annual Survey of Hours and Earning, Workplace Analysis, Annual Gross Income 2022 via Nomis.

⁵ Both figures fall below the respective UK averages of £35,260 for men and £29,684 for women.

⁶ Annual Survey of Hours and Earning, Workplace Analysis, Annual Gross Income 2022 via Nomis. These figures are also slightly less than the UK averages of £12,000 for men and £12,332 for women.

⁷ Annual Population Survey April 2022-March 2023 release; retrieved via NOMIS, September 2023.

⁸ Ibid.

⁹ Ibid. In Wales, 27.4% of women aged 16-64 are economically inactive compared to 21.5% of men.

The connection between childcare and poverty becomes more apparent when considering intersecting factors. In Wales, 28% of children were living in relative income poverty.¹⁰ As in previous years, in 2022, single parents faced the highest risk of relative income poverty, with 38% compared to other household compositions.¹¹ Couples with children faced a lower but still significant risk, with 22% of them at risk of relative income poverty. There is also strong evidence of the relation between other protected characteristics, such as ethnicity and disability, and poverty.¹²

The figures also release the strong connection between poverty and gender. Census 2021 released that 85.9% of the lone/single parents in England and Wales were women, and 14.1% were men. 56% of all lone/single parents were women and had at least one dependent child compared to 6.5% of men.¹³

Even though the figures are striking and demonstrate a clear impact of childcare on families' finances and parents', especially women's, engagement in the labour market, childcare support remain insufficient and inaccessible for many families, creating a distressing cycle that traps families in economic hardship.

The availability and accessibility of childcare services can also be challenging for parents to secure care for their children as they can be patchy, with limited options in many regions. Coram's Childcare Survey 2023 reveals notable statistics regarding childcare accessibility. In Wales, the availability of childcare appears to be inconsistent, as a significant number of local authorities (LAs) report insufficiencies across their areas of responsibility.¹⁴

¹⁰ Welsh Government (2023) [Relative income poverty, April 2021-March 2022](#)

¹¹ In general, single households are at a greater risk of being in relative income poverty. The highest risk group, single parents, is followed by single male pensioners with 31% and single female pensioners with 29%. Single households without children are at 25% risk of being in relative income poverty.

Source: Stats Wales, [People in relative income poverty by family type](#).

¹² Latest poverty statistics show that there was a 40% likelihood of people whose head of household comes from a Black, Asian or minority ethnic group living in relative income poverty. This compares to a 22% likelihood for those whose head of household comes from a white ethnic group. Relative income poverty is also high among families with disability in the family. In the latest period (FYE 2020 to FYE 2022), 31% of children who lived in a family where there was someone with a disability were in relative income poverty compared with 26% of those in families where no one was disabled. For working-age adults, 28% who lived in a family where there was someone with a disability were in relative income poverty compared with 16% of those in families where no one was disabled. (Welsh Government (2023) [Relative income poverty, April 2021-March 2022](#))

¹³ ONS, [Families in England and Wales: Census 2021](#)

¹⁴ Comparing childcare sufficiency between nations can be challenging due to variations in structures and data collection methods. Nevertheless, the figures from the Coram childcare survey highlight that both Wales and Scotland lag behind England, with the caveat that significant data deficiencies may impact Scotland's assessment.

- **Childcare sufficiency for children under two years old:** Only 15% of the local authorities reported having sufficiency in all areas, while 70% said they have sufficiency in some areas. 5% revealed a complete absence of childcare sufficiency for children in this age group.
- **Childcare sufficiency for disabled children:** It's concerning to note that none of the local authorities (LAs) reported having childcare sufficiency in all areas for disabled children. A significant portion, 55%, mentioned having some level of sufficiency in certain areas. A worrying 30% of LAs indicated that they lacked childcare sufficiency for disabled children entirely. 15% either stated that they did not possess the necessary data to assess the sufficiency or were unable to provide a clear response.
- **Childcare sufficiency for parents working full time:** For parents working full-time, just 25% of local authorities (LAs) indicated having childcare sufficiency in all areas, while the majority, constituting 75%, stated that sufficiency was available in some areas.
- **Childcare sufficiency for parents working atypical hours:** A majority of local authorities, 60%, reported having childcare sufficiency for parents working atypical hours in specific areas only, while 30% acknowledged a complete lack of such sufficiency. Notably, none of the LAs indicated having sufficiency in all areas for this particular group of parents.
- **Childcare sufficiency for families living in rural areas:** None of the local authorities (LAs) reported full sufficiency in all areas for families living in rural regions. A majority of LAs (60%) stated that they had some degree of sufficiency in select areas, while a significant 33% of LAs reported a complete absence of sufficiency for families in rural areas.

2.2. Funded childcare support in Wales

Funded childcare support provided by the Welsh Government remains limited and often out of reach for numerous families. At present, the primary support mechanisms for children aged 2-4 years old are Flying Start programme and the 30 Hours Funded Childcare Offer. Additionally, some assistance is available for parents who are in education. However, these initiatives still leave significant gaps in accessible childcare support. Currently, no support is offered by the Welsh Government for children under 2 years old.

2.2.1. Flying Start

Flying Start is the Welsh Government's Early Years programme targeting children aged under 4 who live in certain areas determined as disadvantaged/deprived.¹⁵ The Flying Start

¹⁵ The policy context behind the Flying Start programme is based on the Welsh Government commitment to the principles of the United Nations Convention on the Rights of the Child (UNCRC). To further fortify this

programme is part of a strategy to tackle poverty by mitigating the negative impact it has on early childhood development. The programme has targeted areas according to measures of relative disadvantage, including the Welsh Index of Multiple Deprivation, free school meals and the proportion of children under four in households receiving income related benefits.¹⁶

The Programme comprises of four entitlements which provide:¹⁷

- 'funded'¹⁸ quality, part-time *childcare* for 2-3 year olds;
- an intensive health visiting service;
- access to parenting support; and
- support for speech, language and communication development.

The core Flying Start childcare offer is made available to parents/carers of all eligible 2–3-year-olds for 12.5 hours per week, 39 weeks of the year, in line with school terms. In addition, there should be a minimum of 15 sessions of flexible childcare and/or play provided for the child or family during the school holidays. Sessions are lasted 2 ½ hours per day, 5 days a week.¹⁹ However, there might have *some* flexibility in how the 5 sessions are split across the week, where a parent/carer requests a different arrangement, such as when they attend a training course or go to work. Both the Flying Start setting and the family must agree on this arrangement.²⁰

Local Authorities (LAs) are granted the flexibility for customisation to address locally identified needs and discretion to define the structure and composition of their Flying Start Childcare provision. As a result, there may be a range of provision settings that can vary from one area to another, and include:²¹

- Mixed settings (Flying Start and non-Flying Start children)
- Flying Start only settings
- Maintained schools

commitment, Wales took a historic step by enacting 'The Rights of Children and Young Persons (Wales) Measure 2011,' thereby establishing a legal framework to safeguard children's rights. In doing so, Wales became the first nation to enshrine these vital protections into law.

¹⁶ National Assembly for Wales, Children, Young People and Education Committee (2018) [Flying Start: Outreach](#).

¹⁷ [Flying Start Health Programme Guidance \(2017\)](#)

¹⁸ In Welsh Government's guidance, childcare offerings are referred to as "free" childcare. While this support does render childcare costs "free" up to certain hours for parents, it is more accurate to describe it as "funded" since the Welsh Government covers the costs for childcare providers. The widespread use of the term "free" to describe childcare can unintentionally distort perceptions and undervalue the substantial efforts of childcare providers as well as the true cost of delivering quality childcare services.

¹⁹ [Flying Start Health Programme Guidance \(2017\)](#)

²⁰ Welsh Government, [Flying Start Childcare Guidance](#), published on 17 April 2023.

²¹ Ibid.

- Voluntary/ community/ independent settings including day nurseries, English and Welsh medium play groups, Cylchoedd Meithrin²² and childminders.

While flexibility is essential in programme implementation, it introduces various stakeholders and childcare provisions, resulting in service disparities across local authorities. For instance, in some areas, while families must utilise available spaces in Flying Start centres, whereas in other areas, they can opt for a day nursery.

The disparities resulting from the varying implementation of the Flying Start programme across different local authorities are primarily attributed to the significant differences in childcare infrastructure among these authorities. In Coram's Childcare Survey 2023, 55% of the LAs indicated that they had sufficiency for Flying Start provision in all areas, while 40% said they could only cover this service in some areas.²³

Differences in childcare support across the nations

The funded childcare support for children aged 2-3 in England and Scotland differs from Wales' Flying Start programme. In both England and Scotland, support is extended to parents receiving specific benefits (including in-work benefits) or children who are looked after. In contrast, Wales' eligibility criteria are geographically based, with a focus on the parents' place of residence. Consequently, the term 'postcode lottery' is frequently used to describe the variance in access to the Flying Start programme.

The hours provided in England and Scotland also differ from Wales. *The Offer* in England grants 15 hours a week in term time for 38 weeks for parents in receipt of benefits (including in-work benefits) or children who are disabled or looked after, totalling 570 hours of funded childcare. In Scotland, *the Offer* provides up to 1,140 hours a year for parents in receipt of certain benefits (including in-work benefits) or children who are looked after, making it approximately 30 hours of funded childcare during the term time. In Wales, *the Offer* provides 12.5 hours per week during the term time making it 487.5 hours in total. These numbers suggest that Scotland has the most generous offers among the other nations.

Expansion of Flying Start

The Cooperation Agreement between the Welsh Government and Plaid Cymru commits to expanding funded childcare for all two-year-olds with a particular focus on providing and strengthening Welsh-medium childcare.²⁴

²² Cylchoedd Meithrin is Welsh medium play group. The aim of the Cylch Meithrin is to promote the education and development of children from two years old to school age.

²³ Coram Childcare Survey, 2023. op cit.

²⁴ Welsh Government (2021) [Cooperation Agreement 2021](#).

In 2022, the Welsh Government initiated the expansion of the Flying Start project. The Phase 1, which commenced in September 2022, included all four programme components.²⁵ Phase 2 of the Flying Start expansion, focused solely on the funded childcare component, aims to reach more children in the years 2023-24 and 2024-25.²⁶

The government's plan to expand the Flying Start programme does not include increasing funded childcare hours or introducing a universal offering beyond postcode eligibility criteria. The programme's primary focus is to address poverty and deprivation by ensuring high-quality childcare access for children in certain areas, but not directly supporting parents.

2.2.2. 30 hours Funded Childcare Offer for 3-4 years olds: *The Offer*

In contrast to the Flying Start Programme, the 30-hours Funded Childcare Offer for 3-4-year-olds, known as "*The Offer*", is geared towards assisting parents with childcare expenses. Eligible parents can access 30 hours of funded childcare for 48 weeks annually. This allocation comprises a minimum of 10 hours of early education per week within a maintained school nursery setting and a maximum of 20 hours of weekly childcare in registered childcare facilities. It's important to note that these hours in distinct settings are not interchangeable.²⁷

The eligibility criteria of *the Offer* are based on parents' income and employment, which are different to Flying Start. To access *the Offer*, both parents (if a 2-parent family) should:

- Live in Wales
- Be employed and earn at least, on average, the equivalent to working 16 hours a week at the National Minimum Wage or Living Wage
- Each has a gross income of £100,000 or less per year
- OR
- Be on Statutory Pay and Leave (Sick, Maternity, Paternity, Parental, Bereavement or Adoption Leave)
- OR
- Be enrolled on a further or higher education course that is at least 10 weeks in length.

The eligibility criteria of *the Offer* clearly show that it is designed for working parents, which makes *the Offer* inaccessible to many parents on low incomes, unemployed or in training outside of further or higher education.

²⁵ Welsh Government, 14 June 2023, [Flagship programme to expand Flying Start exceeds target in first phase.](#)

²⁶ Welsh Government, 18 November 2022, [Phased expansion of Early Years Provision.](#)

²⁷ Welsh Government, [Get 30 hours of childcare for 3 and 4 year olds.](#)

2.2.3. Parents in Education

Support for parents engaged in education or training is limited, and with the loss of EU funding and budget shortfalls, previously existing programmes are also reaching their final stages.²⁸

Parents/guardians in further or higher education can access Flying Start and *the Offer* if eligible. Alongside these support programmes, students can receive the Childcare Grant provided by Student Finance Wales for undergraduate Welsh students.²⁹ The childcare grant student parents can get from this service depends on their household income number of children, their childcare costs, and the intensity of their study.³⁰

Undergraduate students can also apply for Parents' Learning Allowance through Student Finance Wales.³¹ How much they get depends on their household income, their dependants' income and whether or not they have a partner.³²

There are currently no specific support systems in place for postgraduate students who are also parents, or for parents who are engaged in further education. However, parents who are in education or training can still make use of the Flying Start program if they reside in a Flying Start area for their two-year-old children, as well as *the Offer* for their children aged between 3 to 4 years. It's important to note that *the Offer* is not available to parents who are undergoing short-term skill training courses.

2.2.4. Limitations of childcare offers

The funded childcare support in Wales, unfortunately, falls short of meeting the diverse needs of many households. Although these programmes have undoubtedly alleviated the financial burden for some parents, their limitations, including specific eligibility criteria, age group restrictions, and variable availability, have left many families without the comprehensive assistance they require. Below are some of the limitations and challenges of the current childcare support:

²⁸ PaCE (Parents, Childcare and Employment), a limited childcare support scheme jointly funded by the Welsh Government and the European Social Fund, aimed to help unemployed parents and those not in employment, education or training (NEET). It targeted economically inactive parents aged 25+ and young parents aged 16 to 24. With the loss of EU funding, no further announcement made for the extension of the programme.

Evaluation of Parents, Childcare and Employment (PaCE): [Final Summative Evaluation Report](#). (Feb 2023)

²⁹ <https://www.studentfinancewales.co.uk/undergraduate-finance/full-time/welsh-student/what-s-available/childcare-grant/>

³⁰ Undergraduate student parents can get 85% of your childcare costs up to a maximum of £187 per week for 1 dependent child and £321 per week for 2 or more dependent children. Ibid.

³¹ Ibid.

³² For 2023-24 academic year, the allowance was set between £52 and £1,896 a year. Ibid.

- **Age Group Limitations:** One of the most prominent challenges with the current childcare support is the age group eligibility criteria. The available programmes do not extend support to children under 2 years old, placing parents in considerable financial hardship.

- **Flying Start:**
 - While Flying Start aims to offer childcare services, its primary objective is to provide support to children to mitigate the impact of poverty on their development. This specific focus means that the programme does not align with the aim of supporting parents in employment, offering only a limited 2.5 hours in a designated setting. As a result, it may not meet the needs of parents who rely on more extended and flexible childcare options to balance their paid work commitments.
 - The postcode-based eligibility criteria of the Flying Start Programme pose a significant challenge for many families. A 2018 report from the Senedd Children, Young People, and Education Committee underlined this issue by stating, *“Around 1 in 5 of the people in income benefit households live in the most deprived 10 per cent of areas in Wales. This means that although it is true to say that deprivation is much more concentrated in some areas than others, 4 out of 5 people in income benefit households live outside these areas.”*³³
 - The location-based eligibility of the Flying Start programme creates disparities among the targeted groups as children living outside of these cannot access the programme unless the local authorities offer additional support. The eligibility criteria do not consider the families' income levels, despite the programme's aim to reduce poverty.
 - The disparity in childcare provision among different local authorities leads to unequal service delivery. For instance, in some areas, parents have the flexibility to choose private day nurseries, while in other regions, they are constrained to use specific designated Flying Start centres. This discrepancy in available options results in inconsistent access to childcare services, creating an imbalance in the support provided to families across various geographic locations.
 - The expansion of the Flying Start programme is not structured as a universal support system but rather as an extension of its geographical coverage. The primary intention of the expansion is to empower local authorities to reach more families, yet it would not offer sufficient support to families with two-year-old children.

³³ “...This is important to remember when targeting resources, as targeting those ‘most deprived’ areas leads to some households in those areas who may not be deprived being included and many deprived households living in less deprived areas missing out.” National Assembly for Wales, Children, Young People and Education Committee (2018) [Flying Start: Outreach](#).

- **30 Hours Funded Childcare Offer**
 - In contrast to the Flying Start programme, *the Offer* primarily focuses on parents in employment, without extending support to unemployed, economically inactive parents, or parents in training. The income eligibility criteria of *the Offer*, unfortunately, result in the exclusion of numerous families. For instance, if one partner works less than 16 hours a week or earns less than the equivalent of 16 hours at the National Living Wage, or if they are unemployed or engaged in training, they are only eligible for 12.5 hours a week in a school nursery setting, limiting their access to the full 30-hour Offer. This criterion creates challenges for these families in terms of securing adequate childcare support.
 - The accessibility of *the Offer* raises concerns from both ends of the income spectrum. While it is beyond reach for many low-income families due to restrictive criteria, the upper threshold of *the Offer* also raises questions about equity. The upper threshold, set at £100,000 for each parent, appears quite generous and may inadvertently favour higher-income families. This disparity can lead to imbalances in access to *the Offer*, effectively excluding families in genuine need, including unemployed parents. It highlights the need for a more equitable approach to ensure that families in different income brackets receive appropriate assistance.
 - One of the challenges associated with *the Offer* is the need for wraparound care for children. Parents are unable to fully utilise the 30-hour offer in a single setting, as the programme only covers 12.5 hours in a school setting and 17.5 hours in another registered setting.

