



Ministry of Education  
Te Tāhuhu o te Mātauranga

# EARLY CHILDHOOD EDUCATION FUNDING REVIEW

## Parents' Survey

January 2026



# Summary

## **The majority (77%) of parents / caregivers of ECE-aged children have at least one child enrolled in ECE**

Distinct patterns emerge among certain demographic groups; those who are unemployed (45%), single with children (32%), or with a low household income (30%) are more likely to not have their ECE-aged children attending ECE, indicating that socioeconomic factors play a critical role in ECE enrolment.

## **Cost is the #1 reason why children are not enrolled in ECE; has had a significant impact on parents / caregivers' career & workforce participation**

Among those with at least one child not enrolled in ECE, 35% selected cost as the main reason for their child(ren)'s not attending ECE, while 30% stated that they *prefer to stay home* and 25% *have someone who can look after their child(ren)*. Among parents / caregivers with a mix of children in ECE / not in ECE, 44% cited cost as the reason why not all their children are attending ECE.

Around half indicated that the *cost of ECE has impacted their work / career development* (53%), they *would increase their working hours if ECE was more affordable* (52%), and they *would have returned to work sooner if costs were lower* (50%). More than a third (37%) reported that the *cost of ECE has stopped them from going back to work / study*. These highlight the impact of ECE expenses on labour market participation and the potential economic and financial consequences for families.

## **However, positive impact of ECE on children's development & wellbeing almost universally acknowledged & recognised**

Most parents / caregivers with children in ECE (over 80%) believe ECE has had a positive impact on their children's learning, development, and wellbeing, while only 3% stated that ECE has not had a positive impact. *Learning social skills / how to interact with others* was most frequently cited as a positive outcome of attending ECE (32%).

## **Waitlists are a common experience; availability & operating hours a key concern**

For 1-in-4 parents / caregivers (26%) it was difficult to find an ECE service that *had available space when they needed it*, while 1 in 5 (19%) had difficulty finding an ECE service *that is open for the hours they need*.

Nearly half (46%) of parents / caregivers have been put on a waitlist, and among these, more than half (64%) *couldn't return to work / increase working hours when they wanted to* as a result. More than half (54%) of parents / caregivers on waitlist got a place for their child in ECE in 0–4 months; however, 8% had to wait for over a year.

Additionally, 38% of parents / caregivers indicated that in the last 2 years they had turned down work due to irregular hours / shift work that could not be covered by ECE.

## **Safety & quality of care top of mind when choosing an ECE service**

*How well their child(ren) is / are looked after / safety* (46%) was the most influential factor in deciding which ECE service to use, followed by the *environment* (34%) and *location convenience* (33%).

When envisioning their ideal ECE service, parents / caregivers prioritise a *caring, nurturing, and loving environment* (19%) alongside *safety and security* (15%).

## **Awareness of available financial support could be boosted**

Around half of parents / caregivers are confident that they are aware of all entitled ECE financial support (48%) and that they are receiving all the support they are entitled to (50%), compared to around a quarter who are not confident. While the vast majority (78%) of those who have applied to schemes like FamilyBoost found the application process easy, *lack of awareness* and *perceived ineligibility* are the top reasons behind people's not applying for it. Notably, Pacific peoples (67%) and Māori (47%) are significantly more likely to say that they haven't heard of FamilyBoost.

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# BACKGROUND & OBJECTIVES

# 01

# Background

A ministerial advisory group (MAG) was set up by the New Zealand Government to undertake a comprehensive review of early childhood education (ECE) funding. This review aims to ensure the ECE funding system is simple and fair and delivers value for money.

The MAG, alongside the Ministry of Education, commissioned research to collect input from key ECE stakeholders, specifically:

- Parents / caregivers
- ECE staff (including teachers and support staff)
- Businesses (employers)

# Objectives

The purpose of this research is to provide stakeholders' views and information on a range of topics, such as affordability, impact on the NZ workforce, access, funding complexity, and the impact of funding / regulation on the ECE workforce.

This report captures the views of **parents / caregivers** of ECE-aged children and their experiences with the current ECE system. This research explored ECE attendance, access, and decision-making; how ECE enables (or could better enable) parents / caregivers to work; parents / caregivers' awareness and understanding of subsidies and funding; and barriers to accessing ECE services.

In addition, data relating to household income, fees paid, and hours enrolled was also collected to assist the Ministry in future modelling.



## Methodology

**Survey method:** Online survey

**Length of interview:** 6–11 minutes

**Fieldwork period:** 21 November–8 December 2025

**Target:** Parents / primary caregivers of ECE-aged children

**Sample size:** n=800, comprising:  
n=618 parents / caregivers with child(ren) in ECE  
n=182 parents / caregivers with no children in ECE

