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Mapping the Childcare and Play Workforce

Phase 1 report

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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

ARWAP	Anti-Racist Wales Action Plan
CIW	Care Inspectorate Wales
CSA	Childcare Sufficiency Assessment(s)
ECEC	Early Childhood Education and Care
GSR	Government Social Research
LFS	Labour Force Survey
LLWR	Lifelong Learning Wales Record
NDNA	National Day Nurseries Association
ONS	Office for National Statistics
PACEY	Professional Association for Childcare and Early Years Cymru
PLASC	Pupil Level Annual School Census
SASS	Self Assessment of Service Statement
SCW	Social Care Wales
SIC	Standard Industrial Classification
SOC	Standard Occupational Classification
WESP	Welsh in Education Strategic Plans

1. Introduction

Background

The Welsh Government has an ambition to provide good quality early childhood education and care to all children in Wales. In line with the refreshed Programme for Government, the Welsh Government is committed to ensuring the provision of high quality, affordable and accessible childcare for all families in Wales who require it and with a particular focus to strengthen Welsh-medium provision.¹ The Cymraeg 2050 strategy sets out a vision of ensuring a million Welsh speakers by 2050 and increasing Welsh-medium provision in early years childcare.² The Anti-Racist Wales Action Plan (ARWAP) sets out the Welsh Government's goals and actions to make the childcare and play sector in Wales anti-racist.³ In sum, the childcare and playwork workforce is viewed as key to delivering these commitments and supporting children to reach their full potential.

1.1 The 10 year Childcare Play and Early Years Workforce Plan, published in 2017, outlines the Welsh Government's ambition to develop a diverse, skilled workforce, highly regarded as a profession and a career of choice, and recognised for the vital role it plays in supporting children's development.⁴ The plan also highlights recruitment and retention challenges faced by the sector and sets out the actions responding to the need to invest in building capacity.

1.2 To support the Welsh Government's ambitions for the childcare and playwork sector, it is vital that an accurate picture of the size and make-up of the current childcare and playwork workforce is understood. Similarly, understanding the extent and nature of future demand for childcare and play service provision will be critical to ensuring that the sector can predict and meet future need.

Purpose of this report

1.3 Alma Economics has been commissioned by the Welsh Government to undertake a mapping of the childcare and playwork workforce in Wales which will include analysis of the current and future composition of the sector's workforce. The work seeks to allow policymakers to (i) better understand the make-up of the current

¹ Programme for government: update. See: [Programme for government: update | GOV.WALES](#)

² Cymraeg 2050: Welsh language strategy. See: [Cymraeg 2050: Welsh language strategy | GOV.WALES](#)

³ Anti-racist Wales Action Plan. See: [Anti-racist Wales Action Plan | GOV.WALES](#)

⁴ Childcare, play and early years workforce plan. See: [Childcare, play and early years workforce plan | GOV.WALES](#)

workforce, (ii) strengthen Welsh-medium provision, (iii) address the local needs of providers and support them with developing a comprehensive plan to increase capacity, and (iv) address concerns about lack of equal representation in the sector workforce.

- 1.4 This work has been divided into two phases. This report details the results of the first phase of work, which has identified and analysed existing data and evidence that can support the modelling and projections of the childcare and playwork sector which will be conducted in the second phase of work. Based on the findings from Phase 1 of this research, this report provides recommendations for Phase 2, which will include analysis of primary data collected from key industry stakeholders, and mapping and projections of the current and future childcare and playwork workforce.

Structure of this report

- 1.5 The remainder of this report is structured as follows:
- **Section 2** outlines the current policy landscape and briefly discusses strategic priorities in the childcare and play sector.
 - **Section 3** summarises the findings from the stakeholder interviews that were conducted to steer the direction of this project, as well as identifying and accessing key data sources.
 - **Section 4** details the outputs from the data review, identifying data and evidence to support the mapping and projections analysis to be conducted in Phase 2, highlighting any data gaps of significance.
 - **Section 5** provides key statistics and metrics for datasets that have been identified and accessed as part of the data review exercise.
 - **Section 6** concludes the findings of Phase 1, commenting on key data gaps.
 - **Section 7** provides recommendations for Phase 2, detailing the approach for the fieldwork activities and modelling specification.

2. Policy Overview

- 2.1 The following section outlines current policy priorities for the childcare and play sector in Wales. Recognising the importance of early childhood experiences, the Welsh Government has formulated a catalogue of policies, strategies, and programmes to promote high-quality childcare and play provision. This section aims to provide a brief overview of core programmes with an impact on the sector's workforce. However, it does not aim to discuss all relevant policies in full and instead aims to situate later findings from stakeholder engagement and data mapping in the policy context.
- 2.2 The Programme for Government⁵ and Children and Young People's Plan⁶ set out the Welsh Government's priority to enable all children to have the best start in life through excellent early years provision. The Welsh Government reaffirmed its commitment to expanding childcare and early years services to more families between 2021 and 2026 in Wales. Key commitments include expanding early years provision to all two-year-olds, broadening the Childcare Offer to parents in education and training, further investing into the Flying Start programme, and extending Welsh-medium provision to support reaching one million Welsh speakers by 2050 under Cymraeg 2050.
- 2.3 Childcare Offer for Wales:⁷ The Welsh Government's Childcare Offer for Wales provides eligible parents with up to 30 hours of childcare and early years education for three- and four-year-olds for up to 48 weeks per year. The Offer has been available across the whole of Wales since April 2019. It is delivered through a wide network of registered providers, including day nurseries, playgroups, and childminders, among others. The Welsh Government's investment in the Childcare Offer will see a notable increase from £75 million in 2021-2022 to £95 million annually by 2024-2025 according to the draft budget.⁸
- 2.4 Flying Start Provision:⁹ Flying Start is the Welsh Government's targeted Early Years programme for families with children under four years of age who live in some of the most disadvantaged areas of Wales. Flying Start aims to make a decisive difference to the life chances of children by mitigating the impact of poverty, which is linked to

⁵ Programme for Government. See: [Programme for government | GOV.WALES](#)

⁶ Children and Young People's Plan. See: [Children and young people's plan \[HTML\] | GOV.WALES](#)

⁷ Childcare Offer for Wales. See: [Childcare Offer for Wales | Help With Childcare Costs Wales | GOV.WALES](#)

⁸ Draft budget. See: [Draft Budget 2023 to 2024 | GOV.WALES](#)

⁹ Flying Start Provision. See: [Flying Start: health programme guidance | GOV.WALES](#)

poor life outcomes in early childhood, including health outcomes. The Programme comprises four elements: funded part-time, high-quality childcare for two to three-year-olds; enhanced health visitor support; access to parenting support; and support for speech, language, and communication development. The expansion of early years provision to all two-year-olds began in September 2022. The first phase of the expansion included all four elements of Flying Start and has been completed as of June 2023. The second phase, which focuses on the expansion of the childcare element of Flying Start, began in April 2023 and is currently ongoing, with plans to invest £11.65 million in 2023-24 and a further £14.3 million in 2024-25.

- 2.5 Cymraeg 2050:¹⁰ This long-term strategy seeks to expand the use of Welsh in early years childcare, ensuring that children can develop Welsh language skills early on, with the goal to achieve a million Welsh speakers by 2050. Cymraeg 2050 consists of several components strengthening the use of Welsh. Most importantly for children, Cymraeg 2050 provides an increasing number of Welsh-medium settings and supports practitioners to improve their own Welsh language skills. Following the Cymraeg 2050 goals, children under the age of five should be supported on their journey to Welsh fluency, starting with sufficient contact during early years.
- 2.6 Childcare, Play and Early Years Workforce Plan:¹¹ Recognising the crucial role of childcare practitioners and playworkers in achieving the Welsh Government's ambition, in 2017 a comprehensive 10-year strategy was announced. The plan focused on addressing the recruitment and retention challenges faced by the sector. This included (i) attracting high quality new recruits through promoting a career in childcare and making relevant career advice easily accessible, while also piloting the 'Childcare Works' programme, offering opportunities for short-term work experience for those wishing to start working in childcare; (ii) raising standards and skills through reviewing training and qualification standards, and introducing new qualifications for workers in the sector; and (iii) investing in capacity and capability development through policies such as introducing new apprenticeships.
- 2.7 National Minimum Standards:¹² Childcare and play settings in Wales are required to adhere to a comprehensive set of standards as part of the National Minimum

¹⁰ Cymraeg 2050. See: [Cymraeg 2050: Welsh language strategy action plan 2022 to 2023 \[HTML\] | GOV.WALES](#)

¹¹ Childcare, Play and Early Years Workforce Plan. See: [Childcare, play and early years workforce plan | GOV.WALES](#)

¹² National Minimum Standards Guidance. See: [National minimum standards and guidance: regulated childcare | GOV.WALES](#)

Standards¹³ applying to the sector. This includes registration requirements for a variety of settings, safeguarding rules, staffing ratios, qualifications and training necessary, as well as quality insurance and inspections.¹⁴

- 2.8 Progress for Success:¹⁵ The main purpose of this programme is to increase the quality of provision accessed within the early years, childcare and play sector by funding existing childcare and playwork practitioners to undertake recognised childcare and play qualifications. Between 2019 and 2023, Progress for Success funded pilot apprenticeship frameworks in Childcare Play Learning and Development (CCPLD) and Playwork to existing practitioners working between 10 and 16 hours per week across Wales.
- 2.9 Building A Brighter Future:¹⁶ Previously, the Early Years and Childcare Plan in 2013 highlighted the Welsh Government's commitment to supporting early years provision in order to provide the best possible start for a bright future for every child in Wales. Since then, the Welsh Government has taken significant steps towards improving the quantity and quality of early years and childcare provision, supporting Welsh-medium settings, fostering diversity in the workforce, and building capacity in the sector. In the 2017 Prosperity for All national strategy paper, early years provision had been set as one of the five main priorities of the Welsh Government.

¹³ National Minimum Standards. See: [National Minimum Standards for regulated childcare | GOV.WALES](#)

¹⁴ The consultation on the National Minimum Standards was still in progress while fieldwork for this report was undertaken. Stakeholder views are reported based on information shared at the time of the interview (March-April 2023).

¹⁵ Progress for Success. See: [Progress for Success | Business Wales Skills Gateway \(gov.wales\)](#)

¹⁶ Building a Brighter Future. See: [Building a Brighter Future: Early Years and Childcare Plan \(ioe.ac.uk\)](#)

3. Stakeholder engagement

Methodology

- 3.1 Stakeholder engagement was conducted in two phases, first with Welsh Government officials and subsequently with representatives of external stakeholders such as umbrella groups and other public bodies central to the childcare and playwork sector. In total, six interviews with eight Welsh Government officials were conducted. Additionally, nine interviews with fourteen external stakeholder representatives were conducted. Interviews were completed between March and May 2023 in both Welsh and English and all data collection was undertaken virtually. An overview of participating Welsh Government officials' areas of work as well as a list of participating external stakeholder organisations can be found in Annex A.
- 3.2 The scoping interviews followed a semi-structured approach covering the areas of childcare and play policy, current opportunities and challenges, existing and future data sources, as well as remit-specific discussions and space for discussing any additional aspects that participants thought were relevant for the research. The following section outlines emerging findings from the scoping interviews. Where not otherwise indicated, accounts and recommendations from Welsh Government officials and external stakeholders are discussed jointly.

Findings

Recent successes in the sector

- 3.3 Participants outlined their views that recent successes in the childcare and playwork sector had been achieved in further professionalising the sector, especially through consistent qualifications and formal requirements. The role of Social Care Wales (SCW) in this process was highlighted as helpful in developing the different levels of qualifications. Achieving a growing recognition for the importance of childcare and playwork as a policy area was furthermore highlighted as a success. Participants explained their view that particularly the Covid-19 pandemic led to increasing awareness around early years child development for which childcare and play are central. According to participants, a notable contributing factor to these positive developments was the formation of the Cwlwm partnership between five key stakeholder organisations (Clybiau Plant Cymru, Early Years Wales, Mudiad Meithrin, National Day Nurseries Association (NDNA) Cymru, and the Professional

Association for Childcare and Early Years (PACEY) Cymru). This partnership was understood as a valuable vehicle to advocate for the sector's needs and engage closely with the Welsh Government.

- 3.4 The sector's ability to cope with, and recover from, the Covid-19 pandemic was generally viewed as a major success, demonstrating the sector's resilience. Participants also explained that in the ongoing pandemic recovery phase, providing children with high-quality childcare and play settings was crucial for their social and cognitive development, and thus underscored the importance of upkeeping the sector's size and breadth. Respondents furthermore explained that the sector was currently able to cope with demand across setting types, but that available places or waiting lists may differ widely by setting.

