Playwork People 3: research into the characteristics of the playwork workforce

SkillsActive

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0. EXECUTIVE SUMMARY

Introduction

The Playwork People survey is SkillsActive's biennial survey of the playwork workforce. It is the largest dedicated survey of playworkers in England, and provides an invaluable source of quantitative information about the characteristics of the workforce.

This report presents the findings of the third Playwork People survey, based on the results of two separate questionnaires: one of playwork employers and one of playwork employees conducted from January to April 2007. Nationally 1,295 responses were received to the survey of employees and 573 to the survey of employers.

The Playwork People survey aims to provide data and information to underpin and inform the development and understanding of the playwork workforce and training/qualifications provision.

The bullet points below provide a summary of the main findings of the report.

The Playwork Workforce

- Playwork is a female-dominated profession, with four out of five workers women (85.9%).
- 91.4% of playworkers describe their ethnic origin as white. This differs considerably by region, with London representing the most diverse playwork workforce and the West Midlands the largest proportion of Asian playworkers.
- Nearly one third (28.8%) of respondents to the employee survey describe themselves as playworkers. 18.5% work as managers and 8% as senior playworkers or play leaders.
- According to employers, approximately 19.3% of all playwork employees work as volunteers and nearly half (47.6%) of all play settings are run by a voluntary management committee.
- One third (33.4%) of the playwork workforce hold more than one playwork job.
- The playwork workforce is predominately part time (55.6%), with only 35.8% working full time.
- The average hourly salary reported by playwork employees is £7.70. This is significantly higher than reported in 2005 (£4.29) and is in part due to the different make-up of respondents. This particular sample has more management-level jobs than in 2005.
- 8.4% of respondents had less than one year's service in the sector, a significant decrease from 2005 where 21.7% of employees stated that they had less than one year's experience. 49.9% had less than five years' experience.
- Positively, over three-quarters of respondents (77.2%) said they are "very likely" or "quite likely" to be working in the sector in 2009.
- Two out of five employees (42.6%) would leave the sector because of low pay compared to other industries, while 37.5% would leave for better prospects or career paths in other industries.

Playwork Organisations

- Playwork settings can generally be termed as micro-businesses with fewer than 10 employees. 64.8% of employers stated that they employed ten or fewer full-time, part-time, paid or unpaid staff.
- The majority of employers run out-of-school clubs (71.3%) and/or holiday play schemes (56.7%). Over half the employers that run out-of-school clubs are also running holiday play schemes, providing year-round provision. As might be expected, three out of five play settings (60.0%) are located on school premises.
- Just over a third (34.1%) of respondents stated that they work for a voluntary organisation or charity and nearly a third for an organisation run by a local authority (30.9%) or a private business (28.4%).
- Nearly three-quarters (73.9%) of play organisations rely on income from parents and carers as one of their sources of funding, compared to just over half (52%) in 2005.
- 67.1% of employers in 2007 described the prospects for their play provision as optimistic, compared to 53% in 2005. Employers described the biggest challenges to their play provision as funding, staff, premises/equipment and government policy.

Skills, Qualifications and Training

- Team working and communication are perceived by employers to be the most important skills for the play sector, whilst relatively low importance is given to foreign languages and basic computer/IT skills by employers in the sector.
- Three-quarters (74.3%) of playwork employers thought that the level of skill needed to do playwork jobs is increasing. In 2005 and 2007 employers were most likely to say that "new legislation or regulatory requirements" or "government policy, initiatives or new funding" had affected the skills they needed in their workforce over the last three years.
- Nearly half of all playwork employers are experiencing a skills gap in their current workforce (48%). Worryingly, this is even higher than the 29.2% of employers who identified a skills gap in their workforce in 2005 and suggests that skills gaps are a significant problem for playwork employers.
- The key skill lacking in the workforce is "Knowledge of playwork values and principles", which 52.8% of employers stated was a skills gap in their current workforce. Initiative (49.8%), planning and preparing work (40.9%) and management (33.6%) skills were other skills found lacking in the current workforce.
- The biggest impact of skills gaps on play provision is an increased workload for other staff (52.9%). Skills gaps also impact on one in four organisations by delaying employers from introducing new working practices (42.9%).
- To counter the impact of skills gaps playwork employers are most likely to provide further training for their workforce (85.4%). However, nearly a third (32.0%) of employers would take no action at all.
- New recruits often do not have the appropriate skills for the playwork jobs they are applying for. Four out of five employers (82.0%) identify that skills that are specific to playwork are lacking in new recruits.
- The majority of respondents hold a level 3 qualification and 80.1% of these level 3 qualifications are in playwork. 31.0% of the playwork workforce hold a level 4 or 5 qualification whilst 20.3% hold a level 2. 2.8% of the sector stated that they hold no qualifications at all.

- Over a third of respondents currently hold (34.3%) or are working towards (31.6%) a NVQ level 3 in Playwork. For the majority of respondents the highest playwork qualification they hold is a level 3 (29.6%), whilst for 13.3% level 2 is their highest playwork qualification and for 4.7% it's level 4 or above.
- Over half of employees (52.4%) hold no playwork-specific qualification at all.
- According to employers, half (49.3%) of all employees received some form of training (including informal in-house training) in the last 12 months.
- The majority of organisations (28.0%) spent between £100 and £499 on training in the past 12 months. Nearly 9.6% of playwork organisations do not spend anything on training.
- In the last 12 months, workers in the playwork sector are most likely to have undertaken training in first aid (78.3%), child protection (73.4%), food hygiene (47.6%) and health and safety (46.6%).
- Most playworkers (30.7%) received between one and three days' training in the last 12 months, whilst 21.4% received 11 or more days' training.
- Overall, one in nine respondents (91.2%) believes that they have received adequate training in order to do their job. Volunteers are least likely to consider that they have had adequate training with 18.2% of volunteers stating that they had not.
- According to employers a large proportion of training is delivered by external consultants or training providers (74.2%). Two in five employers (39.8%) deliver training through an existing member of staff and 37.7% by a dedicated government or local authority team.
- One of the biggest factors limiting the provision of training is the time of day when courses are run. Over three-quarters (76.1%) of employers cited this factor as a barrier. The cost of training to employers also presents a barrier for 56.7% of employers.

Recruitment and Vacancies

- 743 vacancies were reported in the last 12 months by the 573 employers responding to the Playwork People Survey 2007. This equates to 34.8% of all employment being vacancies in 2007 which is slightly higher than the 29.7% reported in 2005.
- 38.5% of all vacancies were described by employers as hard to fill.
- The two most likely reasons for hard-to-fill vacancies are "not enough people interested in this type of job" (55.5% of employers experiencing a hard-to-fill vacancy) and "low number of applicants with the required skills" (44.2%).
- The most frequently cited implication of hard-to-fill vacancies are an increased workload for other staff (50.1%) suggesting that other staff take on the duties and workload of those unfilled posts.

1. INTRODUCTION

The Playwork People survey is SkillsActive's biennial survey of the playwork workforce. It is the largest dedicated survey of playworkers in England, and provides an invaluable source of quantitative information about the characteristics of the workforce.

This report presents the findings of the third Playwork People survey, based on the results of two separate questionnaires: one of playwork employers and one of playwork employees conducted in 2007.

1.1 Background

The Playwork Unit at SkillsActive works to set and maintain standards in training and qualifications for playworkers, and aims to increase the profile of play. To ensure that this remit is met there is a need for robust and reliable data about the characteristics of the playwork workforce. The Playwork People survey has an important role to play in understanding the playwork workforce and its skills and qualifications, particularly where this information is not available from national data sources.

The focus of this report is the findings of Playwork People 3, which builds on the previous phases of research and analyses data for both employees and employers. The questionnaires were developed in the light of previous findings and where possible aimed to produce results that would be comparable to Playwork People 1 and 2. This phase of Playwork People research also aimed to achieve enough responses to provide an analysis of results on a regional basis.

This year's project was publicised extensively through relevant trade press and networks. SkillsActive would like to thank all those who took the time to promote and participate in this year's surveys.

1.2 Aims and objectives

The aim of the Playwork People survey is to:

Provide data and information to underpin and inform the development and understanding of the playwork workforce and training/qualifications provision.

The specific objectives of Playwork People 3 were to:

- Develop and conduct a survey of playwork employers to profile the workforce, understand recruitment and vacancies, identify workforce skills and skills gaps and assess workforce development and training.

- Develop and conduct a survey of employees in the playwork sector in order to profile the characteristics of the workforce, their skills and qualifications.

- Achieve a regional breakdown of results for the nine SkillsActive regional offices in England.

- Compare the findings nationally, where possible, to the Playwork People 1 and 2 surveys.

- Use the findings as a basis for ongoing research and to identify gaps in knowledge for future quantitative or qualitative research projects.

1.3 Methodology

The Playwork People survey consists of two confidential self-completion questionnaires: one for playwork employers and one for playwork employees. These populations were defined as follows:

- **Playwork employees** - all those working in playwork, at any level, including volunteers, the self-employed and those where playwork is not their main job. For example, owners/managers of a setting, play leaders, playworkers, play development workers, supervisors and holiday play scheme workers. More than one employee at a play setting could complete a questionnaire.

- **Playwork employers** - The person responsible for recruitment and managing staff at one or more play settings. For example, the owner or manager of a setting or the play service manager at a local authority. Only one person could complete this questionnaire for each play setting.

Fieldwork was conducted between January 15th to April 27th 2007 by using self-completion questionnaires that were distributed by post, via the internet and email and given out at events. The aim was to reach as many playworkers as possible, across the whole spectrum of playwork settings. There is no single source of contacts for playworkers or playwork employers. As such, the survey was reliant on the contact databases of SkillsActive's Regional Centres for Playwork Education and Training and a snowball effect of questionnaires being passed on through networks and at events. As with any self-completion questionnaire there is an element of self-selection where only those who consider themselves to be playworkers or playwork employers and feel that the questionnaire is relevant to them will respond.

Questionnaires were designed and piloted by SkillsActive based on the questionnaires used for Playwork People 2 and fieldwork was conducted with the help of SkillsActive's regional managers for playwork.

1.4 Size and structure of the survey

573 responses were received from playwork employers and 1,295 from playwork employees across England.

Table 1.4(a) Breakdown of responses by survey and region

	Employees responding		**Employers responding**	
	Absolute	%	**Absolute**	%
East Midlands	108	8.3%	51	8.7%
East of England	109	8.4%	50	9.2%
London	128	9.9%	42	7.3%
North East	143	11.0%	80	7.7%
North West	140	10.8%	44	15.0%
South East	166	12.8%	86	10.3%
South West	131	10.1%	53	18.8%
West Midlands	184	14.2%	108	14.0%
Yorkshire and Humber	186	14.4%	59	8.9%
Total	1,295		573	

1.5 Reporting

This report presents national-level data from both the survey of employers and employees. The source of the data is denoted by the reference at the bottom of each table or chart. Detailed regional analysis of the findings is available in separate summary reports for each of the nine English regions.

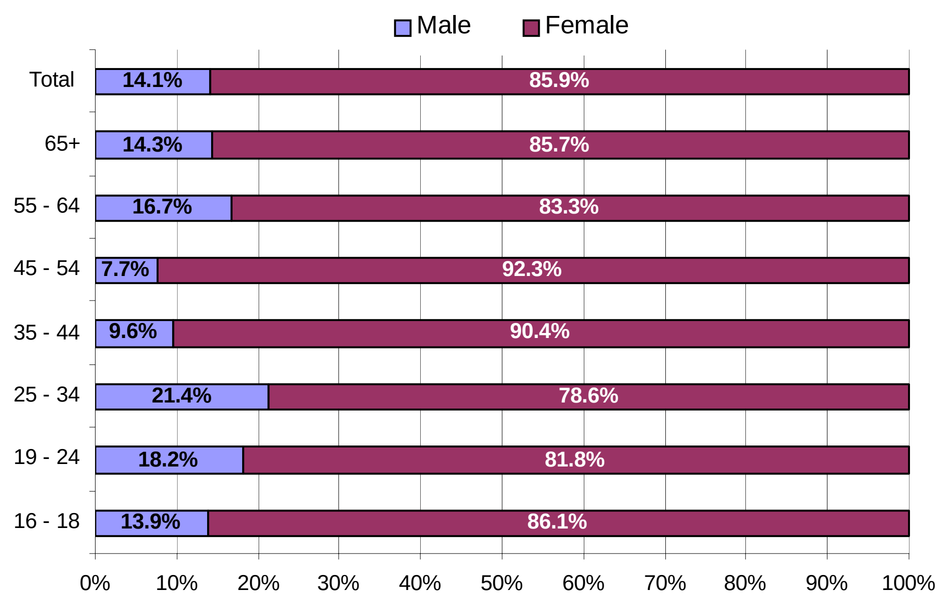
2. CHARACTERISTICS OF THE PLAYWORK WORKFORCE

2.1 Demographic profile

Playwork is a female-dominated profession, with four out of five respondents (85.9%) women. This is consistent with our knowledge of the playwork sector and with evidence collected from previous Playwork People surveys. In 2003 95% of respondents were women and 88% in 2005.

