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# Mapping the Childcare and Play Workforce

## Phase 2 report

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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# Mapping the Childcare and Play Workforce Phase 2 report

Alma Economics



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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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## Acronyms

<b>ALN</b>	Additional learning needs
<b>CIW</b>	Care Inspectorate Wales
<b>LLWR</b>	Lifelong Learning Wales Record
<b>NDNA</b>	National Day Nurseries Association
<b>NMS</b>	National Minimum Standards
<b>ONS</b>	Office for National Statistics
<b>PACEY</b>	Professional Association for Childcare and Early Years Cymru
<b>SASS</b>	Self Assessment of Service Statement
<b>SCW</b>	Social Care Wales

## **1. Executive summary**

### **Background**

- 1.1 The Welsh Government has the ambition to provide good quality early childhood play, learning and care to all children in Wales. To deliver this commitment, it is vital that an accurate picture of the childcare and playwork workforce is obtained.
- 1.2 Alma Economics has been commissioned by the Welsh Government to map the childcare and playwork workforce in Wales to understand the current and future composition of the sector's workforce. This research consists of (i) analysis of data sources to understand the current composition of the childcare and playwork workforce; (ii) projecting future workforce needs in relation to expected changes in demand and policy; and (iii) engagement with members of the childcare and playwork workforce through a survey, interviews and focus groups to understand their experiences in the sector. This report details the findings from the second phase of research, focussing on the projections of the workforce and results from the workforce engagement exercise.

### **Approach**

- 1.3 Fieldwork was undertaken with childcare and play practitioners and managers which sought to provide a range of insights into the sector's workforce. As part of this, a survey of practitioners and managers in the childcare and play sector was launched between August and September 2023. Members of the workforce were invited to respond via newsletters distributed by Care Inspectorate Wales (CIW) and email invitations to all registered settings with publicly available contact details on the CIW website. Survey respondents were also invited to participate in a focus group or interview to explore their views in further detail. In total, 624 workforce members responded to the survey, of whom 29 members went on to participate in interviews and focus groups. We also developed a model to project the demand for childcare and play workers, based on expected policy changes and scenarios.

### **Summary of findings**

- 1.4 During the fieldwork, participants consistently highlighted the rewarding experience of working with children and the wide-ranging influence their work has on children's development. Over 65 per cent of survey respondents reported feeling "satisfied" or "highly satisfied" in terms of their level of personal contentment working in the sector. It was also reported that demand was sufficient across most settings, with

many locations experiencing waiting lists. Several participants reported that their settings had expanded their numbers of staff and children throughout recent years.

- 1.5 However, all fieldwork participants described the sector as in a “worrying” or “bad” state, most frequently emphasising concerns relating to funding, pay and remuneration, recruitment and retention, as well as lack of recognition of their work. For example, 15 per cent of survey respondents described themselves as being “dissatisfied” or “highly dissatisfied” in terms of their level of contentment in working in the sector. Several participants reported feelings of being underappreciated and under-supported during the Covid-19 pandemic, citing an increase in “trauma” among children and “anxiety” among staff members over this period.
- 1.6 Respondents frequently discussed recruitment and retention of workforce members as a particular challenge when asked about the state of the sector, with almost 70 per cent of survey respondents reporting at least one vacancy in their setting. Reports of high staff turnover were seen to impact children negatively while increasing pressure on colleagues and setting managers. A fifth of survey respondents stated that they were considering leaving the sector in the next 12 months. Almost half of respondents who answered that they were considering leaving the sector stated that pay and remuneration was a key reason.
- 1.7 Most fieldwork participants reported they did not feel their work reflected in their pay nor any additional benefits if applicable. A majority of participants highlighted that insufficient pay was a core reason for staff to leave the sector. Childcare and play workers often reported being paid the minimum wage or slightly above the minimum wage per hour which, they felt, did not reflect their accountability and responsibility for young children, nor the physical and emotional demands of their jobs which included long working hours. Higher hourly salaries paid elsewhere, for example, by supermarket chains or for teaching assistant positions in schools, were felt to be the single largest factor in staff leaving the sector. Pay and remuneration is furthermore seen as a key obstacle to the recruitment of staff, however, 43 per cent of survey respondents also cited high qualification requirements as a barrier.
- 1.8 When asked about qualifications, respondents also highlighted challenges in ensuring that students hoping to join the childcare and play sector had the necessary skills and qualifications to do so, with some courses not covering all mandatory training elements. Barriers for existing staff to obtain further



qualifications include the issue of courses taking place during evenings and weekends when workforce members may have additional caring responsibilities for their families. Participants also emphasised the need for an updated system of funded qualifications and mandatory training as a means to motivate and enable people to join the workforce.

- 1.9 When asked about their use of Welsh during their everyday work, respondents indicated a wide range of levels of familiarity with speaking the Welsh language and their use of Welsh. Nevertheless, setting managers frequently discussed significant difficulties in recruiting and retaining Welsh-speaking staff members. This was linked with being unable to provide sufficient pay to compete for Welsh-speaking staff with other sectors requiring Welsh language skills, such as schools and local authorities. Further, setting managers also stated that there was a lack of incentive in terms of additional pay for existing staff to obtain Welsh language qualifications.
- 1.10 Respondents, especially a majority of playworkers, raised concerns relating to job insecurity and short-term contracts, subject to the nature of their setting's funding. While this was most frequently discussed by playworkers, staff in childcare settings also raised zero-hour contracts as a source of insecurity and anxiety.
- 1.11 Participants in interviews and focus groups across setting types most frequently highlighted the difficulties of running an economically viable setting while paying staff at least minimum wage level or slightly above. Participants also expressed challenges with providing adequate provision for children with Additional Learning Needs (ALN) or other complex support needs. Participants agreed on an "urgent need" to provide more dedicated funding sources for tailored support to this group of children.
- 1.12 Looking to the future, the modelling undertaken to project the workforce implies greater demand for childcare and playwork workers over the next five years, primarily driven by the expansion of Flying Start. This is despite a projected decline in the population for young children over the same time period. Our analysis suggests that this expansion in demand is likely to be concentrated primarily within day care settings. Our analysis also implies that a substantial increase in the amount of Welsh-medium childcare and play provision will be required for local authorities to remain on track with their stated Welsh-medium provision targets (as specified in their Welsh in Education Strategic Plans).

## **2. Introduction**

### **Purpose of this report**

- 2.1 The Welsh Government has the ambition to provide good quality early childhood education and care to all children in Wales. Therefore, it is vital that an accurate picture of the size and make-up of the current childcare and playwork workforce is obtained. Understanding the nature of future demand for childcare and play service provision will be particularly critical to ensuring that the sector can adequately meet its workforce needs. Further, it is important to gain an in-depth awareness of perceptions of the workforce, seeking to establish insights into current successes and challenges, the impact of policy on settings, as well as gathering general views and suggestions for the future to support the sector.
- 2.2 Alma Economics has been commissioned by the Welsh Government to undertake a review of the childcare and playwork workforce in Wales, including modelling the current and future composition of the sector's workforce and engagement with members of the workforce. The work seeks to allow policymakers to (i) better understand the make-up of the current workforce, (ii) strengthen Welsh-medium provision, (iii) address the local needs of providers, and (iv) address concerns about a lack of equal representation in the sector workforce.
- 2.3 This report details the findings of the second phase of this two-phase project. The Phase 1 report summarised findings from the scoping phase and engagement with internal Welsh Government stakeholders, as well as representative bodies and umbrella organisations in the childcare and play sector. Furthermore, it presented a data review and an analysis of the Care Inspectorate Wales (CIW) register and Self-Assessment of Service Statement (SASS) data (among several other sources) to provide the basis for the modelling work conducted in this Phase 2 report.
- 2.4 The Phase 2 report builds on Phase 1 by presenting findings from fieldwork engaging with practitioners and managers in the sector, results from the practitioner survey conducted between August and September 2023, a summary of the qualification data source Lifelong Learning Wales Record (LLWR), and findings from the workforce modelling.

## Structure of this report

2.5 The remainder of this report is structured as follows:

- **Section 3** outlines our research approach, detailing fieldwork participant recruitment, the development of research tools, and the design of the modelling.
- **Section 4** sets out the workforce survey analysis and presents findings based on the sample of respondents.
- **Section 5** summarises respondent characteristics and findings from stakeholder engagement via interviews and focus groups.
- **Section 6** sets out our analysis of the LLWR (Lifelong Learning Wales Record) data and any findings derived from the data source on workforce qualifications.
- **Section 7** presents the results of the workforce modelling work.
- **Section 8** draws conclusions from the Phase 2 research and provides an overview of the overarching findings across all research approaches.
- Research materials can be found in Annexes A, B, C and D, along with a list of assumptions relating to the projections analysis.

### **3. Research approach**

- 3.1 Phase 2 of this research focused on two core components: (i) engagement with practitioners and managers working in the sector via a survey, interviews and focus groups; and (ii) in-depth data analysis and modelling of workforce characteristics. The research was undertaken between May and November 2023 with results being discussed throughout the following sections.

#### **Approach to fieldwork**

- 3.2 Fieldwork with childcare and playwork practitioners and managers sought to provide a range of insights into the sector's workforce, including recruitment and retention, qualifications, Welsh-language provision, strategies to support recruitment of a diverse workforce, as well as following up on relevant considerations raised during the Phase 1 work.
- 3.3 The development of the fieldwork tools was conducted in close collaboration with the Welsh Government, encompassing a survey in both Welsh and English distributed to all registered settings. Furthermore, discussion guides for interviews and focus groups were tailored to setting type and level of responsibility of individual participants.

#### *Participant recruitment*

- 3.4 A survey was developed to gain an improved understanding of demographic characteristics in the workforce, qualifications, Welsh skills, as well as wider opportunities and challenges in the sector. The survey aimed at practitioners and managers in the childcare and play sector was opened for submissions from 7<sup>th</sup> August until 10<sup>th</sup> September. Invitations to respond to the survey were sent twice to all settings via a publicly available list of registered settings.<sup>1</sup> Furthermore, three invitations to participate were sent via a regular CIW newsletter to settings. The emails and newsletter invitations explicitly asked setting managers to distribute the survey to their staff members, given individual contact details of workforce members were not available.
- 3.5 Once respondents had filled out the survey, they were invited to provide their contact details in a separate form to express interest in whether they would like to participate in a focus group or interview. If interest was expressed, respondents

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<sup>1</sup> Care Inspectorate Wales, 2023. See: [Care service directory \(Care Inspectorate Wales\)](#)

were asked to indicate their professional role, setting type, local authority, preferred language (Welsh or English), as well as their contact details. Subsequently, respondents were invited to the type of follow-up engagement they had requested.

- 3.6 To increase the number of participants in interviews and focus groups, a second round of recruitment took place in September 2023, with invitations distributed via the stakeholder organisations Clybiau Plant Cymru Kids' Clubs and Mudiad Meithrin in the childcare and play sector.

#### *Analysis of responses*

- 3.7 Data obtained through the practitioner and manager survey was broken down into descriptive summary statistics for central indicators per topic and question. Open-text responses to the survey were read manually and also assessed via thematic analysis.

- 3.8 Data from the stakeholder engagement via interviews and focus groups was analysed through thematic analysis. This approach allows the detection of common themes and overarching trends across participants, while considering the segmentation between different setting types.

#### **Approach to the modelling**

- 3.9 A model was developed to project the future demand for childcare and play places, and the resulting demand for the childcare and playwork workers likely to be needed to sustain any necessary changes to provision.
- 3.10 The model estimates current and future demand for childcare and play places and workers in Wales, projecting for the five-year period 2023/24 to 2027/28.
- 3.11 Where possible, the model uses publicly available information sources including, but not limited to, SASS 2023 results, announced policy commitments for the sector, and data provided by the Welsh Government. The assumptions used and the underlying data sources are summarised in Annex D of this report.
- 3.12 The model considers potential future changes to policy commitments or targets and demographic changes. Key scenarios that have been modelled include:
- **Policy scenarios and targets.** The model considers different policy scenarios to project the impact on childcare and play places and workforce demand of current or potential future policy commitments or goals. Policy scenarios include:

- **Flying Start expansion.** The model considers the additional demand for places and workers required to facilitate the expansion of Flying Start childcare. Commencing in September 2022, Phase 1 of the expansion of Flying Start targeted providing 2,500 children aged between 0-4 years with access to Flying Start services (this target has now been exceeded). This includes childcare for children aged 2-3 years, with those eligible receiving 12.5 hours of childcare per week for 39 weeks of the year.<sup>2</sup> Phase 2 of the expansion of Flying Start will provide childcare to more than 3,000 children aged between 2-3 years during 2023/24 and 2024/25.<sup>3</sup>
- **Welsh-medium provision targets.** Changes to Welsh-medium childcare and play provision targets are also considered in future workforce requirements. As part of Cymraeg 2050, the Welsh Government plans to expand Welsh-medium early years provision by 150 Welsh-medium nursery groups within ten years of publication (with nursery care providers falling within the CIW's definition of registered childcare and play settings), with each local authority setting their own targets for Welsh-medium childcare provision.<sup>4</sup>
- **Illustrative future policy scenarios.** The model includes flexibility to adjust key policy parameters to explore the impact of additional policy changes, including implications for childcare and play demand (in terms of the number of places and hours of provision) on the workforce.
- **Demographic change.** We have used established population projections, those developed by ONS for young age groups in Wales, to estimate how the childcare and playwork workforce would need to evolve to meet potential demand for services due to demographic changes.<sup>5</sup>

3.13 To support planning and provide additional insight into the demand for places and the workforce, the model provides breakdowns of service and staffing demand by:

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<sup>2</sup> Phased expansion of Early Years Provision, guidance. See: [Phased expansion of Early Years Provision \(Welsh Government\)](#)

<sup>3</sup> Welsh Government press release. See: [Children in Wales to benefit from £100m investment in childcare \(Welsh Government News\)](#)

<sup>4</sup> Cymraeg 2050: A million Welsh speakers (2017). See: [Cymraeg 2050: Welsh language strategy \(Welsh Government\)](#)

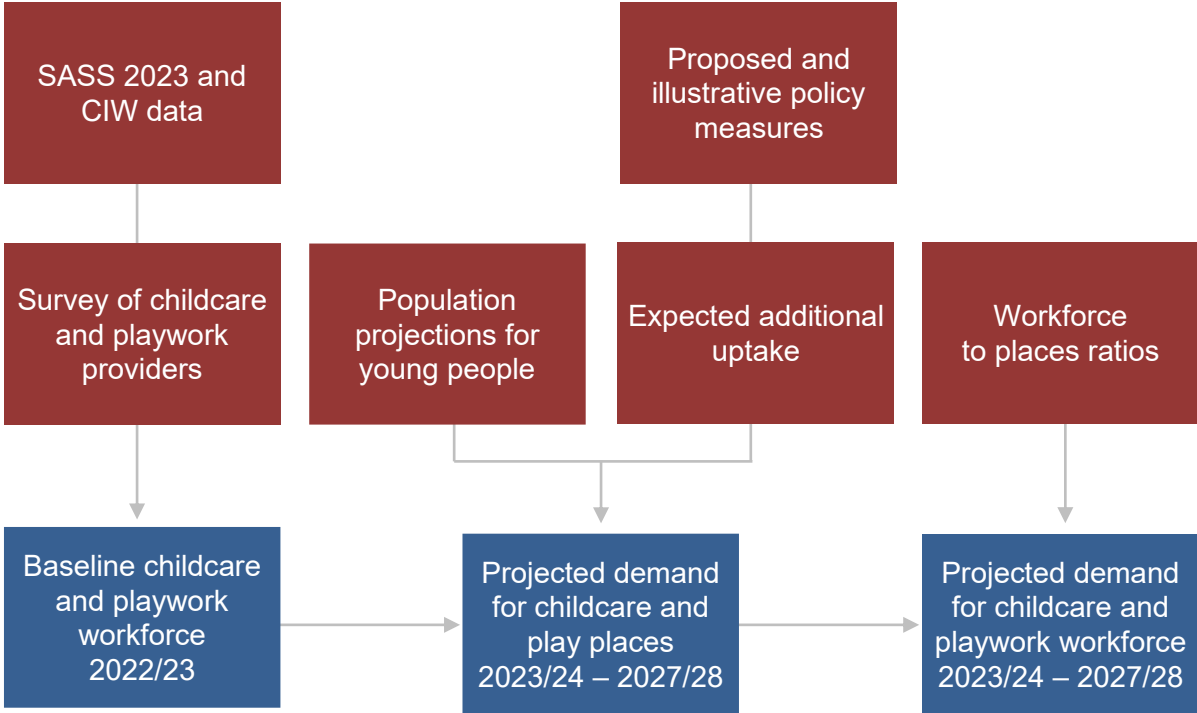
<sup>5</sup> Our assumptions are based on the 2020-based interim national population projections for Wales, published by ONS: [Population Projections 2020-based \(Welsh Government\)](#)

- The **type of setting** through which the service is provided.
- The **Welsh language skills** of the staff that are providing the service.
- The **language** through which the service is being provided.
- The **local authority** area in which the service is being provided.
- The **qualification level of staff** who are providing the service.

3.14 The projections for childcare and play service and worker demand were developed through the following steps (also summarised in the diagram below):

- **Step 1:** Estimate current demand for childcare and play places and workers using available data. The primary data source used to estimate current demand for places and workers was the SASS 2023 dataset.
- **Step 2:** Project the change in demand for childcare and play services based on the projected population growth for young people (using population projections for all age groups developed by ONS).
- **Step 3:** Model the impact of potential changes to current and future policy commitments, making assumptions about the likely eligible population and level of take-up should any key policy parameters change.
- **Step 4:** Translate any projected changes in service demand to a change in workforce demand, making assumptions on the ratio of workers to places.
- **Step 5:** The final projections were then mapped to key categories of interest (outlined in paragraph 3.13), primarily based on historical breakdowns of childcare and play service demand.

**Figure A: Childcare and play workforce demand model schematic**



Key:

- Data
- Outputs



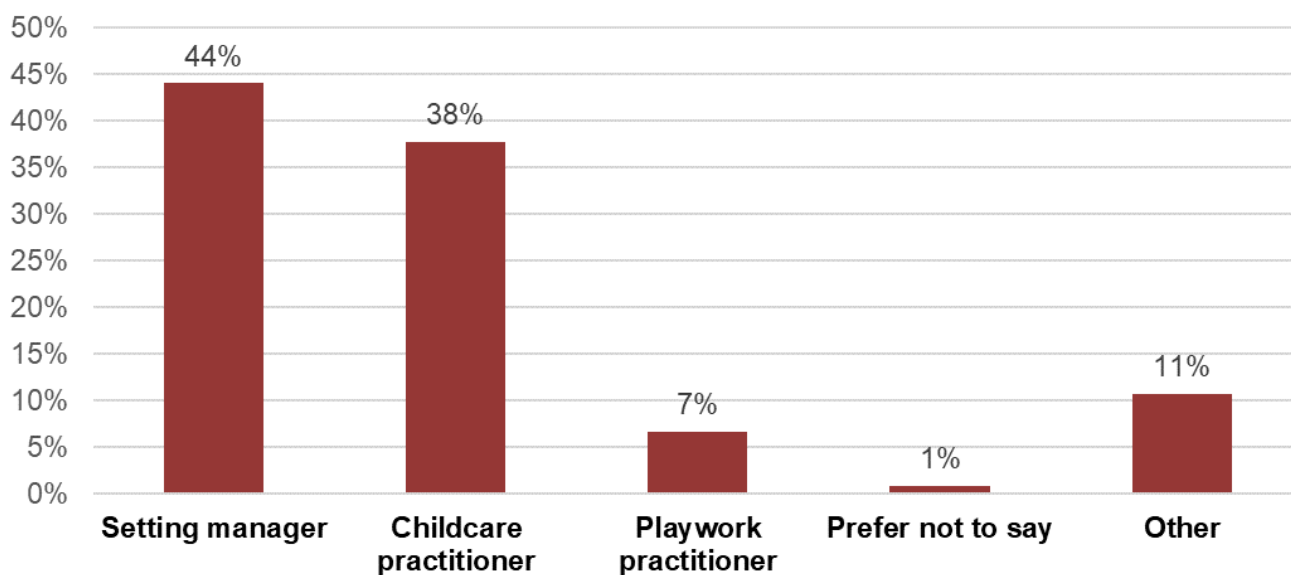
## 4. Analysis of survey data

4.1 This section details the insights gained from the survey distributed to childcare and play settings between August and September 2023. The survey received a total of 624 responses, 30 of which were submitted in Welsh. Topics covered by the survey questions included respondents' working patterns and setting details, demographic questions, respondents' qualifications, personal work satisfaction, and respondents' outlook for the future. Respondents answering in their position as setting managers were asked to provide anonymous information on the characteristics of workforce members in their settings as well as to discuss their experiences with wider structures and challenges in the sector.

### Analysis of working patterns

4.2 Among 617 respondents to the first question, 44 per cent reported working as a setting manager, 38 per cent answered as a childcare practitioner (as per the survey's instructions, this also includes childminders without staff), seven per cent as playwork practitioners, and 11 per cent as "Other". Among those responding "Other", roles most often mentioned were childminders, deputy managers, play officers, school staff, and trustees.<sup>6</sup>

**Figure 1: Responses to survey by respondent type**

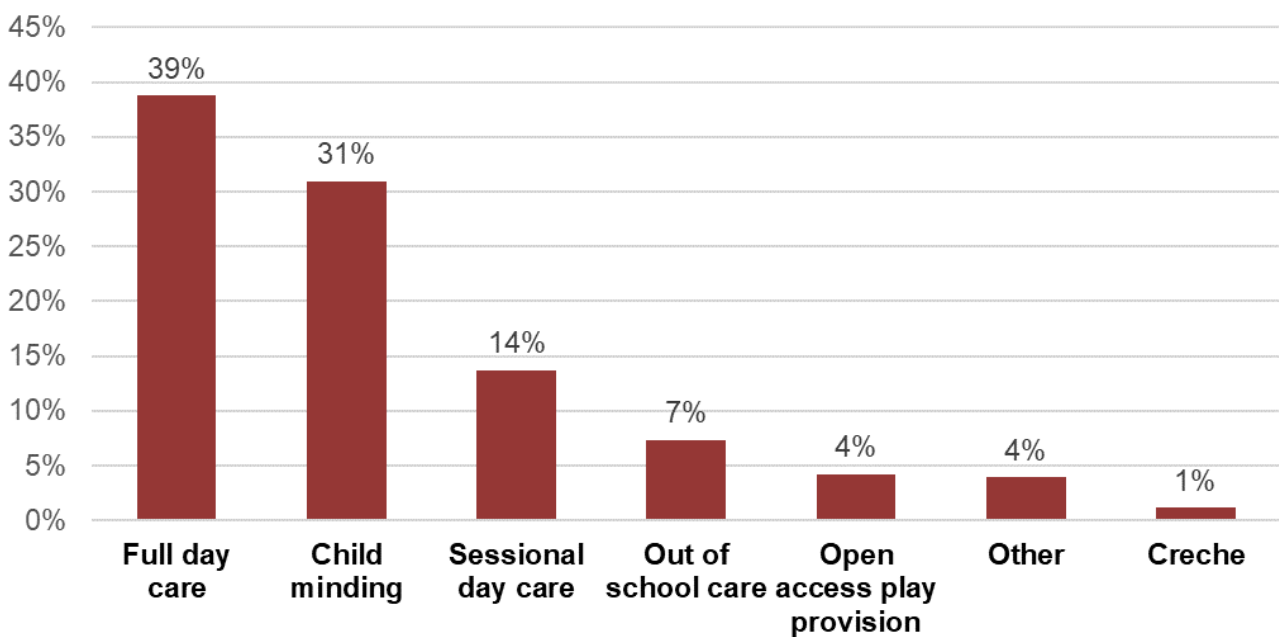


N=617 respondents

<sup>6</sup> It should be noted that the survey was distributed via official mailing lists from CIW to setting managers who were then asked to distribute the survey further to their staff members. The share of setting managers as part of total respondents is therefore likely to be higher, given they received invitations to complete the survey directly. No such directory of contact details for practitioners exists.