Views on current policy priorities

- 3.5 During the scoping interviews, participants also discussed their views on current policy priorities with direct relevance to the sector's workforce. Accordingly, this section does not aim to provide a comprehensive overview of current policies, but instead focuses on stakeholders' views and priorities. Most frequently, the importance of a highly qualified workforce was outlined. Participants emphasised the crucial role of a professionalised workforce and argued that the introduction of the new qualification levels two to five since 2019 had been valuable. While qualifications needed to work in childcare are set by Social Care Wales,¹⁷ participants highlighted additional training provided or designed by other organisations as being useful, such as from Mudiad Meithrin. Valuable examples noted by participants were the *Camau* programme as well as further literature and bilingual resources for the early years workforce provided by Mudiad Meithrin. External stakeholders also noted that to undertake a certain qualification, staff would need to hold a position of at least 16 hours per week. However, some participants argued that this requirement may not be possible for some playworkers and therefore may inhibit their ability to obtain the relevant qualifications.¹⁸
- 3.6 Respondents saw a second area of focus in the expansion of Welsh-medium provision across setting types which was praised as being central to Welsh Government policy. External stakeholders felt it was important to offer flexibility for

¹⁷ Social Care Wales qualification framework: See: [Social Care Wales | Qualification framework for social care and regulated childcare in Wales](#)

¹⁸ This proposal formed part of a recent pilot. For details see 2.7 above.

settings to transition from English-medium to bilingual provision. Furthermore, offering additional training on relevant professional skills through the medium of Welsh and supporting Welsh speakers to use their skills confidently was emphasised as helpful during interviews. One key element identified as important for the successful Welsh-medium expansion is the Cymraeg 2050 long-term strategy. Mudiad Meithrin play a significant role in delivering the early years component of the strategic plan to promote Welsh language skills. Nevertheless, external stakeholders also outlined challenges with access to funding, particularly in non-Welsh speaking parts of Wales. Inconsistent funding structures across local authorities were perceived as challenging and a consistent approach was recommended in order to further support the increase in the Welsh-speaking population.

- 3.7 Another key policy area identified by participants was the provision and expansion of Flying Start. Overall, this was highlighted as a successful programme thus far, especially when allowing parents to access childcare who previously had been unable to afford this. Given that currently only families living in certain postcodes are eligible for Flying Start, participants stated that any expansion or universal application of the programme would notably impact the workforce. Participants argued that this would impact both the total level of demand as well as shape the types of qualifications necessary within settings. Interview participants perceived that the current lowest qualification is a level two, meanwhile noting that a level three is necessary to lead a setting. To deliver Flying Start, participants explained that staff would be required to hold a level three and level five respectively. However, external stakeholders fear that a Flying Start expansion would limit settings' choices of whether to provide such places; providing Flying Start may be the only viable choice to fill available places, since parents may otherwise choose alternative settings where their child's place would be provided under Flying Start. Nevertheless, external stakeholders caution that funding rates for Flying Start places may be lower than privately paid rates across local authorities, and often too low to cover the costs per place, resulting in a financial loss for the setting. Some participants suggested that the Childcare Offer for Wales, delivering an expanded provision of funded childcare of 30 hours for three- to four-year-olds, as well as the ECEC strategy for settings and schools, could provide a more suitable approach for the workforce and families.

3.8 A final area of policy frequently highlighted throughout scoping interviews was the importance of the Anti-Racist Wales Action Plan. While both internal and external stakeholders emphasised the importance of a more diverse workforce seeking to better represent the broader population, in practice, this was felt to be highly challenging, particularly with regards to recruitment. Respondents explained that very little data exists on diversity in the workforce, especially regarding protected characteristics of staff members.

Challenges facing the sector

3.9 Respondents extensively discussed challenges currently facing the sector and how this impacted service delivery on the ground. The most frequently discussed concern surrounded the financial costs of running a setting. Specific issues surrounded staff pay, increasing energy bills, and rising rent, meanwhile such costs could not be directly passed on to parents who may also struggle financially. External stakeholders emphasised that capital funding was currently sufficient. However, they also highlighted that, in their view, continuing insufficient revenue in the future constituted a concern for settings. It was further suggested that government funding per place was insufficient to cover costs and, given the sector's reliance on government funding, this would likely force providers to cut expenses elsewhere or exit the sector. Exempting childcare and playwork settings from business rates was highlighted as especially helpful.

3.10 Participants further expressed concerns over the viability of settings due to the rates paid per funded place (Flying Start and the Childcare Offer for Wales places), explaining such rates might be insufficient to cover the setting's expenses.¹⁹ Additionally, participants explain that parents may either be reluctant or unable to afford to pay top-up fees privately. The expansion of Flying Start was discussed in particular, and it was felt that smaller providers may be put at a further disadvantage by the tendering process through which the selection to become a Flying Start setting is made. Stakeholders felt that this could especially affect childminders, who were understood as currently not providing Flying Start services. Other aspects affecting childminders were described as the expansion of funded childcare to two-year-olds through Flying Start in the future, in addition to longer times at home for

¹⁹ Local authorities commission Flying Start childcare provision and determine the rates paid per funded place for Flying Start within their local area.

parents after a child is born. External stakeholders cautioned that this decreases the age range for which childminders can provide a suitable offer.

- 3.11 A second concern reported by participants was recruitment and retention challenges in both the childcare and playwork sectors. Precise requirements for qualifications were described as important yet also as a barrier to entry into the sector. Given the time necessary to obtain the qualifications for entry into the workforce as a qualified member of staff (cited as taking 18 months to complete), this reportedly results in delays to recruit qualified staff in what is already a “highly transient workforce” (quote from interview). Improving recruitment and retention were perceived as particularly challenging in relation to Welsh-speaking staff, especially in areas where less Welsh is spoken. One alternative proposal by stakeholders consists in “working towards qualifications” while already holding a position in a setting, rather than specifying the holding of a completed qualification as a prerequisite to count as a qualified member of staff.²⁰ According to participants, this eases some pressures on recruitment since staff members in the process of qualifying could be counted into the adult-child ratio.
- 3.12 Another factor leading to early exits from the workforce, according to participants, can be found in the lack of longer-term career prospects in the sector and low pay. External stakeholders reported that attempts are being made to facilitate the move between related sectors (such as schools and other child-related sectors) to reduce barriers to entry and attract additional staff. However, this may result in the opposite effect of more of the childcare and playwork workforce exiting the sector to work in adjacent sectors. Higher pay, less responsibility, few necessary qualifications, and comfortable working hours in other sectors such as retail may further motivate the workforce to leave the sector. Participants suggested to equalise pay in the childcare and playwork sector with statutory education settings to improve retention of the workforce.
- 3.13 As a third major concern, participants discussed changes in demand structures on the sector. Citing reasons such as the Covid-19 pandemic, altered work patterns and technology, as well as high costs of childcare, parents were seen as more likely to keep children at home for longer – both before entering any setting for the first

²⁰ A [consultation](#) on the National Minimum Standards considering this proposal has recently been undertaken. The refreshed [National Minimum Standards for regulated childcare](#) updated in May 2023 now allow for a proportion of staff who are working towards a qualification to be included in the staff qualification ratios. This is also the case for the Flying Start expansion.

time during early years, or by no longer using after-school clubs or other similar offers. Participants stressed that both play providers and childminders in particular had been affected by changes in the sector throughout recent years and that numbers of registered settings had declined substantially. Especially in rural areas, this decline may carry adverse consequences, given the low population density and lack of economies of scale for childcare and playwork provision. Participants emphasised that this may result in gaps of provision that disproportionately affect the rural population and contribute to socioeconomic marginalisation.

- 3.14 Participants also outlined their concerns over the sector's ability to cope if expanded or universal provision of funded childcare was to be introduced. External stakeholders cited estimates and experience from their members' settings which indicate that the sector is able to cope adequately with 50 to 60 per cent of eligible places being taken up. However, if a universal offer were to increase this take-up rate to 80 to 85 per cent, the workforce would likely struggle to cope, according to stakeholders interviewed.
- 3.15 The fourth most frequently discussed concern across both internal and external scoping interviews outlined the challenges associated with recruiting and encouraging a more diverse workforce – especially with regards to protected characteristics (e.g., gender, ethnicity, disability, religion, age).

Data sources

- 3.16 Participants were asked if they held, or were aware of, any data which would support this research. This could include for example data relating to their members or from surveys they have carried out. The following data sources were discussed, however, the process for gaining access to some data sources is still ongoing.
- **National Day Nurseries Association - NDNA:** Conducted a recent cost of living survey with settings; furthermore, NDNA gather data through an annual business survey.
 - **Play Wales:** Compiled a 2021 workforce survey and report.
 - **Clybiau Plant Cymru Kids' Club:** The organisation runs a club survey; this asks questions on issues such as vacancies or problems with recruitment. Moreover, they conduct a parent/ carer survey.
 - **Early Years Wales:** The organisation holds some data on its membership, their members' provision type and funding sources as well as gathering rough

indicators on pay. However, it is noted that different ways of counting membership numbers are applied as opposed to the CIW register.

- **Mudiad Meithrin:** The organisation monitors and reports on the number of children and staff in Welsh-medium early years settings. This includes audits of staff qualifications, language skills, and demographics of staff working with children below primary school age. This forms the basis of the *Grym ein gweithlu* report.²¹ Mudiad Meithrin further conducts an annual survey of membership and affiliated groups.
- **Social Care Wales - SCW:** The body holds some data on apprenticeship completion numbers for the childcare sector. Their remit does not span to the playwork sector. Qualifications are still in the process of transitioning since 2018; thus, limited data exists on either cohort of learners.
- **Professional Association for Childcare and Early Years - PACEY:** The organisation does not publish membership statistics and despite having conducted a previous annual survey, this has not been continued in recent years.
- **Care Inspectorate Wales – CIW:** In their role to register and inspect childcare and play services, CIW holds extensive data in the form of the official register. Furthermore, the Self-Assessment of Service Statement (SASS) constitutes a survey conducted by CIW with the most recent wave in 2023. For further details on the register and SASS data, see section 4 below.

3.17 Few participants were aware of any novel ongoing data collection (e.g., newly introduced surveys or data gathering), or reported plans to undertake any. A number of stakeholders were supportive of establishing an additional register of the workforce on top of the current registration of settings; however, concerns over added bureaucratic burdens were voiced.

Limitations to data sources

3.18 In addition to discussing the availability of data sources, the limitations and context to existing ones were discussed as part of the scoping interviews. This information will be used to develop the modelling approach and understand the uncertainties around the data it is based on.

²¹ Grym ein Gweithlu report: See: [Grym ein Gweithlu English \(meithrin.cymru\)](https://meithrin.cymru)

- 3.19 Most frequently, participants outlined potential limitations to the CIW register. Registration with CIW is compulsory for settings operating for at least two hours per day and thus provides a valuable source of information on the sector composition. However, settings operating for less than two hours, and thus especially playwork settings such as breakfast clubs, after-school clubs, or holiday playwork provision may be systematically underrepresented, according to participants. Other entries may be outdated or suspended. CIW reportedly undertook periods of checks on whether registered settings were still operational and in order to update the “service status” in the settings’ registration. This may limit the reliability of time-series of the total numbers of registered settings and when declines may have taken place.
- 3.20 Registration occurs at the setting level and thus offers no information on the staff composition or exact numbers within each setting - except in the case of childminders who must register separately, given that one person is often equivalent to one setting. Participants further emphasised potential problems with over- or under-counting of setting types, one example being settings counted as English-language despite offering bilingual provision. Place numbers may also not be accurate and should be understood as a maximum at any one time, according to participants. One example mentioned was a potential double counting of registrations for childminder couples. Participants explained that in some instances, both partners may be registered separately due to formal requirements yet care for the same group of children.²² Furthermore, difficulties with registration and paperwork may incentivise settings to operate in a way to avoid having to register which may influence the data on the composition of the sector provided. Participants furthermore report that the registration process may take between six to nine months which may affect the composition further.²³
- 3.21 With regards to the Self-Assessment of Service Statement (SASS) survey, participants emphasised the importance of this survey which has been conducted throughout multiple past waves and reportedly allows insights into the sector’s structure and setting-level characteristics. Participants indicated this as a highly valuable source of information, with the caveat that the response rate, though around 90 per cent for most waves, may systematically underrepresent certain settings. Furthermore, this survey is completed at the setting-level which may not

²² The participant mentioned the possibility to review data to estimate the prevalence of such double-counting.

²³ This research focuses on registered settings only. Stakeholder views on obstacles for registration are included in this report to reflect the complete discussions conducted during interviews.

capture individual details of staff working in respective settings accurately.