- **Shortage of flexible options:** The limited availability of childcare options for parents engaged in shift work, such as in the demanding field of health and social care, a workforce dominated by women, poses a significant challenge. The existing childcare support schemes often fail to accommodate the needs of parents with unstructured working hours, as they are typically applicable only within maintained settings and during structured hours.

- **Parents in training and education:** The absence of adequate childcare support for individuals undergoing various types of training, including short courses and skill development programmes, poses a challenge for some families. These training opportunities are often essential for participating in the labour market and skill development, yet the lack of accessible and affordable childcare can deter parents and guardians from participating.

- **Budgetary constraints:** In August 2023, the Welsh Government disclosed a substantial budget deficit of £900 million.³⁴ Prior to this announcement, the Welsh Government had

³⁴ Written Statement: [Update about Budget 2023-24, 9 August 2023.](#)

already discontinued free school meals during school holidays due to budgetary constraints.³⁵ The financial challenges further escalated in August 2023 when worrisome figures concerning local council finances were released.³⁶ Most recently, in October 2023, the Welsh Government introduced stringent financial measures in response to the funding crisis.³⁷ While budgets for transportation and the National Health Service (NHS) have been secured, social services are slated to face budget cuts. These cuts may also affect funded childcare support, as due to a low take-up rate, funds have been released from the childcare Offer budget.³⁸ However, there is no clear statement about whether these released funds will be allocated to childcare provision. The situation highlights the ongoing challenges in balancing budget constraints with providing essential services, including childcare support. This situation will likely put the expansion of funded childcare at risk.

- **Limited funding for childcare settings:** The financial constraints also have a significant impact on the services offered by childcare providers. The childcare providers have expressed their concerns with the current funding of £5 per hour per child, which is inadequate to ensure high-quality childcare and decent working conditions for sector workers.³⁹

2.3. Benefit system and the “English Offer”

One of the important topics in Welsh childcare discussion is the effect of the benefits system, which is a non-devolved area. Benefits play a crucial role in the lives of many families, but the current system has many shortcomings.⁴⁰

Universal Credit (UC), the primary working-age benefit in the UK, has long been considered problematic and insufficient in meeting the needs of parents, lacking a gender equality perspective. Policies such as the benefit cap, the two-child limit, and payment at a household level do not effectively support women and run the risk of further exacerbating their financial struggles and pushing them deeper into debt and poverty, especially as the

³⁵ [No money for summer holiday meals, says Drakeford](#), BBC News, 13 July 2023,

³⁶ The huge black hole in Welsh local council finances, Wales Online, 22 August 2023.

³⁷ [Mark Drakeford makes 'crisis' cuts to prop-up NHS and trains](#), BBC News, 17 October 2023.

³⁸ The Finance Minister Rebecca Evans MS mentioned there will be a release of £16.1 million due to the low take up of the childcare offer. Rebecca Evans MS, Minister for Finance and Local Government, [Plenary Statement, 17 October 2023](#).

³⁹ Information about the childcare offer for providers: <https://en.powys.gov.uk/article/6351/Childcare-Offer-for-Wales---Provider-Information>

Also see [National Day Nursery Association's statement](#)

⁴⁰ Parents who receive universal credit can get up to 85% of childcare costs paid back to them. From June 2023, the maximum amount a month is £950.92 for one child and £1,630.15 for 2 or more children. UK Government, [Universal Credit childcare costs](#).

cost of living continues to rise.⁴¹ The additional sanctions and benefit conditionalities introduced in the Spring budget of 2023 only compound the challenges faced by parents, particularly women, in the midst of a cost-of-living crisis.

While the new proposal to pay childcare costs upfront, rather than in arrears, is a welcome reform, the simultaneous expansion of conditionality and sanctions to a wider group of UC claimants and the removal of the couple's Administrative Earning Threshold (AET)⁴², along with the introduction of sanctions and conditionality for non-working partners, can have adverse effects on parents, particularly mothers of young children aged 1-2⁴³. The impact of these conditionality changes and sanctions will be even worse on single parents, 84% of whom are women.⁴⁴

One of the critical areas where the benefit system faces challenges is its failure to recognise the differences between the childcare systems in Wales and England. Benefit conditionality and sanctions are problematic in the Welsh context due to the lack of childcare support for a certain age group, with no plans to expand coverage.

Expansion of childcare provision in England: “The English Offer”

Alongside the expansion of conditionality and the introduction of new sanctions in the benefit system, the Chancellor also revealed plans to extend the 30 hours funded childcare offer to children as young as 9 months old by September 2025 in England.⁴⁵ This change in the system will be introduced in a phased manner, commencing in April 2024 when eligible two-year-olds will initially receive 15 hours of funded childcare per week. Then, by September 2024, eligible children aged between nine months and two years will be entitled to 15 hours of funded childcare. Finally, in September 2025, eligible children aged between nine months and three years will gain access to 30 hours of funded childcare.⁴⁶

The proposed plan has ignited extensive discussions and debates among the public and within the devolved nations. Firstly, it's important to note that the plan is set to be implemented after the General Election, which implies that a new government could potentially make alterations or choose not to proceed with the proposed changes, which adds an element of uncertainty to the future of the plan. However, the implementation of

⁴¹ Wales Women's Budget Group (2023), [Far From a Vital Safety Net: Benefit Conditionality, Sanctions and Women in Wales](#).

⁴² The Administrative Earnings Threshold (AET) is the lower threshold for income level. It is set in regulations at an individual or household level. The AET ensures that claimants with no income or on a very low income receive the most intensive support.

⁴³ Wales Women's Budget Group (2023), [Far From a Vital Safety Net: Benefit Conditionality, Sanctions and Women in Wales](#).

⁴⁴ Ibid.

⁴⁵ [What is the plan for 30 hours of free childcare and how will it work?](#), BBC News, 16 March 2023,

⁴⁶ Ibid.

benefit conditionality and sanctions already commenced in October 2023, without adequate childcare support.

Secondly, there are substantial concerns regarding the feasibility of these plans. Budgetary considerations are a significant point of contention, as expanding childcare support to younger children requires substantial financial commitments.⁴⁷ Additionally, there are worries about the availability of sufficient childcare spaces and the shortage of qualified staff to meet the increased demand.⁴⁸

While the feasibility of the plan was questioned at the policy making level, the “English Offer” ignited significant enthusiasm among parents. However, it also led to disappointment among Welsh families, as the Welsh Government did not make any commitments similar to the “English Offer”.⁴⁹ Instead, they emphasised that the Chancellor's plan was not feasible and highlighted that Wales had already been working on expanding childcare under the Cooperation Agreement.⁵⁰

2.4. To sum up...

In summary, the issue of childcare in Wales remains a significant challenge with far-reaching implications.

- Affordability and accessibility remain out of reach for many families, with particular severity felt by low-income households, single parents, those with disabled children or children with Additional Learning Needs (ALN), parents working atypical hours, and families residing in rural areas.
- The limitations of funded childcare support in Wales are evident, with the absence of support for children under the age of 2 representing a considerable hurdle.
- The existing support for 2-year-olds, Flying Start, falls short in providing comprehensive support to parents outside designated areas and those in employment due to its limited provision.
- The 30 Hours Funded Childcare Offer for children aged 3-4 also excludes unemployed, economically inactive, and low-income families.

⁴⁷ [Free childcare: Is Jeremy Hunt's Budget promise feasible?](#) BBC News, 18 March 2023.

⁴⁸ Ibid.

⁴⁹ Despite the “English Offer” still having a long path ahead and lingering questions about its feasibility, Welsh families have begun to call on the Welsh Government to follow England's lead. A petition initiated by a Welsh parent, urging the Welsh Government to provide equivalent financial support for childcare as is available in England, garnered support from over ten thousand people. (Offer Welsh working parents the same financial support for childcare as England. <https://petitions.senedd.wales/petitions/245522>) In our survey, a significant number of parents also referred to the “English Offer” and expressed a desire for a similar expansion of childcare support in Wales. These statements say that parents are eager to witness advancements in the accessibility of affordable childcare and are prepared to embrace suitable offers when made available.

⁵⁰ [Drakeford accused of refusing to extend free childcare in Wales](#), BBC News, 21 March 2023.

- Childcare support for individuals in further education, training, and skill courses is notably lacking.
- The misalignment of UK-wide benefit systems with service provision in Wales further compounds the challenges faced by families seeking accessible and affordable childcare.

Addressing these multifaceted issues is crucial for developing childcare policies and support programmes which will ensure equitable access to quality childcare for all families in Wales.

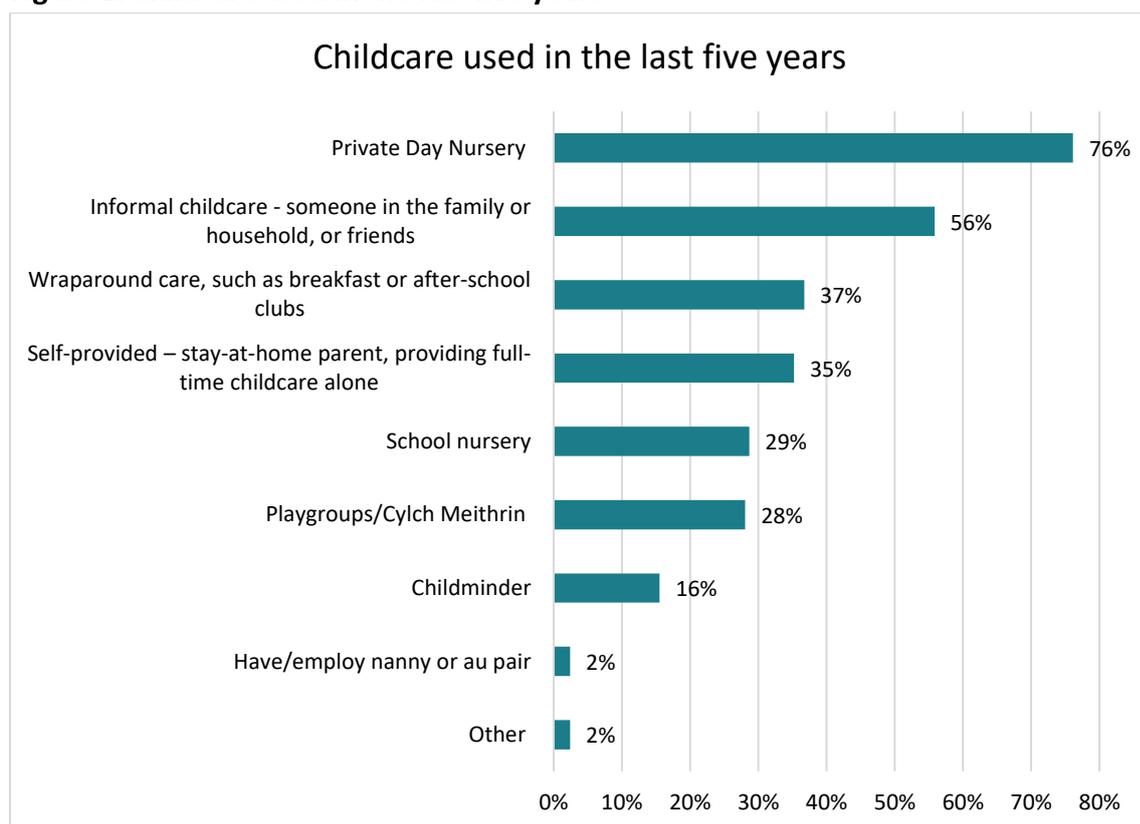
3. Access to Childcare Provision

When examining the childcare situation in Wales, it's crucial to evaluate the accessibility and affordability of childcare services for families. These factors greatly influence parents' decision-making and job opportunities, as well as gender equality and children's access to high-quality early education.

Among the 335 survey respondents, 91% mentioned that they used formal childcare in the last five years, while 9% reported that they did not utilise formal childcare.

The majority of the participants who joined our survey said that they used private day nurseries (76%) and informal childcare provided by a family member or a friend (56%) in the last five years.⁵¹

Figure 1: Childcare used in the last five years



The figures clearly indicate that parents use a blend of childcare options that suit their individual needs and accessibility. As we explore further in this report, the selection of

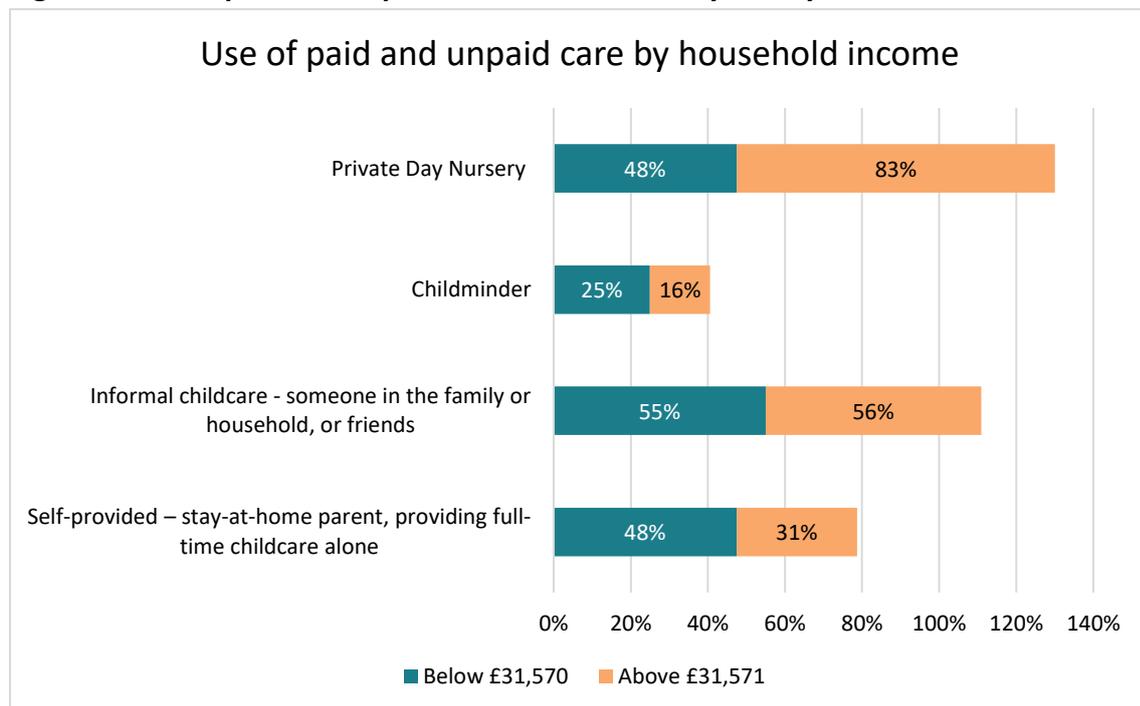
⁵¹ It is important to note that the survey participants did not specify the frequency of their use of private day nurseries. Therefore, the high percentage of private day nursery usage does not necessarily indicate full-time enrolment, but rather a range of use from part-time to full-time.

childcare type is highly dependent upon the specific circumstances of each family or parent, primarily driven by their financial and employment situations.

One notable observation from these statistics is the relatively limited utilisation of childminders among the participants, with only 16%. Furthermore, when we combine the utilisation of self-provided care, accounting for 35%, and informal care, accounting for a substantial 56%, we uncover that unpaid care emerges as the overwhelmingly employed choice for parents, constituting 91% of all childcare arrangements.

An insightful examination of the utilisation of paid and unpaid care in relation to household income reveals a distinct pattern, even though we are unable to make a statistically viable comparison due to sample sizes.⁵² Self-provided childcare shows an upward trajectory as we move down the income scale, indicating a higher reliance on unpaid assistance among lower-income households. Yet, informal care provided by family members and friends is at almost the same level in both income groups. Unsurprisingly, the use of private day nurseries increases within the higher income brackets. Furthermore, there is a noticeable divergence in utilising childminders between these two income levels.

