

Early childhood education and care: Jersey, 2023

The aim of this report is to provide information on childcare and early years provision in Jersey. This is the first time a survey of this nature has been administered in Jersey and results reflect a 'baseline' for the island. Specifically this survey sets out to provide important insight into the current capacity of the childcare and early years sector to educate and care for Jersey's children. In addition, this report provides a picture of the workforce and identifies the key challenges facing the childcare sector over the short to medium term.

Summary

Number of providers and their characteristics

- In 2023, there were estimated to be 196 early childhood education and care providers in Jersey including Government nursery classes, group settings (nurseries) (private, charity led and not-for-profit nurseries), childminders, accredited nannies and childhood settings (registered breakfast/afterschool, holiday and activity clubs providing wrap around and holiday care).
- Around 130 of these providers are thought to offer education and care services to pre-school age children (0 to 4 years).
- Only 3 childhood providers are thought to offer wrap around or holiday cover for children of pre-school age.
- Group settings (nurseries) (nurseries) expect to be open for greatest number of weeks across the year with an average opening of 49 weeks.

Registered places, filled places and capacity

- Whilst group settings (nurseries) make up the smallest number of providers offering care to pre-school children, the majority (62%) of registered places for 0 to 4's are within this setting type; group settings (nurseries) have on average 57 registered places for pre-school age children per setting.
- The average number of registered places per provider is higher in England than Jersey particularly for childminders; in 2023, childminders in England were registered to care for 7 children on average compared to an average of 5 registered places per childminder in Jersey. Childminders in England are permitted to employ an assistant to support with the care of a higher number of children.
- Around half of places with accredited nannies are filled by children of school age.
- In comparison, childminders generally care for younger children; half of places with childminders are filled by children aged under 2 and a further third are filled with children aged 2 to 3; group settings

(nurseries) care for more children aged 2 to 3 than any other age group.

- Across the sector there is significantly more capacity to care for children approaching school age and older than there is to care for younger children; only a small number of childminders and group settings (nurseries) reported capacity to care for additional children aged under 2 years and those aged 2 to 3.
- Eight out of ten Government nursery classes have capacity to care for additional children aged 3 to 4 (NEF year).
- Seven out of ten childhood settings (breakfast/after school, holiday and activity clubs) reported that during the last full week they were open, they had some capacity to care for additional children aged 3 to 12 years i.e. for wrap around or holiday care.
- Capacity to care for additional pre-school children was affected by day of the week and by session type; childminders and nurseries had more capacity to care for additional children in the latter half of week, Wednesday to Friday, than at the beginning of the week: nurseries had more capacity during whole day sessions and afternoons rather than mornings.
- Many providers told us that whilst their reported figures showed surplus places, many of these were reserved for children who were joining them in the coming months or who were moving up through the age groups.
- Around half of childminders and group settings (nurseries) said they had no difficulties in filling their registered places, compared to a quarter of childhood settings who said they had no issues.

Childcare and early years workforce

- Excluding those working within school nursery classes, there were approximately 1,160 people working directly with children in the early childhood education and care sector (including childminders, accredited nannies, employees in private nurseries and childhood settings).
- Across all providers, 61% of practitioners were working full-time hours.
- The average number of paid employees per group setting was higher in Jersey (17 per setting) than in England (14 per setting).
- The average turnover rate for group settings (nurseries) was 19% in 2023 and ranged from 0% to 30%; staff turnover was lower in childhood settings at 7% in 2023.
- Two thirds of group settings (nurseries) and a third of childhood settings reported having at least one employee vacancy at the time of the survey, equating to around 80 open positions.
- More than half of group settings (nurseries) and childhood settings thought they would have difficulty recruiting over the next 12 months and cited a lack of qualified applicants, difficulties recruiting qualified staff to part-time positions and unattractive salaries as the key preventative issues.

Childminders and accredited nannies

- Childminders generally reported lower levels of stress and higher levels of job satisfaction when

compared to accredited nannies.

- 'Respect from parents' was the most highly rated aspect of the childcare role by both childminders and accredited nannies; the 'lack of career progression opportunities' was the lowest ranking aspect.
- A higher proportion of accredited nannies had considered leaving their job over the last 12 months compared to childminders.
- The most commonly cited reasons for considering a change in role were 'to achieve a better work life balance' and 'job security'.

Fees charged and provider finances

- The average fee charged per child (of all ages) by childminders and group settings (nurseries) was similar at £8.80 per hour; this is a different picture in England where childminder fees charged for all ages of children were significantly lower than those charged by group settings (nurseries).
- The average fee charged by childhood providers for wrap around and holiday care was £6.23 per child per hour.
- In Jersey, childminders fees for children aged under 2 were 37% higher than those charged by childminders in England (average across all regions); fees charged by group settings (nurseries) in Jersey were 22% higher for the same age group.
- All group settings (nurseries) that responded to the survey reported they had raised their fees over the last 12 months. This compares to 75% of childhood settings, 64% of childminders and 38% of accredited nannies.
- The greatest proportion of expenditure by childminders was attributed to 'other costs' which included petrol and other driving related costs as well as memberships and activities; other significant outgoings included social security and ITIS payments as well as resources.
- Childhood settings cited staff costs as their greatest expenditure across the year; a third of childhood providers said they didn't think they would continue offering services in 2024 or were unsure as to their future, citing rising staff costs as the biggest threat to their sustainability.
- Only half of group settings (nurseries) and childhood settings reported paying all employees a 'living wage'.
- Very few group settings (nurseries) or childhood settings reported offering employees benefits such as pensions or health care plans.
- 18% of childminders said the profitability of their business had decreased in 2023 compared to 44% of group settings (nurseries) and 77% of childhood settings.

Multi-lingual learners

- Around a fifth (17%) of children booked to attend early childhood education and care settings (excluding childhood settings) were multi-lingual learners; the most common additional languages spoken at home were Portuguese, Polish, French and Romanian.

- Only a small proportion of accredited nannies and 0% of childminders and group settings (nurseries) reported speaking **common** additional languages such as Portuguese or Polish with the children in their setting.

Key issues

- Providers identified 'attracting future child-carers to the sector/employee recruitment' and 'running costs' as the key issues facing the early childhood education and care sector over the next three years.

Contents

Summary.....	1
1. Introduction.....	6
2. Number of providers and their characteristics	6
3. Number of childcare places and capacity.....	8
Number of registered places	8
Number of filled places.....	9
Capacity	9
4. Workforce.....	11
Number of employees.....	11
Age range.....	12
Highest level of qualifications	12
Staff turnover	13
Vacancies.....	13
5. Childminders and accredited nannies: Wellbeing & job satisfaction.....	15
Wellbeing.....	15
Job satisfaction	16
Sustainability	17
6. Childcare fees, provider finances and profitability	18
Average fees	18
Provider finances.....	19
Profitability	20
7. Multi-lingual learners	20
8. Top issues	21

1. Introduction

The Childcare and Early Years Providers Survey 2023, was commissioned by the Government of Jersey Children, Young People, Education and Skills (CYPES) Department in conjunction with 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 2023.

