

Early Childhood Education and Care: Jersey, 2024

The aim of this report is to provide information on childcare and early years provision in Jersey and to investigate how the sector is changing over time. The survey was first administered at the end of 2023 and this year reflects an opportunity to evaluate whether some of the key challenges facing the childcare and early years sector in 2023 have changed. Specifically, this survey sets out to provide important insight into the capacity of the childcare and early years providers to care for Jersey's children aged under 5 years. In addition, this report provides a picture of the workforce and identifies the key challenges faced over the short to medium term.

In 2024, the survey covers five types of childcare and early years provider:

Government of Jersey school nurseries – These are Government of Jersey primary schools) that have a nursery provision. The majority of Government of Jersey primary schools on the island now have a nursery provision, catering for children aged 3 to 4 (NEF year). One Government of Jersey school is piloting provision of a small number of places for children aged 2 to 3 years.

Registered settings – These include private, not-for-profit and charity led day nurseries providing care for children under 5 years. Nursery classes attached to private schools are also included in this provider type. All registered settings are registered with the Childcare and Early Years Service to care for a specified number of children. These settings must meet the terms and conditions of registration such as appropriate child to staff ratios and are subject to a quality and compliance review every two years.

Registered childminders – Practitioners who have registered with the Childcare and Early Years Service to care for babies and children aged up to 12 years old. Registered childminders are self-employed and provide childcare from their own homes. They must meet the terms and conditions of registration such as holding relevant qualifications and undertaking ongoing training. Every year they are subject to a quality and compliance review.

Accredited nannies – Those nannies who have chosen to pursue an accreditation route with the Jersey Child Care Trust (JCCT). This is not a statutory requirement of being employed as a nanny as they are not registered under any Law. Nannies are employed by a private family and work from that family's home. Their duties can also include additional responsibilities such as housework. To become an 'accredited nanny', practitioners must meet the professional standards set out by the JCCT, such as the minimum qualification standard etc.

Childhood settings - Organisations who provide wrap around care for children in Jersey in the form of breakfast and after school clubs, holiday clubs and activity clubs. In 2024, the sample of childhood settings surveyed was reduced to reflect the small number of providers that are registered with The Childcare and Early Years Service to care for children aged 3 to 4 years.

Summary

Number of providers and their characteristics

- In 2024, there were estimated to be 129 childcare and early years providers in Jersey providing day care or wrap around care for children aged under 5 years. This number has decreased marginally since 2023 due to the loss of <10 accredited nannies.
- In 2024, there were 7 childhood settings registered to offer wrap around or holiday cover for children of pre-school age.
- No further decline in the number of registered childminders was recorded in Jersey in 2024, whilst across England, further decline of 13% was recorded across the same period.

Registered places, filled places and capacity

- The number of registered places for children aged under 5 years (2,260) has increased by 40 places in 2024
- Growth in registered places reflects the expansion of certain registered settings and the opening of a new pilot registered setting.
- The average number of registered places per provider remains similar to 2023 and for Government of Jersey school nurseries and registered childminders, it remains significantly lower than in England.
- A total of 2,220 children aged under 5 years are estimated to attend childcare and early years settings reflecting a marginal increase since 2023.
- Registered childminders generally care for babies and younger children when compared to other provider types, with 89% of their places filled by children aged under 3 years.
- In comparison, around half of all children booked to attend registered settings and with accredited nannies were aged 3 to 4 years.
- More than half all providers reported capacity to care for additional children aged under 5 years.
- In 2024, 90% of Government of Jersey school nurseries reported capacity to care for additional children equating to around 220 unfilled places.
- Whilst registered settings reported around 120 unfilled places/sessions, the majority of these were for younger children (aged under 3). Registered settings reported only minimal capacity to care for children aged 3 to 4 years.
- Registered childminders reported significantly more capacity to care for younger children under 3 years than in 2023; in the latest survey around 40% of registered childminders said they expected to have more capacity again by September 2025.
- Registered childminders reported more capacity to care for additional children in the latter half of the week (Thursday and Friday) than at the beginning of the week, and both registered settings and

childminders said they had more capacity during whole day sessions and afternoons rather than in the mornings.

- 33% of registered settings and 14% of childminders said they had no difficulties in filling their registered places, this compares to around half of both provider types who said they had no issues in 2023.
- The most common reason cited for having difficulties filling registered places was only having capacity on certain days and at certain times.
- Many providers reported that parents are choosing to have their children cared for by friends or relatives, for at least part of the week, to reduce childcare costs. This is making it difficult for providers to fill their full-time registered places.

Childcare and early years workforce

- There was estimated to be 670 employees working directly with children aged 0 to 4 years, reflecting an increase of 7% compared to 2023.
- The increase in early education and childcare employees is mirrored in England where the number of employees grew by 6% across the same period.
- The mean number of total employees per provider has increased within registered settings in the latest year from 17 in 2023 to 19 in 2024.
- There has been an increase in the proportion of employees on full-time contracts rather than part-time in the latest year.
- The average turnover rate for all group settings (Government of Jersey school nurseries and registered settings) was 11% in 2024 and ranged from 8% in childhood settings to 14% in nurseries.
- The number of vacancies reported across all group settings was around 60 in the last year; 80% of all vacancies were for qualified staff and virtually all positions were part-time in nature.
- The number of open vacancies in registered settings fell by more than a third compared to in 2023.
- All registered settings thought they would have difficulties recruiting over the next 12 months or were unsure how recruitment would go. Registered settings cited a lack of qualified and quality applicants as the key issue making recruitment difficult.

Childminders and accredited nannies

- In the latest year, registered childminders generally reported higher levels of stress than in the previous year and were generally less satisfied with their jobs when compared to accredited nannies.
- Registered childminders rated 'job security' and 'influence over job' particularly low in the latest year (giving average ratings of 4.0 and 4.6 out of 10.0 respectively).
- 'Respect from parents' was the most highly rated aspect of the childcare role by both registered

childminders and accredited nannies for the second consecutive year.

- In 2024, more than a quarter of registered childminders said they had considered a move out of the sector altogether and a third said they were unsure about their future as a childcare professional.
- Nannies were more positive about their future, with 50% saying they were happy in their current roles and only 14% saying they had considered a move outside of the sector.
- The most commonly cited reasons for considering a change in role were 'concerns around job security', inflexible ratios' and 'Jersey's parents wanting more flexibility than can be offered'.

Fees charged and provider finances

- The average fee charged per child (of all ages) by registered settings (excluding childhood settings) was £9.80 compared to £9.10 for childminders.
- For the second consecutive year, 100% of registered settings (excluding childhood settings) reported that they had raised their prices, compared to just over half of registered childminders and three-quarters of childhood settings .
- In Jersey, fees charged to parents are around 50% higher than in England as a whole and 12% higher than in London (where fees charged to parents are significantly higher than across the rest of the country); fees charged by childminders are 30% higher in Jersey than in London.
- The largest outgoings for registered settings are employee salaries followed by facilities (i.e. rent/mortgage payments and property maintenance) and materials; for childminders the largest outgoings are social security and ITIS payments followed by materials and petrol/parking.
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- 40% of all providers said they had outgoings that were threatening the sustainability of their business; continued rises to inflation/prices was the most commonly cited issue threatening sustainability.
- Virtually all registered settings said they expected to continue providing services in 2025; only one setting said it was unsure about its future.
- Around nine out of ten registered settings reported paying all employees a 'living wage', a higher proportion than estimated in 2023.
- Less than 10% of providers said the profitability of their business had increased in the last year.

Multi-lingual learners

- Around a fifth (19%) of children booked to attend early childhood education and care settings were multi-lingual learners; this ranged from 8% of children in the care of a childminder to 33% in Government of Jersey school nurseries.
- Only a small proportion of accredited nannies and registered childminders reported speaking **common** additional languages such as Portuguese or Polish with the children in their setting; 0% of registered settings reported talking additional languages with the children in their care.