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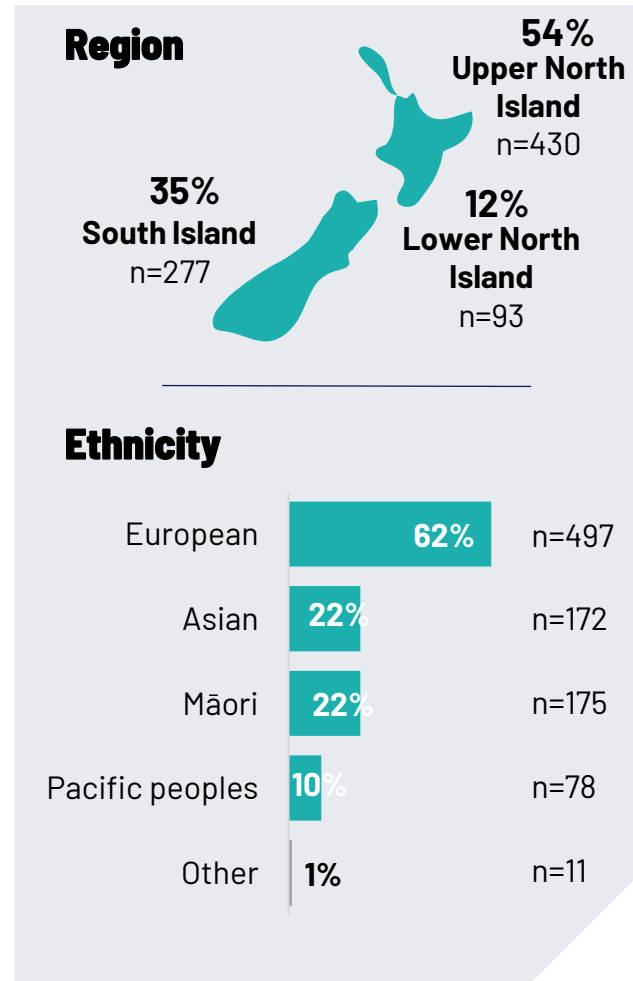
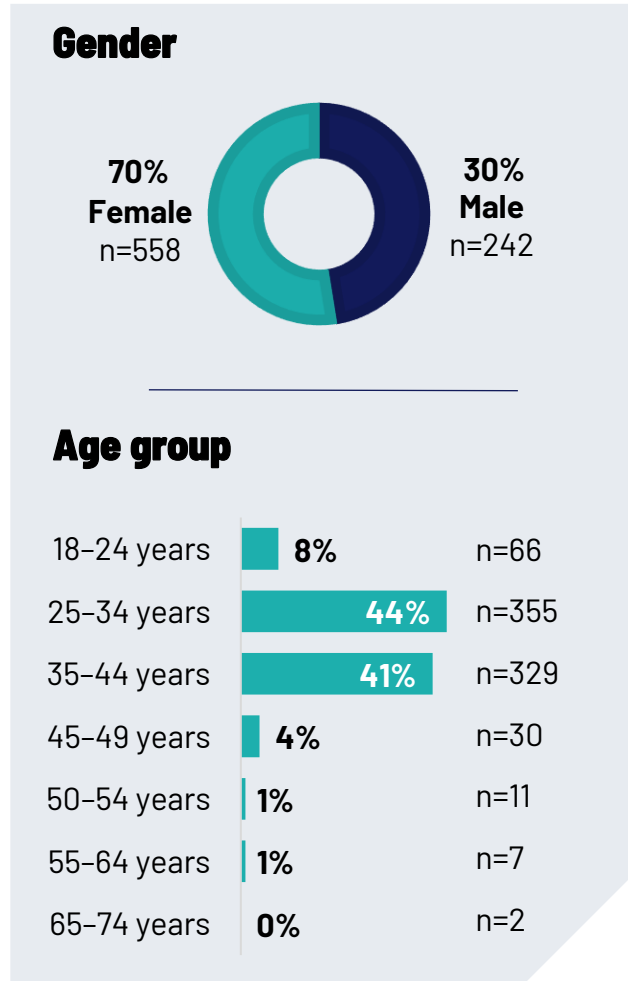
**Notes:** Significant differences are reported at 95% confidence. **Green** indicates that the percentage is significantly higher than the total, whilst **red** indicates it is significantly lower.

Where results do not sum to 100 or the 'difference' appears to be + / -1 more / less than the actual, this may be due to rounding, multiple responses, or the exclusion of 'don't know' or 'no response' answers.

The maximum margin of error, at the 95% confidence level, is  $\pm 3.5\%$ .

"NETT" (Net Total) represents a combined percentage of related response categories, used to simplify and highlight overall sentiment or direction in survey data.

# Sample profile

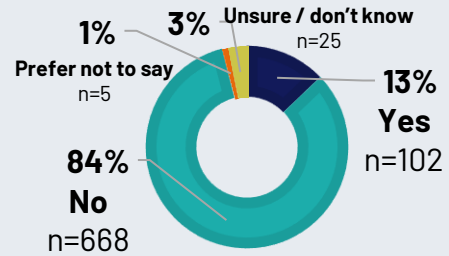


Northland	5%	n=41
Auckland	35%	n=281
Waikato	9%	n=75
Bay of Plenty	4%	n=33
Gisborne	1%	n=5
Hawke’s Bay	3%	n=21
Taranaki	2%	n=19
Manawatū-Whanganui	6%	n=48
Wellington	13%	n=102
Tasman	1%	n=7
Nelson	1%	n=5
Marlborough	1%	n=6
West Coast	1%	n=5
Canterbury	13%	n=104
Otago	4%	n=35
Southland	2%	n=13

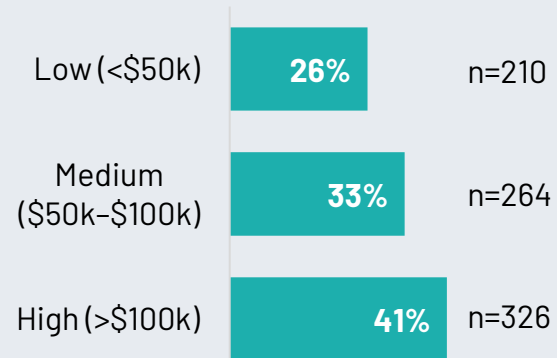
**Note on Ethnicity Data:** Participants were able to select all ethnic groups they identify with (multiple response). Therefore, percentages will sum to more than 100%.

# Sample profile

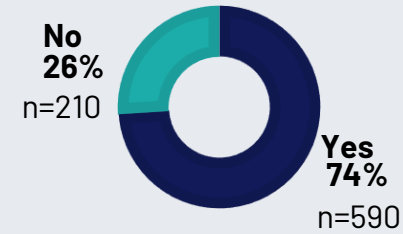
## Household with disability



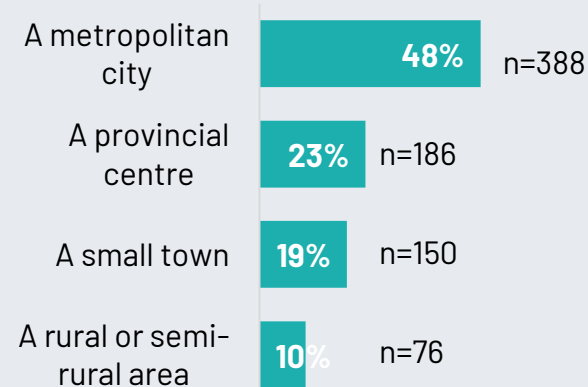
## Household income (HHI)



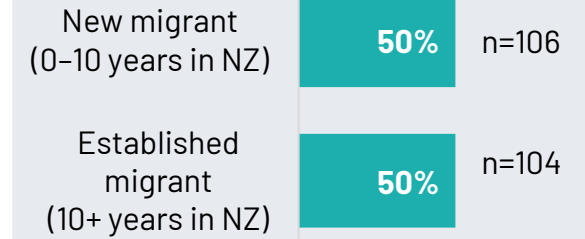
## Born in New Zealand



## Area Lived

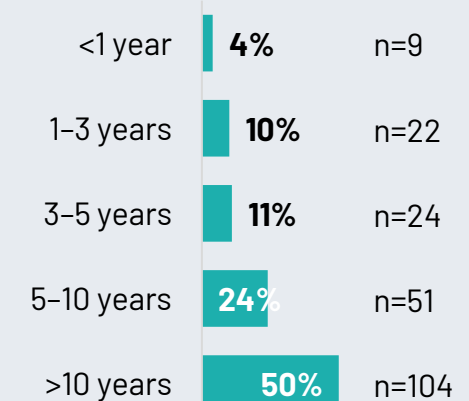


## Migrant groups



## Years lived in New Zealand

\*of those who were not born in NZ (n=210)