Female playworkers generally have an older age profile than male playworkers. The chart below shows that more male playworkers are aged between 19 and 34, whilst more female playworkers are aged between 35 and 54.

Diagram 2.1(a) Age bands by gender



Base: Playwork Employees, 2007

Nationally, the playwork workforce is predominantly white. 91.4% of respondents stated their ethnic origin as white in 2007 (93% in 2005). As would be expected, Playwork People highlights regional differences in the ethnic background of playworkers which reflects the ethnic make-up of regional populations. London can be described as having the most ethnically diverse playwork workforce where 11.5% state that they are Asian or Asian British, 22.1% Black or Black British, 1.8% Chinese and 7.1% mixed race. Outside of London the West Midlands has the largest proportion of Asian workers in their playwork workforce (4.0%) and the South West has the largest proportion of Black workers (4.7%).

Table 2.1(a) Ethnic background of playworkers

How would you describe your ethnic origin?

		Asian or Asian British	Black or Black British	Chinese	Mixed Race	White	**Total**
London	%	11.5%	22.1%	1.8%	7.1%	57.5%	
	n	*13*	*25*	*2*	*8*	*65*	*113*
South East	%	1.9%	3.8%	0.6%	1.3%	92.5%	
	n	*3*	*6*	*1*	*2*	*148*	*160*
South West	%	0.8%	4.7%	0	0.8%	93.8%	
	n	*1*	*6*	*0*	*1*	*120*	*128*
East of England	%	1.9%	1.9%	0	0	96.2%	
	n	*2*	*2*	*0*	*0*	*102*	*106*
West Midlands	%	4.0%	1.7%	0.6%	2.3%	91.5%	
	n	*7*	*3*	*1*	*4*	*161*	*176*
East Midlands	%	1.9%	1.9%	0	0.9%	95.3%	
	n	*2*	*2*	*0*	*1*	*101*	*106*
North West	%	1.4%	2.2%	0	0.7%	95.7%	
	n	*2*	*3*	*0*	*1*	*132*	*138*
Yorkshire and the Humber	%	2.2%	1.6%	0.5%	0	95.6%	
	n	*4*	*3*	*1*	*0*	*175*	*183*
North East	%	0	0	0	0.7%	99.3%	
	n	*0*	*0*	*0*	*1*	*140*	*141*
England	**%**	**2.7%**	**4.0%**	**0.4%**	**1.4%**	**91.4%**	
	n	***34***	***50***	***5***	***18***	***1144***	***1251***
Unclassified							*44*
Total							*1295*

Base: Playwork Employees, 2007

2.2 Occupational profile

Nearly a third (28.8%) of respondents to the employee survey described themselves as playworkers, 18.5% work as managers and 8% as senior playworkers and play leaders. Job roles are varied and respondents included workers in the early years sector, who would not normally be associated with playwork, for example childminders and nursery nurses who still felt that playwork formed an important part of their role. Small numbers of respondents, who may not ordinarily be considered as part of the playwork sector but who consider themselves to include play in their method of working, defined themselves as leisure workers or uniformed group leaders.

All respondents are directly involved in some way with play and playwork. All respondents reported to be either in face-to-face playwork positions, or managers, directors of services, owners or proprietors of provision, or committee members.

Table 2.2(a) Occupation

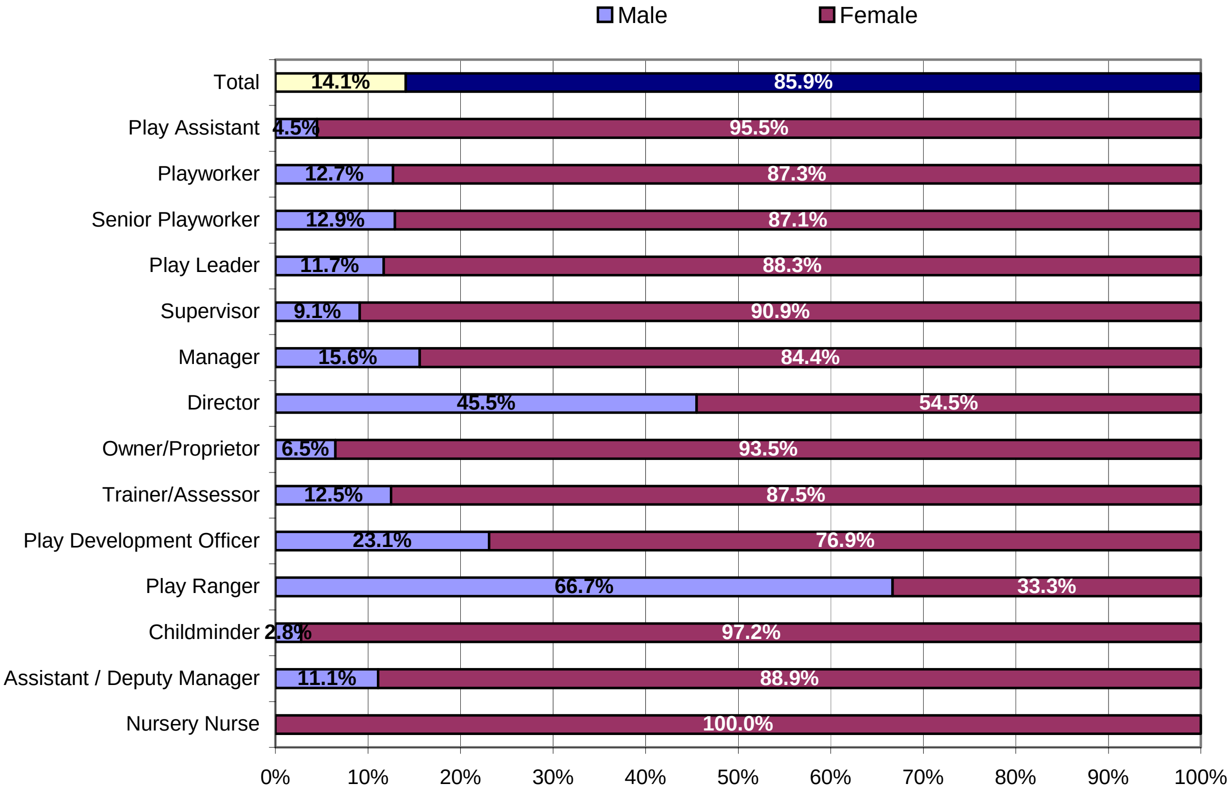
Which of the following best describes your main occupation?

	count	%
Playworker	372	28.8%
Manager	239	18.5%
Senior Playworker	103	8.0%
Play Leader	103	8.0%
Supervisor	77	6.0%
Play Assistant	67	5.2%
Play Development Officer	66	5.1%
Trainer/Assessor	41	3.2%
Childminder	36	2.8%
Owner/Proprietor	31	2.4%
Nursery Nurse	20	1.6%
Director	11	0.9%
Play Ranger	10	0.8%
Assistant /Deputy Manager	10	0.8%
Holiday Play Scheme Worker	9	0.7%
Adventure Playground Worker	9	0.7%
Chairperson	6	0.5%
Committee Member	5	0.4%
Hospital Play Specialist	5	0.4%
Other	70	5.4%
Sub-total	1,290	
Unclassified	5	
Total	1,295	

Playwork Employees, 2007

Men are well represented in the playwork workforce as directors in play settings or as play rangers. Employees coming into the sector as play assistants are 20 times more likely to be women than men.

Diagram 2.2(a) Occupation by gender (for occupations with more than ten respondents)



Base: Playwork Employees, 2007

2.3 Volunteers

Volunteers are a valuable part of the playwork sector and in many cases are responsible for setting up after-school clubs and contributing to their ongoing development and operation. According to employers, approximately 19.3% of all playwork employees are working as volunteers (compared to a reported 15.9% in 2005). We also know that many playworkers work in a voluntary capacity as well as being paid and may hold both a voluntary role and a paid role at the same or different play settings.

Nearly half of all play settings (47.6%) are run by a voluntary management committee. At the time of completing the questionnaire 36.2% had a vacancy on their voluntary management committee.

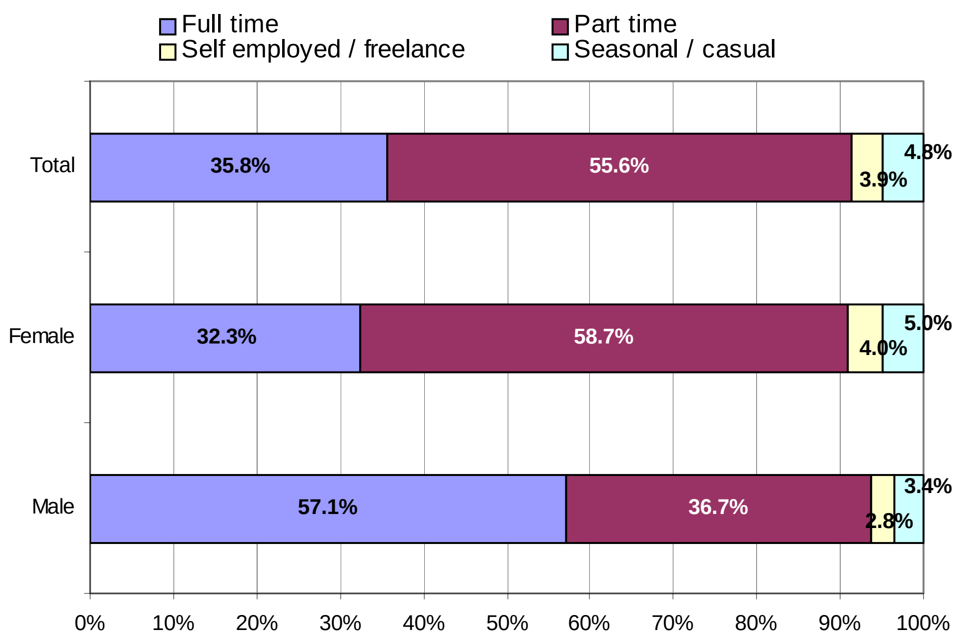
2.4 Work patterns

Employees were asked to give details of their main playwork job when asked about their working patterns. They were asked to judge this based on the hours worked for their main employer rather than on income received. Thus the main playwork job could be paid or voluntary work. Asking about the main job recognised that some playworkers may have jobs in more than one role, setting or type of work.

One in three (33.4%) playwork employees has more than one playwork job (28.7% in 2005). Most of the playwork jobs that are available are part time or seasonal and it is common for playworkers to make up a full-time equivalent job by working in two or more part-time jobs e.g. at a breakfast club in the morning and an after-school club in the afternoon. Or, to have one job which covers term-time and another in the school holidays to provide year-round employment e.g. an after-school club and a holiday play scheme. Playworkers may also work in other childcare roles as well as their playwork job, for example, at a breakfast club on school premises before school and in the school during the day as a classroom assistant.

Most playworkers work part time (55.6% work part time compared to 35.8% full time). Only 3.9% of respondents are self employed or freelance workers and 4.8% are seasonal or casual workers. However, it should be noted that the time period over which data collection took place (January to April) would have a significant impact on the proportion of seasonal or casual workers responding to the survey as these people are most likely to be employed, and therefore responding to questionnaires, over the school summer holidays rather than the period covered. It is also possible that many respondents working part time at the time of the survey work full time during the school holidays.