Participants also noted that only those registered with CIW are asked to respond to the SASS. A lack of input from the playwork sector is outlined as one possible consequence.²⁴

3.22 Participants noted that while external stakeholders' membership data could provide a valuable source, at current, this is limited given a lack of sharing such membership data within Cwlwm. Accordingly, this was viewed as a weakness in assessing policy impact and demands on the sector.

3.23 With regards to Welsh-language skills in the workforce, external stakeholders cautioned that Welsh-speaking staff may be counted multiple times due to parallel work in more than one setting. Furthermore, it is highlighted that linguistic abilities are reported by the setting manager in the SASS and may under- or over-estimate abilities.

Modelling priorities

3.24 Participants were asked for their recommendations for what should be included within the workforce projections for Phase 2 of this research, including policy scenarios that may potentially affect the demand for and composition of the workforce over the coming five years.

3.25 During internal scoping interviews with Welsh Government officials, the core priorities of the project were emphasised, particularly estimating the total size of the workforce, assessing its diversity, projections for numbers of qualified practitioners needed, Welsh language skills of staff, as well as geographical patterns of the distribution of the workforce across Wales. Other points flagged by participants for consideration in the modelling were considerations of recruitment and retention challenges and how this impacted settings.

3.26 External stakeholders also recommended a number of potential future policy scenarios for possible consideration in the upcoming modelling. Scenarios mentioned were an expansion of the funded Childcare Offer by differing age bands, the expansion of Flying Start, and further implementing the Cymraeg 2050 commitments. Other considerations voiced by participants were any changes in registration requirements (e.g. if rules of which setting types had to register or what

²⁴ Unregistered settings are outside the remit of this research.

requirements would have to be fulfilled for registration), and if qualifications required for respective staff positions were to change.

- 3.27 With regards to the fieldwork component of Phase 2, it was noted that approaches to training and qualifications as well as incentives for staying in the sector or reasons to leave it should be closely examined. Participants furthermore emphasised the importance of involving providers and individual workforce members more closely into the research.

4. Findings from the data review

- 4.1 The section provides a summary of existing data sources relating to the nature of childcare and play places available in registered settings, as well as the workforce employed in the sector. The data sources identified will be used to underpin the workforce projection model developed in Phase 2 of this research, as well as guiding the data that will be gathered during the survey and interviews/focus groups planned for Phase 2.
- 4.2 Sources of data were identified for review through the following channels:
- a list of known sources provided by the Welsh Government
 - sources identified or provided by stakeholders during the scoping interviews
 - a desk-based search, including data sources that have been used in previous research projects as well as using targeted keywords in search engines.
- 4.3 The information made available through each data source was mapped against the specified aspects of the childcare and playwork workforce which the Phase 2 projections will seek to provide insight into (see Annex C). The key characteristics and information contained within these databases are summarised in detail below, along with limitations where these can be identified.
- 4.4 The two most comprehensive sources of data on Wales's registered childcare and play settings and workforce are the CIW register and SASS data, also collected by CIW. A range of other data sources have also been reviewed, including (i) survey data captured within one-off industry publications, (ii) data captured within large-scale longitudinal datasets, and (iii) any data contained within local or national government strategies, action plans, and assessments.

Care Inspectorate for Wales (CIW) register database

- 4.5 CIW registers and inspects day care settings for children under 12 years of age, as required by the National Minimum Standards and Regulations. As part of this exercise, data is reported to CIW by registered providers. The returns provided to CIW provide data on a range of setting-level characteristics, with aggregated level statistics from CIW returns available on the StatsWales website.²⁵ The statistics of relevance include:

²⁵ StatsWales publication of CIW data on regulated care services and places. See: [Care services and places regulated by the Care Inspectorate Wales \(CIW\) \(gov.wales\)](https://gov.wales/care-services-and-places-regulated-by-the-care-inspectorate-wales)

- setting type
- location (local authority level)
- main language of operation, and level of Welsh-medium provision
- number of places (maximum)
- number of new registrations or cancellations.

4.6 It is understood that the number of childcare and play places reported by CIW is reflective of the maximum capacity of the register in terms of the maximum number of children that can be cared for in each setting at a single point in time. As such, this figure will not necessarily be equivalent to either the actual utilisation of the service or the total number of children on the books of a provider. A further limitation of data collected by CIW is that it only includes registered childcare and playwork providers, which will act to understate provision (based on stakeholder discussions, children's clubs and the playwork sector in particular are likely to be underrepresented as a result). The criteria for registration with CIW are summarised below.

Care Inspectorate for Wales registration requirements

4.7 Under the Children and Families (Wales) Measure 2010, any individual providing a childminding or day care service is required to register with CIW. The following services fall within the definition of childcare and play:

- full day care
- sessional day care
- out of school childcare
- creches
- open access play provision
- childminding.

4.8 There are a number of exceptions to the requirement for a service to be registered, including where care is provided for under two hours in any one day. Detailed guidance and definitions on registration requirements and exceptions are provided in CIW's Guide to Registration.²⁶

²⁶ CIW Guide to Registration. See: [Register a Childcare and Play Service | Care Inspectorate Wales](#)

Self-Assessment of Service Statement (SASS)

4.9 As part of their registration with CIW, and required under the Child Minding and Day Care (Wales) Regulations 2010, Responsible Individuals and Registered Persons are required to complete an annual SASS. The return collects detailed information on a range of factors including language use, operating hours, childcare session rates and staffing. Relevant to this work, the following data are collected through the SASS at the provider-level:

- Setting characteristics:
 - Setting type
 - Location (local authority or electoral ward level)
 - Language of operation
- Number of workers, by:
 - Qualification type
 - Employment type (full vs part time, zero-hours contracts)
 - Staff's ability to speak Welsh
 - Joiners or leavers, vacant posts

4.10 Similar to the CIW register database, a limitation of the SASS questionnaire is that it includes only registered providers (it is unclear how many unregistered providers there are). The survey also does not reflect all registered providers, given some providers did not respond, although it is understood that response rates are typically very high (the latest version reportedly achieved a response rate of around 90 per cent of registered providers). It should also be flagged that, as with any survey, the consistency and accuracy of the information provided is dependent on the quality of information reported by registered providers, which is not possible for us to verify. This limitation relates to both self-reported information on each registered provider and the information they report relating to their respective workforces (i.e., relating to workforce language capabilities and qualifications).

Other notable data sources

The Welsh Play Workforce Study (2021)

4.11 The Welsh Play Workforce Study²⁷ provides a one-off snapshot of the characteristics of the playwork workforce in Wales, with a view to feeding into the 2019-21 Welsh Government Ministerial Review of Play. The survey received 391 responses, including 211 playworkers, 90 Childcare and early years workers, and 90 other playwork professionals. Relevant to this data mapping exercise, the survey asked respondents to self-report on the following characteristics (amongst others):

- Welsh speaking skills
- gender
- ethnicity
- age
- location (by local authority)
- hourly pay
- qualification level.

4.12 A limitation of this study is that it is based on a limited sample of playworkers and so it is unclear to what extent the results are representative of the whole population of playworkers in Wales.

Early Years Survey (2022)

4.13 In 2022 Arad Research, commissioned by Early Years Wales, conducted an online playwork and childcare survey.²⁸ The survey received 362 responses, primarily from respondents identifying as registered childcare and play service providers, and local authorities. The survey asked respondents to report on a range of topics, including of relevance:

- the number of staff employed (by number of hours worked)
- the nature of staff contracts (i.e., permanent, temporary, zero hours)
- staff turnover (i.e., recruitment, vacancies, and leavers)
- average pay per hour (by seniority).

²⁷ The Welsh Play Workforce Study (Play Wales, 2021). See: [The Welsh Play Workforce Study 2021 by Play Wales - Issuu](#)

²⁸ Early Years Survey (Arad, 2022). See: [Reports | cwllwm](#)

4.14 A limitation of this study is that it is based on a limited sample of childcare and play service providers and so it is unclear to what extent the results are representative of the whole population of childcare and play providers in Wales.

Childcare sufficiency assessments (CSA)

4.15 As provided under section 26 of The Childcare Act 2006, through the Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016, local authorities in Wales are required to produce assessments of the sufficiency of childcare provision (Childcare Sufficiency Assessment) in their area every five years and to keep these under review.

4.16 Under the Welsh Government's supplementary guidance, local authorities are encouraged to draw on existing data sources to conclude on the sufficiency of service provision.²⁹ This guidance requests that local authorities consider annual population survey data, data from Dewis Cymru, and CIW's SASS. Local authorities are also encouraged to collect their own data in respect of registered and unregistered provision where needed (e.g., through a survey of parents, carers, or childcare providers).³⁰

NDNA 2018-19 Cymru Workforce Survey Wales

4.17 The NDNA 2018-19 Cymru Workforce Survey Wales collated and analysed data on the make-up, qualifications, motivations, and challenges of the workforce in nurseries and other childcare settings in Wales. One hundred and eighteen early years settings responded to the survey; combined these were responsible for employing over 1,350 staff delivering places to more than 8,000 children.

4.18 More specifically, the key data of relevance collected through the survey included:

- workforce qualification levels
- recruitment challenges faced by providers with respect to level of worker qualification
- vacancies in the workforce and staff turnover
- breakdown of the workforce by gender.

²⁹ Childcare Sufficiency Assessment (CSA) 2022: supplementary guidance for local authorities. See: [Childcare sufficiency assessment 2022: supplementary guidance for local authorities | GOV.WALES](#)

³⁰ Dewis Cymru is a portal of information about health, social care and wellbeing services and activities in Wales.

4.19 A limitation of this study is that it is based on a limited sample of childcare and play service providers and so it is unclear to what extent the results are representative of the whole population of childcare and play providers in Wales.

Pupil Level Annual School Census (PLASC)

4.20 PLASC is an electronic collection of pupil and school level data provided by all maintained sector primary, middle, secondary, nursery and special schools in January each year. It provides data on the demographic and socio-economic characteristics of pupils aged five to 15, and so represents a source of information with which to benchmark the characteristics of the workforce (i.e., understanding if the profile of the workforce aligned with that of the pupil population). It also collects a range of data points related to the Welsh language, including pupils by language medium of the school, pupils taught Welsh as a first language, and ability to speak Welsh (as assessed by parents).

4.21 Given a lack of other data on the demographics of children accessing childcare and play services, this dataset provides insight into the characteristics of the children utilising these services which can be used to assess whether the workforce is representative of the children and young people it is serving.

4.22 Data of relevance is collected through the survey and published via StatsWales, including a breakdown of pupils by:³¹

- gender
- eligibility for free school meals
- additional learning or special educational needs (i.e., School Action, School Action Plus, Statemented, Individual Development Plan)
- English as an additional language (i.e., New to English, early acquisition, developing competence)
- proportion of pupils reported as being Black, Asian, and minority ethnic.

Lifelong Learning Wales Record data

4.23 The data collected by the Welsh Government via the Lifelong Learning Wales Record (LLWR) underpins many aspects of its work, including the planning, funding,

³¹ StatsWales publication of PLASC data. See: [Pupil Level Annual School Census \(PLASC\) \(gov.wales\)](https://gov.wales/pupil-level-annual-school-census-plasc)

monitoring, and quality assurance of post-16 provision. The data also provides the official source of statistics on post-16 (non-higher education learners in Wales).

- 4.24 Based on the support manual for LLWR, there are potential variables of interest included within the database, including for each learner the level of the qualification, details on their employer (or if unemployed), and 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).³²
- 4.25 The value of the data source for understanding the qualification level of the childcare and playwork workforce will depend on the extent to which it will allow for linkage between individual learners and their involvement in the childcare and playwork workforce specifically (e.g., identified through their employer's SIC Code).³³ Further clarity on the value of this data source for understanding childcare and playwork service provision and its workforce will be provided during Phase 2, as at the time of writing access to the data has not yet been achieved.

National Survey for Wales

- 4.26 The National Survey for Wales is a large-scale random sample telephone survey collecting data from around 12,000 individuals in Wales each year on a range of different topics.³⁴ It has previously included specific questions on the childcare provided to the children of respondents, providing the following data of relevance to this work:
- whether child uses childcare
 - language childcare is provided in
 - use of formal childcare.
- 4.27 A limitation of the National Survey for Wales data is that the same questions are not generally repeated every year, with no questions on childcare provision having been asked since the 2019-20 version of the survey.³⁵ This limits the ability of

³² Lifelong Learning Wales Record user support manual for learning providers (XML) 2021/22. See: [Lifelong Learning Wales Record: user support manual 2022 to 2023 | GOV.WALES](#)

³³ Standard Industrial Classification (SIC) codes are four-digit numerical codes that categorise the industries that companies belong to based on their business activities. SIC codes are commonly used to segment data across industries by the ONS.