The Childcare and Early Years Providers survey was sent to all group settings (nurseries) (private, charity-led and not for profit day nurseries), registered childminders, accredited nannies and childhood settings (registered breakfast/after school, activity and holiday clubs in Jersey).

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'. In addition, Government school nursery classes were out of scope for this survey; where existing information for Government pre-schools is available regarding capacity, this has been incorporated into the report to provide an overall picture of the sector.

The response rate for each provider type was between 45% to 75%.

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 Government of Jersey CYPES department 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 and so when figures in graphs and tables are presented by category (e.g. by provider type or age of children) they may not sum exactly to overall total figures due to rounding.

2. Number of providers and their characteristics

At the time of the survey (December 2023), the total number of early childhood education and care providers in Jersey was 198. This number includes government school nursery classes, group settings (nurseries) (private, charity-led and not-for-profit nurseries), registered childminders and childhood settings who were registered to care for at least one child aged 0 to 12 years. It also includes accredited nannies who are not registered to care for children under statute like other provider types.

It was estimated at the time of the survey that around 130 providers were providing education and care services for children of pre-school age.

Table 1: Number of providers, 2023

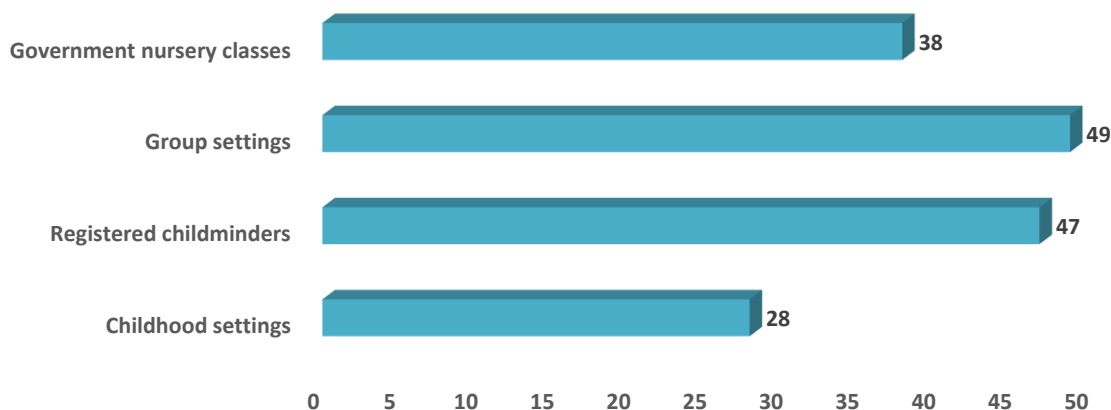
Provider type	Number of providers
Government nursery classes	24
Group settings (nurseries) (nurseries)	27
Registered childminders	45
Accredited nannies	34
Childhood settings	71
Total number of providers	198

Whilst registration data held by the Government of Jersey CYPES department shows that the number of registered childminders has declined over the last 5 years (falling from 64 in 2019 to 45 in 2023) there are still more registered childminders than accredited nannies (34 in 2023). There are a similar number of group settings (nurseries) and Government school nurseries providing pre-school education and care.

A quarter (24%) of group settings (nurseries) in Jersey are based across multiple locations.

Whilst there were calculated to be 71 registered childhood settings in Jersey, only 3 of these providers are known to offer wrap around or holiday care for pre-school age children (those aged 3 to 4).

Figure 1: Mean number of weeks expected to be open throughout the year, 2023



Childminders and group settings (nurseries) expect to be open for the longest number of weeks on average across the year. The majority of group settings (nurseries) and childminders provide childcare services all year round; 11% of childminders provide childcare services during term-time only compared to 15% of group based providers and 100% of Government school nursery classes.

Around half of childhood settings are open for at least 38 weeks of the year (i.e. term-time provision or term-time plus holiday provision). Around half are open during school holidays only, reducing the mean number of weeks they expect to be open across the year.

3. Number of childcare places and capacity

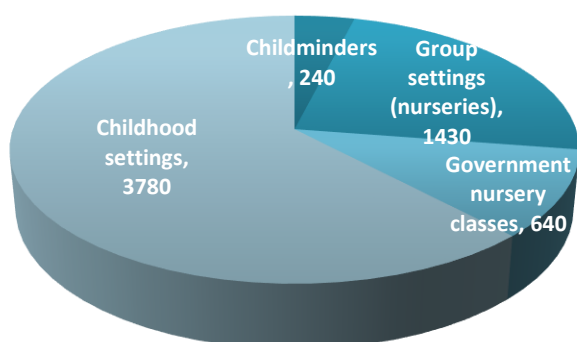
This section provides information on the number of childcare places that providers are registered for with the CYPES department, the number of children they have filling those positions (headcount); and the number of surplus childcare places they have available broken down by age of child and by full-time/part-time.

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. For Government school nurseries and group settings (nurseries), the registered number of children refers to children aged 0 to 4 years only (i.e. pre-school age children). For childminders, the registered number of children can also include school aged children who they are registered to look after before/after school. Childhood settings are generally registered to care for a specified number of school age children (5 to 12 years).

In December 2023, it was estimated that there was a total of **5,890** registered childcare places; **2,250** of these registered places were thought to reflect term-time or all year round registered places for pre-school children (i.e. aged 0 to 4). This number does not include accredited nannies who are not registered for childcare places like other provider types. In addition, this number does not include registered places at private school nurseries.

Figure 2: Total number of registered places by provider type, 2023



Childhood settings have the greatest proportion of registered places, however around half of these providers offer care during the school holidays only and the majority are registered to care for children aged 5 to 12.

Although childminders make up the biggest group of providers of pre-school care, on average they are registered to care for 5 children per provider; 3 children aged 0 to 4 years and 2 school aged children.

As a result, childminders have the smallest proportion of registered places in Jersey. In comparison, the majority of registered places for pre-school age children are in group settings (nurseries) that have on average 57 registered places per provider for children aged 0 to 4.

Table 2: Mean number of registered places by provider type and age of child, 2023

Provider type	Under 2 years	2 to 3 years	3 to 4 years (NEF year)	Total aged 0 to 4 years	Total school age
Government nursery classes		31	31		
Group settings (nurseries)	15	19	24	57	
Childminders				3	2
Childhood settings					55

The average number of registered places per provider is higher in England than in Jersey; in 2023 childminders were registered to care for 7 children on average in England (compared to 5 in Jersey) and school-based providers were registered to care for 37 children on average (compared to 31 in Jersey). It should be noted that in England, childminders are permitted to employ an assistant to support the higher number of children in their care. The average number of registered places in group settings (nurseries) was similar in England and Jersey (56 and 57 registered places on average, respectively).