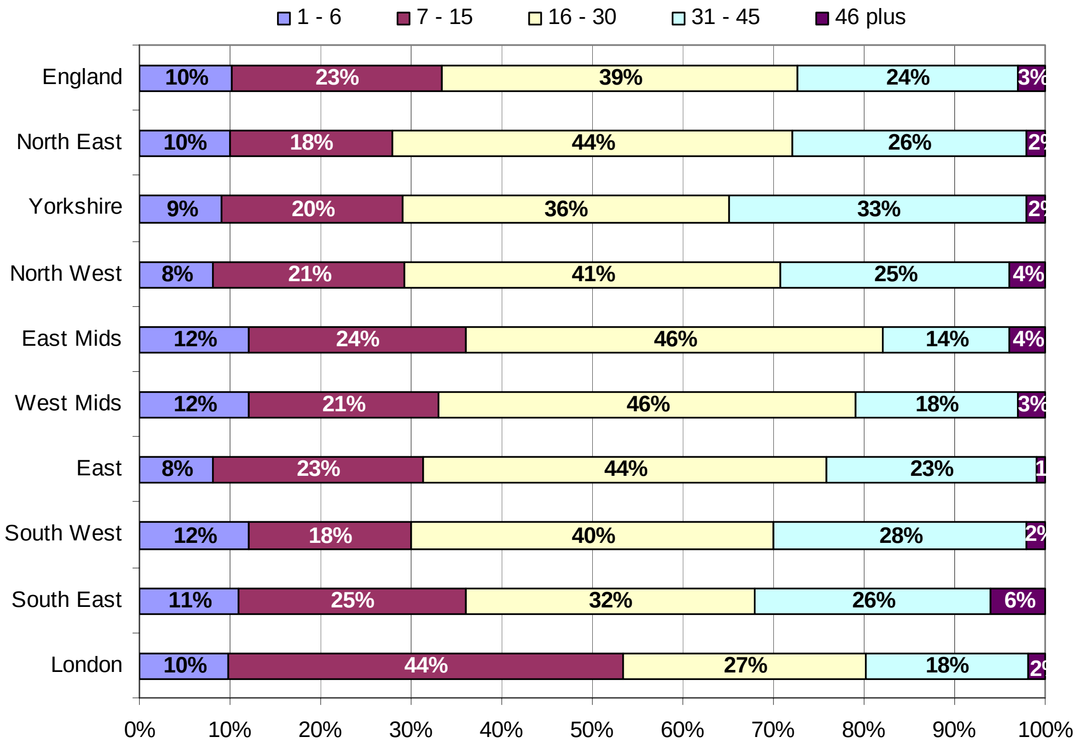
Diagram 2.4(a) Mode of employment by gender



Base: Playwork Employees, 2007

The chart below illustrates the hours worked per week by the playwork workforce, including full-time and part-time employees, the self-employed and volunteers. There are a large proportion of part-time workers in the playwork sector and the average number of hours worked by employees in the sector is lower than the national average for all job types.

Diagram 2.4(b) Number of hours per week worked by employees in their main playwork job



Base: Playwork Employees, 2007

Employees, working in paid playwork roles, were asked how much they are paid per hour in their main playwork job. Approximately 60% of respondents (756 playwork employees) answered this question.

The average salary reported by playwork employees is £7.70 per hour. This is higher than the previous 2005 Playwork People survey (£4.29), which may in part reflect the different make-up of respondents and the fact that the 2007 sample has more management-level jobs than in 2005.

As might be expected, employees in London reported the highest average hourly pay (£9.70), whilst playworkers in the West Midlands appear to be the least well paid (£6.60).

Table 2.4(a) Average hourly salary by region

Region	Average hourly salary (£)
London	£9.70
South West	£8.80
South East	£7.80
Yorkshire and the Humber	£7.80
North East	£7.50
North West	£7.40
East of England	£7.30
East Midlands	£7.00
West Midlands	£6.60
England	**£7.70**

Full-time workers receive more pay than part-time workers, with the self-employed apparently earning the lowest wages. Men also appear to be paid more than women in full-time, part-time, self-employed and seasonal roles.

Table 2.4(b) Average hourly salary by hours worked in a typical week and gender

	Male	Female	Total
Full-time	£11.60	£8.40	£9.20
Part-time	£8.30	£7.10	£7.20
Self-employed	£6.50	£5.00	£5.10
Seasonal or casual workers	£9.00	£6.90	£7.10

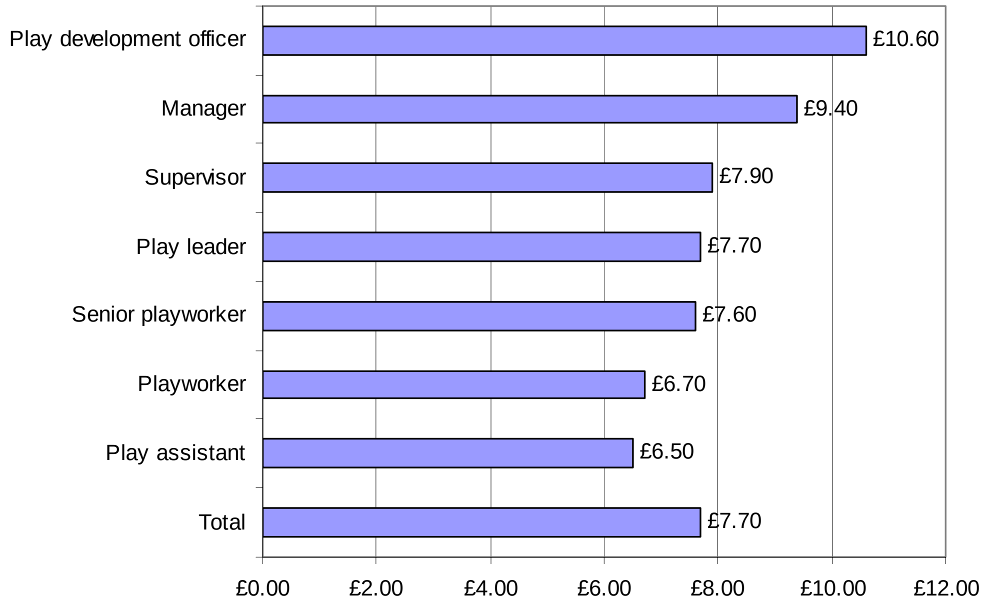
Employees working at local authority-run organisations are paid more than those working for private businesses dependant on making a profit, and also paid more than those working for both voluntary organisations and charities.

Table 2.4(c) Average hourly salary by type of organisation

Type of organisation	Average hourly salary (£)
Private business	£6.50
Voluntary organisation or charity	£7.90
Local authority run organisation	£8.60

When looking at the average hourly wage by the main occupations of respondents, play development officers appear to be paid the most, followed by managers and supervisors.

Diagram 2.4(c) Average hourly salary by main playwork occupations



Base: Playwork Employees, 2007

2.5 Employment turnover and retention

8.4% of respondents to the survey of employees had less than one year's service in the sector, a significant decrease from 2005 where 21.7% of employees stated that they had less than one year's experience. Half (49.9%) had less than five years' experience.

Table 2.5(a) Length of employment in playwork

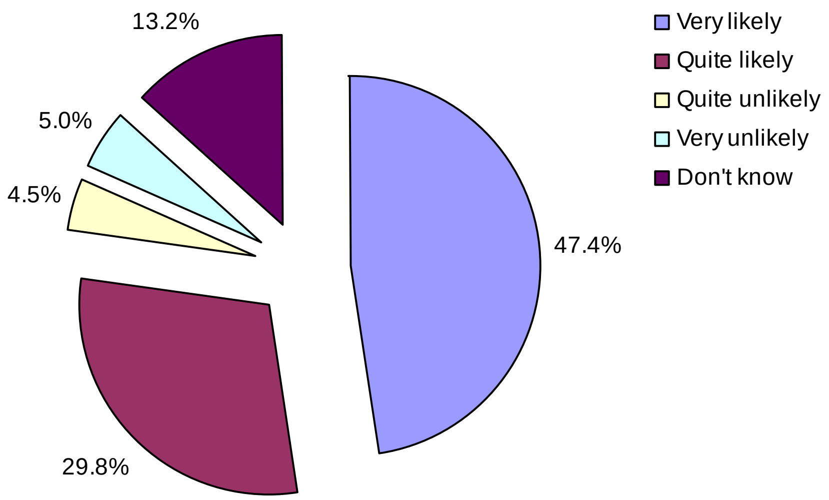
How many years have you worked in playwork?

	2003	**2005**	**2007**
Less than one year	12.2%	21.7%	8.4%
1-2 years	17.8%	27.6%	13.6%
3-5 years	32.4%	22.6%	27.9%
5-10 years	16.6%	13.2%	27.0%
10 years plus	21.0%	12.5%	23.2%

Base: Playwork Employees, 2003, 2005, 2007

Employees in playwork were generally positive in terms of remaining in the sector over the next three years. Over three-quarters of respondents (77.2%) said they are “very likely” or “quite likely” to be working in the sector in 2009.

Diagram 2.5(a) How likely are you to be working in the sector in three years’ time?



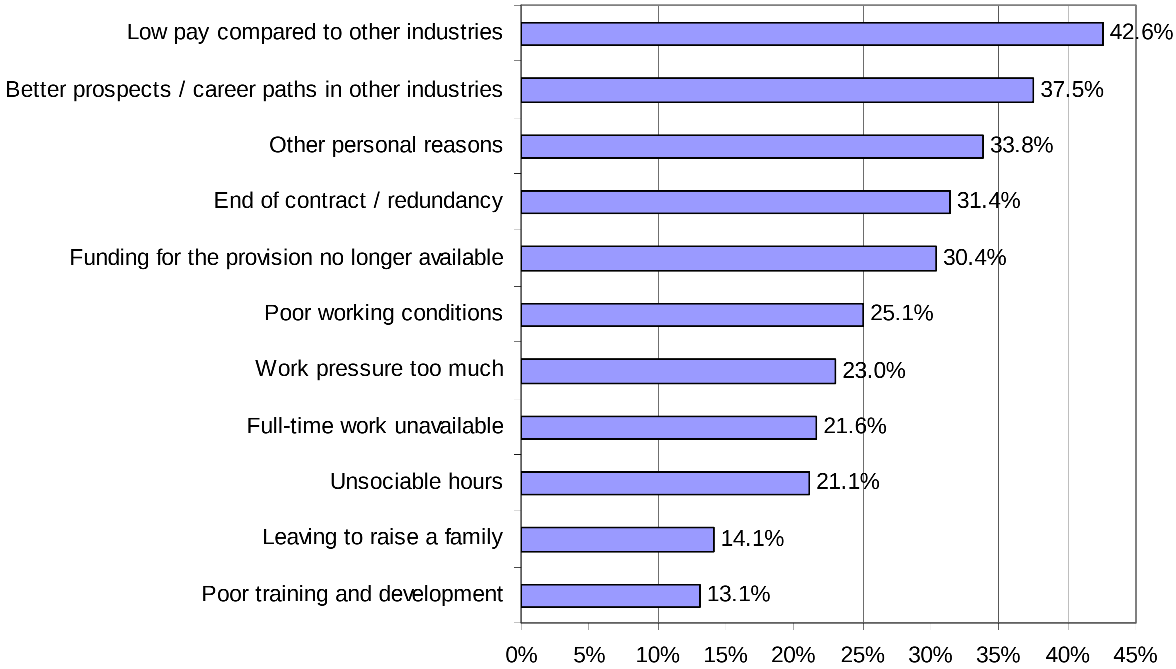
Playwork Employees, 2007

Two in five employees (42.6%) would leave the sector because of low pay compared to other industries, while 37.5% would leave for better prospects or career paths in other industries.

Three in ten employees (31.4%) would leave the sector because of the end of a contract/redundancy or because funding for the provision is no longer available (30.4%). It is important to note that the structure of the sector, where settings or play schemes are dependent on project-based funding, has a negative effect on employees’ perceptions of job security.

Poor training and development is the factor least likely to make employees leave the play sector, although it was still mentioned by 13.1% of respondents, suggesting that there is room for improvement in terms of continuing professional development. It should also be noted that this question may be affected by other drivers such as the expectations of respondents who do not expect, or perhaps want, training and development opportunities.

