

Employers For Childcare

Northern Ireland Childcare Survey 2020

Findings of the 11th childcare survey and a follow up study
into childcare during the Covid-19 pandemic



Foreword

This year, what our research has demonstrated more clearly than ever before, is just how vital our childcare infrastructure is – not only to our economy, in helping parents to access and stay in work – but also to the educational and social development of children, and to the mental health and well-being of families. The economic argument for investing in a thriving childcare infrastructure has already been made. But what struck me most, on reading the experiences of parents who were unable to access childcare at the height of the Covid-19 pandemic, were the feelings of stress, anxiety and worry they shared, and their fears for the impact that this would have on their children. If our Government truly wants to ‘build back better’ from the experiences of this pandemic, then it must make urgent progress on a Childcare Strategy for Northern Ireland.



At the same time, with many childcare providers reporting, even before Covid-19, that they were already finding it difficult to just break even, I am deeply concerned about the future of our sector. The childcare sector stepped up to provide childcare for the children of key workers, and has sought to deliver nurturing care, stability and educational enrichment for our children throughout the pandemic. However, many providers had no option but to close for some or all of the initial months of Covid-19, and some have continued to experience a decline in occupancy and temporary closures since then. This is a sector that cannot afford to wait any longer for the long overdue Childcare Strategy, and for the investment it needs.

I would like to say thank you to all of the parents and childcare providers who responded to our surveys this year, and who are reading this report. With the establishment of a new All Party Group on Early Education and Childcare in Northern Ireland, we will be using the findings of this research to put pressure on the Government to act on the evidence you have provided, and the promises it has made in the past. It is wrong that, in 2020, there is still no up to date Childcare Strategy for Northern Ireland and that, as a result of the lack of financial support with childcare, many parents are telling us they have no choice but to leave the workplace.

Covid-19 may have exacerbated the challenges experienced by the childcare sector, but it did not create them. Equally, progress was already long overdue on a Childcare Strategy prior to March 2020. Covid-19 cannot therefore be used as an excuse for the continued absence of a Childcare Strategy or timeline for its finalisation. This is not good enough. With our last full Childcare Strategy having been published two decades ago, this generation of parents and children need to see progress now. In fact, what the response to Covid-19 has shown, is that the Government CAN take action quickly and efficiently where it’s needed. And what is needed now is – urgent action to invest in our childcare infrastructure, which is of critical importance to enable economic recovery, nurture the social and educational development of our children, and to support children and families who are at risk of poverty. It is only with this action that we can hope – as an economy and as a society – to truly build back better.

Marie Marin, Chief Executive

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Introduction

In early 2020, as we started surveying parents and childcare providers for the 11th Northern Ireland Childcare Survey, little did we imagine that - just a couple of months later - we would be facing into a global pandemic that saw childcare providers and schools closed to all but the children of key workers, and many of us required to work from home. As well as the closure of formal, registered childcare provision, due to social distancing and shielding requirements, access to informal childcare – such as that provided by grandparents – was also no longer an option for families.

Access to childcare immediately emerged as a pressing issue, demonstrating its vital role for children, for families and in enabling our society – as well as our economy – to function. Despite this, childcare failed to feature in the initial ‘Pathway to Recovery’ plan published by the Northern Ireland Executive in May 2020.¹ This oversight led to immense concern and frustration amongst those who contacted our charity daily, including:

- Parents struggling to work from home while caring for their children or home-schooling
- Key worker parents unable to access the childcare they needed to fulfil their vital roles
- Childcare providers struggling financially, anxious about the future but eager to adapt to ensure the safety of children in their care.

With the subsequent establishment of a Childcare Reference Group within the Department of Health and Department of Education, funding allocated to the childcare sector, and the gradual re-opening of provision, the situation has moved on – but there remain deep concerns about the sustainability of our vital childcare sector, and access to affordable care for the families who rely on it.

In this constantly evolving situation, robust evidence is vital to inform the development of policies and – critically – the still long overdue Childcare Strategy committed to within the New Decade, New Approach deal which marked the restoration of the Stormont Assembly at the start of the year. We decided to carry out a further follow-up survey of parents in Northern Ireland, to build on the findings from the 2020 Northern Ireland Childcare Survey, and secure an evidence base detailing the impact that the pandemic has had on parents’ access to childcare and, therefore, their ability to work. The findings inform this report, which also highlights the differing experiences of mothers and fathers, as well as particular challenges for lone parents and for families who have a child with a disability.

It is important to reflect that the childcare **challenges of 2020 have been exacerbated by the Covid-19 pandemic – but not created by it.** The findings from the 11th Northern Ireland Childcare Survey underline the existing fragilities and fault lines – rising costs for both parents and providers, families struggling to access and afford the childcare they need and many providers finding it impossible to break even. While the focus of this report is on the impact of Covid-19, this should be read in the context of the broader Childcare Survey, the findings of which are included at section two. What emerges, therefore, is an evidence base which reinforces the importance of supporting the childcare sector to weather the Covid-19 pandemic, but also the crucial need for strategic investment and a longer term Childcare Strategy.

¹ <https://www.nidirect.gov.uk/articles/coronavirus-covid-19-recovery-plan>

About Employers For Childcare

Employers For Childcare comprises a registered charity and a social enterprise. 100% of the profits from our social enterprise businesses – a Childcare Voucher company, a recruitment and AccessNI service for childcare providers and High Rise (an indoor family adventure centre) are invested into our charity. As a charity, our aim is to make it easier for parents with dependent children to get into work and to stay in work. We help parents maximise their incomes, manage childcare costs and create a suitable work-life balance. Through working with employers and policymakers, we have sought to encourage and secure better support for families in the workplace and in public policy. We address childcare as a labour market and economic issue, as well as a social one.

About the research

Northern Ireland Childcare Survey 2020

Employers For Childcare has conducted the annual Northern Ireland Childcare Survey since 2010 to explore the experiences of parents and childcare providers. This survey marks the 11th in this unique series, which is widely used to inform political debates and policy development in relation to childcare. Data collection took place during February and March 2020. Childcare providers and parents were invited to respond voluntarily to an online survey that was circulated across a variety of networks and shared on social media. In total, we received 2,627 responses from parents and 483 from childcare providers.

Experiences of childcare and work during Covid-19

On 8 September 2020, we opened a follow up survey asking parents to share their experiences of childcare and work during Covid-19. The survey closed on 2 October 2020, and we received 2,089 responses, representing 3,879 parents in Northern Ireland – 53% mothers, and 46% fathers.

Thank you!

We would like to thank each parent and childcare provider who completed the Northern Ireland Childcare Survey 2020, and those parents who completed the follow up survey on experiences of childcare and work during Covid-19. This report highlights and reflects your views, attitudes and experiences. We continue to strive to achieve a childcare system that is affordable, accessible and flexible to meet the needs of employers, families, childcare professionals and providers.



“Covid-19 has brought into very sharp focus just how much we rely on those who look after our children and the massive benefit they have provided to them. The relationships between children and carers are so important and it was lovely to see the happiness at being back together. Aside from the fact that childcare allows us to work without worrying about children, the educational / social / emotional support they provide for our children is invaluable.”

“Nurseries and childcare are critical to parents. They play such a vital role in allowing parents to work... Please do not let the schools and child care settings close again!”

“Currently 90% of my salary goes on childcare. Both myself and my husband are in good jobs but struggle to make ends meet and have had to cut back on essentials to afford childcare and essentials for our child, at present, there is no way we could afford a second child as childcare costs would mean we could not afford our mortgage, groceries, and heating.”

“Minimum wage increase adds thousands to our wage bill that we can't cover without raising costs - alongside increasing running costs, we are at risk of closing services.”

Childcare provider

“We currently are using our annual leave, but that will run out very soon. So we will end up with no childcare and no annual leave to look after them during school holidays.”

Key findings

In 2020, Employers For Childcare conducted two surveys examining childcare in Northern Ireland – one prior to the pandemic, in February and March 2020, and one in September 2020, following months of lockdown and as children started to move back into school. The findings provide a vital insight into the childcare challenges of 2020 – those which it is clear existed prior to the Covid-19 pandemic, and those that have been exacerbated by it.

What emerges is a strong evidence base for strategic investment in this vital sector, to ensure that quality childcare is sustainable, accessible and affordable, and a plea that childcare is central to Government planning and policy-making, with the childcare sector exempted from any further lockdown. Otherwise, the risks are clear:

- A collapse in the supply of quality childcare and increase in costs for parents and providers
- Parents having to reduce their hours at work or leave work altogether
- Our overall economic and societal recovery from Covid-19 will be held back
- Increase in levels of household and child poverty
- Prolonged negative impact on the social and educational development of our children.



Families and childcare providers at financial breaking point prior to Covid-19

- The childcare bill is the largest monthly outgoing – ahead of their mortgage or rent – for a third of families
- 44% reported regularly using means other than their income to pay for childcare including savings, overdrafts, credit cards and even payday loans
- 50% of parents report that their family is ‘going without’ in order to meet their childcare costs
- Almost one third of childcare providers (32%) reported a decrease in their income in the previous year, with 72% having either just broken even or made a loss.



Parents already struggling to access the childcare they needed to work

- At the start of the year, 61% of parents reported that there was not sufficient provision of childcare in their area, an increase from 51% in 2019
- Over half (52%) of parents had experienced a change in their working hours in the previous year, and the most common reason given for this was the cost of childcare.

Inability to access childcare impacted on ability to work in the initial months of the pandemic

- 74% of parents were not able to access any childcare for some or all of this time
- 64% experienced a change to their working arrangements during the pandemic, whether that meant working from home, changing their hours of work or being placed on furlough.
- Where childcare was impacted, the effect on parents in terms of their work was clear:
 - 18% had to use unpaid leave or annual leave to manage childcare – rising to 20% of mothers, and 31% of lone parents
 - 28% had to work outside of their normal working hours to manage childcare – rising to 31% of mothers and 38% of lone parents
 - 57% had to balance working alongside childcare responsibilities - rising to 61% of mothers and 82% of lone parents
 - 2% had to leave work entirely - rising to 3% of mothers and 8% of lone parents.



Looking ahead to the longer term impact on families and on a sector that was already struggling

This has been a deeply stressful time for many parents who expressed concern at any prospect of returning to a situation where they could not access childcare, and would have to balance caring, home schooling and working. They point to the impact on their ability to work, but also their mental health and well-being and that of their children.

- 65% of parents report they would not have access to back up childcare to enable them to work if their childcare was temporarily unavailable due to Covid-19. With informal childcare options reduced, many anticipate having to use annual or unpaid leave, or leave work altogether
- By September 2020, 35% of families had been able to return fully to their normal pre-Covid-19 childcare arrangements, and this is set to rise. However, looking ahead, over a third expect to use less childcare than they did before.
- This may cause worry for the childcare sector which relies on fees from parents, and has experienced a drop in income due to the lockdown and increased costs associated with the pandemic – but is a fluid situation, which will likely continue to develop.
- While 51% of parents anticipate their employer will be more open to remote, flexible working in the future, comments from parents highlight that – for those with younger children in particular – this would not negate the need for access to affordable childcare.



“Due to the pandemic our childcare provider closed down. Grandparents were self-isolating so no childcare there. I have had to take redundancy while my partner works extra shifts.”

“The lack of childcare facilities during lockdown was detrimental to mine (as a lone parent) & my children's mental health. Working from home, trying to balance childcare was extremely difficult.”

“Because I was working around my caring responsibilities and home schooling, I had to work as and when I could and caught up when I got children to bed at night so I often had to work from 9pm- 11pm. I felt as if I had no escape from work and no work life balance.”

“Childcare remains vital for working families and if it's not accessible I feel it is a massive barrier to work for many people. It is too stressful to balance working from home effectively with small kids.”



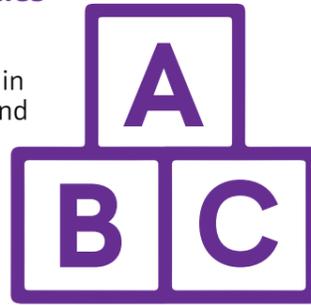
“My childminder was wonderful – she stayed open for key workers, I’d have been lost without her - they deserve a medal for what they have done.”

“Our crèche care was fantastic. They may have been shut but posted articles on their FB page and shared news from the staff... families contributed with their news and activities and a real lifeline/highlight to remain connected.”

“My employer was exceptionally understanding of my childcare responsibilities over lockdown. My husband’s employer was completely unsympathetic to my husband’s childcare responsibilities. He had to use annual leave, unpaid leave, all whilst being harassed on a daily basis to get back into the office, despite his job being a desk bound position that could be done from home... My husband had to leave his job as a direct result of us not being able to access childcare during lockdown.”

The childcare sector provided critical support for key worker parents and families

Perhaps more than ever, the importance of the childcare sector in enabling parents to access work, and in supporting the social and educational development of children, has been highlighted. Many parents also reflected on how much they had previously relied on family members – particularly their children’s grandparents – for informal childcare, and that this may change going forward.

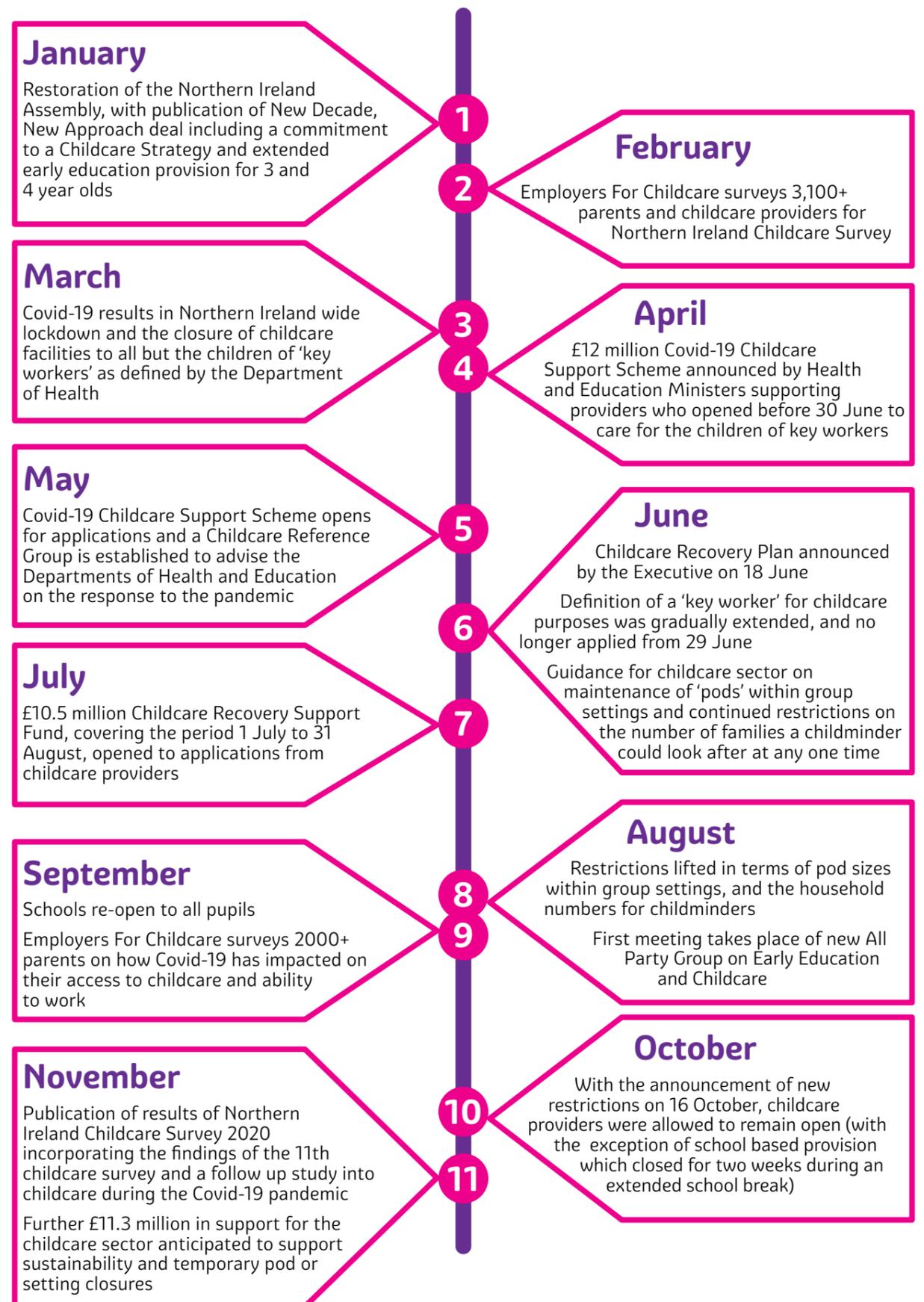


Important role for employers

- Almost two thirds of parents felt that their employer understood that they were juggling work and childcare, was supportive, and adjusted their expectations as a result.
- However, one in five felt their employer had not been supportive, understanding, or had failed to adjust their expectations. In some cases, this led to parents having to take lengthy periods of unpaid leave, or to leave work altogether.
- In important learning for employers, there is a clear link between facilitating a more flexible, agile working life moving forward and staff loyalty, productivity and overall well-being.