Statistics for England referenced from [Childcare and early years provider survey, Reporting year 2023 – Explore education statistics – GOV.UK \(explore-education-statistics.service.gov.uk\)](https://explore-education-statistics.service.gov.uk)

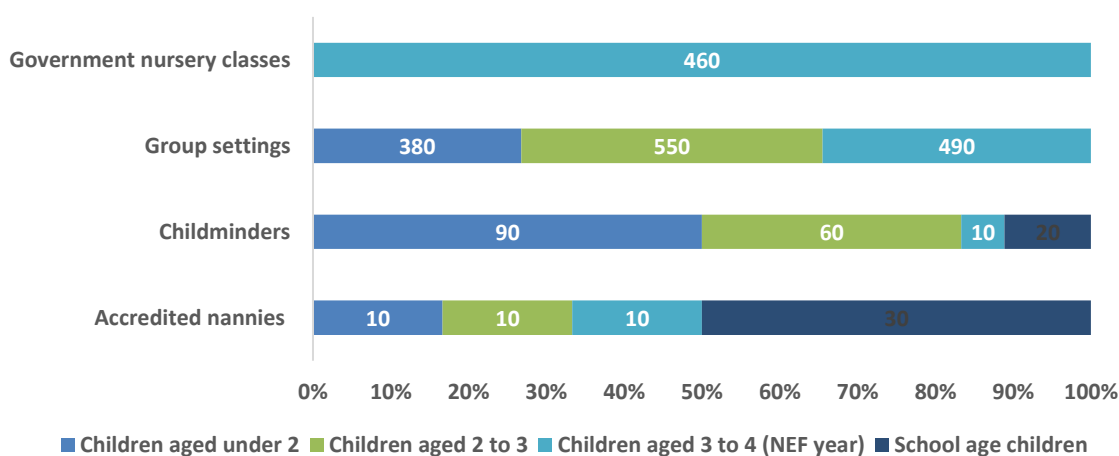
Number of filled places

The number of filled places refers to the number of children booked with the provider i.e. the headcount. At any one given time, the number of filled places should not exceed the number of registered places. At the time of the survey, it was estimated that there was a total of 2,110 children booked to attend childcare and early years providers (including Government nursery classes, group settings (nurseries), childminders and accredited nannies). This number does not include children booked with breakfast/after-school, holiday and activity clubs as many of these were not open at the time of the survey and the headcount at these clubs is changeable i.e. different children can be booked to attend different days/weeks.

Figure 3 below presents the number of filled places by provider type and age of child.

At the time of the survey, around 50% of childcare places with accredited nannies were filled by children of school age. In comparison, childminders had a younger age profile of children booked to attend their setting: around half of places with childminders were filled by children aged under 2 and a third of places were filled by children aged 2 to 3. Within group settings (nurseries), the demographic breakdown of children from different age groups was more evenly distributed.

Figure 3: Number of filled places by provider type and age of child, 2023



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 that weren't filled and they were willing to take on additional children. Government nursery classes had the greatest capacity to care for additional children, with 80% of these providers reporting capacity to care for additional children aged 3 to 4 (NEF year) equating to 180 unfilled places.

A third (33%) of group settings (nurseries) reported some capacity to care for additional children, compared to 41% of registered childminders.

Seven out of ten (70%) childhood settings reported that during the last full week they were open, they had some capacity to care for additional children aged 3 to 12 years i.e. for wrap around or holiday provision.

Capacity to care for additional pre-school children varies by age group; across the sector there is significantly more capacity to care for children approaching school age than for those aged under 2 years. At the time of the survey only 11% of childminders (equating to 5 providers) and 13% of group settings (nurseries) (equating to 3 providers) had some capacity to care for additional children aged under 2 years.

Capacity to care for children aged 2 to 3 was marginally higher with a quarter of group settings (nurseries) reporting they had some capacity to care for additional children aged 2 to 3..

Table 3: Percentage of providers that had capacity to care for additional children on every day of the week, 2023

	Children aged under 2	Children aged 2 to 3	Children aged 3 to 4 (NEF year)
Government nursery classes			81%
Group settings (nurseries) (nurseries)	13%	27%	20%
Childminders	11%	15%	22%

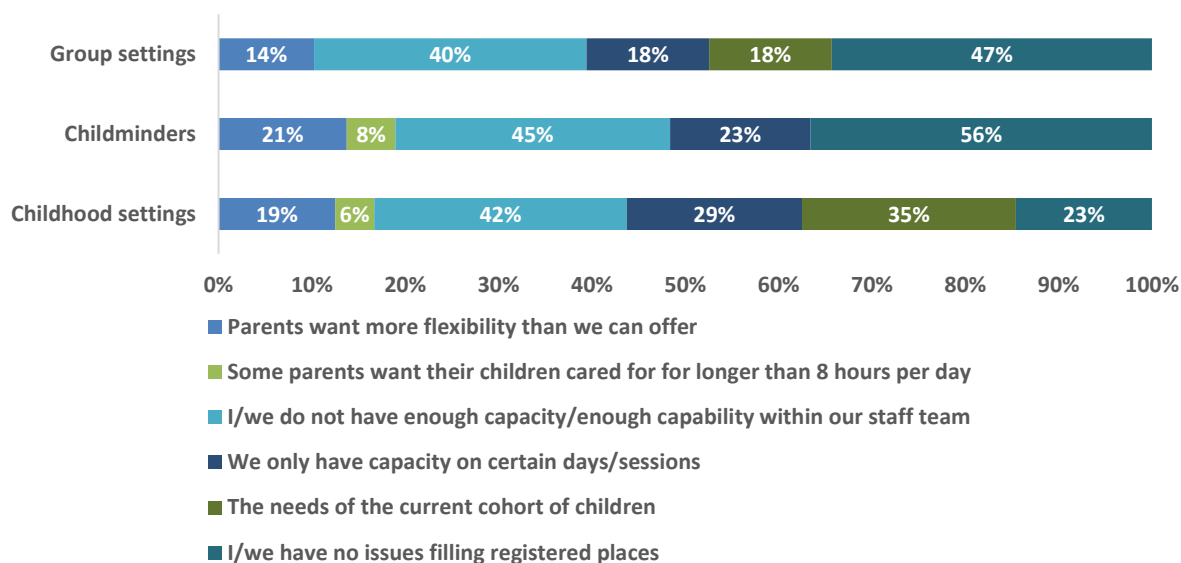
When looking at capacity on different days of the week it was evident that childminders had more capacity to care for children during the latter half of the week (Wednesday to Friday) than at the beginning of the week.