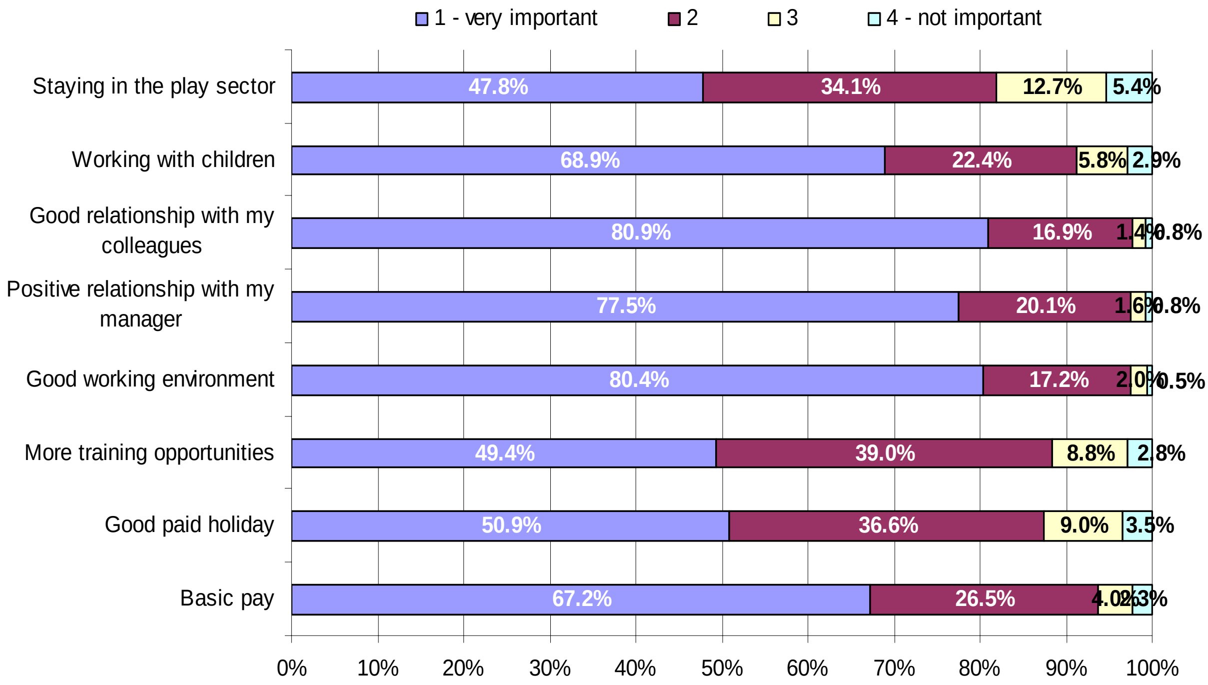
Diagram 2.5(b) What factors, if any, would make you leave the play sector?



Playwork Employees, 2007

When asked what factors were important to them when it comes to choosing their next job, 80.9% of respondents said that "a good relationship with my colleagues" is very important compared to less than 1% who attached no importance to this factor at all. Linked to this is a good working environment, which came a very close second with 80.4% considering it very important when choosing their next job. Working with children was more important to respondents than necessarily staying in the play sector, with 68.9% stating that working with children is very important compared to 47.8% saying working in the play sector is very important.

Diagram 2.5(c) How important are the following factors to you in choosing your next job?



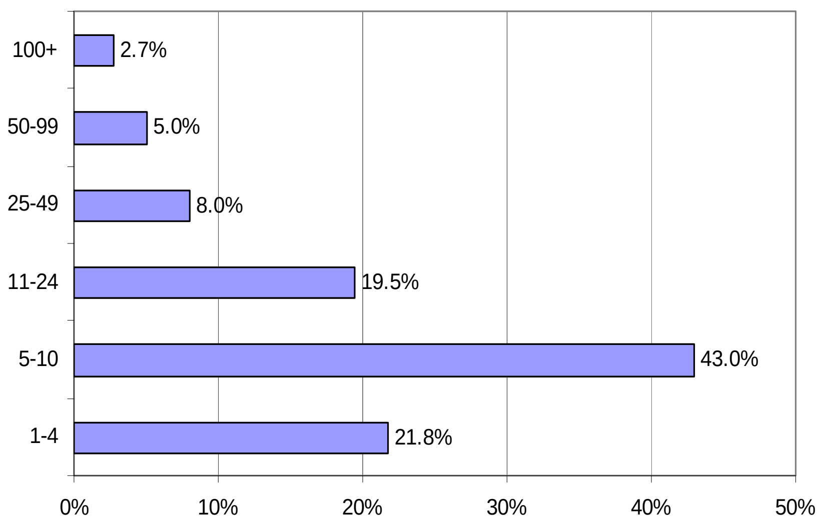
Playwork Employees, 2007

3. CHARACTERISTICS OF PLAYWORK ORGANISATIONS

3.1 Size of play provision

Play settings can usually be described as micro-organisations employing ten or fewer people. Nearly two-thirds (64.8%) of employers responding to the Playwork People survey stated that they employed ten or fewer full-time, part-time, paid or unpaid staff.

Diagram 3.1(a) Size of organisation

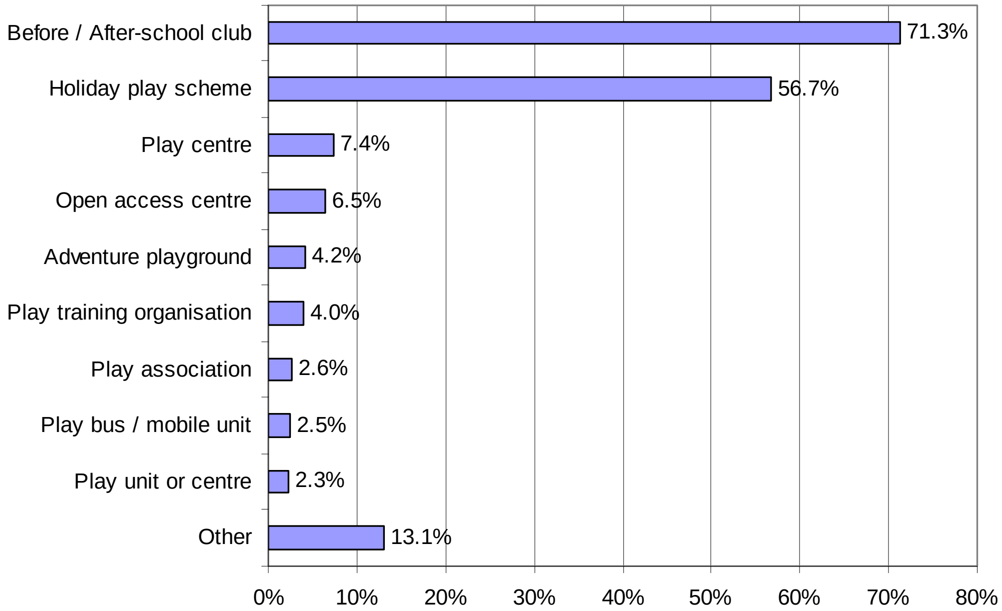


Base: Playwork Employers, 2007

3.2 Type and location of provision

Play happens anywhere and playworkers are employed in a broad range of settings. However, most staffed play provision is out-of-school clubs and/or holiday play schemes, with 71.3% of employers running before-/after-school clubs and 56.7% holiday play schemes. 57.2% of employers who run out-of-school clubs also run holiday play schemes, providing year-round provision for children and employment for staff.

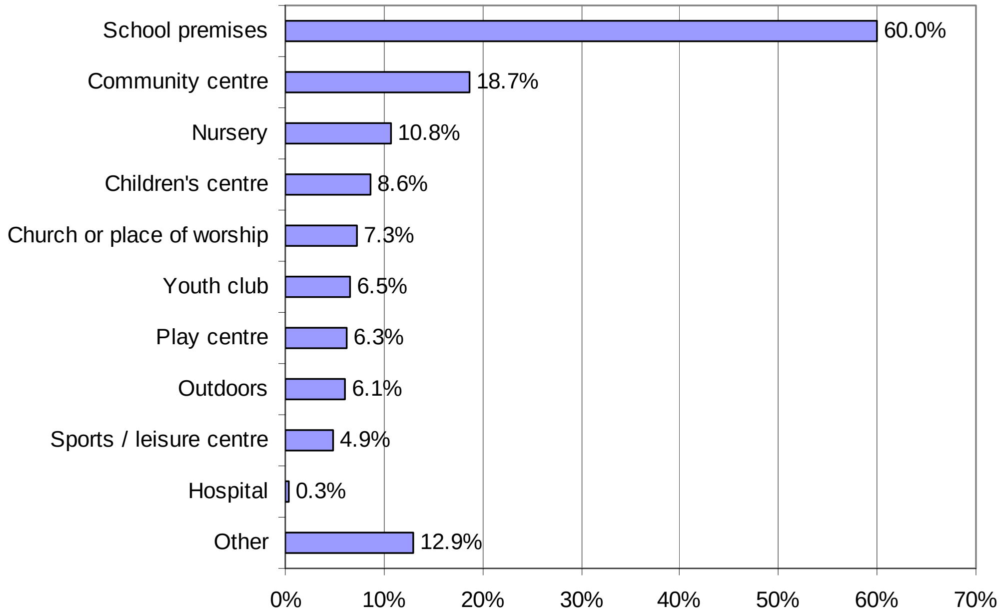
Diagram 3.2(a) Type of play provision run by employers



Base: Playwork Employers, 2007

As might be expected from the chart above, the majority of play settings (three out of five) are located on school premises.

Diagram 3.2(b) Type of location of play provision



Base: Playwork Employers, 2007

Playworkers are fairly evenly spread across the voluntary, public and private sectors and the data collected in 2007 is in line with that collected in 2005. Just over a third (34.1%) of respondents stated that they work for a voluntary organisation or charity and nearly a third for an organisation run by a local authority (30.9%) or a private business (28.4%). In London, 61% stated that they work for a local authority, well above the English average:

Table 3.2(a) Type of organisation where employees work

How would you describe the organisation that you work for?

	2005 %	2007 %
Voluntary organisation or charity	32.2%	34.1%
Organisation run by a local authority	25.2%	30.9%
Private business	32.0%	28.4%
Other	9.6%	7.5%

multiple choice, does not sum to 100%
Base: Playwork Employees, 2005 & 2007

Two-thirds of play settings operate in a town or city (66.0%), whilst nearly one quarter (23.7%) are run in a village or rural setting and the remainder cover both locations. Compared to 2005, there appears to be a shift towards settings operating in both rural and urban locations.

Table 3.2(b) Type of area where play provision is located

Does your organisation operate in...

	2005 %	2007 %
A town or city	64.8%	66.0%
A village or other rural place	30.6%	23.7%
Both	4.6%	10.3%
Total	100%	100%

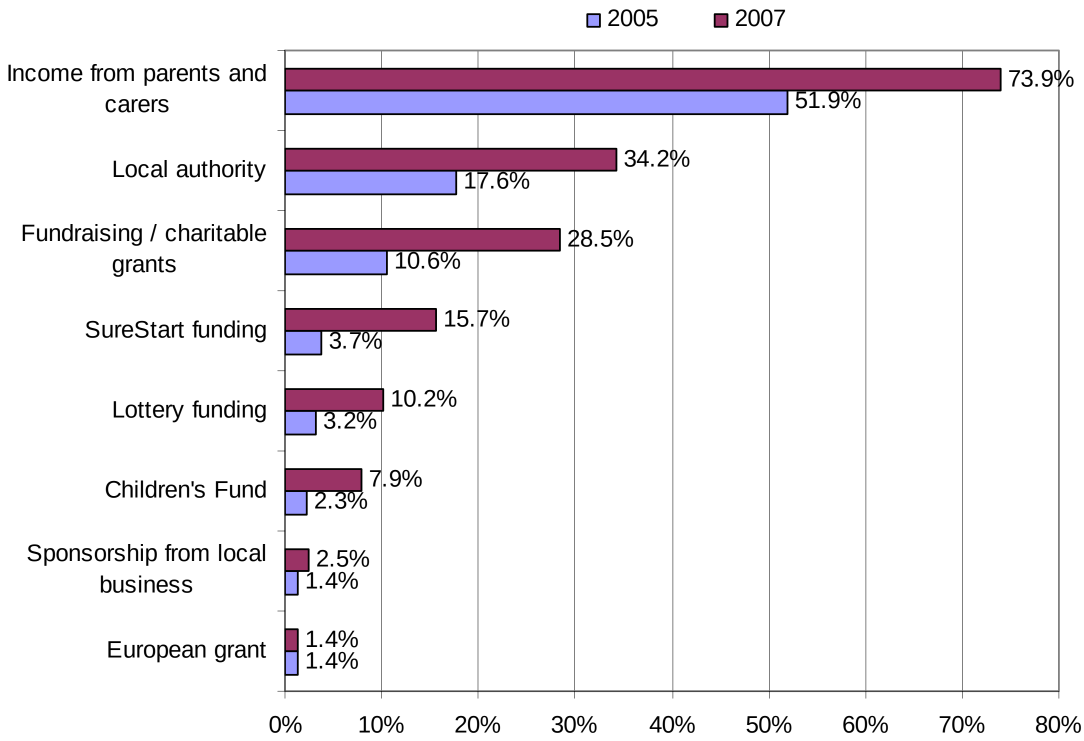
Base: Playwork Employers, 2007

3.3 Funding

Playwork organisations rely on a combination of income sources. Income from parents and carers is often used to supplement funding from other sources. Nearly three-quarters of employers (73.9%) stated that this source of funding had contributed to the financing of their setting, compared to just over half (52%) in 2005.