Key issues

- For the second year, ‘attracting childcare professionals to work in the sector’ was the top issue identified by childcare and early years practitioners.
- In 2024, ‘meeting the needs of children’ and ‘the health and wellbeing of childcare practitioners’ were the next most important issues.

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1. Introduction

The Early Childhood Education and Care Survey 2024 has been commissioned by the Best Start Partnership. The administration of the survey, the analysis of data and reporting of findings has been undertaken by 4insight Ltd, a local and independent research agency. The survey was administered to Jersey based childcare and early years providers in December 2024 reflecting the second consecutive year the survey has been undertaken.

The Childcare and Early Years Providers survey was sent to all Government of Jersey school nurseries, registered settings (private, charity-led and not for profit day nurseries as well as private school nurseries), registered childminders, accredited nannies and childhood settings (registered breakfast/after-school/holiday and activity clubs in Jersey providing wrap around care for children aged 3 to 4 year olds).

In 2024, there have been two main changes to the survey coverage: Government of Jersey school nurseries have been included in the survey in 2024 to capture information not already held by the Childcare and Early Years Service. In addition, the coverage of childhood settings has been reduced to focus on the small number of settings offering wrap around provision for children aged 3 to 4 years (pre-school age).

In Jersey, there is no statutory requirement for nannies to become accredited and so the results shown for this provider type reflect only those practitioners who have chosen to follow an 'accreditation route' with the Jersey Child Care Trust.

The overall response rate was 56% of all early education and care providers who responded to the survey. The response rate ranged from 33% for accredited nannies to 81% for Government of Jersey school nurseries.

To provide estimates of the overall number of children attending childcare or early years settings and the number of childcare practitioners, survey data has been 'grossed up' using already existing data on the number of providers registered with the Childcare and Early Years Service and the number of children registered to each provider.

All figures presented in this report have been calculated independently and rounded to the nearest 10 (excluding the number of providers that reflect unrounded numbers). For this reason, figures in graphs and tables may not sum exactly to overall total figures.

2. Number of providers and their characteristics

Number of providers

At the time of the survey (December 2024), the total number of childcare and early years providers in Jersey was 128. This number includes Government of Jersey school nursery classes, registered settings (private, charity-led and not-for-profit day nurseries as well as private school nurseries) and childhood settings (offering wrap around care for children aged 3 to 4 years) and registered childminders. It also includes accredited nannies who are not registered to care for children like other provider types.

Table 1: Number of childcare and early years provider, 2024

	2023	2024
Government of Jersey school nurseries	21	21
Registered settings	34	35
Registered childminders	45	46
Accredited nannies	34	27
Total	134	129

****The way providers are classified and the range of survey providers sampled has changed in 2024. This means that figures presented in Table 1 are not comparable between the 2023 and 2024 reports***

Across 2024, there has been very little change in the number of childcare or early years providers offering services in Jersey. The number of accredited nannies fell from 34 in 2023 to 27 in 2024 however the number of all other provider types remained relatively static.

One private day nursery did close its doors in 2024 however a new registered setting was opened as a pilot project.

Whilst registration data shows that the number of registered childminders declined from 64 in 2019 to 45 in 2023, no further decline was observed in the last year (the number of registered childminders increased by 2% in 2024). In contrast, England observed further decline of 13% across the same period.

3. Number of childcare places and capacity

This section provides information on the number of childcare places that providers are registered for with the Childcare and Early Years Service, the number of children they have filling those positions (headcount) and the number of surplus childcare places/sessions they have available. This section only includes data for those providers offering full-time (or term-time) day provision i.e. Government of Jersey school nurseries, registered childminders, registered settings (private, not-for-profit and charity-led day nurseries as well as private school nurseries) and accredited nannies. Childhood settings offering wrap around care for children aged 3 to 4 are therefore not included.

Number of registered places

The number of registered places is the maximum number of children a provider is allowed to look after at any one time in accordance with their registration criteria agreed with the Childcare and Early Years Service. For Government of Jersey school nurseries and registered settings, the registered number of children refers to children aged under 5 years (i.e. pre-school age children). For registered childminders, the registered number of children can also include children of school age who they are registered to look after before/after school.

In December 2024, it was estimated that there were **2,270** term-time or all year round registered places for children aged under 5 years. This number does not include accredited nannies who are not registered for childcare places like other provider types.

Figure 1: Number of registered places for children by provider type: 2024

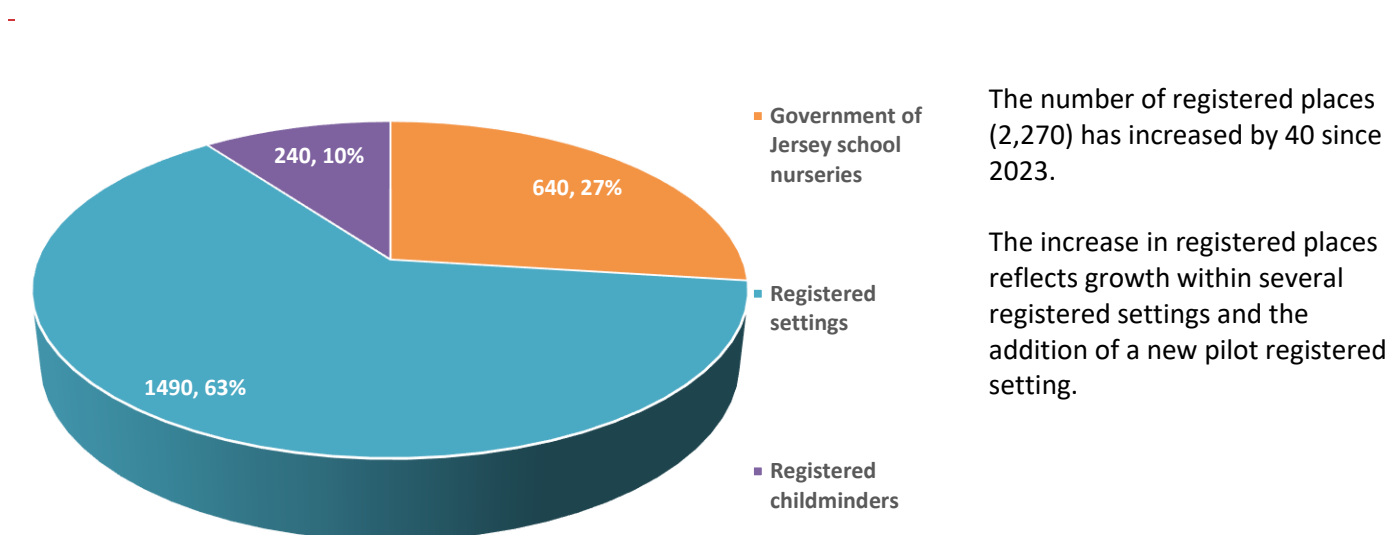


Table 2: Mean number of registered places for children aged under 5 years by provider type, 2024

Provider type	Jersey 2023	Jersey 2024	England 2024
Government of Jersey school nurseries	31	31	39
Registered settings	52	53	53
Registered childminders (can include children of school age)	5	5	7

In 2024, the mean number of registered places for children aged under 5 years per provider was relatively unchanged compared to in the previous year and remains significantly lower than in England for registered childminders and Government of Jersey school nurseries. It should be noted however that childminders in England can work together or employ assistants without registering as a group setting and are therefore able to care for a greater number of children.