Figure 2: Use of paid and unpaid care in the last five years by household income

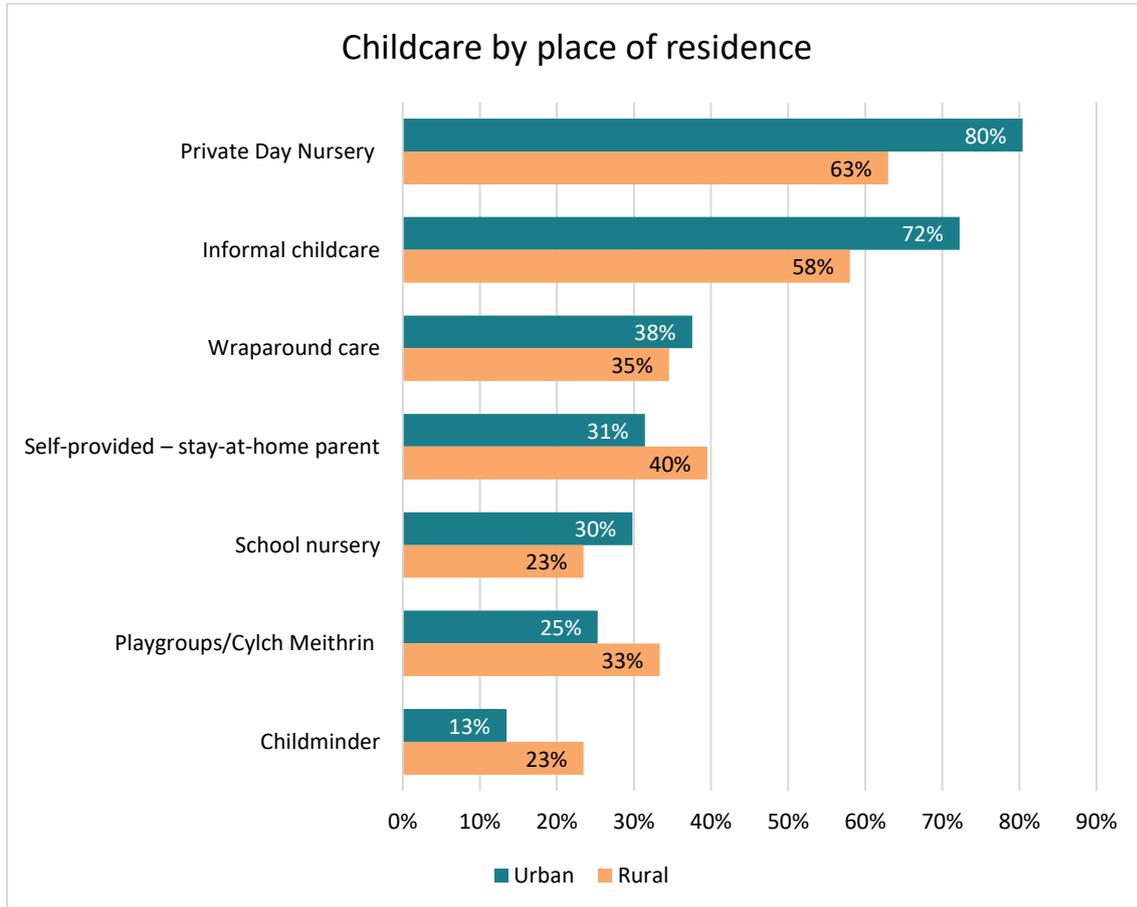


We also examined the childcare preferences of our research participants based on their residential settings, distinguishing between rural and urban areas. The graphic below

⁵² To note, the numbers of participants are not equivalent in the two income groups. There are only 40 participants whose household income marks below £31,570 per annum, while there are 263 participants whose household income exceeds £31,570 per annum.

illustrates that self-provision is more prevalent in rural settings, standing at 40%, as opposed to 31% in urban areas. Additionally, playgroups and childminders were taken up more in rural areas when compared to their urban counterparts.

Figure 3: Childcare used urban vs. rural areas

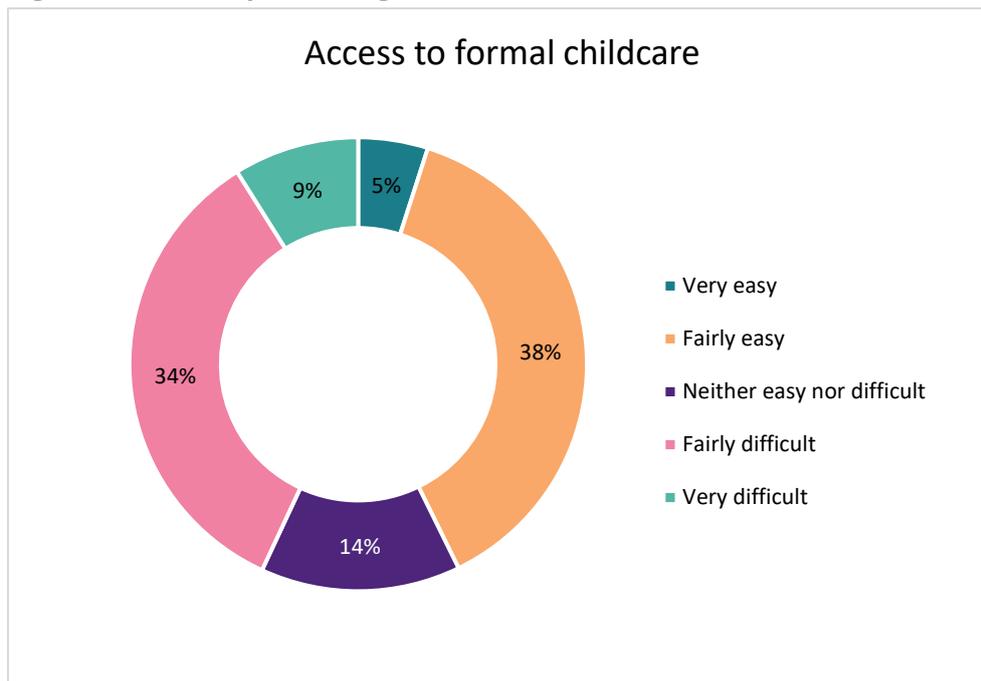


3.1. Access to formal childcare

“The system is designed to deter women from being in the workforce and is a symptom of systemic patriarchal (...)!”

Survey participants who opted for formal childcare are divided nearly equally when it comes to assessing the ease of accessing such services, considering factors like cost, availability of space, and eligibility requirements for the funded childcare offers. As illustrated in the chart below, among the 304 responses, those who found access to childcare either "easy" or "very easy" are on par with those who found it "difficult" or "very difficult," each accounting for 43% of the total.

Figure 4: How easy accessing to formal childcare

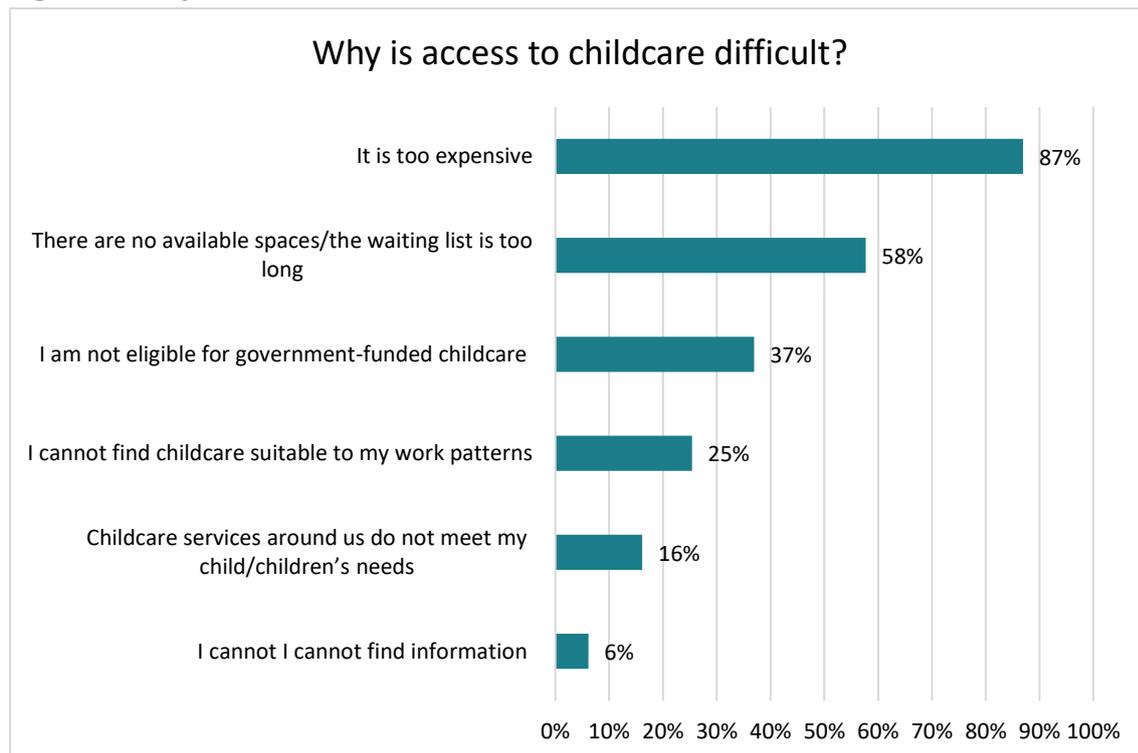


When we look at the breakdowns in terms of place of residence, income and disability, we observe some slight differences in finding ease to access formal childcare.

- In terms of place of residence, we did not observe a significant difference as 43% of those living in urban areas find access to formal childcare either difficult or very difficult, compared to 44% of the rural locales.
- When we examine the disparity in income levels, we observe that 50% of respondents with annual household incomes below £31,570, who had utilised formal childcare, reported finding access to be "difficult" or "very difficult," in contrast to 42% of respondents whose household incomes exceeded £31,571.
- While our sample size does not allow for an extensive examination of the experiences of parents caring for disabled children or children with health conditions/special needs, we do note a notable distinction in their responses compared to those of parents who are not parents/guardians for disabled children. Among the parents of disabled children and children with health conditions/special needs, 54% (17 out of 32) found accessing childcare to be challenging. In contrast, this was the case for 42% (112 out of 269) of parents who are *not* parents/guardians of disabled children.

Among parents utilising formal childcare who found difficulties in accessing it, 87% (113 out of 130) voiced concerns about the prohibitive cost of childcare, while 58% (75 out of 130) cited insufficient space to meet their childcare requirements, as illustrated in the graphic below.

Figure 5: Why is access to childcare difficult?



Some parents also raised their concerns about childcare not fitting their needs, and they found it complicated:

"...difficult to find a nursery that would only take our child on for one day a week and only during term time."

"Childminder could not fit the youngest child in due to being at her numbers of under 5s. So had to use another childminder in another village. This childminder decided to reduce hours, older child's childminder was still full so had to travel to another village to a childminder that was more expensive. (...) Rural area means limited choice for childcare. The oldest child's childminder is fantastic but let down as no space for the youngest who was then let down by the second childminder changing opening days. So had to use a more expensive childminder further away."

"There is only childcare for my disabled child available for 6 days to cover 6 weeks of summer holidays. Provision for disabled children is next to non-existent."

"Spaces are very limited so you can end up having to enrol your child in a childcare setting which isn't your preferred choice."

The absence of childcare during unstructured working hours and difficulty in fitting childcare in working hours have also been identified as a challenge for certain working parents.

“I work shifts and weekends and childcare doesn’t exist for this. What are shift workers supposed to do? I was told to pay for 3 set days every week to cover the pattern even though I’d only need it once per week. So, I’d be paying for x2 children x3 days a week each and I only need x2 children once. That’s almost £1000 more than I’m paid and can afford.”

“...huge need for more flexible private daycare settings that work around shift work and unsociable hours, especially when no family to help.”

“Childcare drop off and pick up times are not early or late enough for early work start and late work finish times.”

“Hours are often too short to fit around full-time work if you have to travel.”

“I find the 30 hours system very confusing and, due to my work hours, I cannot place my child in a school nursery so will lose that portion of funding by leaving him in private nursery until reception age. My catchment primary does not have a nursery, so I don't want to move my son twice in a year.”

A participant who has irregular working hours and struggles to find suitable childcare, yet actively seeks out alternative solutions, expressed her distinctive challenges as such:

“I work shifts, over weekends & nights. Finding childcare is impossible since Brexit as there are no au pair visas. Au pairs were a reasonably priced, mutually beneficial arrangement.”

A mother with children aged 0-12 months and 5-6 years old has mentioned that she is unable to access childcare as a parent who is in education. The family are not eligible for the current funded childcare support due to the age of the children.

“I and other mums I know have been adversely impacted by the fact that funded childcare is not available for mums in full-time education. This negatively affected our ability to access training to develop our careers or re-enter the workforce after a long break. I would like to see funded childcare available for women who are in training or education to make this more accessible for women.”

Another participant emphasised the absence of support for mothers who had initially stepped away from the labour market but later chose to re-enter it.

“I (had) decided to be a stay-at-home Mum but when I decided to return to work I was very challenged by how to manage childcare/confidence in return to work and could have benefited from any kind of support. I did look for this support but found none was available.”

3.2. Use of informal childcare

Among our survey participants, a substantial 64% (214 out of 334) emphasised that they used *regular* informal childcare in the past five years. Notably, 97% of these parents indicated that this informal care was primarily offered by family members, including grandparents, siblings, or cousins. Only 14% mentioned receiving informal care support from friends.

Informal care is an integral part of childcare; yet, the views on informal care vary among participants, as the table below shows.

Table 3: View on informal childcare

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
Informal childcare meets my needs	30	52	46	56	29	213
	38%		22%	40%		
Informal childcare is reliable for me	24	66	35	58	31	214
	42%		16%	42%		
Informal childcare is the only option for me due to childcare costs and difficulties in accessing childcare	11	45	49	46	62	213
	26%		23%	51%		

Among the participants who relied on regular informal childcare over the past five years, 40% reported that it meets their needs, while 42% found it to be reliable. In contrast, nearly equal proportions of participants expressed dissatisfaction, with 38% stating that informal childcare falls short of their needs, and 42% finding it unreliable.

However, the dynamics shift when examining the relation between the cost and accessibility of childcare and the utilisation of informal childcare. Just over half of the participants (51%) either expressed agreement or strong agreement with the statement that informal childcare becomes their sole option because of the cost and accessibility constraints associated with formal childcare. In contrast, only 26% of the participants disagreed with this correlation.

A significant number of participants underlined their heavy reliance on informal care to facilitate their ability to work:

“Without the support of a family to look after it would not have been possible for me to return to work.”

“We have to use my 69- and 73-year-old parents for childcare two days a week due to the cost of private day nursery. I’ve also had to condense my hours to take one day a week “off” - meaning four long and near impossible days of work around childcare drop offs and pick-ups.”

“My son does 2 days in private nursery and 3 days with his grandparents as we couldn't afford more than 2 days. I'm unaware of what help we get for this. Information seems to be limited/ made uneasy to find.”

Furthermore, it is also crucial to recognise that informal care may not always fully meet children's developmental needs, even though it undoubtedly carries immense value in the lives of children, offering them a unique bond with family members. This generated concerns among parents regarding the fulfilment of their children's developmental needs.

“Childcare is just so expensive. I have family childcare for 3 days a week and if I was to put my child in childcare for the other 2, I would be working those days for £2 an hour. Therefore, I have reduced my working hours so I can spend this time with my child but that’s not an option for everyone as it is still a cost I’m bearing by earning less if not paying out. Also, my child is now not going to a formal childcare setting which could impact social or educational skills further down the line.”

It is important to recognise that informal care, which is invaluable for many families, often goes unpaid and unacknowledged, potentially creating challenges from the caregiver's perspective. The unpaid nature of informal childcare can lead to a form of time poverty, where caregivers might face limitations in pursuing their own interests, hobbies, or career opportunities.

Participants also conveyed that the informal caregivers they rely on often had to adjust their working conditions to accommodate the childcare needs of their relatives.

“My mum has reduced her hours to part-time in order to care for my son two days a week as we simply cannot afford childcare for the whole week.”

On the other side of the coin, parents who do not access formal childcare and look after their children themselves encounter their own set of challenges. The absence of informal care can also pose a problem, as informal care serves as a crucial support network for many parents, offering a sense of security and assistance:

“It has been a very lonely experience for me as a stay-at-home mum. More hours of community-based affordable childcare would be amazing.”

“Just to flag that it is even harder for those of us who don't have any family or friends we can ask to provide informal childcare. We don't have any grandparents living anywhere nearby and the only family member that lives nearby works full-time and so can't provide childcare. It is incredibly hard without any informal childcare - the majority of other parents I know have had support from their own parents/ child's grandparents and have managed to have a night without the baby by now (mine is 2 years old) - their parents have not just provided childcare but advice, support, practical help like help with cleaning their houses, cooking meals etc... the informal support and childcare that new parents receive is so important and it is incredibly hard when you have no support network.”

“My husband and I had children later in life due to fertility struggles. We have no family or friends to help us. We couldn't get any support because we didn't live in a Flying Start area yet I know people who had a brilliant support network accessing the Flying Start services because of where they lived. Why were they deemed to be more in need than me? My mental health has definitely suffered. I also see some groups with the aim of supporting young parents - but they often have a support network. What about older parents who don't have that support network and are often having to juggle childcare with caring for elderly and ill parents?”

3.3. Quality of childcare

In the survey, we asked participants their opinions about the quality of childcare they can access and afford. Among the respondents, 46% expressed satisfaction with the quality of available childcare services, while 28% stated their dissatisfaction. Meanwhile, 26% of participants reported that they did not hold a strong opinion on this matter.

Table 4: Quality of childcare

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
I am not happy with the quality of the childcare I can access/afford	56	97	85	50	44	332
	46%		26%	28%		

Conversely, while most parents are satisfied with the quality of childcare services, a substantial portion also acknowledges the complexities they face when utilising various childcare settings for both themselves and their children. A notable 69% of parents voiced their difficulties in managing multiple childcare arrangements. Furthermore, 52% of parents

reported that their children also encounter difficulties when it comes to adapting to different childcare settings.

Table 5: Using multiple settings

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
Juggling among different settings of childcare is a challenge for me	10	29	65	99	131	334
	12%		19%	69%		
Using different settings for childcare is not easy for my child	12	37	109	79	95	332
	15%		33%	52%		

Parents expressed their concerns about the impact of using various childcare settings on their children in their commentary:

“It has been difficult for my child to use different settings as he was too young to go to school and then go to wraparound care.”