4.3 Among respondents, 39 per cent reported working in a full day care setting, 31 per cent as childminders, and 14 per cent in sessional day care settings. Furthermore, seven per cent responded as professionals working in out of school care, four per cent in open access play provision, and one per cent in creches. Among the four per cent answering “Other”, respondents reported working in children’s charities, Cylch Meithrin settings, as freelance workers, in playgroups, as well as combinations of the above categories.

**Figure 2: Responses to survey by setting type**



N=614 respondents

4.4 When asked what category of provider respondents worked for, 68 per cent answered they worked for a private sector provider, 17 per cent for a local authority provider, and ten per cent for a third sector provider. Five per cent responded “Other”, mentioning charities, Mudiad Meithrin settings, or being self-employed.

4.5 Across setting types, respondents reported working with a range of children across age groups, most frequently three- to four-year-olds (25 per cent), two-year-olds (24 per cent), five- to twelve-year-olds (17 per cent), one-year-olds (16 per cent), as well as children below the age of one (15 per cent) and “Other”. Those reporting that they worked with other age groups frequently provided more specific age groups, e.g., three- to eleven-year-olds or four- to twelve-year-olds.

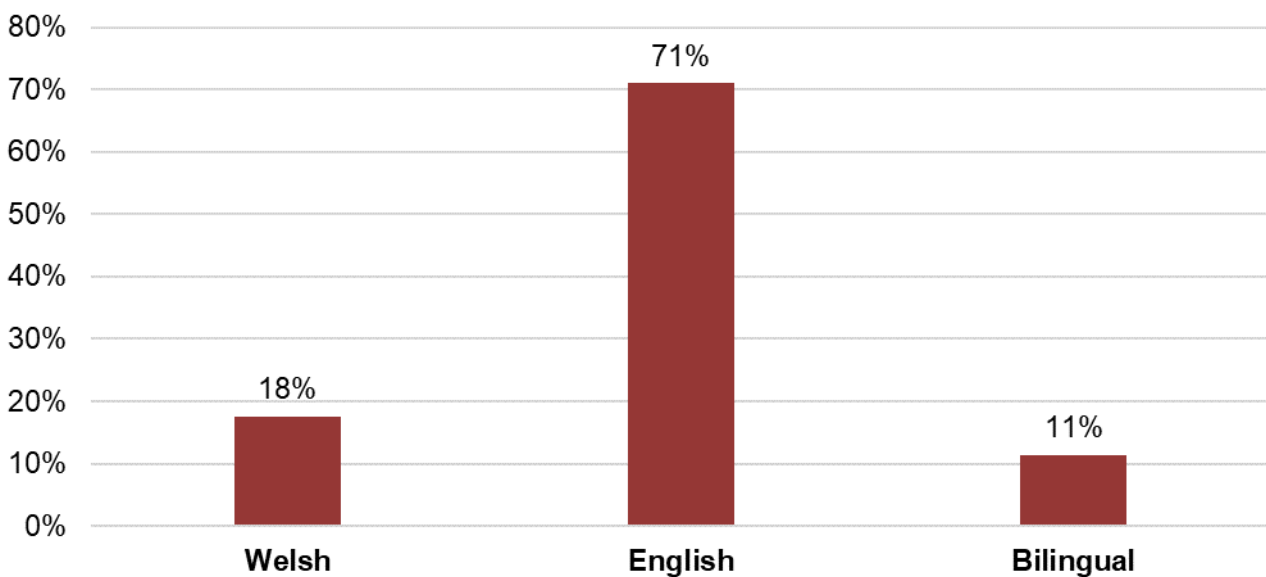
4.6 Respondents from all 22 local authorities in Wales answered the survey, ranging from less than ten responses in three local authorities (Anglesey, Blaenau Gwent,

Bridgend) to more than 40 responses in five local authorities (Cardiff, Carmarthenshire, Gwynedd, Rhondda Cynon Taf, Vale of Glamorgan).

4.7 Three in four respondents (76 per cent) did not hold any additional employment positions aside from their primary work. In contrast, 11 per cent held a secondary position in the childcare and play sector while a further 11 per cent held positions in a different sector. The remaining two per cent of respondents preferred not to answer the question. When asked about the type of work that relevant respondents' secondary position consisted of, 45 per cent responded that they also worked in playwork settings or out of school clubs. Respondents furthermore held secondary positions in childcare (21 per cent), youth work (ten per cent), and childminding (seven per cent). Among the 17 per cent responding "Other", examples included schools and teaching assistants.

4.8 When asked about what the main language was in which respondents' settings provided their services, 71 per cent responded this was in English, 18 per cent in Welsh, and 11 per cent worked in a bilingual setting.

**Figure 3: Language used in settings**



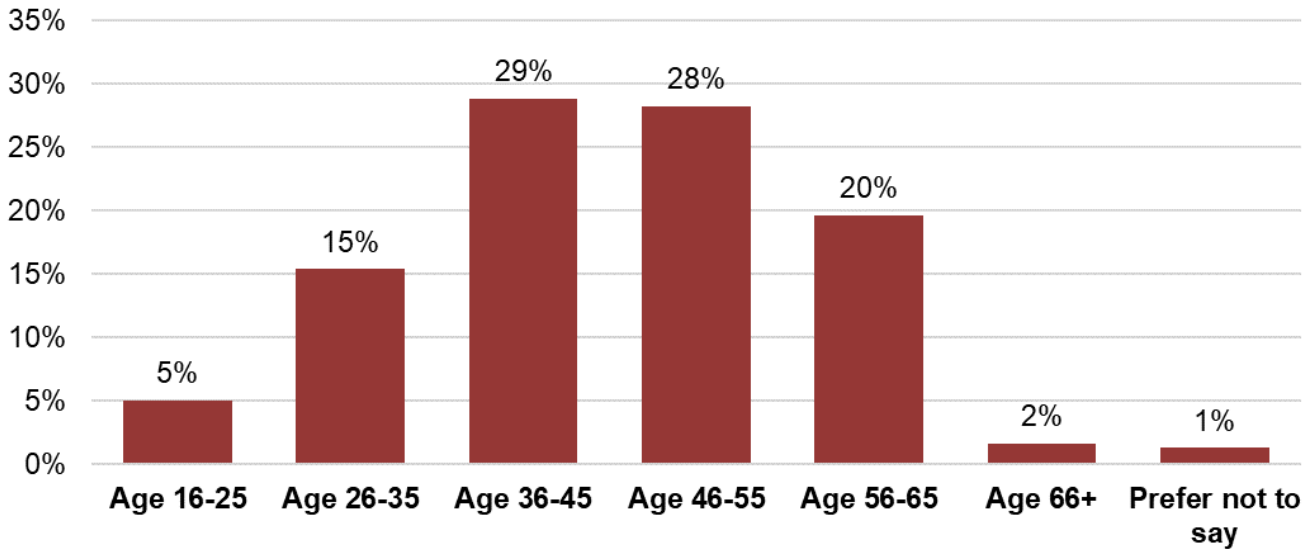
N=614 respondents

### **Analysis of respondent demographics**

4.9 The survey asked a range of demographic questions which respondents could choose to answer. Asked about their age group, 29 per cent responded they were between 36-45 years old, 28 per cent responded they were between 46-55 years old, and a further 20 per cent were between 56-65 years old. Additionally, 15 per

cent reported being between 26-35 years old, five per cent were between 16-25 years old, two per cent were above 66 years of age, and one per cent preferred not to answer the question.

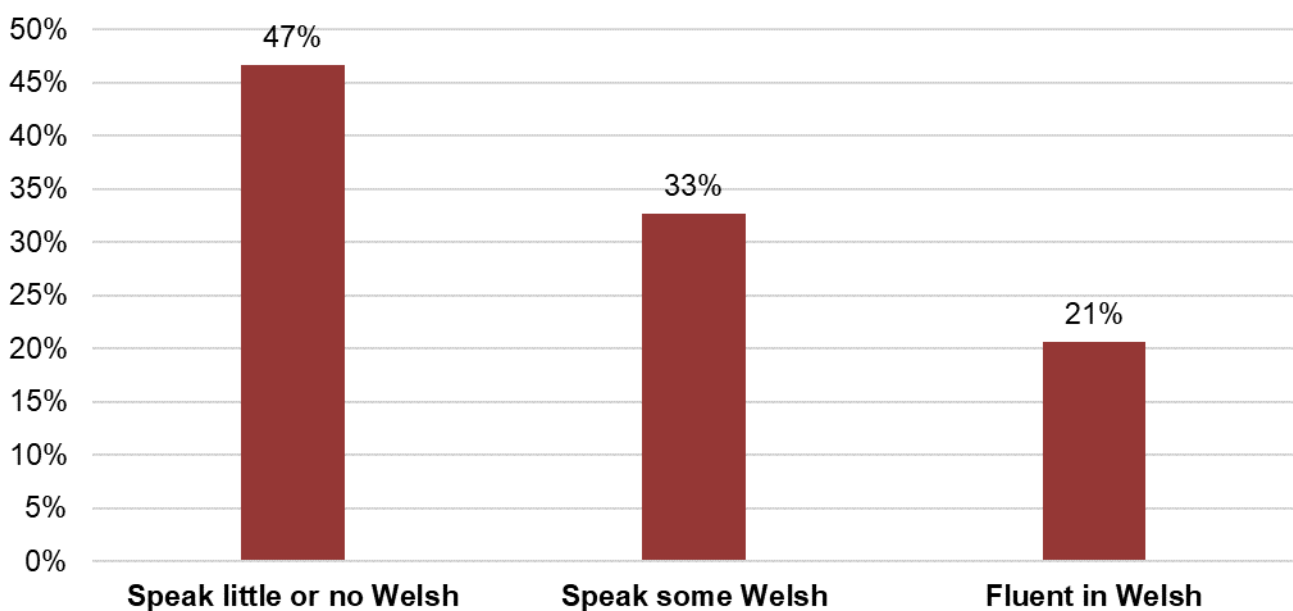
**Figure 4: Age of respondents**



N=617 respondents

4.10 Moreover, the survey asked about practitioners' and setting managers' Welsh language skills. Among the 615 respondents answering the question, 47 per cent reported speaking little or no Welsh, 33 per cent said they spoke some Welsh and 21 per cent were fluent in Welsh.

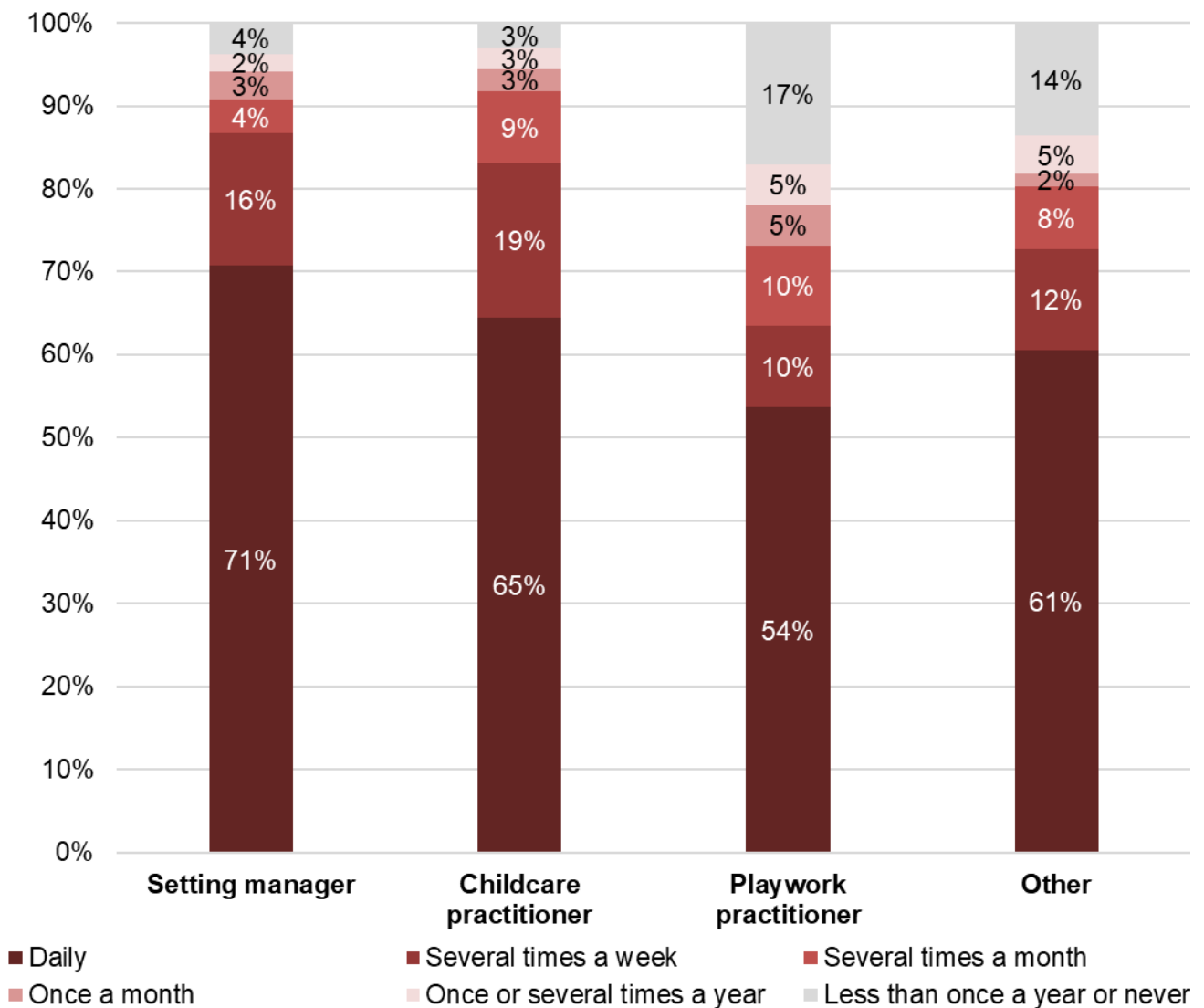
**Figure 5: Welsh-language skills of respondents**



N=615 respondents

When asked about how often practitioners used their Welsh skills at work, 66 per cent reported using Welsh daily, 16 per cent used it several times a week, seven per cent reported using Welsh several times a month, while five per cent reported using Welsh less than once a year, three per cent once or several times a year, and three per cent once a month. Further insights can be gained by disaggregating respondents' answers to how often they use their Welsh skills by respondent type (setting manager, playworker, childcare practitioner, and other respondents). Notably, 71 per cent of setting managers reported using their Welsh on a daily basis, compared to 65 per cent of childcare practitioners and 54 per cent of playworkers speaking Welsh daily. Among those using their Welsh once a month or less, this included nine per cent of all responding setting managers, nine per cent of childcare practitioners, and 27 per cent of playworkers.

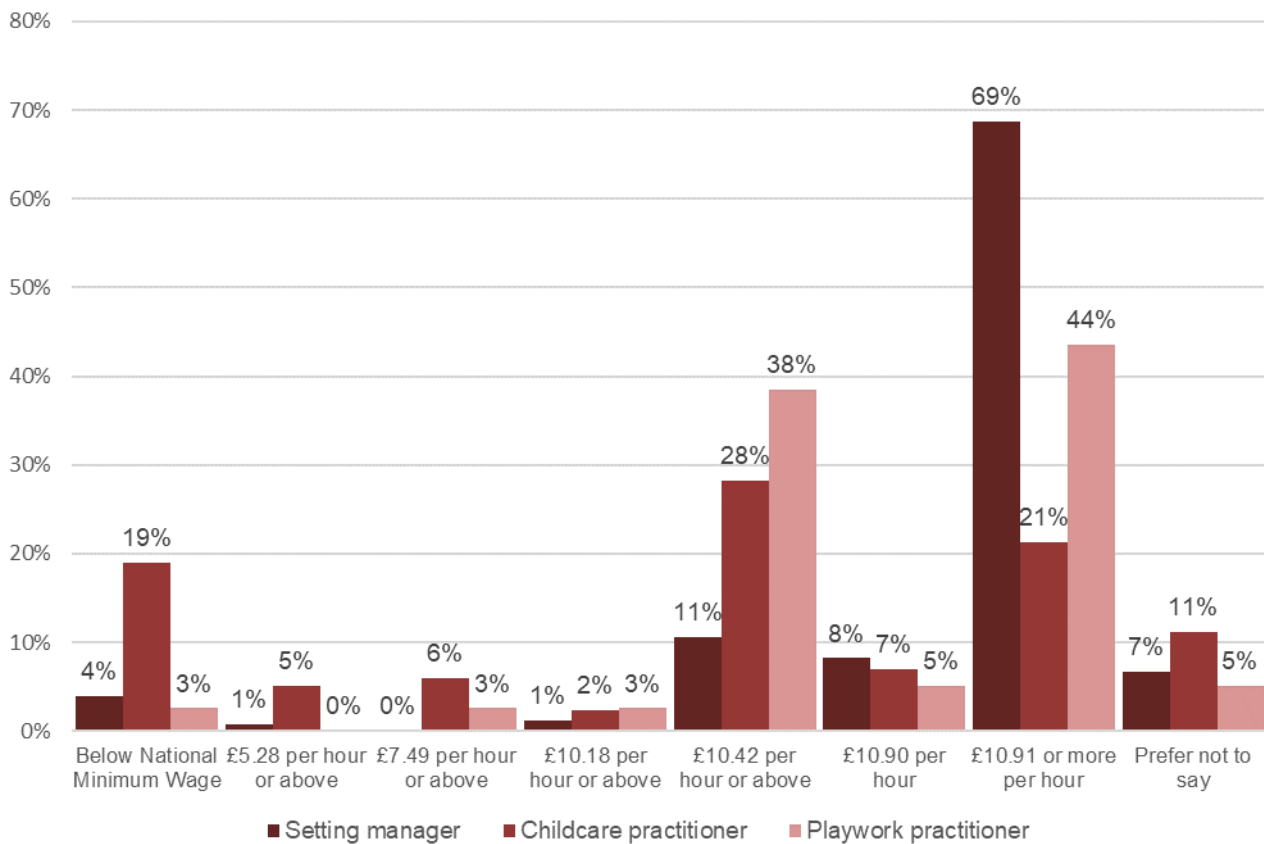
**Figure 6: Frequency of using Welsh by respondent type**



N=613 respondents

4.11 The survey additionally asked respondents to self-report their respective pay bands. Among 602 respondents to the question, 44 per cent reported earning £10.91 or more per hour, equivalent to a salary above the Real Living Wage. Another 19 per cent said they were paid £10.42 per hour or above, equivalent to the National Living Wage for age 23 and above, and ten per cent reported being paid less than the National Minimum Wage or National Living Wage for their respective age. While 19 per cent of childcare practitioners reported being paid less than the National Minimum Wage or National Living Wage for their age, this applied to only four per cent of setting managers and three per cent of responding playworkers. A further 38 per cent of playworkers responding to the survey were paid £10.42 per hour or slightly above the National Minimum wage for ages 21 and 22, with 28 per cent of childcare practitioners and 11 per cent of setting managers also getting paid this amount. Additionally, 69 per cent of setting managers said they were paid £10.91 or more per hour which furthermore applies to 44 per cent of playworkers and 21 per cent of childcare practitioners, equivalent to pay above the Real Living Wage.

**Figure 7: Pay per hour by respondent type**



N=602 respondents

- 4.12 When asked about their sex, 96 per cent of respondents answered “female” while three per cent reported “male”. Furthermore, 99 per cent specified that the gender they identified with was the same as their sex registered at birth.
- 4.13 Among 615 responses to the question “What is your ethnic group?”, 98 per cent answered ‘White’. Two per cent of individuals replied they were either of “Mixed or multiple ethnic groups” background, of “Asian, Asian Welsh, or Asian British” background, of “Black, Black Welsh, Black British, Caribbean or African”, background, or from “Other ethnic groups”.<sup>7</sup>
- 4.14 When asked whether they had any physical or mental health conditions or illnesses lasting or expected to last 12 months or more, 80 per cent responded that this was not the case, 16 per cent answered “Yes”, and three per cent preferred not to answer. Among respondents answering “Yes” and who were willing to specify further, 45 per cent answered that their condition or illness reduced their ability to carry out day-to-day activities, 35 per cent said this was not the case at all, 11 per cent preferred not to say, and eight per cent answered this impacted them a lot.

### Qualifications

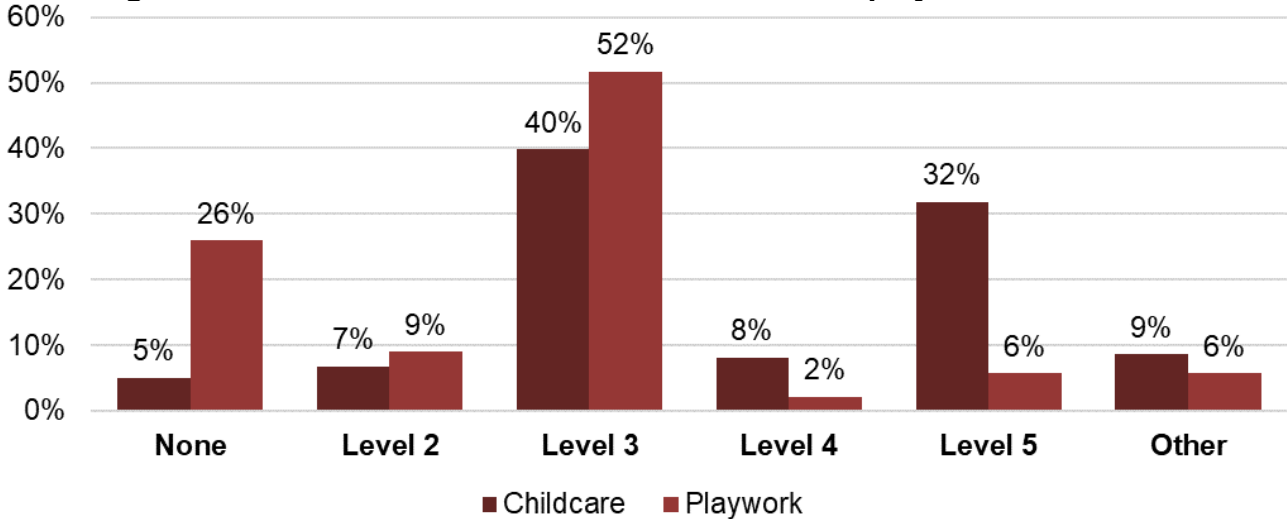
- 4.15 All respondents were asked about the highest qualification they currently held. Respondents most frequently held a Level 3 qualification in either childcare or playwork (40 per cent and 52 per cent of those who held any childcare or playwork qualification respectively), followed by a Level 5 in childcare (32 per cent of respondents with any childcare qualification). Another 26 per cent of respondents reported having no playwork qualification and five per cent had no childcare qualification.

**Table 1: Highest qualification levels held by respondent type**

	Childcare	Playwork	Childcare	Playwork
None	29	87	5%	26%
Level 2	39	30	7%	9%
Level 3	232	173	40%	52%
Level 4	47	7	8%	2%
Level 5	185	19	32%	6%
Other	50	19	9%	6%
<b>Total</b>	<b>582</b>	<b>335</b>	<b>100%</b>	<b>100%</b>

<sup>7</sup> Precise figures are not disclosed in detail to avoid risks of identifying individuals.