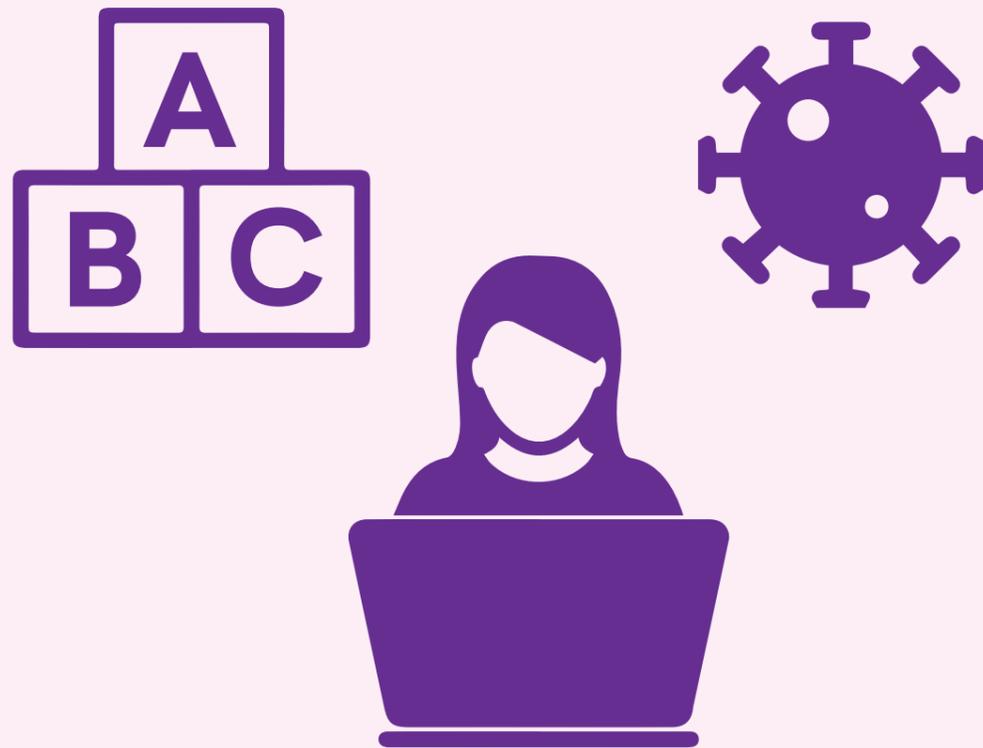


2020 timeline of key developments in relation to childcare



Section 1: Experiences of childcare and work during Covid-19

- 1.1 How was access to childcare impacted in the initial months of the Covid-19 pandemic?
- 1.2 Impact on work during the pandemic
- 1.3 Childcare arrangements in September 2020 – a return to normal, or continued disruption?
- 1.4 Looking ahead



1.1 How was access to childcare impacted in the initial months of the Covid-19 pandemic?

With the closure of registered childcare provision to all but the children of key workers (as defined by the Department of Health), and a lockdown restriction on inter-household interactions, access to childcare was a real challenge in the initial months of the pandemic for respondents to our **Experiences of childcare and work during Covid-19 survey**, and many challenges remain. This is not surprising, as the majority – 89% – accessed childcare previously. 38% relied on formal registered childcare only (for example, childminders, day nurseries and school age providers), with 24% using informal childcare only (for example grandparents), while 27% used a combination of both.

Impact of Covid-19 on childcare arrangements

Almost three quarters - 74% - of parents reported that, from April to August 2020, they were not able to access any childcare for some or all of this time, while 19% had to use a different form of childcare. Just 11% of parents found that their childcare arrangements were not impacted – typically because one or both parents were a key worker, or a parent was already providing childcare.



In some cases, parents who had not previously used childcare had to source it for the first time, due to school closures and lockdown rules.

Fewer families who have a child with a disability reported that they accessed childcare prior to Covid-19 (72%), and were less likely overall to use formal registered childcare (26%). However, the impact of Covid-19 on

these arrangements was still significant. 61% were unable to access any childcare for some or all of this time, while 22% had to use a different form of childcare. This can be a particular concern for a family where their child has a disability or additional needs, for example where the building up of trust and confidence can take time, or because there is a much greater need for stability and a routine.

"As my husband and I are essential workers we were required to find childcare arrangements during lockdown. With school closures our arrangements changed to protect vulnerable family members and therefore our nursery costs rose significantly to allow us to work."

"Child with special needs now aged over 12 - it has been difficult to access childcare at all in my area from age of 3. Now can't even manage school as so mentally unwell after 6 months of no access to education therapies or support and this remains the case post lockdown."

"Need to be as flexible as possible and changes of routine are especially difficult for children with a disability."

Access to childcare for key workers

Three quarters of families reported that one or more parent was defined as a key worker at some stage during the pandemic. The definition of 'key worker' for the purposes of access to childcare varied in the early months of the pandemic, and was initially much more limited than the definition of 'key worker' used for access to school provision. As a result, some key worker parents – such as those working in essential retail – struggled to access the care that they needed, and this also caused some confusion – both for parents, and for childcare providers.

In 75% of families one or more parent was defined as a key worker

Over time, the definition of a 'key worker' for childcare purposes was expanded and, from the end of June 2020, no longer applied. At the same time, some parents who continued to work throughout the pandemic, but were not defined as a 'key worker' expressed frustration that this meant they could not access childcare which would have assisted them, including when working from home. While access to school was a critical form of support for some families, for others, due to the school hours or due to the age of the children (under school age) this was either not an option or did not facilitate them to work.

Where parents could continue to access childcare, communication was also a priority, but alongside that parents valued flexibility and a clear approach to ensuring a safe environment for children. The vital role of the childcare sector as one which enabled key workers to provide frontline services during Covid-19 was recognised by many parents, some of whom felt not enough recognition is given to the sector.

"The childcare sector seemed to have been forgotten about during this time and it is vital to those in employment."



"As two key workers - but not within the limited range permitted to access childcare - it was extremely difficult to manage work and childcare needs. Family members were unavailable as they were in vulnerable category."

"Both myself and my partner were classed as essential workers and could access childcare facilities through school settings. However this was only available until 3pm which was of no use when you work a full day and have no other forms of childcare available."

"Child's Primary School initially did not open at all, not even for Key Workers Children. Eventually when they did open they decided that both parents had to be key workers before the child would be eligible for limited childcare."



"Formal childcare provider were very proactive in keeping parents up to date in regards to changing legislation however it appeared they had very little warning prior to changes etc."

"Our provider was great at communicating with us as much as possible over the pandemic and informing parents of guidelines and procedures to ensure a safe environment for our children."

"My childminder kept in excellent contact and when able to return to work put additional covid related measures in place to ensure the health and wellbeing of all the kids she cared for - I have had a positive experience with my childminder during covid."

However, some parents reported a more negative experience, typically where they had been asked to continue to pay for childcare they could not access, where there was a lack of communication, or where they perceived their provider was not offering the flexibility and support they needed. For others, their frustration arose either from being unable to access the childcare they needed, or at a lack of options based on their personal childcare preferences.

Parents' experiences of their childcare providers

Parents shared varying experiences of their childcare providers. For some, their provider offered vital support – including those who were unable to provide day to day care. Where parents were unable to use their usual provider, they still placed a high value on communication and greatly appreciated alternative opportunities for interaction, such as online, to assist them and their children at a challenging time.

"They made a big effort to try and help support the families and children by coming up with bed time stories read by the employees. They also put activities in place through social media."



"Childcare was not available but we had to keep paying the fees as we had a contract with the childminder and would have had to forfeit our place post-COVID."

"Unable to access any form of childcare from the months of March until present time. No information from my previous childcare facility on reopening."

"There was nothing available. I had to balance my child's needs with work. Any childcare I have chosen in the past has had my approval after several visits. I couldn't leave my child somewhere I didn't know."

Parents' concerns about impact on children

For many parents, their concerns about an inability to access childcare were based on the impact that this was having on their children, whether in terms of their social interaction, education and developmental enrichment, or concerns about mental health and well-being where children have anxieties related the pandemic.

"Childcare should be assessed as much on the needs of the children as the working parents - children need structure and routine AND education and socialisation AND assurance that they are safe and well and not a threat to adults/ grandparents."

"It is not healthy for children to be at home without any social interactions that children receive at childcare providers."

This echoes research carried out in England with childcare providers who reported concerns about the impact of the pandemic on children who had stopped attending childcare, particularly in relation to children's personal, social and emotional development.²

Use of unregistered childcare

Worryingly some parents, as a result of the closure of schools, registered childcare and lack of access to informal childcare, chose to access unregistered childcare. This is different from informal childcare provided free of charge by a family member or close friend – and refers to services provided by those who are not formally registered but who charge a fee. Unregistered childcare is not legal, and those providing this don't have insurance and have not been inspected.

"I had to pay an unregistered childminder to keep my children as my partner and I are both essential workers and all childminders I contacted were not taking on any more children when I needed it."



² https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/933836/COVID-19_series_briefing_on_early_years_October_2020.pdf

1.2 Impact on work during the pandemic

The majority of respondents indicated that, prior to the pandemic, they and their partner (if applicable) were in work. Overall, 69% of parents were employed and working full time, with 20% working part time. 80% of fathers were employed and working full time, compared to 59% of mothers, while mothers were more likely to be employed and working part time (33%), compared to fathers (4%).

In families who have a child with a disability, 65% of parents were employed and working full time, with 19% working part-time. Just over one in ten are self-employed and 4% reported that they are a carer (in receipt of carer's allowance). In lone parent households, 55% of parents are employed and working full-time, with 36% working part time.

Overall, 64% of parents reflected in the survey had experienced one or more changes to their working arrangements during the pandemic, with 36% of parents experiencing no change. An equal proportion of men and women experienced no change to their working arrangements.

Change in working arrangements during the pandemic	Overall	Fathers	Mothers
Working from home	47%	40%	53%
Hours decreased	10%	11%	10%
Hours increased	11%	9%	11%
Placed on furlough	12%	15%	9%
Made redundant	1%	2%	1%
Income decreased	10%	13%	8%
Left work altogether	1%	1%	1%

Table 1: Parents change in working arrangements during the pandemic

Over half of mothers, 53%, experienced a move to work from home, compared to 40% of fathers. These figures are in line with ONS figures which showed that, across the UK, in April 2020 46.6% of people in employment did some work at home, and that women were slightly more likely to do some work at home than men.³ One in ten parents saw a decrease in their hours of work, with an associated decrease in income.

There was no significant change in overall employment status across parents who responded to our survey from pre-Covid-19 to September.

³ www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/coronavirusandhomeworkingintheuk/april2020

	Employment status pre-Covid-19			Employment status in September 2020		
	Overall	Fathers	Mothers	Overall	Fathers	Mothers
Employed, working full time	69%	80%	59%	70%	82%	58%
Employed, working part time	20%	4%	33%	20%	4%	34%
Self-employed	9%	12%	7%	7%	11%	4%
Not employed, looking for work	1%	1%	1%	1%	1%	1%
Not employed, not looking for work	1%	0%	2%	1%	0%	1%
Unable to work due to disability	0%	1%	0%	0%	0%	0%
Carer (receipt of carer's allowance)	1%	0%	1%	1%	0%	1%

Table 2: Parents employment status pre Covid-19 and in September 2020

However it is important to note, at the time of writing the furlough scheme has been extended to March 2021, and we may expect to see more significant changes in employment status over time. October 2020 saw the highest number of redundancies for 2020, with 820 proposed and another 1,220 confirmed, meaning that 9,600 redundancies were proposed to the end of October – double the figure in the previous 12 months.⁴ Additionally, while there may have been a limited impact on overall employment status, it is clear that a majority of parents have experienced some changes to their working arrangements.

Impact on working arrangements

Where childcare arrangements were impacted, this in turn had a direct effect on many parents' working arrangements. 10% of respondents reported that they or their partner were not working because they had been placed on furlough, and this helped them to meet childcare and home-school requirements. For other parents, a difficult juggling act was required. Almost one fifth of parents had to use annual leave, or unpaid leave, to manage childcare, while over one quarter worked outside their normal working hours. 57% had to balance working alongside childcare responsibilities, while 2% left work entirely. The impact was more significant for mothers, lone parents, and families who have a child with a disability.

⁴ <https://www.nisra.gov.uk/statistics/labour-market-and-social-welfare/labour-force-survey>

How, if at all, did this affect your or your partner's work during the first months of the Covid-19 pandemic?

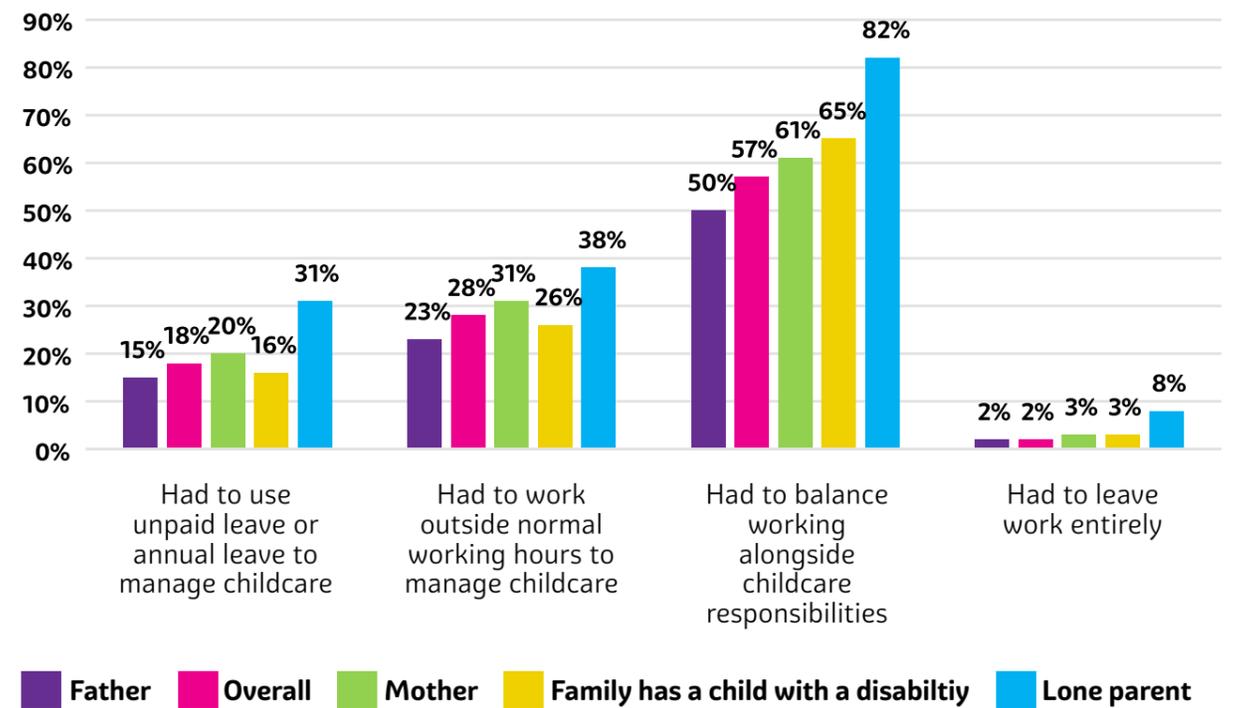


Figure 1: How did having no access to childcare impact on your or your partner's work

"When I finished maternity leave I had to use annual leave as no childcare in my area would take on a new child around April time due to Covid. Had to use 5 weeks annual leave and 2 weeks unpaid leave trying to find a childcare facility for my first and only child – this was not a good first time experience."

"Our childcare provider closed down due to unavoidable costs and Covid 19. Grandparents were self-isolating so no childcare there. I have had to take my redundancy while my partner works extra shifts."

"Extremely difficult as a single parent from England I have no family support so rely heavily on childcare through schools, childminders and so on."

"My son is disabled and I found trying to work and provide him with enough stimulation extremely difficult, I often had to stay up through the night to get caught up."

Managing childcare responsibilities alongside working from home

78% of families reported that one or both parents (if applicable) had to manage childcare responsibilities alongside working from home. In order to accommodate this, some parents adjusted their working hours during the day.

Overall in these families, 43% of parents started working earlier than usual in the morning, while 52% worked later than usual into the evening. Mothers were more likely than fathers to adjust their working hours. One third of fathers started work earlier than usual in the morning, compared to more than half of mothers. Similarly, while 42% of fathers worked later than usual in the evening, the equivalent percentage for mothers was 60%.

In 78% of families at least one parent had to manage childcare responsibilities while working from home

Did you or your partner adjust your working hours during the day to provide childcare?	Overall	Fathers	Mothers	Lone Parent
Worked earlier than usual in the morning	43%	33%	52%	61%
Worked later than usual in the evening	52%	42%	60%	66%

Table 3: If parents had to adjust their working hour to provide childcare

Where a lone parent was managing childcare responsibilities alongside working from home, they were more likely to adjust by working earlier than usual in the morning (61%, compared to 43% overall) and later into the evening (66% compared to 52% overall).