³⁴ National Survey for Wales. See: [National Survey for Wales | GOV.WALES](#)

³⁵ Childcare provision questions were included in the 2022-23 edition of the National Survey for Wales, although the data was not publicly available at the time of writing.

researchers to track changes in key data points over time. The survey also does not allow for a more granular analysis of the data with respect to the key dimensions of interest, such as by type of setting.

Labour force survey

4.28 The Labour Force Survey (LFS) is a study of the employment circumstances of the UK population and is the UK's largest household study. Based on responses to the survey, ONS produces a series of estimates for the size of the workforce in Wales based on occupation classifications (based on Standard Occupational Classification (SOC) 2020).³⁶ This data can be accessed through ONS's Nomis database of official census and labour market statistics.³⁷ Of relevance for this study are the following occupational classifications (noting that SOC codes have changed over time):

- early education and childcare assistants (SOC 2020: 6111)
- childminders (SOC 2020: 6114)
- nannies and au pairs (SOC 2020: 6116)
- playworkers (SOC 2020: 6117)

4.29 It should be noted that given the limited sample size, the confidence around estimates for more granular breakdowns of the workforce in Wales become less certain, particularly for workforce segments that are relatively small. For example, the 95 per cent confidence interval for early education and childcare assistants in Wales is 2,000 relative to a central estimate of 6,000 workers, whilst the confidence interval for the other listed occupations is either unreliable or cannot be estimated.³⁸ There are also concerns that LFS underestimates the Welsh childcare and playwork workforce, with estimates yielding from LFS historically being substantially lower than workforce estimates derived from SASS data. UK-level estimates of the workforce for relevant occupations appear to be more robust overall, although it is unclear how well these would generalise to the context of Wales.

³⁶ The Standard Occupational Classification (SOC) is a common classification of occupational information for the UK. SOC codes are frequently used by ONS to segment data in statistical publications.

³⁷ Nomis - Annual Population Survey/Labour Force Survey. See: [Annual Population Survey/Labour Force Survey - Data Sources - home - Nomis - Official Census and Labour Market Statistics \(nomisweb.co.uk\)](https://www.nomisweb.co.uk/)

³⁸ A confidence interval refers to the probability that a population parameter will fall between a set of values for a certain proportion of times. A 95 per cent confidence interval therefore implies that there is a 95 per cent probability that the true value falls within the specified range.

Welsh in Education Strategic Plans (WESPs)

- 4.30 The School Standards and Organisation (Wales) Act 2013 places a duty on all local authorities in Wales to consult on, produce, and review plans that provide the strategic direction for the planning and delivery of Welsh medium and Welsh language education in their locality.³⁹
- 4.31 The overarching aims of Cymraeg 2050 are to increase the number of Welsh Speakers to one million by 2050 and ensure the percentage of the population that speaks Welsh daily increases to 20 per cent by 2050.
- 4.32 Based on a sample of local authority WESPs that have been reviewed, relevant data can include the number of early years places available within each local authority, as well as ten-year targets for future Welsh-medium provision in early years education. It is not yet clear if this data is being aggregated to the national level in a centralised database.

Welsh in education workforce plan: data analysis

- 4.33 The Welsh in education workforce plan is accompanied by supplementary analysis providing data on the baseline and target number of primary and secondary teachers required to meet 2031 Welsh-medium education targets, including those teaching through the medium of Welsh and teaching Welsh as a subject.⁴⁰ This data source will be considered when projecting future Welsh-medium demand for services and workers in the childcare and play sector during Phase 2 of this project.

Review of the Childcare Sector in Wales

- 4.34 In 2017, Alma Economics, commissioned by the Welsh Government, conducted a one-off review of the formal childcare sector in Wales to inform proposed changes to childcare policy for three- to four-year-olds. The review analysed data from a range of databases – including SASS, CIW register, and Labour Force Survey data – as well as from the Alma Economics Childcare Survey, a survey of around 500 childcare and play providers. Relevant data presented within the report included estimates of the childcare workforce broken down by:
- qualification level
 - setting type

³⁹ Welsh in Education Strategic Plans (Guidance). See: [Welsh in Education Strategic Plans | GOV.WALES](#)

⁴⁰ Welsh in Education workforce plan. See: [Welsh in education workforce plan | GOV.WALES](#)

- age
- salary level.

4.35 A limitation of this study is that it is based on a limited sample of childcare and play service providers and so it is unclear to what extent the results are representative of the whole population of childcare and play providers in Wales. Compared with the surveys referenced above, the study is also relatively outdated having been conducted in 2017.

Projections and trajectory for the number of Welsh speakers

4.36 In 2017 the Welsh Government commissioned estimates of the trajectory required to reach the Welsh Government's 2050 target of a million Welsh speakers. This was coupled with projections for Welsh language speakers based on an extrapolation of current trends and patterns.⁴¹

4.37 A limitation of the projections is that they are based on a series of assumptions, including those informed by data from Census 2011 and population estimates from the early 2010s, which are likely to be outdated. It is understood that there are plans to update these projections using Census 2021 data.

⁴¹ Technical report: Projection and trajectory for the number of Welsh speakers aged three and over, 2011 to 2050. See: [Welsh speaker estimates 2011 to 2050: technical report | GOV.WALES](#)

5. Analysis of existing data

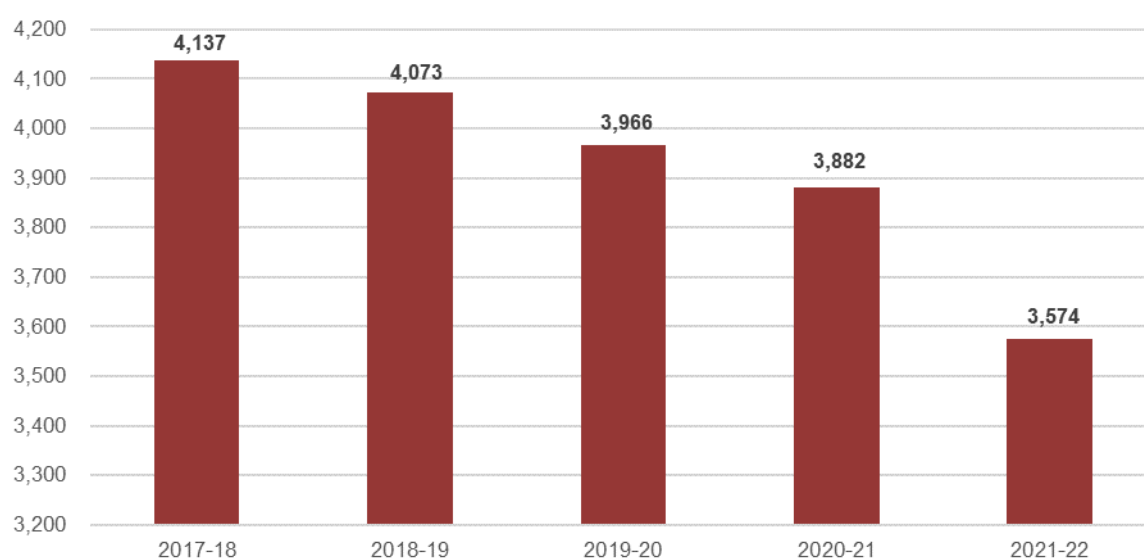
5.1 This section presents the key insights from the data sources reviewed during Phase 1 of the work, including data from the CIW register, SASS 2023, and other relevant sources.

5.2 The most robust, complete, and up-to-date sources have been prioritised when determining the statistics to be presented. It should be noted though that several of the data sources referenced still have limitations. Some are relatively out-of-date and so may not reflect the current situation for service providers or workers. Survey data also have natural limitations, including limited sample sizes which mean findings might not be representative of the full population of service providers.

Number and characteristics of childcare and play settings

5.3 The CIW register provides a comprehensive view of the number of registered childcare and play settings.⁴² As of 2021-22 there were 3,574 active or suspended registered childcare and play settings in Wales, down from 4,137 in 2017-18.⁴³

Figure 1: Number of childcare and play settings



Source: CIW register via StatsWales

Note: the figures above are point in time as at the end of each year ending March

5.4 The CIW register also provides a breakdown of these childcare and play settings by type. As of 2021-22 childminders accounted for the largest number of settings (1,686), followed by full day care (1,015) and sessional day care (463). The

⁴² Care services and places regulated by the Care Inspectorate Wales (CIW). See: [Care services and places regulated by the Care Inspectorate Wales \(CIW\) \(gov.wales\)](https://gov.wales/care-services-and-places-regulated-by-the-care-inspectorate-wales)

⁴³ All years presented in this format represent figures as at the end of each year ending March (e.g., 2022/23 represents the year ending March 2023).

remainder was made up of out of school care, open access play provision, and creches. The data shows there have been some changes in the distribution of settings across setting types, with full day care experiencing an increase in the number of settings since 2017-18, whilst all other setting types have experienced a fall in the number of settings in the same period.

Table 1: Number of childcare and play settings, by setting type

Setting type	2017-18	2018-19	2019-20	2020-21	2021-22
Childminders	2,201	2,131	2,025	1,931	1,686
Creches	27	26	20	17	14
Full day care	749	878	970	1,010	1,015
Open access play provision	50	45	41	40	38
Out of school care	415	390	385	385	358
Sessional day care	695	603	525	499	463
Total	4,137	4,073	3,966	3,882	3,574

Source: CIW register via StatsWales

Note: the figures above are point in time as at the end of each year ending March

5.5 The distribution of childcare settings by local authority as per CIW register data is provided shown in Table 2.

Table 2: Number of childcare settings, by local authority

Local authority	2017-18	2018-19	2019-20	2020-21	2021-22
Isle of Anglesey	115	115	116	115	102
Gwynedd	197	192	185	178	170
Conwy	150	156	160	159	152
Denbighshire	137	132	133	129	116
Flintshire	255	239	228	232	218
Wrexham	213	198	194	191	190
Powys	217	213	212	219	192
Ceredigion	129	133	124	115	107
Pembrokeshire	160	158	157	151	132
Carmarthenshire	240	255	251	254	238
Swansea	247	235	231	214	180
Neath Port Talbot	158	154	146	139	128
Bridgend	160	159	155	148	134
Vale of Glamorgan	237	236	221	223	203
Cardiff	471	461	456	445	418
Rhondda Cynon Taf	256	259	249	237	229
Merthyr Tydfil	45	48	51	47	41
Caerphilly	256	256	241	235	214
Blaenau Gwent	69	65	62	63	59

Torfaen	103	99	97	98	92
Monmouthshire	140	136	130	120	106
Newport	182	174	167	169	152
Total	4,137	4,073	3,966	3,882	3,574

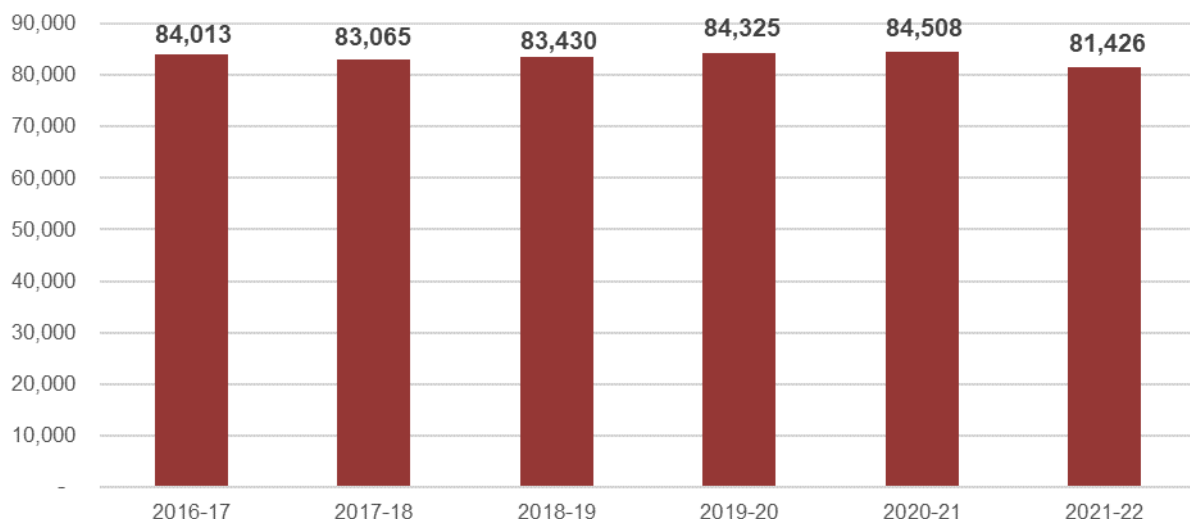
Source: CIW register via StatsWales

Note: the figures above are point in time as at the end of years ending March

Childcare provision (spaces)

- 5.6 The CIW register provides data on the maximum number of spaces that can be made available during a single childcare or play session by registered childcare and play providers. The data shows that total capacity has remained relatively consistent at 80,000 to 85,000 spaces between 2016-17 and 2021-22, with 81,426 spaces available as at 2021-22.