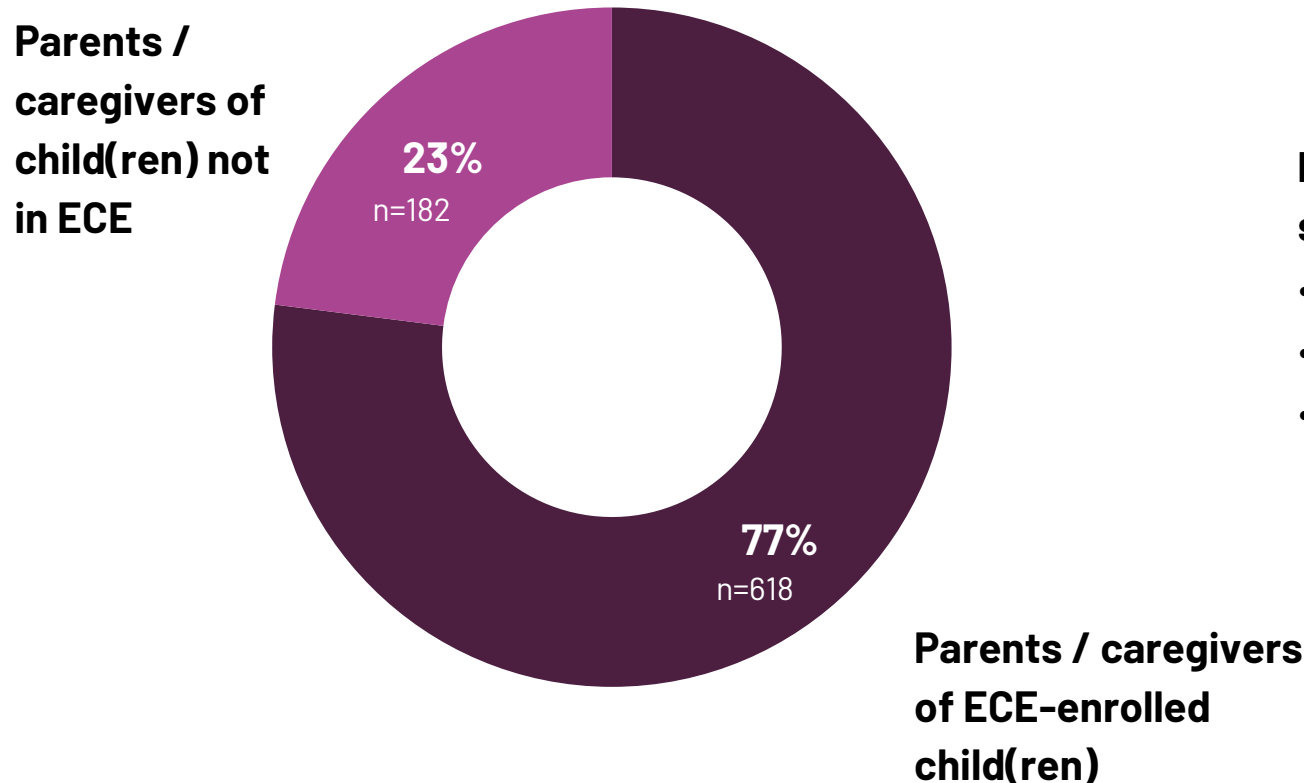


# CHILDREN IN ECE

# 02

# Children in ECE services

A significant majority (77%) of parents / caregivers surveyed have at least one child currently enrolled in ECE, while nearly a quarter (23%) have no children in ECE.



## Parents / caregivers with no children enrolled in ECE are significantly more likely to be...

- \*NETT Unemployed (45%)
- \*\*Single parent, living with child(ren) (32%)
- \*NETT Low Household Income (HHI) (<\$50k) (30%)

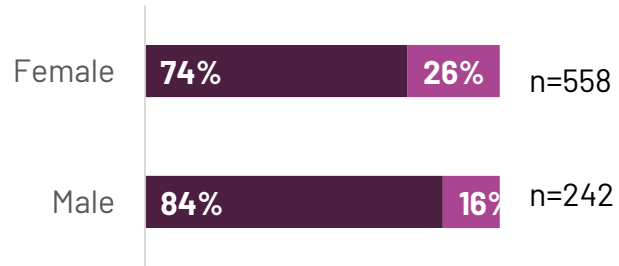
**Q33:** You indicated that you have [# NUMBER] child(ren) aged 5 years old or younger. Can you please tell us which of the following, if any, [CHILD #] is currently attending?

**Base:** Total sample (n=800). **Caution:** Low base size (n<100\*), (n<50\*\*).

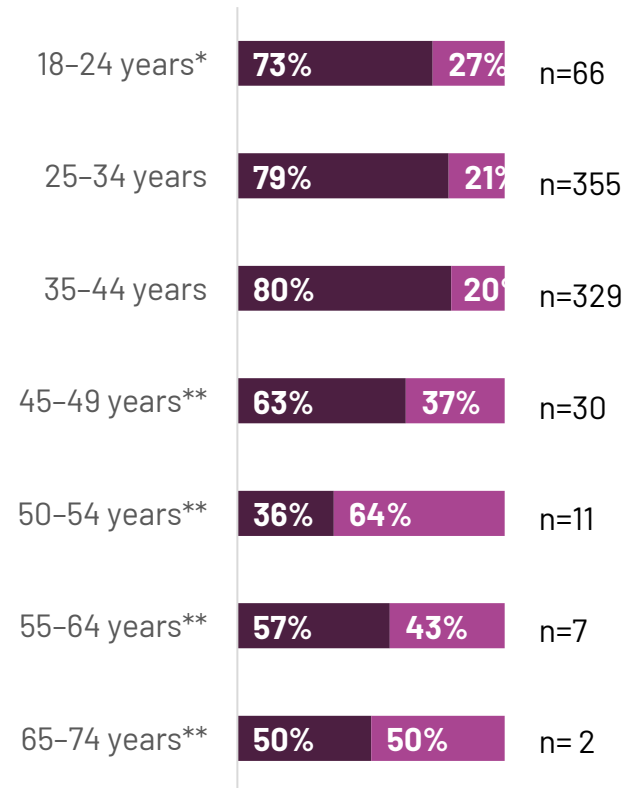
# Comparative demographic breakdown (i)