“We moved my son out of a private nursery that he loved to a school nursery purely because the 30 hours scheme didn't allow us to keep him in the private nursery. This was heart-breaking as he was just at the point where he'd developed "best friends" that he had to leave and had been doing really well in that setting. The research doesn't support education for early years, and forces children to attend more formal settings in Schools at too young an age.”

“We are very lucky to have the chance to pick him up and put him to nursery ourselves as we work from home but as the nursery does not support wraparound, we are forced to wait every day 30m outside of the nursery for him to start his second part of the day. He then eats alone as all other children have already had their lunch. (...) In the school nursery, he found it hard to form real bonds as it's only 2.5 hours.”

Some participants, however, raised their concerns about the general quality of childcare, and emphasised that wellbeing and developmental needs of children are not at the centre of the childcare system:

“I find the quality of care in nurseries dips when children start the 30 hours. Suddenly you are simply filling a place and the staff seem less interested in the children.”

“Please don’t see childcare as the only option! Look at children’s well-being as the ultimate goal; e.g. is being switched between multiple care settings good for their emotional stability in fostering secure attachment? Are small children best in care or do we need better options to enable parents to stay home longer with them? What childcare policies would best support breastfeeding mothers? Etc etc. please don’t push free childcare as the only or the best solution for families. Even with the excellent providers we have used, it is not without issues.”

“A lot of the questions focus on the provision however in our case more than that was the quality, the way children were seen and the respect children were provided to as most of the setting near us were very traditional settings. Where children were seen as empty vessels that needed to be taught and told what to do. They are not seen as human beings that need to be seen accordingly to their needs, their desires and to get to know them instead of generating general assumptions about what they want or what they need.”

3.4. To sum up...

The childcare landscape for the participants is marked by diverse choices and considerations.

- Private day nurseries are a popular option, while childminders are utilised to a lesser extent.
- The prevalence of informal care is notably high, often driven by the overwhelming cost of formal childcare.
- Self-provision takes precedence in rural settings, with playgroups and childminders being favoured choices compared to urban areas.
- The ease of accessing formal childcare is closely tied to individual and household circumstances, encompassing factors such as household income, children's ages, family size, and the specific health conditions and needs of the children.
- The participants are happy with the quality of childcare but they are concerned about using different settings.

These findings underline the nuanced and multifaceted nature of childcare decision-making for parents.

4. The Cost of Childcare

The cost of childcare stands as the most formidable obstacle for many parents today, which is extensively voiced by the survey participants. It looms as a financial burden that weighs heavily on families, often eclipsing the price of mortgages or rent, especially in the midst of the rising cost of living. The high cost of childcare, particularly for those with multiple children, single parents, and parents who do not have informal care support, has become an impediment to pursuing their careers and paid work and can lead to difficult choices, including reduced working hours or even opting out of the workforce entirely.

As evidenced by the chart provided below, 44% of the survey participants who pay for childcare (145 out of 333) bear the weight of monthly childcare costs ranging from £500 to £1099. When we only count participants who pay for childcare, we see that 47% of the participants (145 out of 307) have a monthly childcare cost ranging from £500 to £1099.

Figure 6: Monthly childcare cost of survey respondents



Unsurprisingly, 92% (306 out of 334) of participants agreed that childcare costs are too high relative to their income levels. Furthermore, 53% (178 out of 334) of respondents have highlighted that paid employment becomes financially impractical once childcare expenses are considered.

Table 6: Childcare cost and income

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
Childcare costs are too high compared to my income	11	5	12	74	232	334
	5%		4%	92%		
After paying for childcare, it doesn't make financial sense for me to go to work	14	85	57	81	97	334
	30%		17%	53%		

The figures clearly demonstrate that even though the majority of our sample group comprises households with above-average income levels, the cost of childcare is still a significant financial burden. It is evident that for many families, the high cost of childcare is not only difficult to bear but also unsustainable from a financial perspective.

The cost of childcare also emerged as a pervasive and significant concern throughout the commentary, as we showcase below:

“It's causing us endless financial stress, forced us to work compressed hours to pay for everything which is actually really difficult due to long hours daily, stopped us from having more children because life is too expensive and we keep delaying this decision until it might be too late due to my age. It's awful and to be getting no help at all is a real kick in the teeth considering the amount of tax we're both paying.”

“Childcare is shockingly expensive in Barry, Vale of Glamorgan where I live and as middle-income earners we get zero help apart from 2k tax-free childcare (drop in the ocean) and even part of child benefit needs to be repaid. It's scandalous, childcare doesn't cost half as much anywhere else in Europe!”

4.1. Impact of childcare cost on parents

“It's a mess. Yet again women are the ones that are most affected by this issue - absolutely an equality issue! Childcare is the biggest stress factor as a parent who works - it is so expensive, I lost out significantly financially when I returned to work and only did so because working helped to retain mental health for me. Parents on low incomes, single parents or those on benefits have more financial help with childcare when they are not working as much - those that work are severely punished financially. Either pay parents (and

let's be honest, it's usually women) a salary to stay at home with their children until they are 3 when the 30 hours funding kicks in, or pay the childcare when maternity ends!!! It makes NO SENSE."

Childcare expenses can have a significant impact on a family's financial situation and can greatly affect the ability of parents to work, with women often facing the biggest burden. One of the male participants highlighted the gendered impact of childcare cost in his response.

"I have answered as the (male) parent who earns more money. These answers would be completely different from my wife who earns less and has therefore 1. Had more worries about childcare costs. 2. Would have a very different feel as to childcare affordability given her level of income."

We asked in the survey about the impact of childcare costs on participants' family finances over the course of their last five years of experience. Of the 300 respondents who had sustained childcare costs, 43% (130 individuals) revealed that they encountered difficulties covering other critical expenses once they had paid for childcare. Furthermore, a significant 70% (221 out of 314) stated that they had no surplus income or savings left after allocating funds for childcare.

Figure 7: Impact of childcare cost on family finances

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
I haven't been able to pay other essential costs after paying for childcare	41	79	50	91	39	300
	40%		17%	43%		
I don't/ didn't have any disposal income/savings due to childcare costs	14	45	34	114	107	314
	19%		11%	70%		

While some parents may have relatively comfortable incomes and the ability to afford private childcare, they often find themselves with minimal disposable income, as highlighted by one participant who shared their experience:

"I am lucky enough to have enough income to use a private nursery, but I don't have any disposable income after paying for childcare and other bills."

"Means testing is not right/appropriate. I'd be considered a higher earning but the cost of full time childcare nearly bankrupted us and was very

challenging. We all love and have commitments based on our salaries so disposable income/money left over to pay for childcare is the same.”

“Funding towards childcare needs to start before 3, it has been a difficult couple of years paying £1200 per month, leaving little spare money after paying all other bills.”

Moreover, it is noteworthy that a significant 67% of the participants (221 out of 332), express agreement or strong agreement with the statement that *“I tend to perceive childcare costs as a reason not to have (more) children”*. This finding marks the substantial influence of childcare costs on individuals' family planning decisions, shedding light on the considerable weight of childcare costs on family finances.

Table 8: Impact of childcare cost on having another child

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
I tend to view childcare costs as a reason not to have (more) children	20	29	62	92	129	332
	15%		19%	67%		

Participants expressed their viewpoints on this matter, offering additional insights and commentary:

“I’m gutted that Wales are not going to be offered the subsidised childcare from 9 months of age. This will push back when or if I can have a second child for financial reasons. This will mean me having my next child as an older mum, with higher risks of pregnancy complications, Down syndrome etc which would all cost the government more money than just helping out with childcare now so I don’t have to wait until my first born is in school. I know many friends in the same situation.”

“In two years, our daily nursery charge has increased by 25% yet my wages have remained the same. This has put a significant burden on our family. We would love to grow our family, yet cannot afford to do so. Even though we both work full time.”

“We are seriously having to put off having another child due to childcare costs. Both my husband & I work full time, our nursery fees have gone up 4 times in the 12 months. We are fortunate that our parents can have our daughter once a week but otherwise I don’t know how we would afford 5 days of nursery fees.”

“I am not planning for another child purely due to extreme childcare costs.”

“We haven't been able to save any money as private nursery costs us £700 a month for 3 days a week. We have reasonably well paid jobs but we've had to be really careful with money and I've been dipping into my savings since my daughter was born 2 years ago. It's not fair and makes me so angry. I really don't see how we could afford having another child.”

“Childcare costs were double my mortgage and prevented me from having a second child.”

“The 30 hrs offer being lowered to age 2 would help me work more hours and be able to have another child sooner.”

Participants also echoed the challenges faced by single parents in terms of accessing and the cost of childcare:

“Single parents face particular challenges which do not seem to feature large in the considerations of local or national government. For example, despite their being a single person's allowance for council tax, there is little or no other support available for single parents with single income households. The cost-of-living crisis has put huge pressure on single parents as they struggle to pay the bills and cannot afford activities, clubs, childcare etc. There is also a huge pressure to earn more and work longer hours, adding to the problem of childcare for children of school age and below.”

Parents with multiple children have been particularly vocal in expressing their concerns about the cost of childcare and the pressing need for additional support:

“Private nursery is not really giving 17.5 on the 30h offer. They are just deducting the return from the invoice but not according to actual hours. This means I'm paying £430 a month just for my eldest after the 30h. (...) With my almost 2-year-old in nursery as well it comes to about £2000 a month for us. I earn well so it still makes sense for me to work, but most people are not as lucky.”

“I have children of varying ages with different needs so a one size fits all approach doesn't work for families of multiple children. Also, the cost of childcare has rendered it impossible for me to return to work.”

Several participants who require wraparound care for their school age children also shared their concerns regarding the costs and inconvenience associated with such care settings:

“Struggling to find childminders for wrap around care for my daughter starting part-time nursery in January. Wrap around for private nursery from school nursery in my area has been stopped. There is no free breakfast club provision in my son's school so we pay £11 per morning and after school club places are limited so we rely on different family members and friends to pick him up from school if we can't get a place. I often have to rush out of work to collect him.”

“A typical childcare setting is no longer a space my 8-year-old wishes to attend, we therefore during school holidays rely on sports clubs for childcare, these come with their own challenges such as offering less childcare hours than a typical 7.5hrs working day and not being able to use childcare voucher or similar to pay for these settings.”

Lack of flexible working allowing parents to adjust their working hours according to school hours puts extra pressure on parents' shoulders:

“My daughter is going to be full time I feel it's unfair on people to pay for wraparound care because workplaces don't like school hour shift so I'm constantly having to fork out £10 a day/£50 a week so at least £200 a month on childcare in September.”

To manage the financial challenges posed by the cost of childcare, some participants considered moving somewhere else as a viable option.

“Our situation next year personally will look very different, we have a 5-month-old son and when I return to work in January our childcare costs will rise to £1500 per month, this will utilise all our surplus income which is already being eaten into by rising costs of living. If mortgage rates do not decrease by the time our fixed rate expires it's likely we will have to move home and might lose access to the great childcare we use currently as we would need to move to a poorer area to afford a home there as well as pay for childcare costs full time for a 10-month-old and wraparound for a 4-year-old.”

“Both of us are highly educated with degrees and have well paid jobs. Our combine income is circa 100k. We have very little bills but service a substantial mortgage. Childcare costs could put us out of our house even though we have well paid jobs, no debt etc.”

4.2. Impact of childcare cost on employment

The cost of childcare significantly affects parents' employment and careers, as revealed by our survey. A substantial 75% of the respondents (247 out of 328), agreed or strongly agreed that a lack of comprehensively funded childcare had adverse consequences for their professional lives. It's worth noting that among these 247 respondents, 11 were men, accounting for 58% of the male participants who reported experiencing a negative effect on their work and career due to the lack of funded childcare.

A notable 85% of the respondents (273 out of 321) expressed that the need for childcare had an impact on their ability to accept new work or additional hours at work. It is worth noting that among those 273 respondents, 13 were men, constituting 68% of the male participants.

Table 9: Impact of childcare on work

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
Lack of funded childcare had a negative impact on my work or career	14	36	31	106	141	328
	15%		9%	75%		
Need for childcare has had an impact on my ability to accept new work or additional hours	9	17	22	111	162	321
	8%		7%	85%		
I would have returned to work or increased my hours quicker if more funded childcare had been available	6	21	14	27	79	147
	18%		10%	72%		

We also inquired about parents' experiences regarding their return to work after having their child. The results are summarised below.⁵³

⁵³ These questions were only responded if it was applicable to the situation of the survey participants.

Table 10: Experiences of parents returning to work and at work

	Yes, this is my experience	No, this is not my experience	Total
I couldn't find childcare that met my work needs	119	181	300
	40%	60%	
I couldn't find work that was flexible to balance alongside my childcare responsibilities	112	183	295
	38%	62%	
I needed to reduce my working hours due to a lack of childcare	209	102	311
	67%	33%	
I couldn't return to work due to the barriers/cost of childcare	70	229	299
	23%	77%	
I didn't have any problem in returning to work	148	142	290
	51%	49%	
I didn't return to work, but looked after my child(ren)	50	222	272
	18%	82%	

- Out of 300 parents surveyed, 40% (119 individuals) expressed that they couldn't find childcare that met their work needs. Among these respondents, four were male. This means that 2 in five parents had difficulties in finding childcare suitable to their work needs.
- Among parents who work in paid employment, 38% indicated their struggle to secure flexible employment that could accommodate their childcare requirements. Notably, out of the 112 respondents facing this challenge, five were men. This reveals that nearly 2 in 5 parents have encountered difficulties in locating flexible job opportunities that align with their childcare needs.
- 67% of parents reported the necessity to reduce their working hours due to a lack of childcare. Among the 209 respondents who made this adjustment, ten were men. This figure shows that nearly 7 in 10 parents had to cut back on their working hours because of their childcare requirements.
- 23% (70 out of 299) of respondents reported they couldn't return to work due to the barriers/cost of childcare. Among these respondents, three were men. Furthermore, nearly half, 49% (142 out of 290) reported facing challenges in their return to work, with eleven of these 142 respondents being men. This means that close to one in two parents encountered difficulties when returning to work.
- 18% of the respondents (50 out of 272) expressed that they did not return to work to look after their children but looked after their children. Among these 50 respondents, two were men. This indicates that 2 in 10 parents chose not to return to work and dedicated their time to childcare.

These figures demonstrate that a significant number of parents encounter challenges in finding childcare options that align with their work requirements. Furthermore, they often find themselves needing to modify their work patterns to accommodate their childcare needs, all while struggling to secure flexible employment opportunities.

In their commentary, participants overwhelmingly articulated the far-reaching consequences of childcare costs on parents' employment and work. The discussion below reveals the diverse range of experiences among participants concerning the influence of childcare costs on their careers.

“Childcare costs at their highest (day nursery) were £500 whilst I had to reduce my working hours from FT [full-time] to PT [part-time] as the FT nursery fees would have been more than my take home pay.”

“The ability to financially support myself and my child has been difficult due to being unable to work full-time hours because of the cost of childcare being £69 a day.”

“It seems to be such a large gap of support before the child turns 3. It makes returning to work such a difficult choice. I went back to work to a promotion which was great, but I had to drop my days to 4 days a week to juggle childcare. So now I do essentially 2 jobs and pay for childcare and look after my child one day a week, and still only just about afford it.”

Numerous participants, spanning various income brackets, found themselves compelled to make the difficult choice of not returning to full-time work.

“I went from working full time all of my working life to working 2, and then 3 days a week. One of the reasons for this was that, although I do make a little bit of money after paying for private nursery, it's not worth it enough for us as a family and I might as well stay home and look after my child myself for a few days a week.”

“I was on a good (>£40K salary) before having children. I returned to work part time and my employer contributes half of my childcare. If they didn't it wouldn't have made financial sense for me to return to work and one or both of my husband and I would have had to stop working.”

“Childcare is not affordable even from a higher than average income household. Both myself and my husband have had to reduce our hours to help cover childcare and reduce childcare costs. Childcare is unaffordable for everyone not just poorer incomes. Childcare directly affects women's careers

disproportionately as they are the ones who've had to take a career break as private childcare is unaffordable."

"Putting my 3yo daughter in nursery costs £1400/month. The childcare offer is £350/month. These sums do not add up. I have 2 children in nursery so that is £2800/month. My salary is £3000/month - that is a £50k salary and not being worth going to work. You either want people in work or you do not. But this system is unfair and unfunded."

"I did go back to work but made the decision to work part time because of the cost of childcare."

"The cost of childcare meant I had to condense my hours etc to make it viable to return to work. This decision wasn't based on my family needs purely cost it but us under a huge amount of strain and left both parents stretched. I feel the cost of childcare for under 3s severely effects the ability for women to return to the workplace and keep progressing in career wise."

"I have had to reduce my hours to be able to have some semblance of work life alongside home life. My child only goes to nursery twice a week, yet childcare costs more than my mortgage."

"I stopped working when I had 2 children due to childcare costs and didn't return to work until my youngest was eligible for the 30 free hours at 3. This obviously had an impact on my career as I was out of the workplace for 3 years, it would be much more helpful to have partial funding from 1 rather than all the funding at 3."