Statistics for England referenced from [Childcare and early years provider survey, Reporting year 2024 – Explore education statistics – GOV.UK \(explore-education-statistics.service.gov.uk\)](https://www.gov.uk/government/statistics/childcare-and-early-years-provider-survey-reporting-year-2024)

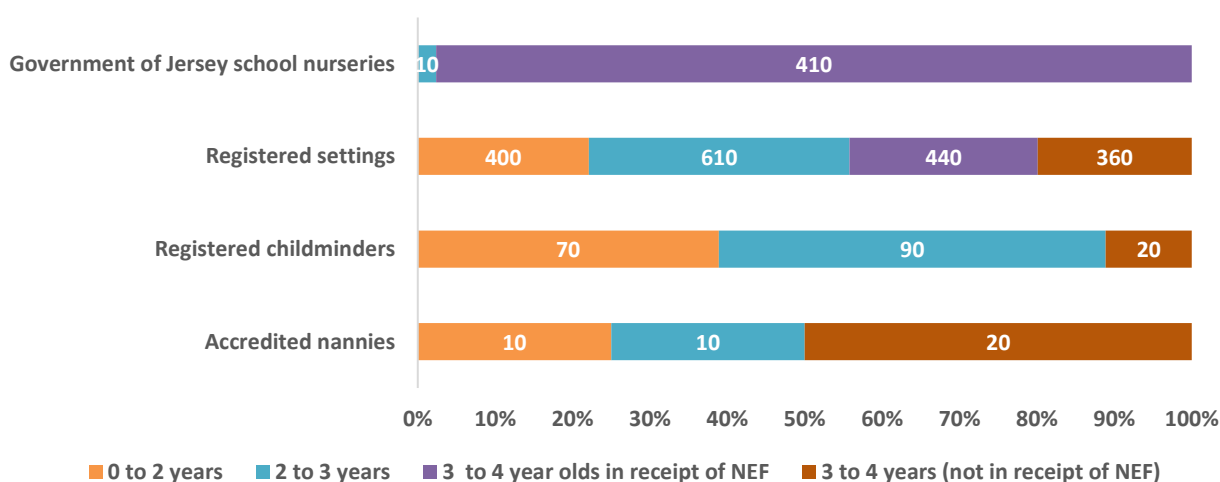
Number of filled places

The number of filled places refers to the number of children booked with each provider i.e. the headcount. At any one given time, the number of filled places should not exceed the number of registered places. It is possible for 2 or more part-time attendees to take one registered place if they attend on different days/sessions.

At the time of the survey, it was estimated that there was a total of 2,220 children booked to attend childcare and early years settings (at Government of Jersey school nurseries, private, charity or not-for-profit day nurseries as well as private school nurseries, registered childminders and accredited nannies). This number has risen marginally since 2023.

**It should be noted that a significant number of these children do not attend childcare and early years settings on a full-time basis.*

Figure 2: Number of children booked to attend childcare and early years settings by provider type and age of child, 2024



Children attending registered childminder settings have a younger age profile. In 2024, 89% of children booked to attend with registered childminders were aged 0 to 3 years. In comparison, with accredited nannies and registered settings, around half of all children booked to attend were aged 3 to 4 years.

Capacity

Providers were asked whether they had the capacity to care for any more children during the last working week they were open i.e. they had registered places/sessions that weren't filled and they were willing/able to take on additional children.

More than half of all providers reported having some capacity to care for additional children aged under 5 years (this does not necessarily reflect full-time places for children of pre-school age and could be for certain days/sessions only). Government of Jersey school nursery classes had the greatest capacity to care for additional children, with 90% of these providers reporting to have additional capacity, equating to 220 unfilled places. This reflects an increase in Government of Jersey school nursery capacity since 2023. It should be noted that Government of Jersey school nursery places reflect term-time places.

Table 3: Number of unfilled places/sessions by provider type: 2024

	0 to 2 years	2 to 3 years	3 to 4 years	All children aged 0 to 4 years
Government of Jersey school nurseries			220	220
Registered settings	60	40	20	120
Registered childminders	20	30	20	70

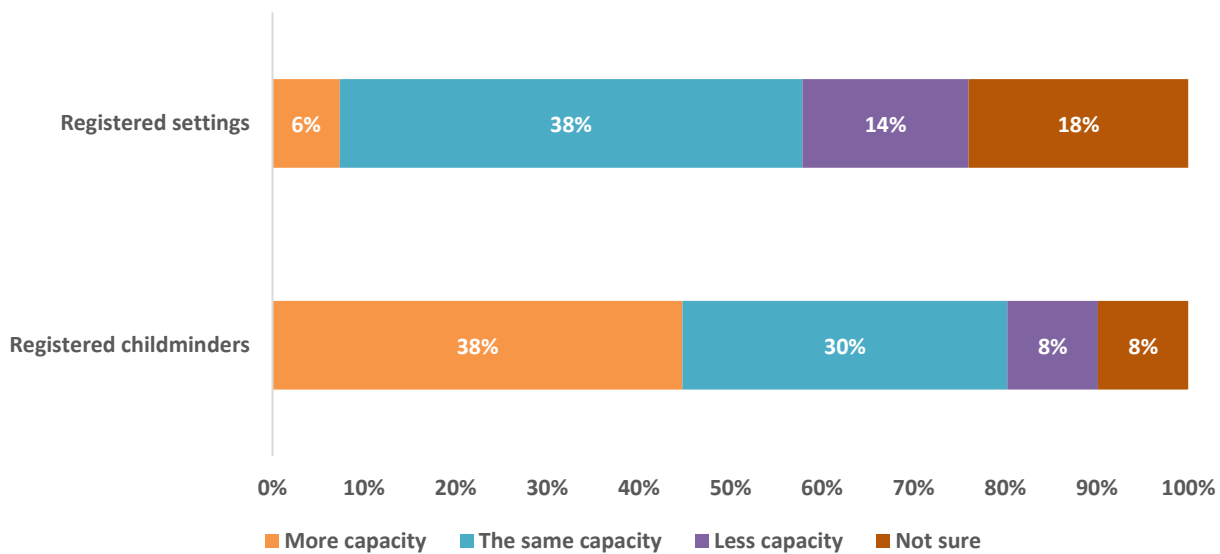
**It should be noted that unfilled places do not necessarily reflect full-time places for children aged under 5 years and could reflect registered places that are only unfilled on certain days of the week or certain sessions.*

In 2024, registered settings reported around 100 unfilled places for younger children (aged under 3 years). Capacity to care for additional children aged 3 to 4 was minimal within this setting type with only 20 unfilled places/settings estimated to exist for children aged 3 to 4 years.

At the end of 2024, registered childminders reported significantly more capacity to care for younger children (aged under 3 year) than in the same period of 2023. In the latest year, more than half of childminders reported some capacity to care for additional children aged 0 to 4 years and around 40% said they thought they would have more capacity again by September 2025.

In comparison, only a small proportion of registered settings (6%) said they expected to have more capacity by September 2025.

Figure 3: Do you expect to have more or less capacity to care for additional children by September 2025?



Capacity to care for additional children aged under 5 varies by age group; across the sector there is significantly more capacity to care for children approaching school age (i.e. aged 3 and 4 years) due to the additional capacity in Government of Jersey school nurseries. At the time of the survey there were around 150 unfilled places/sessions for children under 3, compared to almost double that number available for children aged 3 to 4 years.