Parents / caregivers of ECE-enrolled child(ren)   
Parents / caregivers of child(ren) not in ECE 

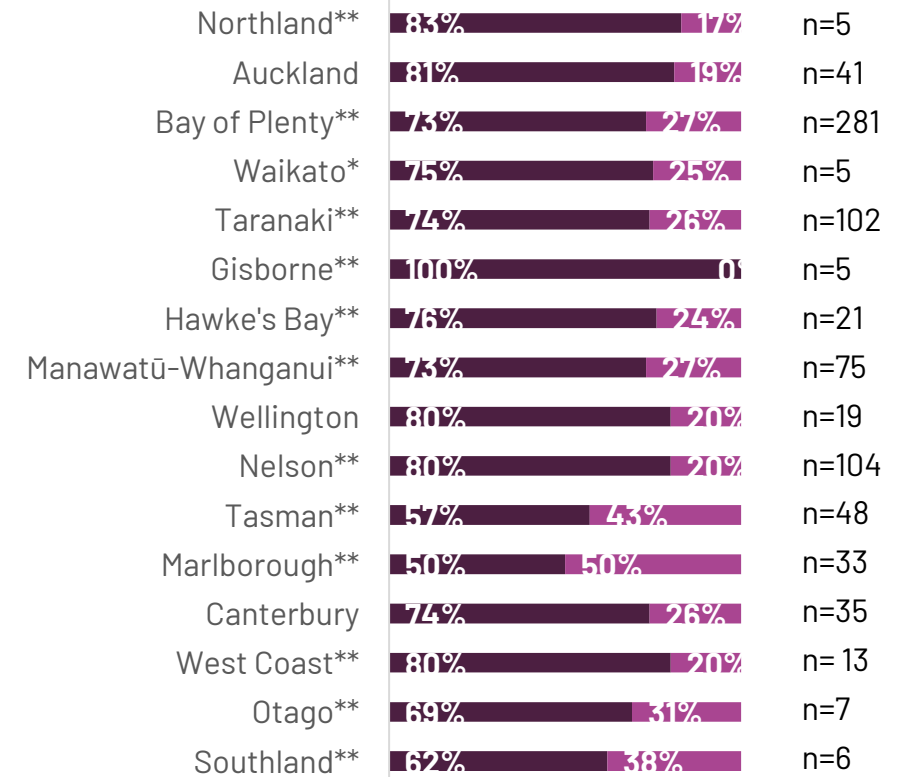
## Gender



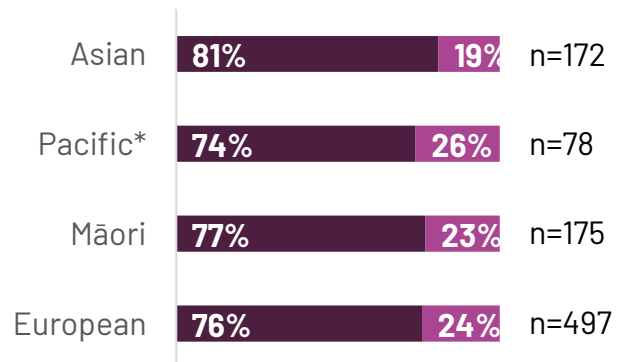
## Age group



## Region



## Ethnicity



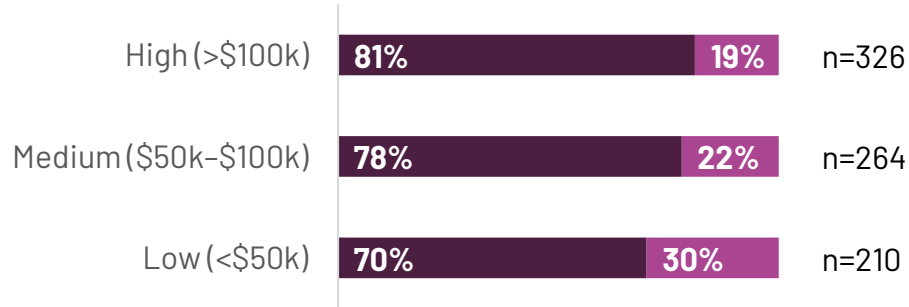
Q1: Are you...? / Q2: What is your date of birth? / Q3: Where do you live? / Q4: Which ethnic group(s) do you belong to?

Base: Parents / caregivers of ECE-enrolled child(ren)(n=618); Parents / caregivers of child(ren) not in ECE (n=182). Caution: Low base size (n<100\*), (n<50\*\*).

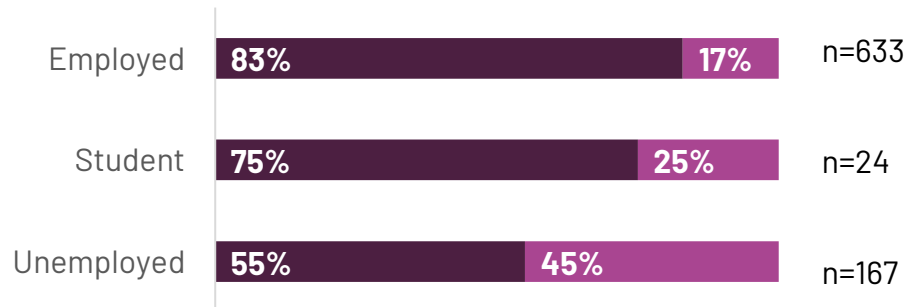
# Comparative demographic breakdown (ii)

Parents / caregivers of ECE-enrolled child(ren)   
 Parents / caregivers of child(ren) not in ECE 

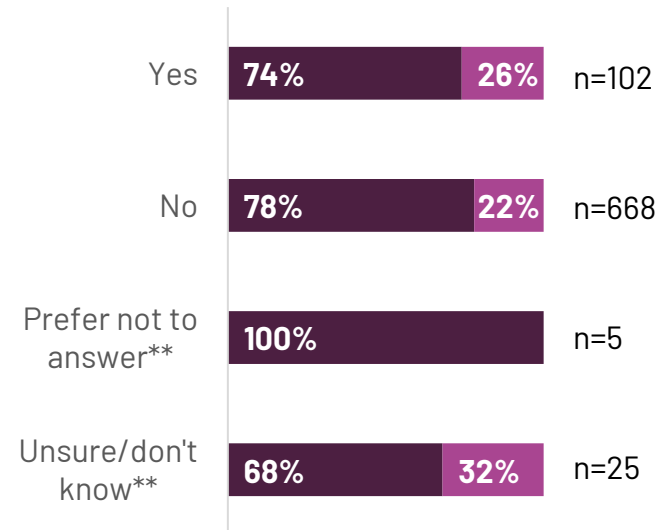
## Household income (HHI)