Commenting on this, many parents also reported that they or their partner had to work at weekends, or bank holidays, which they had not previously done, or used annual leave to adjust their working hours. Some parents worked out – often complex – arrangements that saw them alternating work and childcare responsibilities with each other.

“We are both still burned out from the time. We have had to take annual leave weekly, and consequently haven’t been able to take a prolonged (one or two week) break from work.”

“My husband worked 7am-1pm and I worked 1pm-7pm, allowing us to take it in shifts with the kids. This was the only workable solution, though it left us exhausted.”

“3 hours on 3 hours off alternating and evening work.”

Impact on parents of managing childcare responsibilities alongside working

Overall, while some parents reported a positive experience, the majority found that managing childcare responsibilities alongside working had impacted negatively on their ability to work efficiently (72%), their work/life balance (68%) and their overall health and well-being (70%).

	Your ability to work efficiently	Your work / life balance	Your overall health and well-being
Very positive	2% 11%	6% 21%	4% 15%
Somewhat positive	9%	15%	11%
Neither positive nor negative	17%	11%	15%
Somewhat negative	42% 72%	30% 68%	40% 70%
Very negative	30%	38%	30%

Table 4: Impact of managing childcare on parents

Terms such as guilt, stress, anxiety, balance and juggling came up time and again when parents shared their views on the experience of managing childcare responsibilities alongside working. For some parents, they were also dedicating time to home-schooling their older children. Many parents reported that, in trying to meet the needs both of their family and their work, they felt that they were unable to achieve either, leading to guilt and a sense of ‘failure’ for some.

“Felt guilty for not working at my usual standard and felt guilty for not focusing on the children when I was working. I had huge guilt trying to juggle both. Felt very torn. I was worried I would lose my job but was also worried my children were not getting the proper attention and stimulation they need to develop and be happy.”

“I felt completely torn between my duty to my family and my duty to my work/team/employer and felt that although I was trying to maintain both aspects at home full time, that I was in fact failing in both areas of my life.”

“Expecting parents to home school children whilst working full time as key workers is an utter disaster. Felt like I was failing as a parent and a professional.”

For some respondents, being a lone parent added a further challenge, making it more difficult to switch off, or to achieve a healthy balance.



"All time was dedicated to childcare or working from home as a lone parent, so I had no free time for myself to relax, unwind, exercise etc."

"As I am a single parent I was trying to juggle all the demands of working my usual hours but adapting this to suit the needs of my 2 year old son."

"Had a huge effect financially, also health & well being affected as was unable to work due to no childcare & being a single parent."

Parents drew attention to the physical and mental health impact on their families, whether through parents extending their working hours to try and make up for time lost, feeling unable to 'switch off' from work, or due to the toll of taking on full time care and schooling responsibilities in a lockdown situation, and had had a negative impact on their mental health and well-being.

"Getting up before the children to do work at 6am and working up to 11pm to try and balance the day care (2yr old) and home school (6yr old). This was particularly hard as my wife is a NHS worker and was redeployed into the care homes doing three 12hr shifts per week."

"As my husband was a key worker and was not able to use his annual leave, I took on all childcare/homeschooling responsibility. This affected mine and my child's mental health as we were stressed and some days were a constant battle."

"I started work at 5am so I could homeschool and then could be working up to 9/10 some nights."

"My mental health got worse during the pandemic. Constantly stressed and worried about how I would and will continue to maintain my life/work balance as things go forward."

"We had to put a desk in our bedroom for video calls as the kitchen table was the classroom. I started at 6am and finished at midnight with breaks during the day to homeschool, play with kids, cook, clean, do washing...I ended up in hospital in May with chest pains & my husband spent a week in hospital with very high blood pressure."

Other parents noted that, as well as combining childcare, home-schooling and working responsibilities, they had additional roles such as providing care for elderly relatives who were shielding. The sense of deep stress and anxiety felt by some parents came across particularly strongly where a family has a child with a disability.



"I work in one of the key areas responding to the pandemic so sometimes worked 18 hour days and found it extremely challenging trying to home school my children whilst managing an extremely demanding and challenging job all whilst dealing with my own fears and concerns about the virus and continuing to look after elderly parents."

"It nearly broke me. I have never been more upset and in as bad a state. I was struggling really badly due to being a single parent, having a child with a disability and two primary school kids to home school with no back up support at all."

"Balancing full time working with caring for 2 teenagers with special needs was very challenging and the most stressful time of my life."

"My son is disabled and I found trying to work and provide him with enough stimulation extremely difficult, I often had to stay up through the night to get caught up."

For parents of younger children, some expressed a sense that they had been 'forgotten about' with the availability of schools for a broader definition of 'key worker' than for childcare, which meant that more key workers with school children could access care, than those with younger children who relied on formal childcare. Others referred to the challenge of explaining to young children that, while their parents were home, they were still working.

"There should have been more support for key workers with young children. Schools opened but my child is not old enough to take advantage of this facility. Parents with babies or toddlers were forgotten about."

"As my children are very young (under 4) they did not understand that we needed to work at home and constantly looked for our attention."

While for some parents, the experience was described in largely negative terms, others had a much more positive experience. Typically, this was attributed to a reduced commute as a result of working from home, and the opportunity to spend more time together as a family. Some families reported that the situation had decreased their levels of stress and anxiety.



“Children felt lockdown was a positive experience. I homeschooled them and they benefited from having their mammy at home more. We were able to do things we didn’t have time for before- planting vegetables, going for lunchtime walks, redecorating the house.”

“I found I was able to work more efficiently from home, despite the addition of childcare responsibilities. Not having to commute to/from the office every day and being flexible with my working hours around looking after my child was beneficial to me. Removed stress.”

“I found it nice, for the most part, to be together as a family much more than we would be ordinarily. Also, to get more involved in the school work of the children. I think it was useful for them to see both of us working too and what that looked like.”

What parents said about their employers during Covid-19

Parents were asked to share their views on their employers’ attitudes during the pandemic. Many commented on the approach taken by their employers when discussing the impact that managing childcare and working responsibilities had on them and their family, in particular where they had had a negative experience. A majority of parents feel trusted by their employer to manage their time, and deliver their work (72%), and also that they have been treated fairly by their employer (63%) during Covid-19.

	I feel trusted by my employer to manage my time and deliver my work	I feel more loyal towards my employer than before	I feel that I have been treated fairly by my employer
Strongly agree	31% 72%	15% 37%	25% 63%
Agree	41%	22%	38%
Neither agree nor disagree	15%	42%	22%
Disagree	7% 13%	12% 21%	9% 15%
Strongly disagree	6%	9%	6%

Table 5: Parents’ views on their employer

Comments from parents highlight the challenges they have experienced when their employer has not demonstrated an understanding of the difficulties of juggling childcare and work. Positively, a majority– almost two thirds – agree that their employer did understand that they were juggling work and childcare, and adjusted their expectations as a result. Similarly, over two thirds of parents felt their employer was supportive of them, and was also good at keeping in touch when they were working from home.

	My employer understood I was juggling work and childcare and adjusted their expectations	My employer has been supportive and understands the challenges of working from home with children and no access to childcare	My employer has been good at keeping in touch with me
Strongly agree	28% 64%	29% 67%	27% 68%
Agree	36%	38%	41%
Neither agree nor disagree	15%	14%	16%
Disagree	12% 21%	12% 20%	10% 16%
Strongly disagree	9%	8%	6%

Table 6: Parents’ views on their employer

However, one fifth of parents disagreed, and felt that their employer had not been supportive, or understanding to the challenges they were experiencing, or had failed to adjust their expectations. In some cases, this led to parents having to take lengthy periods of unpaid leave, or to leave work altogether. Looking ahead, even where parents felt they had benefited from an understanding employer, there were some concerns that this could change as time progresses. Some parents, however, reported that their employer – or a member of their management team – had recognised the pressure that they were under, and an accommodating, supportive approach had made a real difference for them.

“Because work was insisting I come back to the workplace I found it difficult to put paid childcare in place so quickly due to limited number capacity within childcare facilities. This caused our family increased stress due to the fact we have a child with special needs and not every childcare business can manage this need.”

“Disgraceful that I had to come out of work due to no childcare being offered to myself also with no pay whatsoever I was told by management I had to take unpaid leave to look after my 1 year old daughter. No help whatsoever. Absolutely appalling that I work for the NHS and got no help or pay.”



1.3 Childcare arrangements in September 2020 – a return to normal, or continued disruption?

With the easing of restrictions over the summer months, childcare providers could gradually take back more children, and those that were closed started to re-open. The start of September also saw all children able to return to school on a full time basis.

For some parents (35%) this offered them the opportunity to return to their normal – pre-COVID – childcare arrangements. However, this has not been the case for all families. Over one third continue to use less childcare than they did pre-Covid-19, with 17% using a different form of childcare. Almost one in ten are now using more childcare than they did before the pandemic.

Thinking about your childcare arrangements now (September 2020), how if at all have they changed from pre-Covid-19?

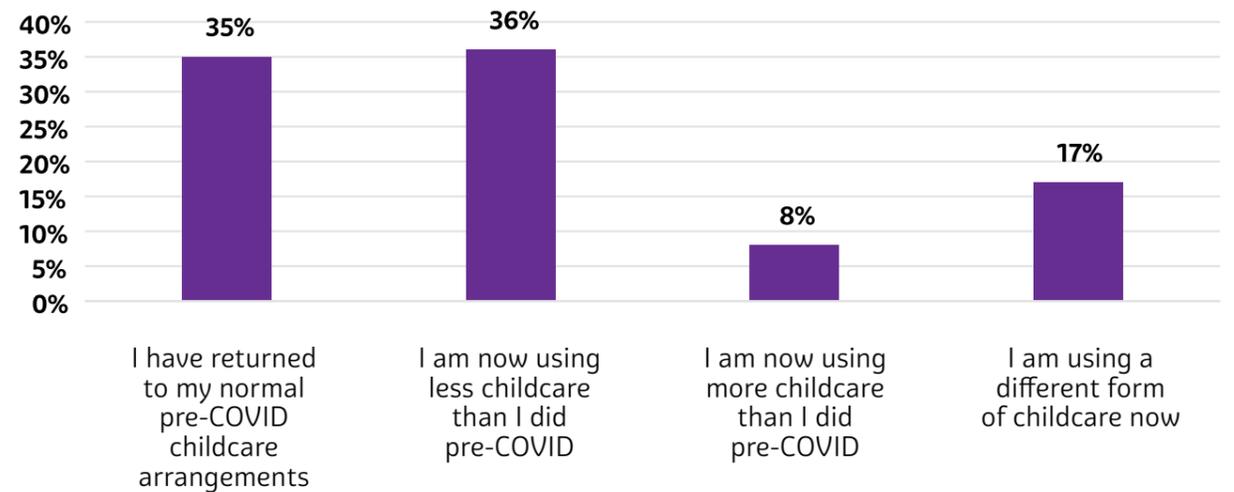


Figure 2: How parents childcare arrangements have changed from before Covid-19 to now (September 2020)

Parents gave a range of reasons to explain why their childcare arrangements continued to vary, compared to pre-Covid-19, and these reasons differ depending on the nature of the change. For example, parents who are continuing to use less childcare than before are more likely to attribute this to their working more from home while those who are now using more childcare are more likely to attribute this to informal childcare options not being available.

Where your use of childcare has changed, what are the main reasons for this?	I am now using less childcare	I am now using more childcare	I am using a different form of childcare
Pattern of work has changed	28%	29%	23%
Working more from home	59%	14%	33%
Usual form of childcare not available	25%	25%	34%
Informal childcare (eg grandparent) vulnerable to Covid-19	36%	49%	42%
Cost of formal registered childcare	9%	11%	12%
Concern about risk of Covid-19 transmission	25%	14%	25%
Changing needs of child (eg aging out of childcare or moving into school)	23%	23%	30%

Table 7: Reason for a change in childcare arrangements

Where a parent has a child with a disability, they were more likely to report that they are now using less childcare than they did pre-Covid-19 (41%) than parents overall, and to attribute a change in their use of childcare to concern about risk of Covid-19 transmission – 36%, compared to 23%.

“Although my daughter is out of childcare age, because of her disability I’m finding it hard to get an appropriate place for her where she can be safe, can’t use family in vulnerable category anymore.”

In lone parent households, where a parent reported that they are now using less childcare than pre-Covid-19, they were more likely to attribute this to a change in their pattern of work (41% compared to 28%), and less likely to relate it to their working from home (41% compared to 59%). Lone parent households also reported a greater impact where their usual form of childcare is not available.

“Being a single parent it is extremely difficult to work full time at any normal time, let alone while solely providing the level of childcare and home-schooling responsibilities that were expected during Mar-Aug. I have struggled and still have no idea how I am to manage if requested to return to my normal work duties with no childcare option yet available / affordable to me.”

How has this impacted on what parents are paying?

While half of parents reported that their childcare costs have stayed the same, compared to what they were paying pre-Covid-19, 26% reported that their costs have now increased, while 23% have experienced a decrease in costs.

“Due to working part-time I have relied on informal childcare to keep costs down. Now my kids are with a registered childminder I have little pay left over each month by the time I pay out childcare costs.”

“Fortunately my childminder was able to take my children from May but as grandparents not available and schools closed lead to increased number of days and cost for 4 children, I have used up so much annual leave to cover childcare initially, that now I am using parental leave and this impacting our finances further.”

“I have had to put both children into a registered crèche full time which tripled the cost of childcare for me. There has been no additional financial support offered to parents/families in paying for childcare.”

“With working from home and wife on furlough, our childcare costs decreased totally. With a possibility of home working, we may not need any registered childcare for the near future.”

1.4 Looking ahead

Looking ahead, comments from some parents revealed a level of anxiety and concern about what the coming weeks and months will bring, with uncertainty as to whether future lockdowns will be implemented and what this would mean for education, childcare and work. Some parents noted that the challenge of a lockdown in winter would be greater than in the spring and summer, when the weather was better and there were longer daylight hours, offering more opportunity to spend some time outside.

“Life was manageable as we had access to outside space. Life would have been much harder if the weather had been poor continuously. Children also interacted with each other in the street/gardens/houses in later stages of lockdown although adults socially distanced. This may not be possible in future and would be a concern.”



Accessing childcare

While childcare providers have been able to re-open, and children are back at school, temporary closures of settings, ‘pods’ or year groups can happen due to Covid-19, whether because of a case or a requirement for staff to self-isolate due to community contact. In this context, it is deeply concerning that 65% of parents report that, if their childcare was temporarily unavailable, they would not have access to back up childcare to enable them to work (rising to 70% of parents who have a child with a disability), while a further 10% don’t know. Just 4% of parents would have cover ‘all of the time’, with 21% anticipating that they would have cover ‘some of the time’.

If your current childcare provider is temporarily unavailable due to a COVID-19 case, do you anticipate having access to back up childcare to enable you to work?

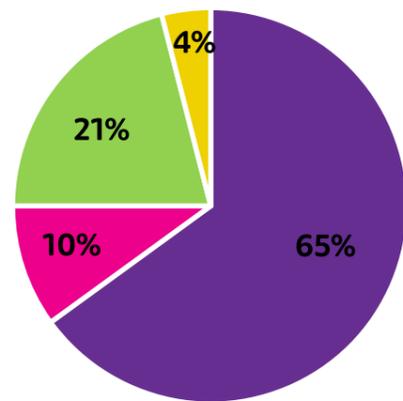


Figure 3: Parents access to back up childcare

Of those parents who indicated they would not have access to backup childcare, while some would be able to balance childcare while working from home, this is not an option for others who would have to use annual leave or unpaid leave. Lone parents would be more likely than overall to have to use paid annual leave (52%) or unpaid leave (45%) in this situation.

	Overall	Fathers	Mothers
Would be able to balance childcare while working from home	41%	31%	50%
Would have to use paid annual leave	43%	36%	48%
Would have to use unpaid leave	36%	33%	39%

Table 8: How parents without back up childcare would manage their ability to provide childcare

Parents referred to the stress that this could cause for them and their family, with some suggesting that they may have no option but to leave work entirely.

“If the situation was clearly going to be long term I would consider giving up work. My partner is the higher earner so she would continue to work.”

“Once my annual leave was used I would have to take unpaid leave in blocks....not any use at all.”

“As an agency worker I would suspect I’d find myself unemployed.”

“Both children are currently isolating due to positive covid cases in their classes. My youngest child is approaching the end of 2 weeks isolating and my eldest at the start of 2 weeks of isolation. We are therefore paying for 4 weeks of childcare that we can’t use.”

One parent noted that his family simply couldn’t cope if they weren’t able to access either formal or informal childcare, while trying to work from home, and suggested that they would seek to break the restrictions for their own mental health and well-being.

“We honestly couldn’t cope with having no childcare at all in place while trying to work similar to lockdown. If childcare facilities had to close again and we were also restricted from using grandparents for childcare purposes I would have no hesitation breaking the restrictions in order to ensure me and my wife’s mental and physical wellbeing are given priority. A sick parent is of no use to a young toddler.”

The challenge was clearly compounded for some families who have a child with a disability, with the needs of the child making it more difficult to find appropriate care, particularly at short notice.