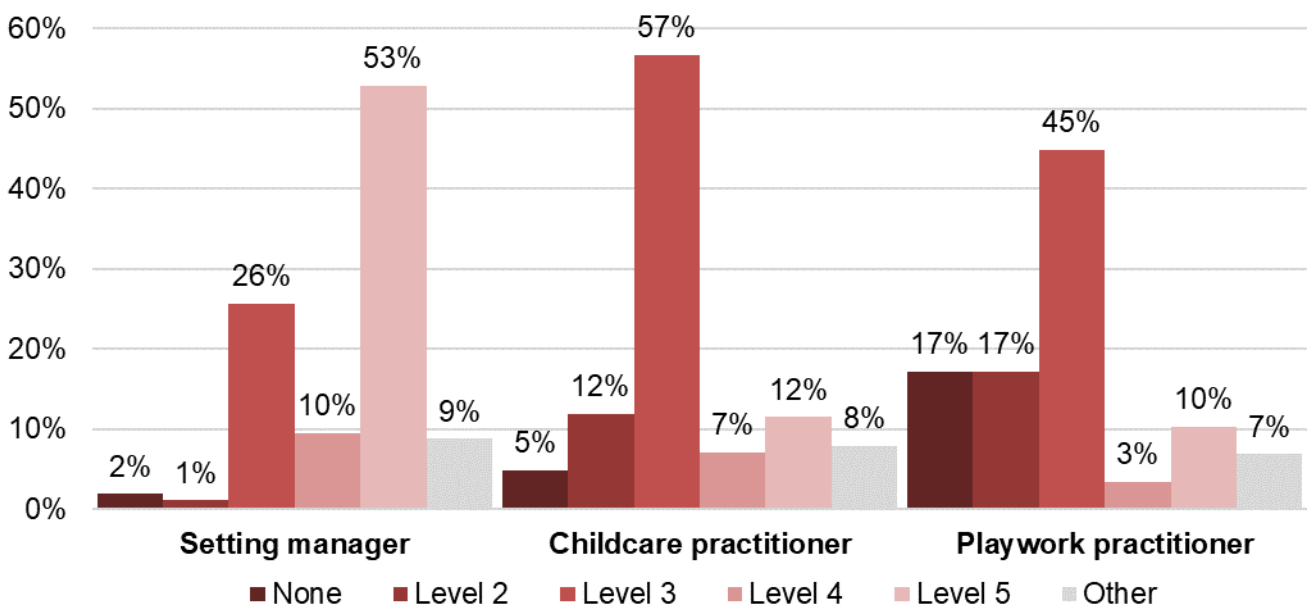
**Figure 8: Qualification levels held in childcare and playwork**



N=602 respondents providing information either on childcare or playwork qualifications, or both.

4.16 Given different requirements per setting type, a further segmentation by respondent type is insightful. When disaggregating results by the type of professional role of respondents, the survey data shows that 53 per cent of setting managers hold a Level 5 childcare qualification, 26 per cent of setting managers hold a Level 3 childcare qualification while 62 per cent of setting managers with any playwork qualification hold a Level 3. Among childcare practitioners holding a childcare qualification, 57 per cent hold a Level 3 qualification and 12 per cent hold a Level 5. Among playworkers with playwork qualifications, respondents most frequently hold a Level 3 (47 per cent) as well as a Level 2 (25 per cent).

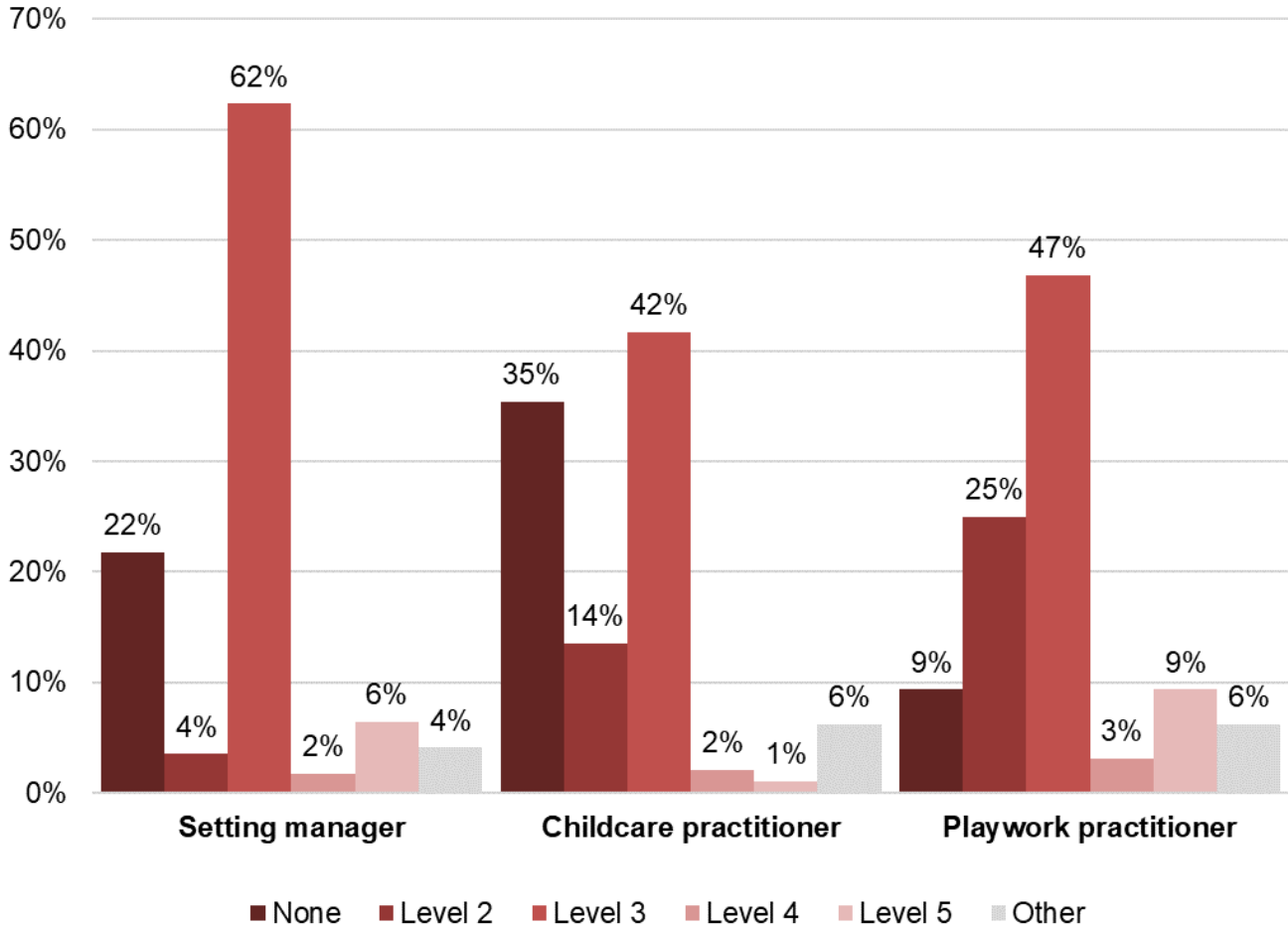
**Figure 9: Childcare qualifications held by respondent type**



N=582 respondents indicating whether they held a childcare qualification.



**Figure 10: Playwork qualification held by respondent type**



N=335 respondents indicating whether they held a playwork qualification.

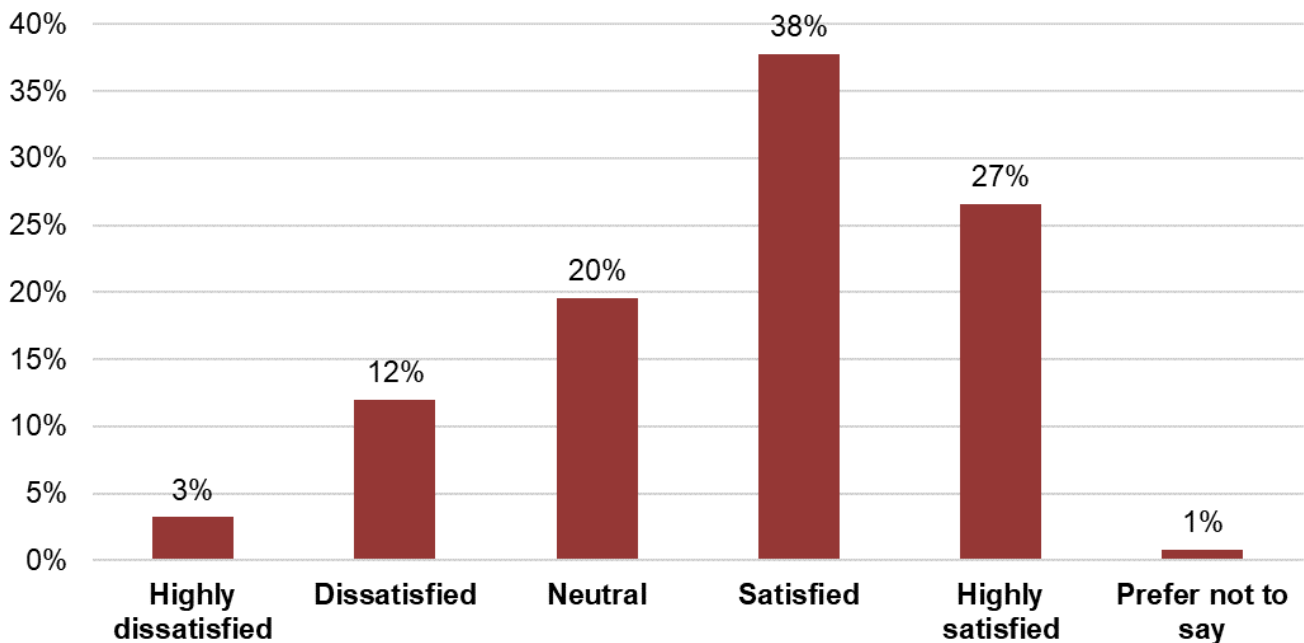
4.17 When asked whether they were currently studying for any additional qualifications in childcare or playwork or intending on studying for one in the next 12 months, 62 per cent of respondents answered this was not the case. A further 18 per cent reported feeling undecided, 11 per cent were currently undertaking or planning to undertake a childcare qualification, six per cent were actively undertaking a playwork qualification, and three per cent undertook another type of qualification. Examples of other qualifications mentioned included childminding, leadership and management, and forest school. Among those currently studying for a qualification, 44 per cent were studying for a Level 3, 21 per cent for a Level 5, and 20 per cent for a Level 4, while nine per cent were studying for a Level 2 and six per cent for another unspecified level.

**Personal work satisfaction and outlook**

4.18 When asked about how content they were with their current work in the sector, 38 per cent responded they were currently satisfied, 27 per cent were highly satisfied,

20 per cent felt neutral, while 12 per cent reported feeling dissatisfied and three per cent were highly dissatisfied.

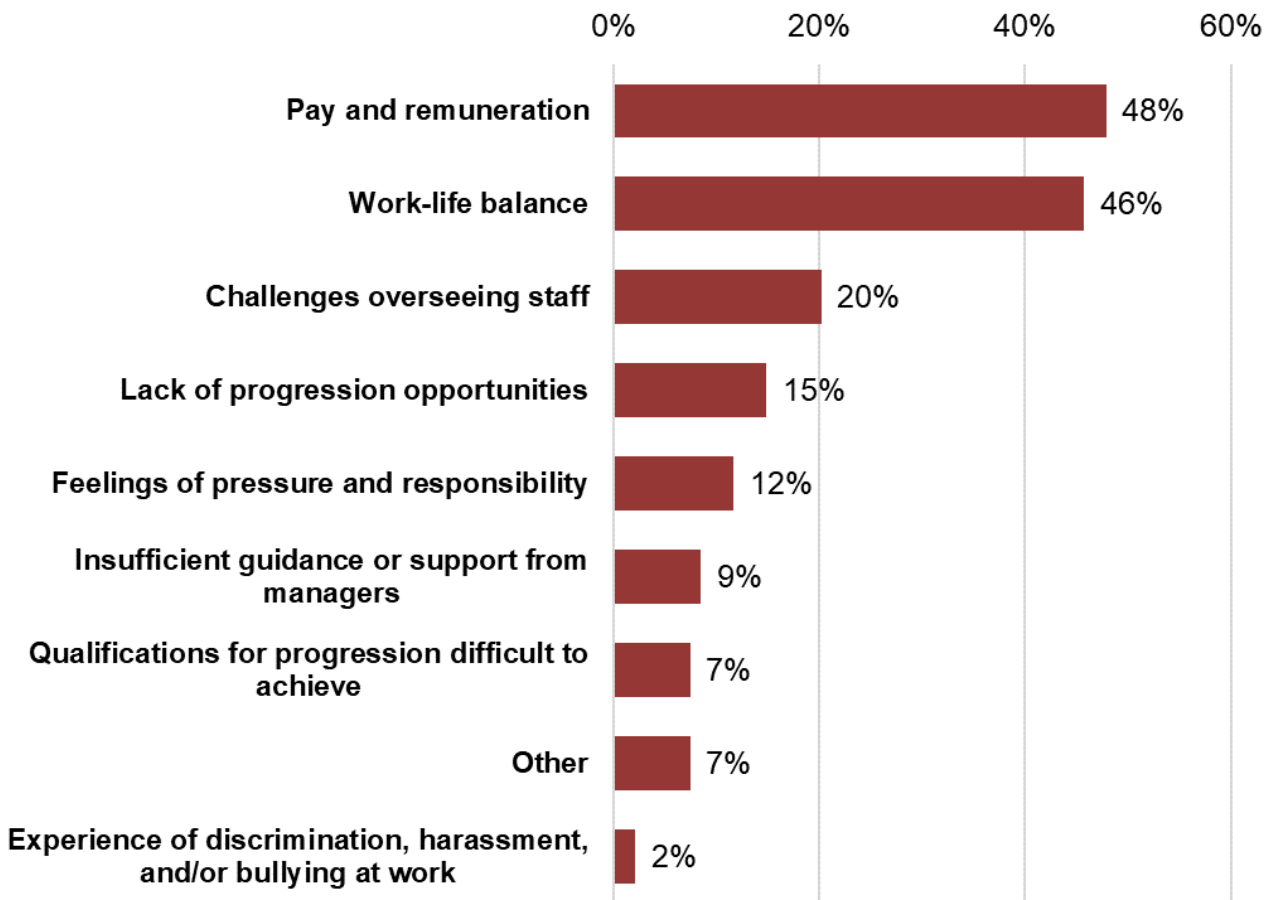
**Figure 11: Personal satisfaction of respondents**



N=617 respondents

4.19 Those respondents previously indicating they were dissatisfied or highly dissatisfied were subsequently asked about their reasons for dissatisfaction (respondents could select all applicable reasons). Among respondents, 48 per cent responded that their dissatisfaction was due to pay and remuneration, 46 per cent cited work-life balance, and 20 per cent mentioned challenges overseeing staff. A further 15 per cent reported their dissatisfaction to be caused by a lack of progression opportunities, 12 per cent reported feelings of pressure and responsibility, nine per cent cited insufficient guidance or support from managers and seven per cent highlighted qualifications for progression being difficult to achieve.

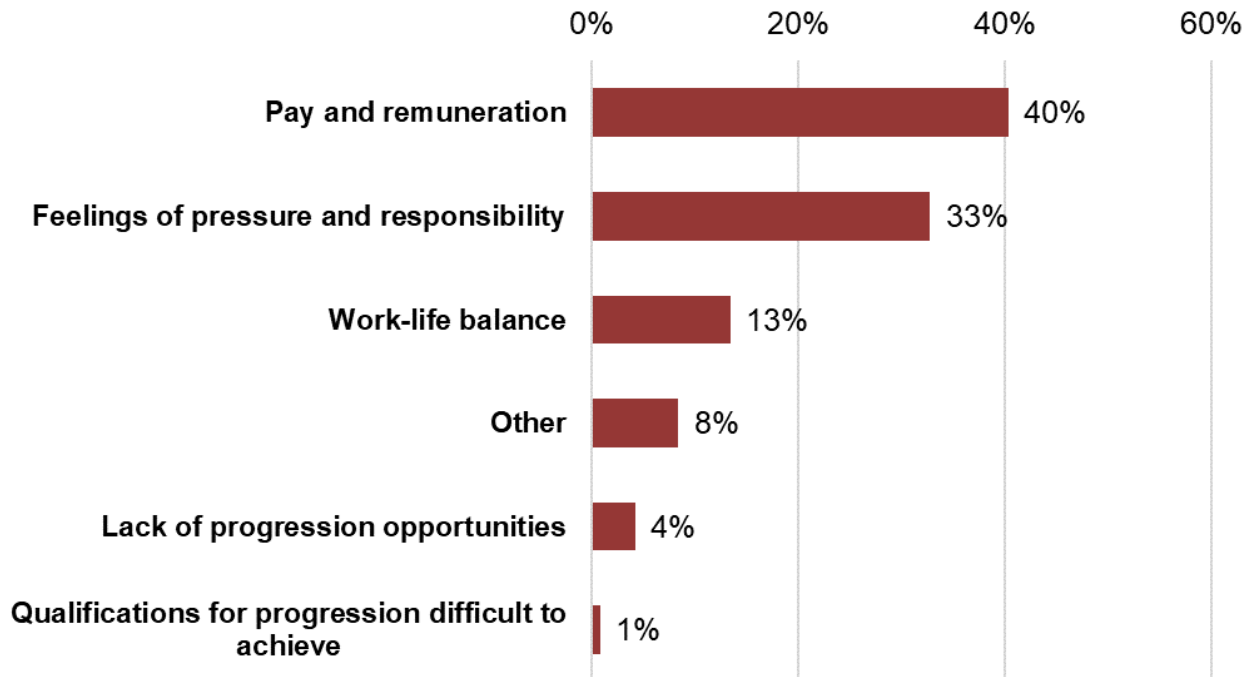
**Figure 12: Reasons for dissatisfaction [among respondents previously indicating dissatisfaction]**



N=94 respondents – note that this follow-up question was only asked to respondents previously answering “Dissatisfied” or “Highly dissatisfied”.

4.20 Following questions on satisfaction and dissatisfaction, respondents were asked whether they were considering any of several options. Among respondents, 62 per cent responded they were considering no proposed option, 20 per cent were considering leaving the sector, and six per cent were considering taking up a second job. Among the 20 per cent answering they were considering leaving the sector, 40 per cent cited pay and remuneration as their main reason, in addition to 33 per cent citing feelings of pressure and responsibility. Another 13 per cent mentioned work-life balance concerns as their reason for wanting to leave the sector.

**Figure 13: Reasons for leaving the childcare and play sector**



N=119 respondents – note that this follow-up question was only asked to respondents previously answering that they were considering leaving the sector in the next 12 months.

4.21 Following the multiple-choice question for why responding workforce members were dissatisfied, the survey asked all respondents whether they expected any challenges from current or future childcare and play policy to affect their settings. Responding workforce members provided written responses mentioning a variety of reasons for dissatisfaction, ordered by frequency in the following paragraphs.

4.22 The most frequently mentioned concerns surrounded the expansion of Flying Start. Setting managers responded that they were struggling to attract sufficient staff to deliver the expansion and cater to additional children entering their setting. Some respondents furthermore voiced their opinion that Flying Start should be extended to all childminders uniformly across all local authorities. It was also highlighted that the administrative system of Flying Start should be aligned with the Childcare Offer and ideally use the same system which was praised for the Childcare Offer. Meanwhile, substantial challenges were cited for the current Flying Start modalities. Providing written responses to the survey, a number of setting managers furthermore expressed concerns over the suitability of the low number of hours provided through Flying Start and the Flying Start expansion (especially for working parents) and encouraged the adoption of a model as seen to be currently in place in England, offering 30 hours of funded childcare to two-year-olds.

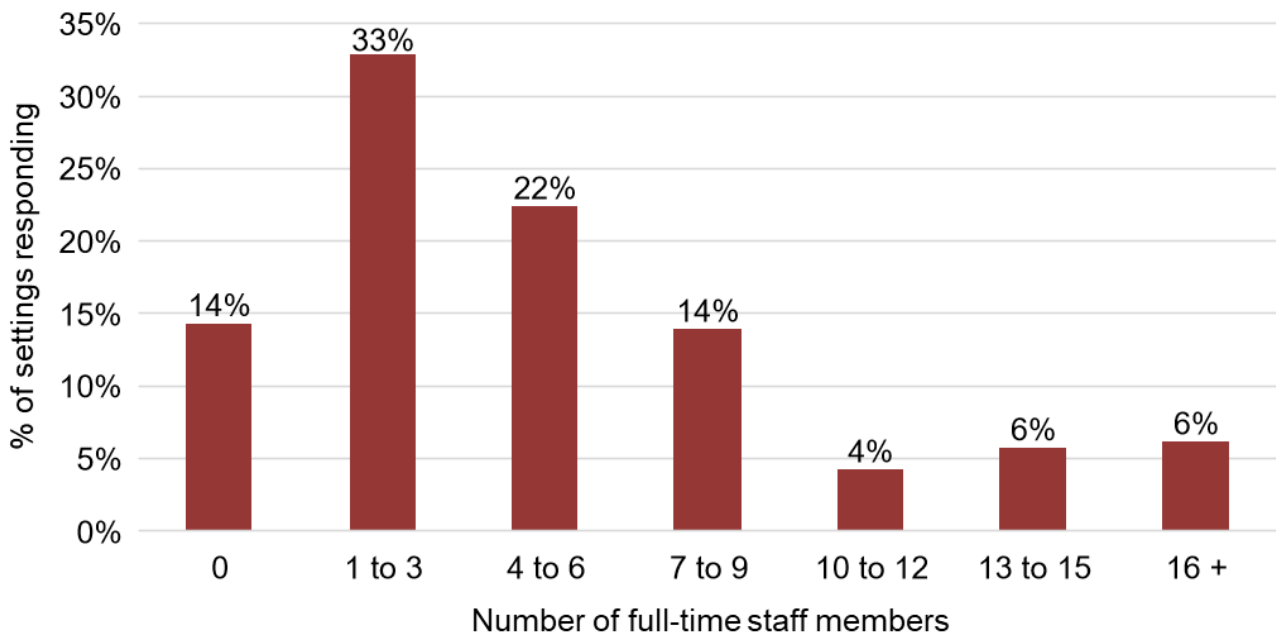
- 4.23 The second most common theme raised by respondents was that current funding per place for the Childcare Offer and Flying Start was insufficient to cover their settings' costs, often operating at a loss trying to cover costs instead through higher rates received from privately paying parents. Setting managers proposed that they should be able to charge privately payable top-up fees for funded places to make their business sustainable and cover costs ("Cost of flying start and childcare offer does not match the outgoings within the childcare setting. For example the cost of a member of staff, holiday pay, sickness cover, food, rent, materials, courses etc." – Setting manager).
- 4.24 The third most frequently highlighted theme was National Minimum Standards and specifically ratios set by CIW. Setting managers explained that with current ratios, their settings were not economically viable, given the funding per hour per place and the associated staff and overhead costs. Survey respondents furthermore reported that they were often unable to attract sufficient numbers of qualified staff to satisfy ratio requirements, given the number of children due to attend the setting. Instead, setting managers reported having to invest significant resources into training their staff and themselves while struggling to motivate staff, given little financial reward for improved qualifications. A further challenge highlighted was the perceived burdens of paperwork and the necessity of a different approach to inspections, focusing on support for settings and recognising strengths. Other challenges mentioned by managers were concerns over competition with schools that were seen as being able to operate with fewer restrictions, such as staffing ratios and qualifications, as well as worries around qualifications, safeguarding, and requirements for additional playwork qualifications.