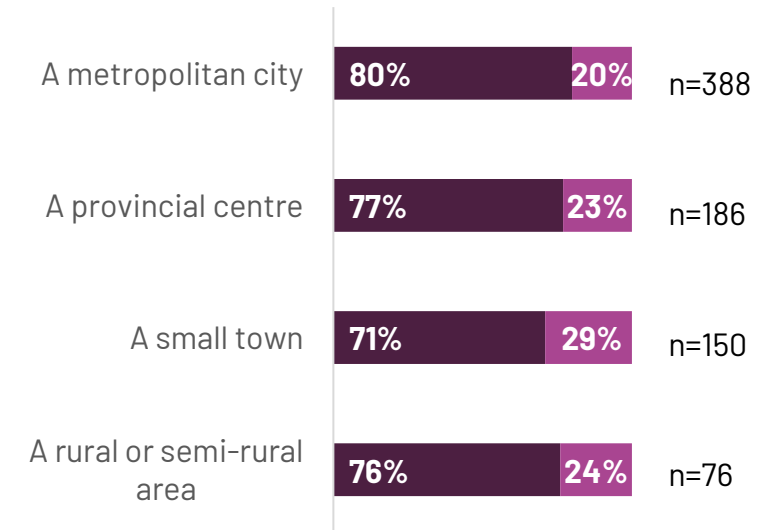
## Employment status



## Household with disability



## Area type



**Q4:** Which of the following categories best describes your total household annual income? (Combined income of every total household member before taxes) / **Q5:** Which of the following best describes your employment status? / **QCD4:** Do you or anyone in your household have a disability or think of themselves as being disabled?

**Base:** Parents / caregivers of ECE-enrolled child(ren)(n=618); Parents / caregivers of child(ren) not in ECE (n=182). **Caution:** Low base size (n<100\*), (n<50\*\*).

# ECE services used / attending

Among the parents / caregivers of ECE-aged children surveyed, more than half (53%) have child/ren currently attending an early childhood education centre.

## ECE service currently used / attending

Early & Care Service	53%	n=423
Kindergarten	20%	n=163
Playcentre	8%	n=65
Home-based education & care services	5%	n=39
Kōhanga Reo	4%	n=28
Aoga Amata or other Pacific language ECE centre	1%	n=10
Puna Reo	0.5%	n=4
<hr/>		
Primary School / Kura	11%	n=39
Informal care by family / whanāu / friends	7%	n=25
Playgroup / Ngā Puna Kōhungahunga	4%	n=16
Private Au Pair / nanny	1%	n=7
Te Aho o Te Kura Pounamu (Te Kura)	0.4%	n=1
Does not attend ECE	19%	n=46

Respondents who selected any of these options for their child(ren) are categorised as **Parents / caregivers of ECE-enrolled child(ren)**.

Respondents who only selected these options for their child(ren) are categorised as **Parents / caregivers of child(ren) not in ECE**.

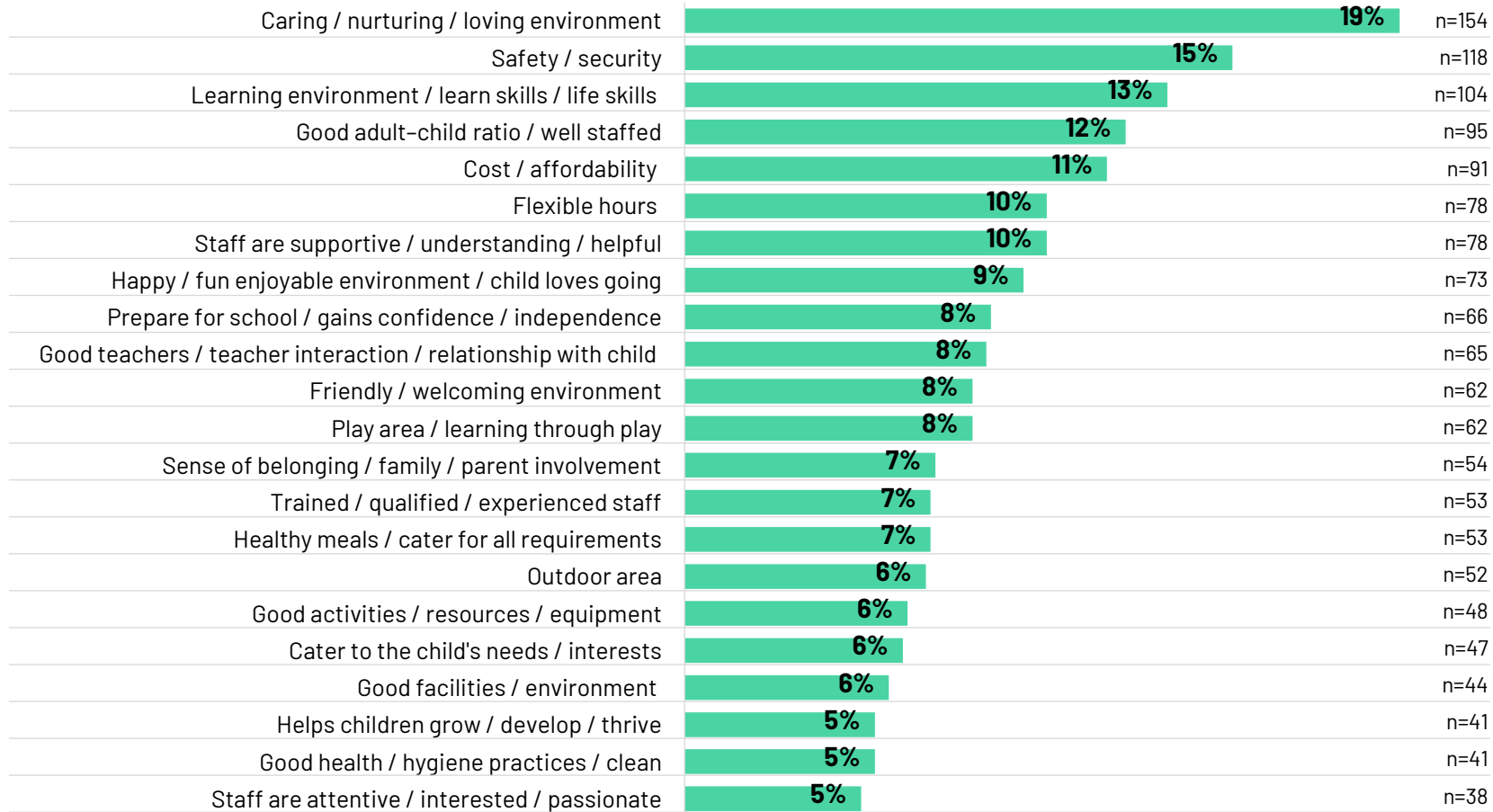
**Q3:** You indicated that you have [# NUMBER] child(ren) aged 5 years old or younger. Can you please tell us which of the following, if any, [CHILD #] is currently attending?