We know that maintaining financial stability is frequently a challenge for play settings and many are reliant on time-specific or project-related funding.

Diagram 3.3(a) Funding structure of playwork provision



Playwork Employers, 2005 & 2007

3.4 Organisation aim or purpose

17.5% of play settings stated that they work especially with children who have disabilities.

Other organisational aims (stated in response to an open-ended question) focused around providing quality, low-cost childcare, promoting children's play or responding to specific local needs. Although the responses are too varied to collate into reliable statistics, some illustrative quotes are given below as examples:

> *"After school only - we aim to offer a safe, friendly, happy homely environment for primary-age children, after a heavily structured day in the classroom".*

> *"Our aim is to meet the Every Child Matters outcomes ensuring all children have fun in a safe environment".*

> *"Our aim is to provide quality, affordable wraparound childcare for the parents/carers whose children attend the primary school we are situated on".*

Some organisations providing play had very specific aims, depending on their setting, location or type of business, for example:

> *"All of our provision is fully integrated working with hard-to-reach and economically deprived areas".*

> *"Children whose parents have become homeless and are living in temporary accommodation".*
>
> *"Limited Spaces, takes referrals from social care, locality team schools etc. for young people who are at risk, in need or deemed to need extra input".*

3.5 Prospects for play provision

Employers were asked to describe the prospects for their play provision over the next three years. 67.1% of employers in 2007 described the prospects for their play provision as optimistic, compared to 53% in 2005. Employers described the biggest challenges to their play provision as:

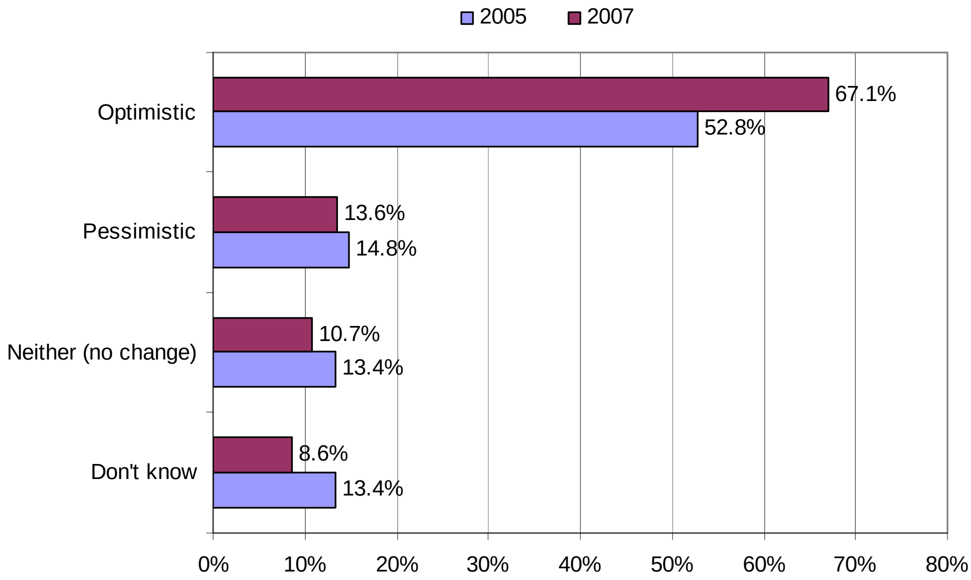
Funding - Respondents described a lack of funding as creating insecurity in terms of the long-term future of their play provision, but also in terms of employment and job security. Key challenges were: maintaining funding, creating sustainability for provision through continued funding and fundraising through applying for grants.

Staff – Respondents have difficulty finding and retaining staff at all levels with the appropriate qualifications, especially to meet Ofsted standards. Maintaining the number of volunteers in voluntary management committees was also seen as a key challenge in this area.

Premises/equipment - Respondents felt that premises or equipment were going to be a big challenge for them over the next three years. A lot of comments focused on the need to move premises or to renew worn equipment as well as the challenges of inadequate or shared premises.

Government policy - This is seen as a big challenge over the next three years. Every Child Matters, the Common Core of Skills and Knowledge and the Extended Schools Service agenda were mentioned by respondents.

Diagram 3.5(a) Prospects for play provision over the next three years

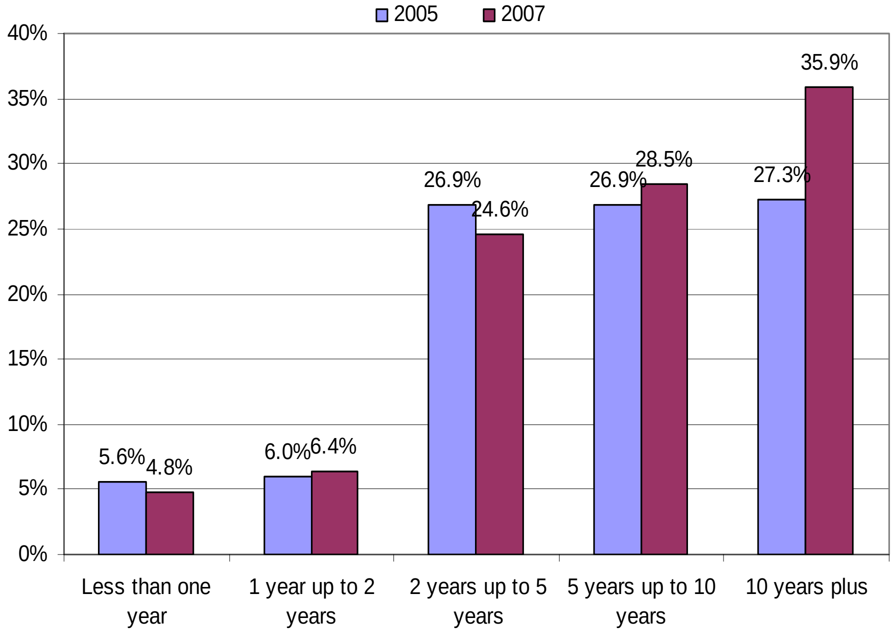


Playwork Employers, 2005 & 2007

3.6 Sustainability

In 2005 and 2007 the largest proportion of play settings had been running for ten years or more. There appears to be more well-established play organisations that have been operating for over ten years, than there are new organisations starting up. It is however possible that fewer new organisations completed the questionnaire because they do not yet exist on known databases.

Diagram 3.6(a) Number of years that play provision has been running



Playwork Employers, 2005 & 2007

4. SKILLS, QUALIFICATIONS AND TRAINING

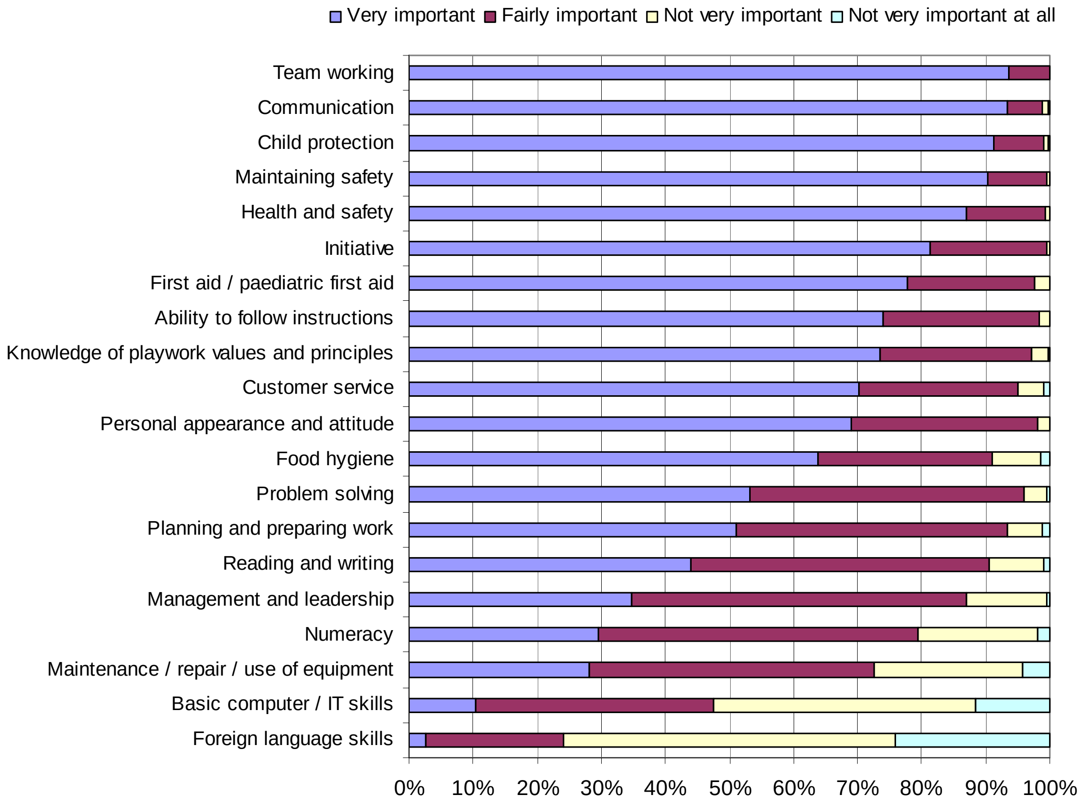
4.1 Skills

Overall, team working and communication were perceived by employers to be the most important skills for the play sector. 100% of employers stated that team working is 'very important' or 'fairly important' and 99% believe communication skills are 'very important' or 'fairly important'. The need to work as part of a team, communicate with parents, children and funders and maintain safety appears to be of more importance to the sector than more academic skills such as reading, writing and numeracy.

As might be expected, child protection, maintaining safety and health and safety are accepted as being very important in the sector. Arguably, all three of these skill areas are closely linked and require some degree of formal training and are obviously important in a sector that has to meet regulatory requirements for the care of children.

Relatively low importance is given to foreign languages and basic computer/IT skills by employers in the sector. 75.3% of employers said that foreign language skills were 'not very important' or 'not very important at all', whilst 52.4% feel that basic computer skills are 'not very important' or 'not very important at all'. The demand for foreign language skills differs regionally, probably as a consequence of the make-up of the local community. For example, 41% of employers in London rated foreign languages as 'fairly important' and as shown in Section 1, London has the most diverse playwork workforce. The importance of particular skills is also likely to differ depending on occupation. Computer/IT skills, for example, may have higher demand in management and supervisory roles for marketing, fundraising and budget control, rather than face-to-face playwork roles.