Figure 2: Total number of childcare and play spaces (maximum)



Source: CIW register via StatsWales

Note: the figures above are point in time as at the end of each year ending March

- 5.7 The CIW register also provides a breakdown of the number of spaces by setting type. As of 2021-22 full day care represented the largest number of places (39,412), followed by out of school care (14,723) and childminders (13,517). The remainder was made up of sessional day care, open access play provision, and creches. The data shows there have been some changes in the distribution of spaces across setting types, with full day care experiencing an increase in the number of spaces since 2017-18, whilst all other setting types have experienced a fall in the number of places in the same period.

Table 3: Number of spaces (maximum), by setting type

Setting type	2017-18	2018-19	2019-20	2020-21	2021-22
Childminders	16,184	16,113	15,694	15,132	13,517
Creches	657	636	546	457	406
Full day care	31,197	34,593	37,638	39,134	39,412
Open access play provision	3,534	3,111	3,025	2,960	2,931
Out of school care	15,909	15,366	15,656	15,484	14,723
Sessional day care	15,584	13,611	11,766	11,341	10,437
Total	83,065	83,430	84,325	84,508	81,426

Source: CIW register via StatsWales

Note: the figures above are point in time as at the end of each year ending March

5.8 The distribution of childcare places by local authorities as per CIW register data is provided below.

Table 4: Number of spaces (maximum), by local authority

Local authority	2017-18	2018-19	2019-20	2020-21	2021-22
Isle of Anglesey	2,109	2,128	2,146	2,182	2,068
Gwynedd	3,505	3,616	3,543	3,457	3,437
Conwy	3,875	3,861	3,938	3,891	3,820
Denbighshire	3,543	3,458	3,628	3,596	3,383
Flintshire	5,872	5,601	5,519	5,663	5,475
Wrexham	6,458	6,287	6,399	6,371	6,466
Powys	3,675	3,787	3,866	4,150	3,723
Ceredigion	2,038	2,092	2,008	1,985	1,758
Pembrokeshire	2,867	2,871	2,960	2,835	2,622
Carmarthenshire	4,367	4,667	4,635	4,788	4,531
Swansea	5,104	4,908	5,091	4,950	4,593
Neath Port Talbot	2,357	2,320	2,433	2,462	2,456
Bridgend	3,025	3,145	3,264	3,179	2,983
Vale of Glamorgan	3,739	3,915	3,956	4,252	4,025
Cardiff	9,845	9,787	10,338	10,147	9,918
Rhondda Cynon Taf	4,596	4,877	4,754	4,660	4,794
Merthyr Tydfil	919	985	972	921	842
Caerphilly	4,210	4,343	4,201	4,221	4,079
Blaenau Gwent	1,134	1,143	1,057	1,110	1,114
Torfaen	3,142	3,060	3,118	3,135	3,208
Monmouthshire	2,570	2,563	2,595	2,488	2,392
Newport	4,115	4,016	3,904	4,046	3,733
Total	83,065	83,430	84,325	84,508	81,426

Source: CIW register via StatsWales

Note: the figures above are point in time as at the end of each year ending March

Workforce characteristics

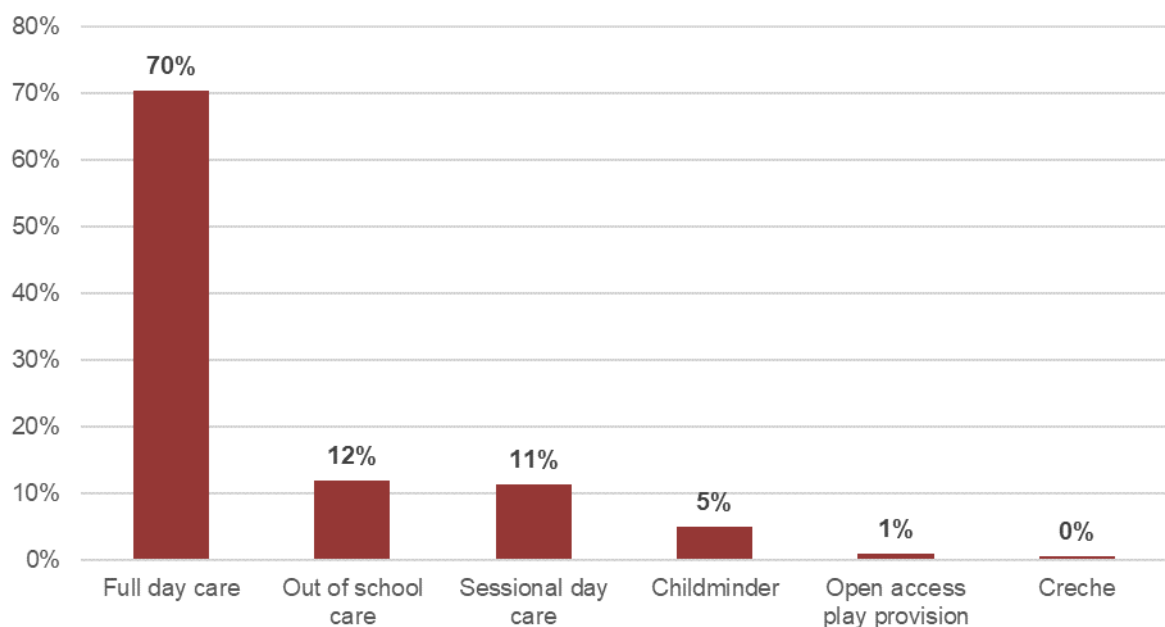
5.9 There is no comprehensive database of the demographic and socio-economic characteristics of the childcare and playwork workforce in Wales. Whilst the survey we will develop during Phase 2 will seek to provide insight into these areas, a series of existing one-off publications have provided some insight into the characteristics of various subsets of the workforce through their own surveys. A summary of the existing data by characteristic of interest is provided below.

Workforce by setting type

5.10 SASS 2023 provider-level data provides the most complete and reliable estimates of the size of the childcare and playwork workforce by setting type, as well as further breakdowns across key dimensions of interest.⁴⁴

5.11 The analysis shows that 15,107 staff were reported to be employed by registered childcare and play providers, based on a response rate of approximately 90 per cent of registered settings. By extrapolation this would indicate a total workforce of around 17,000 employed by registered childcare and play providers in Wales. The chart below shows that the majority (70 per cent) of these workers are employed by full day care settings.

Figure 3: Childcare and playwork workforce by registered setting type



Source: Analysis based on responses to SASS 2023, which achieved a c.90 per cent response rate across registered settings in Wales.

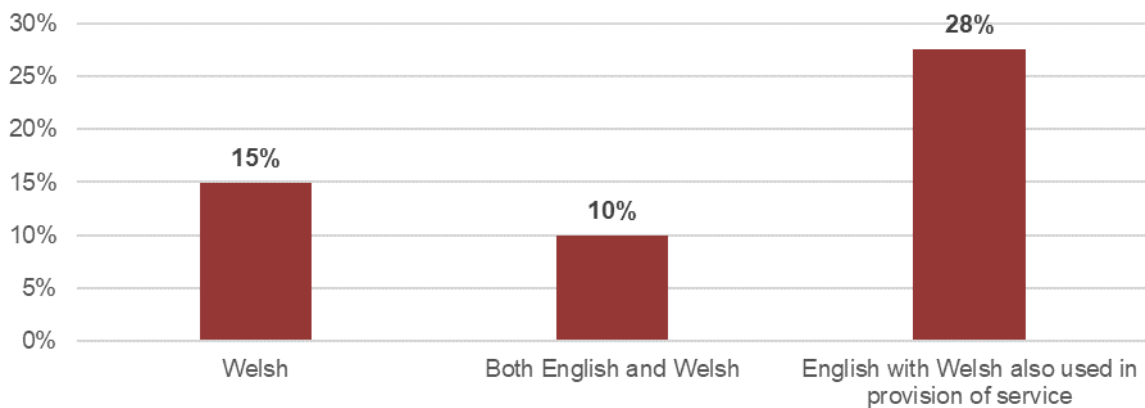
N=2,787 registered childcare and play settings

⁴⁴ It should be noted that 612 childminders responding to SASS 2023 reported having no individual staff working in their service. This discrepancy may act to understate the number of childminders operating in the sector and represented in this analysis of SASS 2023 data.

Welsh language skill level

- 5.12 SASS 2023 provided insight into the language provision of registered settings and the language skills of their respective workforces – this analysis is presented in the charts below.
- 5.13 Fifteen per cent of registered settings responding to SASS 2023 reported that Welsh was the main language through which their service was provided, with 10 per cent stating their main language as being in both English and Welsh.

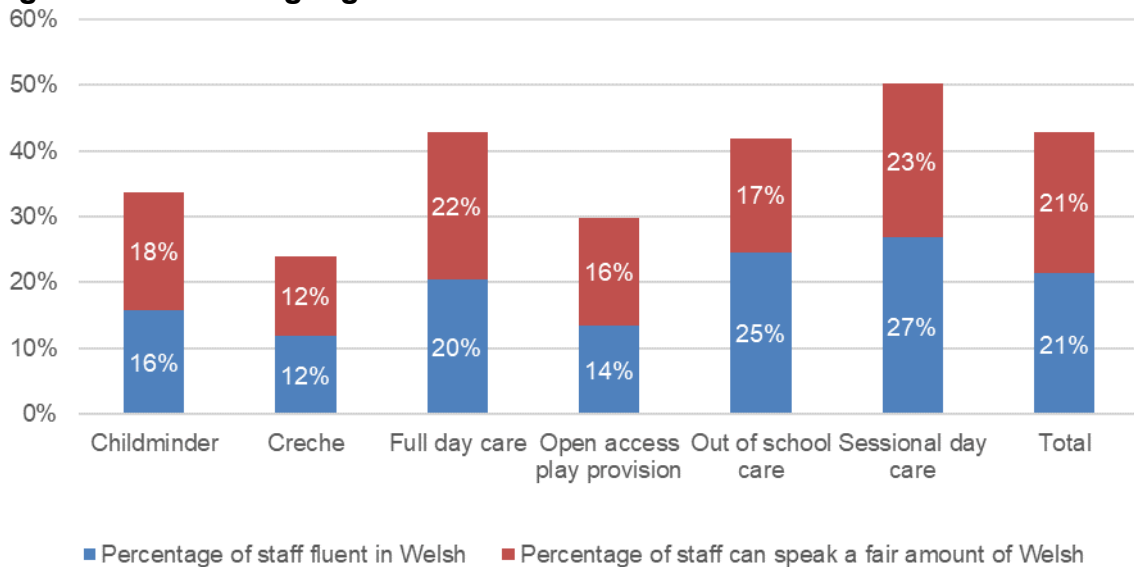
Figure 4: Main language through which setting service provided



Source: Analysis based on responses to SASS 2023, which achieved a c.90 per cent response rate across registered settings in Wales.
N=2,787 registered childcare and play settings

- 5.14 Overall, 21 per cent of the registered childcare and playwork workforce was reported as being fluent in Welsh, with a further 21 per cent reported as being able to speak a fair amount of Welsh. There was substantial variation in Welsh language skills across different setting types, ranging from 27 per cent of sessional day care workers being fluent in Welsh to 12 per cent of creche workers.

Figure 5: Welsh language skill level of staff



Source: Analysis based on responses to SASS 2023, which achieved a c.90 per cent response rate across registered settings in Wales.

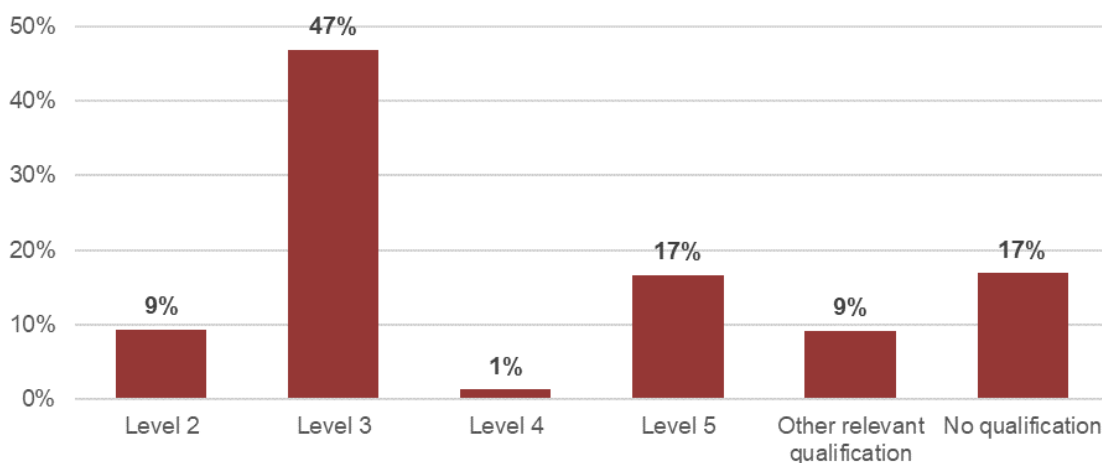
N=2,787 registered childcare and play settings

Workforce qualifications

5.15 SASS 2023 asked settings to report on the qualifications held by their respective workforces - the charts below provide detail on the proportion of workers holding each qualification.