### **Workforce characteristics in settings**

- 4.25 Setting managers were asked how many full- and part-time staff they employed at their setting (restricted only to staff directly interacting with children as part of their role). A majority of settings reported full-time staff numbers between zero to fifteen, with only 14 per cent of settings having no full-time staff (15 per cent without any part-time staff), ten per cent with one full-time staff member (12 per cent with one part-time staff member), ten per cent with two full-time staff members (14 per cent with two part-time staff members), and 13 per cent with three full-time staff members (seven per cent with three part-time staff members). Additionally, 22 per cent reported having between four to six full-time staff members (27 per cent with

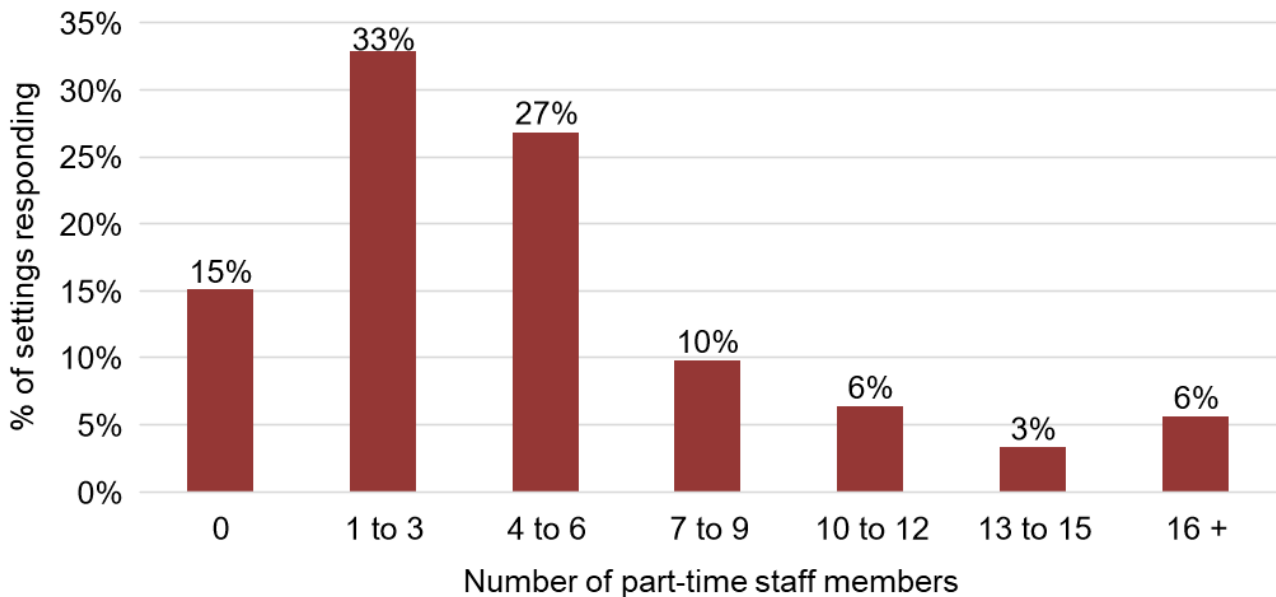
four part-time staff members) and 14 per cent with between seven to nine full-time staff members (ten per cent with five part-time staff members).

**Figure 14: Full-time staff members within settings**



N=258 setting managers reporting on behalf of their settings.

**Figure 15: Part-time staff within settings**

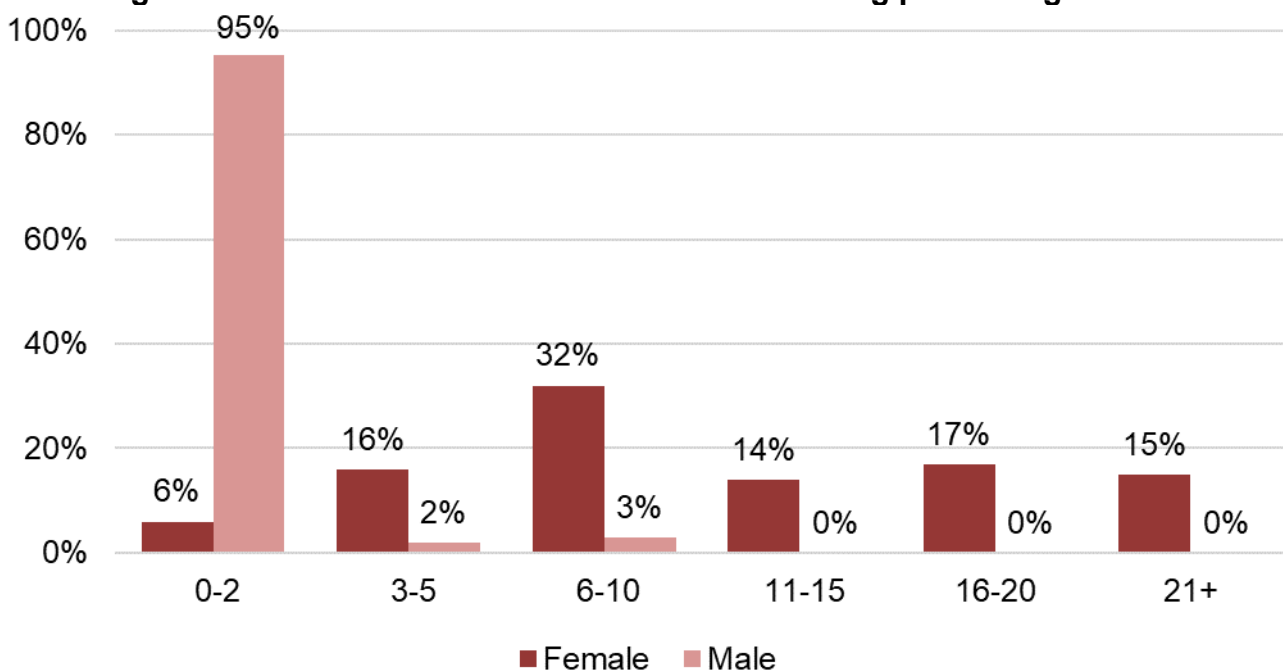


N=264 setting managers reporting on behalf of their settings.

4.26 When asked whether settings undertook any equal opportunities monitoring, 40 per cent answered “Yes” while 42 per cent said this was not the case. A further 18 per cent responded that they preferred not to say.

4.27 Setting managers were also asked to report the number of female and male staff, according to their equal opportunities monitoring data. A total of 71 per cent of settings responding to the question reported having no male staff members, while 21 per cent had one male member of staff. A further nine per cent employed between two to six male members of staff. In contrast, only one per cent of responding setting managers had no female staff members, 21 per cent had between one to five female staff members, 32 per cent of responding settings had between six to ten female staff members, and a further 31 per cent had between eleven to twenty female staff members.

**Figure 16: Number of male and female staff working per setting**



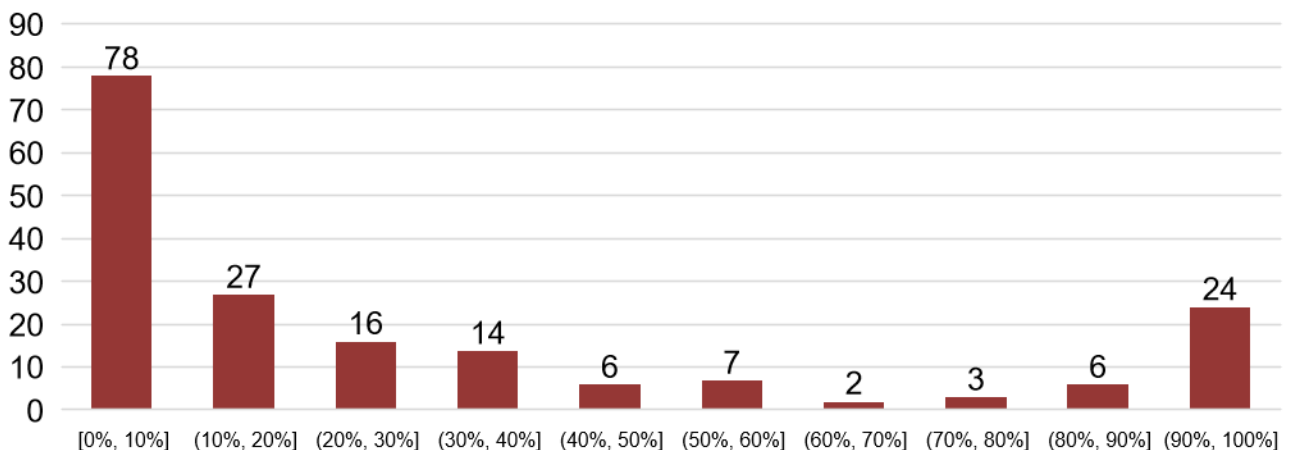
N=103 setting managers reporting on behalf of their settings.

4.28 When asked whether any staff were of a Black, Asian, or Minority Ethnic background according to equal opportunities data, 80 per cent of setting managers responded that this applied to no staff member. A further 12 per cent of setting managers replied that they had one staff member of a Black, Asian or Minority Ethnic background, while another eight per cent of settings employed two or three members of staff of this background.

4.29 According to setting managers' equal opportunities data, 75 per cent of settings answered that none of their staff members had a disability, 18 per cent replied that one staff member was disabled, and seven per cent responded that between two to four of their staff members had a disability.

- 4.30 Asked about how many staff members spoke fluent Welsh, 32 per cent of settings reported no staff member speaking fluent Welsh, 16 per cent had one fluent person, 17 per cent had two, and eight per cent had three fluent Welsh-speaking staff. A further 22 per cent of settings reported having between four and ten fluent Welsh speakers in their setting.
- 4.31 For the purpose of this analysis, this section reports the percentage of Welsh-speaking staff within settings as a share of both full-time and part-time employed practitioners and managers. Among the 183 setting managers who answered the question whether they had any fluent Welsh-speaking staff, 78 settings reported having between 0-10 per cent of staff speaking fluent Welsh (equivalent to 43 per cent of all settings answering the question), 15 per cent of settings reported between 10-20 per cent of staff being fluent in Welsh, eight per cent of settings had between 20-30 per cent of staff being fluent in Welsh, and 13 per cent of settings had between 90-100 per cent of staff speaking fluent Welsh.

**Figure 17: Percentage of fluent Welsh speakers in settings**

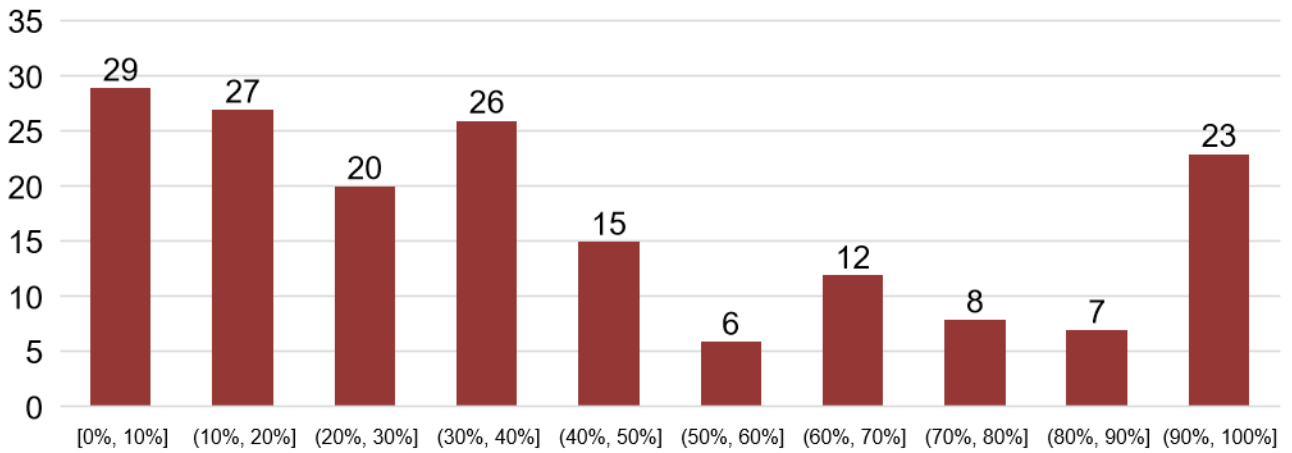


N=183 setting managers reporting on behalf of their settings.

When asked about how many staff spoke a fair bit of Welsh, 173 setting managers responded to the question. A share of 17 per cent of settings reported that between 0-10 per cent of staff spoke a fair bit of Welsh, while 16 per cent responded that between 10-20 per cent of their staff spoke a fair bit of Welsh. A further 35 per cent of settings responded that between 20-50 per cent of their staff spoke a fair bit of Welsh and 13 per cent reported over 90 per cent of their staff speaking a fair bit of Welsh.



**Figure 18: Percentage of workforce speaking fair bit of Welsh in settings**



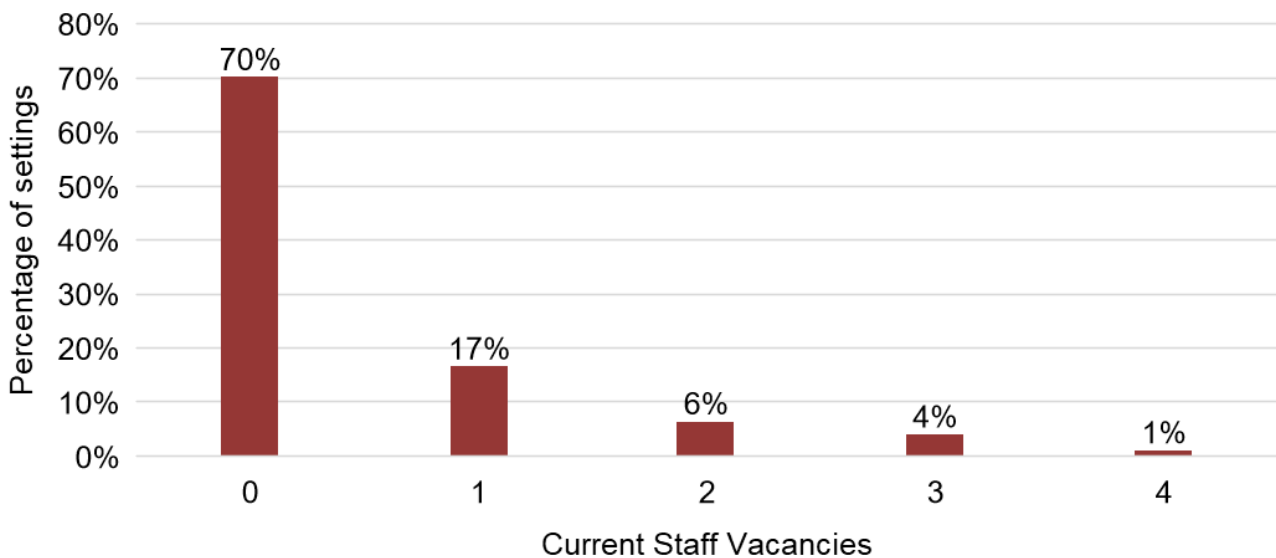
N=173 setting managers reporting on behalf of their settings.

4.32 Finally, setting managers were asked whether they collected information on their staff’s Welsh language abilities. A share of 68 per cent answered “Yes”, while 25 per cent answered “No” and eight per cent preferred not to say.

**Structures and challenges in the sector**

4.33 As part of the survey, setting managers were also asked about their current and past number of vacancies. Among setting managers, 70 per cent reported no vacancies, 17 per cent mentioned one vacancy, while six per cent of setting managers reported two vacancies, four per cent cited three vacancies and another two per cent mentioned between four to ten current vacancies.

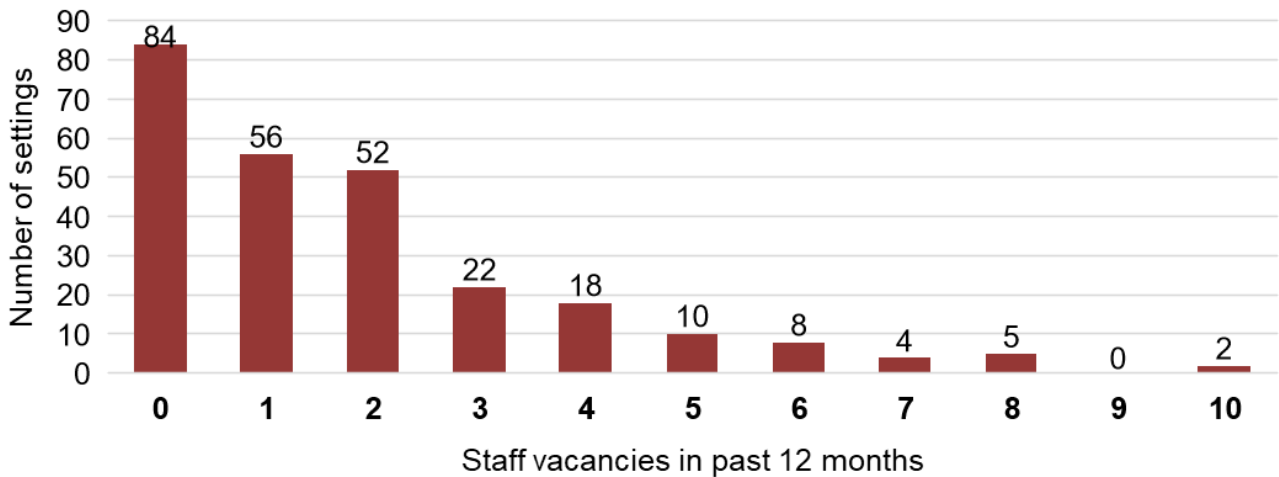
**Figure 19: Current staff vacancies in settings**



N=263 setting managers reporting on behalf of their settings.

When asked about their vacancies in the past 12 months, 32 per cent of settings responded they had no vacancies, 21 per cent reported one vacancy, 20 per cent had two vacancies, and eight per cent had three vacancies. A further 19 per cent of settings reported between five and ten vacancies throughout the past 12 months.

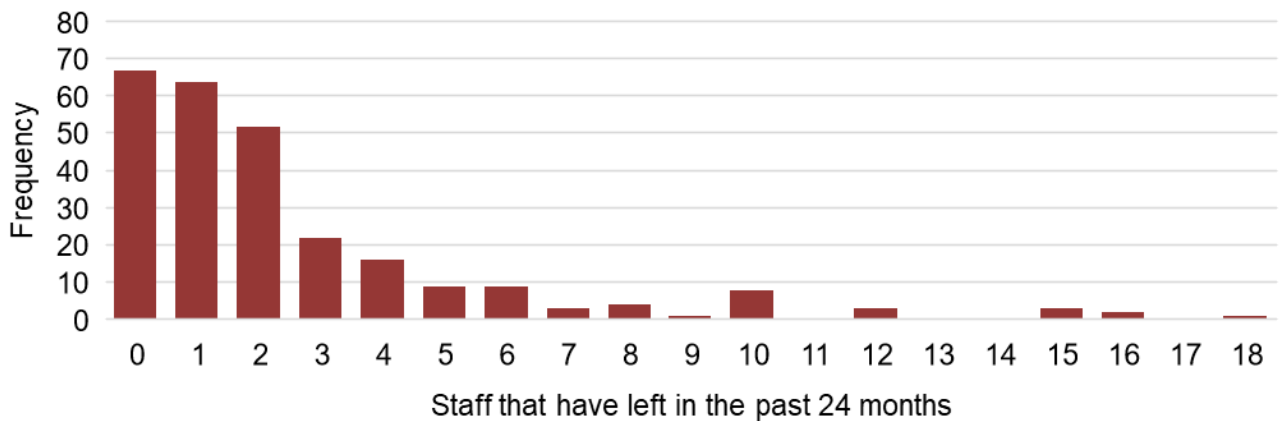
**Figure 20: Number of staff vacancies in past 12 months in settings**



N=261 setting managers reporting on behalf of their settings.

4.34 Closely related to vacancies, setting managers were furthermore asked about how many staff had left their settings in the previous 24 months. The question specified that this could include staff switching to other settings, other sectors, or leaving work entirely. In response, 25 per cent of settings answered that no staff had left in the previous 24 months, 24 per cent reported having lost one staff member, 20 per cent reported two staff members, eight per cent answered three staff members, and six per cent answered that four members of staff had left. Additionally, 13 per cent of responding setting managers reported numbers between five and ten.

**Figure 21: Number of staff having left settings in past 24 months**



N=264 setting managers reporting on behalf of their settings.

- 4.35 Respondents also provided their views on a range of barriers to recruitment and retention in childcare and playwork. Specifically, 78 per cent of respondents cited pay as a barrier, 43 per cent mentioned qualification requirements being too high, 28 per cent raised concerns over hours of work being too long, 25 per cent highlighted competition from other sectors, and 24 per cent of respondents mentioned hours of work being too short. Another 13 per cent of respondents cited other reasons, for example Welsh language requirements for staff, a lack of permanent contracts, the work being too hard or bureaucratic as well as unrealistic expectations in the sector.
- 4.36 Subsequently, setting managers were asked to outline any other problems they faced when recruiting staff for their setting through an open-text question. Respondents most frequently highlighted an overall lack of applications from suitable candidates and significant difficulty with staff recruitment and retention more widely. The most common reason for this difficulty was identified as unattractive low wages and settings often only being able to pay minimum wage. The second most frequently mentioned challenge was finding staff with sufficient levels of qualification or willing to undertake additional qualifications, often without a prospect of increased pay. Setting managers voiced frustrations over not being able to employ staff with high qualifications in adjacent setting types (e.g., schools, playwork or childcare, as well as health and social care), given these practitioners would not count into qualified staff ratios. Other specific issues referenced as reasons for the lack of applications were settings' inability to offer permanent contracts, difficulties offering sufficient work hours given fluctuating needs and numbers of children, as well as sessional settings being unable to offer full-time work in principle. In other cases, setting managers cited long working hours or early and late working hours as being unattractive to applicants as well as prospective applicants preferring part-time positions. Finally, some setting managers highlighted that they were unsure about how best to advertise when searching for new staff.
- 4.37 Relatedly, when asked whether their settings experienced any additional challenges when recruiting Welsh-speaking staff, 39 per cent responded this did not apply to their setting since there were no challenges or problems. A further 31 per cent answered "Yes", 19 per cent answered that this did not apply since they ran an English-medium provision only, and ten per cent preferred not to say.

- 4.38 Subsequently, setting managers were asked to outline problems they faced in their settings when recruiting Welsh-speaking staff in particular. The most frequent answers highlighted a lack of suitable candidates and an insufficient number of applications received from Welsh speakers for respective vacancies. In cases where Welsh speakers did apply, they often did not possess sufficient qualifications to satisfy ratios set by CIW. A number of setting managers furthermore pointed out that competition for Welsh speakers was high, given higher wages in the public sector for positions frequently requiring fluency in Welsh. Instead, settings reported encouraging English speakers to improve their Welsh skills.
- 4.39 Finally, setting managers were asked whether they conducted any equal opportunities monitoring for applicants in their setting which 55 per cent confirmed and 45 per cent did not undertake. Of those settings that previously responded “Yes” to whether they held equal opportunities data on applicants, 75 per cent reported that the share of applications to positions in their settings of a Black, Asian, or Minority Ethnic background in the past 24 months was zero per cent. A further 17 per cent of respondents provided values between one to ten per cent, six per cent answered that this share was between 15 to 50 per cent, and two per cent responded this share was between 80 to 100 per cent.