Several participants underlined the significance of a skilled workforce's withdrawal from the labour market, a consequence of the burdensome childcare costs:

"Despite having a £50k job, it doesn't make financial sense for me to go back to work full time after maternity ends because over half my pay would go on childcare. So I'll work part-time until he's 5. Seems a total waste of all the training I've done."

"I'm currently on maternity leave, when I return our childcare costs will be around £1400 per month. That is all my wages. We will have to live off my husband's salary. I'm seriously debating whether or not to go back to work. I'm a professional, social worker, and have worked hard all my career. I'll be very sad if I can't go back due to childcare costs."

"Lack of affordable childcare meant I had to quit work, cutting our family income, my financial independence and hugely impacting my mental health."

I used family help but that meant long drives, working hard in a short time frame and making me really tired when it came to the second job of caring for my children once paid work was done.”

In a manner reminiscent of the impact on the skilled workforce's departure from the labour market, NHS workers highlighted the repercussions of childcare costs on essential workers and public services:

“We both work for the NHS so the cost and lack of childcare is indirectly impacting the healthcare service, we are having to work part-time.”

“My informal childcare will only last as long as the grandparent is fit enough to look after my daughter (she’s in her 70s). I work in a skilled job within the NHS. I will have to reduce my hours further without further support.”

A noteworthy comment came from a nursery nurse who, despite her professional background, grappled with her own childcare challenges:

“I work in a minimum paid job, as a nursery nurse in a day nursery. I am not allowed to bring my child to work with me due to my nursery’s ‘policy’. My partner doesn’t earn much more than minimum wage. If I were to pay for childcare for my daughter, it would near enough take my days earnings for that day. We aren’t entitled to any benefit help. I can only work 2 days a week at the moment due to childcare issues which has an effect on us also due to cost-of-living crisis.”

Lack of funded childcare affected participants to pursue their careers and turned down job offers:

“I got a fantastic job offer when my youngest was 3 and qualified for the 30 hours. The waiting list to get into private nursery was 6 months, had lockdown not happened I would have had to turn down the job as they couldn’t wait 6 months for me to get childcare.”

Some participants also pointed out that due to the cost of childcare, they were compelled to return to full-time work, which introduced a distinct set of challenges:

“My childcare costs are higher than my mortgage payments and this is completely unsustainable. I didn't wish to return to my job full-time after having children but had no choice due to childcare requirements.”

“I have to work full time hours over 4 days to balance out the cost of childcare. This means I work 10-hour days and see 6-7 clients a day, whereas

being able to work Monday to Friday would have eased this massively. The cost of nursery and my mortgage is 4/5 of my salary."

Some participants also underlined the lack of support from the employers:

"I can avoid childcare but I would like to work less hours to spend more time with my children for their wellbeing. I feel there I'd very little support for that and employers will let you drop one day but more than that is considered a hassle especially if you are well paid or experienced."

"All that aside it is still a much better situation than before the 30 free hours. They weren't available with my eldest and at the time her and her brother were attending private nursery 4 days a week it was costing in the region of £1,500 a month, more than my husband's take home pay. He only kept working because we worried about him having a gap in his employment history and we thought our children benefited from going to nursery. We only needed 4 days childcare as I changed my hours at work. My employer wouldn't let me reduce my hours so I did 37 hours in 4 days. If I had worked 5th day, we would have had another £400 in childcare costs. It was massively stressful but we had no choice."

The predicament faced by self-employed parents is even more dire. The absence of adequate support for self-employed individuals places them in a challenging situation, impacting not only their career prospects but also their overall health and well-being:

"As self-employed I had no maternity leave with my second child as needed to invest in my business and couldn't afford childcare in the first months. This led to mental health issues. I had to work but my baby was too young for nursery (4 months) so had to take on a nanny to help me - at that point I wasn't earning almost at all."

Given that many individuals are left with minimal income after covering childcare costs, some participants drew an analogy between receiving compensation for childcare and not being dependent on the benefit system:

"Make it PAY to work. Stop making it so that parents are better off living off the government. Make it PAY to work. I currently take home £40-100 a month after childcare!"

"I would genuinely be better off on benefits at this current time - how is this the system we have created and curated."

4.3. Impact of childcare on wellbeing and mental health

In our survey, we inquired with parents about their views on how childcare affects their mental and overall well-being and mental health. 71% of parents (230 out of 323) agreed or strongly agreed that concerns related to childcare had a negative effect on their mental health.

Table 11: Impact of childcare on mental health and wellbeing

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
Worrying about childcare has had a negative impact on my mental health and wellbeing	14	32	47	122	108	323
	14%		15%		71%	

Several participants explicitly highlighted in their comments how the concern about childcare and its associated costs takes a toll on their mental health:

“It is a cost-of-living crisis and the childcare bill every month is really having a negative effect on parents mental health and wellbeing.”

“Currently childcare costs in Wales are extremely expensive when you have a child under 3. (...) Struggling to provide for your child makes for damaging mental health issues for parents and ultimately impacts children. Something needs to be done. It’s ultimately damaging for women and children as a whole.”

“Childcare costs have significantly affected my mental health in a negative way and I’ve never suffered with poor mental health historically. The cost of childcare has made me constantly in debt.”

An NHS worker, who had already reduced her working hours also expressed her worries:

“Rising mortgage costs, bills, commuting costs plus nursery fees is incredibly stressful on top of a stressful job and the next few years worries me.”

The inability to return to paid employment due to childcare also have a mental health impact on parents:⁵⁴

⁵⁴ Inability to return to work also create a double whammy as, to be eligible for *the Offer*, parents need to be in paid employment.

“I was employed and able to access the childcare offer for a few months, when I went on mat leave and my FTC ended, we lost the Offer, I had tried very hard to get a new job but had been unsuccessful. The impact on my mental health was extremely negative.”

We also inquired with parents about whether funded childcare had a positive impact on their overall well-being and provided them with some personal time. Among the 130 participants who had access to funded childcare, a significant portion, comprising 42%, reported not perceiving any apparent positive impact on their time or well-being. Additionally, 24% of respondents expressed indifference toward the influence of funded childcare on these aspects of their lives. These findings suggest that, for a notable proportion of parents, the anticipated benefits of funded childcare in terms of well-being and personal time have not been fully realised.

Table 12: Impact of funded childcare on mental health and wellbeing

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
Funded childcare has helped me to have more time for myself/ improved my mental health	25	29	31	20	25	130
	42%		24%	35%		

4.4. To sum up...

The cost of childcare looms as the most formidable obstacle for many parents, a sentiment strongly echoed by the survey participants. An overwhelming majority find childcare costs highly expensive, and this financial burden is particularly onerous for those with multiple children, single parents, and individuals lacking informal care support. It not only hinders the pursuit of professional careers but can also force difficult choices, such as reducing working hours or opting out of the workforce altogether. Childcare costs lead many parents into challenging financial situations, where affording other essentials becomes a struggle, leaving them without disposable income.

This financial impact is particularly pronounced for women, who often find themselves forced out of employment or compelled to return to work part-time, contributing to a concerning skill gap in the economy. Furthermore, childcare costs have affected parents' ability to accept new work or additional hours, with many, especially women, struggling to find jobs that align with their caring responsibilities. These worries surrounding childcare

have taken a toll on the mental health and wellbeing of parents, with funded childcare programmes proving to be instrumental in enhancing their overall sense of wellbeing. In essence, the cost of childcare reverberates through various facets of parents' lives, presenting complex challenges that resonate deeply with their financial, professional, and emotional well-being.

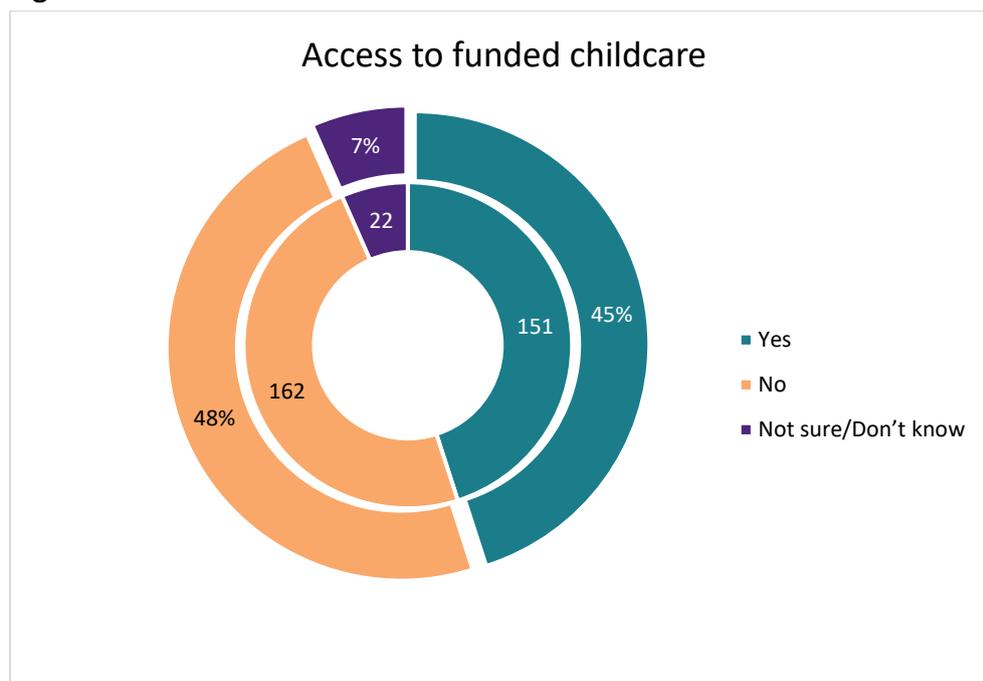
5. Access to Funded Childcare Support in Wales

The childcare support provided by the Welsh Government has had a significant positive impact on the finances and wellbeing of families. However, despite the support, childcare remains unaffordable and inaccessible for many families due to rising costs and certain eligibility criteria. In light of this, we asked parents/guardians about their experiences with accessing formal childcare services in Wales.

5.1. Access to funded childcare

The graphic below shows the access of the parents to funded childcare.⁵⁵ 45% of the participants, equivalent to 151 parents, reported that they accessed funded childcare provided by Welsh Government.⁵⁶

Figure 7: Access to funded childcare



Notably, a small but significant portion, accounting for 7% of parents, are uncertain or unaware of their access to funded childcare provided by the Welsh Government, given the importance of accessing funded childcare support. Additionally, along with the 22 parents who expressed uncertainty about their eligibility, five reported utilising tax-free childcare,

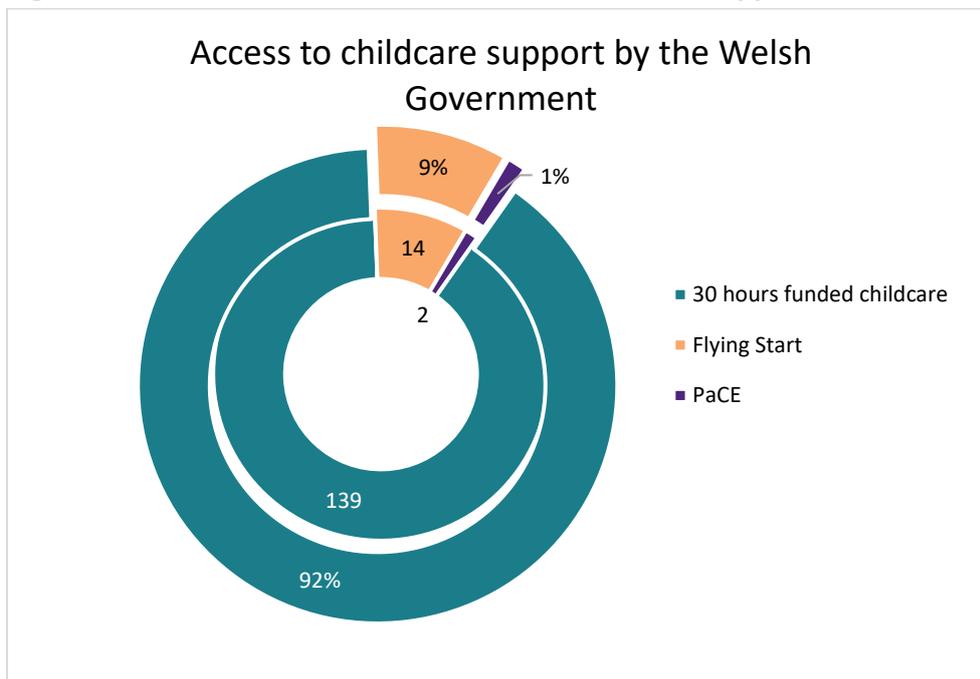
⁵⁵ The results in the graphic include the reports of 52 parents who have children under two years old even though they are not eligible for the Flying Start or the 30-hour Funded Childcare schemes, but might be potentially eligible for PaCE.

⁵⁶ Five parents reported they used tax-free childcare, and one parent mentioned universal credit as a support, but, as these supports are not provided by the Welsh Government, we discounted them in our analysis.

while one mentioned receiving support through universal credit—both of which are provided by the UK Government. Although this represents a relatively low proportion of parents, it highlights the potential for confusion regarding the sources and providers of support programmes among parents.

The chart below illustrates the extent of participation in support programmes the Welsh Government provides. The majority of the participants who utilised funded childcare (92%) reported that they took up the 30 Hours Funded Childcare Offer provided by the Welsh Government.

Figure 8: Access to the Welsh Government childcare support



Among the respondents who did not utilise childcare funded by the Welsh Government (comprising 162 responses), 71% indicated their ineligibility for the Welsh Government support, while 26% expressed uncertainty about their eligibility for funded childcare. A smaller group, comprising 4% (six parents), mentioned facing difficulties with the application process, referring to it as too complex or challenging.

5.2. Impact of funded childcare on families

The table below vividly illustrates the profound effects that funded childcare has had on families. A significant 75% of participants reported a substantial positive impact on their financial situation. Furthermore, 60% of the respondents expressed agreement that funded childcare proved to be a valuable resource in managing the escalating costs of living.

Table 13: Impact of funded childcare on family finance

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
Funded childcare made a substantial positive impact on our finances	7	18	10	52	52	139
	18%		7%	75%		
Funded childcare has helped me keep up with rising costs of living	12	19	20	37	40	128
	24%		16%	60%		

However, participants also raised some concerns and criticisms about what the funded childcare support programmes provide the families with.

Table 14: Limitations of support programmes

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
Having 2.5 hours of childcare a day has not been enough	5	2	8	40	82	137
	5%		6%	89%		
I couldn't access the wraparound support that I needed (transport between settings or other cares like childminder)	16	28	14	26	52	136
	32%		10%	57%		

Some parents raised their concerns that, even if they have support from the Welsh Government, childcare is still costly due to the limited and irregular hours provided in single setting. In particular, *the Offer* still results in a high cost as the distribution of hours is split across two different settings in a single day.

“All of the private nurseries in Cardiff and Penarth, that we have used with the Welsh government-funded 30-hour scheme, despite the promised government discount have still billed us £1,088+ monthly. Due to uneven distribution of hours in different settings (17,5h and 12,5h), private nurseries still charge us for the whole day even though the actual hours spent in the nursery are reduced and only start from 11:30am. One of the nurseries has provided a quote of £70/day with the government-funded hours calculated in the quote against the usual £68/day I have been paying before applying to the governmental childcare scheme. This is extremely sad. How can a discounted rate be higher than the normal one? They simply find a way to

charge you extra: lunch & snacks, tissues, wrap-around service, sunscreen, so in the end there is no discount.”

“We had the 30 hours free childcare we were still charged 13 pounds a week for food and also they told us last minute that our end date was close even though on our government application it says we have 4 weeks left.”

“Private nursery is not really giving 17.5 on the 30h offer. They are just deducting ... from the invoice but not according to actual hours. This means I'm paying £430 a month just for my eldest after the 30h. (...) With my almost 2-year-old in nursery as well it comes to about £2000 a month for us. I earn well so it still makes sense for me to work, but most people are not as lucky.”

5.3. Challenges in accessing funded childcare

In their comments, participants raised criticism about the childcare support in Wales as being overly complicated and inaccessible.

A participant underlined that funded childcare provisions are overly complicated and parents are losing time and money as they are not easily accessible.

“Overall, it feels that childcare options, and help with childcare is extremely complex to navigate, starting with child benefit, vouchers (pre-tax), finding nursery school plus suitable wraparound with space in the shift you are given (morning or afternoon), etc... It all feels like a giant gymkhana, and I know of many people that have simply missed on thousands of pounds on the voucher scheme as they didn't realise it was different to child benefits.

The survey participants consistently highlighted the absence of support for children under 3-years-old and the constraints of the Flying Start programme. Many parents also expressed their concerns about the lack of support during and after maternity leave.

“Maternity pay is very difficult to live on and then you are thrown back into work again struggling to pay for childcare. It is a costly time for parents with very little help from the government, why isn't there support from 1 year onwards?”

“Getting support aged 3 is too late. By that time, we have already paid thousands upon thousands in fees...the cost, the complexity, the lack of flexibility is staggering. I know I would have been able to accept or look for different roles had funding kicked in!”

“Financial support for 1- and 2-year-olds is needed (beyond Flying Start which is only applicable for a minority of people). People want to work but often can't afford to send children to childcare.”

“Funded childcare starting at 3 is not helpful in supporting mothers to get back to work after maternity leave. It needs to be available sooner and not be so complicated in terms of how you can use the hours in different settings.”