Diagram 4.1(a) Importance of specific skills to playwork employers



Playwork Employers 2007

Table 4.1(a) Importance of specific skills to playwork employers

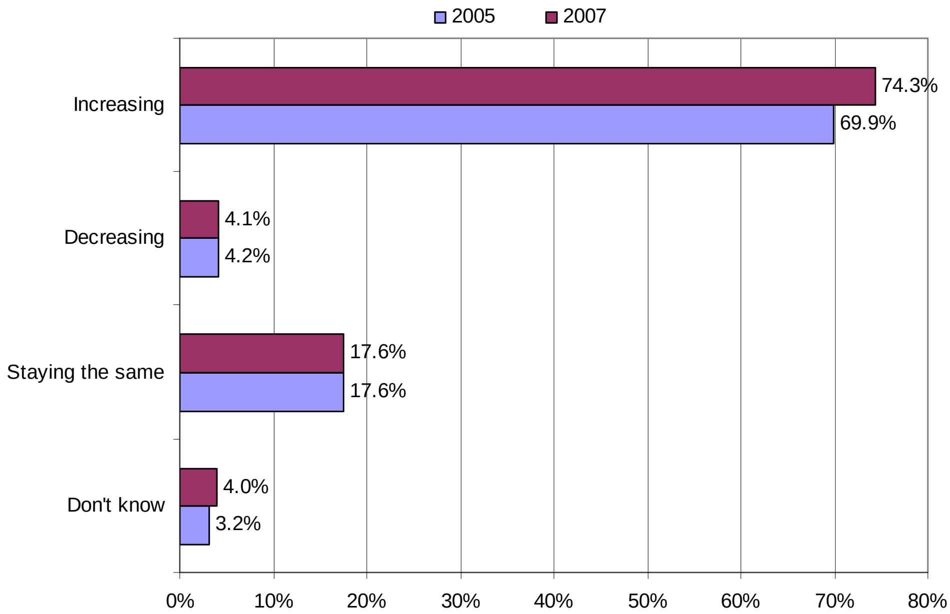
Thinking of your playwork staff, how important are the following skills?

	Very important %	Fairly important %	Not very important %	Not very important at all %
Team working	93.6%	6.3%	0	0
Communication	93.4%	5.5%	0.9%	0.2%
Child protection	91.3%	7.8%	0.7%	0.2%
Maintaining safety	90.4%	9.1%	0.5%	0
Health and safety	86.9%	12.3%	0.7%	0
Initiative	81.3%	18.4%	0.4%	0
First aid / paediatric first aid	77.7%	19.9%	2.3%	0
Ability to follow instructions	74.0%	24.4%	1.6%	0
Knowledge of playwork values and principles	73.5%	23.7%	2.7%	0.2%
Customer service	70.3%	24.9%	4.0%	0.9%
Personal appearance and attitude	69.1%	29.2%	1.8%	0
Food hygiene	63.8%	27.1%	7.5%	1.4%
Problem solving	53.1%	42.8%	3.6%	0.5%
Planning and preparing work	51.1%	42.3%	5.6%	1.1%
Reading and writing	43.9%	46.6%	8.6%	0.9%
Management and leadership	34.7%	52.0%	12.4%	0.5%
Numeracy	29.5%	50.0%	18.5%	2.0%
Maintenance / repair / use of equipment	28.1%	44.2%	23.0%	4.3%
Basic computer / IT skills	10.3%	37.0%	40.8%	11.6%
Foreign language skills	2.5%	21.3%	51.5%	23.8%

Base: Playwork Employers 2007

In 2007, nearly three-quarters (74.3%) of playwork employers thought that the level of skill needed to do playwork jobs is increasing. Overall, employers' perception of the level of skill needed in the playwork workforce has changed little since 2005. 70.7% of employers who believe that the level of skill needed in their workforce is increasing said that new legislation or regulatory requirements had impacted on the level of skill needed in the last three years.

Diagram 4.1(b) Playwork employers' view on the level of skill needed in the playwork workforce



Playwork Employers, 2005 & 2007

In 2005 and 2007 employers were most likely to say that "new legislation or regulatory requirements" or "government policy, initiatives or new funding" had affected the skills that they need in their workforce over the last three years. This perhaps points towards recent changes in the sector and the significant impact of the Extended Schools Service and Every Child Matters.

The 2007 employer survey also allows us to measure the impact of short-term or project-based funding on play settings and see the effect it has on skills, with over a third (36.7%) of employers stating that the need to generate their own funding has affected the skills they need over the last three years. This factor has a big impact on all types of play setting, with play units, play centres and play training organisations stating that they are the most affected. 'New legislation or regulatory requirements' appears to have the biggest impact on holiday play schemes, while 'government policy/initiatives/new funding' and 'the expectations of children/parents/carers' appear to affect the skills needs of adventure playgrounds the most.

Table 4.1(b) Factors affecting employers' skill needs in the past three years

Over the last three years (or for the period you have been running, if less than three years), have any of the following affected the skills you need?

	2005 %	2007 %
New legislation or regulatory requirements	36.3%	64.3%
Government policy/initiatives/new funding	24.2%	39.5%
The need to generate our own funding	*	36.7%
The expectations of children and parents/carers	14.4%	32.3%
Insurance/codes of practice/warranty issues	9.8%	13.6%
The addition of new facilities the last 2-3 years	5.1%	13.4%
Difficulties meeting required quality standards	9.3%	12.1%
New IT facilities	7.0%	9.6%
Skills needs have not really changed	6.0%	8.3%

Base: Playwork Employers, 2005 & 2007
* Not asked in the 2005 survey of employers but this option was added in 2007 in response to the open ended 'other' responses given in 2005 where generating funding was a key issue.

Employers had the opportunity to add other reasons on their returned questionnaire. Several used this space to talk about the fact that the expectations children have of playworkers' skills are key because children now contribute to the recruitment and running of their play setting. There were also a number of comments relating to difficulties with regulatory requirements as currently managed by Ofsted:

> *"A challenge we find is Ofsted will accept workers with Early Years qualifications and therefore workers are not encouraged to get playwork qualifications."*
>
> *"The expectations children have of experienced playworkers as they contribute to recruitment processes and the running of the club".*
>
> *"Confusion with the introduction of CCPD and lack of localised NVQ assessors".*
>
> *"Tight staffing ratios mean workers have to train in their own time as no staff cover is available".*
>
> *"Increase in children who need specific 1:1 support".*

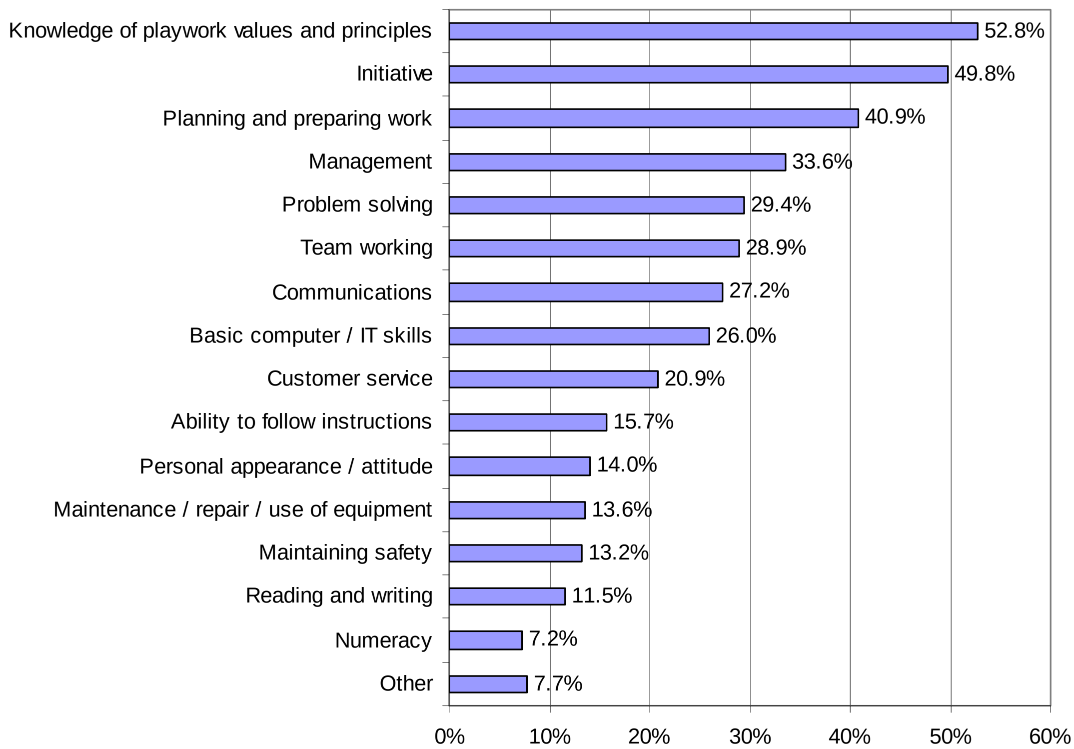
4.2 Skills gaps

Skills gaps exist when members of the existing workforce are thought to have lower skills than are necessary to meet business or industry objectives, in other words when employers regard some of their staff as not being fully proficient to meet the requirements of their job.

Nearly half of all playwork employers are experiencing a skills gap in their current workforce (48%). This is even higher than the 29.2% of employers who identified a skills gap in their workforce in 2005 and suggests that this is a significant and ongoing problem for playwork employers.

These respondents identified a spread of skills lacking in their organisations, and key to this is ‘Knowledge of playwork values and principles’ which 52.8% of employers stated was lacking in their current workforce. Initiative (59.8%), planning and preparing work (40.9%) and management (33.6%) were other skills found lacking in the current workforce. When the survey was last conducted in 2005, employers were not asked about knowledge of playwork values and principles, but the three skills most likely to be lacking from the workforce in 2005 also included planning and preparing work and initiative as well as team working.

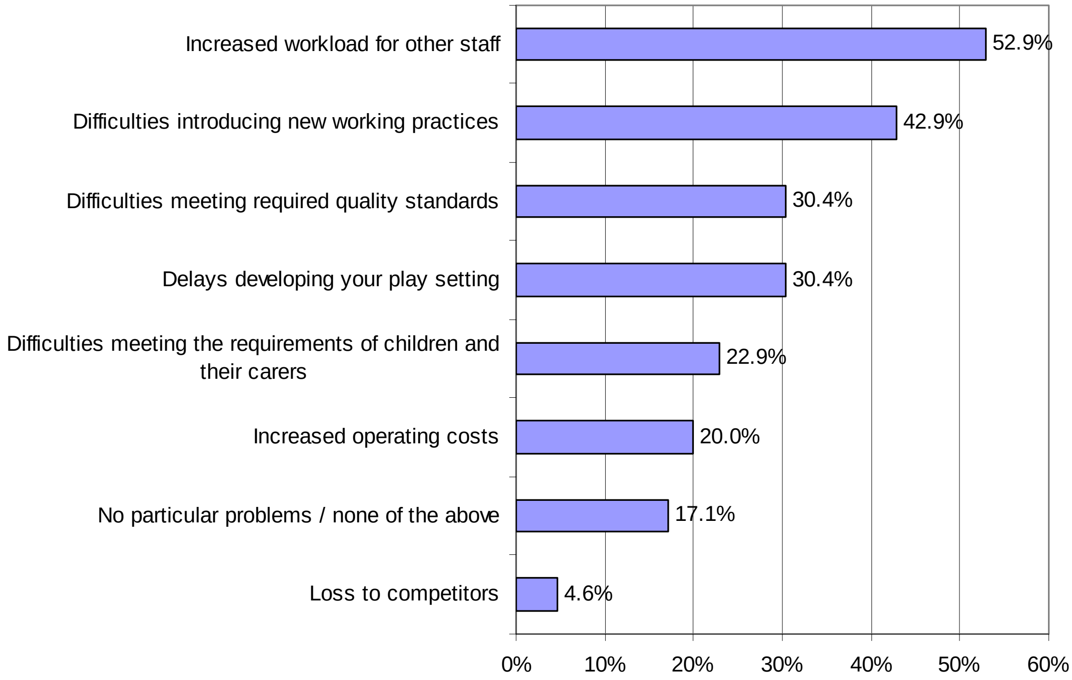
Diagram 4.2(a) Skills gaps experienced



Playwork Employers, 2007

The biggest impact of skills gaps on play provision is an increased workload for other staff (52.9%). Skills gaps also impact on one in four organisations by delaying employers from introducing new working practices (42.9%).