## **5. Findings from workforce engagement focus groups and interviews**

- 5.1 This section summarises core findings from the stakeholder engagement stage. This consisted of focus groups and individual interviews among childcare and play workers and setting managers, carried out between September and October 2023. In the following, findings will be discussed by topic area while distinguishing findings between the four core workforce groups where possible: playworkers, childcare practitioners, childminders, and setting managers. The order of topics is guided by the original discussion guide design and does not reflect an order of importance.
- 5.2 Among 624 workforce members responding to the wider survey (see Section 4), 34 individuals expressed their interest in participating in follow-up engagement via interviews and focus groups, 15 of whom participated. An additional 14 participants were recruited with the help of stakeholder organisations distributing the invitation to participate in the research directly, resulting in a total of 29 workforce members participating.

### **Respondent characteristics**

- 5.3 Among the 29 respondents participating in the fieldwork, seven were playworkers (seven interviews), eight were childcare practitioners (one interview, seven focus group participants), seven were childminders (one interview, six focus group participants), and seven were setting managers across the childcare and play sector (one interview, six focus group participants). Respondents reported a wide range of experience and years spent working in the sector, spanning from two years up to 35 years. Engagement was conducted with participants working across 12 different local authorities.<sup>8</sup>
- 5.4 Participants described large variations in their working patterns, hours, and levels of responsibility. Playworkers most frequently explained that they worked either before school hours as part of breakfast clubs and/or after school hours in after-school clubs. Further participants worked in open-access play provision and holiday play schemes, characterised by a highly fluctuating number of working hours per day and throughout the year.

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<sup>8</sup> Flintshire, Neath Port Talbot, Carmarthenshire, Merthyr Tydfil, Rhondda Cynon Taf, Wrexham, Conwy, Cardiff, Isle of Anglesey, Vale of Glamorgan, Ceredigion, Powys

- 5.5 In contrast, childcare staff most frequently worked in full day care or sessional settings, with a small number of participants working in settings dedicated to care for children with additional learning needs (ALN). Participants in this group often reported working five days per week and throughout most school holidays.
- 5.6 Childminders exhibited more flexible working patterns, driven by the needs of families and children. Several participants reported that they covered hours before school for children of a wider age range, care during the day for children under school age, as well as school pick-up services and after-school child minding. Working patterns for managers varied widely by setting type and size. Managers were most likely to report working up to ten hours per day in their setting, conducting a mix of tasks from caring for children or providing play opportunities themselves to completing administrative tasks and taking charge of income and funding streams.

### **The state of the sector**

#### *Successes and opportunities*

- 5.7 At the start of each interview and focus group, respondents were asked about successes in the sector as well as opportunities for the workforce and settings. Participants consistently highlighted the rewarding experience of working with children and the wide-ranging influence their work has on children's development. Workforce members across the sector engaging in the research expressed how decisive a qualified and motivated workforce was for children's cognitive and social skills in particular.
- 5.8 It was reported that demand was sufficient across most settings, with many locations experiencing waiting lists. Several participants reported that their settings had expanded their numbers of staff and children throughout recent years. When describing recent successes, participants also reported improvements in collaborations across the sector and increased efforts of sharing best practice between settings (e.g., training courses, upcycling of materials, or designing play activities for children).

#### *Concerns and challenges*

- 5.9 When asked about their views on the state of the childcare and play sector and how it is currently doing, without exceptions, all 29 respondents answered that the sector

was in a “worrying” or “bad” state, most frequently emphasising concerns relating to funding, pay and remuneration, recruitment and retention, as well as lack of recognition of their work (discussed in more detail under “Pay and benefits”, “Funding received by settings”, and “Recruitment and retention”).

- 5.10 A number of participants reported feelings of being underappreciated and left alone during the Covid-19 pandemic, as well as currently while bearing significant responsibilities. Workforce members explained that during the pandemic, they often took on functions of social workers given increasing needs of children or challenges faced by families, citing a lack of support resources for struggling families and not receiving the financial recognition of other “essential workers” such as Flying Start health visitor colleagues. More widely, respondents frequently emphasised a perception of acting as “babysitters” while providing highly skilled and decisive services to families. Especially since the Covid-19 pandemic, workforce members reported that levels of “trauma” and “anxiety” had increased, posing additional challenges for their work and requiring more time and attention for effective safeguarding and supporting children’s mental health.
- 5.11 Respondents, especially a majority of playworkers, furthermore brought up concerns relating to job insecurity and short-term contracts, subject to the nature of their setting’s funding. While this was most frequently discussed by playworkers, staff in childcare settings also raised zero-hour contracts as a source of insecurity and anxiety over their professional future (discussed in detail below).
- 5.12 Respondents frequently discussed recruitment and retention of workforce members as a particular challenge when asked about the state of the sector. Reports of high staff turnover were seen to impact children negatively while increasing pressure on colleagues and setting managers. Some participants expressed the view that once the current pool of talent left the sector, this experience would likely be difficult to replace (discussed in further detail below).

### **Qualifications**

- 5.13 Participants were asked about qualifications they held, whether they were planning to undertake any additional qualifications or were currently in the process of obtaining any, as well as their views on current qualifications. Attendees reported a diverse mix of playwork, childcare, and management qualifications, as well as

training related to fundamental necessities such as regular first aid courses and safeguarding levels, coaching, or mentoring.

- 5.14 Workforce members and setting managers pointed out that students studying childcare or playwork often did not cover fundamental skills and elementary training in their courses and recommended that these should be included in the future. Examples included safeguarding and first aid which are required to commence work in any setting. A lack of relevant information on required qualifications and training was recognised as a wider issue also, where students were felt to be insufficiently informed of their options for college courses and qualifications, despite expressing an interest to later join the childcare and play workforce upon completion of their schooling. Setting managers explained that school graduates would instead study related health and social care courses without realising that this would not directly qualify them to join the childcare or play workforce.
- 5.15 Participants widely agreed that more opportunities should be provided for placements for those studying childcare and related subjects in universities and colleges. Well-funded apprenticeships could furthermore improve staff recruitment, with current pilots cited such as Cardiff Cares Academy.<sup>9</sup> It was highlighted that if students of degree courses other than official Level 2 or higher became better acquainted with the realities in the sector during their studies, this would prepare them better by providing them with the necessary skills, as well as reduce the rate of staff leaving the sector shortly after entering it, given misled expectations. The emphasis of existing academic courses and qualifications on written academic components and essays was seen by some workforce members as too heavy, explaining their perception that the current curriculum at times failed to teach students the practical skills required to succeed once entering the sector.
- 5.16 It was discussed that most qualification and learning currently takes place during evenings and weekends, which is perceived as a significant burden by the workforce who often have additional caring responsibilities within their families. This was perceived as leading to a lower take-up of qualifications, given that an absence of one core member of staff could lead to the closure of an entire setting if remaining staff members are unable to cover ratio requirements.

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<sup>9</sup> Cardiff Cares Academy. See: [Cardiff Cares Academy - Into Work \(intoworkcardiff.co.uk\)](http://intoworkcardiff.co.uk)



- 5.17 Setting managers explained that, given wide-ranging challenges with recruitment and retention, they also often incurred high costs to fund the training of insufficiently qualified staff, particularly in cases of first aid or safeguarding training courses. These costs relate to having to fund temporary vacancies while training staff are off work due to their courses, as well as the cost of the training. Participants therefore most often emphasised the need for an updated system of fully funded qualifications including all required training as a means to motivate and enable people to join the workforce.
- 5.18 Setting managers also emphasised that if pay was tied to qualifications, alongside providing funding for undertaking such qualifications, this would provide an incentive to obtain further qualification levels in the long term.
- 5.19 Attendees furthermore explained that the current qualification system at times required them to hold qualifications unsuitable to their work, with examples cited in work with children with ALN or complex needs, such as cases of autism. Participants reported being required to hold a playwork qualification despite fundamentally requiring different ways of engaging with this group of children. Instead, it was suggested that specialist qualifications should be considered.
- 5.20 Childminders also discussed qualifications and other types of mandatory training to operate their business. They pointed out that mandatory training such as first aid was often very expensive and not available in their local areas, requiring travel on weekends at regular intervals to refresh their knowledge.

### **Welsh-language skills and experiences working through the medium of Welsh**

- 5.21 When asked about their use of Welsh during their everyday work, respondents indicated a wide range of levels of familiarity and use of Welsh. While some reported speaking fluent Welsh and using it exclusively in their work with children and parents, others reported not speaking any Welsh.
- 5.22 Notably, a number of staff members and managers explained that though several of their staff or colleagues were not fully fluent in Welsh, they had often acquired relevant Welsh skills throughout their career, enabling them to introduce children to the language (e.g., through songs, phrases, and basic words). One distinction made frequently by managers and workforce members was that, though often confident working with children in Welsh, staff did not feel equipped to communicate with parents in Welsh. Participants therefore asserted that confidence when interacting

with adults should not be equated with their work with children and that their skills and performance should be evaluated separately.

- 5.23 Setting managers also frequently discussed serious difficulties in recruiting and retaining Welsh-speaking staff members. Regarding retention, it was often explained that salaries were insufficient to motivate staff to stay in their posts, given alternative positions in which they could benefit from their language skills (examples mentioned included work in schools or local authorities). When discussing recruitment, managers explained that they often received an insufficient number of qualified applications for Welsh-speaking posts and were thus unable to provide sufficient Welsh-medium provision for children. Managers highlighted the lack of incentives stemming from insufficient pay and no benefits resulting from additional qualifications obtained, including improved Welsh skills or training in Welsh.

### **Pay and benefits**

- 5.24 During interviews and focus groups, participants were asked whether they felt that their pay reflected the skills and responsibilities that formed part of their work. Without exceptions, all participants answering the question reported they did not feel their work reflected in their pay nor any additional benefits if applicable, constituting a clear message from participating workforce members. A majority of participants highlighted that insufficient pay was a core reason for staff to leave the sector.
- 5.25 Childcare staff and playworkers often reported being paid the minimum wage or slightly above the minimum wage per hour which, they felt, did not reflect their accountability and responsibility for young children, nor the physical and emotional demands of their jobs which included long working hours. Childminders in particular explained that they needed to operate at full capacity at all times in order to remain economically viable and could often not make provisions for time off sick, given their self-employed status. They emphasised the importance of their work on the children's development which they felt was "hugely important" and thus deserved recognition through higher pay.
- 5.26 Examples mentioned several times were higher hourly salaries paid by supermarket chains or teaching assistant positions in schools which were felt to be the single largest factor in staff leaving the sector.

## **Funding received by settings**

- 5.27 During interviews and focus groups, participating setting managers were asked how their settings were funded and how this affected the running of their settings. Participants across setting types most frequently highlighted the difficulties of running an economically viable setting while paying staff at least minimum wage level or slightly above. Detailed accounts varied widely by setting types, given some attendees worked in registered settings within charities, some provided services within schools, and some worked as self-employed childminders, in private day nurseries, and more. Setting managers raised feelings of a constant trade-off: on the one hand, keeping fees low for parents during the current cost of living crisis, recognising families increasingly struggled with the cost of childcare in particular. On the other hand, they recognised that staff were similarly struggling with living costs and the importance of salaries to motivate workforce members to stay in the sector. Setting managers furthermore pointed out that funding rates per place currently do not cover any additional costs incurred by settings, such as repairs or equipment purchases needed.
- 5.28 Another point raised by a number of participating setting managers was challenges with providing adequate provision for children with ALN or other complex support needs. For example, one setting reported charging parents of children with complex needs the same rate as other children in the setting, despite the additional strain on the setting's budget that providing such support creates. Participants agreed on an "urgent need" to provide more dedicated funding sources to employ more staff and enable tailored support to this group of children as well as relieve pressures on staff by allowing for extra funding so that ratios can be reduced during all hours of the children's attendance so that staff can focus individually on children's respective needs. Participants also explained that even where there is currently some additional funding for one-to-one support, at times this may only cover 20 hours per week, with settings having to cover the costs for the remaining hours if children cannot be cared for safely through normal provision.
- 5.29 When asked about funding mechanisms, some setting managers brought up challenges posed by different payment methods, including how payments for

government-funded childcare are made.<sup>10</sup> Setting managers explained that the introduction of the process where funds are being transferred in arrears after submitting claims posed additional challenges to their finances and financial sustainability. The platform for requesting funds for places via the Childcare Offer was praised as functioning well and efficiently, with transfers being made with few delays. In contrast, concerns were raised over the payments from local authorities for places funded through Flying Start, with frequent delays cited and concerns raised over different implementation models across local authorities.<sup>11</sup> Moreover, settings reported extensive challenges with parents receiving funds through either universal credit or student finance and frequently failing to pay settings despite recognising that this may not fall into the remit of Welsh Government childcare policy. Instead, it was reported that settings would be left with the costs and no way of effectively claiming the money which has left settings facing considerable financial debt. Setting managers suggested that funds should be sent to settings directly, or via a platform as currently in use for the Childcare Offer where settings submit their claims for the care provided. Other participants reported that their setting only accepted children from families receiving such financial support if childcare payments were made in advance. In sum, setting managers emphasised the importance of efficient payment systems for all government-funded childcare given the impact on settings' ability to provide longer-term job security to staff members, convert zero-hour contracts into part- or full-time employment, as well as ensuring business continuity for privately managed settings which was seen as vital to the provision of Flying Start and Childcare Offer places across local authorities.

5.30 When discussing the impact that funding had on the running of their settings, participating setting managers widely agreed that they would have wanted to be consulted by the Welsh Government on previous changes to payment timings and structures for childcare funded by the Welsh Government (e.g., frequency of arrears and ways of submitting requests). It was further explained in interviews that changes should have been implemented similarly across different local authorities, given childcare represented a “national issue”. Participating setting managers

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<sup>10</sup> The section provides a summary of points proactively brought up by respondents. Details of this discussion are beyond the scope of this research and more research should be conducted in the future, involving a wider range of stakeholders.

<sup>11</sup> It should be noted that this research mainly engaged with workforce members in third sector and private sector settings. Views of local authorities should therefore be sought in future research to provide a balanced perspective.

explained the relevance of funding streams on the sustainability of their settings and financial stability, thus impacting decisions around recruiting new staff or considering closing down settings in cases of debt.

- 5.31 Childminders discussed their provision of places funded via the Childcare Offer and Flying Start in detail, as well as the implications this had on their ability to continue operating in the sector. They pointed out that funding rates for Flying Start provision, determined by local authorities per hour and child, are capped per week. Many childminders therefore operate at an effective loss compared to minding children from privately paying families. Focus group participants agreed that a regular review and increases of funding per place for both Flying Start and the Childcare Offer would be crucial to their businesses' survival, given that settings are not allowed to charge top-up fees to parents for government-funded hours of provision. When discussing funding, childminders praised the availability of a range of grants to remodel core parts of their workplace – frequently their homes – to the needs of caring for children. However, concerns were raised over different decisions and grants being available across local authorities and little time to complete required paperwork.
- 5.32 Asked about the funding of their settings and how this affected the running of their settings, play settings in particular reported having made applications for external funding, with examples mentioned including National Lottery funding as well as other charitable institutions. When discussing grant funding received from the Welsh Government for play settings, several participants raised concerns that grants are location-specific and thus carry implications for the long-term sustainability of the setting in cases of repurposed buildings, renovations, or evictions. In practice, this meant that in cases of settings having to move premises (e.g., due to school closure or rent increases beyond a sustainable level), the play setting would not be able to apply for the same grant to renovate a different location for a set amount of time.
- 5.33 During the focus groups and interviews, workforce members across setting types also frequently discussed the implications of the Flying Start expansion in their settings, in particular the Phase 2 expansion consisting only of the childcare element. While welcoming the expansion of the programme and the ambition to provide childcare for all two-year-old children, practitioners and setting managers alike raised concerns over their ability to provide high-quality care for all eligible children. Referring specifically to Phase 2 of the expansion, setting managers cited

the lack of involvement of health visitors or speech and language therapists with whom an information exchange under the core Flying Start programme had been viewed as highly valuable. Participants furthermore explained that their ability to provide high-quality childcare and support child development with a tailored approach to each child was limited, given the lack of support for families more widely and the lack of sufficient background information received on children before they first attend the setting. This was felt to impact the quality of care provided and placed additional burdens on staff members. Workforce members furthermore argued that, in their opinion, funding for places for two-year-olds could be brought in separately rather than via Flying Start since this caused confusion among settings and parents.

#### *National minimum standards*

- 5.34 A core area of discussion related to funding and costs was the requirements set via the National Minimum Standards (NMS). Participants in sessional and full-time daycare, as well as childminders, frequently discussed ratios for children of specific ages and relative to staff qualifications.
- 5.35 Opinions diverged over the 1:4 ratio of staff to children for two-year-olds, with some participants explaining that this ratio was the minimum for ensuring the safety of children while not overburdening staff. Other participants disagreed, stating that current ratios were economically not viable for settings, particularly if providing places funded via Flying Start or the Childcare Offer rather than paid privately by parents. Several workforce members also pointed out that children frequently have additional needs in which case the applicable ratios are felt to be unsuitable.
- 5.36 Playworkers highlighted concerns surrounding the registration of open-access play provision, such as play vans covering different locations. Participants explained that all such locations would have to be registered separately which led to considerations of shortening times of provision to avoid registration and thus lower administrative burdens. Similarly, other participants raised concerns over registration units being both location- and setting-specific. In practice, this meant that their settings have had to re-register completely if forced to move to a different location or if changing their constitution (e.g., becoming a charity with an advisory board). It was instead suggested to reduce the burdens resulting from such changes and provide a streamlined route for re-registering.

- 5.37 Childminders raised additional concerns around registration and ratios specific to their role in the sector. Several childminders participating in the research highlighted delays in registration and that if a childminder seeks to enter the sector and register, this should be swift and efficient with respondents referencing delays of 8-12 months in some cases. Nevertheless, the core concern raised by childminders was related to ratios, and a majority of participating childminders called for more flexibility. It was suggested that individual risk assessments should be applied, and slightly exceeding the ratios should be possible in exceptional circumstances (e.g., during the brief overlap until children are picked up). They emphasised that the daily maximum number of children should be adjusted to the realities of childminders' working patterns, which often included a mix of ages before and after school, school drop offs, as well as care during the daytime. Regarding inspections, childminders pointed out that the language used often felt "harsh" and showed a "lack of appreciation" by using terms such as (in-)adequate.
- 5.38 Setting managers raised concerns that inspections were often dependent on "luck" with inspectors and on the children's well-being on a given day. Staff members reported that if one or several children were experiencing a difficult day, this had influenced inspections to the extent that such inspections did not adequately reflect the quality and skills of a setting. Instead, setting managers recommended that inspections should also recognise what settings can do well rather than what may be lacking.
- 5.39 Finally, some participants felt that schools were under less pressure to fulfil similarly stringent requirements as set by CIW for childcare regarding ratios and passing inspections, leading to feelings of underappreciation and a lack of a "level playing field" between schools and childcare settings in particular.

### **Recruitment and retention**

- 5.40 A core concern voiced by workforce members, as well as setting managers, was "severe challenges" with recruitment and retention. Several participants in interviews and focus groups described the current crisis as "the worst we've ever seen", referring primarily to recruitment, while accounts of staff retention differed more substantially across settings. Setting managers explained that many of the applications they received were from unqualified staff which would not allow them to

maintain the required ratios and thus were insufficient to fill the gaps left by experienced staff leaving.

- 5.41 When asked about specific strategies for boosting recruitment, attendees felt they “had tried everything”, ranging from collaborations with local colleges and offering placements, to advertisements, social media outreach, advertising in schools, and contacting previous staff members who had left the sector. However, most settings described not having a dedicated strategy or targeting in their setting but primarily trying to reach any potential workforce member with relevant qualifications. This was discussed in particular detail when participants were asked about recruitment strategies to increase diversity within staff settings. Setting managers highlighted that their first priority was filling vacancies, citing the recruitment of male staff or workforce members of ethnic minority backgrounds, as well as neurodiverse staff, as being “down to luck”. Participants widely recognised the crucial importance of a diverse workforce, especially their function as role models for children and their positive contribution to staff culture. Relatedly, some participants raised their concerns that anti-racism was currently an “afterthought” in the sector and that where Black, Asian and Minority Ethnic people worked in settings, it was rarely in managerial roles.
- 5.42 When discussing strategies for retaining staff, managers explained that they frequently tried their best to offer flexibility and slight improvements in staff salaries, even if at the expense of their own workload as managers. Participants across all workforce groups stated that pay and remuneration was a core reason for staff to leave settings and the sector in general, followed by challenges in obtaining permanent contracts or being offered enough work hours, and high amounts of pressure given insufficient funding in the sector. It was therefore highlighted that openly showing appreciation for staff was crucial, and participants agreed that attempts should be made to accommodate workforce members’ needs, for example, shorter days or four-day work weeks in case of other caring responsibilities. Moreover, recent Universal Credit increases were brought up as a contributing factor to existing staff members requesting a reduction in working hours or leaving work altogether. Given recent adjustments in payments, staff were reported to risk exceeding the income threshold and being worse off if losing Universal Credit benefits. Playworkers identified an additional challenge in their case due to the seasonal nature of their work. This participant group explained their



difficulties in building up a skilled long-term workforce, given most playworkers (e.g., those working in summer holiday schemes) have other term-time positions.

- 5.43 Workforce members and setting managers alike raised schools as the central competitors for childcare and playwork workforce members, providing a number of benefits incentivising staff to leave the childcare and play sector. Attendees frequently mentioned better working hours in schools and longer summer holidays. Participants furthermore mentioned supermarkets and retailers as paying better wages for less responsibility and thus incentivising staff to leave the sector. Other areas of staff loss named were to agencies which were seen as paying better wages for filling in at settings on a needs basis. The model of having to use agencies to fill in gaps within the settings' workforce in case of vacancies or staff members off sick was criticised by setting managers in particular, highlighting financial drawbacks of this model as well as negative impacts on children getting attached to temporary staff.

#### **How participants viewed their personal future and the sector's future**

- 5.44 Participants were asked about how they viewed their personal future in the sector, as well as the future of their settings in the case of managers in childcare and playwork. Answers differed widely from expressions of optimism and resilience, to doubts over whether settings would be able to remain open throughout the next five years, to reports of settings in debt or likely to close. Setting managers were particularly likely to emphasise the high costs of running their settings despite insufficient funding, as well as the impact of the cost-of-living crisis on staff members and parents.
- 5.45 A number of respondents across childcare, playwork, and childminding also voiced concerns over being unable to compete with schools. In particular, they referred to childcare and play provision for children from age two onwards. Some settings reported worries over their intake, given lower prices for parents in school-based settings. A related example brought up by workforce members regarded changes in the intake of children by settings which did not provide Flying Start or Childcare Offer-funded places. It was explained in the interviews that the provision model of such day nurseries or childminders may soon shift further towards children below the age of two. Participating workforce members explained that families would instead choose to take up places in other settings funded through Flying Start and

the Childcare Offer. Settings not offering funded places for children above the age of two expressed concerns that they would receive a majority of requests for places for children below the age of two, which would require higher staff-to-child ratios and thus cause concerns over economic viability going forward, given this focus on younger children.

### **Suggestions for the future**

- 5.46 Participants across focus groups and interviews raised a number of suggestions for the future and how to support the sector. First, workforce members across childcare, playwork, and childminding emphasised the importance of being consulted ahead of policy changes or any modifications in policy implementation (e.g., the expansion of Flying Start, ratios being changed, or changes to payment modalities for Childcare Offer or Flying Start). It was felt that more transparency around policy changes and payment methods was needed to make workforce members feel recognised and respected, as well as allow settings to adjust to incoming changes more flexibly.
- 5.47 Secondly, attendees emphasised the need for more flexibility around qualifications, ratios, and enabling people to easily enter or re-enter the sector, given current staff shortages were seen as likely to get worse over time. Several workforce members and setting managers emphasised that enabling easier access to funded apprenticeships, as well as to qualifications and training (financially and in terms of time intensiveness), would substantially support settings in filling their vacancies. Participants also drew a direct link between this approach to motivating individuals to join the sector and current reports of a lack of practical skills by new entrants.
- 5.48 Third, setting managers in particular often suggested the adoption of features of childcare and play policy in England where successful. Examples mentioned were an expansion of the Childcare Offer to 9-month-old children and increasing the number of hours of funded childcare for younger children in Wales since these would support families and provide increased financial security for settings.