5.16 The analysis of SASS 2023 showed that the most prevalent qualification level across childcare workers was level three, which was the highest attainment level for 47 per cent of childcare workers. This was followed by the 17 per cent of childcare workers reported as having a level five qualification, with 17 per cent of childcare workers also reported as having no relevant qualification.

Figure 6: Childcare worker highest qualifications

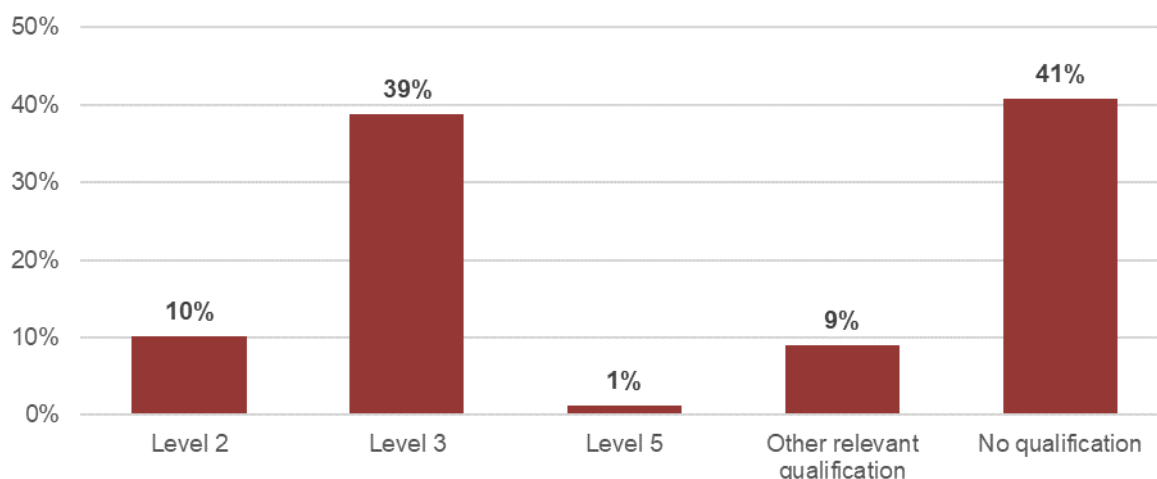


Source: Analysis based on responses to SASS 2023, which achieved a c.90 per cent response rate across registered settings in Wales.

N=2,787 registered childcare and play settings

5.17 Analysis of SASS 2023 indicated that the most prevalent qualification attainment level for playworkers was level three, which was the highest qualification level for 39 per cent of playworkers. Forty-one per cent of playworkers were reported as having no relevant qualifications.

Figure 7: Playworker highest qualification⁴⁵



Source: Analysis based on responses to SASS 2023, which achieved a c.90 per cent response rate across registered settings in Wales.

N=2,787 registered childcare and play settings

5.18 The Welsh Play Workforce Study (2021) also asked survey respondents to report their qualification level, with level two and three qualifications generally the most prevalent across those surveyed.⁴⁶

Table 5: Playwork workforce qualification levels

Playwork qualification	Playworker		Childcare/early years		Other professionals	
All level 2	45	40%	6	23%	15	47%
All level 3	48	43%	17	65%	13	41%
All level 4+	19	17%	3	12%	4	13%

Source: The Welsh Play Workforce Study (2021)

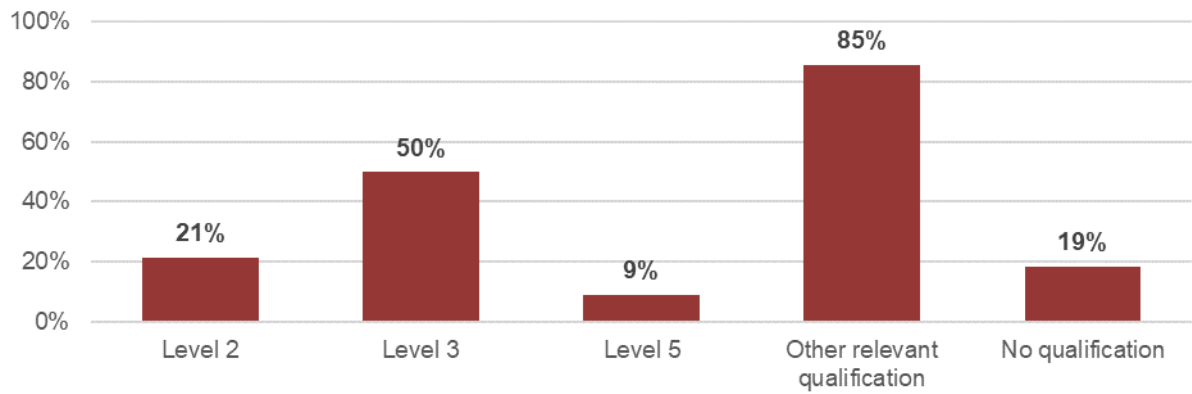
N=170 playworkers

5.19 Analysis of SASS 2023 indicated that the most prevalent attainment level across childminders was a level three qualification, with 50 per cent of childminders reported as being qualified to this level. Eighty-five per cent of childminders were also reported as holding other relevant qualifications.

⁴⁵ It should be noted that level 4 qualifications are absent from the chart as there are no level 4 playwork-specific qualifications.

⁴⁶ Welsh Play Workforce Study 2021. See: [Welsh Play Workforce Study 2021 - Play Wales](#). The full publication, with the referenced data and tables, is not published online by Play Wales.

Figure 8: Childminder qualifications by level



Source: Analysis based on responses to SASS 2023, which achieved a c.90 per cent response rate across registered settings in Wales.

N=2,787 registered childcare and play settings

Age

5.20 No data has been found which provides a comprehensive breakdown of the age of the childcare and playwork workforce in Wales, although insight from the scoping interviews conducted as part of this research suggests that the workforce is relatively young. This view is corroborated by findings from the Welsh Play Workforce Study 2021, which found that 43 per cent of the playwork workforce is age 35 or younger, with 65 per cent of the workforce being age 45 or younger.

Table 6: Age of the playwork workforce

	16-25	26-35	36-45	46-55	56-65	Over
Number of respondents	97	72	87	79	36	9
Share of respondents	25%	18%	22%	20%	9%	0%

Source: Welsh Play Workforce Study 2021

N=391 playworkers

Sex or gender

5.21 Whilst there is no comprehensive breakdown of the childcare and playwork workforce by gender or sex, the data that exists for specific sub-sectors of the workforce appears to corroborate stakeholder insight gained from this research that women make up a large majority of the workforce. The NDNA Cymru Workforce Survey 2018-19 found that around 95 per cent of respondents self-reported as women. The Welsh Play Workforce Study 2021 meanwhile found that around 83 per cent of respondents self-reported as female (see Tables 7 and 8).⁴⁷

⁴⁷ Welsh Play Workforce Study 2021. See: [Welsh Play Workforce Study 2021 - Play Wales](#). The full publication, with the referenced data and tables, is not published online by Play Wales.

Table 7: Gender in the workforce

	Men	Women
Share of workforce	5%	95%

Source: NDNA Cymru Workforce Survey (2018-19)

N=1,350 (estimate, based on 118 early years settings surveyed)

Table 8: Gender in the playwork workforce

	Female	Male	Trans male	Trans female	Gender non-binary	Other
Share of respondents	83%	16%	*	*	*	*

Source: Welsh Play Workforce Study 2021

Note: asterisked figures relate to categories with less than 1% of respondents.

N=391 playworkers

Ethnicity

- 5.22 There is no comprehensive data on how the childcare and playwork workforce in Wales breaks down across ethnic groups. The Welsh Play Workforce Study 2021 provided insight into the self-reported ethnicity of respondents, with 96 per cent of respondents identifying as white. This is higher than for the overall population in Wales, 91 per cent of which identified as white as per Census 2021 data.⁴⁸

Table 9: Playwork workforce by ethnicity

	White	Black/ African/ Caribbean	Mixed/ multiple ethnic groups	Arab	Asian	Prefer not to say
Share of respondents	96%	1%	1%	*	*	*

Source: Welsh Play Workforce Study 2021

Note: asterisked figures relate to categories with less than 1% of respondents.

N=391 playworkers

Disability status

- 5.23 Whilst no comprehensive data source was found on the disability status of the childcare and playwork workforce, the Welsh Play Workforce Survey 2021 found that around six per cent of respondents reported being disabled. This is notably lower than the 21 per cent of the overall Welsh population who identified as being disabled in Census 2021.⁴⁹

⁴⁸ Ethnic group, national identity, language and religion in Wales (Census 2021).

⁴⁹ Disability by age, sex and deprivation, England and Wales (Census 2021).

Table 10: Playwork workforce disability status

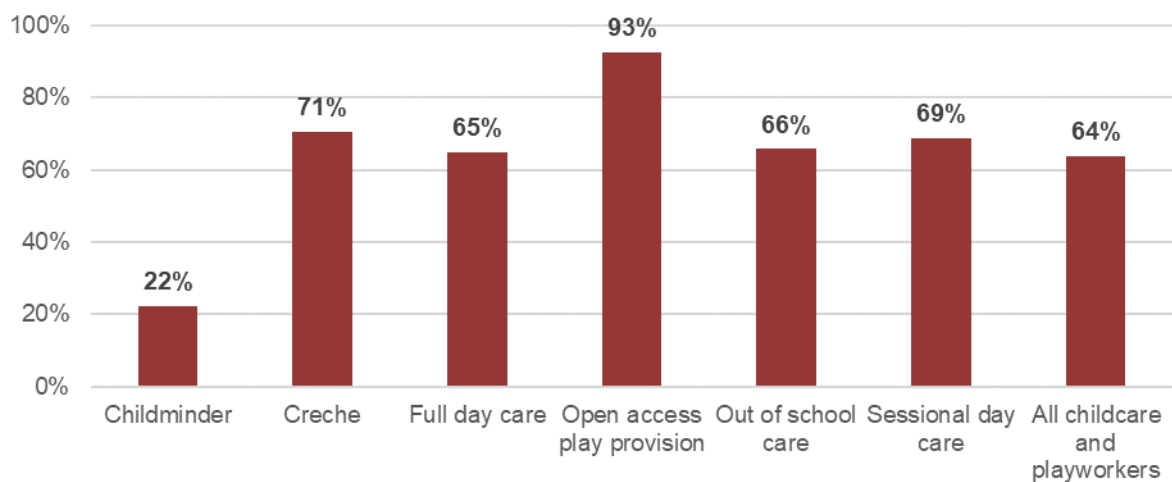
	Non-disabled	Disabled	Prefer not to say
Number of respondents	359	22	10
Share of respondents	92%	6%	3%

Source: Welsh Play Workforce Study 2021
N=391 playworkers

Workforce pay

5.24 SASS 2023 requested information from registered providers on the level of pay paid to their workers relative to the National Living Wage. The analysis of the data indicated that 64 per cent of childcare and playworkers were paid more than the National Living Wage as of 2023, although this proportion varied substantially depending on the setting type, ranging from 93 per cent of open access play provision workers being paid above the National Living Wage to 22 per cent of childminders.

Figure 9: Staff paid more than the National Living Wage, by setting type



Source: Analysis based on responses to SASS 2023, which achieved a c.90 per cent response rate across registered settings in Wales.

N=2,787 registered childcare and play settings

5.25 Several one-off studies also provided more detailed insight into workforce pay, with the Early Years survey, conducted in 2022 in Wales, finding that average staff pay ranged from £7.80 per hour for unqualified staff, to £10.90 per hour for supervisors, managers, or leaders. In light of current inflationary pressures, it is expected that worker pay could be an evolving area, highlighting the value of up-to-date estimates of worker pay.

