



# State of the Sector School-Age Childcare Initial Key Findings

During autumn 2024, PlayBoard NI, in partnership with the School-Aged Childcare Forum, undertook a State of the Sector Survey. The survey was an opportunity for School-Aged Childcare providers, childminders, parents, and children and young people to share their views to ensure we have a clear understanding of the opportunities and challenges currently facing the School-Age Childcare sector in Northern Ireland.

## Initial key findings

### *School-Age Childcare settings*

- 113 respondents equating to 27% of the overall SAC sector.
- Geographical spread across Northern Ireland with a mix of rural, urban and rural/urban combined coverage areas.
- Majority of respondents established pre-2009 (59%), 33% established between 2010 and 2019, with 8% established post 2020.
- Total number of childcare places provided per week (not unique children) of 10,057.
- 2,846 families availing of School-Age Childcare support through the respondent base.
- Significant financial challenges facing the sector with significantly increased levels of expenditure (rising staffing and overhead costs) and increased competition from low-cost after-school activities.
- Only 44% of respondents report being currently sustainable with 15.5% at immediate risk of closure and 40% facing challenges to becoming sustainable within the coming 12-month period.
- 78% report difficulties in recruitment and retention of staff due to a lack of qualified and experienced applicants, pay and conditions being non-reflective of the importance of the role, and a drift of experienced staff from the sector.
- 84% of respondents identify an increase in children with a range of additional needs, and challenges in meeting that need (lack of ability to deliver one-to-one care, lack of trained staff, inadequacy of capital infrastructure).

### *Childminders*

- 130 respondents
- **Challenges and concerns**
  - 46% reported an increased demand for services for children with special educational needs.
  - Numerous school pick-ups are difficult to coordinate, with parking at schools also causing issues for childminders with younger children.
  - Cost of living (both in terms of their own service costs and on parents) - concerns around parents opting to use unregistered childcare due to childcare costs and affordability.
  - Unregistered provision – cheaper alternative childcare being provided by unregistered services impacting on their numbers. After-school activities being utilised by parents as a cheaper option.
  - Lack of financial support or incentives for parents utilising School-Age Childcare.

## Parents

- 200 respondents
- **Affordability**
  - 95% of respondents stated this was their top consideration.
  - School-Age Childcare is becoming unaffordable with 80% of respondents reporting that the cost has had a financial impact on their household.
  - With parents of school-age children currently ineligible for support from the Northern Ireland Childcare Subsidy Scheme, parents are being forced to alter their working patterns, cease employment, and 73% are over-utilising avenues of care such as families and friends, and more worryingly, unregistered provision.
- **Distance to setting from home/school and accessibility**
  - 85% of respondents require their setting to be close to home or school, however just under 50% are within two miles of their setting, and 75% still travel by car.
  - In more rural areas, access to school-age provision is challenging.
  - Furthermore, respondents rated settings as 7 out of 10 in terms of location and ease of access.
- **Play provision and experiences**
  - 83% recognised the importance of high-quality play provision and experiences.
  - Although 80% of respondents are happy with provision, parents have recognised that the capital to cover upgrades and refurbishments to buildings and outdoor areas and replacement of resources is simply not available. Parents are aware that this alongside the extortionately high running costs is having a detrimental impact on the quality of provision provided.
- **Outdoor provision**
  - 70% of respondents recognised outdoor provision as a top priority. Whilst the majority of parents acknowledged that their child(ren) have access to the outdoors, the quality of the environment is extremely concerning, and children are not accessing the experiences that support their holistic development and well-being.
- **Additional needs**
  - 30% of respondents reported that their child(ren) have an additional need. It is encouraging to hear that 76% of respondents feel their child's needs are met, however the survey shows that parents of children with additional needs find settings only 63% inclusive. One respondent commented, "Not enough places for children with additional needs. Not enough staff for the one-to-one my child needs, nor training available for staff in additional needs support."

## Children and young people

- 77 children participated from five School-Aged Childcare settings.
- **Play opportunities**
  - 95% reported that they had valuable play opportunities within their out-of-school setting.
  - When asked if they received enough outdoor play opportunities, 57% responded no, they would love to be outdoors more.
  - Children told us that they get the opportunity to play, socialise and relax. One respondent commented, "I love getting to play in the dirt", whilst another child commented, "My out-of-school setting is somewhere I can relax before I go home."
- **Setting**
  - When asked how their out-of-school setting made them feel, 89% said their setting had a positive impact of their life and on their family, with "safe", "playful" and "excited" being common themes. One respondent commented, "I like that I can come here and spend time with friends outside of school, it can be quite loud at home with my brother and it's nice to be able to come here and spend time with other young people who also have a sibling with autism."
  - When asked what words best describe their leaders, "playful" was the most common response.