## 6. Projecting the childcare and playwork workforce

- 6.1 A model was developed to project the demand for childcare and play places, and the resulting demand for the childcare staff and playworkers likely to be needed to sustain any necessary changes to provision.
- 6.2 The assumptions and related evidence underpinning these projections are summarised in detail in Annex D.

### Baseline

- 6.3 The baseline is the current number of children on books and the number of workers in each setting type as of 2023. The data is taken from the Care Inspectorate Wales' Self-Assessment of Service Statements, an online form that all childminders and childcare and play providers complete on their setting. The baseline is based on this data alone, without any additional assumptions or adjustments, save for adjusting the baseline figures to account for a 91 per cent response rate of the SASS 2023.
- 6.4 The following table shows the number of children on books in 2023, based on analysis of Care Inspectorate Wales's Self-Assessment of Service Statements (SASS).

**Table 2: Children on books by setting type**

Setting type	Number of children on books (2023)	Share of total places
Childminder	11,390	10%
Creche	285	>0%
Full Day Care	64,334	59%
Open Access Play Provision	2,994	3%
Out of School Care	20,938	19%
Sessional Day Care	9,302	9%
<b>Total</b>	<b>109,243</b>	<b>100%</b>

Source: Alma Economics childcare and playwork Workforce Demand Model

- 6.5 In 2023, the majority of children on books (64,334 children) were enrolled in Full Day Care. The next most common setting type were Childminders and Out of School Care, with 11,390 and 20,938 children on books respectively. Creches were relatively uncommon, with only 285 children on books in total. In total, there were 109,243 children across all setting types.

6.6 The following table shows the number of workers employed in each type of childcare and play setting in 2023, based on analysis of the Care Inspectorate Wales’s Self-Assessment of Service Statements (SASS).

**Table 3: Number of childcare and play workers by setting in 2023**

Setting type	Number of staff (2023)	Percentage of total workforce
Childminder	820	5%
Creche	83	>0%
Full Day Care	11,695	70%
Open Access Play Provision	163	1%
Out of School Care	1,982	12%
Sessional Day Care	1,894	11%
<b>Total</b>	<b>16,638</b>	<b>100%</b>

Source: Alma Economics childcare and playwork Workforce Demand Model

6.7 Overall, there were over 16,000 workers in the childcare and play sector according to the SASS data. Full Day Care has the highest share of workers in its setting, making up 70 per cent of workers across all settings.

### **Estimates of potential demand for places not currently met**

6.8 Estimates of potential demand for places that are not currently being met by the sector have been derived from data reported in ‘Retention and return: Delivering the expansion of early years entitlement in England’.<sup>12</sup>

6.9 It should be noted that these estimates have been derived using two different bases: (i) for Childminders, potential demand for places has been estimated using the assumption of an average of three children on waiting lists per Childminder, and (ii) for other settings (not Childminders), potential demand for places has been derived using an assumption of 12 per cent for the average capacity for private childcare providers to expand places. These estimates are shown in the table below.

<sup>12</sup> Retention and return: Delivering the expansion of early years entitlement in England. See: [Retention and Return: Delivering the expansion of early years entitlement in England — Early Education and Childcare Coalition \(earlyeducationchildcare.org\)](https://www.earlyeducationchildcare.org/)

**Table 4: Potential demand for places not currently met**

Setting type	Estimated potential demand for places not currently met	Potential demand for places not currently met as a proportion of current places
Childminder	2,461	22%
Creche	34	12%
Full Day Care	7,656	12%
Open Access Play Provision	356	12%
Out of School Care	2,492	12%
Sessional Day Care	1,107	12%

Source: Alma Economics childcare and playwork Workforce Demand Model

6.10 Potential demand for Childminder places as a proportion of current places is greater than for any other type of setting – with 22 per cent of estimated potential demand for Childminder places not currently met by Childminder settings. For all other setting types, estimated potential demand is a smaller proportion of current provision, at 12 per cent of current provision (driven by the assumption stated above).

### **Population projections**

6.11 The model uses population projections to estimate projected demand for childcare and play places, and subsequent demand for workers across each setting to provide these additional places. The projected demand excludes the impact of the Flying Start expansion.

6.12 The future demand for places and workers was projected using the baseline figures for demand for childcare places and workers and then applying Office of National Statistics population projections for young people. These projections are developed based on assumptions of future trends in mortality, fertility, and migration. Projected changes in service demand were then translated to changes in workforce demand, using assumptions on the ratio of workers to places. Additional detail on how the ratio of workers to places was calculated is provided in Annex D.

### **Demand for childcare and play provision**

6.13 The following table shows the projected number of children on books over five years.

**Table 5: Projected number of children on books**

Setting	2023	2024	2025	2026	2027	2028	Percentage change (2023-28)
Childminder	11,390	10,952	10,292	10,507	10,509	10,610	-7%
Creche	285	291	292	294	296	296	4%
Full Day Care	64,334	60,447	61,724	61,747	62,341	62,617	-3%
Open Access Play Provision	2,994	2,958	2,923	2,888	2,825	2,735	-9%
Out of School Care	20,938	20,308	19,634	18,705	18,198	17,943	-14%
Sessional Day Care	9,302	9,503	9,506	9,600	9,643	9,639	4%
<b>Total</b>	<b>109,243</b>	<b>104,460</b>	<b>104,370</b>	<b>103,742</b>	<b>103,812</b>	<b>103,840</b>	<b>-5%</b>

Source: Alma Economics childcare and playwork Workforce Demand Model

6.14 In total, the demand for childcare is expected to decrease by five per cent across all settings, which reflects an expected fall in the population of young children. However, this impact varies across different settings. For example, Out of School Care is expected to see a 14 per cent decrease in demand while both Creche and Sessional Day Care will see a four per cent increase in demand. The differences in projected demand across settings are based on different starting levels of demand, and differing population projections for different age groups. Each setting type has a different proportion of children from each age group, and some age groups are projected to increase in population more than others, affecting projections of demand.

### **Workforce projections**

6.15 The following table shows implied changes to workforce demand resulting from the change in demand for places. Workforce projections were estimated by taking the projected level of childcare demand for places and translating that into workforce demand. This analysis uses the child-staff ratio for each setting in 2023 and assumes this stays constant. The baseline scenario also assumes there is no change in vacancies for each setting year on year. Additional detail on the modelling assumptions used to project workforce demand is provided in Annex D.

**Table 6: Projected change in demand for workers**

Setting type	2023	2024	2025	2026	2027	2028	Percentage change (2023-2028)
Childminder	820	789	741	757	757	764	-7%
Creche	83	84	84	85	86	86	4%
Full Day Care	11,695	10,988	11,221	11,225	11,333	11,383	-3%
Open Access Play Provision	163	161	159	157	154	149	-9%
Out of School Care	1,982	1,923	1,859	1,771	1,723	1,699	-14%
Sessional Day Care	1,894	1,935	1,936	1,995	1,964	1,963	4%
<b>Total</b>	<b>16,638</b>	<b>15,881</b>	<b>16,000</b>	<b>15,950</b>	<b>16,016</b>	<b>16,043</b>	<b>-4%</b>

Source: Alma Economics childcare and playwork Workforce Demand Model

- 6.16 Overall demand for workers across all settings is projected to decrease by four per cent over five years. The biggest expected decline in the workforce is expected to be in Out of School Care, which is projected to experience a 14 per cent decrease. Demand for workers in each of Creches and Sessional Day Care settings is projected to increase by four per cent by 2028. The differences in projected demand across settings are driven by differing population projections given the age groups each setting caters for.
- 6.17 Under baseline assumptions, to support the meeting of local authority targets for Welsh-medium early years provision, we project that the number of childcare and play places offered through Welsh-medium would need to increase by around 25 per cent by 2028, requiring around a 25 per cent increase in the number of staff who can provide services through the medium of Welsh.

### **Expansion of the childcare element of the Flying Start programme**

- 6.18 In addition to the population projections, the expansion of the childcare element of the Flying Start programme to all 2-year-olds has been modelled to understand the impact this will have on demand for places and associated workforce requirements.
- 6.19 Based on core modelling assumptions, this would require an increase in the provision of places by around 20 per cent by 2027/28 (equivalent to around 20,000 places), compared with the model baseline, requiring an expansion in staffing of around 24 per cent compared with baseline levels (equivalent to around 4,000

staff). The projected increases in staffing are expected to be proportionally more than the increase in demand for places, reflecting assumptions around the relative staff-to-place ratio for the types of childcare and play services impacted, which are primarily concentrated around day care service provision. The increase in demand for childcare and play services from the expansion of Flying Start would be slightly offset by a projected fall in the size of the underlying child populations across most age groups.

6.20 There is some uncertainty around how parents will respond to the introduction of the expansion of the childcare element of Flying Start. In order to account for this, we consider how adjusting the percentage of families taking up the offer of Flying Start changes the projected demand for childcare places and subsequent demand for workers. The following table shows the additional workforce requirements resulting from the expansion of the childcare element of Flying Start based on different take-up rates, where 87 per cent is the current take-up rate based on Welsh Government Flying Start statistics from 2021/22<sup>13</sup>.

**Table 7: Additional workforce required for Flying Start expansion by take-up rate**

Take-up rate	Additional workforce required in 2028 (percentage change from model baseline)
<b>87% (core assumption)</b>	24%
<b>60%</b>	16%
<b>40%</b>	11%
<b>20%</b>	5%

Source: Alma Economics childcare and playwork Workforce Demand Model

6.21 As shown in the table, the additional staff required due to the expansion of the childcare element of Flying Start is sensitive to changes in the expected take-up rate. For example, the additional workforce requirements will roughly halve if the take-up rate is also halved.

6.22 There is also some uncertainty around what percentage of families taking up Flying Start are already utilising self-funded childcare. If a greater proportion of families are “displaced” from self-funded childcare, rather than having not previously used childcare, the impact on overall demand for places and workers will be lower. The

<sup>13</sup> Flying Start: April 2021 to March 2022. See: [Flying Start: April 2021 to March 2022 \(Welsh Government\)](#)



following table shows the implications for the projected number of children on books in 2028 based on differing displacement rates.

**Table 8: Additional workforce required for Flying Start expansion by displacement rate**

Displacement rate	Additional workforce required in 2028 (percentage change from model baseline)
20% (core assumption)	24%
40%	18%
60%	12%

Source: Alma Economics childcare and playwork Workforce Demand Model

6.23 As shown in the table above, the expected increase in workforce requirements due to the expansion of the childcare element of Flying Start is also materially affected by the displacement rate assumption (see Appendix D for detail). For example, increasing the displacement rate from 20 per cent to 40 per cent will result in the reduction of additional workforce requirements from 24 per cent to 18 per cent.

### **Caveats and limitations**

6.24 It should be noted that these findings are subject to several caveats and limitations of the analysis. In particular, the projections are forward-looking, and so are subject to a degree of uncertainty, reflecting uncertainty in how parents would respond to future policy changes (i.e., take-up), as well as uncertainty around future demographic trends. There are also key gaps in the data and evidence, including limited evidence of impact on take-up of changes to key policy programmes, and the extent to which any additional take-up will displace demand from other childcare and play services. This has required the need to make assumptions where necessary, which may limit the accuracy of the result.

6.25 Demand for childcare is driven by a complex array of factors, several of which are not captured within the model. Such factors include changes to the cost of childcare, parental income and employment situations, and the wider government policy landscape (amongst other drivers).

6.26 The model projects future demand for services and the workforce and does not attempt to model the impact of supply-side constraints. In particular, the findings from the fieldwork with childcare and play workers suggest there are likely to be challenges in being able to retain and recruit enough staff to meet the projected future demand for places under the Flying Start expansion.

## **7. Analysis of Lifelong Learning Wales Record data (LLWR)**

### **About the LLWR dataset**

- 7.1 The LLWR dataset provides the official source of statistics on post-16 provision (non-higher education learners in Wales), outside of school sixth forms. The data collected by the Welsh Government via the LLWR underpins many aspects of its work, including the planning, funding, monitoring, and quality assurance of post-16 provision.
- 7.2 There are variables of interest for understanding the current and future childcare and playwork workforce included within the database. This includes for each learner recorded on the database the level and type of their qualification, details on their employer (or if unemployed), demographic characteristics, and socio-economic characteristics (including if the respondent considers themselves to be a Welsh speaker, and their age, gender, ethnicity, local authority, disability status, and more).<sup>14</sup>

### **About the LLWR dataset**

- 7.3 As part of Phase 2 of this research, we analysed an extract of the LLWR data provided by the Welsh Government to understand the quantity and nature of learners enrolling in adult and playwork relevant qualifications. This data extract spanned all post-16 learners in Wales who started a qualification relevant to childcare and playwork between calendar years 2017 and 2022 (inclusive).

### **Findings from analysis of LLWR data – total qualification starts**

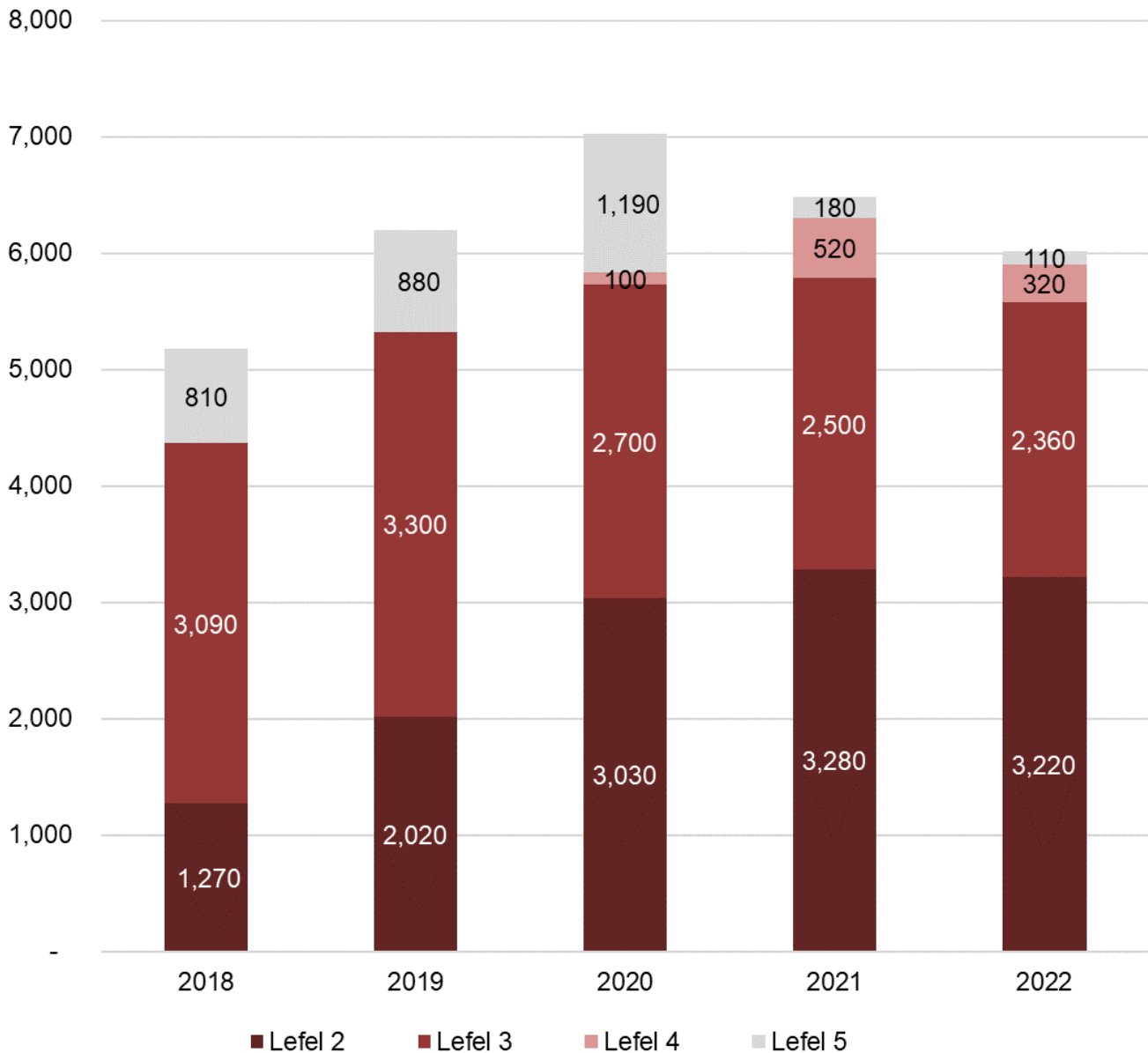
- 7.4 This sub-section summarises the key findings from our analysis of the LLWR dataset, which provide insight into the research questions provided by the Welsh Government. Topics the analysis covers include the total number of qualifications started, qualification completion rates, types of qualification started, Welsh-medium provision of qualifications, Welsh language ability of learners enrolling in qualifications, and the geographical dispersion of the qualifications being undertaken.
- 7.5 Figure 22 below shows that there is no clear trend over time in the total number of childcare and playwork qualifications starts between calendar years 2018 and 2022,

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<sup>14</sup> Lifelong Learning Wales Record user support manual for learning providers (XML) 2021/22. See: [Lifelong Learning Wales Record \(Welsh Government\)](#)

with total qualification starts peaking in calendar year 2020 before declining through to 2022.<sup>15</sup> During the same period, the number of starts for Level 2 and Level 4 qualifications increased whilst the number starting Level 3 and Level 5 qualifications declined.

**Figure 22: Number of childcare and playwork qualifications started, by level of qualification (by calendar year)**



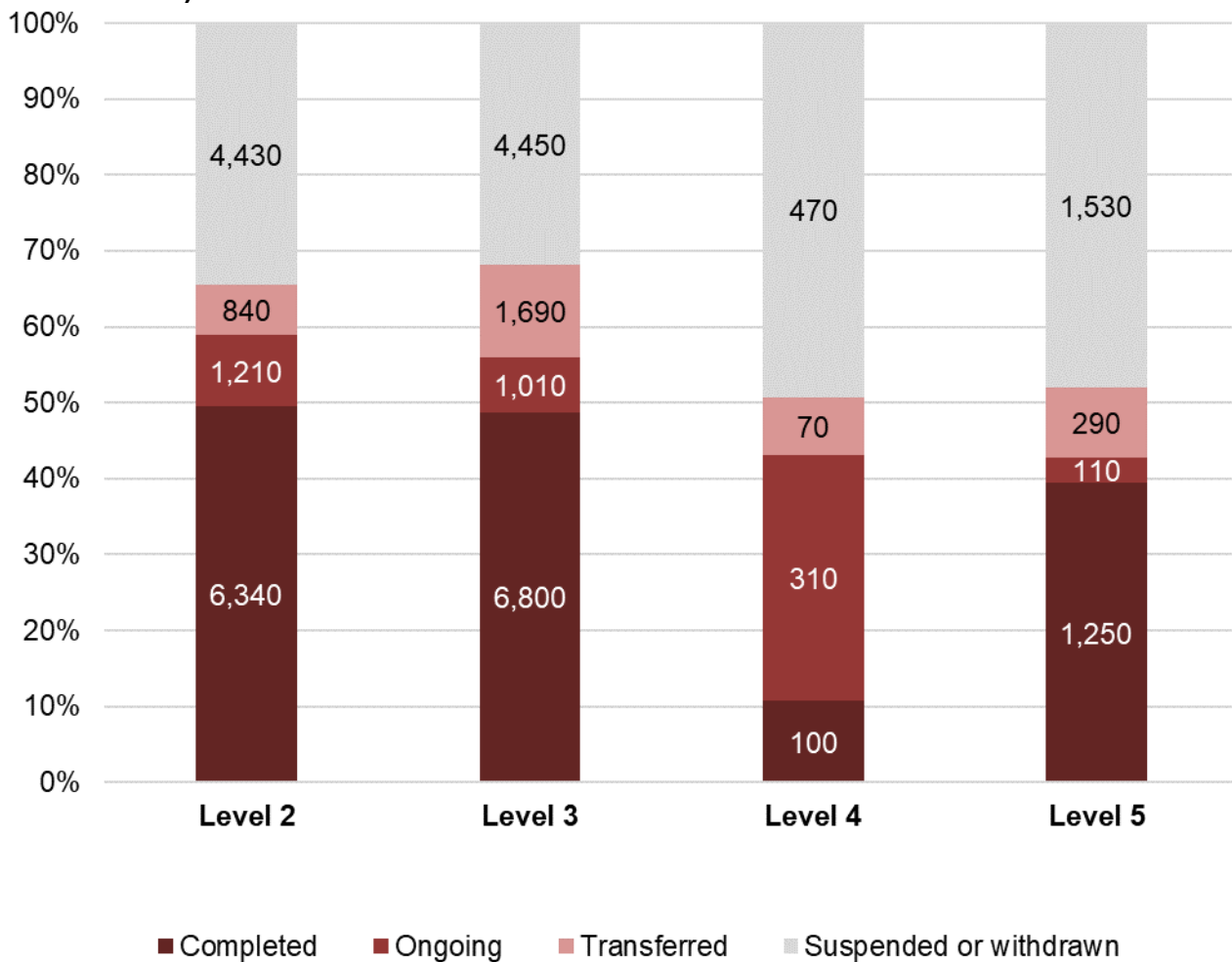
Source: LLWR data (counts rounded to the nearest 10)

7.6 Figures 23 and 24 show that the completion rate for childcare and playwork qualifications was found to vary depending on the level of each qualification, with completion rates of around 50 per cent for Level 2 and Level 3 qualifications,

<sup>15</sup> All analysis is presented on the basis of calendar years.

compared with completion rates of around ten per cent and 40 per cent for Level 4 and Level 5 qualifications respectively.<sup>16</sup> It should be noted that the lower completion rate for Level 4 qualifications was partly driven by a larger share of Level 4 qualifications being ongoing compared with other qualification levels.

**Figure 23: Outcomes of childcare and playwork qualifications starts, by level of qualification (for qualifications started between calendar years 2018 and 2022)<sup>17</sup>**

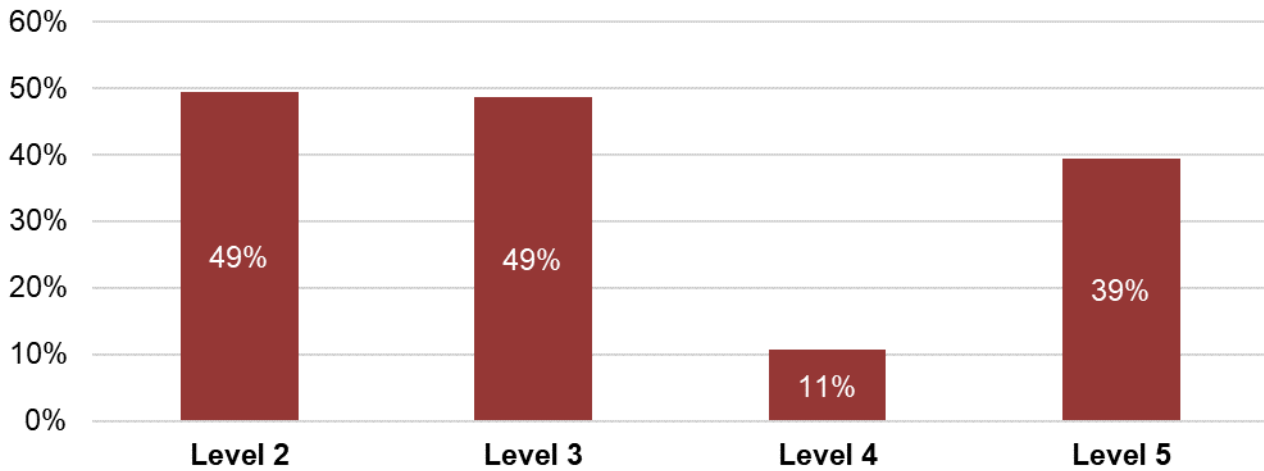


Source: LLWR data (counts rounded to the nearest 10)

<sup>16</sup> The completion rate has been calculated as the proportion of childcare and playwork qualifications that were started and completed, as a proportion of all childcare and playwork qualifications started between calendar years 2018 and 2022.