**Base:** Total sample (n=800)

# Ideal ECE service

Parents / caregivers value a *caring, nurturing, loving & safe* environment in terms of an ideal ECE service.

## Ideal ECE service - coded



**QGV3:** What does an ideal ECE service look like to you?

**Base:** Total sample (n=800). **Note:** Only coded answers 5% and higher shown. **Note:** As this was a free-text question, individual responses may have been coded into multiple themes, meaning percentages may sum to more than 100%.

# Ideal ECE service – in their own words

## Caring / nurturing / loving environment



*An environment where the child can be nurtured and cared for, where they can learn and develop their own interests and have encouragement of those interests developed, a healthy meal each day, a place to call a second home where the child can develop friendships, to be confident and expressive.”*

*Kind caring enthusiastic teachers that love to have fun with the kids doing fun activities and keeping them safe and happy.”*

*The teachers should be loving, the kids should be happy, the rooms should be clean and the environment should be happy and positive.”*

## Safety / security



*In an ideal early childhood education setting, every day my child should feel safe, accepted and supported emotionally.”*

*A place where children can learn, play, grow and explore, all whilst being completely safe, nurtured and cared for.”*

*Good hours for work (7.30am - 5.30pm), feed them healthy meals, good sleep spaces when they're young which are well monitored, good play equipment inside and outside, teachers that challenge them to do more and who care for them and give them lots of love and cuddles when needed so they feel safe, secure and happy, and excellent facilities.”*

## Learning environment / learning skills



*An ideal ECE service should have caring teachers, a safe environment and plenty of play-based learning that helps kids develop social skills naturally.”*

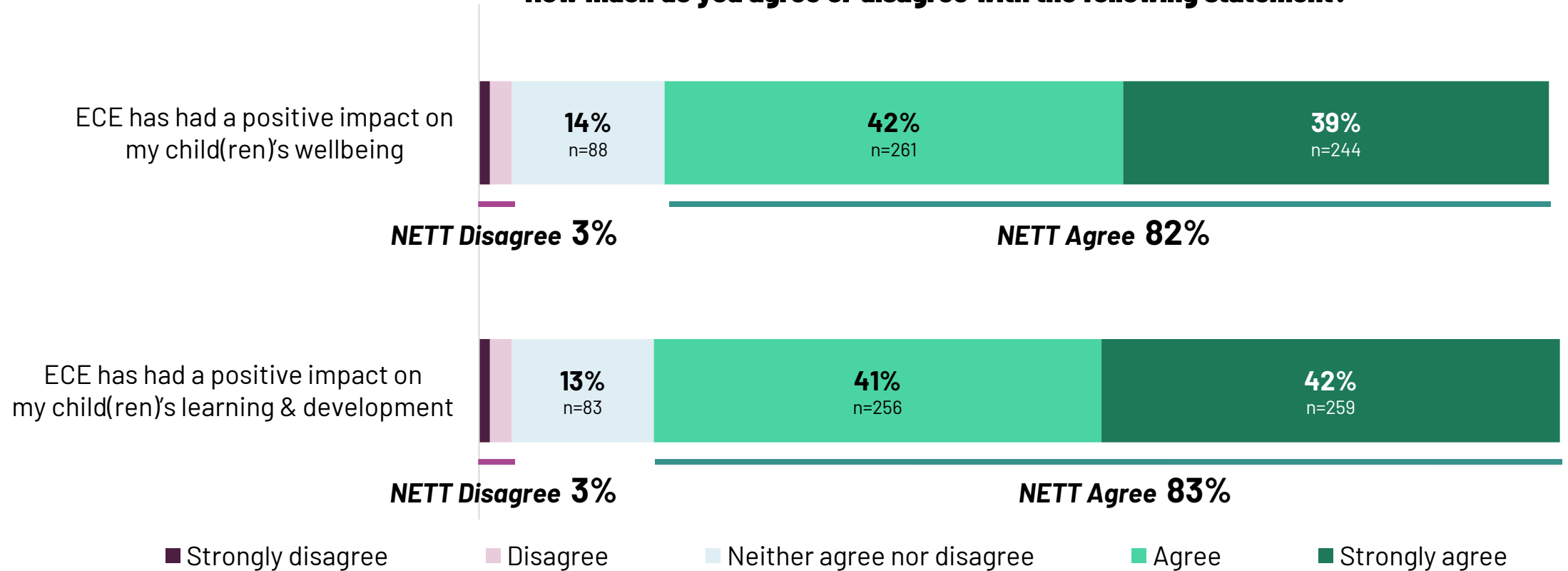
*One that teaches my kid a wide range of activities and skills, such as drawing and colouring and enables her to be creative. I would like her to develop the ability to interact with her peers in a safe environment.”*

*A place where my kid should feel safe around other kids and adults. Also should have fun but learn basic skills like reading, writing, counting, directions and colours.”*

# Impact of ECE on children

The vast majority of parents / caregivers with children in ECE believe that ECE has had a positive impact on their children's wellbeing & learning.