When looking at capacity by session type it was evident that both registered settings and childminders have

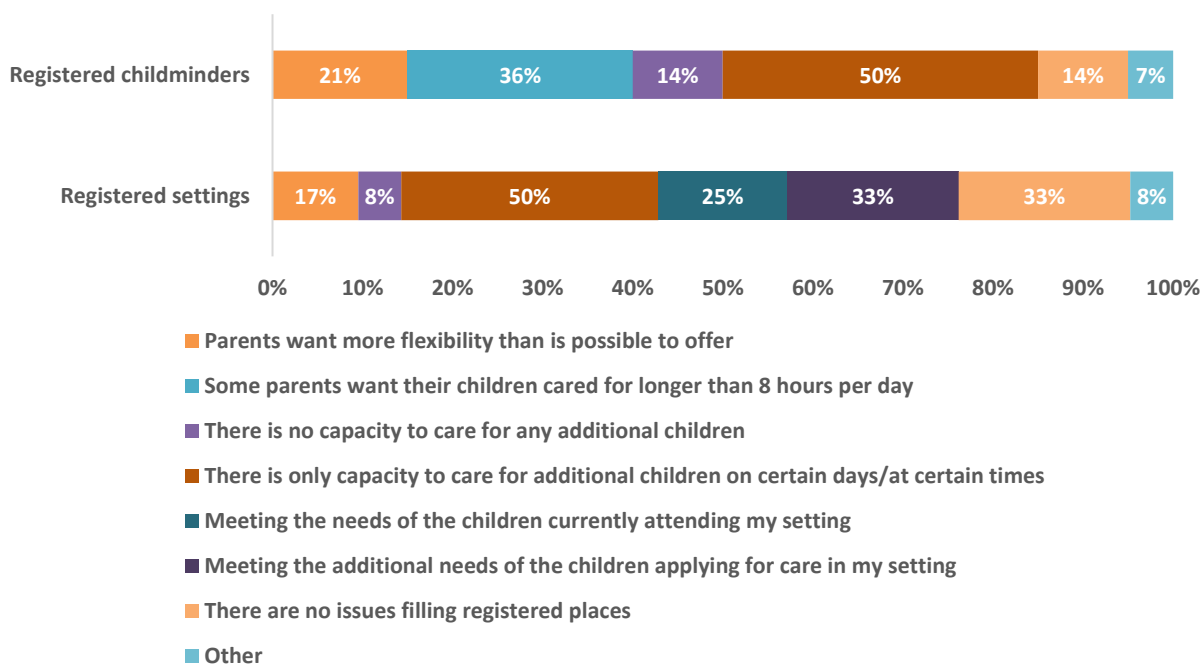
more capacity to care for additional children during full day sessions or in the afternoons. Very few providers have capacity to care for additional children during the morning sessions only.

Registered childminders had significantly more capacity in the latter half of the week (i.e. during Thursdays and Fridays) than at the beginning of the week, whilst registered settings reported similar levels of capacity throughout the week.

Both registered childminders and registered settings were asked whether they had difficulties filling their registered places for children aged under 5 years. In the latest year, a third of registered settings reported having no difficulties compared to around 14% of registered childminders. This is a different picture than in 2023 when around half of both provider types said they had no issues filling their registered places.

The most common reason cited for having difficulties filling registered places was ‘only having capacity to care for additional children on certain days and at certain times’. Some providers commented that it was becoming increasingly difficult to accommodate parents who only wanted their children cared for during a small number of sessions across the week in order to reduce costs. Providers suggested that many parents were now choosing to rely on friends and family to care for their children for at least part of the week, making it difficult for providers to fill their ‘full-time’ places. In addition, several nurseries commented that difficulties finding reliable and high quality staff were impacting their ability to fill their registered places.

Figure 4: What difficulties do you have filling your registered places? (Respondents could tick more than one option)



4. Workforce

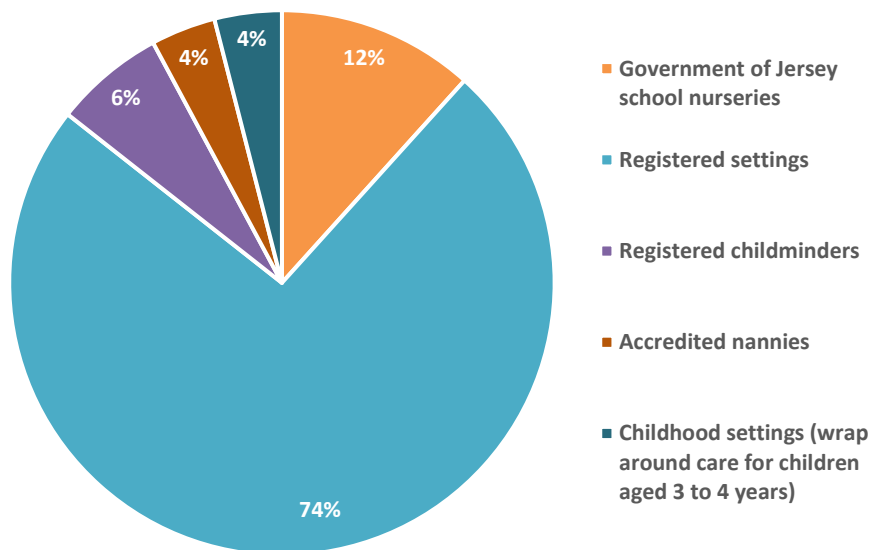
In this section information is provided about the number of employees working in the childcare and early years sector as well as providing key insights into employee turnover and the number of current vacancies.

Number of employees

At the end of 2024, it was estimated that there were 670 people working directly with children aged under 5. In addition, there were a further 30 employees working with children aged 0 to 4 years in childhood settings (wrap around provision for children aged to 3 to 4 years). This number excludes those employees working in managerial or other positions that are not directly involved in the care of children (and those working within Government of Jersey school nursery classes).

The number of people working within childcare and early years settings is estimated to have increased by 7% in 2024. The increase in childcare and early years employees was mirrored in England in 2024, where the estimated number of childcare staff has increased by 6%.

Figure 5: Proportion of the childcare and early years workforce by provider type, 2024



Across all providers, around 80% of practitioners were found to be working full-time hours. In 2024, only nursery settings reported employing voluntary staff; 3% of part-time positions within nursery settings were filled by employees working on a voluntary basis.

The mean number of total employees per provider has increased within registered settings in the latest year from 17 in 2023 to 19 in 2024. There has also been an increase in the proportion of employees on full-time contracts rather than part-time.

Table 4: The average number of employees by provider type (group based providers), 2024

	2023	2024
Government of Jersey school nurseries	x	4
Registered settings	17	19

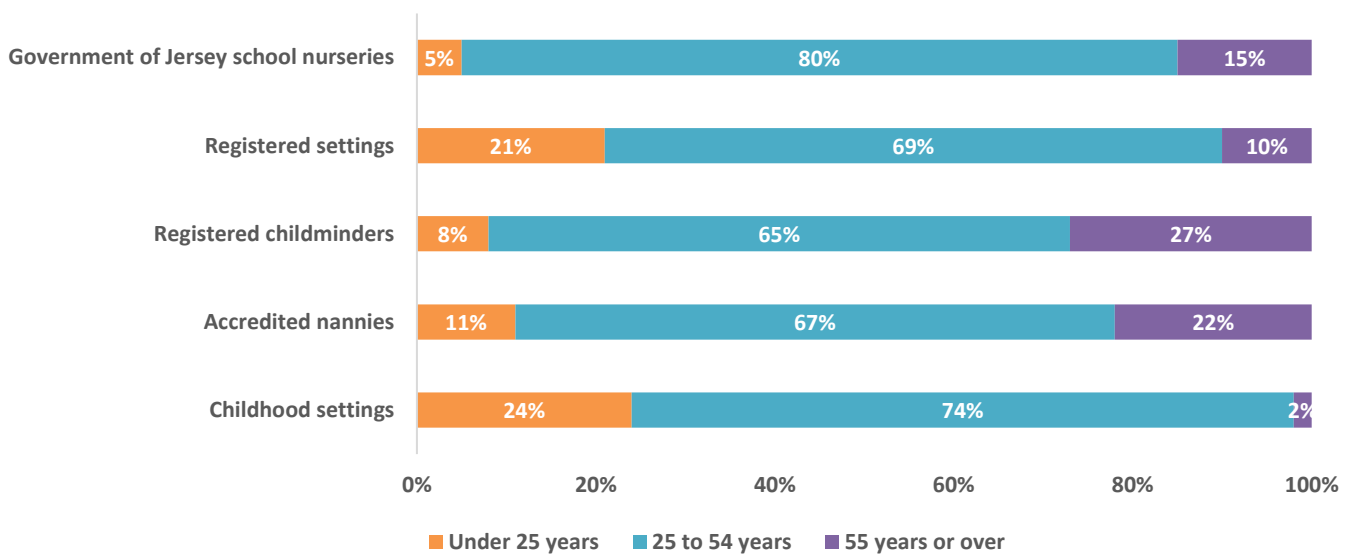
The average number of paid employees per registered setting continues to be considerably higher in Jersey compared to England.