Looking ahead, almost half of parents (49%) who responded to the survey anticipate that they will continue with their normal, pre-Covid-19 childcare arrangements. Just over one third expect to use less childcare than they did before, while 8% expect to use more. Fewer lone parents reported that they expect to use less childcare now than they did pre-Covid-19, with a higher percentage expecting to continue with their normal pre-Covid-19 childcare arrangements.



Thinking about your childcare plans looking ahead how, if at all, do you expect them to change compared to pre-Covid?

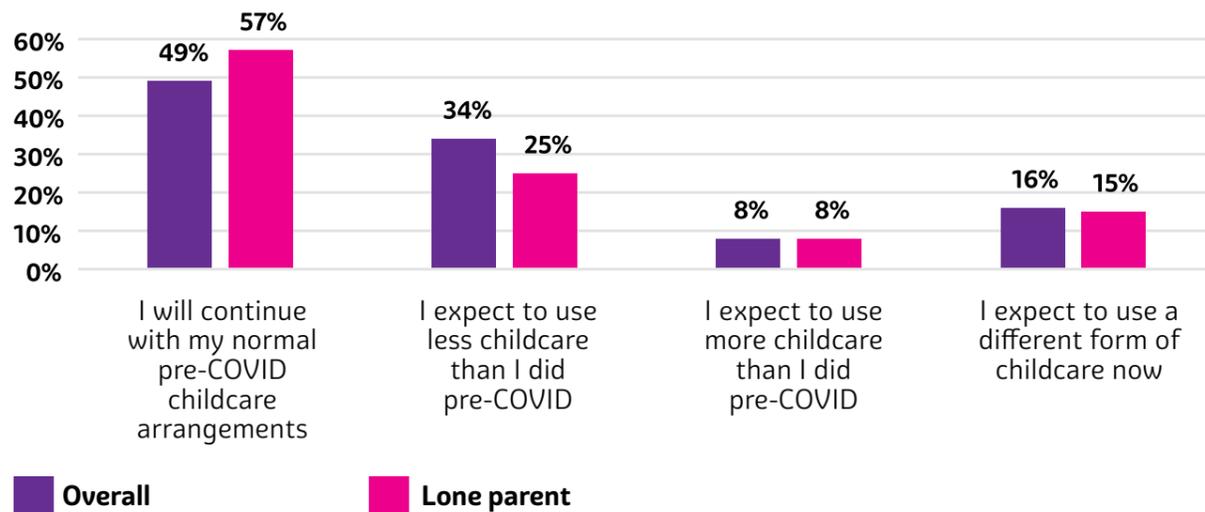


Figure 4: How parents anticipate their childcare arrangements will change

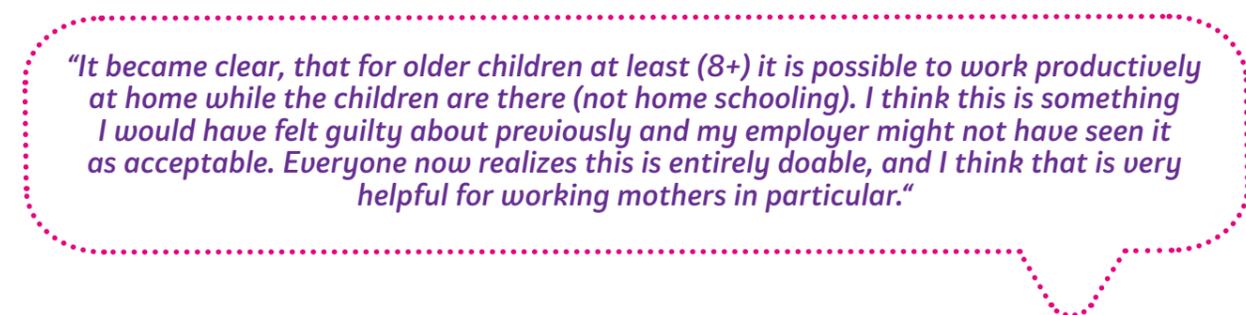
Where a parent expects to use less childcare, the prime reason for this is that they plan to work more from home. Where a parent expects to use more childcare, underpinning this for 54% of parents is a concern that their usual provider of informal childcare (such as a grandparent) is vulnerable to Covid-19, and so the parent anticipates choosing to use additional formal childcare.

Where you anticipate your use of childcare will change, what are the main reasons for this?	I expect to use less childcare	I expect to use more childcare	I expect to use a different form of childcare
Pattern of work has changed	23%	20%	20%
Plan to work more from home	53%	10%	26%
Usual form of childcare not available	20%	32%	38%
Informal childcare (eg grandparent) vulnerable to COVID-19	35%	54%	47%
Cost of formal registered childcare	14%	22%	19%
Concern about risk of COVID-19 transmission	24%	19%	27%

Table 9: Anticipated reason for a change in childcare arrangements

For lone parents who expect to use less childcare, the impact of their usual informal childcare provider (eg a grandparent) being vulnerable to Covid-19 has a greater impact on their decision making (46%), as does a change in their pattern of work (40%) and their usual form of childcare not being available (37%).

The comments from parents reveal that while some anticipate they will be able to use less childcare if they are working from home, this tends to be families with older, school age children who may find the ability to balance their work with caring responsibilities more manageable.



This was less the case for parents with younger children, particularly those who relied on access to formal childcare pre-Covid-19. Some parents sought to emphasise that, even if they were working from home, access to childcare would still be critical to them.

“I continued to work throughout the whole pandemic but was never seen as a key-worker and therefore had no access to childcare. I came close to breaking point on quite a few occasions. Childcare would have been my lifeline. ... I pray that if there is ever an unfortunate lockdown again that anyone who continues to work from home will have access to childcare.”

“It is impossible to meet the needs of minor children while working. This impacts on the whole family’s health and emotional wellbeing. Should we be placed in lockdown again, childcare providers must remain open to allow parents to work. Having schools open for keyworker children does not solve this problem for all - eg I have a toddler and a p.3 aged child with ASD. This would leave families like mine with no way to attend work.”

“There is a reason why people don’t try to work and look after children at the same time- it is impossible!”

Those parents also revealed a concern about the prospect of childcare providers closing, and being more difficult to access.

“I am still unable to find any childcare setting to place my daughter in, I have exhausted all options so now at the stage where we are in massive financial trouble and struggling to put food on the table.”

“My previous childcare provider did not re open after August. I had to source a new provider. I found this quite difficult. I suspect there is a shortage of providers now.”

Some parents also revealed their concern that while their employer was flexible and supportive at the start of the pandemic, this could change over time and could result in parents who have temporarily stopped using childcare, or are using less, wanting to increase their use, or to use an alternative form of childcare.

“I was very lucky to have an understanding employer but I imagine if lockdown restrictions return and school/childcare closes their patience might run out.”

“Think employers were more flexible about working hours etc at start of pandemic - but now even though childcare is a major problem I hear more parents saying their employers are expecting them to be available like pre-Covid.”

It will be essential for these families, and for our economy, that they can access and afford the childcare that they need.

Attitudes towards employers

Just over half of parents (51%) anticipate that their employer will be more open to remote, flexible working in the future. 20% of parents do not anticipate that this will be an option for them, while 29% don’t know. In important learning for employers, there is a clear link between employers facilitating a more flexible, agile working life moving forward and staff loyalty, productivity and overall well-being.

What impact would it have on you if your employer facilitated a more flexible / agile working life moving forward?	I would be more loyal and likely to remain with my employer	I feel it would increase my productivity as an employee	It would improve my overall wellbeing
Strongly agree	48% 84%	42% 77%	51% 88%
Agree	36%	35%	37%
Neither agree nor disagree	14%	19%	10%
Disagree	1%	3%	2%
Strongly disagree	1%	1%	1%

Table 10: How parents would feel if their employer took a more flexible approach

“I still cannot get suitable childcare due to restrictions of Covid and my employer is not being reasonable in considering some element of home working to accommodate my needs despite me having worked through lockdown at home successfully for the last 6 months.”

“Employers need to have a more flexible approach to parents with no alternative access to childcare, find a solution that will allow employees to balance work-life, which will impact on better work productivity.”

Section 2: Northern Ireland Childcare Survey 2020

2.1 The cost of a childcare place in Northern Ireland

2.2 How are families using childcare?

2.3 What are families spending on childcare?

2.4 Are families able to access the childcare they need?

2.5 Impact on work and career progression

2.6 The vital role of grandparents in the provision of childcare

2.7 Experiences of childcare providers

2.8 Views on funded childcare and pre-school provision



2.1 The cost of a childcare place in Northern Ireland

Average cost of a full-time childcare place per week

In 2020, families could expect to pay, on average, around £169 a week for a full-time childcare place. This is an increase of £3 on last year's average of £166 a week.

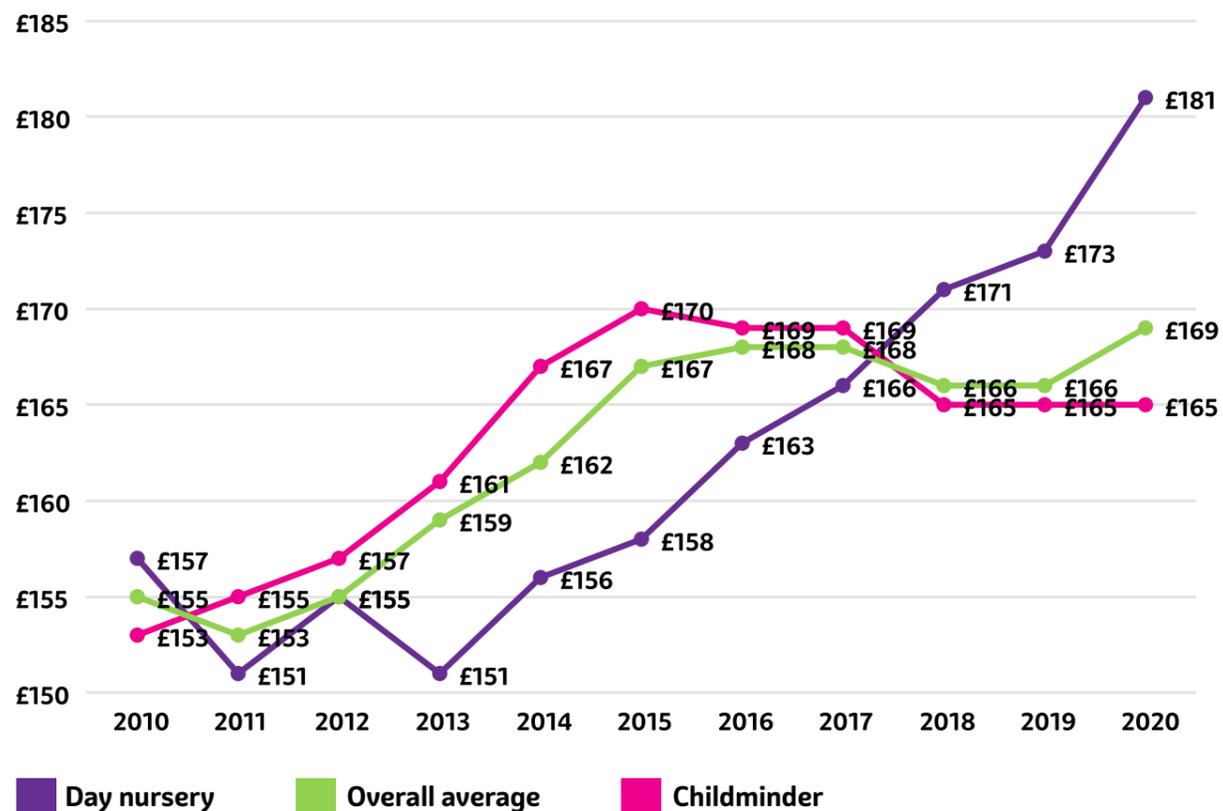


Figure 5: Full-time average weekly childcare costs since 2010

The cost of childcare varies depending on the type of childcare provision. Since last year, the average cost of a full-time day nursery place has experienced the greatest increase of £8 per week to £181. Over the last few years, we have seen a continuous trend in the cost of a childcare place at a day nursery increasing. This is understood in the context of increased staffing costs due to uplifts in the National Living and Minimum Wages, and the introduction of pension auto enrolment.

For the third consecutive year, the average cost of a full-time place at a childminder has remained unchanged at £165.

Average cost of a full-time childcare place per week	2020	2019	Change
Day nursery	£181	£173	+£8
Childminder	£165	£165	Stayed the same
Overall average	£169	£166	+£3

Table 11: Average full-time childcare costs per week

Breaking down these figures, the average cost of a childcare place as reported by childcare providers is £34 per day and the average cost per hour, for a full-time place, is £5. This is a slight increase compared to last year's figures.

While these figures present an average of the cost of a full-time childcare place per week, it is important to note that there is considerable variation both across settings and across Northern Ireland, with the lowest priced place costing £100, rising to £275 for a week.



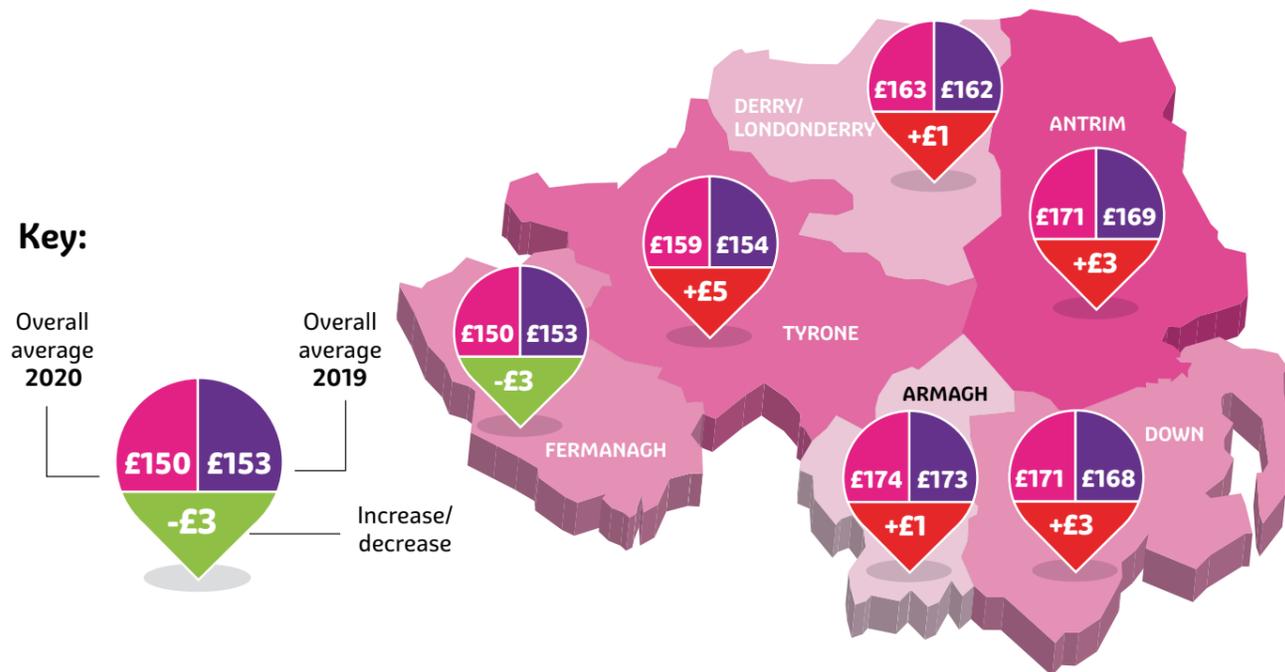
Variation across Northern Ireland

This year, we have seen an increase in childcare costs throughout most counties, apart from Fermanagh. For the fifth year in a row, the highest average cost for a full-time childcare place is in Armagh. Similar to previous years, counties Tyrone and Fermanagh have the lowest childcare costs.

This year's research shows a difference of £24 between the average cost of a full-time place in counties Armagh (£174) and Fermanagh (£150).

In Belfast, the average cost of a full-time childcare place is £182 per week.

Change in average full-time childcare costs by county in the last 12 months



Cost of out of school childcare

Breakfast clubs, afterschool clubs and holiday schemes are the three main types of out of school childcare or wraparound services. Each type is designed to cater for school-aged children to provide childcare that wraps around the school day and during holiday periods. It can be provided in private, community or school-based settings.

This year we have seen an increase in the average cost of each type of out of school provision, with breakfast and afterschool clubs seeing an average increase of £5 per week, and the average cost of a week's holiday scheme increasing by £3.