Group settings (nurseries) had more capacity to care for children during whole day and afternoon sessions than during morning sessions only.

Providers were asked if they had difficulties filling their registered places. Many providers commented that whilst their figures showed they currently had some capacity to care for additional children this was because surplus spaces were reserved for children that would be starting with them in the coming weeks/months or for children who were moving up through the age groups. They were clear in their comments that capacity is fluid and changes by the day.

Around half of childminders and group settings (nurseries) said they had no difficulties in filling their registered places. This compares to a quarter (23%) of childhood settings who said they had no issues. Across all providers types, around 40% said they did not have enough capacity to care for more children or didn't have enough capacity/capability in their staff team. A quarter of providers said they only had capacity to care for additional children on certain days/sessions across the week.

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 staff working in the childcare and early years sector as well as providing key insights into staff turnover levels and the number of unfilled vacancies.

Number of employees

In December 2023 it was estimated that approximately 1,160 people worked directly with children in the childcare and early years sector. 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 school nursery classes).

In 2023, more than half (57%) of practitioners were employed by childhood settings and 36% were working in group settings (nurseries). Across all providers, around 61% of employees were working full-time hours. Around four-fifths (79%) of childminders and practitioners in group settings (nurseries) were working full-time hours compared to around a third (38%) of practitioners in childhood settings.

Only group settings (nurseries) and childhood settings reported employing voluntary staff; 3% of part-time employees in group settings (nurseries) were reported to be employed on a voluntary basis. In childhood settings the proportion of voluntary staff was higher; at the time of the survey 22% of full-time employees and 14% of part-time employees were employed on a voluntary basis.

Table 4: The average number of employees by provider type (group based providers), 2023

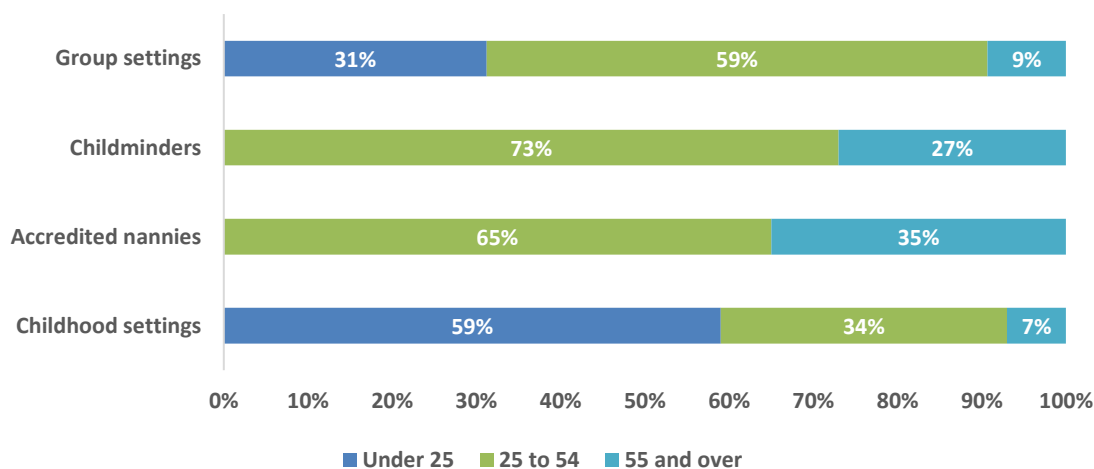
	Mean number of full-time employees	Mean number of part-time employees	Mean number of total employees
Group settings (nurseries)	14	4	17
Childhood settings	5	8	13

Whilst the average number of registered places per group setting is similar in Jersey and England, the average number of paid employees working in group settings (nurseries) is higher in Jersey; the average number of paid employees per group setting in Jersey was 17 in 2023 and in England it was 14.

Statistics for England referenced from [Childcare and early years provider survey, Reporting year 2023 – Explore education statistics – GOV.UK \(explore-education-statistics.service.gov.uk\)](https://www.gov.uk/explore-education-statistics)

Age range

Figure 5: Age profile of childcare and early years practitioners, 2023



Older age profiles were more apparent for childminders and accredited nannies. Around two-thirds of childminders and accredited nannies were aged 25 to 54 years and roughly a third were aged 55 and over. No childminders or accredited nannies who responded to the survey were aged under 25, suggesting there are very few younger practitioners working in these settings.

Practitioners working in childhood settings had a significantly younger age profile, with the majority of employees (59%) aged under 25. Around a third of practitioners working in group settings (nurseries) fell into the younger age bracket.

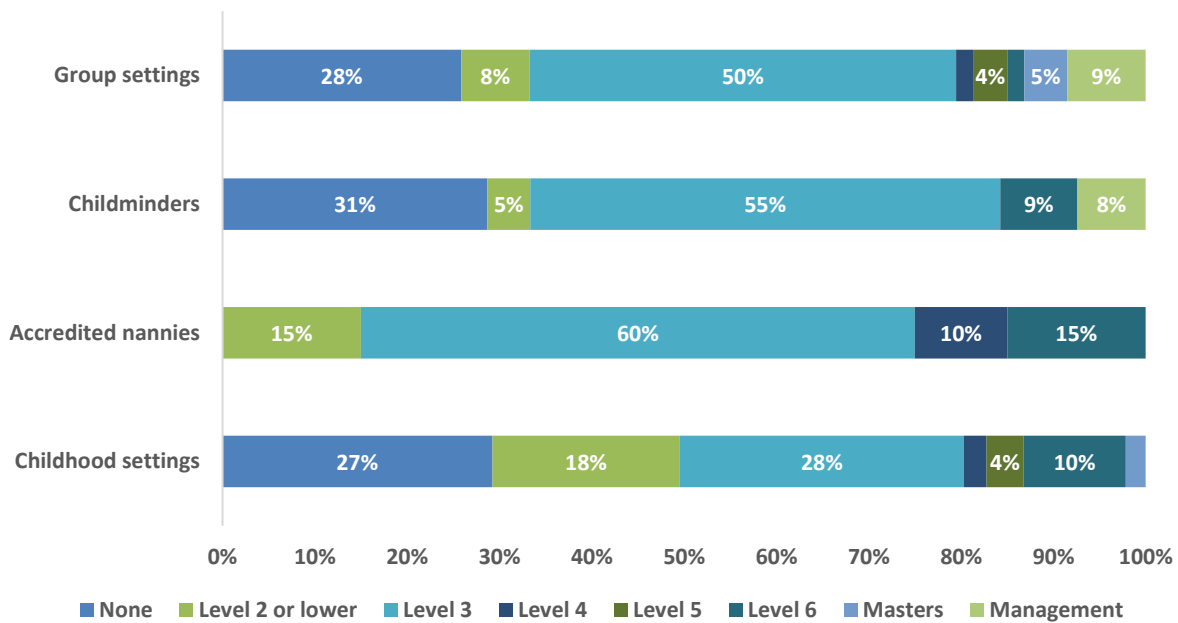
Highest level of qualification

Childminders and accredited nannies were asked about their highest level of qualification and group based providers (nurseries and childhood providers) were asked about the qualification profile of their staff.