As the number of registered places per group setting is similar in Jersey and England, this suggests a lower ratio of children to each employee in Jersey.

Statistics for England referenced from [Childcare and early years provider survey, Reporting year 2024 – Explore education statistics – GOV.UK \(explore-education-statistics.service.gov.uk\)](https://www.gov.uk/explore-education-statistics)

Age range

Figure 6: Age profile of childcare and early years practitioners, 2024



A younger age profile is apparent for employees working in registered settings; more than 20% of all employees working in registered settings and childhood settings were under the age of 25. In comparison, only 5% of employees within Government school nurseries were reported to fall into this younger age category.

In the latest year more than a quarter of registered childminders reported being over the age of 55.

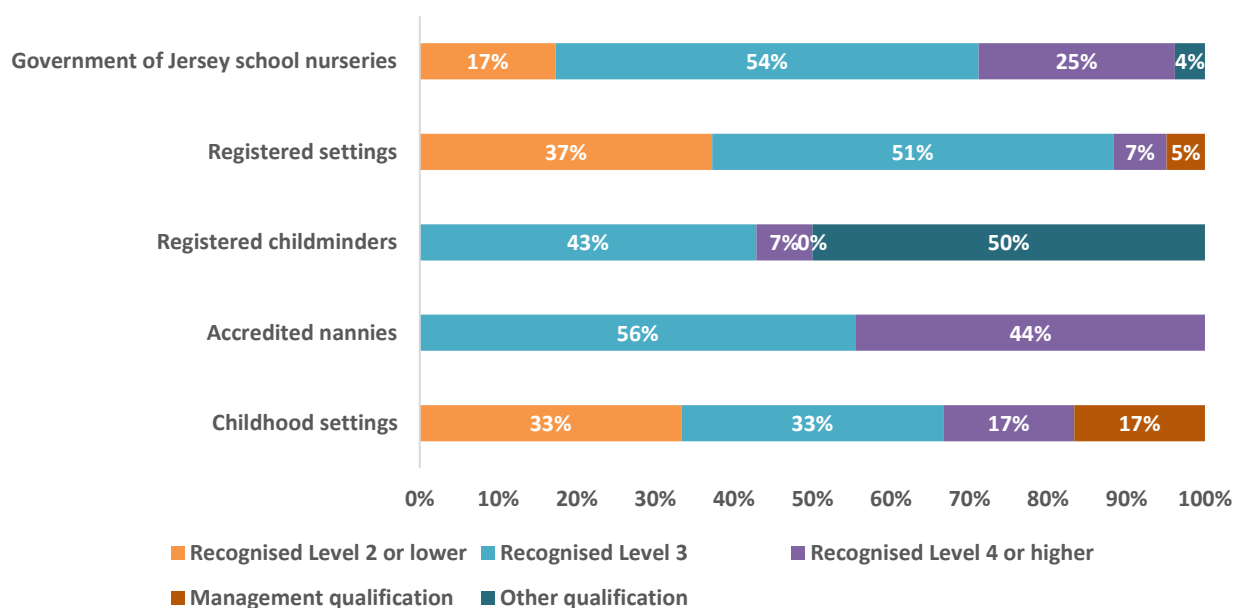
Highest level of qualification

Childminders and accredited nannies were asked about their highest level of qualification and group-based providers (Government of Jersey school nurseries, registered settings and childhood settings) were asked about the qualification profile of their employees.

For the second consecutive year, accredited nannies were found to be the most highly qualified of childcare and early years providers, with more than 40% of accredited nannies reporting to hold a Level 4 qualification or higher.

In comparison, around a third of employees in registered settings (were reported to hold a Level 2 qualification or lower. This is likely to be associated to the younger age profile of employees in these setting types.

Figure 7: Highest level of formal qualification held by childcare and early years practitioners, 2024



Employee turnover

The overall employee turnover across all group settings (Government of Jersey school nurseries and registered settings) was 11% in 2024. Employee turnover ranged from 8% in childhood settings to 14% in nurseries.

It was worth noting that the employee turnover rate remains similar to in England. In the latest year, employee turnover for group-based providers (private and voluntary settings) in England was 16%.

Table 5: Childcare employee turnover rates (group based providers), 2024

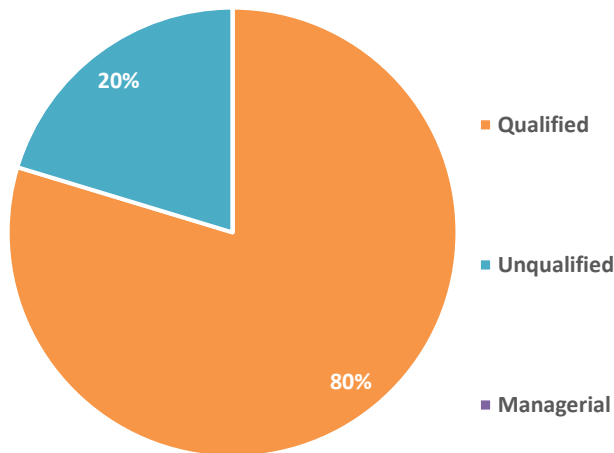
	Turnover rate
Government of Jersey school nurseries	10%
Registered settings	14%
Childhood settings	8%

Vacancies

In 2024, the number of open vacancies reported by registered settings fell by more than a third.

Across all group settings (Government of Jersey school nurseries, nurseries and childhood settings), the number of open vacancies reported in 2024 was 64.

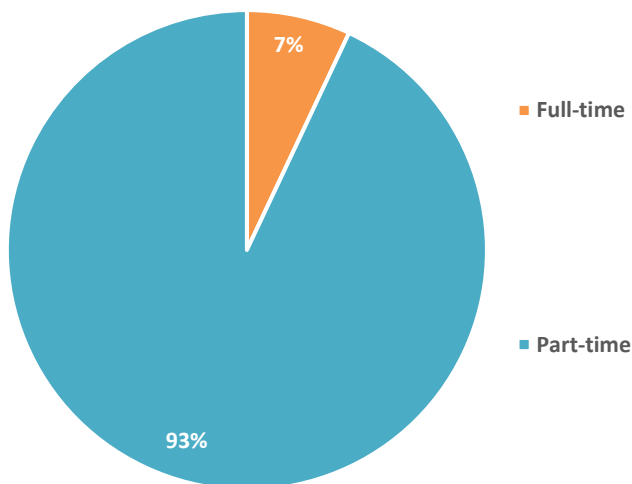
Figure 8: Vacancies within all group based settings by qualification type, 2024



Across all group settings, 80% of open vacancies reflected qualified positions.

Twenty percent of open vacancies reflected unqualified positions (reflecting a desire to recruit 0 hours bank staff predominantly). For the second consecutive year, no managerial vacancies were reported by group-based providers.

Figure 9: Vacancies within all group based settings by contract type (full-time/part-time), 2024



Almost all reported vacancies across group-based providers reflected part-time positions.

Only a small number of nursery settings reported having full-time positions available.

Nine out of ten (89%) group settings with open vacancies said they thought they would have trouble recruiting over the next 12 months and 11% said they were unsure. No group-based provider said they thought they would have no difficulties in recruiting to open positions.

Many providers cited difficulties in attracting quality Level 3 employees to their setting with particular reference to the challenging cohorts of children currently in attendance. Many providers suggested that qualified professionals were either moving out of the profession altogether or moving into Government of Jersey roles. There were also comments about talent leaving the island i.e. students leaving to go to university and not returning or leaving the island altogether due to challenges with the cost of living.

When asked about their recruitment practices, all registered settings with vacancies said they were recruiting on island. A third said they were recruiting for at least one position off-island and 40% said they were considering this as an option.