## How much do you agree or disagree with the following statement?



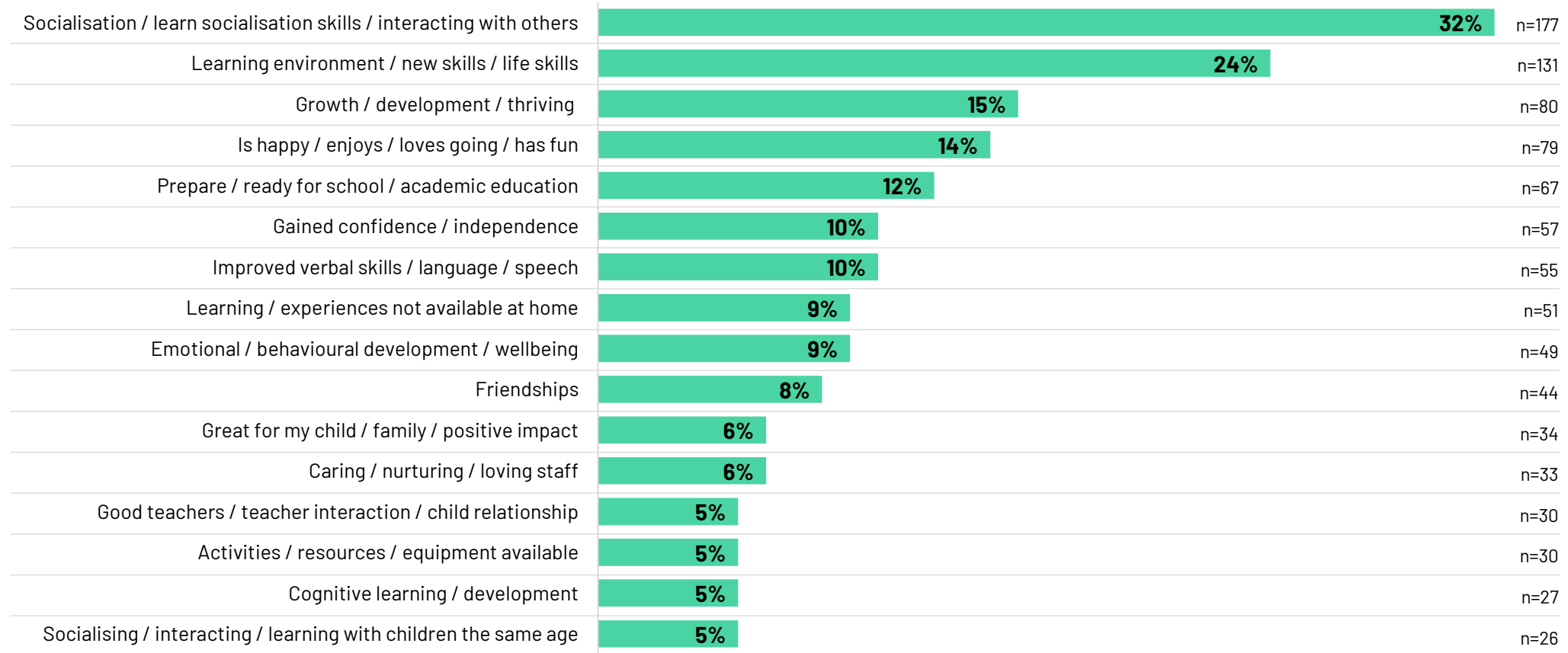
**QGV1:** How much do you agree or disagree with the following statement?

**Base:** Parents / caregivers of ECE-enrolled child(ren)(n=618)

# Positive impact of ECE on child(ren)

Parents / caregivers most frequently highlight *socialisation skills* & the *learning environment* as key positive impacts of ECE on their children.

## Reasons ECE had positive impact - coded



**QGV2A:** What makes you say that ECE has had a positive impact on your child/ren's learning & development and/or wellbeing?

**Base:** Parents / caregivers of ECE-enrolled child(ren) for whom ECE had positive impact (n=550). **Note:** Only coded answers 5% and higher shown. **Note:** As this was a free-text question, individual responses may have been coded into multiple themes, meaning percentages may sum to more than 100%.

# Positive impact of ECE on child(ren) – in their own words

## Social skills / interacting with others



*It gives my son a safe happy environment to explore and helps development his learning and social skills.”*

*ECE is helping to build confidence, character and resilience for my child. He is provided with so many learning opportunities and social interactions that he would not get without this service. He absolutely loves sharing snippets of his day with us and while drop offs can sometimes be hard, he always has an absolute ball once settled..”*

*My child learns more things, has friends and overall better social interaction.”*

## Learning new skills



*It has provided access to learning opportunities that he wouldn't have had otherwise, plus more focus on learning than he would have been able to have if not in an ECE.”*

*He has grown in confidence and is learning from the children around him. He gets to have experiences I can't offer and make friends with new people.”*

*Learning to socialise, learning numeracy and literacy, learning life skills, learning how to handle conflicts.”*

*Lots of learning and being around other kids.”*

## Growth and development



*My child has grown in confidence, through relating and mingling with other kids.”*

*Consistent routines and nurturing environments enhanced their learning growth overall.”*

*ECE has strengthened confidence, social skills, curiosity, communication and overall developmental growth.”*

*ECE gives my son a variety of things to do in a happy and safe environment. He is cared for by wonderful teachers, who are supportive in helping him grow and develop. He is also gaining more social skills.”*

# Negative impact of ECE on child(ren)

Among the very small proportion of parents / caregivers for whom ECE has not had a positive impact on their children, *value for money / cost, sickness & inadequate support / supervision* were the most commonly mentioned issues.

## Negative impact of ECE – Key themes

<p><b>Value for money / cost</b></p>	<p><i>“It’s not that it [hasn’t] made an impact it’s more so the costs behind it and we are having to pay more than what’s provided.”</i></p>	<p><i>“It’s is a child farm. Corporations are in it for the money rather than best interests of kids.”</i></p>
<p><b>Sickness</b></p>	<p><i>“Parents are sending their kids to ECE sick so they can continue to work to afford to live making my kid sick every 2-3 weeks.”</i></p>	<p><i>“Gets quite a lot of bugs/sick.”</i></p>
<p><b>Inadequate support / supervision</b></p>	<p><i>“Blaming, unsupportive and terrible supervision policies. Not listening to the children.”</i></p>	<p><i>“My daughter didn’t enjoy her time at her old ECE centre (daycare) and struggled to make friends and there was no support from the teachers there. She loves her time at playcentre though.”</i></p>