In 2023, accredited nannies were the most highly qualified provider type with 85% reporting to hold a Level 3 qualification or higher; 15% of nannies reported holding a Level 6 qualification.

Just over half (55%) of practitioners working in childhood settings were reported to hold a Level 3 qualification or higher. This compares to 64% of childminders. It should be noted that whilst almost a third (31%) of childminders reported holding no formal qualifications, many of these practitioners said they had completed the six short courses that were a pre-requisite to childminding registration in previous years.

Figure 6: Highest level of formal qualification held by childcare and early years practitioners, 2023



Staff turnover

The survey showed that in 2023, the turnover of childcare employees was significantly higher in group settings (nurseries) (19%) than in childhood settings (7%); some group settings (nurseries) lost up to 30% of their staff in the latest year. In 2023, the majority (59%) of childhood providers reported retaining 100% of their staff on an annual basis.

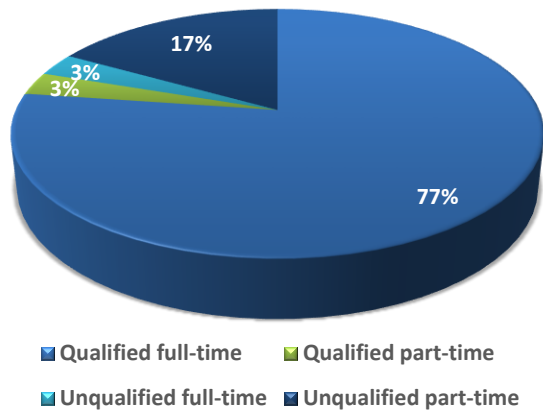
Table 5: Childcare employee turnover rates (group based providers), 2023

	Turnover rate
Group settings (nurseries)	19%
Childhood settings	7%

Vacancies

Two thirds (67%) of group settings (nurseries) and a third (35%) of childhood settings reported having at least one vacancy at the time of the survey. This equates to approximately 40 open positions across each provider type; 80 open vacancies in total.

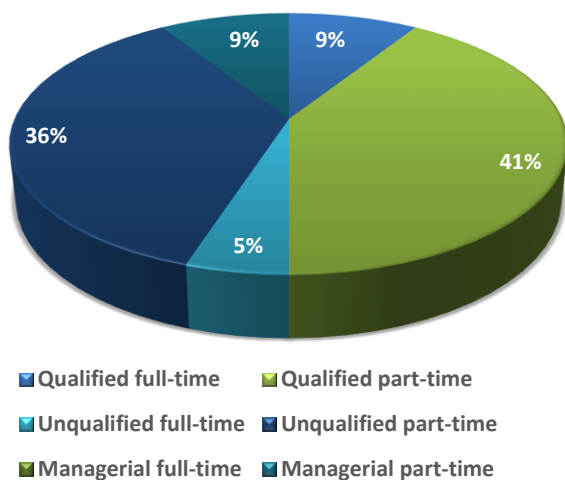
Figure 6: Vacancies within group settings (nurseries), 2023



Within group settings (nurseries), the majority (78%) of open positions reflected qualified full-time positions however a fifth (17%) of vacant positions were unqualified part-time positions.

Nurseries (private, charity led and not-for-profit settings) reported that vacant positions for unqualified staff reflected their need for 0 hours bank staff. None of the open vacancies reported by group settings (nurseries) were for managerial positions.

Figure 7: Vacancies within childhood settings, 2023



The profile of vacancies was different for childhood providers with the majority of open vacancies being for part-time roles.

In 2023, 41% of vacancies with childhood providers were for qualified part-time positions and a further third (36%) were for unqualified part-time positions.

Around half (52%) of group settings (nurseries) that had open positions, thought they would have difficulties recruiting in the next 12 months and a further third (34%) were unsure. One nursery reported that they had been trying to recruit for a team leader for over a year.

This picture was similar for childhood settings; just over half (53%) of childhood settings thought they would have difficulties recruiting and around a third (32%) said they were unsure.

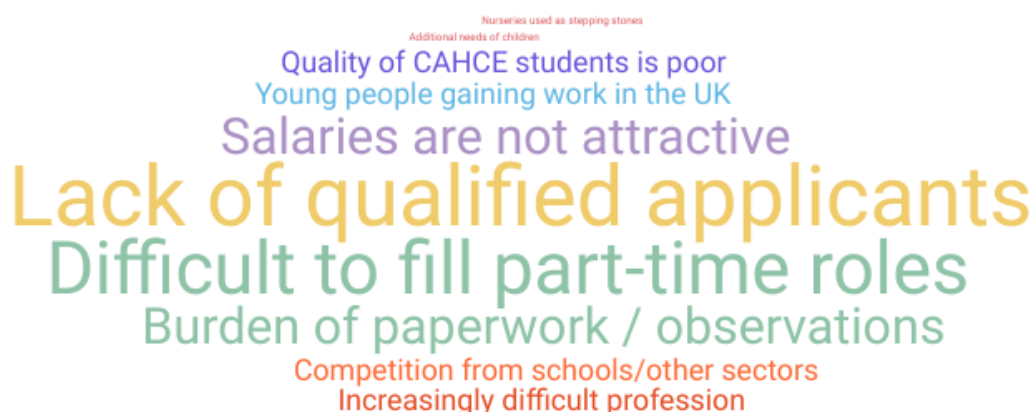
When asked about their recruitment practices, two-fifths of group settings (nurseries) (38%) with vacancies said they were trying to recruit off-island and a further 13% said they were considering an off-island search.

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
Group (nurseries)	settings	88%	38%	13%

The most common reasons given for recruitment difficulties were a lack of qualified applicants, difficulties experienced trying to fill part-time qualified positions, as well as unattractive salaries/not being able to compete with other sectors. Childhood settings particularly identified difficulties caused by young people not returning to Jersey to work during the holidays or after they complete their education; this is particularly relevant for this provider type as around 60% of the workforce are aged under 25.

Figure 8: Why do you think you will have problems recruiting over the next 12 months?