Table 6: How are you recruiting to your current vacancies? (Respondents could pick more than one option)

	Recruiting on-island	Recruiting off-island	Considering recruiting off-island
Registered settings	100%	29%	43%

Registered settings were asked about the benefits offered to employees to support their wellbeing. Of those that responded, 60% said they had a policy on employee health and wellbeing and a further 40% said they had an employee healthcare plan. Only 10% of registered settings said they had a policy on flexible working and 30% said they provided no health and wellbeing benefits.

Nine out of ten (93%) of registered settings said they offered a living wage to all employees. Whilst Government of Jersey school nurseries were not asked this question, it is known that all employees working in Government of Jersey school nurseries are offered a living wage.

Of those that said they didn't offer a living wage to all employees, the primary reason given was the impact it would have on fees charged to parents.

5. Registered childminders and accredited nannies: Wellbeing & job satisfaction

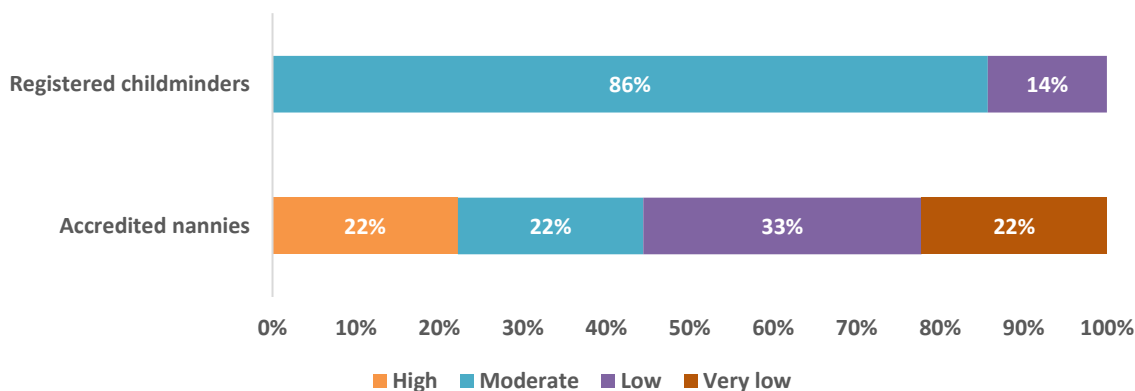
Registered childminders and accredited nannies were asked about their levels of stress and how satisfied they were with different aspects of their jobs. They were also asked about whether they had considered leaving their role over the last 12 months and if they had, why this was.

Wellbeing

When asked about their current levels of stress, only 22% of accredited nannies and 0% of childminders reported high levels of stress, reflecting a similar picture to 2023.

Whilst no registered childminders who responded to the survey reported high levels of stress, 86% of them reported moderate levels of stress. This proportion has increased significantly since 2023 when 39% of childminders reported moderate levels of stress.

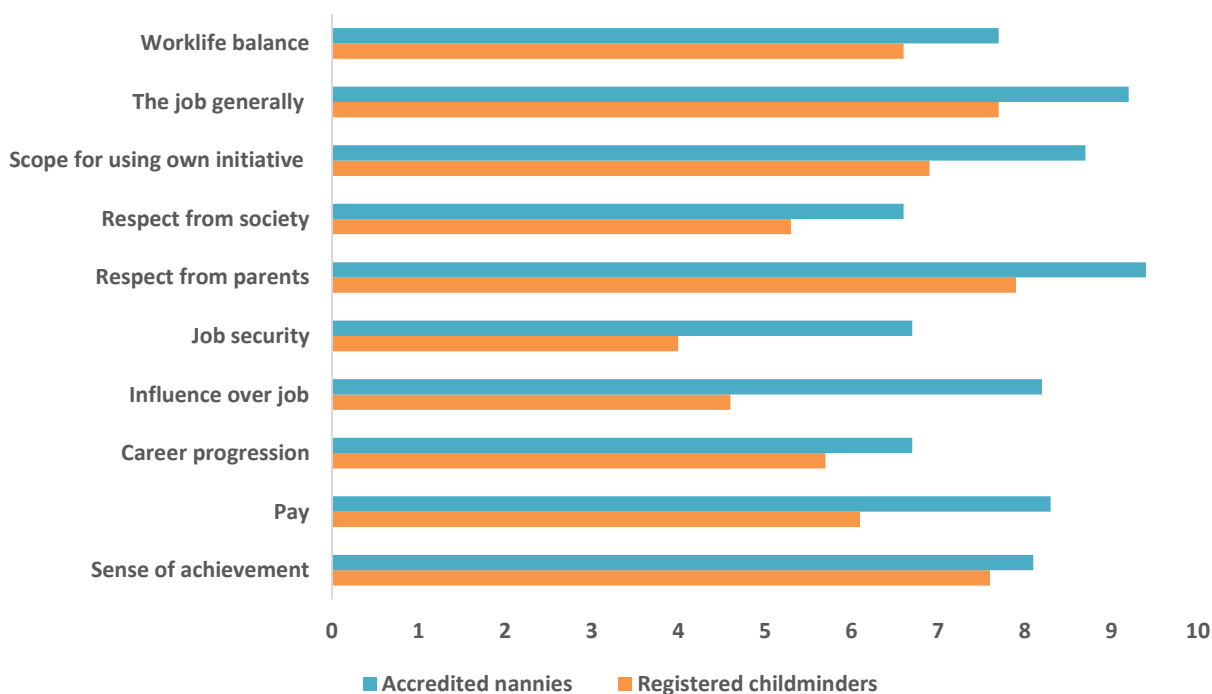
Figure 10: Self-reported levels of stress by registered childminders and accredited nannies, 2024



Job satisfaction

Figure 11 below presents the ratings provided by childminders and accredited nannies with regards to their satisfaction with certain aspects of their job. Practitioners were asked to rate each aspect on a scale of 0 to 10 where 0 was very unsatisfied and 10 was extremely satisfied.

Figure 11: Average ratings of satisfaction provided by registered childminders and accredited nannies, 2024



In 2024, accredited nannies rated all aspects of their job more highly than registered childminders on average. This is a different picture to that of 2023, when childminders were in general more positive about their levels of job satisfaction.

Registered childminders rated ‘job security’ and ‘influence over job’ particularly low in the latest year (giving average ratings of 4.0 and 4.6 out of 10.0 respectively). In 2023, childminders rated these aspects of their job significantly higher. Lower average ratings provided for ‘job security’ and ‘influence over job’ could be in part associated to increased number of unfilled places recorded by childminders in the latest year and the expectation that capacity may increase again by September 2024. Increased regulation was also a prominent theme mentioned by childminders throughout the survey.

Across all provider types, the most highly rated aspects of the job were ‘respect from parents’, ‘the job generally’ and ‘scope for using initiative’. These were also the most highly rated aspects of the job by both provider types in 2023.