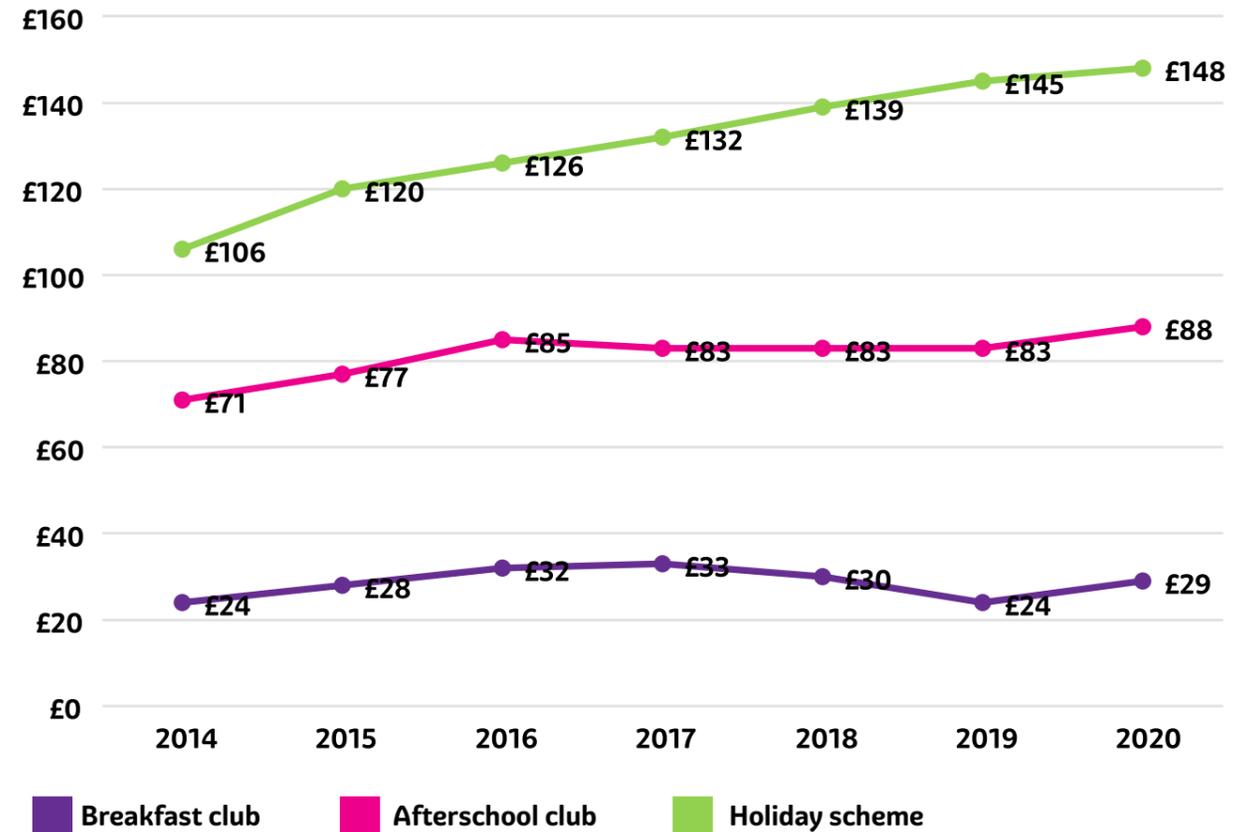


Figure 6: Average weekly cost of out of school provision since 2014

Cost per hour

On average, an hour's out of school childcare costs £5 in 2020.

Overall	2020	2019	Change
Breakfast club	£5	£4	+£1
Afterschool club	£5	£5	Stayed the same

Table 12: Average cost of out of school childcare per hour

2.2 How are families using childcare?

This year, families reported using an average of 42 hours of childcare each week. The majority of families (57%) use a combination of formal and informal childcare in an average week, while just over a quarter use formal childcare only and 9% use exclusively informal childcare. 7% of respondents told us that their household did not use any form of childcare provision and instead, they or their partner cared for the children themselves. This is a slight increase on last year's figure of 3% showing a rise in the number of families who are not using formal or informal childcare.

Families use an average of 42 hours per week

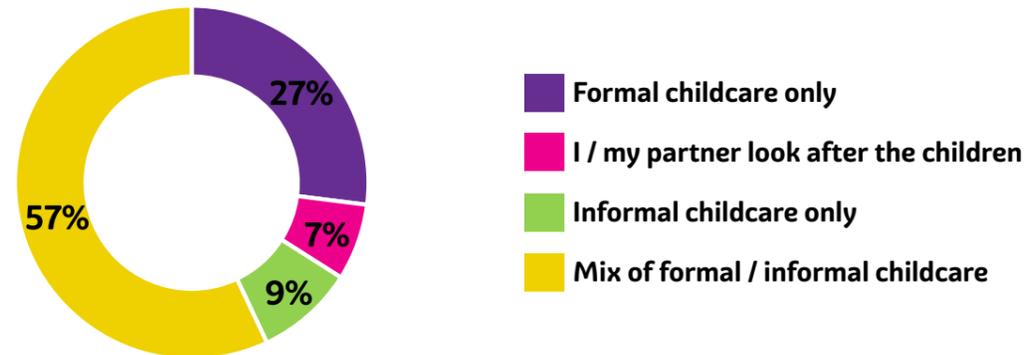


Figure 7: Childcare used by families

Lone parent households report using fewer hours of childcare on average - 37 hours compared to 42 hours per week. One reason for this could be that lone parents are more likely to be working reduced or part-time hours in order to reduce the proportion of household income that is spent on childcare. Families who have a child under five years old are likely to use more hours of childcare, with an average of 48 hours compared to the overall average of 42 hours per week.

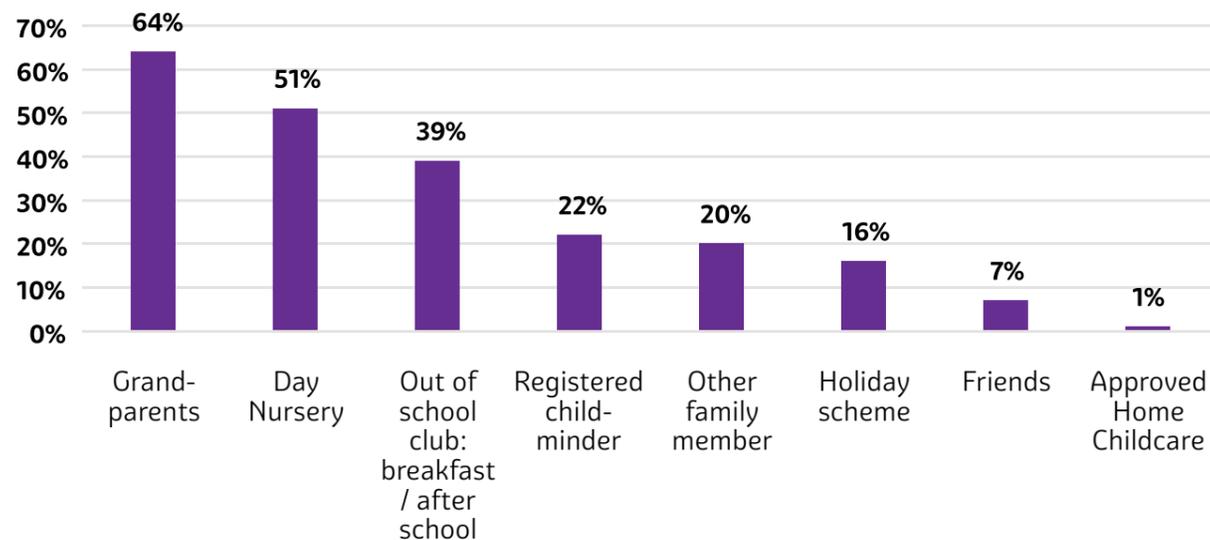


Figure 8: Breakdown of childcare usage

What influences a family's choice of childcare?

When we asked parents what influences their choice of childcare, the most commonly identified reason is a need to manage the cost of childcare. Many parents attribute their decision to combine formal and informal childcare, or to use informal childcare exclusively, to a need to reduce their overall childcare bill. Where a family reported using informal childcare only, 95% said that this was to manage the cost of childcare.

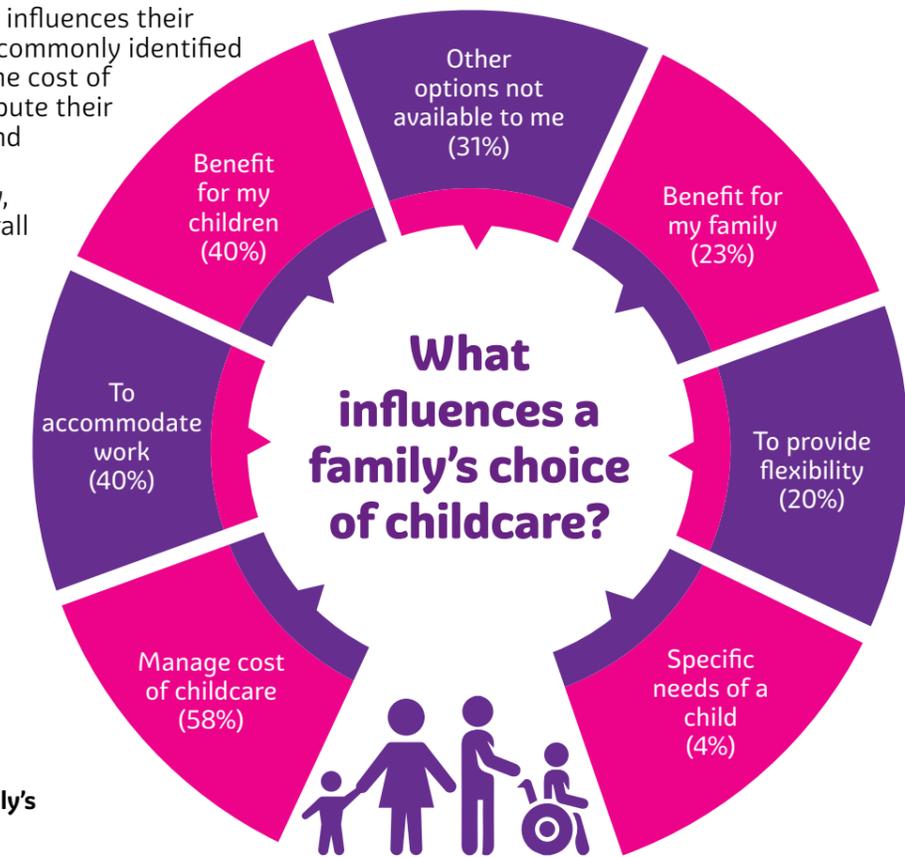


Figure 9: What influences a family's choice of childcare

For families who use formal childcare only, the most common factor - for 62% - was not having any other options available to them, which may suggest some families are not using their preferred choice of childcare.

"Cost is out of proportion to wages - I cut hours and took children out of formal childcare due to costs and I couldn't accommodate my other child due to special needs. If my mother didn't look after them on other days costs would be more than my monthly wage."

"We have four kids and are forced to use informal childcare arrangements due to the expensive formal childcare facilities. I feel more should be done to help working parents."

For some families, the specific needs of a child have a significant influence on the form of childcare they use. One third of parents who have a child with a disability said they had chosen their childcare arrangements because no other options are available to them. These parents also reported difficulties in accessing suitable childcare both in terms of finding the best support for them and in affording it.

2.3 What are families spending on childcare?

How much families report spending on their childcare largely depends on the nature of the family – such as the number and ages of children – and the type of childcare they use. While overall, on average families are spending £135 per week on childcare, families who use a mixture of formal and informal childcare spend an average of £126 per week. Comparatively, families who use formal childcare only report spending, on average, £184 per week compared to those using informal childcare who report spending an average of £38 per week.



These average figures capture a wide range of family circumstances and some will be using and paying more than the ‘average’ and others less.

Accessing support for childcare costs

For some parents, the ability to access the childcare they need depends on their ability to access financial support. This year, 72% of respondents report using some form of support with their childcare costs, meaning over a quarter of those who responded to the survey are claiming no financial support toward the cost of childcare.

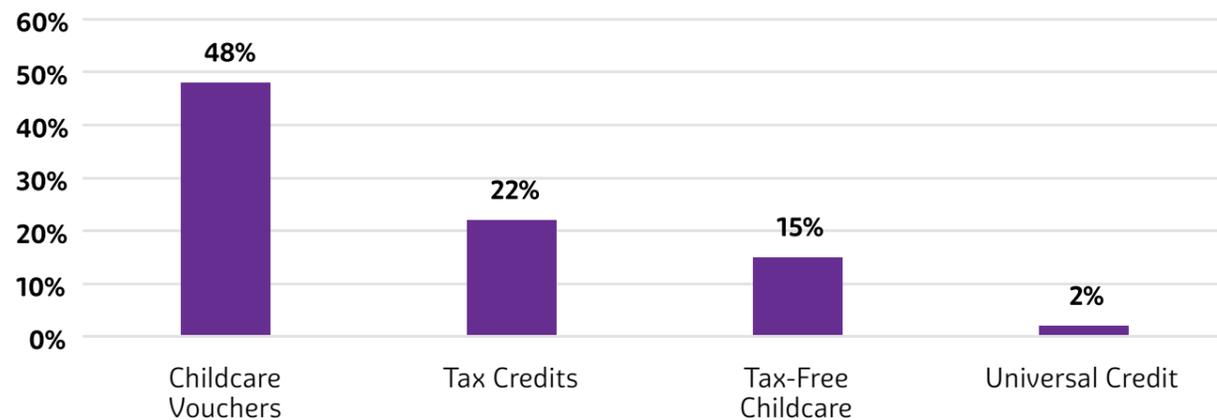


Figure 10: Forms of financial support parents access for childcare costs

Currently, there are several different options available to help with childcare costs and each option has its own different eligibility criteria which can make it difficult for parents to compare options and identify the most appropriate form of financial support for their family. While the support that is available is welcomed by many parents, the system is so complicated that some parents may miss out on support they are entitled to.

Greater awareness of financial support that is available to parents for their childcare costs can enable them to make informed decisions about childcare that best suits the needs of their family.

How does the childcare bill compare to overall household income?

For many families, the childcare bill is a regular monthly payment and can be a significant proportion of their household income. According to the Department for Communities Poverty Bulletin, the median weekly household income in Northern Ireland in 2018/2019 was £478 per week.⁵ This year, the average cost of a full-time childcare place equates to 35% of the median household income before housing costs. This is amongst the highest in the OECD countries. Looking at data from a range of OECD countries, net childcare costs represent an average of 10% of household income for a couple on the average wage, rising to 21% in Ireland and 28% in the UK. Comparatively, the figure is 16% in Finland, 6% in Norway and 4% in Sweden.⁶

Similar to previous years, almost half of families report spending more than 20% of their overall household income on childcare.

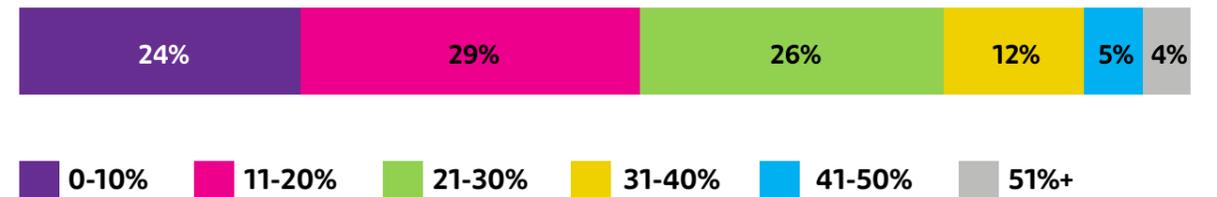


Figure 11: Percentage of overall household income parents report spending on childcare in an average month

How does the childcare bill compare to other household bills?

To understand how the childcare bill compares to other household bills, we asked parents to rank their household bills in order of highest to lowest. Over half of respondents (56%) said their mortgage or rent payments were their largest monthly outgoing. However, for the fourth year in a row, one third of respondents reported childcare as their largest monthly outgoing, exceeding their mortgage or rent payment. For 60% of parents, their childcare bill is their largest or second largest monthly outgoing.

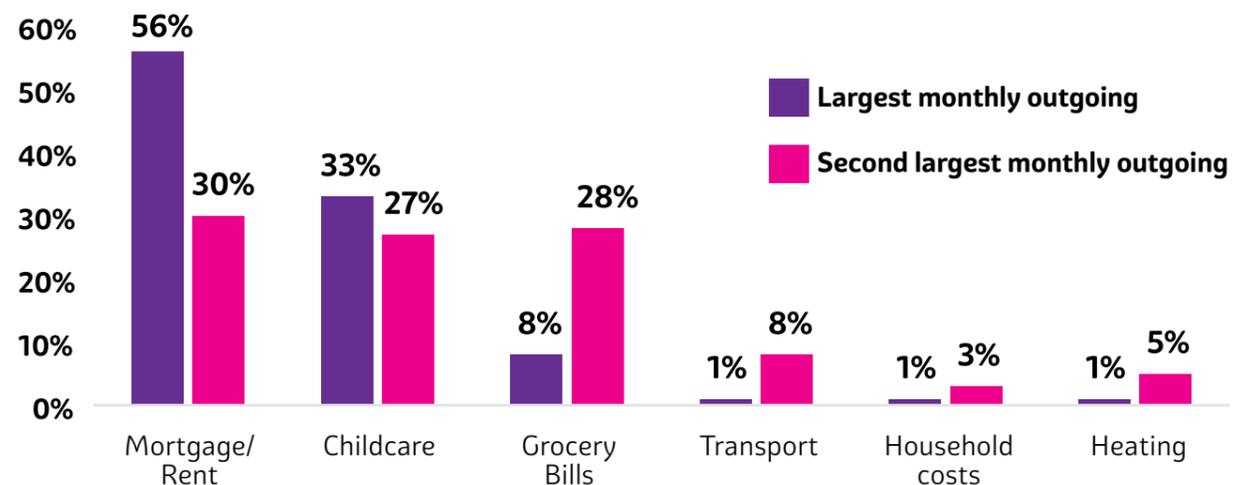


Figure 12: Parents largest and second largest monthly outgoings

⁵ <https://www.communities-ni.gov.uk/publications/northern-ireland-poverty-bulletin-2018-19>
⁶ OECD (2020), Net childcare costs (indicator). doi: 10.1787/e328a9ee-en (Accessed on 05 November 2020)
<https://data.oecd.org/benwage/net-childcare-costs.htm>

Many parents voiced their frustration that their childcare bill exceeds their mortgage or rent payment, and some families may experience this for several years, particularly in the early years before they start school. Some parents called for childcare costs to be regulated – helping reduce their overall spending on childcare and to support families in accessing childcare affordably.