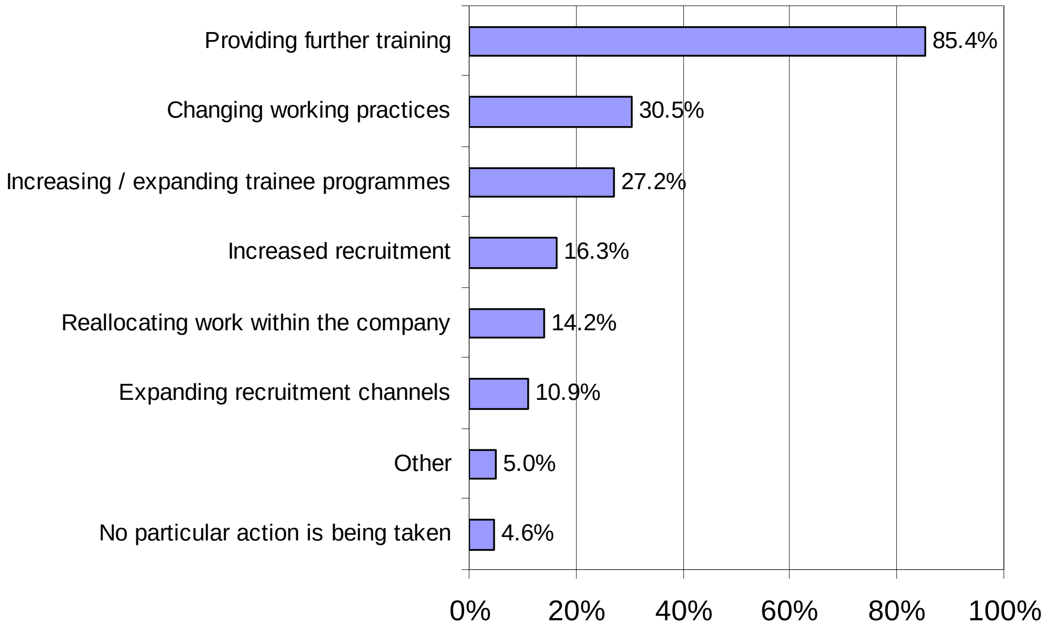
Diagram 4.2(b) Effect of skills gaps on organisations over the last three years



Playwork Employers, 2007

To counter the impact of skills gaps playwork employers are most likely to provide further training for their workforce (85.4%). Only 4.6% of employers would take no action at all.

Diagram 4.2(c) Action taken by playwork organisations to overcome skills gaps



Playwork Employers, 2007

Research shows that although new recruits are skilled, many do not have the skills required for the playwork jobs they are applying for. This is often because the qualifications they do have are not specific to playwork. Notably, four out of five employers (82.0%) find that new recruits are lacking in skills specific to playwork. .

Table 4.2(a) Types of skills employers have found lacking when recruiting

When recruiting for your play provision, what skills have you found lacking?	%
Skills specific to playwork	82.0%
Skills specific to your setting	19.6%
Generic skills like team working, communications or numeracy	25.6%

Playwork Employers, 2007

Where employers had detailed "other specific skills required" most talked about a lack of level 3 qualified playwork staff available to meet the needs of their setting. Other skills mentioned were specialist or specific to the setting, for example:

> *"Knowledge of hospital play services".*
>
> *"Not many applicants have worked in an open access setting and some find this difficult to imagine".*
>
> *"Drugs awareness, anger management, older and young people 13-17 years".*

4.3 Qualifications

Respondents were asked to indicate the highest level of qualification which they hold. The majority of respondents hold a level 3 qualification and 80.1% of these level 3 qualifications are in playwork. 31% of the playwork workforce hold a level 4 or 5 qualification whilst 20.3% hold a level 2. 2.8% of the sector stated that they hold no qualifications at all.

Table 4.3(a) Highest level of education

What is your HIGHEST level of education?

	Count	%
Level 2	242	20.3%
Level 3	549	46.0%
Level 4	319	26.7%
Level 5	51	4.3%
None	33	2.8%
Sub-total	1,194	100.0%
Unclassified	101	
Total	1,295	

Playwork Employees, 2007

There is a range of nationally recognised qualifications in playwork, including taught playwork courses and work-based learning. Respondents were asked to choose from a list of playwork qualifications which ones they currently hold and which ones they are working towards. Respondents could indicate all those playwork qualifications that they hold, not just the highest. Most respondents currently hold or are working towards a NVQ Level 3 in playwork.

Table 4.3(b) Playwork qualifications currently held and being worked towards

What qualifications do you have in PLAYWORK or are you currently working towards?	*Currently hold*	*Working towards*
NVQ Level 2 in Playwork	25.6%	16.2%
Level 2 Certificate in Playwork	20.8%	10.9%
Level 2 Certificate in Supporting Playwork Practice	1.1%	0.6%
Level 2 Diploma in Playwork	2.6%	0.6%
NVQ Level 3 in Playwork	34.3%	31.6%
Level 3 Certificate in Playwork	7.5%	7.5%
Level 3 Diploma in Playwork	14.1%	13.1%
Level 3 Diploma in Supporting Playwork Practice	0.8%	0.6%
Level 3 Award in Playwork	2.3%	1.9%
Level 3 Certificate of Professional Development in Work with Children and Young People	2.4%	0.6%
Level 3 Certificate in Work with Children (APEL)	1.0%	0
Level 3 Award in Playwork for Early Years and Child Care Workers	4.1%	2.2%
Level 3 Award in Early Years and Child Care for Playworkers	3.9%	2.2%
NVQ Level 4 in Playwork	1.4%	3.1%
NVQ Level 4 Early Years, Care and Education	3.4%	4.4%
Playwork Foundation Degree	2.3%	6.3%
BA Honours Playwork	3.4%	4.7%

Playwork Employees, 2007

Playwork qualifications start at level 2 on the National Qualifications Framework and go up to level 4 and beyond. The table above has been used to calculate the highest playwork qualification held for each respondent. For the majority of respondents the highest playwork qualification they hold is a level 3 (29.6%), whilst for 13.3% level 2 is their highest playwork qualification and for 4.7% it's level 4 or above. Over half of employees (52.4%) hold no playwork-specific qualification at all.

Table 4.3(c) Highest level of playwork specific qualification held

Highest Playwork Qualification	n	%
Level 2 playwork qualification	172	13.3%
Level 3 playwork qualification	383	29.6%
Level 4 or above, playwork qualification	61	4.7%
No playwork qualification	679	52.4%
Total	1,295	100.0%

Playwork Employees, 2007

In an open-ended question respondents were asked if they had any other qualifications that they considered to be relevant to their job. Ten or more respondents said they held the following:

- Diploma in Childcare and Education
- PGCE or teaching degree
- Diploma in Pre-School Practice
- NNEB (diploma in nursery nursing).

4.4 Training

According to employers, 49.3% of all employees received some form of training (including informal in-house training) in the last 12 months. This shows a slight increase from 2005 where 42.4% of employees received training in the year prior to the survey.

Nearly 10% of playwork organisations do not spend anything on training, which has obvious implications for the skills and professional development of their workforce (unless these organisations are accessing free training). The majority of organisations (28.0%) spent between £100 and £499 on training in the past 12 months.

Table 4.4(a) Amount spent by playwork organisations on training in the last 12 months

How much has you organisation spent on training in the last 12 months?	
Nothing	9.6%
Under £100	14.2%
£100 - £499	28.0%
£500 - £999	11.6%
£1,000 - £4,999	13.5%
£5,000 - £9,999	2.8%
Over £10,000	2.2%
Don't know	18.1%

Playwork Employers, 2007

In the last 12 months, workers in the playwork sector are most likely to have undertaken training in first aid, child protection, food hygiene and health and safety.

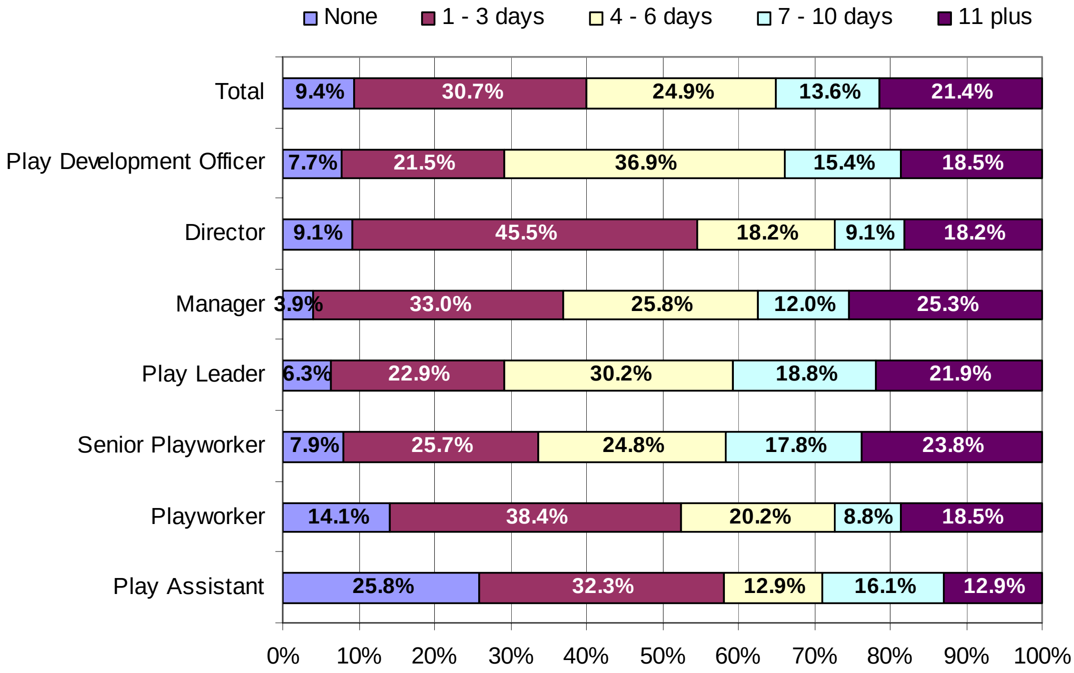
Table 4.4(b) Main types of training undertaken by playworkers in the last 12 months

Type of training	%
First Aid/Paediatric First Aid	78.3%
Child Protection	73.4%
Food Hygiene	47.6%
Health and Safety	46.6%

Playwork Employees, 2007

30.7% of playworkers received between one and three days training in the last 12 months. Play assistants were least likely to have received any training in the last 12 months but this may be because it is an entry-level position and they are yet to receive training.

Diagram 4.4(a) Number of training and continuing professional development days undertaken in the last 12 months by occupation



Playwork Employees, 2007

Respondents were asked whether they thought that they had received adequate training in order to do their job. Positively, nine out of ten respondents (91.1%) believes that they have. Volunteers are least likely to consider that they have had adequate training with 18.2% of volunteers stating that they had not received adequate training to do their job.

Table 4.4(c) Perception of adequate training received by job type

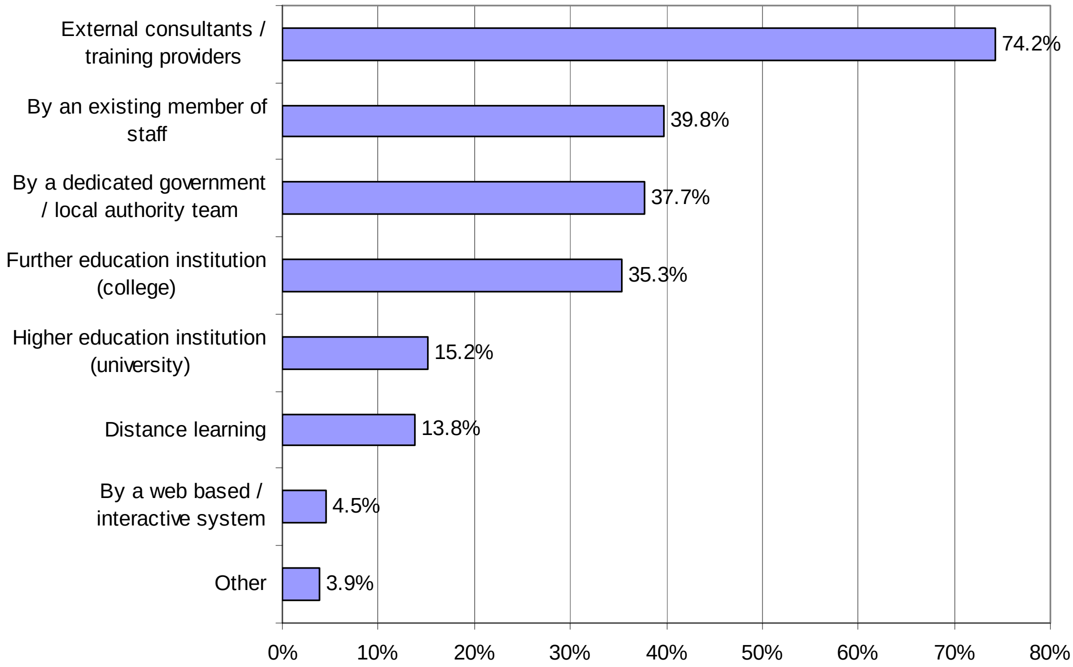
Overall do you consider that you have been given adequate training to do your job?