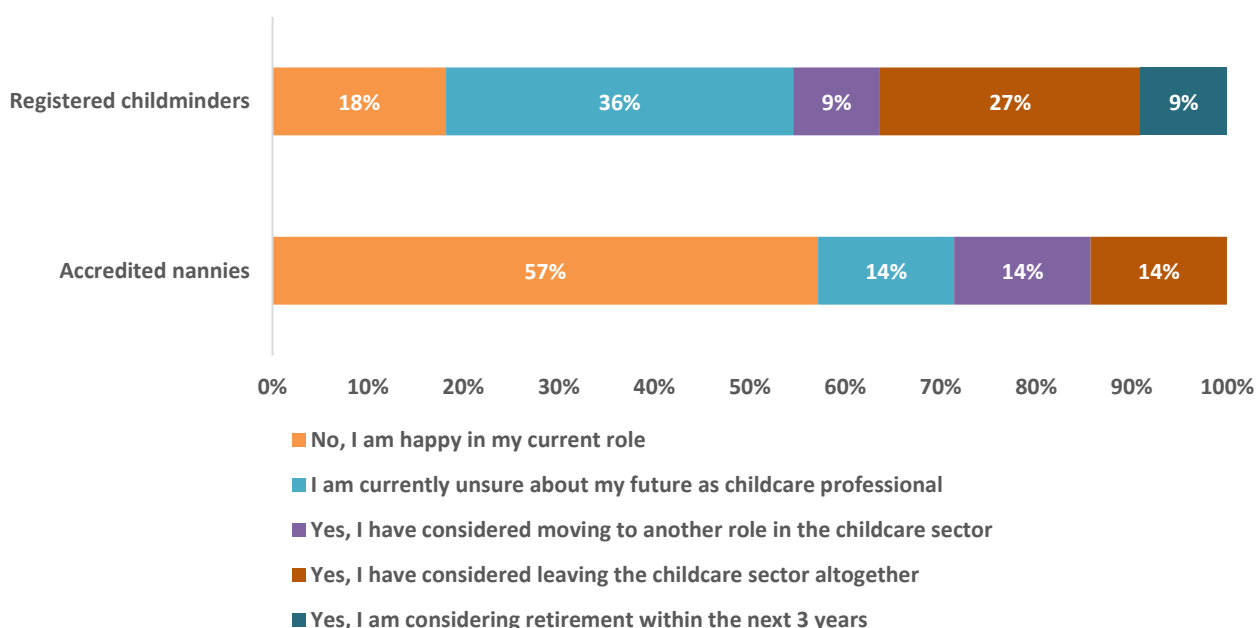
Sustainability

Registered childminders and accredited nannies were asked whether they had considered leaving their current role in the last 12 months.

Again, accredited nannies were more positive than registered childminders in 2024, with more than half of nannies reporting they were happy in their current role and not considering a change. Around 14% said they had considered moving to a role outside of the sector in the last 12 months. This is a similar proportion to in the previous year.

In comparison, the picture for registered childminders has changed since 2023. In the latest year, around 20% of childminders said they were happy in their current role compared to 80% the previous year. In 2024, more than a quarter of childminders said they had considered a move out of the sector altogether and a third said they were unsure about their future as a childcare professional.

Figure 12: Have you considered leaving your current role in the last 12 months?



When registered childminders and accredited nannies were asked why they had considered leaving their role as a childcare practitioner, the most common reason cited was ‘concerns around job security’ which was mentioned by the majority of respondents. ‘Inflexible ratios’ and ‘Jersey’s working parents needing more flexibility than can be offered’ were other key themes raised.

6. Childcare fees, provider finances and profitability

This section describes average fees charged to parents by childcare providers and provides an overview of provider finances and current and anticipated profitability.

Average fees

In the first year the survey was run (2023), average fees charged by childminders and nurseries were similar however in the latest year, nurseries have increased their fees more than other provider types and as a result they are now £0.80 more expensive per hour on average than registered childminders.

Average fees vary by age of children and provider type. Fees charged to parents for the care of children aged under 2 are significantly higher in nursery settings than in childminder settings. The average fees charged by nurseries and childminders for the care of children aged 2 to 3 is more similar.

Table 7: Mean hourly fees charged to parents by provider type and age of child, 2024

	Children aged under 2 years	Children aged 2 to 3 years	Children aged 3 to 4 years	Average fee (all ages)	Average change in fees 2023 to 2024
Registered settings	£10.30	£9.50	x	£9.90	↑ £1.10
Registered childminders	£9.10	£9.00	£9.00	£9.10	↑ £0.30
Childhood settings	x	x	£6.70	£6.70	↑ £0.50

In Jersey the average rate charged per hour by childhood settings (i.e. for holiday and wrap around care) was £6.70 reflecting an increase of £0.50 since 2023.

Average fees charged to parents are almost 50% higher than across England as a whole and around 12% higher than in London (where fees charged for childcare are significantly higher than across the rest of the country). In Jersey, fees charged by childminders are more than a third higher than in London.

Statistics for England referenced from [Childcare and early years provider survey, Reporting year 2024 – Explore education statistics – GOV.UK \(explore-education-statistics.service.gov.uk\)](https://www.gov.uk/explore-education-statistics)

Many accredited nannies reported earning an annual salary rather than charging parents an hourly fee per child. Salaries earned by accredited nannies can also cover additional duties such as housework, cooking, etc. Annual salaries earned by accredited nannies ranged from £18,000 to £38,000 per annum.

Table 8: Percentage of providers reporting to have raised their fees over the last 12 months, 2024

	Percentage of providers reporting to have raised their fees
Registered Settings	100%
Registered childminders	56%
Childhood settings	74%

For the second consecutive year, 100% of registered settings that responded to the survey reported that they had raised their fees over the last 12 months. This compares to 74% of childhood settings and 56% of registered childminders.

Provider finances

In 2024, registered settings and childminders were asked to order expenditures from largest to smallest. This reflects a change from 2023, when providers were asked what proportion of their outgoings was attributed to each expenditure.

Results showed that the greatest outgoings for registered settings were employee salaries followed by facilities (i.e. rent/mortgage payments and property maintenance) and materials. In comparison, the biggest outgoing for childminders were social security and ITIS payments followed by materials and petrol/parking.

Providers were asked whether they had any outgoings that were threatening the sustainability of their business. Approximately 40% said yes. Continued rises to inflation/prices in general was the most commonly cited issue threatening the sustainability of childcare providers. Other common issues included increases to rents in Jersey.

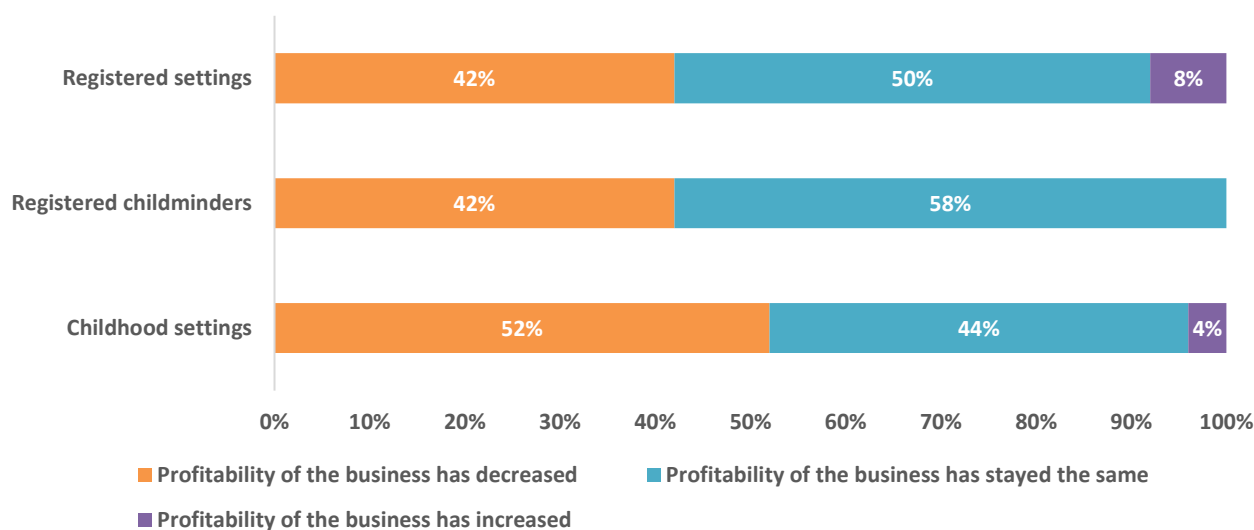
Table 9: Top 5 largest outgoings by provider type, 2024

	1 (largest expenditure)	2	3	4	5
Registered settings	Employee salaries	Facilities (i.e. rent/mortgage payments, property maintenance)	Materials	Meals, snacks and other refreshments	Memberships/outings
Registered childminders	ITIS/Class 2 contributions	Materials	Petrol/parking	Meals, snacks and other refreshments	Insurance
Childhood settings	Employee salaries	Facilities (i.e. rent/mortgage payments, property maintenance)	Materials	Meals, snacks and other refreshments	Insurance

Profitability

Childcare and early years providers were asked whether the profitability of their business had changed over the 12 months. Figure 13 below shows that no registered childminders and only a small percentage of registered settings and childhood settings (less than 10%) reported that the profitability of their business had increased in the latest year. Registered settings and registered childminders were more negative about their profitability in 2024 compared to 2023.