<sup>17</sup> Reported transfer figures also an artifact of how qualifications spanning more than one year are recorded and so may not necessarily relate to a transfer to a different course.

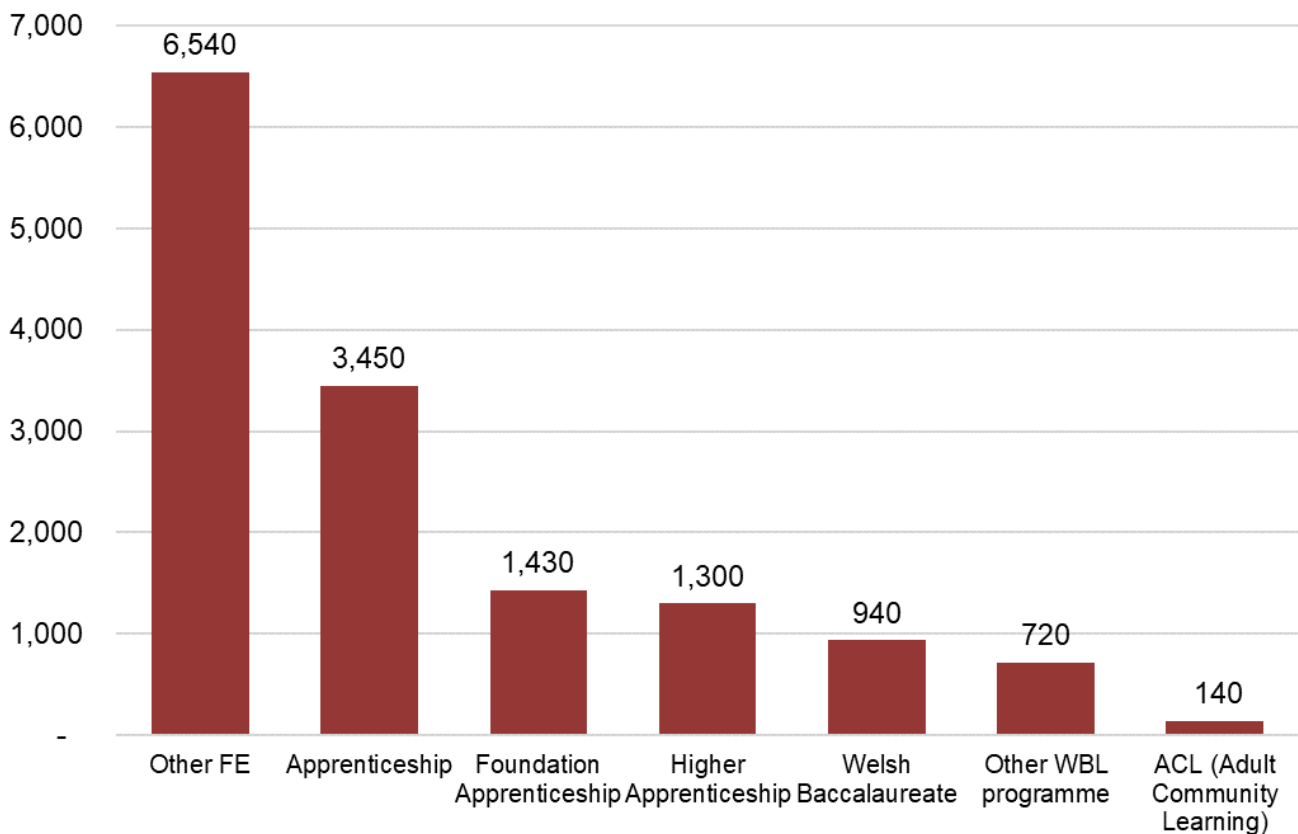
**Figure 24: Completion rates for childcare and playwork qualifications, by level of qualification (for qualifications started between calendar years 2018 and 2022)**



Source: LLWR data

7.7 Figure 25 shows that the most prevalent types of qualifications started were classified as either “Other further education” or a form of apprenticeship (including “Foundation” or “Higher” apprenticeships).

**Figure 25: Number of qualifications by type (for qualifications started between 2018 and 2022)**

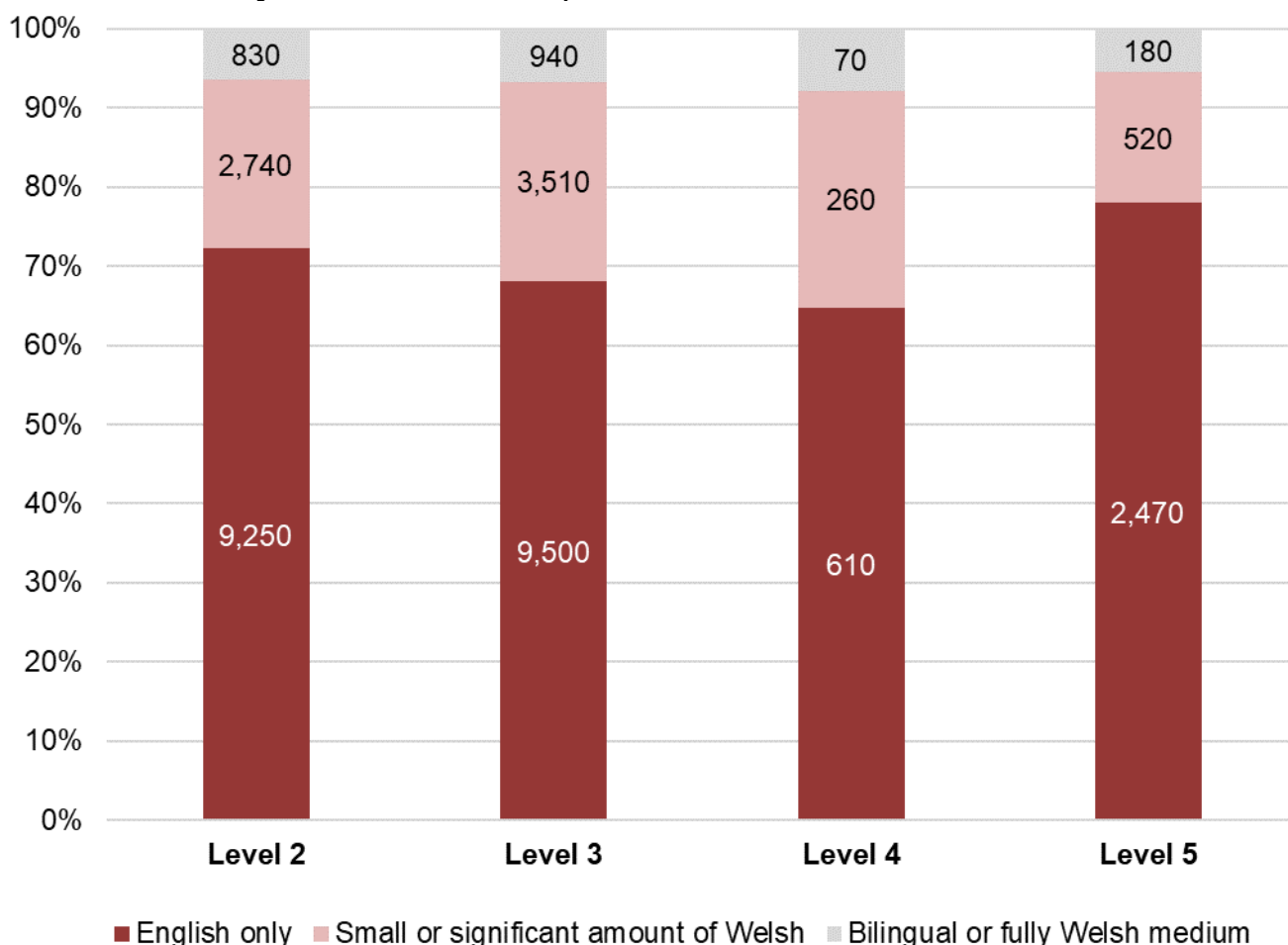


Source: LLWR data (counts rounded to the nearest 10)

7.8 Figure 26 shows that the majority of childcare and playwork qualifications at all levels were conducted in English only, with the share of bilingual qualifications varying between around five and ten per cent depending on the level of qualification. A sizeable share of qualifications were also conducted in settings offering education involving small or significant amounts of Welsh.

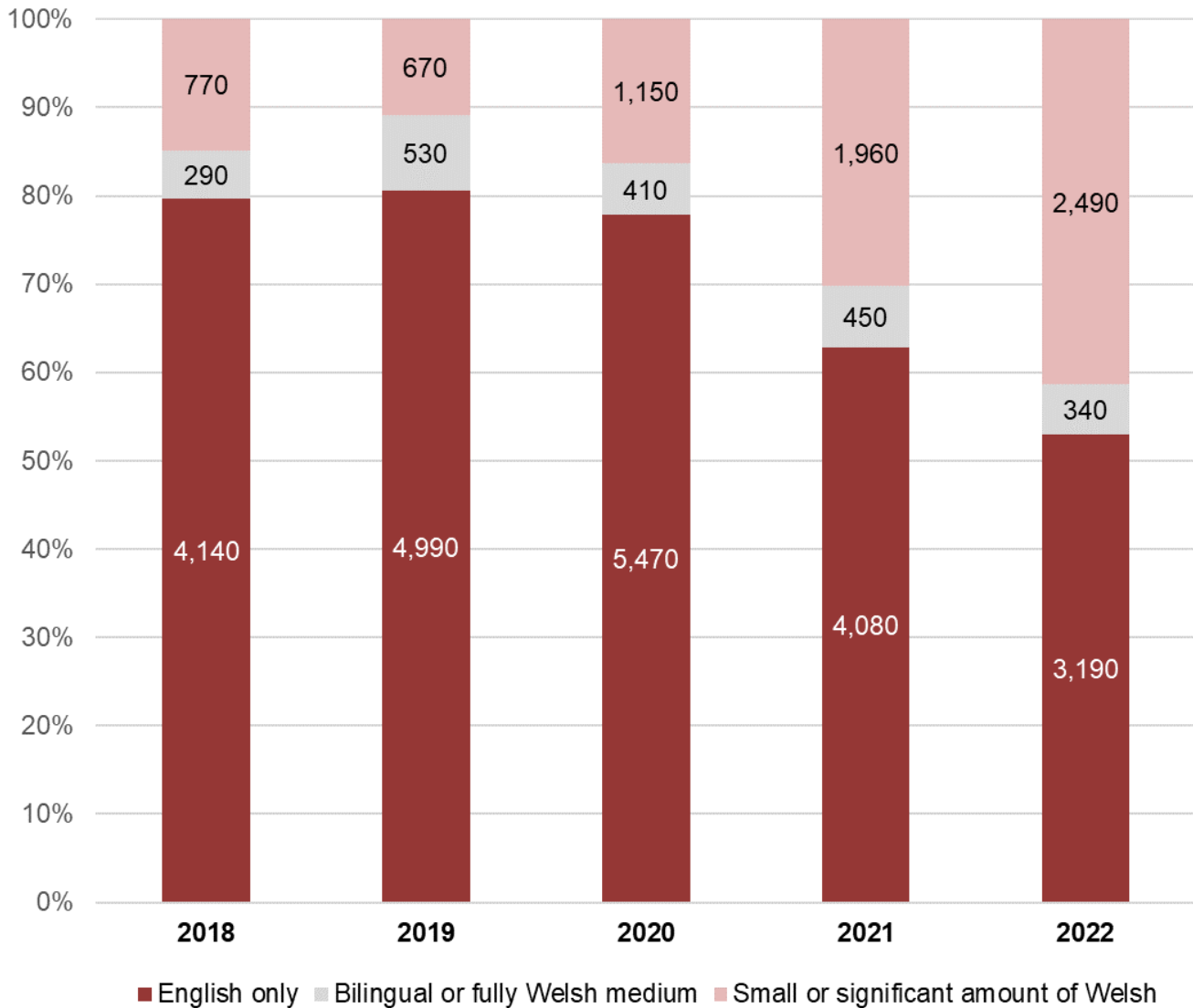
Figure 27 shows that the share of qualifications started and involving at least a small amount of Welsh language provision has increased from around 20 per cent of all qualification starts between calendar years 2018 and 2020, to around 45 per cent by 2022, driven primarily by an increase in the number of qualifications delivered with a small or significant amount of Welsh.

**Figure 26: Share and number of qualifications started by level of Welsh-medium provision, by level of qualification (for qualifications started between calendar years 2018 and 2022)**



Source: LLWR data (counts rounded to the nearest 10)

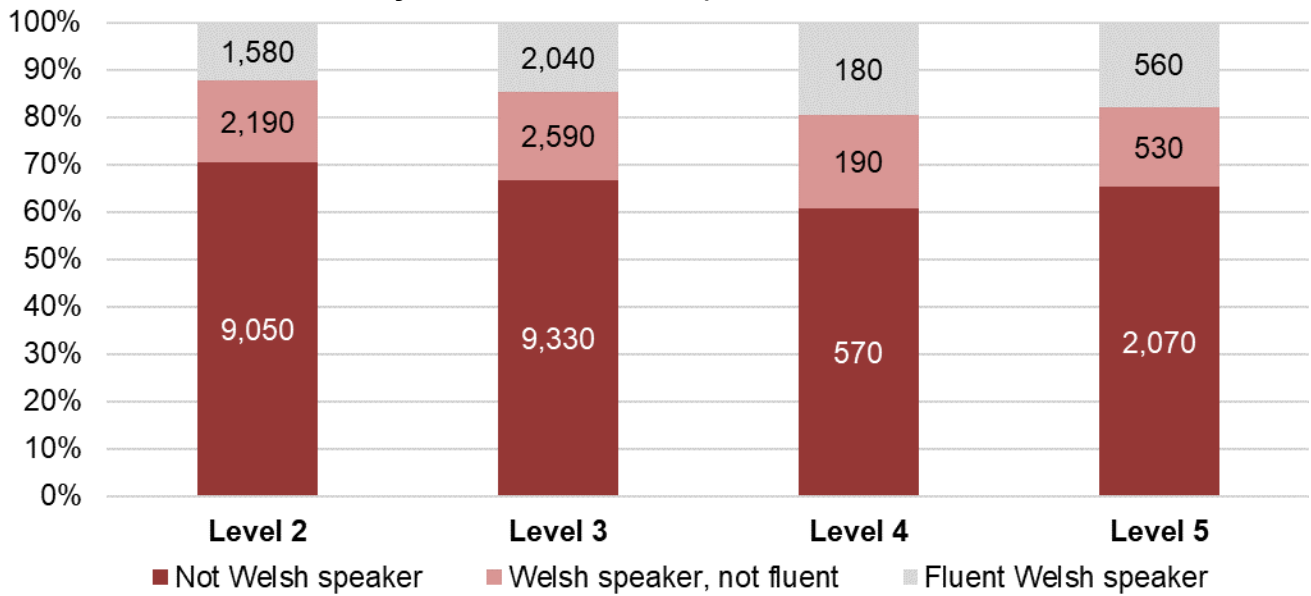
**Figure 27: Share and number of qualifications started by level of Welsh-medium provision, by year (for qualifications started between calendar years 2018 and 2022)**



Source: LLWR data (counts rounded to the nearest 10)

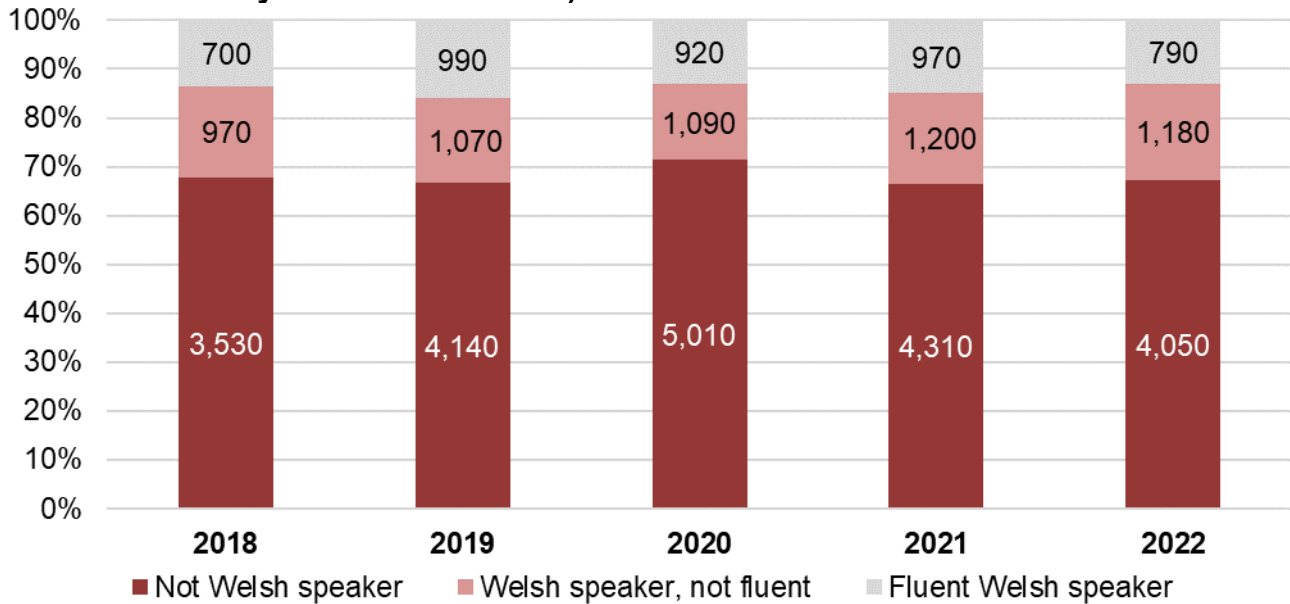
- 7.9 Figure 28 shows that between 30 per cent and 40 per cent of childcare and playwork qualifications started are undertaken by learners who are either fluent or non-fluent Welsh speakers, depending on the level of the qualification.
- 7.10 Figure 29 shows that there is no clear trend in the number or share of Welsh speakers starting childcare and playwork qualifications over time, with an average of around 30 per cent of learners being either fluent or non-fluent Welsh speakers in any given year.

**Figure 28: Share and number of qualifications started by level of Welsh language ability of learners, by level of qualification (for qualifications started between calendar years 2018 and 2022)**



Source: LLWR data (counts rounded to the nearest 10)

**Figure 29: Share and number of qualifications started by level of Welsh language ability of learners, by year (for qualifications started between calendar years 2018 and 2022)**



Source: LLWR data (counts rounded to the nearest 10)

7.11 Table 2 highlights the variation in the number of childcare and playwork qualifications undertaken across each of the 22 local authorities in Wales (based on where learners were taught), highlighting a trend toward more concentration in urban and more populated local authority areas, and some variation in the average completion rates across local authorities.



**Table 9: Number of qualifications started, by local authority where learner was taught and qualification level (for qualifications started between calendar years 2018 and 2022)**

	Level 2	Level 3	Level 4	Level 5	Total	Average completion rate
Cardiff	1,530	1,050	100	310	3,000	42%
Carmarthenshire	720	1,080	50	240	2,080	43%
Newport	820	760	80	260	1,940	45%
Rhondda Cynon Taf	510	690	90	390	1,680	40%
Swansea	430	660	50	220	1,370	37%
Caerphilly	500	600	50	210	1,370	44%
Torfaen	640	530	60	100	1,330	45%
Bridgend	440	650	40	180	1,320	51%
Blaenau Gwent	470	480	50	70	1,070	51%
Monmouthshire	450	350	30	100	930	42%
The Vale of Glamorgan	310	330	50	150	840	38%
Gwynedd	320	370	60	70	830	40%
Neath Port Talbot	250	350	60	150	800	38%
Powys	210	240	50	70	570	42%
Pembrokeshire	210	280	<10	60	560	52%
Isle of Anglesey	250	210	20	70	540	40%
Wrexham	110	170	<10	50	340	49%
Denbighshire	130	150	<10	30	330	41%
Merthyr Tydfil	60	140	20	100	320	36%
Flintshire	90	150	10	50	310	52%
Conwy	110	140	10	20	280	40%
Ceredigion	40	110	<10	40	190	55%

Source: LLWR data (counts rounded to the nearest 10)

7.12 It is worth noting that data limitations meant that analysis of LLWR data could not provide insight into all the research questions of interest. A very large number of missing records meant that it was not possible to accurately determine the share of learners currently employed in the childcare and playwork sector.

## 8. Conclusions

- 8.1 Our research looked into the current and future state of the childcare and playwork workforce, by conducting fieldwork with members of the workforce and undertaking analysis and modelling to understand the future demands of the workforce resulting from expected policy changes.
- 8.2 The findings from this research suggest potential challenges in being able to meet the increased demand for childcare and play workers, largely stemming from the expansion of Flying Start. Workforce members reported prominent recruitment and retention challenges, with almost 70 per cent of respondents reporting at least one vacancy in their settings, leading to negative impacts on children and increased pressure on colleagues. A considerable share of respondents are contemplating leaving the sector within the next 12 months, citing pay and remuneration.
- 8.3 The issue of inadequate pay is a central theme, with many feeling the responsibilities of their work are not adequately reflected in their compensation. The low pay, coupled with demanding job responsibilities, is perceived to be a key factor in the high turnover rates. Pay is also identified as a major obstacle to both retaining and recruiting staff, particularly for those with Welsh language skills.
- 8.4 Issues with ensuring that staff are adequately qualified are also noted, particularly in ensuring that students have the necessary skills from their courses. To encourage existing staff to train for further qualifications, fully funded qualifications and additional pay are proposed as a potential solution to motivate and enable individuals to join the workforce.
- 8.5 The use of Welsh in everyday work varies among respondents, but setting managers expressed challenges in recruiting Welsh-speaking staff due to insufficient pay compared to other sectors. Difficulties in recruitment and retention of Welsh-speaking staff were viewed as a key barrier to achieving Welsh-medium provision targets.
- 8.6 The analysis also highlights difficulties in being able to recruit and maintain a diverse workforce, with managers citing a lack of staff from minority ethnic backgrounds. It was also noted that staff from diverse backgrounds are rarely in managerial roles. As demonstrated in the projection analysis which models the future demand for childcare places and workers over the next five years, potential challenges in

recruitment and retention could be a barrier to meeting the additional demand resulting from the expansion of Flying Start. However, it is noted that there is uncertainty with this analysis relating to the take-up of Flying Start and the extent to which this displaces demand in other care settings.

- 8.7 Despite these challenges, workforce members highlighted the rewarding nature of working in the childcare and play sector, with it playing an important role in the development and well-being of children.

## **Annex A: Interview topic guide for setting managers and practitioners**

### **Introduction**

1. To get started, can you describe in just a few words your role and your day-to-day activities in the childcare and play sector?

2. What type of setting do you work in?

Prompt: What local authority do you work in?

Prompt: What language does your setting provide its services in?