	Paid worker	Volunteer	Both	Total
Yes	91.4%	81.8%	88.9%	91.1%
No	8.6%	18.2%	11.1%	8.9%
Total	100%	100%	100%	100%

Playwork Employees, 2007

According to employers a large proportion of training is delivered by external consultants or training providers (74.2%). Nearly two-fifths (39.8%) is delivered by an existing member of staff and 37.7% by a dedicated government/local authority team.

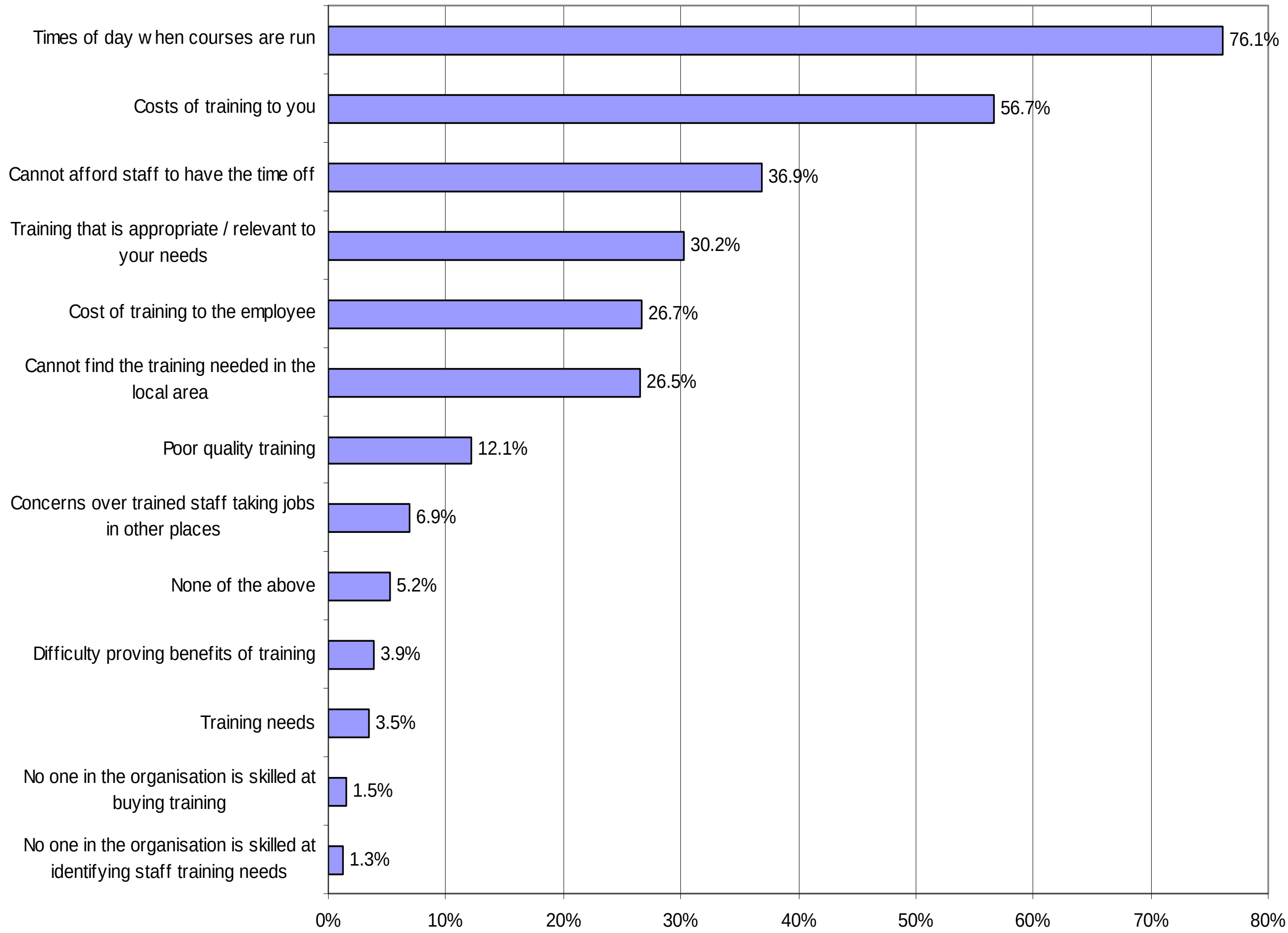
Diagram 4.4(b) Methods of training delivery



Playwork Employers 2007

One of the biggest factors limiting the provision of training is the time of day when courses are run. Over three-quarters (76.1%) of employers cited this factor as a barrier to the amount of training provided for their staff. Many playworkers work part time, often around family commitments, and as a consequence find training courses difficult to attend. They mean an additional time commitment and as play settings are generally micro-businesses employers have difficulty in giving members of staff time off to attend training during their normal working hours and still meet statutory staff/child ratios. The cost of training to employers also presents a barrier for 56.7% of employers. Voluntary play organisations or charities are most likely to find the cost of training is a barrier whilst private businesses are most likely to find the time of day when courses are run a barrier.

Diagram 4.4(c) Barriers limiting the amount of training employers provide for staff



Playwork Employees, 2007

5. RECRUITMENT AND VACANCIES

5.1 Vacancies

In total 743 vacancies were reported in the last 12 months by the 573 employers responding to the Playwork People Survey 2007. This equates to 34.8% of all employment being vacancies in 2007, which is slightly higher than the 29.7% reported in the previous Playwork People survey. Nearly two in five (38.5%) of vacancies were described by employers as hard to fill, which again is a larger proportion than in 2005, suggesting that hard-to-fill vacancies are a significant problem for the sector.

Table 5.1(a) Vacancies and hard to fill vacancies

	2005	2007
Vacancies as a percentage of all employment	29.7%	34.8%
Hard-to fill-vacancies as a percentage of all vacancies	32.6%	38.5%
Hard-to-fill vacancies as a percentage of all employment		13.4%

Playwork Employers, 2005 & 2007

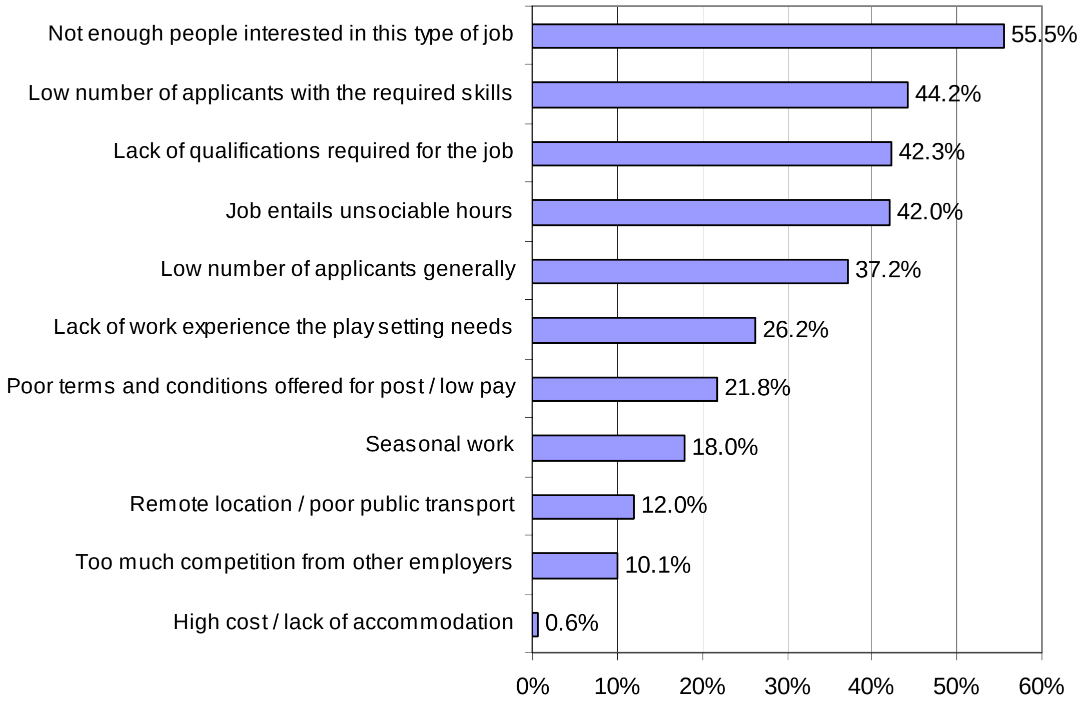
5.2 Skills shortages

Skills shortages occur when businesses cannot recruit enough people who are appropriately qualified, skilled or experienced. Skills shortages are deemed to exist when employers have a vacancy which they are finding hard to fill and the reasons for it being hard to fill are related to shortcomings in the skills, qualifications or experience of applicants.

Employers who had experienced a hard-to-fill vacancy in the previous 12 months were asked why these vacancies were hard to fill. The three skills shortage reasons for hard-to-fill vacancies (low number of applicants with the required skills, lack of qualifications required for the job and lack of work experience the play setting needs) featured prominently in the main factors given by employers.

The two most likely reasons for hard-to-fill vacancies are "not enough people interested in this type of job" (55.5% of employers experiencing a hard-to-fill vacancy) and "low number of applicants with the required skills" (44.2%) pointing towards a lack of awareness of playwork as a profession or poor pay and conditions acting as a disincentive to apply for playwork roles as well as not enough appropriately qualified people applying for roles in playwork.

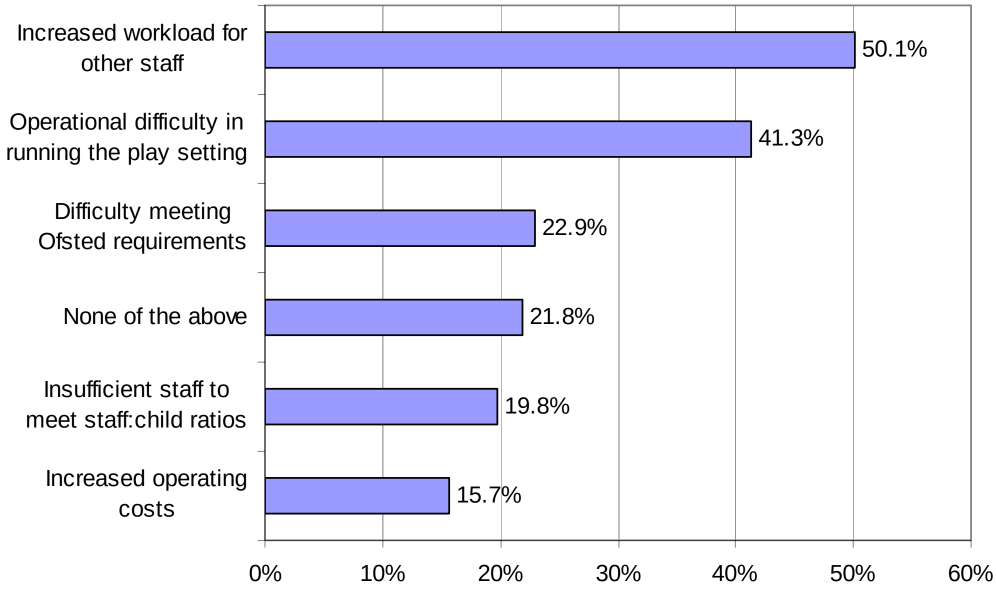
Diagram 5.2(a) Reasons why vacancies have been hard to fill



Playwork Employers 2007

It is important to understand the impact that hard-to-fill vacancies have on playwork organisations. The most frequently cited implications are an increased workload for other staff (50.1%) suggesting that other staff take on the duties and workload of those unfilled roles.

Diagram 5.2(b) Impact of hard-to-fill vacancies on employers



Playwork Employers 2007