*“The reality was we were paying **DOUBLE** the cost of our mortgage and it was unsustainable.”*

Using means other than income to pay the childcare bill

Continuing the upward trend marked in previous years, 44% of respondents reported using means other than their income to pay for childcare, compared to 41% in 2019 and 33% in 2018. Of those parents who had used means other than their income to pay for childcare, over two thirds reported using savings, while 44% said they had used an overdraft facility. Almost a quarter (22%) reported using a credit card where they have not paid the balance off in full, in order to pay for childcare, slightly higher than last year’s overall figure of 18%. This shows a concerning trend that more people are using credit cards than before to pay their childcare bill.

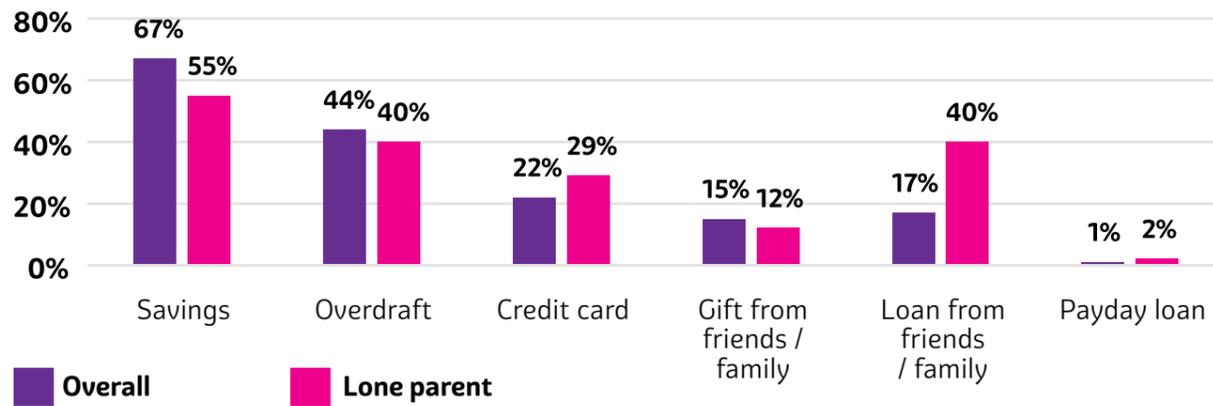


Figure 13: Means used other than income to pay the childcare bill

If we look at only lone parent households, they are more likely to turn to family and friends for a loan and to use a credit card in order to pay their childcare bill. The findings also show that lone parents are less likely to use savings to pay for childcare compared to two parent households. However, this is a rise on last year’s figure of 43% and charts an increase in the number of lone parents who resort to savings.

“I use my credit card for essentials every month such as petrol and food shopping as I am already in my overdraft and am stuck in a cycle of debt which I cannot escape.”

“We have no savings. I have had to take out a £10,000 loan last year to cover the debt of our daughter’s childcare fees for the year”

“Our childcare costs are approximately 2.5 times our mortgage this year due to the age of our children.”

“There is no money for savings or emergencies. We both earn a good wage but childcare cripples our finances.”

Cutting back or going without to pay the childcare bill

With the cost of childcare equating to a significant proportion of household income, many parents have reported having to either cut back or go without in order to pay their childcare bill. This year, half of respondents (50%) told us their household has had to go without or cut back on another expense to meet their childcare costs, an increase from 2019 when the figure was 48%. This figure is higher for lone parent households – 61% - and 57% where the family has a child under age five. Of those families who reported having to cut back or go without to pay their childcare bill, a quarter of parents (25%) had to do this ‘every month’, with more than one fifth doing so ‘most months’. For one in ten, this is needed every week.

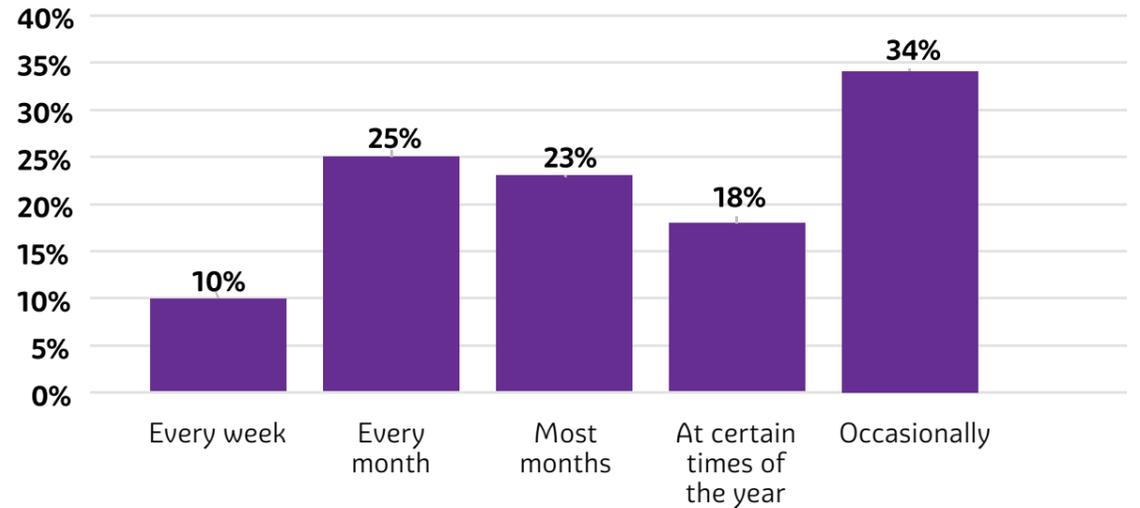


Figure 14: How often parents report having to go without or cut back in order to pay their childcare bill

While for some families this means cutting back on extras such as gym memberships, TV subscriptions or family holidays, others report having had to reduce spending on essentials such as food with some providing examples of following strict grocery budgets, reducing their grocery purchases, buying unbranded food and cutting back on portion sizes. Other parents told us they have cut back on heating or electricity in their home. One family told us they had to visit a foodbank to ensure their children were fed.

The lack of disposable income means families are unable to put money into savings or pensions for the future – reducing their long-term financial stability. While other parents said they have used overdrafts and credit cards in order to pay their childcare costs. This is both financially and emotionally stressful for parents.

“Cut back on groceries - used food bank.”

“I pay childcare at the start of the month but sometimes before the end of the month I have had to borrow money to buy food.”

“Not being able to heat the house, sacrificing meals so my daughter can eat, defaulting on finance payments.”

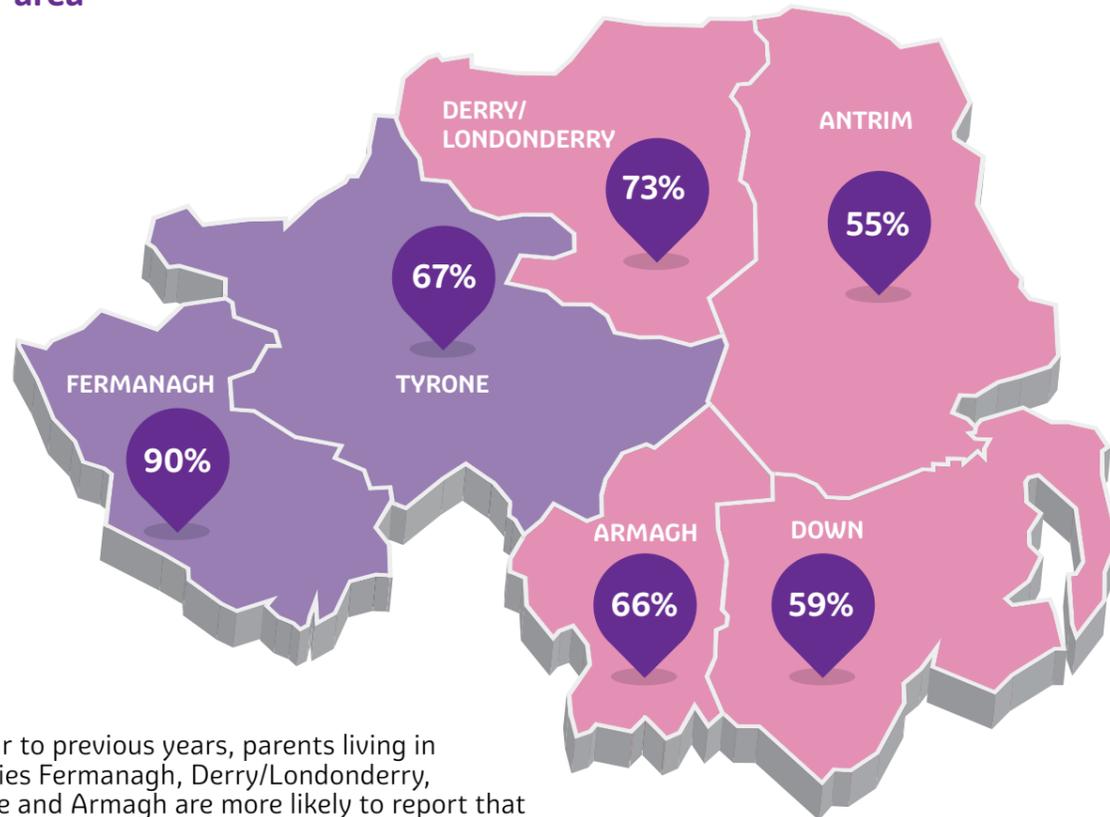
“Reduced Groceries and parents not eating proper meals towards end of month before wages.”

2.4 Are families able to access the childcare they need?

Provision of childcare across Northern Ireland

61% of parents feel there is insufficient provision of one or more types of childcare where they live. This is higher than last year's figure of 51%.

Percentage of parents who believe there is lack of childcare provision in their area



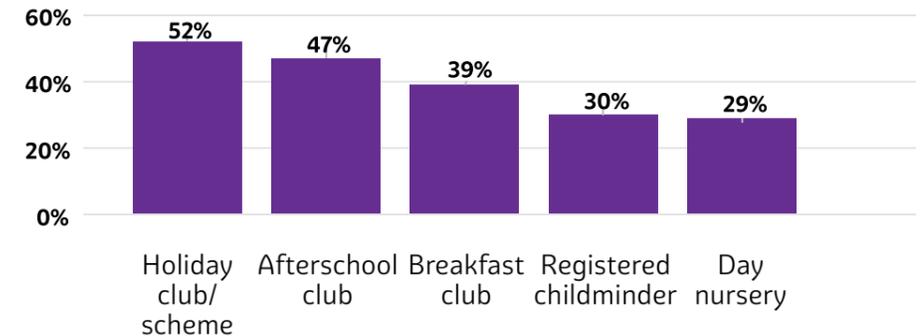
Similar to previous years, parents living in counties Fermanagh, Derry/Londonderry, Tyrone and Armagh are more likely to report that there is insufficient childcare provision in their area. This continues to be a growing trend, and we are particularly concerned that 90% of parents living in Fermanagh said there is a lack of sufficient childcare provision.

"We live in a rural area. The schools are good but there are no local breakfast or afterschool clubs. There are also no day nurseries nearby who will do after school pick-ups. This means we rely on childminders or family for drop off and pick-ups. Whilst this works for us I feel there is a lack of local childminders with most being at capacity."

"The only crèche in our rural town closed in November 2019, it has been nothing short of a nightmare finding childcare since, we have no options, the few registered childminders in the area are already full."

Over half of parents identified issues with access to out of school care, particularly holiday schemes, but also afterschool and breakfast clubs. These forms of wraparound childcare are vital for families and parents continue to voice frustration about difficulties in accessing childcare during holiday periods, particularly during the summer months.

Figure 15: Parents who report insufficient provision of one or more types of childcare



"Longer hours at breakfast club and afterschool at primary school are needed as they don't accommodate working parents at the moment."

"More provision during summer holidays - summer schemes with more places - which you don't have to scramble for as soon as they are announced."

Are families accessing the childcare that best suits their needs?

This year, a significant proportion of parents (71%) reported that their household was accessing the childcare that best suits their needs. While this is a positive figure, it means that 29% of families are not. Of concern, considerable more lone parents - 43% - report that their family is not currently accessing the childcare that best suits its needs. There are several reasons why this may be the case, with the most common reason identified as the cost of childcare, followed by a lack of suitable childcare.

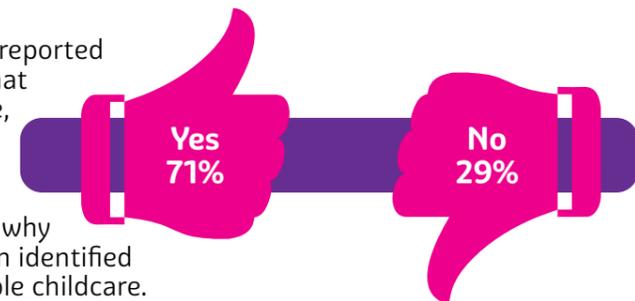
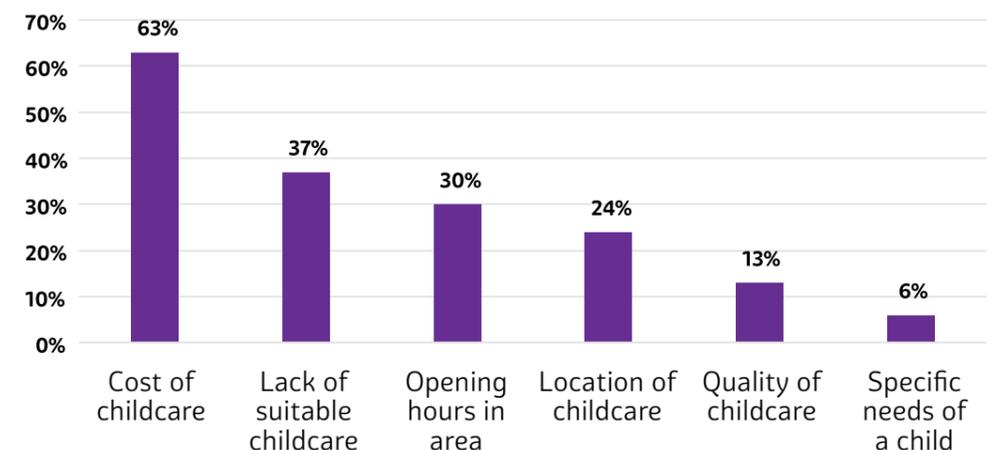


Figure 16: Reason given by those families not currently accessing the childcare that best suits their needs



2.5 Impact on work and career progression

Access to affordable childcare is essential for parents to take up or remain in work, training or education. However, where the cost of childcare equates to a significant portion of their household income, some parents may question whether they need to change their working patterns to either access or afford childcare. Where this is not possible, some parents may have no other option but to leave work altogether. In the last year, over half (52%) of parents had experienced a change in their working hours. 12% of parents had either decreased their hours of work or left work altogether.

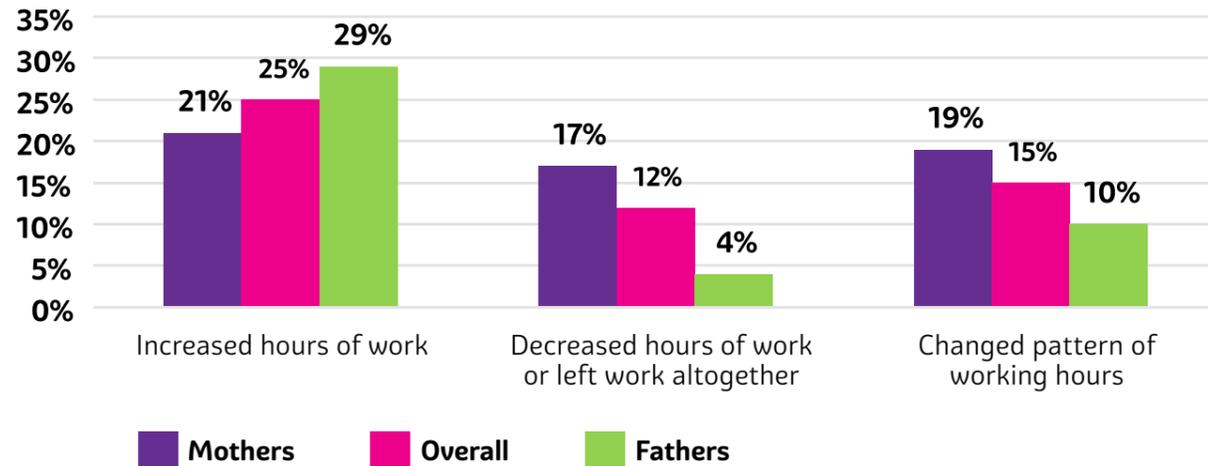


Figure 17: Reported change in working patterns

Across households, mothers were more likely to experience a change in their working hours. 17% of mothers decreased their hours of work or left work altogether compared to just 4% of fathers. Similarly, mothers were more likely to report a change in their working patterns.