“The childcare system as it is currently structured does not support parents returning to work after maternity. If this is an aim of the government, then consideration should be given to bring in funded hours from 9 months old, even if it cannot be provided for the full 30 hrs.

“The main problem with childcare is that at the point you wish to return to work, once your maternity pay ends, that's when you need help and the costs are the highest. Please, please help parents at this stage so that we can end the motherhood penalty!”

“Flying Start 12.5 hrs rollout is shocking, complete postcode lottery based on outdated maps created by Welsh Gov resulted in people living in £500k newbuilt houses getting paid hours for their 2-year-olds and those living in older properties elsewhere getting zero support. 12.5 hrs is not enough in any event.”

The Offer has been criticised from various perspectives, with particular scrutiny directed at both the number of hours provided and the split of hours in different settings. Many parents find the allocated 2.5 hours in a single setting insufficient for their children's needs and unsuitable for their work schedules. Additionally, the availability of wraparound care and transportation between different settings remains a greater concern:

“We value our child attending school 2.5 hours/ day but it is logistically difficult and expensive.”

“The funded childcare system doesn't make sense for 3-year-olds - it needs to be in one sole setting.”

“Without wraparound service splitting the care between different settings makes work life impossible. There is also a lack of synergy between settings. For instance, we pay for our private setting till 1pm, but our child has to leave before then to start nursery school at 12.45 which means we lose a lot of our hours. I then spend a lot of my working week driving across town

transporting my child from one setting to another, which costs fuel and adds to congestion.”

“Splitting funded hours does not help anyone actually working, it has been really challenging. Also, nurseries are allowed to charge a lot on top and cap funded hours used which is not fair. Childcare for under 3-year-olds is extortionate.”

“The 30 hours was also really difficult to manage across two settings in one day, and meant my child suffered with the chaos of going from one setting for breakfast to nursery school then back to private nursery 2.5 hours later. The split benefits no one and we should be able to access the full hours in a single setting.”

“The hardest part is finding the wraparound care to match up with the funded hours in school nursery. You have to hunt that out yourself, know where to look, get on a waiting list a long time in advance meaning you need to know which school your child will be at. You also lose the “free” 2.5 hours a day if you need to pay for wrap around for the rest of the day as providers still (understandably) charge you for a whole day. So the 30 hours free is not always the case in reality.”

Participants also criticised the 30 hours free childcare offer as being overly complicated:

“Working out the 30 hours funded childcare offer requires some kind of degree - I’ve never known anything be so complicated in all my life.”

“The forms for applying for funding are not straightforward. I’m autistic and accessing funded childcare has been a lot more complicated than it should be. I didn’t access childcare early on because of this.”

“We have twins. The form didn't allow me to say that as they're obviously both the same age and you could only select the age once.”

“It is so confusing to apply for using the 30 hours 'free' childcare allowance across multiple settings, it almost feels like it's trying to put you off.”

“We have found that information about childcare from the age of 3 wasn't easily accessible. Councils should have a list of all the options available in the area. Instead I have had to speak to a lot of local mums to understand the system and what we would be entitled to. This has been taking a lot of headspace and it's not necessary.”

While the provider's viewpoint is not within the immediate scope of this research, it is important to acknowledge that providers operate in demanding environments, and their experiences should be taken into account in future discussions. Some parents also drew attention to the challenging circumstances faced by childcare providers.

“As a parent who accesses the 30-hour free childcare whilst also being a manager of a Cylch Meithrin I see both sides. As a parent, it's good that I can get my child a funded place so I can save that money for other things, however, as a small Cylch Meithrin setting - getting £5/hour of funding for a child is seriously damaging our business. We have had to increase our prices per session/day to be able to breakeven paying the staff wages, but the majority of our parents only want funded childcare which is less per hour than we charge. As funded Childcare Offer places are the majority, it's becoming increasingly difficult to cover our overheads which is ultimately leading to our business failing. Flying Start have now increased their rate to £6/hour in Torfaen, its only £1/hour more but it would be a massive help towards the sustainability of our Cylch.”

“The current funded hours are not funded sufficiently to childcare settings and therefore private nurseries have to cross-subsidise, charging extortionate fees for children under 3. This needs to change and more funding needs to be provided to childcare providers.”

5.4. To sum up...

In summary, childcare offers in their current form continue to present limitations and complexities for many parents, hindering their accessibility. Whilst funded childcare programmes have undeniably had a positive impact on numerous families, both financially and in terms of mental well-being, they fall significantly short of meeting the diverse and evolving needs of families. The challenges lie in the intricate nature of accessing childcare offers, the need to navigate different settings, the absence of wraparound care, and the inadequacy of hours provided. These hurdles collectively underline the necessity for more comprehensive, bespoke and less complicated childcare solutions to better support parents and children.

6. Needs and Recommendations of Parents

The childcare requirements of parents and guardians are undoubtedly formed around their unique family circumstances; however, our survey findings reveal overarching themes that resonate among parents, pointing to shared challenges and concerns within this demographic.

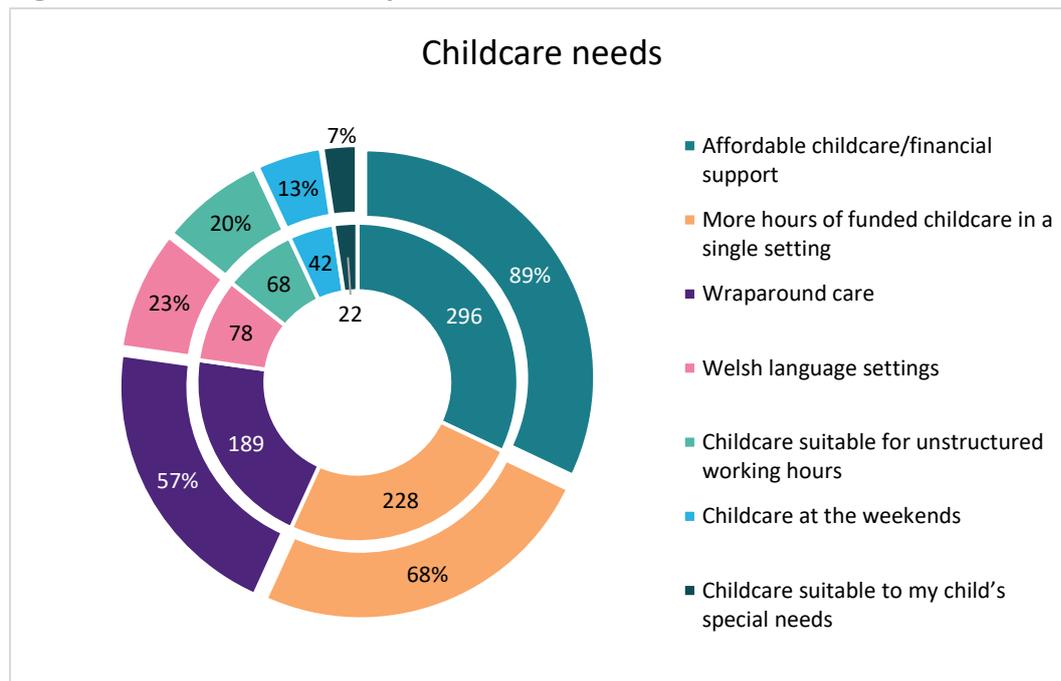
6.1. Childcare needs of parents

As the graphic below demonstrates, the top priorities for parents are affordable childcare, with 89%, and access to more hours of funded childcare in a single setting, with 68%. The need for wraparound care is also highly prominent, with 57% of parents expressing this preference.

There is also a demand for childcare settings that accommodate the Welsh language, noted by 23% of respondents, while 20% seek childcare options suitable for unstructured work hours. Weekend childcare is sought after by 13% of parents. Only 7% of all participants indicated a need for childcare specifically tailored to their children's needs. However, it's worth noting that 32% of parents with disabled children or children with special needs are actively seeking more childcare options that cater to their children's unique requirements, a preference shared by only 3% of parents with non-disabled children and children without health conditions or special needs.⁵⁷

⁵⁷ The views and needs of parents and guardians of disabled children and children with special needs are discussed in Appendix 2.

Figure 9: Childcare needs of parents



It's crucial to discuss the importance of wraparound care further, as the need for it may vary according to the age group of children. Parents with older children who attend full-time school often require wraparound care because they may not be able to provide care for their children after school due to work schedule. One of the participants expressed her need for wraparound care in the following way:

"My major concern has been finding a place for my school-aged children to go to before and after school, so that I can work a full day."

As discussed in the report, however, there is a high demand for wraparound care for parents who have children under 4 years old and are eligible for funded childcare support. Upon closer examination of the survey responses, we observe that 77% of those parents who have 3-4 years old child and utilising *the Offer* are in need of wraparound care (37 out of 48).⁵⁸ The need arises due to the use of different settings in *the Offer*, which presents challenges in finding wraparound care and transferring between two settings in a single day. Therefore, wraparound care comes as a necessity for many parents to utilise *the Offer* in Wales.

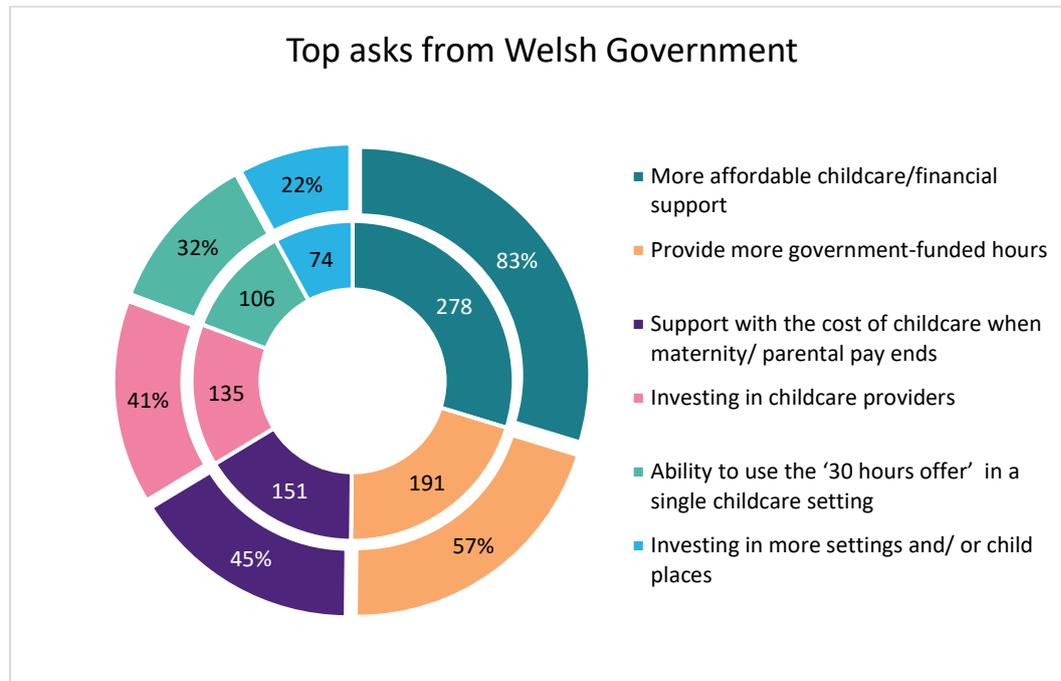
6.2. Parents' asks from the Welsh Government

The graphic below illustrates the asks voiced by parents to the Welsh Government. As depicted, these asks align closely with their childcare needs, with 83% asking for "affordable

⁵⁸ These parents need wraparound care only for their children aged 3-4.

childcare" and 57% seeking an increase in the availability of funded childcare hours. Additionally, 45% of parents ask for support with the cost of childcare when maternity/parental pay ends. Also, 41% of the parents have urged the Welsh Government to invest in childcare providers and childcare settings.

Figure 10: Asks from the Welsh Government



6.3. Parents' recommendations

Survey participants also provided recommendations in their commentary. As a common theme, participants called for greater support to parents in their essential role of nurturing the next generation.

“Parents who want to work and contribute to the economy should be supported in doing so. Parents should be supported in being able to continue their careers. Parents who work hard and don’t try and cheat the system shouldn’t have to worry about putting food on the table, or stopped from having more children because of exorbitant costs.”

“Raising a family can become very stressful. Supporting families with exactly what they need such as allowing parents to leave the workforce to care for their children or providing high quality childcare that meets the needs of people’s working hours.”

The lack of support for parents on parental leave and their return to work echoed by the participants:

“Help with funding needs to start as soon as maternity ends to enable mums to get back to work. Once out it is hard to go back for many reasons...”

While participants proposed investments in childcare settings, they also emphasised the importance of considering the working conditions of childcare workers. Given that parents can't afford more, the labour of nursery staff should not be further undervalued and negotiated to make childcare more affordable. Instead, participants echoed that the workforce should be supported.

“The cost of private nurseries is so high yet the staff in the nurseries are not paid a lot. We need to ensure the staff in the nurseries are paid correctly so the level of care is high.”

“More support is needed to the actual childcare providers to keep the costs manageable for families whilst being able to offer better wages to staff within the sector. A better pay for staff would support the recruitment issues and help keep qualified and trained staff in the sector.”

“Get more teachers into nurseries / support and incentivise nursery staff gaining higher quality qualifications e.g. apprenticeships. They are amazing but need more pay and more professional status!”

“It's also important that childminders are paid fairly in order to prevent the fantastic childminders we have from leaving the sector.”

Parents also ask for more hours in one setting:

“Improved local services like this, beyond private childcare settings which provide all day and wrap-around transport (which sucks up the 30 hours) would be really welcome.”

“Rather than having 2.5 hours a day it would be a lot better if they could attend nursery school for 2 days. Or, just let us use the full 30 hours in one setting.”

Overall, participants suggest a holistic and bold approach from the government:

“Flexible working policies and all these other changes the Government keeps introducing to keep us happy (and get good media coverage) are not enough. It is the cost and arrangements for childcare which are a problem. (...) The Government needs to review the whole things in one piece, not in isolated chunks as that doesn't make sense and doesn't work. So, flexibility for parents, costs, maternity pay and everything.”

“We pay more for childcare per child than for our mortgage. Addressing affordability of childcare would make a huge difference- also addressing the gender pay gap as so many women are pushed out of their jobs or into reduced hours due to a lack of affordable childcare.”

6.4. To sum up...

In summary, parents are seeking a more holistic and bold approach from the Welsh Government to address their pressing concerns. Notably, affordable childcare stands as the primary and widely-shared demand among the majority of parents. Their appeals include the need for increased funding within a single childcare setting, alongside the availability of wraparound care.

Extending the childcare offer to cover children under 2 years old is another significant request. Additionally, parents are advocating for enhanced support during parental leave and are highlighting the critical importance of providing support to childcare providers and childminders.

7. Conclusion and Recommendations

7.1. Conclusion

The childcare landscape in Wales is characterised by a high and escalating cost with limited financial support rendering it increasingly unaffordable and out of reach for many families.⁵⁹ This financial burden often leaves parents and guardians in dire financial situations, struggling to meet essential needs and leaving little to no savings or disposable income.

Parents and guardians tell us they are struggling, and many are at breaking point. This is felt acutely by families in low-income households, single parents, those with disabled children or children with Additional Learning Needs, parents working atypical hours, and families residing in rural areas.

The impact of childcare costs on women's employment is particularly pronounced, as many are forced to leave the workforce or return on a part-time basis, contributing to a significant skills gap in the economy. The difficulty in finding jobs that accommodate caring responsibilities further compounds the challenges faced by parents, especially women.

There is a pressing need for robust and accessible support systems, coupled with streamlined eligibility criteria.

While parents and guardians appreciate the initial benefits of existing funded provision, they express concern about having to use a range of settings in order to access funded offers. They overwhelmingly feel that 2.5 hours a day of childcare is not enough to address their needs and they are concerned that the system is still overcomplicated and not easily accessible.

This has been compounded by the misalignment of UK-wide benefit systems with service provision in Wales, adding an additional layer of complexity for families seeking accessible and affordable childcare.

Parents and guardians consistently highlighted the absence of support for children under 3 years old and the constraints of the Flying Start programme, reflecting a need for support once maternity and shared parental leave ends.

In response, parents are calling for a more holistic approach and bold actions from the Welsh Government. Affordable childcare is a top priority for the majority of parents,

⁵⁹ It is important to recognise that not all childcare providers are accountable for the increasing cost of childcare services, given that most of them operate as non-profit organizations and the childcare workforce comprises some of the lowest-paid workers.

accompanied by demands for increased funding within a single setting and the availability of wraparound care. Extending the funded childcare provision to cover children under 2 years old is another critical request, as is support during parental leave and assistance for childcare providers and childminders.

Developing childcare policies and support programmes that guarantee access to quality care for all families in Wales is critical. Instead of building on a model that does not meet the needs of families, it is vital that we create a visionary plan that simplifies childcare provision for families. Addressing these complex issues is necessary to achieve this goal.

7.2. Recommendations

1- The Welsh Government should continue to prioritise investment in childcare:

We recognise that enhancing childcare provision and support in Wales requires substantial investment. We also understand the constraints on the Welsh Government's budget. Nonetheless, it is imperative to refrain from cutting the childcare investment budget. Funds should be allocated to address immediate parental needs, as highlighted in this report, which will yield long-term economic benefits.