Table 11: Average rate of pay by staff seniority

Rates of pay	Number of responses	Average £ per hour
Supervisors, Managers or Leaders	263	£10.90
Staff qualified at sector-relevant Level 3 (other than supervisors)	255	£9.30
Staff qualified at sector-relevant Level 2	157	£8.70
Unqualified Staff	117	£7.80

Source: Early Years Survey (2022)
N=323 childcare and play settings

- 5.26 The Welsh Play Workforce Study 2021 found the average salary for full-time playworkers to be £10.76 per hour. The survey also reported on variation in pay across levels of seniority, and part time versus full time employment.

Table 12: Average rate of pay by type of service

	Playworker	Childcare/ early years	Other play professionals
Number of respondents	17	15	8
Average hourly pay	£10.76	£10.61	£14.17

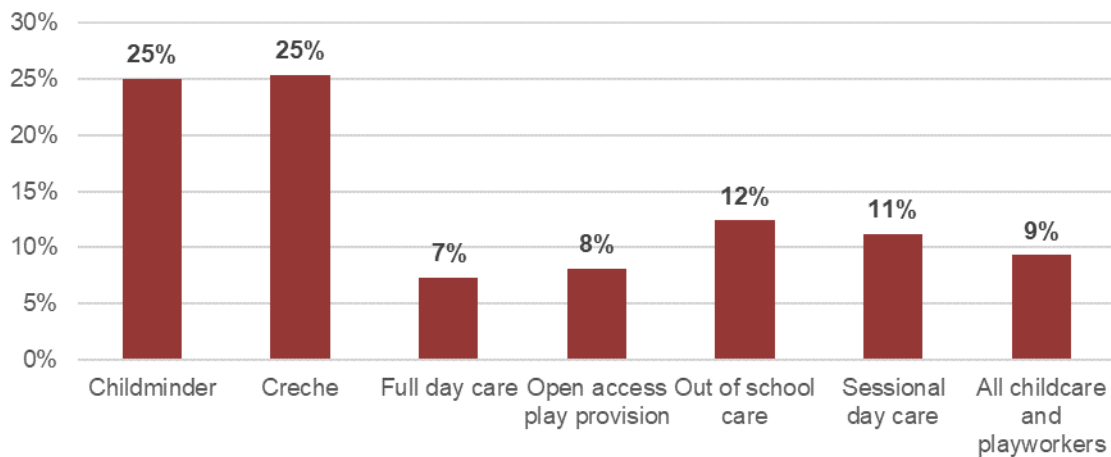
Source: Welsh Play Workforce Study 2021
N=40 full-time playworkers

Number and type of staff vacancies

- 5.27 SASS 2023 data provided insight into the level of staff vacancies faced by registered settings in Wales. Across all childcare and play providers the analysis indicated a staff vacancy rate of around nine per cent, although staff vacancy rates ranged substantially across setting types; from 25 per cent for childminders and creche settings to seven per cent for full day care settings.⁵⁰

⁵⁰ Staff vacancies for childminders refers to childminder support staff, including assistants.

Figure 10: Staff vacancies as a proportion of staff employed, by setting type



Source: Analysis based on responses to SASS 2023, which achieved a c.90 per cent response rate across registered settings in Wales.

N=2,787 registered childcare and play settings

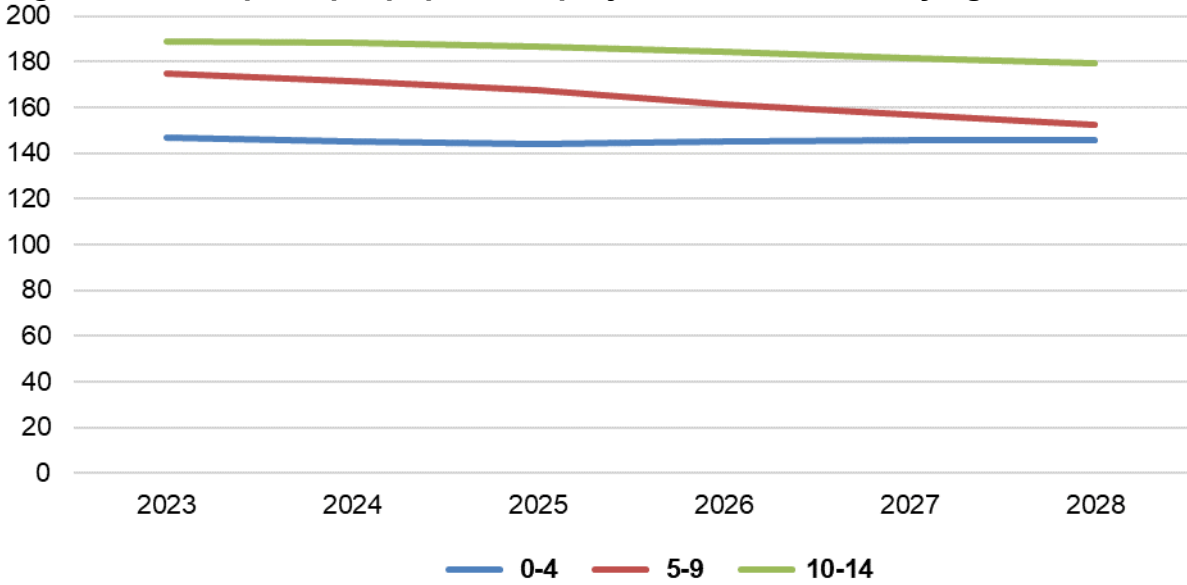
- 5.28 The Early Years Survey (2022) found that 37 per cent of 327 responding settings reported having job vacancies.

Population projections for young people

- 5.29 The future population of young people will also be a key driver of future demand for childcare. The chart below presents ONS's 2020-based principal population projections over the next five years for Wales across three age groups: 0 to 4 years, 5 to 9 years, and 10 to 14 years. Compared with 2023, ONS projected the population for the 0 to 4 age group to remain broadly flat through to 2028 at around 146,000, the population of the 5 to 9 age group to decline by 22,000 to around 153,000 in 2028, and the population of the 10-14 age group to decline by 10,000 to around 179,000 by 2028. Age-specific, 2018-based population projections for Wales are also published by StatsWales.⁵¹

⁵¹ 2018-based population projections for Wales. See: [Population projections by local authority and year \(gov.wales\)](https://gov.wales/population-projections-by-local-authority-and-year)

Figure 11: ONS principal population projections for Wales, by age band



Source: Office for National Statistics

6. Conclusions

- 6.1 There are a range of data sources which provide insight into the childcare and playwork workforce, as well as the characteristics of the service providers they work for and the children they support.
- 6.2 Some elements of data collection in the registered childcare and play sector are centralised and relatively comprehensive in terms of data on all or most registered providers being reported in one place (i.e., CIW register, SASS), with these datasets thus being key to understanding the baseline state of childcare and play service demand and the workforce. Key data provided through these sources include setting type, location, and language of operation, as well as data on workforce language skills and qualification level also being provided.
- 6.3 Data on the demographic and socio-economic characteristics of the childcare and playwork workforce is less complete, with the data that is available relatively dispersed across a number of different one-off publications. Despite this, several organisations have sought to understand their respective workforces through conducting and analysing their own surveys of providers or the workforce (e.g., NDNA, Play Wales). Large scale population surveys such as the Labour Force Survey can also provide some insight into the workforce at the national level, although the robustness of these results can be challenged.
- 6.4 Future policy scenarios, demographic change, and workforce trends will be key to projecting future workforce supply and demand. Key policies that have been identified which should be factored into the projections include current plans relating to Flying Start, the Childcare Offer, and strengthening Welsh-medium provision, with the model also being adaptive to future policy development. Projected population changes will also be factored into the model, alongside factors which could constrain the supply of workers (e.g., qualification, Welsh language skills).

Data gaps identified

- 6.5 Despite the existence of data on many aspects of the workforce, the following data gaps have been identified for which the Phase 2 fieldwork will be used to address:
- Despite some one-off attempts to do so for particular segments of the childcare and playwork sector (i.e., play settings, nurseries), there is a lack of comprehensive data collection on key demographic and socio-economic dimensions of interest for individuals in the workforce; in particular, by age,

gender, sex, ethnicity, pay level (a more detailed understanding than that provided by SASS), disability status, and job role.

- Whilst there is relatively comprehensive data provided through CIW on the maximum service capacity offered through registered service provision, there is less data available on actual service provision, which is more reflective of current demand. This data gap will likely limit the ability of the modelling conducted in Phase 2 to translate any changes to demand or demand-facing policies to the workforce requirements and spare capacity within the sector.
- Linked to the above, modelling the impact of the expansion to Flying Start provision, or any other funded childcare service, would require an understanding of how parents would react to policy changes in terms of both the quantity and type of services demanded. This is because such changes to policies could vary in their level of take-up as well as the extent to which they might displace provision from other types of childcare provision. In the absence of such data, simplifying assumptions may need to be made.
- Non-registered provision is out of scope for the purposes of the Phase 2 workforce projections, but it is worth noting that whilst the CIW register and SASS provide substantial insight into registered childcare and play service provision and workforce, data is more limited for non-registered providers. Given the limited insight into non-registered provision, it is unclear to what extent the limited data on non-registered provision, and the limited understanding of the interdependencies between non-registered and registered provision, will impact on the ability to accurately project demand for registered provision.

7. Recommendations for Phase 2

Stakeholder engagement plan

- 7.1 During Phase 2 an online survey will be designed and distributed to the childcare and playwork workforce and setting managers to provide further data on the characteristics and distribution of the childcare and playwork workforce. The structure and content of the survey will be driven by the nature of the data gaps identified during Phase 1 following stakeholder interviews and the review of data, with a focus on addressing the project's key research questions.
- 7.2 Given the data gaps highlighted above, the survey and interviews and/or focus groups will be used to collect data on the following:
- Introductory questions to understand the nature of the setting within the childcare and playwork sector, including setting type, main language of operation, and location. Whilst these data points are already collected through the CIW register and SASS, it will allow us to cross-tabulate other data collection with the characteristics of providers to provide a deeper insight.
 - Questions providing insight into the demographic and socio-economic characteristics of the workforce. Questions will focus on the main gaps identified, including worker age, gender/sex, ethnicity, pay levels, disability status, and job role. Whilst most options for sharing the survey currently involve distribution of the questionnaire to childcare and play settings, we will also explore options for disseminating the survey to segments of the workforce directly to collect additional information.
 - Understanding the actual utilisation of childcare and play service providers. This will allow us to derive a utilisation rate which will be used in the modelling to convert maximum place data to actual demand.
 - Qualitative insight into the challenges faced by childcare and play providers, in particular any issues of recruitment or retention settings face which may constrain the future supply of the workforce (e.g., caused by shortages in sufficiently qualified or Welsh-speaking candidates, insufficient pay). Questions will be geared towards understanding the size and causes of these problems, as well as future plans for addressing them.
- 7.3 The survey will be distributed to as large and wide a sample of settings and the workforce as possible to maximise the quality of the insight we can gather. The

Phase 1 interviews have opened up some promising leads for distributing the survey directly to settings, including through the CIW's database of contacts and via childcare and playwork industry membership organisations. We have not identified any promising routes for distributing the survey directly to the workforce, although we will explore options for doing so early in Phase 2. We will seek to make the sample as representative as possible by distributing the survey across all key setting types (via the relevant membership bodies), highlighting any limitations in the sample to the extent there are gaps.

7.4 To maximise response rates and the sample size, the survey will be distributed with the following elements:

- Provided in English and Welsh through a convenient online link to the questionnaire.
- Questionnaires will be as light-touch as possible, prioritising only the key information. We will conduct extensive testing of the user interface to ensure it is fit for purpose.
- The survey will be open for an initial 4-weeks. We will send intermittent chaser emails throughout to encourage responses, with the option for extending the window should the response rate be low.

7.5 The survey will be designed according to GSR guidelines during the early stages of Phase 2 before agreeing on the final version with Welsh Government.

7.6 The second part of the Phase 2 stakeholder engagement plan will focus on engaging directly with providers and settings across Wales. However, this research component will depend on analytical need agreed with the Welsh Government, based on preliminary results during Phase 2. Stakeholder engagement may likely consist of a focus group with providers and members of the workforce with the potential of complementing it through interviews, if required. The precise research questions will be agreed with the Welsh Government.

7.7 Recruitment for participants will be conducted through the survey by adding an additional question of whether the respondent would like to participate in further qualitative research activities. We can then select individuals to cover different setting types, geographical regions, or medium of provision to form an informative sample.

Projections of childcare and play service and workforce demand

- 7.8 During Phase 2 we will build a flexible model which will project the number of places and staff required to deliver commitments around childcare and playwork over the next five years, including relevant characteristics of these places and workforce. The projection model will be developed in Excel, with assumptions and data that can easily be updated, allowing the Welsh Government to refresh the analysis in real time.
- 7.9 Given the uncertainty around the future demand for childcare and play services, we will base the projections on a range of illustrative scenarios which could materialise, to give Welsh Government an understanding of the range of potential outcomes for the workforce.
- 7.10 Our proposal for model inputs, scenarios, and outputs is summarised in detail below.