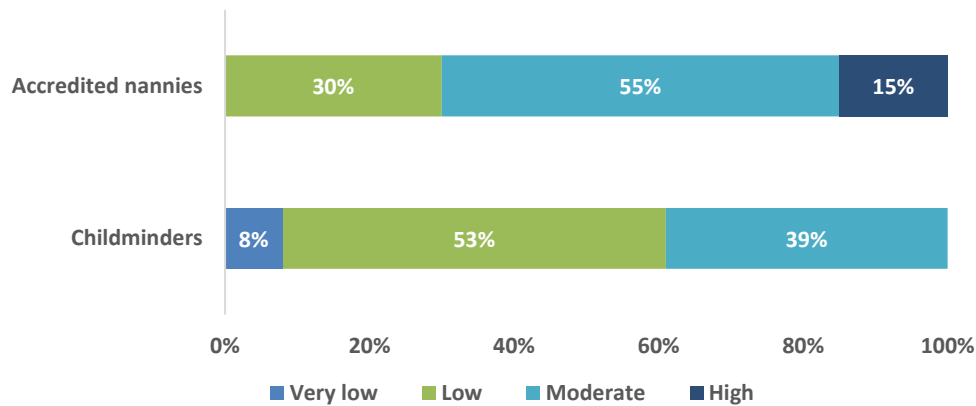
5. Childminders and accredited nannies: Wellbeing & job satisfaction

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 15% of accredited nannies and 0% of childminders reported high levels of stress. Around 40% of childminders reported moderate levels of stress whereas 70% of accredited nannies reported moderate or high levels.

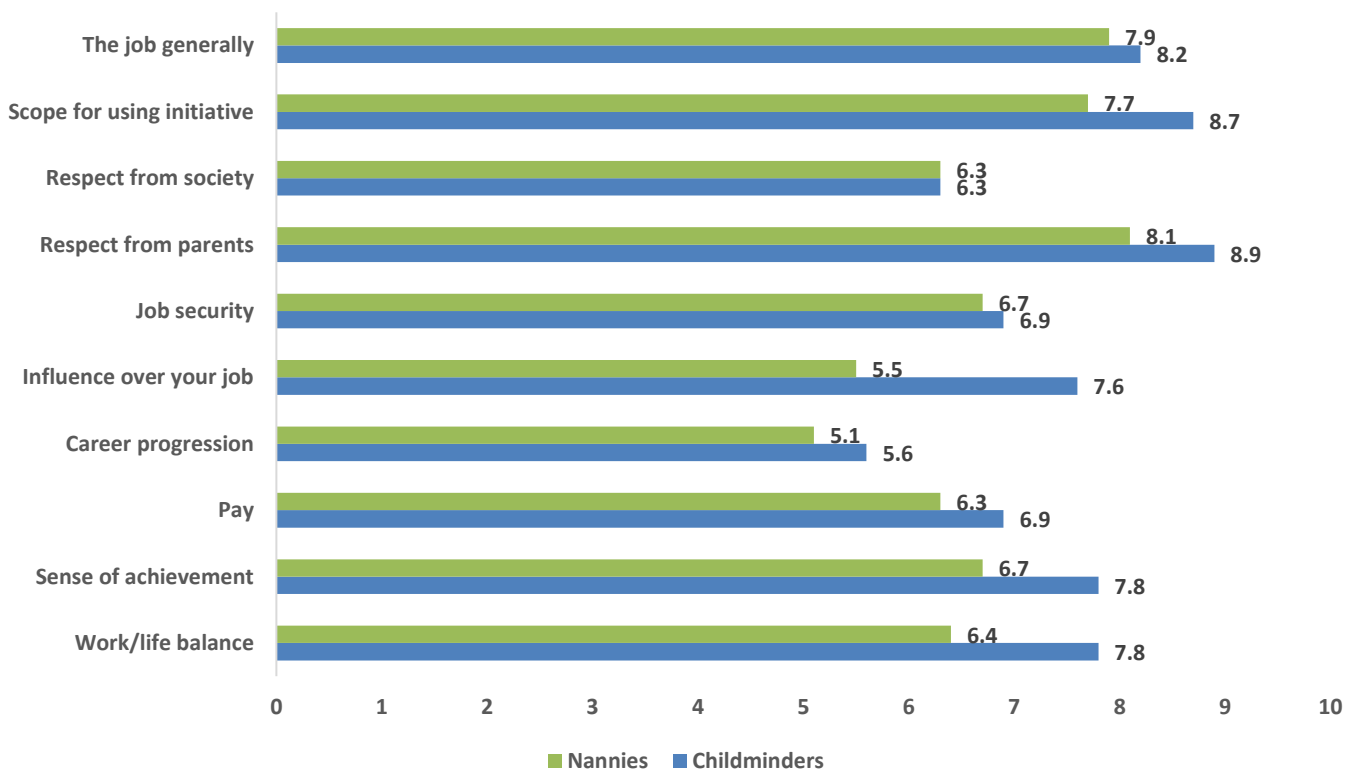
Figure 9: Self-reported levels of stress by childminders and accredited nannies, 2023



Job satisfaction

Figure 10 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 10: Average ratings of satisfaction provided by childminders and accredited nannies, 2023



In general, childminders provided higher ratings for all aspects of their job on average than accredited nannies. Both childminders and accredited nannies provided an average rating of 6.3 for ‘respect from society’.

Across all provider types, the most highly rated aspects of the job were ‘respect from parents’, ‘the job generally’ and ‘scope for using initiative’. Childminders also provided high average ratings for ‘influence over job’, ‘sense of achievement’ and ‘work/Life balance’.

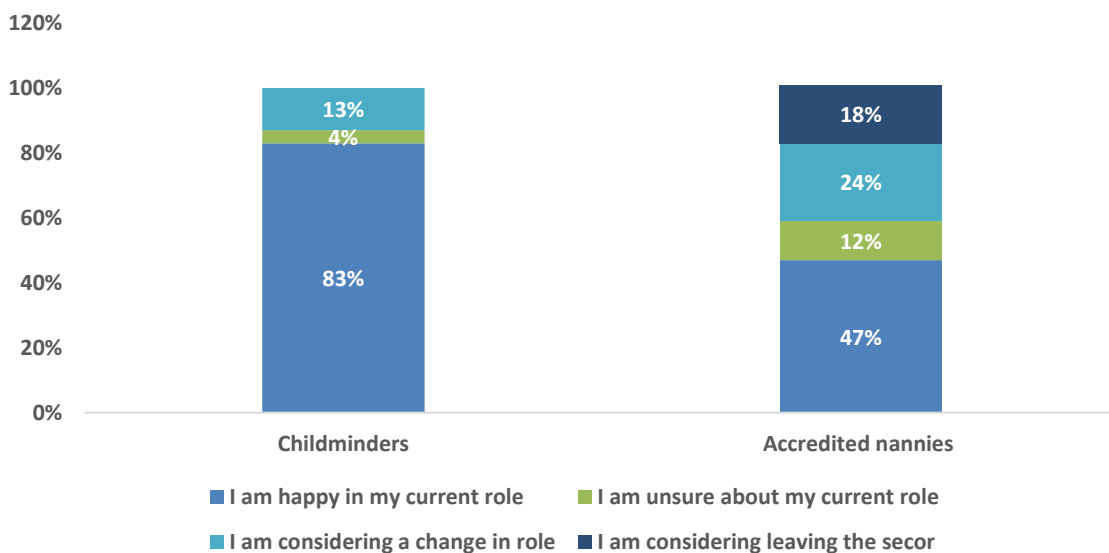
The lowest average ratings given by both childminders and accredited nannies were for 'career progression'.