2- Childcare for all children must be at the heart of the Welsh Government's child poverty strategy.

All children, particularly those in low-income families, benefit from free/affordable childcare not just those aged two living in designated areas. It is critical that the Welsh Government provide funded childcare for low-income families to reduce the cost, provide opportunities to children and families and tackle child poverty. The Welsh Government's child poverty strategy should ensure disadvantaged children are not left behind.

3- The Welsh Government should develop a blueprint for a future-focused childcare plan to meet present and future needs by

- Committing to full participation in an Expert Advisory Group focused on developing a visionary plan for the future of childcare in Wales. This plan should align with the Welsh Government's cross-cutting anti-poverty and gender equality ambitions while meeting the needs of parents and guardians in Wales.
- Prioritizing the pivotal role of the childcare workforce in the expansion of accessible and affordable childcare services. This approach should also involve an exploration of the requirements and challenges within the childcare workforce to ensure effective implementation.
- Ensure that due consideration is given to intersectional inequalities when planning childcare support, adopting an intersectional approach to comprehending the diverse needs and challenges faced by different groups within the childcare system.

4- The Welsh Government should create a seamless and affordable childcare system that is affordable for all by

- Addressing the gap and transition issues within the existing childcare provisions. The disparity in target groups between the current schemes, namely Flying Start and the 30-hours-funded childcare offer, confuses parents and hinders the continuity of childcare support and provision.
- Developing strategies to bridge this gap and establish a more unified and universal childcare system. This will require a thorough exploration of the reasons behind underutilised support.

5- The Welsh Government should address the negative impact of the UK benefit changes on Welsh families by

Closely examining how recent changes in the UK benefit system may negatively affect Welsh families resulting in unjust sanctions. This analysis should inform proactive solutions to mitigate any adverse impacts on parents' access to childcare due to changes in the benefit system.

6- The Welsh Government should prioritise recognising the significant contribution of unpaid care and domestic labour to our economy by

- Ensuring future plans reflect the critical role informal childcare plays in our childcare infrastructure including recognition and support for those who provide informal childcare.
- Recognising the value of unpaid care and understanding its impact on families, children, and caregivers is crucial to shape effective policies and support systems.

7- We echo the previous asks from the Welsh Government:⁶⁰

- We call on the Welsh Government and ask that they make childcare affordable and accessible for parents of all children from six months.
- We urge the Welsh Government to expand childcare provisions to unemployed parents and those working fewer than 16 hours to support them in seeking and advancing employment, as well as supporting the childcare needs of people seeking asylum.
- The Welsh Government should invest in nursery and early education provisions to ensure they are accessible to all parents, when and where they need them. This should particularly address the lack of provision during atypical working hours, provisions for disabled children and those with additional learning needs as well as provision in rural areas.

⁶⁰ [Feminist Scorecard 2022: Tracking Welsh Government action to advance women's rights and gender equality.](#)

Appendix 1 - Research Methodology and Survey Demographics

The survey, conducted by Oxfam Cymru on behalf of the [Make Care Fair](#) Coalition, was administered over a six-week period from July to August 2023. We utilised the Typeform platform for data collection and promoted the survey through various social media channels and networks. Our primary focus in this survey was on parents and guardians with children under the age of nine, aiming to delve into their access to childcare services in Wales, with a particular emphasis on their experiences with the Welsh Government funded childcare, including the 30-hour-funded childcare programme.

The analysis of the survey was conducted by incorporating both topical questions and open-ended inquiries into the discussion. It's worth mentioning that we deliberately retained most of the comments from the open-ended questions in this report, as this approach provides a more comprehensive platform for highlighting the diverse voices of parents and their multifaceted needs.

A.1.1. Respondents profile

Over a span of six weeks, we gathered a total of 335 usable responses, with a predominant representation of women.

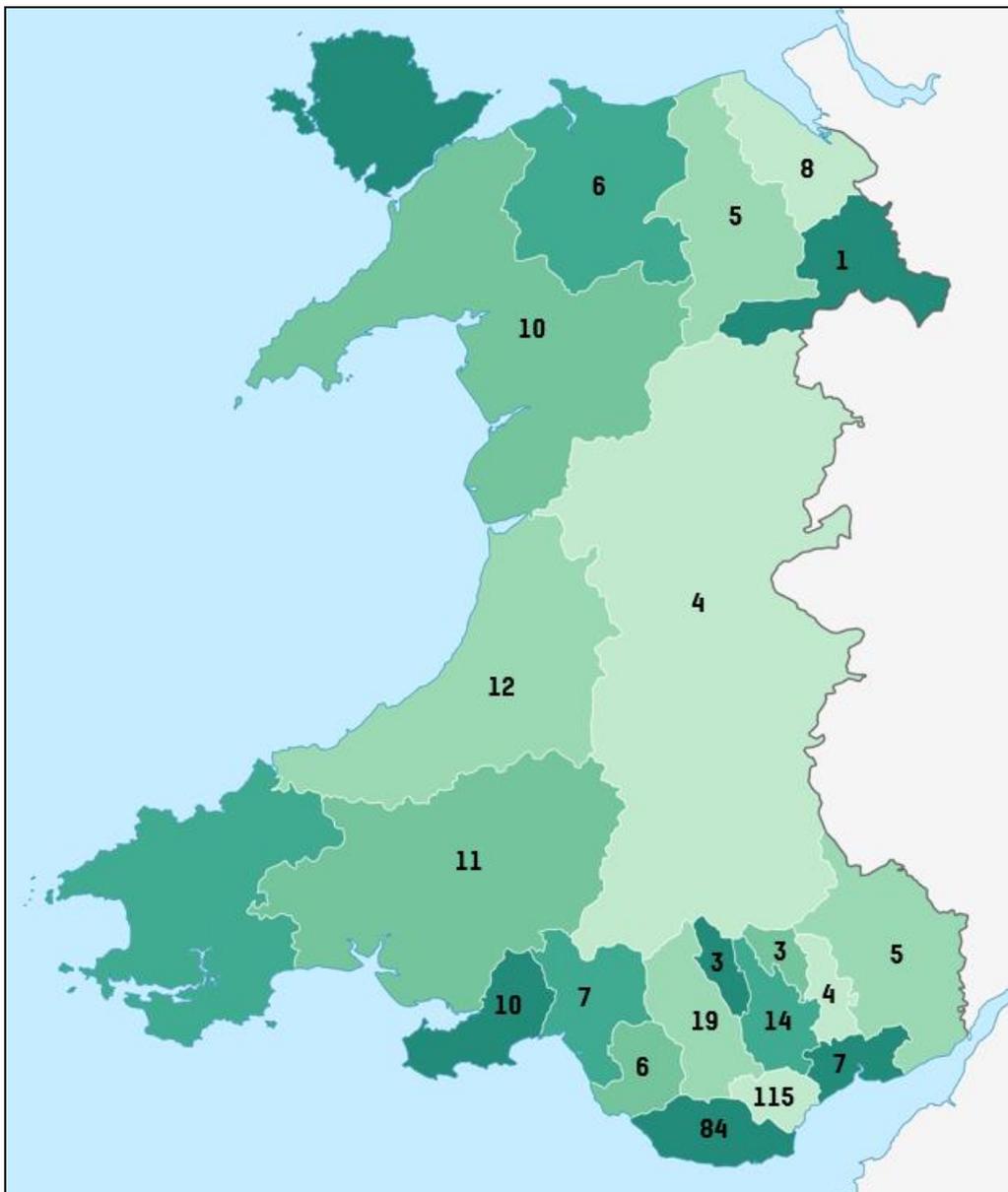
Women	315	94%
Men	19	5.7%
Non-binary	1	0.3%
Total	335	100%

Despite our intention to promote equal participation from both genders, the level of interest from men in the survey fell short of our expectations. Regrettably, this disparity in response rates prevented us from obtaining a sufficient number of male responses to facilitate a meaningful comparison of childcare experiences between men and women.

In the analysis of the survey, we look at all parents, but, due to the low response rate from men, the results reflect more of the experiences of women about childcare. In some questions, we specifically look at responses from women and non-binary responses to avoid any deviation, even though it would be minor.

The distribution of responses by local authorities is shown in the map below. Not surprisingly, the majority of the survey participants live in South Wales, predominantly in Cardiff (no of responses 115) and Vale of Glamorgan (no of responses 84).

Figure A1.1: Number of respondents by Local Authorities



Source of the map: Wikipedia

To explore the variations in accessing to childcare between urban and rural areas, we queried participants about their place of residence. Among the respondents, 245 indicated they reside in urban areas, while 81 reported living in rural settings.

The table below shows the age groups of children of parents/guardians who responded to the survey. As the figures indicate, 75% of the children are below 5 years old, school year 1.

Age Group	Number of Respondents
0-12 months	65
13-23 months	66
24-35 months	91
3-4 years old (early years)	101
4-5 years old (reception)	43
5-6 years old (year 1)	37
6-7 years old (year 2)	34
7-8 years old (year 3)	25
8-9 years old (year 4)	23
9-10 years old (year 5)	11
10-11 years old (year 6)	11
11-12 years old (year 7)	8
12-13 years old (year 8)	6
13-14 years old (year 9)	3
14-15 years old (year 10)	2
15-16 years old (year 11)	2
16-18 years old	3

37 respondents (11%) said that they are parents or guardians of child or children who is disabled or has health condition or illness, and/or special educational and care needs.

Participant demography

- 65% (217/332) of the participants were in the 30-39 age bracket. 27% of the participants were in the 40-49 (91/332) age bracket, and only 6% (20/332) of the participants were in the 20-29 age bracket.
- 4.6% of the participants (15/326) indicated that they consider themselves as a disabled person.⁶¹
- 94% (315/335) of the participants described their ethnicity as white, and 5% describe their ethnic identity as non-white and other.⁶²
- 74% of participants (246/332) indicated their marital status as married or in civil partnership. 18.4% (61/332) mentioned they are co-habited, 4.8% of the respondents (16/332) indicated that they are single, and 1% of the participants (4/332) were divorced.

⁶¹ We fully embrace social model of disability, and ask disability questions in the survey accordingly. Social model of disability says that people are disabled by barriers in society, not by their impairment or difference. Barriers can be physical, like buildings not having accessible toilets. Or they can be caused by people's attitudes to difference, like assuming disabled people can't do certain things.

⁶² We asked ethnic background of the participants in detail by using the categories from Census 2021.

Employment status and income

- The majority of survey participants, comprising 56.6% (188 out of 332), reported working full-time. Among the participants, 31% (103 out of 332) mentioned that they work part-time, with only two of them being men. Additionally, 8.4% (28 out of 332) of participants stated that they are self-employed, including four men. Six respondents identified themselves as freelancers or casual/zero-hour workers. Furthermore, 12 participants indicated that they are unemployed and actively seeking paid work, while 9 respondents stated that they are not currently engaged in paid work and are not actively seeking it, all of whom are women. 3 respondents mentioned that they are on maternity leave, and one respondent said that they are an unpaid carer.

Employment of participants	(No of responses=332)*	Percentage
Full-time employee	188	56.6%
Part-time employee	103	31.0%
Self-employed	28	8.4%
Unemployed/Looking for paid work	12	42.9%
Not in paid work/not looking for paid work	9	32.1%
Student	7	25.0%
Casual/zero-hours/ gig worker	3	42.9%
Freelance	3	42.9%
Other	4	57.1%

* Some respondents marked more than one choice.

- We also asked about the employment status of the respondents' partners, if they have any. 81.4% (249 out of 306) of the respondents said that their partners work full-time. Not surprisingly, 238 women out of 288 (83%) said that their partners work full-time employees, and 40 of them said that their partners are self-employed.

Individual and household incomes

The graphic below shows the *individual income* distribution of the survey participants, where the columns represent women and non-binary participants, and the line represents men. As the graphic displays, our sample group was distributed evenly around equal/below average, and above average. Specifically, 50.5% of the participants fell within or below the £25,571-£31,570 threshold, while the remaining 49.5% exceeded this threshold.⁶³

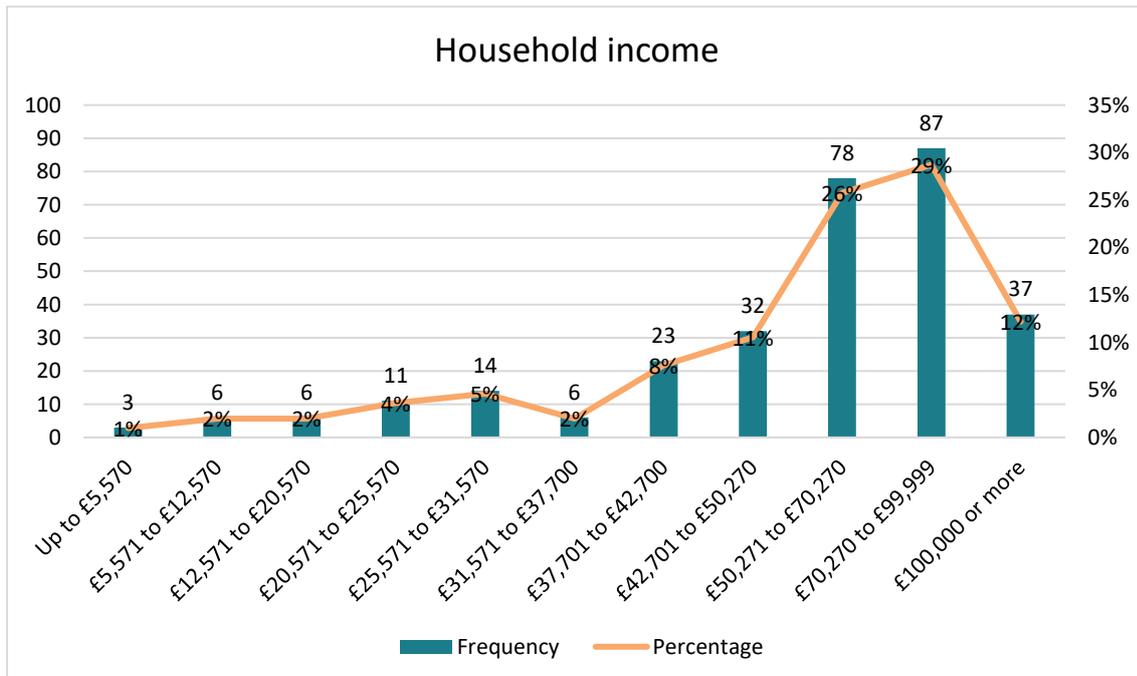
⁶³ In 2022, the average gross annual income for all workers in Wales stood at £25,988, with women earning an average of £22,041 and men earning an average of £30,210. (Source: Annual Statistics of Hours and Earnings (ASHE) Workplace Analysis, via NOMIS)

Figure A1.2: Individual income by gender



The distribution of household income among survey participants differs from the distribution of individual income, as seen in the graphic below. A substantial 67% of the participants report a household income exceeding £50,271.

Figure A1.3: Household Income



The income figures show us that our survey does not fully cover the experiences of low-income families.

Limitations of the research

These figures also reflect the limitations of our research. Childcare is a complex domain influenced by numerous factors that shape the experiences of parents and guardians. Given the constraints of both space and time, achieving a sample size sufficient to cover the diverse and intersecting factors affecting parents/guardians' experiences with childcare is not feasible.

Our research covers working mums who share parenting with a partner, and have average income. This means that we could not wholly cover the experiences of single, lower-income households, as well as the experience of men and people from racialised backgrounds.

A.1.2. Childcare provisions referred in the survey

As part of our methodology, it's important to specify the terminology we employed for categorising childcare provision in Wales. In our research, we have classified childcare into two primary groups: formal and informal childcare. Within the survey, we inquired about parents' experiences and access to both of these types of care. This approach was adopted to gain a comprehensive understanding of how these categories impact individual and family circumstances.

Formal childcare refers to the professional, registered, and paid caregiving provided by trained individuals in various settings. Notable examples of formal childcare settings in Wales include:

- Private Day Nurseries
- School nurseries/ Early education settings
- Playgroups/Cylch Meithrin (Welsh Medium Playgroups)
- Childminders
- Nannies or babysitters
- Wraparound care settings

By *informal childcare*, we refer to unregistered childcare provided by family members (e.g. grandparents, siblings, cousins) and/or friends. Informal childcare is usually unpaid care arranged among family members and/or friends, and not recognised by the care authorities or government as a form of care. Hence, any support around childcare excludes informal care.

Appendix 2 - Childcare for disabled children and children with special needs

In our survey, 37 parents/guardians identified themselves as primary carer of disabled children or children with health conditions, or special needs. It's important to note that this sample size does not adequately represent the broader spectrum of experiences among parents in similar circumstances. Nevertheless, we have highlighted the responses of these parents in our analysis.

As the table below shows, the view of parents of disabled children and children with health conditions on the quality of childcare is fairly distributed, with a slight incline to agreement that they are not happy with the quality of childcare.

While parent's opinions are fairly distributed on the quality of childcare, 81% of the parents of disabled children and children with health conditions or special needs find it difficult to juggle among different settings of childcare, and 70% of them think that using different settings is not easy for their children.