Figure 13: How has the profitability of your business changed over the 12 months? 2024



When asked about their expectations for future profitability, registered childminders were not as positive as other provider types with almost a third expecting their profitability to decline further over the next 12 months. In comparison, almost all registered settings said they expected their profits to stay the same or increase over the next year.

Registered settings and childhood settings were asked whether they expected to continue providing childcare services in 2024. All childhood settings and the majority of registered settings said yes, they expected to continue providing services in 2025. Only one registered setting reported ‘uncertainty’ about their future.

7. Multi-lingual learners

This section provides information on multi-lingual learners which are defined as children who speak more than language at home, for example English and Portuguese. All providers of children aged 0-4 (excluding childhood settings) were asked what percentage of the children booked into their setting were multi-lingual learners. They were also asked whether practitioners in their setting spoke any additional languages (to English) with the children in their setting.

Table 10: Percentage of children who are multi-lingual learners by provider type, 2024

	2024
Government of Jersey school nurseries	33%
Registered settings	16%
Registered childminders	8%
Accredited nannies	15%
Childhood settings	28%
All providers	19%

Across all provider types, the percentage of children booked to attend childcare and early years settings that were multi-lingual learners was 19%. The percentage of multi-lingual learners being cared for by a registered childminder, was lower than that booked with other provider types. This picture was similar to in 2023. In Government of Jersey school nurseries, a third of children were multi-lingual learners.

Across all settings, the most common languages spoken by children (at home), in addition to English, were Portuguese, Polish, French and Romanian.

When asked about the languages practitioners spoke with the children in their care, only a small number of accredited nannies and registered childminders reported speaking second languages in their setting that aligned with those spoken by children at home. Other languages spoken in childminder and accredited nanny settings included French and Spanish. No group settings (Government of Jersey school or registered settings) reported speaking common second languages such as Portuguese or Polish in their setting.

8. Top issues

All providers were asked what they thought the top issues are facing their industry over the next three years.

Table 11: What do you think are the top issues facing the childcare sector over the next 3 years? 2023 vs 2024 (issues are ranked from 1 to 11 where 1 is the most important issue and 11 is the least important issue)

	2023	2024	Position change 2023 to 2024
Attracting childcare practitioners to work in the sector	1	1	No change
Meeting children's needs	3	2	↑1
Health and wellbeing of childcare practitioners	8	3	↑5
Employee recruitment	4	4	No change
Running costs	2	5	↓3
Meeting parent's expectations	5	6	↓1
Employee retention	7	7	No change
Regulatory requirements	6	8	↓2
Commitment to CPD	9	9	No change
Other	10	10	No change
Succession planning	11	11	No change

For two consecutive years, 'Attracting childcare professionals to work in the sector' was top issue identified by childcare and early years practitioners. In the latest year, 'meeting the needs of children' and 'the health and wellbeing of childcare practitioners' were other important issues.

The top issue varied by provider type. In 2024, registered settings identified 'employee recruitment' as the top issue facing their sector over the next three years, whilst Government of Jersey school nurseries identified 'meeting the needs of children' as the most pressing concern.

Similarly, registered childminders highlighted 'regulatory requirements' as the most important issue facing their industry over the next 3 years whilst accredited nannies identified 'attracting childcare and early years practitioners' as the key issue.

Appendix A: Background notes

Methodology

In December 2024, all Government of Jersey school nurseries, registered settings (private, charity-led and not-for-profit day nurseries as well as private school nurseries), registered childminders, accredited nannies and childhood settings (breakfast/after-school, holiday and activity clubs providing wrap around care for 3-4 year olds) were invited to take part in the survey.

The survey adopted an 'online first' approach in order to save material waste and reduce survey administration costs. Initially all practitioners were sent an email inviting them to complete the survey online. The online survey was administrated using Snap XMP technology. Reminder emails were sent to encourage non-respondents to take part in the survey, and some nurseries were contacted by telephone to offer them support in providing their data.

Response rate and weighting

The overall response rate to the survey was 56 per cent equating to almost 100 completed surveys. The response rate ranged from 33% of accredited nannies to 81% of Government of Jersey school nurseries who participated in the voluntary survey. To estimate figures that reflected the entire sector (and not just the survey respondents) such as the overall number of children attending the different setting types or the overall number of staff working across the sector, responses from the survey were 'grossed up' using an appropriate weighting factor. Grossing weights were established using pre-existing data held by the CYPES department on the number of registered providers and the number of children they are registered to care for.

On analysis of the data, it was found that larger registered settings were more likely to have responded to the survey than smaller settings (i.e. nurseries registered to care for less than 50 children). To compensate for this non-response bias and ensure that the findings reflected the views of all registered settings, data provided by registered settings was also weighted by size (i.e. number of registered places). Using this methodology, smaller registered settings were given a larger weight to ensure their views were reflected in the survey findings.

Definitions

Childcare and early years providers are people or organisations that provide early childhood education and childcare services to children in Jersey aged 0 to 12 years.

Government of Jersey school nurseries provide care and education for children aged 3 to 4 in the pre-school year. It should be noted however, that one Government of Jersey primary school provides places for children aged 2 to 3 years, as part of a pilot project. The majority of Government of Jersey primary schools on the island now have a nursery provision. For the first time in 2024, Government of Jersey school nursery classes were included in the survey to collect data not already held by the Childcare and Early Years Service.

Registered childminders are practitioners who have registered with the Childcare and Early Years Service to provide childminding services to babies and children aged up to 12 years old. Registered childminders are self-employed and provide childcare services from their own homes. They must meet the terms and conditions of registration such as holding relevant qualifications and undertaking ongoing training. Every year they are subject to a quality and compliance review.

Accredited nannies are those nannies who have chosen to pursue an accreditation route with the Jersey Child Care Trust (JCCT). This is not a statutory requirement of being employed as a nanny as they are not registered under any Law. Nannies are employed by a private family and work from that family's home. Their duties can also include additional responsibilities such as housework. To become an 'accredited nanny', practitioners must meet the professional standards set out by the JCCT such as the minimum qualification standard, etc.

Registered settings include private nurseries and those nurseries that are charity led or set up as not-for-profit organisations. In 2024, registered settings also included nursery classes within private schools. All registered settings included in the survey sampling frame provide childcare services for children from 0 to 4 years. All registered settings are registered with the Childcare and Early Years Service to care for a specified number of children of different ages. Registered settings must meet the terms and conditions of registration such as appropriate child to staff ratios and are subject to a quality and compliance review every two years.

Childhood settings reflect organisations who provide wrap around care for children in Jersey in the form of breakfast and after school clubs, holiday clubs and activity clubs. In 2024, the sample of childhood settings surveyed was reduced to reflect only the small number of providers who are registered with The Childcare and Early Years Service to care for children aged 3 to 4 years.

The number of registered places is the maximum number of children a provider is allowed to look after at any one time. For Government of Jersey school nurseries and registered settings the registered number of children refers to children aged 0 to 4 years only. For registered childminders, the registered number of children can also include school aged children who they are registered to look after before/after school.

The number of filled places refers to the number of children booked with a provider i.e. the headcount. At any one given time, the number of filled places should not exceed the number of registered places.

Capacity refers to registered places with a provider that aren't filled and where there is desire by the provider to care for additional children. Providers were asked whether they had the capacity to care for any more children during the last working week they were open i.e. they had registered places that weren't filled, and they were willing to take on additional children.

Multi-lingual learners are defined as children who speak more than language at home, for example English and Portuguese.