Sustainability

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

Again, childminders were more positive, with four-fifths reporting they were happy in their current role and only 13% reporting they had considered a change in role in the last 12 months. In comparison, less than half (47%) of accredited nannies reported being happy in their current role and around two-fifths (42%) reported they had considered leaving their role or leaving the sector altogether.

Figure 11: Have you considered leaving your current role in the last 12 months?



When childminders and accredited nannies were asked why they had considered leaving their current role in the last 12 months, the most common reasons cited were 'to achieve a better work/life balance' and 'to improve their job security'. Accredited nannies also commonly reported that they had considered leaving their current role due to 'difficulties meeting parents' expectations'.

Figure 12: Why have you considered leaving your current role?



6. Childcare fees, provider finances and profitability

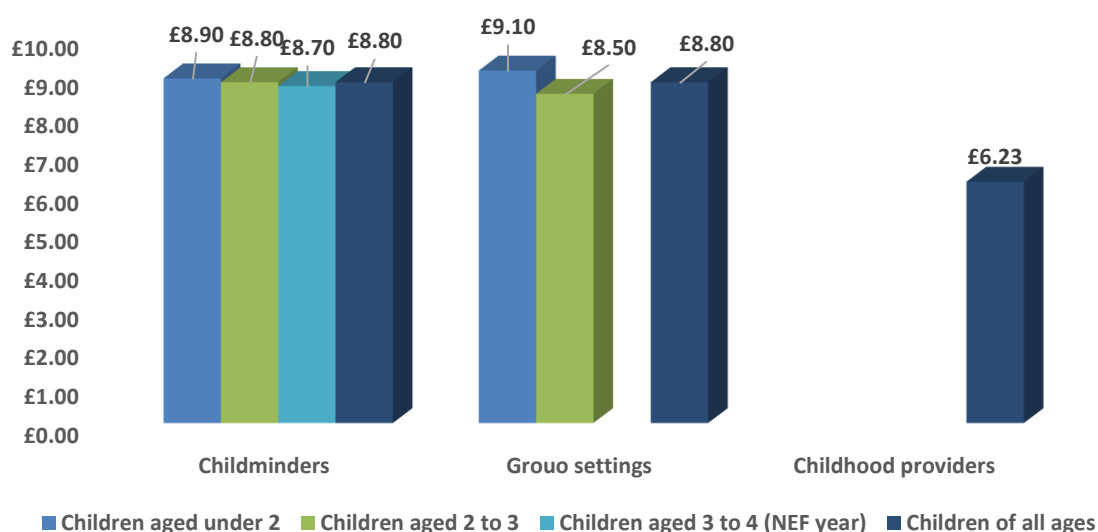
This section describes average fees charged to parents by childcare providers and provides an overview of provider finances and current and anticipated profitability.

Average fees

The average fee charged per child (of all ages) by childminders and group settings (nurseries) was similar at £8.80 per hour. This picture is different from that observed in England where in the latest year, fees charged by childminders were significantly lower for children of all ages than those charged by group settings (nurseries).

In Jersey the average rate charged per hour by childhood settings (i.e. for holiday and wrap around care) was £6.23.

Figure 13: Mean hourly fees charged to parents by provider type and age of child, 2023



In Jersey, childminders fees for children aged under 2 are 37% higher than those charged by childminders in England (average across all regions) and the fees charged by group settings (nurseries) are 22% higher. Average fees charged in Jersey are more comparable to those in London; in 2023 the average fee charged to care for children aged under 2 was 15% higher in Jersey than in London.

Statistics for England referenced from [Childcare and early years provider survey, Reporting year 2023 – 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 £20,000 to £29,000 to £40,000 to £49,000 per annum.

Table 7: Percentage of providers reporting to have raised their fees over the last 12 months, 2023

	Percentage of providers reporting to have raised their fees
Group settings (nurseries)	100%
Registered childminders	64%
Accredited nannies	38%
Childhood settings	75%

All group settings (nurseries) that responded to the survey reported that they had raised their fees over the last 12 months. This compares to 75% of childhood settings, 64% of childminders and 38% of accredited nannies.

Provider finances

Registered childminders, group settings (nurseries) and childhood settings were asked to provide an overview of their expenditure (i.e. the percentage of their annual expenditure allocated to various costs such as staffing, resources, etc.). As this reflects a baseline for this survey and the first time financial data of this nature has been collected from childcare providers, the expenditure breakdown data provided by the group settings (nurseries) was not sufficient to provide robust estimates.

Expenditure data provided by childminders showed that their greatest outgoings were on ‘other costs’ which included petrol and other driving related costs as well as memberships and activities. A large proportion of their outgoings were also allocated to materials and social security/ITIS payments.

For childhood settings, the greatest proportion of annual expenditure was attributed to employee salaries. This was followed by rent/mortgage payments and materials.

Table 8: Breakdown of total provider costs, 2023

	Employee salaries	Rent / mortgage payments	Materials used in the course of provision	Training	Insurance	Social security and ITIS payments	Meals and snacks	Other costs (e.g. petrol / driving and memberships /activities)
Childminders			20%	4%	10%	20%	12%	34%
Childhood settings	59%	14%	10%	3%	8%		4%	2%