Where there was a change, we asked respondents to identify the reasons for this. The most common reason was linked to the cost of childcare, with almost half of mothers (48%) citing this as a reason, compared to 28% of fathers. Almost a quarter of mothers linked a change in their working hours to the ability to access suitable childcare, while only 9% of fathers attributed this reason to a change in their working hours.

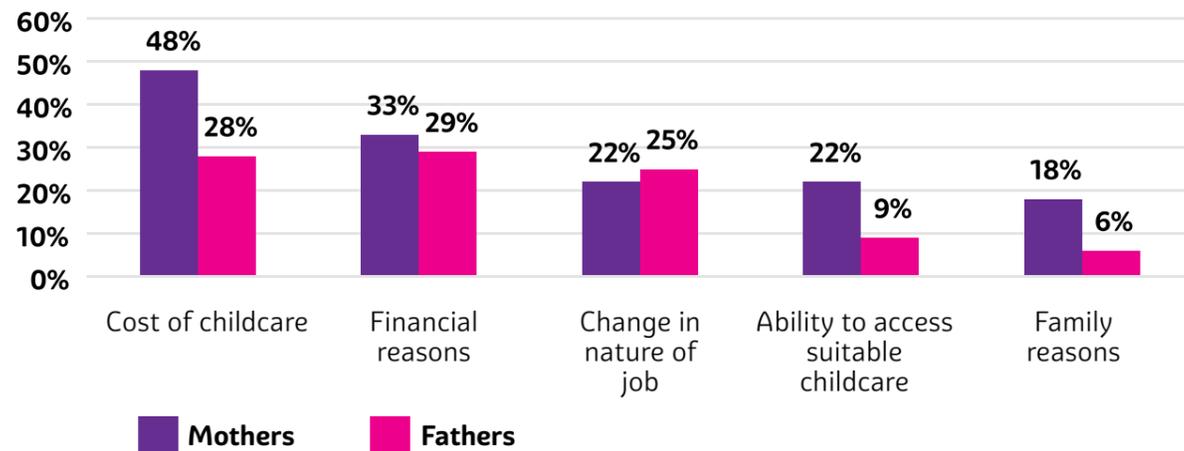


Figure 18: Reason for change in working hours by gender

Three key themes emerged from our research with parents, particularly mothers:



Career opportunities are being sacrificed

Because of traditional gender roles and pay disparities, many mothers find themselves in tough positions when considering childcare and their careers.



No financial incentive to remain in work

Parents feel they are working at a financial loss and question whether it makes financial sense for them to remain in the workforce.



Facing barriers accessing the workforce

Where childcare is not affordable this can lock parents out of the workforce or leave families in a position where one parent is working mainly to cover the childcare bill.

The relationship between childcare and employment cannot be understated. Our research highlights that it is often mothers who feel penalised in the workplace, face barriers to access the labour market and with fewer opportunities for progression. However, we need a childcare system that can promote economic participation and support families to get into and stay in the workforce.

“Typically childcare between the ages of 1 to 3 is most expensive as there is no state provision, women who take a break from employment at this stage are less likely to return to work at a later stage (loss of skills, experience and confidence).”

“Making the decision to return to work after having a baby is tough when faced with childcare costs. Many women take longer leave or leave their work as a result of crippling childcare costs with two or more children.”

“At present I am only working to pay for childcare, I want to work and have a career and be a positive role model for my children.”

“I am seriously considering giving up my career. Having went to university, paid back student loans, worked hard for 15 years to build a career, I feel I am the government’s work horse! Paying taxes, paying childcare and paying with my own stress!”

“We also have both been through university and want to put our hard work to use to develop good careers. Raising a family should be supported so that people can go to work and have a healthy work life balance.”

2.6 The vital role of grandparents in the provision of childcare

Grandparents play a prominent role in providing childcare, with 62% of respondents stating that their children's grandparents provide some or all childcare. For 81% of parents, this care was provided 'at least once a week'. Almost one third (30%) said this was at least one day a week, followed by 28% who said two days a week. 11% of respondents said their children's grandparents provide childcare five days a week. When parents identified the main reasons why they have chosen to use grandparents to provide childcare, 84% said this was to manage the cost of childcare.

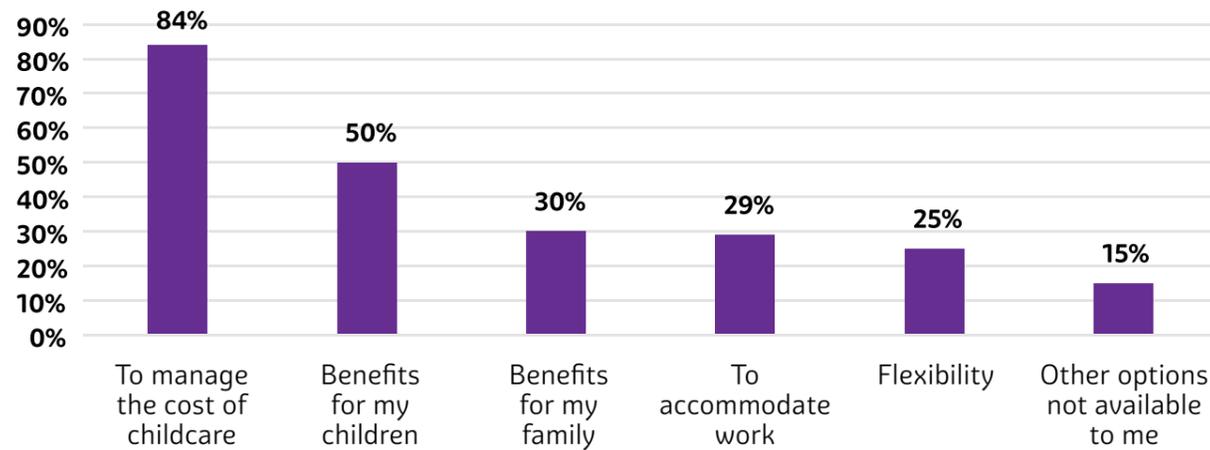
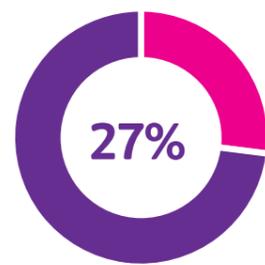


Figure 19: Reasons parents ask grandparents to help with childcare

Parents referred to the invaluable support grandparents provide, and how positive this can be for families, but also the potentially negative impact - physically and financially - for grandparents.



27% of parents said providing childcare is having a negative impact on the levels of physical well-being of grandparents.



28% of parents said providing childcare is having a negative impact on the financial well-being of grandparents.

A number of parents commented that they worry about the impact on their own parents of providing significant levels of care, but equally they are concerned for the future if grandparents are unable to continue in this role.

"If formal childcare were more affordable and available then much less burden should be placed upon the older generations."

"We have no choice but to have grandparents mind our child once a week, due to high childcare costs. The health of the grandparents can be affected because of this."

"Grandparents are a gift and treasure, I am truly lucky for my children's grandparents but at times my mental health suffers as I feel I am putting a financial burden on my in laws."

Respondents also identified benefits for children and grandparents in terms of their well-being and also their relationships:

97% of parents said this has had a positive impact for their children.

98% of parents said this has had a positive impact for their children's grandparents.

Many parents expressed real gratitude and appreciation to their parents for the support provided and emphasised how vital this is for their family. As in previous years, we heard from parents who feel grandparents should be better supported and valued, including with financial support, for example in the form of an 'allowance' to help cover the costs of day trips, school runs and other recreational activities.

"I think they should be given some financial allowance as they do a lot of the "school runs" and other activities which all costs money. Also, there should be some additional contribution made to their national insurance as they are contributing to society and enabling their sons/daughters and or/ in laws to continue in full time employment."

"Families should be able to access financial help to aid paying grandparents as formal childcare if it could be registered care/ arranged contracts etc."

2.7 Experiences of childcare providers

Financial sustainability

The role of quality childcare is vital both in supporting parents to access and progress in work, and in nurturing child development. However, childcare providers can only deliver childcare where it is financially sustainable for them to do so.

We asked providers whether, considering their overall income and expenditure in the last 12 months, they were breaking even, making a loss, or making a profit. Just over half (52%) said they were breaking even, while almost a quarter (20%) reported making a loss. This means that fewer than a third of childcare providers report having made a profit in the last year. Day nurseries were least likely to report making a profit.



Nature of provider	Making a loss	Breaking even	Making a profit
Overall	20%	52%	27%
Childminder	15%	54%	32%
Day nursery	28%	52%	20%
Out of school	30%	35%	26%

Table 13: Profit and loss by nature of provider in the last year

Fees

This year, almost three quarters of childcare providers (73%) reported that they had kept their fees the same in the last year, while just over a quarter (26%) had increased them. Childminders were more likely to have kept their fees the same, while day nurseries and out of school providers were more likely to have increase their fees. This is reflected in the average childcare costs per week reported earlier, which marked an increase of £3 in the last year.

Nature of provider	Increased	Stayed the Same	Decreased
Overall	26%	73%	1%
Childminder	13%	86%	2%
Day nursery	73%	27%	0%
Out of school	50%	50%	0%

Table 14: Change in fees by nature of provider in last year

Where there was an increase, the top five reasons for this were identified by providers as:

	Top reasons	Percentage
1.	Food, material and equipment	87%
2.	Staff costs	65%
3.	Business rates and insurance	48%
4.	Pension obligations	45%
5.	Rent / mortgage	36%

Table 15: Reasons given for an increase in fees

Day nurseries and out of school providers were more likely to identify 'staff costs' or 'pension obligations' as a driver for increasing their fees. This compares to childminders who are more likely to be working on their own, without staff costs, and reported the cost of food, material and equipment as a key reason for an increase in their fees. Overall, this is a significant increase compared to last year's figure of 60% who attributed a rise in fees to the cost of food, material and equipment and demonstrates a trend in the rising cost of living over the last 12 months.

Looking ahead: economic outlook

We asked providers if they thought the economic situation of their setting would improve, stay the same or worsen over the next 12 months. The findings paint a bleak picture, with 42% anticipating their economic situation will get worse compared to just 15% who feel that it will improve.⁷

⁷ It is important to note that this survey was carried out before the COVID-19 pandemic and does not reflect that many providers have seen a decrease in their income due to being closed during lockdown, or having less children attend their settings. Since the pandemic many providers have also experienced increased expenditure to cover the cost of PPE equipment.

Provider	Significantly improve	Slightly improve	Stay the same	Slightly worsen	Significantly worsen
Overall	1%	14%	43%	31%	11%
Childminder	0%	13%	50%	29%	7%
Day nursery	4%	11%	20%	39%	26%
Out of school	0%	28%	36%	24%	12%

Table 16: Economic outlook by nature of provider (pre-Covid)

“Parents not getting enough help with childcare so I can’t increase my fees and am struggling.”

“It is always a concern when fee increase is passed on to parents, we have avoided doing this for 3 years but with the increase in staff wages and pension contributions etc we have no other option.”

“Government should assess the bigger picture before imposing pay rises and pension obligations to determine if small business with no funding or financial support can actually maintain the costs.”

Changes to income and expenditure

In the last 12 months, 71% of providers reported an increase in their overall expenditure, compared to just 18% who reported an increase in overall income. Almost one third of childcare providers experienced a decrease in their income.

Last 12 months	Income	Expenditure
Increased	18%	71%
Stayed the same	49%	24%
Decreased	32%	5%

Table 17: Income and expenditure over the last 12 months

“Unable to pay the very loyal staff the wages they deserve due to extremely low profit margins and late payment of fees from parents.”

“Funding made available to private day care settings. Ratios in Northern Ireland are much stricter than England – this has a massive impact on business costs and staffing.”

Looking forward, over half of providers (58%) anticipate their expenditure will increase compared to only 16% who think income will increase, with 29% anticipating a decrease in their income.

Next 12 months	Income	Expenditure
Increased	18%	71%
Stayed the same	49%	24%
Decreased	32%	5%

Table 18: Income and expenditure outlook for the next 12 months

“IT’S THE PROUDEST MOMENT OF MY CAREER...TO KEEP THE NURSERY OPEN”

Jolly Rodgers Day Nursery

“As an open setting our days have been stressful at management level, my many queries to the Trust were passed to the principal social worker & we bounced many ideas, questions back & forth to each other, this was invaluable and I can only commend our working relationship during this pandemic.

The children made it all worthwhile...it has amazed us all how adaptable they were. I know 100% it’s the proudest moment of my career to have had the opportunity to keep the nursery open.

Even though it was the darkest of times for our community the nursery was a happy place. I will never forget this experience, it has changed the world, the future of the childcare sector is unknown, I would like to think that we will be recognised for the importance of our role in influencing young lives.”

Gail Rodgers Heggan, Owner, Jolly Rodgers Day Nursery



“We believe the ratios for afterschool children could be slightly relaxed. Maybe 1:9, 1:10 in some circumstances.”

“Lower the ratios- therefore staff costs reduce and staff wages can be increased, therefore rewarding staff and retaining good staff.”

“Having a register of Bank Childcare workers would be very beneficial as it’s difficult for a group to maintain available casual workers. Funding available for what a group needs would be beneficial, rather than specifying a particular expenditure for groups to apply for.”

What are the main challenges for providers and what is working well?

Childcare providers were given a range of options and were asked to identify the main challenges facing their setting in the next 12 months. The range of responses reflect the different experiences and views of providers across Northern Ireland, and the top five challenges were:

	Main challenges	Percentage
1.	Securing sufficient income to cover expenditure	55%
2.	Financial sustainability	53%
3.	Maintaining occupancy of places	48%
4.	Upkeep of buildings / facilities	35%
5.	Regulatory environment	31%

Table 19: Main challenges identified by providers

This year's findings highlight that over half of respondents (55%) are worried about securing sufficient income to cover expenditure. At the same time, 53% identified financial sustainability as a challenge. Almost third identified the regulatory environment this as a challenge with many voicing their frustrations at what they perceive is an inconsistent approach used across Trust areas when interpreting the Minimum Standards⁸. This continues to be a key concern for providers and a review of the Minimum Standards is due to commence in early 2021.

"Implementation of Minimum standards continues to ensue high quality care and service delivery in this sector. Well trained and highly qualified staff are encouraged to remain within the team, resulting in excellent staff retention within our nursery."

	Working well	Percentage
1.	Liaison with parents	80%
2.	Maintaining occupancy of places	33%
3.	Regulatory environment	29%
4.	Business management skills	24%
5.	Upkeep of building / facilities	21%

Table 20: What is working well for providers

The majority of childcare providers (80%) told us their relationship with parents was the main thing working well for them. Many stressed the importance of a good relationship with parents, particularly as some providers are recommended by word of mouth and this can help them maintain their occupancy of places.

⁸ Childminding and Day Care for Children Under Age 12 Minimum Standards (Health and Social Care Board, 2012) <http://childcarepartnerships.hscni.net/wp-content/uploads/2019/02/early-years-standards-full-version-Updated-October-2018.pdf>

2.8 Views on funded childcare and pre-school provision

This year, for the first time we asked parents and childcare providers to provide their views on funded childcare provision. Northern Ireland remains without access to specifically funded childcare schemes available elsewhere in the UK however, children are entitled to a funded pre-school place of at least 12.5 hours per week for 38 weeks in the year before they start primary one, which many parents view as an important piece of their childcare jigsaw. This allocation can only be taken at specific times on weekdays, during term time. Places are typically provided by nursery schools, primary schools with nursery units and some voluntary and private providers. However, the Department of Education's guidance stipulates that funded pre-school places are not regarded as 'childcare'.

Four key themes emerged:

1. The amount of time allocated for a pre-school place is not enough

Many parents felt the amount of pre-school provision is not sufficient.

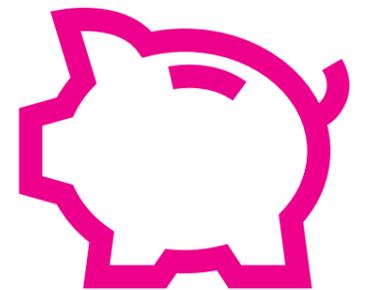
"12.5h per week is not enough. Often it makes life harder for working parents having to move their children from a pre-school with a funded place to some other form of childcare."

"For all 3 of my children, I was lucky enough to be able to avail of approx. 20 hours funded pre-school child care. I think any less than 20 hours is not enough. Also, all parents should be offered the same amount of (funded) hours per week."