Table A2.1: Quality of childcare

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
I am not happy with the quality of the childcare I can access/afford	4	8	11	6	8	37
	32%		30%	38%		
Juggling among different settings of childcare is a challenge for me	0	1	6	15	15	37
	3%		16%	81%		
Using different settings for childcare is not easy for my child	2	0	9	10	16	37
	5%		24%	70%		

Childcare also has an impact of parents' wellbeing and health. 69% of the parents agreed that worrying about childcare has had a negative impact on their health and wellbeing.

81% of the parents of disabled children said that lack of funded childcare has had a negative impact on their work and career. Likewise, 88% of the parents said that the need for childcare has had an impact on accepting new work or additional hours.

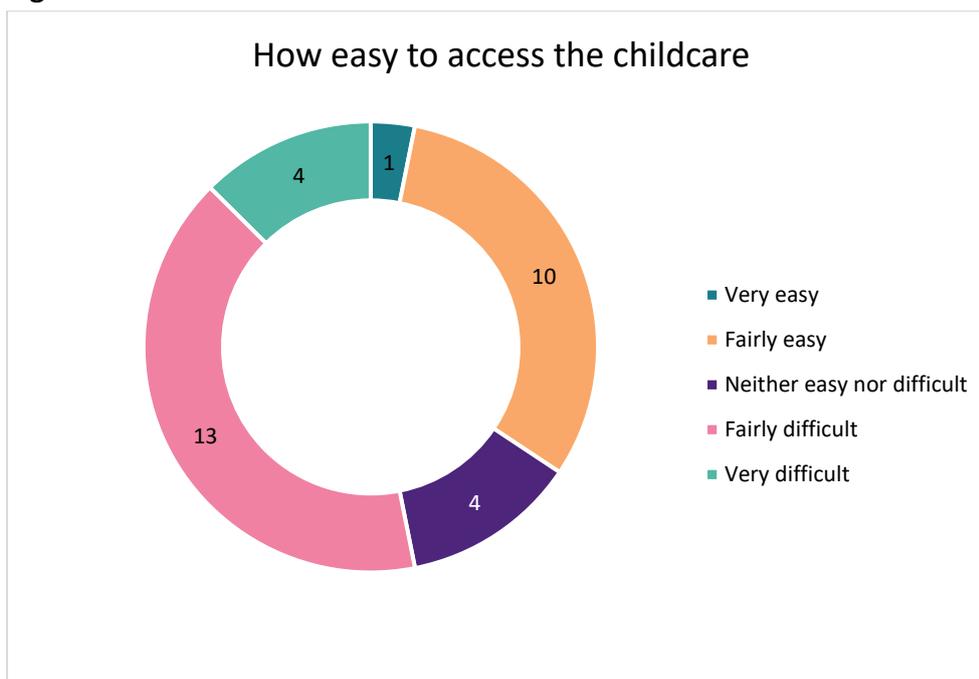
To note that, all parents who agree or disagree that the need for childcare has affected their well-being, work and career are women.

Table A2.2: impact on childcare on employment and career

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
Worrying about childcare has had a negative impact on my mental health and wellbeing	4	1	6	9	16	36
	14%		17%	69%		
Lack of funded childcare has had a negative impact on my work or career	2	5	0	12	17	36
	19%		0%	81%		
Need for childcare has had an impact on my ability to accept new work or additional hours	1	2	1	10	20	34
	9%		3%	88%		

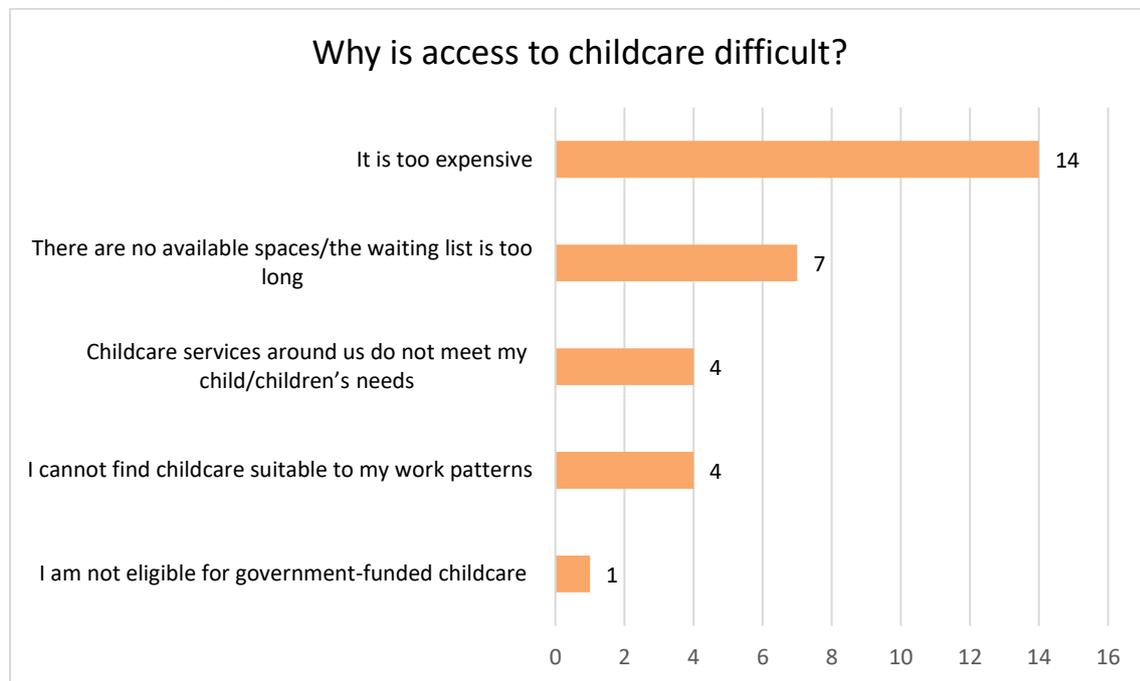
We asked parents if they used formal childcare in the last five years and how easy it was to access. 34% of the parents found access to childcare easy, whereas 54% of the parents found it difficult.

Figure A2.1: Access to childcare



The primary reason emphasised by parents facing difficulties in accessing childcare is its cost. The distribution of these reasons is displayed in the table below.

Figure A2.2: Why access to childcare is difficult



Although the sample sizes are limited, it is still worthwhile to explore the distinctions between rural and urban settings. Among the five parents residing in rural areas, all expressed concerns about the affordability of childcare, four reported a lack of available childcare spaces in their local areas, two struggled to find childcare that matched their work schedules, and one mentioned that local childcare services did not cater to their children's specific needs. In contrast, among the twelve parents from urban areas who also faced difficulties accessing childcare, cost of childcare was mentioned as the main problem, whereas available spaces and waiting lists are not much of a concern.

One of the participants living in a rural area articulated the difficulty that she experienced with childcare as such:

“Childminder could not fit youngest child in due to being at her numbers of under 5s. So had to use another childminder in another village. This childminder decided to reduce hours, older child's childminder still full so had to travel to another village to a childminder that was more expensive.”

Childcare provision in urban areas also a problem for parents of children with special needs. A parent complained about the lack of childcare provision around her:

“There is only childcare for my disabled child available for 6 days to cover 6 weeks of summer holidays. Provision for disabled children is next to non-existent”.

Another parent also indicated that her child has *“a non-verbal autism and there is nothing that is appropriate or suitable for them”.*

Informal care

Out of the parents with disabled children, 59% (22 out of 37) also rely on regular "informal" childcare, receiving assistance from their families and friends. These parents who utilise informal care hold contrasting opinions, as illustrated in the table below.

Table A2.3: Informal care

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
Informal childcare meets my needs	3	5	3	7	4	22
	36%		14%	50%		
Informal childcare is reliable for me	3	7	2	7	3	22
	45%		9%	45%		
Informal childcare is the only option for me due to childcare costs and difficulties in accessing childcare	1	4	6	5	6	22
	23%		27%	50%		

Funded childcare in the case of parents of disabled children or children with health conditions and special needs:

Among the 37 parents surveyed, 19 reported having access to formal childcare provided by the Welsh Government, while 16 indicated that they did not, and two were uncertain. Of those who had accessed funded childcare within the last five years, only one mentioned utilising the Flying Start programme, 18 indicated using *the Offer* and one was unsure about *the Offer* they had accessed.

Among those who did not have access to funded childcare, three of them had children under 2 years old, making them ineligible for the available support. Out of the remaining 13 with children aged over two, who potentially could have been eligible for available childcare support, seven stated that they did not qualify for any funded childcare support. Among these seven parents, three indicated that they were not within the Flying Start area, while

two were uncertain about their eligibility for funded childcare support. One of the parents also mentioned that she looked after her children.

Parents who utilised the Welsh Government’s *Offer* told the impact of it, particularly on their finances, is positive. 78% of the parents/guardians said funded childcare had made a significant improvement on their finances, and 71% said that it helped them cope with the cost-of-living crisis.

Parents also tend to agree that funded childcare has a positive impact on their well-being and mental health.

Table A2.4: Impact of funded childcare

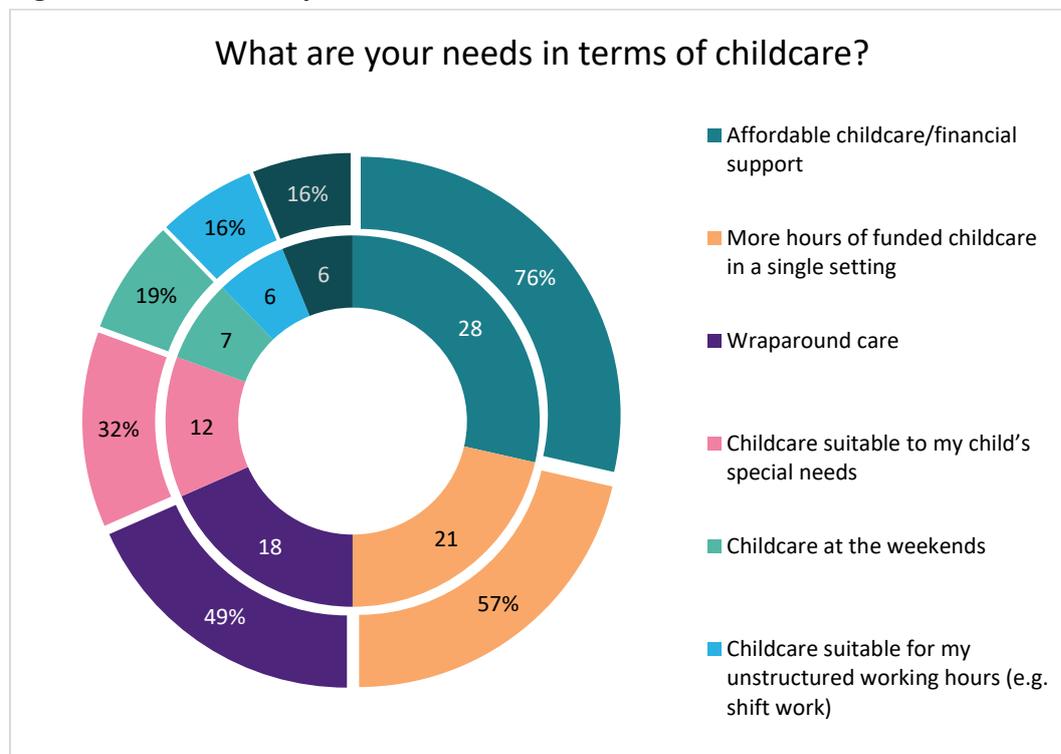
	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Total
Funded childcare made a substantial positive impact on our finances	2	1	1	5	9	18
	17%		6%	78%		
Funded childcare has helped me keep up with rising costs of living	1	1	2	2	8	14
	14%		14%	71%		
Funded childcare has helped me to have more time for myself/ improved my mental health	4	2	4	3	5	18
	33%		22%	44%		
Having 2.5 hours childcare a day in one setting has not been enough	0	1	1	4	12	18
	6%		6%	89%		
I would have returned to work or increased my hours quicker if more funded childcare had been available	0	3	2	1	12	18
	17%		11%	72%		
I couldn’t access the wraparound support that I needed (transport between settings or other cares like childminder)	1	6	2	1	8	18
	39%		11%	50%		

Parents also clearly emphasised that 2.5 hours of funded childcare a day is not enough with 89% agreeing or strongly agreeing with the statement. 72% of the parents also mentioned that they could have returned to work or increased their working hours quicker if more funded childcare had been available.

Parents' needs and recommendations

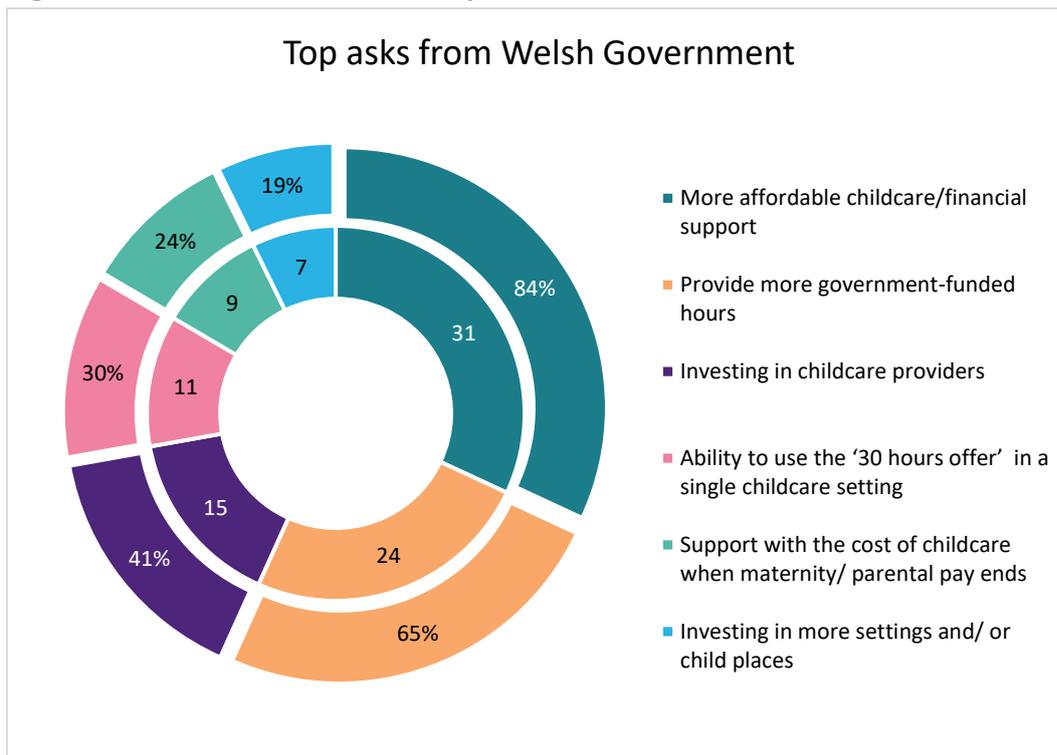
As depicted in the graphic below, the top priorities for parents are affordable childcare, with 76%, and access to more hours of funded childcare, with 57%. Following closely are demands for wraparound care, at 49%, and childcare that aligns with children's specific needs, at 32%. It's worth noting that the demand for childcare tailored to children's needs is only 3% among parents of non-disabled children and children without health conditions, or special needs.

Figure A2.3: Needs of parents of disabled children



The graphic below illustrates the asks voiced by parents to the Welsh Government. As depicted, these asks align closely with their childcare needs, with 84% asking for "affordable childcare" and 65% seeking an increase in the availability of funded childcare hours. Additionally, 41% of parents have urged the Welsh Government to invest in childcare providers and childcare settings.

Figure A2.4: Recommendations of parents of disabled children



Parents of disabled children and children with health conditions/special needs also made some comments on their experiences.

“I have children of varying ages with different needs, so a one-size-fits-all all approach doesn’t work for families of multiple children. Also, the cost of childcare has rendered it impossible for me to return to work.”

“The Vale of Glamorgan has woeful support for parents or children with autism and it has massively effected our mental health and ability to work.”

“My child has ASD & finding childcare settings to accommodate him has been so difficult. Feel that we’re a lost voice that is forgotten about & it really hampers parents' work.”

“Extra funding needs to be provided for children with additional needs. There aren't many places available for parents to place their kids.”

“If you have a disabled child, it is impossible to work full-time. Childcare for disabled children is next to non-existent. School holidays are impossible. They don't even get the same amount of time in school as non-disabled children. Her school day is 30 minutes shorter every day; she has 2.5 hours less schooling per week than her non-disabled sibling! We have to use hours meant to be for respite to cover the gap between school finishing (early

*because she doesn't get a full school day - why??) and work finishing.
Disability discrimination at its finest.”*

“Childcare centres do not want to take children with additional needs and do not have the understanding or resources to provide care for them. There is no childcare available for huge amounts of people in Wales who would like to work.”

To sum up...

Due to the limited response rate, demonstrating the diverse experiences of parents and guardians of disabled children and those with special needs proves challenging. Despite the modest sample size, discernible nuances emerge, shedding light on the varied experiences of these parents. A strong call from the parents of disabled children, emphasising the critical need for childcare provisions tailored to their children's unique needs. The limited access to childcare settings intensified the challenges faced by both parents and children in navigating an environment that accommodates their specific needs.



For more information, or to comment on this paper, email: oxfamcymru@oxfam.org.uk