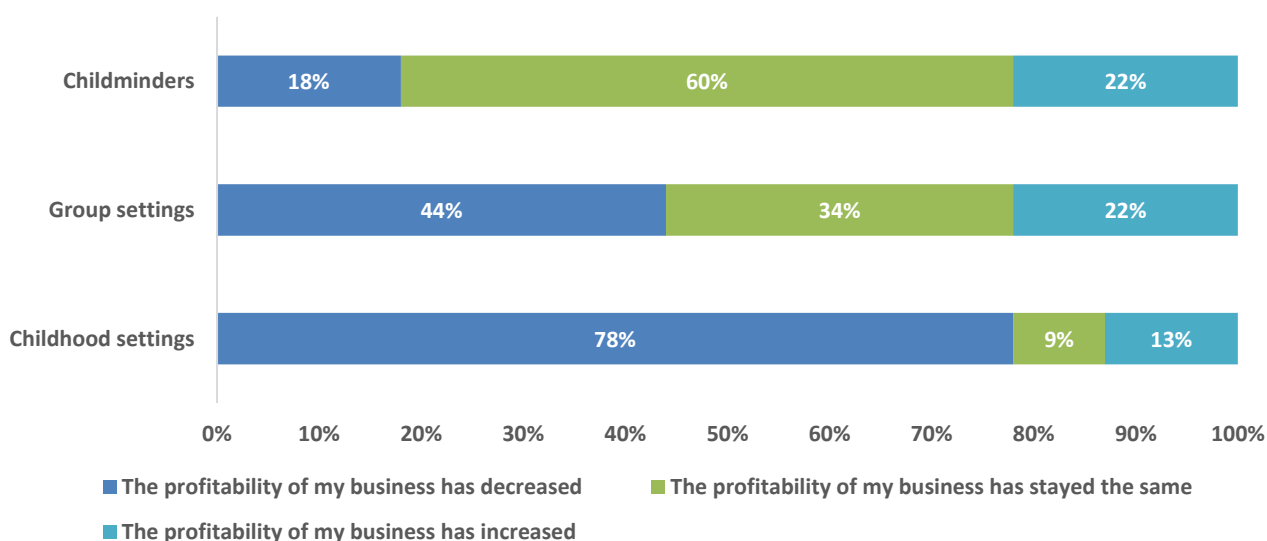
Group settings (nurseries) and childhood settings were asked about the policies and benefits they offered to their paid staff. Around half of group settings (nurseries) (53%) and childhood settings (54%) said they paid a living wage to all their staff in 2023.

A fifth (22%) of group settings (nurseries) said they offered a health care plan to their staff and a quarter (28%) said they offered an employee pension. Almost all group settings (nurseries) who said they offered these benefits to employees said these were offered to those holding management positions only.

Profitability

Group settings (nurseries), registered childminders and childhood settings were asked whether the profitability of their business had changed over the 12 months. Figure 14 below shows that a similar percentage (22%) of childminders and group settings (nurseries) said the profitability of their business had increased over the last 12 months (2023). Less than a fifth (18%) of childminders said profitability had decreased over the last year compared to more than two-fifths (44%) of group settings (nurseries) and four-fifths (78%) of childhood settings.

Figure 14: How has the profitability of your business changed over the 12 months?



When asked about their expectations for future profitability, childminders were marginally more positive than group settings (nurseries) and childhood settings, with 78% of childminders saying they expected profitability to either stay the same or increase in the next 12 months. This compared to two-thirds (66%) of group settings (nurseries) and childhood settings (60%) that were positive about future profitability.

Group settings (nurseries) (group settings (nurseries) and childhood settings) were asked whether they expected to continue providing childcare services in 2024. 86% of group settings (nurseries) and 69% of childhood settings said they expected to continue providing childcare services in 2024. Those that were unsure about their future or expected to close over the coming 12 months reported that rising staff costs and difficulties recruiting qualified staff were threatening the viability of their business.

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 pre-school care (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 9: Percentage of children who are multi-lingual learners by provider type, 2023

	Percentage of multi-lingual learners
Group settings (nurseries)	18%
Childminders	10%
Accredited nannies	17%
Total	17%

Across all provider types, the percentage of children booked to attend childcare and early years settings that were multi-lingual learners was 17%. The percentage of multi-lingual learners booked into childminder settings was lower than that booked with group settings (nurseries) and accredited nannies.

The most common languages spoken by children (at home), in addition to English, were Portuguese, Polish, French and Romanian. For children booked to attend group settings (nurseries) or childminders, the most common language spoken in addition to English was Portuguese. In comparison, the most common second language for children booked with accredited nannies was French.

When asked about the languages practitioners spoke with the children in their care, only a small number of accredited nannies reported speaking second languages in their setting that aligned with those spoken by children at home. No childminders or group settings (nurseries) reported that common second languages such as Portuguese or Polish were spoken with children in their setting.

8. Top issues

All providers were asked what they thought the top issues were facing the childcare and early years sector over the next three years.

The top issues identified by providers were ‘attracting future child-carers/employee recruitment’ and ‘running costs’. For accredited nannies, ‘meeting parents expectations’ and the ‘health and wellbeing of practitioners’ were also key issues. Group settings (nurseries) identified ‘employee retention’ as another key threat.

Figure 15: What do you think are the top 3 issues facing the childcare sector over the next 3 years?



Appendix A: Background notes

Methodology

In December 2023, all registered childminders, accredited nannies, group settings (private, charity-led and not-for-profit nurseries) and childhood settings (breakfast/after-school, holiday and activity clubs) 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 administered using SmartSurvey technology. Two reminder emails were sent to encourage non-respondents to take part in the survey, and some group settings (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 54 per cent equating to almost 100 completed surveys. The response rate for childminders, accredited nannies and group settings (nurseries) was significantly higher than that for childhood settings, and ranged from 60% and 75%. 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 group settings (nurseries) 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 group settings (nurseries), data provided by group settings (nurseries) were also weighted by size (i.e. number of registered places). Using this methodology, smaller nurseries 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 care services to children in Jersey aged 0 to 12 years. For the purposes of this survey childcare and early years providers include registered childminders, accredited nannies, group settings (private, charity led and not-for-profit nurseries), Government school nursery classes and childhood settings (breakfast/after school, holiday and activity clubs).

Registered childminders are practitioners who have registered with the CEYS department 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.

Group settings (nurseries) include private nurseries and those nurseries that are charity led or set up as not-for-profit organisations. Group settings provide childcare services for children from 0 to school age. All group settings are registered with the CEYS department to care for a specified number of children of different ages. Group 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. Childhood providers are registered with CYES to care for children aged 3 to 12. Childhood settings can offer a single activity to children such as an art club or sport club or can offer a combination of play work and multi-activities.

Government school nurseries provide care and education for children aged 3 to 4 in the pre-school year. The majority of Government provided primary schools on the island now have a nursery provision. School nursery classes were not included in the original survey due to contentions that had arisen from the teaching union strike action. Where possible, already existing data on school nurseries such as the number of providers and their capacity to care for pre-school children has been included in the report to provide an overall picture of the sector.

The number of registered places is the maximum number of children a provider is allowed to look after at any one time. For Government school nurseries and group settings (nurseries), the registered number of children refers to children aged 0 to 4 years only (i.e. pre-school age children). For childminders, the registered number of children can also include school aged children who they are registered to look after before/after school. Childhood settings are generally registered to care for a specified number of children aged 5 to 12 years however a small number of settings are registered to care for children as young as 3.

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.