2. Pre-school places can create additional childcare costs for parents

As pre-school places are usually taken either in the morning or afternoon, this means some parents must still hold a childcare place to wraparound the pre-school provision, and in some cases this can equate to a full-time childcare place. Many parents told us how their childcare costs have actually increased in order for their child to access a pre-school place. At the same time, parents emphasise the importance of early learning and are keen for their child to attend pre-school, particularly to prepare them for primary school.



"Can be very difficult to manage. At the time I had to pay for morning and afternoon childcare sessions even though my child went elsewhere for 2.5 hours to a funded place. It didn't reduce my costs as he attended part of the morning and part of the afternoon session so I still had to pay for both."

3. Reform the pre-school admissions criteria

This was an important point many parents made, with some explaining the difficulties of accessing their preferred pre-school place and many called for the criteria to be revised.



"Funded pre-school places should be the same for all children, with the same basic 'criteria' for entry and appreciate that working parents struggle too with childcare support and supporting their families."

"Ensure ALL children have access to this important resource. Should not have to be prioritised."

4. Deliver on the commitment to funded childcare for families

While there was universal consensus that there should be provision of free or 'funded' childcare for families, there was less agreement on whether – and if so, how – this should be prioritised. While almost two fifths of parents believe working parents should be prioritised, this was closely followed by 35% who said no family should be prioritised over another.



We also asked childcare providers for their views on funded childcare provision and almost half of providers (47%) believe government funded childcare should be universal, for all children to access.

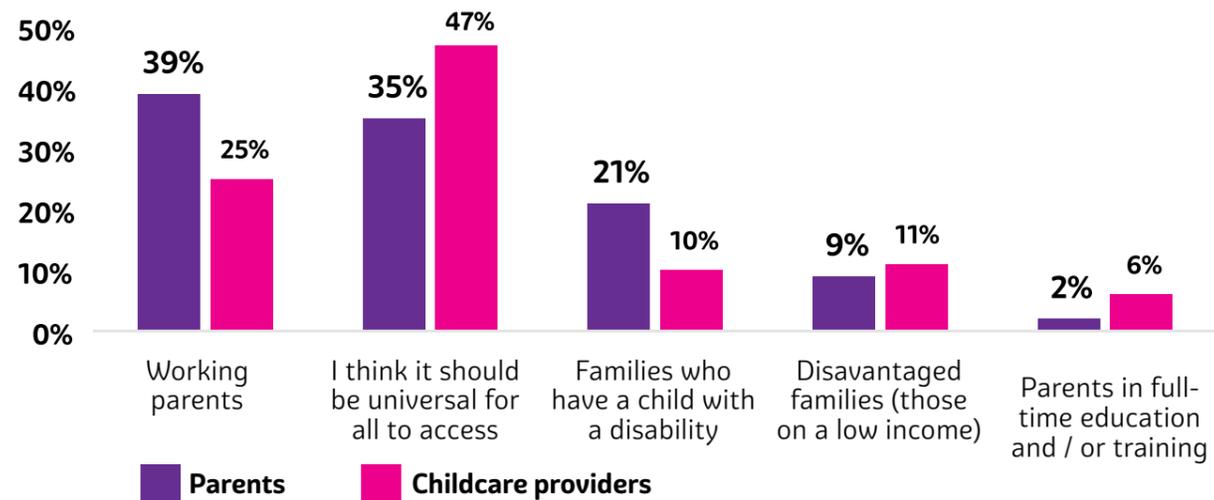


Figure 20: Which of the following families do you believe should be prioritised for Government funded childcare?

A significant proportion of parents (61%) said there should be no prioritisation for specific age groups, however where parents suggested an age group should be prioritised, this was more likely to be for 0–2 year olds, followed by 3–4 year olds. This is perhaps unsurprising considering that families are more likely to report spending more on childcare for younger children. Over half of childcare providers (59%) said funded childcare should be prioritised for all ages.

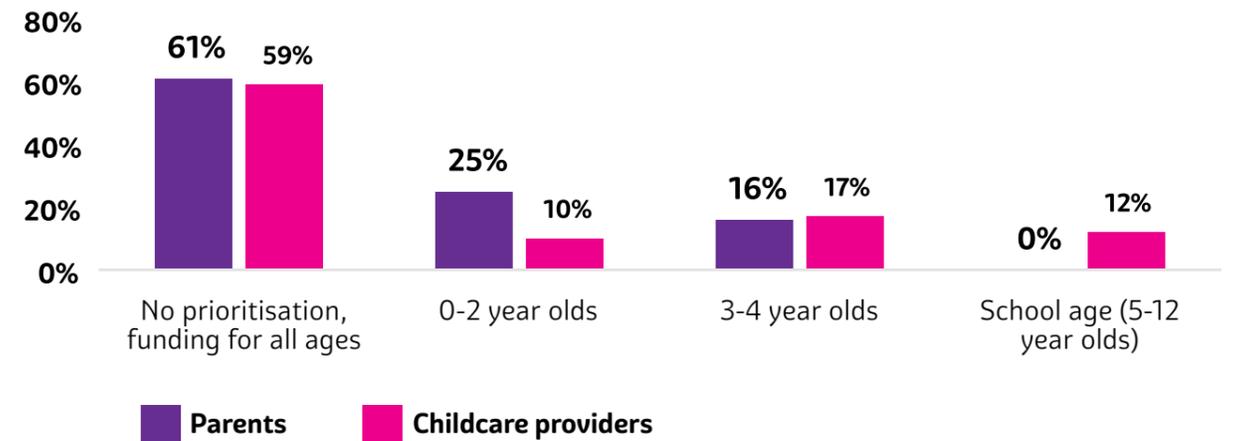


Figure 21: Which of the following age groups do you believe should be prioritised for Government funded childcare?

Providers were also asked who should be able to access funding to deliver early education and childcare. The same percentage of respondents - 67% - suggested pre-school settings and registered childminders, followed by 54% who said day nurseries and 41% out of school providers. This highlights support for all types of provider to be involved in the delivery of free or 'funded' childcare.

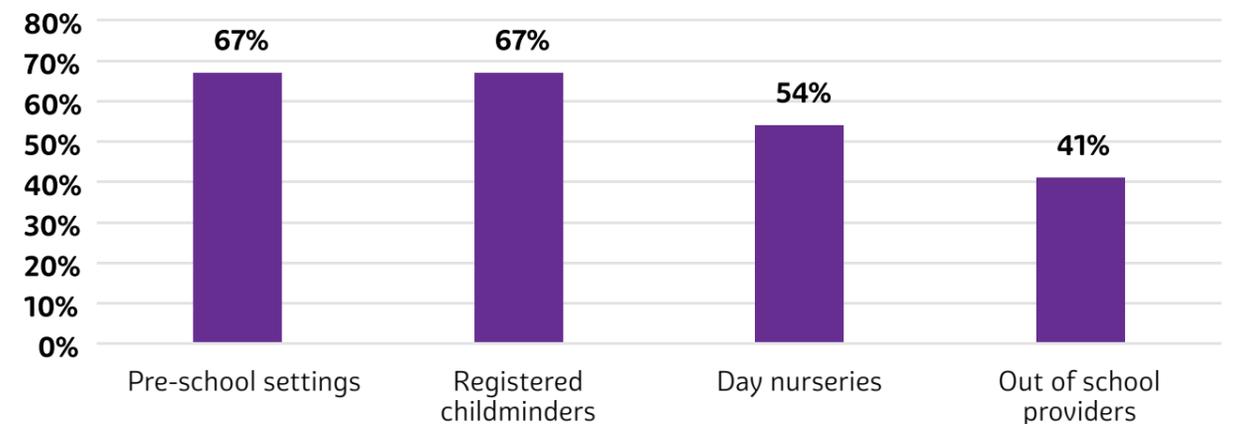


Figure 22: Who should be able to access funding to deliver early education and childcare?

While the current system of pre-school places are provided by nursery schools, primary schools within nursery units and some voluntary and private providers, this provision cannot be delivered by registered childminders. This is a source of frustration for childminders, who are therefore unable to access funding for this provision, and also point to this as limiting choice for parents.

"I consider the current system not fit for purpose - it does not permit freedom of choice for parents."

"We don't get funding for 2 year olds which nursery units attached to schools do get. The whole system needs revised as there is absolutely no equality."

"I'm a childminder, we don't get funded pre-school places however like England I think this should be available to childminding settings."

Section 3: Conclusions



DEBORAH LOVES HER JOB AS A CHILDMINDER

“

I've been minding for 21 years now. At first I thought my business is finished and I will not be able to have any of the children. Then came the parents' messages and questions – questions I couldn't answer. The next morning I was in touch with NICMA and they have been wonderful.

I was told I could look after key workers' children, to the relief of my 2 key worker families. Not once did it cross my mind not to mind them as I knew my parents would have been really stuck if I hadn't taken them...

It's been a long road to get to where we are today, but we have had some amazing fun along the way...we have had time to bake, make many wonderful things, garden and at times just sit with the children and talk to them.

What I have learnt from this pandemic is how lucky I am to be a childminder and how lucky I am that I can continue to do a job I love.”

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Overall, both parents and childcare providers identified issues within the current system of preschool provision. Additionally, parents continue to be frustrated that there is limited access to funded childcare in Northern Ireland compared to other parts of the UK. Particular reference was made to the availability of 30 hours free childcare which was introduced in England in 2017. Three years on, and parents continue to voice their disappointment that they are unable to avail of this scheme or a similar model.



“Covid -19 has highlighted the value and importance of affordable reliable and flexible childcare for working families.”

“If there is another lockdown childcare should not be closed. The early years are so important in children’s long term development. Since going back to crèche our child’s behaviour, demeanour and confidence have increased again.”

“It has shown the vulnerability for families, either paid childcare was closed or people relying on family for childcare did not have this available.”

“Grandparents definitely do not get enough recognition for the childcare they provide which allows parents to continue to work, I think the pandemic has highlighted the huge number of families who are reliant on grandparents to provide childcare and the impact to the workforce when they are unable to do so.”

Conclusions



The findings from these two surveys, one carried out prior to the Covid-19 pandemic, and one six months in, provide a valuable insight into the childcare challenges of 2020 – those which it is clear existed prior to the pandemic, and those that have been exacerbated by it. What emerges is a strong call from parents and childcare providers, for strategic investment in this essential sector, to ensure that quality childcare is sustainable, accessible and affordable.

Parents have issued a plea to Government not to limit access to childcare during any future potential lockdown, and for the vital role of childcare to be recognised as supporting them to work, assisting in the educational and social well-being of children, and facilitating mental health and well-being – both of parents and of children.

In the words of one parent, families were ‘vulnerable’ in the absence of childcare, highlighting how reliant so many of us are both on our formal childcare infrastructure, and our family networks.

Looking ahead, there is a strong consensus that the Government needs to take robust action to support families and the childcare sector, and that clear communication is key, in particular to mitigate the disruption of school and pod or setting closures due to Covid-19, with children sent home to self-isolate, or settings closed due to staffing issues.



This research has highlighted the struggle for many families during an already stressful time when parents were seeking to manage work, care for children at home for an extended period of time, and deliver home-schooling. Parents are

concerned that this struggle cannot be perpetuated in future, and that the Government needs to prioritise the childcare and education sectors, for the well-being of children and parents, and to ensure that the economy can rebuild.

The Covid-19 pandemic has increased the strain on a childcare sector that, as is shown by our findings, was already struggling – in need of investment and a long overdue Childcare Strategy, as committed to within the New Decade, New Approach deal. The crisis has exacerbated these challenges, impacting negatively on the financial sustainability of providers – a majority of whom were either just breaking even or making a loss even prior to the pandemic - and have subsequently experienced a significant decrease in income, operating now with increased challenges in terms of occupancy, staffing levels, cost of infection control measures and potential for temporary closures. This



research also puts a spotlight on the many childcare providers who stepped up as part of the critical services responding to Covid-19, by remaining open to care for the children of key workers, providing a lifeline of support to families.

It is important to acknowledge that the Government has provided welcome financial support to assist the childcare sector in Northern Ireland to re-open and recover during the height of the Covid-19 pandemic. Further support is planned, to assist in the ongoing sustainability of the sector. However, in responding to the evidence in this report, based on the experiences of thousands of parents and childcare providers in Northern Ireland, the Northern Ireland Executive must build on this support to finally agree and publish a fully costed, comprehensive Childcare Strategy – one which parents and providers have been calling for, for years. Already long overdue, the challenges to the sector, and for families, which were building in its absence have been exposed and magnified by Covid-19. While the Covid-19 childcare support schemes provide some stability in the short term, without a robust strategy, the risks are clear:



- A collapse in the supply of quality childcare and increase in costs for parents and providers
- Parents having to reduce their hours at work or leave work altogether
- Our overall economic and societal recovery from Covid-19 will be held back
- Increase in levels of household and child poverty
- Prolonged negative impact on the social and educational development of our children.

Our key ask: **Employers For Childcare**



On behalf of parents and childcare providers:

- Continue to provide ongoing financial support to sustain the childcare sector at this time
- Set out a concrete timeframe for the finalisation of a Northern Ireland Childcare Strategy, incorporating learning from the Covid-19 pandemic, together with the existing evidence base – ensuring publication before the end of 2021
- Provide reassurance that families will be able to continue to access childcare during any future potential lockdown
- Ensure that childcare is embedded in all Covid-19 recovery plans – recognising its vital role to the economy and to society as a whole.

“It is and continues to be very stressful trying to organize and plan childcare when the situation is continually changing. Currently my child’s crèche is closed for a week due to covid leaving me at short notice without childcare but still having to pay for that childcare which is extremely expensive and unfortunately is likely to continue to happen, probably with the result that I will be paying for childcare whilst taking unpaid leave to look after my child.”

“Disappointing level of communication from executive.”

“There should have been more support from the government during the lockdown to aid working parents with no childcare at all. Perhaps an extension of paid parental leave rather than us having to forfeit our annual leave to cover childcare. I think the treatment of working parents during this time with no childcare was very unfair.”

Appendix 1: Methodology and profile of respondents

Data collection took place in two stages:

- Northern Ireland Childcare Survey – with parents and childcare providers: February- March 2020.
- Follow up survey focused on the impact of the Covid-19 pandemic on the ability to access childcare – with parents: September-October 2020.

Overall, from the two surveys we received 5,199 responses from parents and childcare providers. Participants were invited to take part in an online survey questionnaire. The online survey was widely circulated across a range of networks and shared on social media. Participation in the survey was voluntary, and all individual responses were anonymised. All data collected was analysed using Microsoft Excel.

Childcare providers

In total, we received 483 completed responses from childcare providers. 28 day nurseries were also registered as out of school providers (after school and breakfast clubs), the 28 are included in both categories. Percentages are therefore calculated based on a figure of 527. The breakdown of responses in terms of nature of provider is reflective of the population of day care providers in Northern Ireland in that the largest proportion of respondents are registered childminders. We have sought to secure a higher proportion of day nursery and out of school childcare providers in the sample to ensure our findings are representative and meaningful.

Parents

Overall, we received 4,716 responses from parents – 2,627 for the Northern Ireland Childcare Survey and 2,089 for the Covid-19 parent survey. Projections from NISRA suggest there are approximately 215,800 households with children in Northern Ireland, therefore each survey had a robust sample with a margin of error at a 95% confidence level of approximately 2%.

Respondents were located from across Northern Ireland and represented:

- Two parent and single parent households
- Parents from an ethnic minority background (35)
- Parents of a child with a disability (5%)
- Households from all income brackets
- Rural and urban households.

Appendix 2: Key terms

Formal childcare: As defined in the Children (NI) Order 1995, formal childcare refers to people running day care services, used by children aged under 12 and open for more than two hours a day. Day care services include facilities such as day nurseries, play groups, out of school clubs, holiday schemes and crèches, childminders who look after children aged under 12 for more than two hours a day in a private house. Formal childcare can be provided either in private settings or in community / voluntary based settings.

Informal childcare: This generally defined as care arranged by the child's parent either in the child's home or elsewhere, and is provided by relatives, friends, neighbours or babysitters and is unregulated. It is referred to as informal care because the arrangements are not formalised with contracts or employment rights and are not registered with the appropriate authority.

Childminder: Registered childminders are self-employed carers based in their own home. They must be registered with their local Health and Social Care Trust (HSCT). Once registered, annual inspections are carried out by the HSCT. For new applicants references and health checks are required, as are police checks on all individuals in the household over the age of 10. Registered childminders can be registered to care for up to 6 children between 0-12 years of age (this number includes their own children).

Day nursery: Day nurseries may be privately owned businesses, or run as charities or in community settings, and offer a structured approach to childcare. They must be registered with the HSCT and once registered are inspected annually. Day nurseries must follow staff to child ratios as set out by the HSCT and can accept children as young as 6 weeks old.

Out of school club: This refers to a range of childcare provided before and after school and during school holidays. Clubs can be run by schools, private businesses or community groups. There are three main types:

- **Breakfast club** – open in the morning before school.
- **Afterschool club** – open after school until around 6pm.
- **Holiday scheme** – open during the holidays with varying opening hours.

Employers For Childcare

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