Prompt: What age groups does your setting provide services for?

Prompt: Did you previously work in other setting types?

Prompt: Do you hold any secondary positions (eg. in other settings or outside the sector)?

### **Personal experience working in the sector**

3. What are your views on how the childcare and play sector is doing at the moment?

Prompt: What do you think the sector is doing well?

Prompt: Where do you see there might be opportunities?

Prompt: What do you think the state of the sector will be in five years' time?

Prompt: What are the main concerns or pressures facing the sector's workforce?

Prompt: What challenges are you experiencing in your everyday work?

Prompt: Do you have any ideas or suggestions that could improve any of the issues you've raised?

4. Have you undertaken a childcare or playwork qualification (anything between Level 2 up to Level 5) in the last four years?

Prompt: Why did you undertake the [above] qualification and how did you find the process?

Prompt: Have you been able to complete any training in the language of your choice?

5. Are you considering obtaining any additional qualifications? Why (not)?
6. How would you describe your Welsh language skills and how do you use your skills in your job?

Prompt: How confident are you to use your Welsh language skills? Is there anything that could increase your confidence?

7. How well do you feel the pay and benefits you receive reflect your skills, qualifications and day-to-day responsibilities at work? Please do not feel obliged to share any personal information and you are free to skip any question.

Prompt: Does your setting have pay scales or graduation of pay?

Prompt: To what extent is pay affected by length of service or your qualification level?

Prompt: Does your setting provide any other benefits?

8. How do you see your future in the sector? Please note your name and response will not be shared with anyone.

Prompt: Do you see yourself working in the sector in 12 months' time?

Prompt: Do you see yourself moving or progressing into a new opportunity within the sector?

### **Managers only: Experience running a setting**

9. This next set of questions is about recruitment and retention of staff – do you currently employ anyone at your childcare setting?

- a. Would you consider recruiting a childminding assistant? Why or why not?

10. Can you describe how recruitment for new staff has been over the past 12 months?

Prompt: Have you been able to recruit a sufficient number of qualified staff? (e.g. Level 3)

Prompt: How easy or difficult is it to recruit Welsh-speaking staff?

Prompt: Have you experienced any other challenges during recruitment?

Prompt: Have you done anything to boost recruitment in your setting?

11. What has your experience with staff retention been in the past 12 months?

Prompt: How do you seek to motivate staff to stay in their posts?

Prompt: Why do you think staff leave their posts and where do they go?

12. How does your setting approach the recruitment of a diverse range of staff in terms of characteristics such as ethnic background, gender and disability?

Prompt: If No, are there any obstacles to implementing this?

13. How is your setting currently funded and how do these funding sources affect the running of your setting?

Prompt: Do you receive funds either through fees paid by parents, funded places through the Childcare Offer or Flying Start, or other sources?

Prompt: Do you have any ideas or solutions to the issues you've raised?

14. Care Inspectorate Wales requests annual submissions of Self-Assessment of Service Statement (SASS) from your setting, which includes information about the Welsh language ability of your staff. How do you find out about and keep track of the Welsh language ability of your staff?

### **Debrief**

15. Are there any other issues that you would like to discuss that we have not asked you about?

## **Annex B: Focus group topic guide for setting managers and practitioners**

### **Practitioners Focus Group**

#### *Warm-up*

1. Can you briefly introduce yourself by telling us your names and why you've come to today's discussion.

Prompt: Could you describe your role in the childcare and play sector?

Prompt: What type of setting do you work in? How long have you worked there?

Prompt: What local authority do you work in?

Prompt: What language does your setting provide its services in?

Prompt: What age groups does your setting provide services for?

#### **Personal experience working in the sector (60 minutes)**

2. How would you say the childcare and play sector is doing at the moment?

Prompt: What do you think the sector is doing well?

Prompt: Where do you see there might be opportunities?

Prompt: What do you think the state of the sector will be in five years' time?

Prompt: What are the main concerns or pressures facing the sector's workforce?

Prompt: What challenges are you experiencing in your everyday work?

Prompt: Do you have any ideas or suggestions that could improve any of the issues you've raised?

3. Has anyone here undertaken a childcare or playwork qualification in the last four years? (anything between Level 2 up to Level 5)

Prompt: Which qualification(s) did you undertake specifically?

Prompt: Why did you undertake this qualification and how did you find the process?

Prompt: Are you considering obtaining any additional qualifications?

Prompt: Any reason why not undertaken one?

4. How would you describe your Welsh language skills and how confident are you to use your Welsh language skills at work?

Prompt: Is there anything that could increase your confidence?

5. How well do you feel the pay and benefits in the childcare and play sector reflect the skills, qualifications and day-to-day responsibilities of childcare and play practitioners? Please do not feel obliged to share any personal information.

#### *Debrief*

6. Are there any other issues that you would like to discuss?

We have now reached the end of our Focus Group. Thank you for taking the time to speak with us today.

### **Managers Focus Group**

#### *Warm-up*

1. Can you briefly introduce yourself by telling us your names and why you've come to today's discussion.

Prompt: Could you describe your role in the childcare and play sector?

Prompt: What type of setting do you work in? How long have you worked there?

Prompt: What local authority do you work in?

Prompt: What language does your setting provide its services in?

Prompt: What age groups does your setting provide services for?

### **Personal experience working in the sector**

2. How would you say the childcare and play sector is doing at the moment? Why?

Prompt: What do you think the sector is doing well?

Prompt: Where do you see there might be opportunities?

Prompt: What do you think the state of the sector will be in five years' time?

Prompt: What are the main concerns or pressures facing the sector's workforce?

Prompt: What challenges are you experiencing in your everyday work?

Prompt: Do you have any ideas or suggestions that could improve any of the issues you've raised?



3. Has anyone here undertaken a childcare or playwork qualification in the last four years? (anything between Level 2 up to Level 5)

Prompt: Which qualification(s) did you undertake specifically?

Prompt: Why did you undertake this qualification and how did you find the process?

Prompt: Are you considering obtaining any additional qualifications?

Prompt: Any reason why not undertaken one?

### **Experience running a setting**

4. How has recruitment for new staff been over the past 12 months?

Prompt: Have you been able to recruit a sufficient number of qualified staff? (e.g. Level 3)

Prompt: How easy or difficult is it to recruit Welsh-speaking staff?

Prompt: Have you experienced any other challenges during recruitment?

Prompt: Have you done anything to boost recruitment in your setting?

Prompt: How does your setting approach the recruitment of a diverse range of staff in terms of characteristics such as ethnic background, gender and disability? If No, are there any obstacles to implementing this?

5. What has your experience with staff retention been in the past 12 months?

Prompt: How do you seek to motivate staff to stay in their posts?

Prompt: Why do you think staff leave their posts and where do they go?

6. How is your setting currently funded and how do these funding sources affect the running of your setting?

Prompt: Do you receive funds either through fees paid by parents, funded places through the Childcare Offer or Flying Start, or other sources?

Prompt: Do you have any ideas or solutions to the issues that have been raised by the group?

### **Debrief**

7. Are there any other issues that you would like to discuss?

## **Annex C: Survey questionnaire**

### **Childcare and Playwork - Practitioner Survey**

#### *General provision*

1. What is your personal role in your setting?

*Please answer based on your primary place of work. If you are a childminder without additional staff, please select "Childcare practitioner".*

- Setting manager
- Childcare practitioner
- Playwork practitioner
- Other

2. What category of provider do you work for?

*Please answer based on your primary place of work.*

- Third sector provider
- Local authority provider
- Private sector provider
- Other

3. Which type of setting do you work in?

*Please answer based on your primary place of work.*

- Child minding
- Creche
- Full day care
- Open access play provision
- Out of school care
- Sessional day care
- Other

4. In which local authority is your setting located?

*If the setting you work in provides services in multiple areas, please select the local authority you are personally working in or managing most of the time.*

- Blaenau Gwent
- Bridgend
- Caerphilly
- Cardiff
- Carmarthenshire
- Ceredigion
- Conwy
- Denbighshire
- Flintshire
- Gwynedd
- Isle of Anglesey
- Merthyr Tydfil
- Monmouthshire
- Neath Port Talbot
- Newport
- Pembrokeshire
- Powys
- Rhondda Cynon Taf
- Swansea
- Torfaen
- Vale of Glamorgan
- Wrexham

5. Which age groups can access your setting's services?

*Tick all that apply.*

- Children under the age of 1
  - 1-year-olds
  - 2-year-olds
  - Aged 3-4 years
  - Aged 5-12 years
  - Other
6. What is the main language through which your setting provides its services?
- Welsh
  - English
  - Bilingual
7. Do you hold any additional position aside from your primary work?
- Yes, also in the childcare and playwork sector
  - Yes, in a different sector
  - No
  - Prefer not to say
8. What setting type do you work in for your secondary position?
- Childcare (including full and sessional day care, creches)
  - Childminding
  - Playwork and Out of School Clubs
  - Youth work
  - Other

*About you*

9. How would you describe your gender identity?
10. What is your age?
- Age 16-25
  - Age 26-35

- Age 36-45
- Age 46-55
- Age 56-65
- Age 66+

11. How would you describe your Welsh language skills?

- Fluent in Welsh
- Speak a fair amount of Welsh
- Speak little or no Welsh

12. How often do you use your Welsh skills at work as a childcare or play practitioner?

- Daily
- Several times a week
- Several times a month
- Once a month
- Several times a year
- Less than once a year or never

13. Which pay band does your salary fall into?

*We are referring to your primary occupation here only.*

- £10.91 or more per hour (above Real Living Wage)
- £10.90 per hour (Real Living Wage)
- £10.42 per hour or above (National Living Wage, age 23+)
- £10.18 per hour or above (National Minimum Wage, age 21-22)
- £7.49 per hour or above (National minimum Wage, age 18-20)
- Below National Minimum Wage or National Living Wage for my age
- Prefer not to say
- Other

14. What is your sex?

*A question about gender identity will follow.*

- Female
- Male
- Prefer not to say

15. Is the gender you identify with the same as your sex registered at birth?

*This question is voluntary.*

- Yes
- No
- Prefer not to say

16. What is your ethnic group?

*Groups are defined following classification by the latest UK census.*

- White
- Mixed or multiple ethnic groups
- Asian, Asian Welsh, or Asian British
- Black, Black Welsh, Black British, Caribbean or African
- Other ethnic group
- Prefer not to say

17. White - please specify.

- Welsh, English, Scottish, Northern Irish or British
- Irish
- Gypsy or Irish Traveller
- Roma
- Other

18. Mixed or Multiple ethnic groups - please specify.

- White and Black Caribbean

- White and Black African
- White and Asian
- Other

19. Asian, Asian Welsh or Asian British - please specify.

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Other

20. Black, Black Welsh, Black British, Caribbean or African - please specify.

- Caribbean
- African background
- Other

21. Other ethnic group - please specify.

- Arab
- Other

22. Do you have any physical or mental health conditions or illnesses lasting or expected to last 12 months or more?

- Yes
- No
- Prefer not to say

23. Do any of your conditions or illnesses reduce your ability to carry out day-to-day activities?

- Yes, a lot
- Yes, a little
- Not at all
- Prefer not to say

## Qualifications

24. What is the highest qualification you hold?

	Level 2	Level 3	Level 4	Level 5	Other	None
Childcare						
Playwork						

25. Are you currently studying for any additional qualification in childcare or playwork or are you intending on studying for a qualification in the next 12 months?

- Yes, childcare qualification
- Yes, playwork qualification
- Undecided
- None
- Other

26. What qualification level are you currently studying or intend to study for?

- Level 2
- Level 3
- Level 4
- Level 5
- Other

## Personal work satisfaction in the sector

27. How content are you personally with your current work in the sector?

- Highly dissatisfied
- Dissatisfied
- Neutral
- Satisfied
- Highly satisfied

28. Why are you personally dissatisfied with your current work in the sector?



*Tick all that apply.*

- Feelings of pressure and responsibility
- Pay and remuneration
- Work-life balance
- Lack of progression opportunities
- Insufficient guidance or support from managers
- Qualifications for progression difficult to achieve
- Experience of discrimination, harassment, and/or bullying at work
- Other

29. Do you expect any challenges from current or future childcare and play policy to affect your role in the sector?

*For example, this could include the Childcare Offer for Wales or the Flying Start expansion, among others.*

30. In the next 12 months, are you considering one of the following?

- Leaving the sector
- Move to a different childcare or play setting
- Take up a second job
- Seek a promotion
- Retiring
- None of these options
- Other

31. What is the **main reason** you are considering leaving the sector?

- Feelings of pressure and responsibility
- Pay and remuneration
- Work-life balance
- Lack of progression opportunities
- Qualifications for progression difficult to achieve

- Experience of discrimination, harassment, and/or bullying at work
- Other

### **Workforce characteristics in your setting**

32. How many **full-time staff** members does your setting employ?

33. Only include staff members who interact with children as part of their role. Other staff such as administrative or cleaning staff should be excluded.

34. How many **part-time staff** members does your setting employ? Only include staff members who interact with children as part of their role. Other staff such as administrative or cleaning staff should be excluded.

35. Do you undertake any equal opportunities monitoring?

*E.g., data on the numbers of male/female staff in your setting etc.*

- Yes
- No

36. According to your Equal Opportunities data, how many of your staff are women?

*Skip question if unknown.*

37. According to your Equal Opportunities data, how many of your staff are men?

*Skip question if unknown.*

38. According to your Equal Opportunities data, how many of your staff identify another way (e.g., non-binary, prefer not to say, other)?

*Skip question if unknown.*

39. According to your Equal Opportunities data, how many of your staff are of Black, Asian or Minority Ethnic background?

*Skip question if unknown.*

40. According to your Equal Opportunities data, how many of your staff are disabled?

*Skip question if unknown.*

41. Do you collect information on your staff's Welsh language ability?

- Yes
- No

42. How many of your staff are fluent in Welsh?

43. How many of your staff speak a fair bit of Welsh?

44. How many of your staff use their Welsh language skills in their everyday work?

### **Structures and challenges in the sector**

45. How many vacancies do you **currently** have?

*Please count the number of full-time positions (e.g. count two 50% positions as "1")*

46. How many vacancies have you had in **the past 12 months?**

*Please count the number of full-time positions (e.g. count two 50% positions as "1")*

47. How many staff have left your setting in the past 24 months?

*This should include staff switching to other settings, other sectors, or leaving work entirely (e.g. retirement).*

48. In your experience, are any of the following a barrier to recruitment and/or retention in childcare and play?

- Hours of work (too long)
- Hours of work (too short)
- Pay
- Qualification requirements (too high)
- Competition from other sectors
- Other

49. Could you please briefly outline any other problems you face when recruiting staff for your setting in **general**.

50. Do you experience any additional challenges when recruiting Welsh-speaking staff?

Does not apply (No problems or challenges)

Does not apply (English-medium provision only)

Yes

51. Could you please briefly outline the problems you face in your setting when recruiting **Welsh-speaking staff**.

52. Do you conduct any equal opportunities monitoring for applicants to your setting?

- Yes
- No

53. What share of applicants to positions have been from practitioners of a Black, Asian or minority ethnic background in the past 24 months?

*Please indicate in %.*

## Annex D: Modelling assumptions

### General assumptions

The following table outlines key policy parameters users can select within the model, and what the parameter edits within the projections.

Assumption	Options	Description
<b>Child to place ratio used for workforce calculations</b>	<ul style="list-style-type: none"> <li>• Historic (children on books basis), ranging from an estimated 3 to 18 places per child depending on the setting type.</li> <li>• Ideal, based on National Minimum Standards, ranging from an estimated 4 to 13 places per child depending on the setting type.</li> </ul>	<p>The model uses projections of demand for childcare places to project workforce demands using a child to place ratio. This parameter allows the user to select whether this ratio is based on historical data on child per place in Wales (Historic) or a ratio based on the National Minimum Standards for child to staff ratios (Ideal).</p> <p>The workforce projections will change depending on which option the user selects.</p>
<b>Childcare and playwork vacancies filled</b>	<ul style="list-style-type: none"> <li>• All vacant posts filled</li> <li>• Vacancy rate in line with all sectors</li> <li>• No change in vacancies</li> </ul>	<p>Users have three options to model staff vacancies in the childcare and play sector. If “all vacant posts filled” is selected, the model will assume that all currently vacant posts will be filled within the projections. The second option will align the vacancy rate for childcare and play staff with the estimated vacancy rate across all sectors. No change in vacancies assumes that the current vacancy rate remains the same across the projections.</p>
<b>Waiting lists included within projected demand (places)</b>	<ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>	<p>Selecting yes or no changes whether or not projected demand includes current waiting lists for childcare demand. Waiting lists are estimated based on analysis of 2023 SASS data</p>

Assumption	Options	Description
		and estimates taken from <a href="#">Retention and Return: Delivering the expansion of early years entitlement in England.</a>

### User assumptions

The following table lists other user assumptions that can be changed by users, as well as the source used to inform the assumptions. These assumptions are quantitative and underpin the projections of demand and workforce implications. The general assumptions tab also includes cells that are calculations based on the assumptions inputted by the user, these are not listed and should not be changed.

Assumption/input	Value	Description	Data source
Self Assessment of Service Statement (SASS) response rate	91%	The estimated percentage of childcare providers who responded to the Self-Assessment of Service Statement (SASS) survey.	Care Inspectorate Wales (CIW) estimate
Number of individual staff current in the service (SASS 2023)	Based on setting type.	The number of staff working across each setting type, as reported in the SASS.	Alma Economics analysis of SASS (2023)
Number of individual staff current in the service (estimate 2023)	Based on setting type	The number of staff estimated to be working in each setting type, calculated based on SASS 2023 reporting and the response rate.	Calculation
Ideal child to place ratio	Based on setting type	The ideal child to place ratio is taken from the National Minimum	<a href="#">National Minimum Standards</a>

<b>Assumption/input</b>	<b>Value</b>	<b>Description</b>	<b>Data source</b>
		Standards, which sets out the minimum child-staff ratio in use for each setting type.	
Worker highest qualification (for each setting type)	Percentage, based on setting type	The percentage of staff who have obtained each level of qualification (e.g., Level 2, Level 3, Other) as their highest qualification, broken down by setting type.	Alma Economics analysis of SASS (2023)
Local authority distribution of places	Percentage, based on local authority and setting type	The percentage of places within each setting type that are within each local authority.	Alma Economics analysis of SASS (2023)
Total children in childcare by setting type and age group (SASS 2023)	Count of children, based on setting type	The total number of children registered (“on books”) within each type of childcare setting.	Alma Economics analysis of SASS (2023)
Total children in childcare (estimate 2023)	Count of children, based on setting type	The estimated number of children in each type of setting based on reports from the SASS, taking into account the response rate.	Alma Economics analysis of SASS (2023)
Distribution of children on the books by age group and setting type	Percentage, based on age group and setting type	The percentage of total children in a setting of each age group.	Alma Economics analysis of SASS (2023)

<b>Assumption/input</b>	<b>Value</b>	<b>Description</b>	<b>Data source</b>
Population projections by age group (indexed to 2023)	Percentage, based on age group and year	Population projection from 2024-2028 <sup>18</sup> , by age group indexed to 2023.	Alma estimates, based on 2020 national projections
No. of childcare and play roles currently vacant	Count of staff, based on setting type	The number of roles across each setting type that are currently vacant	Alma Economics analysis of SASS (2023)
Levels of frictional unemployment of all sectors	3%	Estimate of frictional unemployment, used as a benchmark for vacancy rates in the childcare sector.	Frictional unemployment derived from <a href="#">ONS employment data</a> (2023) for all UK sectors, calculated as the number of vacancies divided by the number of jobs.
No change in vacancies	Zero for all setting types	The vacancy rate within the childcare and play sector will remain consistent with the current vacancy rate.	This input should be set to zero.
Assumed waiting list per childminder	3	The estimated number of children waiting for a place for each childminder	Estimate taken from <a href="#">Retention and return: Delivering the expansion of early years entitlement in England</a>
Assumed average capacity to expand places	12%	Percentage representing the assumed increase in capacity for each childcare setting,	Estimate taken from <a href="#">Retention and return: Delivering the expansion of early</a>

<sup>18</sup> ONS population projections available via: [Population projections by year and age, 2020-based \(Welsh Government\)](#)



Assumption/input	Value	Description	Data source
		excluding childminders.	<a href="#">years entitlement in England</a>

## Welsh Language Assumptions

There are no key policy parameters related to Welsh Language Assumptions included in the model. All inputs and assumptions users can change are database assumptions.

### *User assumptions*

Assumption/input	Value	Description	Data source
Welsh language skills of staff	Percentage, based on setting type	The share of staff who are fluent in Welsh, can speak a fair amount of Welsh, and who can speak little or no Welsh, broken down by setting type.	Alma Economics analysis of SASS (2023)
Children by language through which service provided	Percentage, based on setting type	Share of children attending childcare where service is provided through Welsh, fully bilingual, English with some Welsh, or English only.	Alma Economics analysis of SASS (2023)
Local authority Welsh-medium provision targets	Percentage, based on year and local authority	Each local authority's target for early years education provided through the medium of Welsh, by local authority. Each local authority calculates	Local authority WESP Welsh-medium provision targets for early years education. <sup>19,20</sup>

<sup>19</sup> For background on WESP please refer to Welsh Government's Guidance on Welsh in Education Strategic Plans. See: [Guidance on Welsh in Education Strategic Plans \(Welsh Government\)](#)

<sup>20</sup> WESPs are developed and published by each Welsh local authority. See: [Welsh in Education Strategic Plans 2022 to 2032 \(Welsh Government\)](#)

		their targets on a different basis, and some information on some local authorities is not available.	
Share of children cared for in settings with Welsh-medium provision	Percentage, based on local authority	The share of children who are cared for in a setting that offers Welsh-medium provision.	SASS (2023)

### **Assumptions – expansion of the childcare element of Flying Start**

#### *Key policy parameters*

<b>Name of parameter</b>	<b>Options</b>	<b>What does this allow</b>
Expansion of childcare element of Flying Start implemented	<ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>	This allows the user to select whether or not the expansion of the childcare element of Flying Start is implemented within the model. If the expansion of the childcare element of Flying Start is implemented, there will be increased demand for childcare places.
Minimum qualification level for practitioners	<ul style="list-style-type: none"> <li>• Level 2</li> <li>• Level 3</li> <li>• Level 4</li> <li>• Level 5</li> </ul>	This switch allows the user to select the minimum qualification level for practitioners offering childcare as part of Flying Start. For example, if the user selects Level 4, only practitioners with a Level 4 qualification or higher will be able to offer Flying Start Places.

### Database assumptions

<b>Assumption/input</b>	<b>Value</b>	<b>Description</b>	<b>Data source</b>
Child population size <sup>21</sup>	Headcount, based on year	Number of children in each age group, projected until 2028.	Alma estimates, based on ONS 2020-based national projections
Share of child population offered places through Flying Start	Percentage	The share of the population of each age group eligible for places through Flying Start.	User input
Take-up percentage (proportion of those eligible taking up Flying Start)	87%	Assumed that 87 per cent of eligible children in each age group take up the Flying Start offer.	Assumptions for 2-year-olds based on 2022 take-up as reported by <a href="#">WG statistics for Flying Start</a> .
Displacement percentage (Percentage of those taking up FS2 who were already utilising self-funded childcare)	20%	Assumed that 20 per cent of children in each age group who are likely to take up Flying Start were already utilising self-funded childcare.	Alma Economics best estimate. This input can be updated by the Welsh Government should new data become available.
Assumed distribution of Flying Start places	Percentage	Assumed distribution of Flying Start places by setting type.	Alma Economics analysis of SASS (2023)

<sup>21</sup> ONS population projections available via: [Population projections by year and age, 2020-based \(Welsh Government\)](#)