Model inputs

- 7.11 The start-point for projections of childcare and play service demand and its workforce will be developing a snapshot of its current state (i.e. the baseline). This will require data on the number of places, and the size of the workforce, broken down across the key typologies of interest (summarised in Annex C).
- 7.12 We envisage that the baseline will include the following elements:

Table 13: Approach to modelling baseline childcare and playwork workforce demand

Baseline element	Approach
Number of childcare and playwork workers: <ul style="list-style-type: none"> • By setting • By location • By qualification • Ability to speak Welsh 	<p>We expect this to be largely derived from the SASS dataset, which as described above, contains breakdowns for settings, location, ability to speak Welsh, and qualification attainment.</p> <p>This would also determine the extent to which the data is granular enough such that the stated breakdowns are cross-cutting (e.g., are able to view qualifications by location). Should such level of granularity not be available it may be necessary to conduct the analysis at an appropriate level of aggregation and then apply proportions to estimate the implied breakdowns.</p>
Additional worker breakdowns which will	As discussed in section 5, there is a lack of comprehensive data on worker demographics for both care and play settings. One-off publications

<p>need to be explored further:</p> <ul style="list-style-type: none"> • Age • Gender • Ethnicity • Pay 	<p>exist that will be used to develop relevant breakdowns where possible. We will seek to use the Phase 2 fieldwork to supplement the evidence where possible.</p>
<p>Accounting for workers/providers not captured in SASS</p>	<p>Recognising that not all registered providers complete the SASS survey, should evidence be available, we will seek to account for this by providing an uplift to the number of workers in the SASS survey by understanding the response rate of registered providers to the survey. This will be done by triangulating information from existing publicly available evidence, any information provided by key experts within the sector, and the fieldwork in Phase 2.</p>
<p>Number of childcare and play places:</p> <ul style="list-style-type: none"> • By setting type • By setting location • By setting language of operation 	<p>We anticipate using the CIW database as the core source for these metrics and will supplement it with the SASS database where there are gaps. The interviews have highlighted the possibility of inconsistencies and discrepancies between the datasets, so we will take a holistic approach to triangulate information between the sources to arrive at informed estimates.</p>
<p>Places to worker ratios</p>	<p>We will use the above information to calculate the ratio of places to workers, with relevant breakdowns where possible. These ratios can be used to benchmark capacity and resource efficiency, for example at a local level.</p>

7.13 We expect that much of the data for understanding the current state of childcare and play service demand can be sourced from provider-level data in the CIW register and SASS returns, including the comprehensive (or near comprehensive, in the case of SASS) breakdowns of places and the workforce across setting types, extent of Welsh-medium provision, and by local authority.

7.14 To establish a current snapshot of the workforce in terms of characteristics which are not covered within the aforementioned publications, such as the demographic and socio-economic characteristics of workers, we will use a combination of (i) data collected through the Phase 2 survey, and (ii) data from previous surveys of childcare and play settings and workforce. Given these surveys typically only receive responses from a subset of the overall childcare and playwork workforce, we will likely be required to assess whether the findings from the sample can be extrapolated to the full population.

Model scenarios

- 7.15 As mentioned previously, there is uncertainty around the future demand and supply of childcare and play services, and the same is the case for its workforce. We will therefore model a series of scenarios illustrating how the childcare and playwork workforce will develop in the future based on various future outcomes for demand. As discussed in section 5, the limited data on the demand for childcare and play places will limit the ability to translate the impact of demand-facing policies and changes to general drivers of demand to future capacity and workforce requirements. Where possible, we will seek to make reasonable assumptions to allow analysis to be conducted, which will be supplemented with information gathered from the Phase 2 fieldwork.
- 7.16 The demand factors underpinning these scenarios will consist of current and potential future policy commitments and goals, demographic changes, and workforce trends.⁵² We will refine the scenarios to be explored in the modelling in discussion with Welsh Government during Phase 2, although an initial proposal for scenarios is presented below:
- **Policy scenarios and targets.** Users will be able to toggle between different policy scenarios to project the impact on workforce demand of current or potential future policy commitments or goals. Policy scenarios to be included in the modelling include:
 - **Flying Start expansion (first and second phases).** Commencing in September 2022, the first phase of the Flying Start expansion targeted providing support (across all four elements of Flying Start) to 2,500 additional children aged between 0 to four years (this target has now been exceeded), with those eligible receiving 12.5 hours of childcare per week for 39 weeks of the year.⁵³ The second phase of the Flying Start expansion will provide additional childcare support to more than 9,500 children aged between two to three years during 2023-24 and 2024-25, on a similar basis to the first phase.⁵⁴

⁵² It is worth noting that the factors being modelled are not an exclusive list of all factors which influence childcare demand, with other potential factors including, for example: the cost of childcare, parental income, and other public policies relating to childcare.

⁵³ Phased expansion of Early Years Provision, guidance. See: [Phased expansion of Early Years Provision | GOV.WALES](#)

⁵⁴ Welsh Government press release. See: [Flagship programme to expand Flying Start exceeds target in first phase | GOV.WALES](#)

- **Welsh-medium provision targets.** We will add scenarios reflecting the impact on the childcare and playwork workforce based on Welsh Government and local authority targets for Welsh-medium early years provision. As part of Cymraeg 2050, the Welsh Government plans to expand Welsh-medium early years provision by 150 Welsh-medium nursery groups within 10 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.
- **Illustrative future policy scenarios.** We will also provide scenarios to illustrate the impact of aspects of policy which could change in the future. Scenarios to explore could include, for example, the impact of increases or decreases to childcare and play provision (in terms of the number of places and hours of provision) on the workforce.
- **Demographic change.** We will use established population projections, such as 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. This could be done practically by estimating how many workers would be needed to maintain the current ratios of workers per place. Where possible to estimate robustly, we will also include projections based on demographic characteristics such as ethnicity.
- **Workforce trends.** Whilst supply-side factors impacting the workforce are generally more challenging to model, the modelling will explore the extent to which such factors could constrain the workforce in the future. Key variables which could act to constrain workforce supply would include wages, childcare and playwork qualifications, and Welsh-language skills.

7.17 It should be noted that determining the impact of policy changes on workforce demand is not straightforward, given the potential for displacement effects between different types of childcare or playwork provision. For example, an extra funded place provided through Flying Start might not add to the number of workers if it results in a shift of provision from care provided through a privately financed childminder. Assumptions will need to be made about the impact of each policy on new inflows into childcare and play provision, compared with places which generate displacement from another form of childcare.

Model outputs

- 7.18 We will develop a dashboard displaying the resulting projections in a clear and engaging way. This will include a breakdown of projected childcare and play service and workforce demand over the next 5-years, as measured by the number of places and the size of the workforce, across many of the key typologies of interest.
- 7.19 More specifically, we expect the projections to include the following outputs:
- Demand for childcare and play places, by:
 - Setting type.
 - Local authority.
 - Setting language of operation.
 - Childcare and playwork workforce, by:
 - Setting type.
 - Local authority.
 - Share of Welsh-medium provision.
- 7.20 Visualisations of key pieces of data will be developed through an interactive data tool which can allow the Welsh Government to interrogate the data in a visually appealing way. We envisage this will be most useful for geographical data, which can be displayed as spatial heatmaps, or to demonstrate the range of potential outcomes (for example, through use of fan charts).

Annex A: List of stakeholders participating in scoping interviews

Participants working within the Welsh Government

- Number of officials interviewed: 8
- Number of interviews conducted: 6
- Roles and areas of work of Welsh Government officials:
 - o Research and social research officers
 - o Childcare and Play policy team
 - o Statisticians

External stakeholder organisation representatives

- AWARE
- Care Inspectorate Wales, CIW
- Clybiau Plant Cymru Kids' Clubs
- Early Years Wales
- Mudiad Meithrin
- NDNA
- PACEY
- Play Wales
- Social Care Wales

Annex B: Interview topic guide for external scoping interviews

Introduction

Good morning/afternoon and thank you for finding the time to take part in this interview.
How are you today?

We work for the research company Alma Economics, and we have been commissioned by the Welsh Government to map the current state of the sector's workforce, including recruitment and retention, the characteristics of the workforce such as Welsh language skills and demographic profile as well as potential available data sources through which we will seek to establish future projections through modelling. Our discussion today will last up to 60 minutes and will help us understand the realities in the sector which is why we are consulting with key stakeholders such as you to inform the research.

Your participation is completely voluntary, any personal data provided will be deleted by us (Alma Economics), and any raw data will be anonymised before being shared with the WG, except if you provide contact details for the purpose of managing data sources. A complete list of participating organisations will be shared with the Welsh Government. If there's a question you don't want to answer you're not obliged to do so. Do you have any questions about your participation before we get started?

(Optional) Would you be happy for me to transcribe our interview to support with the later analysis?

Organisation-specific questions

1. To get started, can you describe in just a few words your role and your day-to-day activities with regard to the childcare and playwork sector?
2. What type of organisation or setting do you work in? What are the key functions and tasks of your organisation?
 - a. Could you walk me through its key characteristics such as membership (eg. Organisations, providers, individuals) and what types of settings you work with?
 - b. What geographical coverage does your organisation achieve?
 - c. Do you hold any data on your membership bodies and/or organisations?

Structure and challenges in the childcare and play sector

3. What successes have been achieved in the sector over the past 5 years? Please focus on how this relates to (positive) developments in the workforce.

4. What are the main challenges or pressures facing the sector? What challenges relate specifically to its workforce?

5. Is the sector able to cope with current demand for childcare and play provision? If not, what would you say are the main gaps in current provision?

(Optional): Does this apply equally across all geographical areas of Wales?

(Optional): Is the sector able to provide sufficient Welsh-language settings and staff?

(Optional): How do providers cope with excess demand (if applicable)?

Future potential and projections

6. In the coming years, what do you think will be the main opportunities for the childcare and play sector in Wales?

7. *(Optional) Do you anticipate any future challenges from existing or future policies?*

8. What do you think are the biggest hurdles to achieving diversity in the Welsh childcare and play workforce?

9. The WG has set the target of achieving 1 million Welsh speakers by 2050. Considering the role that early year's childcare and play provision plays in achieving this goal, what are the main obstacles?

10. *(Optional): In future phases of our project, we will undertake interviews with childcare and play providers across Wales as well establishing a model for future workforce developments. What do you think we should focus on specifically? Are there any research questions that you think are of particular relevance?*

Monitoring and Data scoping

11. What data do you have access to on the childcare and play workforce in Wales? We are interested in data collected by your organisation as well as any other external data sources. We are particularly interested in the following: workforce demographics (eg. Gender, age, etc.), disability, Welsh language skills, diversity, professional role, qualification level, pay, geographical location, vacancy numbers.

(Optional): If this is a new source, are we able to access this data?

(Optional): How is this data collected? At what frequency is this published?

12. Are you aware of any data or evidence on workforce and recruitment challenges in the sector?

13. Are you aware of any ongoing or planned future data collection that could help us identify trends in the Welsh workforce and/ or future potential?

(Optional): If so, who is collecting this data? What indicators? At what frequency?

(Optional): Are you (or will we) likely be able to access this data?

14. Are you aware of any existing forecasts on the number of children requiring childcare or play provision?
15. We are looking to build a model which will project the future composition of the childcare and play workforce in Wales. What key questions would you like this model to answer, if it was possible?
16. Are there any other gaps in the data that currently prevent you from answering important questions for your work in the sector?

Debrief

17. Are there any other issues that you think would be valuable for us to discuss that we have not asked you about?
18. As mentioned at the start of our interview, we are conducting interviews with a number of stakeholders in the childcare and play sector. Are there any bodies or organisations that you would recommend us to reach out to for this research in future stages?

Annex C: Key dimensions of interest for childcare data mapping

- **Workforce**

Including descriptive analysis of the key characteristics of the childcare and play workforce, and exploration of any relationships between these factors, including:

- age
- sex
- gender
- ethnicity
- disability
- Welsh language skills
- setting type they work in (e.g. sessional day care, full day care, play)
- main language of operation of setting they work in (Welsh, English, both)
- job role
- qualification levels
- pay levels
- distribution / geographic location (e.g. by local authority, WIMD, urban / rural classification)
- number and type of vacancies

- **Number and nature of childcare and play spaces in registered settings**

Including an analysis of availability of spaces by the different characteristics of the setting:

- setting type
- main language of operating (Welsh, English, both)
- distribution / geographic location (e.g. by local authority, WIMD, urban / rural classification)
- age of child catered for