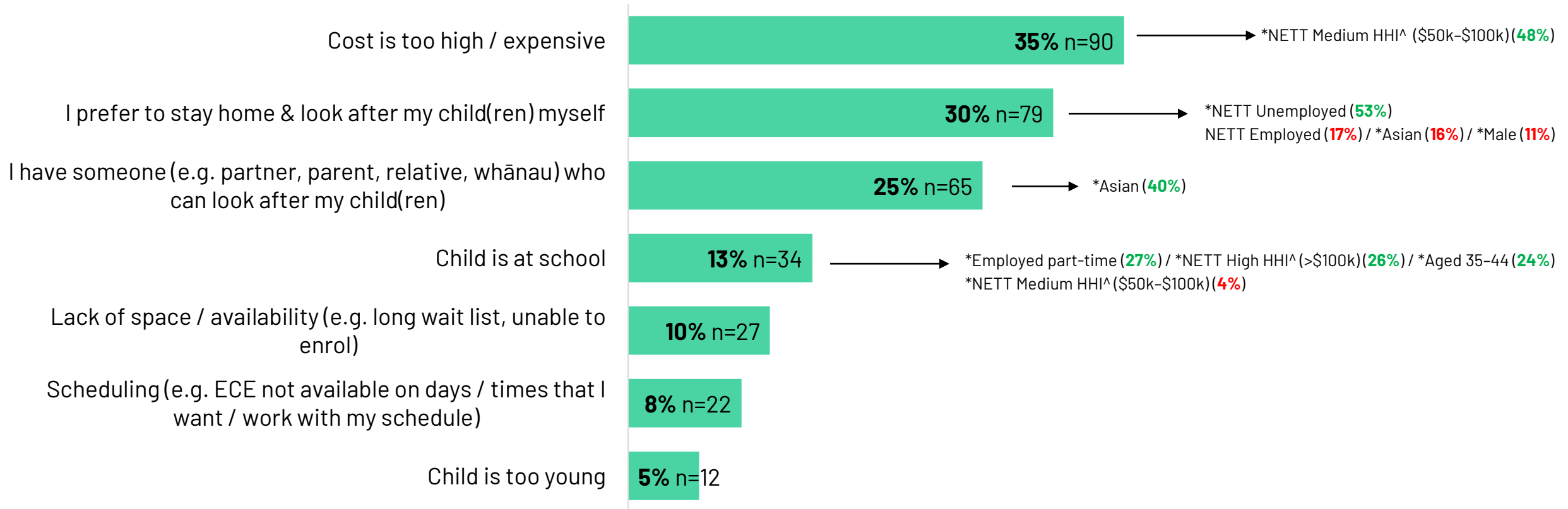
**QGV2B:** What makes you say that ECE has **not** had a positive impact on your child/ren’s learning & development and/or wellbeing?

**Base:** Parents / caregivers of ECE-enrolled child(ren) for whom ECE had no positive impact (n=30\*\*). **Caution:** Low base size (n<50\*\*), too small to report on %.

# Reasons for children's non-attendance of ECE

Cost, parental preference for home care & alternative care arrangements are the leading reasons cited by parents / caregivers for their children's not attending ECE.

## Reasons child(ren) do(es) not attend ECE



**QCA6:** You indicated that you have a child / children aged 5 or younger not in ECE. Which of the following reason/s best describe why they do not attend ECE?

**Base:** Total parents / caregivers of child(ren) not in ECE (n=260). **Caution:** Low base size (n<100\*). **Note:** Only reasons 5% and higher at total level shown. ^HHI = Household Income

# Reasons for children's non-attendance of ECE

Around a third of parents / caregivers with no children in ECE selected *high cost & preference to stay home* as the reason for their child(ren)'s not attending ECE. Among those with at least one child in ECE, 44% state *high cost* was the reason not all their children are attending ECE.

Reasons	Total	Those with at least one child in ECE & at least one child not in ECE (n=78*)	Those with no child(ren) in ECE (n=182)
Cost is too high / expensive	35%	44%	31%
I prefer to stay home & look after my child(ren) myself	30%	18%	36%
I have someone (e.g., partner, parent, relative, whānau) who can look after my child(ren)	25%	19%	27%
Child is at school	13%	14%	13%
Lack of space / availability (e.g. long wait list, unable to enrol)	10%	10%	10%
Scheduling (e.g. ECE not available on the days / times that works with our schedule)	8%	10%	8%
Child is too young	5%	6%	4%

**QCA6:** You indicated that you have a child / children aged 5 or younger not in ECE. Which of the following reason/s best describe why they do not attend ECE?

**Base:** Total parents / caregivers of child(ren) not in ECE (n=260). **Caution:** Low base size (n<100\*). **Note:** Only reasons 5% and higher at total level shown.

# Reasons for children’s non-attendance of ECE by subgroups

	Gender			Ethnicity				Age					
	Total	Male	Female	NETT European	Māori	NETT Pacific peoples	NETT Asian	18-24	25-34	35-44	45-54	55-64	65+
	260	57*	203	167	62*	29**	50*	23**	114	99	19**	3**	2**
Cost is too high / expensive	35%	44%	32%	28%	26%	41%	48%	26%	38%	32%	42%	33%	0%
I prefer to stay home & look after my child(ren) myself	30%	11%	36%	34%	37%	45%	16%	17%	38%	28%	21%	0%	0%
I have someone (e.g., partner, parent, relative, whānau) who can look after my child(ren)	25%	35%	22%	20%	19%	28%	40%	35%	25%	25%	5%	67%	50%
Child is at school	13%	12%	13%	19%	8%	0%	4%	0%	6%	24%	16%	0%	0%
Lack of space / availability (e.g. long wait list, unable to enrol)	10%	11%	10%	11%	18%	17%	8%	9%	13%	6%	21%	0%	0%
Scheduling (e.g. ECE not available on the days / times that works with our schedule)	8%	14%	7%	7%	13%	10%	6%	17%	11%	3%	16%	0%	0%
Child is too young	5%	4%	5%	7%	3%	3%	0%	13%	5%	3%	0%	0%	0%

**QCA6:** You indicated that you have a child / children aged 5 or younger not in ECE. Which of the following reason/s best describe why they do not attend ECE?

**Base:** Total parents / caregivers of child(ren) not in ECE (n=260). **Caution:** Low base size (n<100\*), (n<50\*\*). **Note:** Only reasons 5% and higher at total level shown.

# Reasons for children's non-attendance of ECE by subgroups

	Total	Employment Status		Income			Area Type		Family Type
		NETT Employed	NETT Unemployed	NETT Low (up to \$50k)	NETT Medium (\$50k-\$100k)	NETT High (\$100,001+)	NETT Urban	NETT Rural	Single parent
	<b>260</b>	<b>163</b>	<b>97*</b>	<b>82*</b>	<b>90*</b>	<b>88*</b>	<b>237</b>	<b>23**</b>	<b>45**</b>
Cost is too high / expensive	<b>35%</b>	36%	32%	29%	<b>48%</b>	26%	35%	30%	40%
I prefer to stay home & look after my child(ren) myself	<b>30%</b>	<b>17%</b>	<b>53%</b>	30%	31%	30%	30%	39%	36%
I have someone (e.g., partner, parent, relative, whānau) who can look after my child(ren)	<b>25%</b>	31%	15%	27%	27%	22%	25%	26%	16%
Child is at school	<b>13%</b>	17%	7%	9%	<b>4%</b>	<b>26%</b>	14%	4%	16%
Lack of space / availability (e.g. long wait list, unable to enrol)	<b>10%</b>	10%	10%	11%	13%	7%	11%	4%	11%
Scheduling (e.g. ECE not available on the days / times that works with our schedule)	<b>8%</b>	9%	8%	10%	11%	5%	8%	9%	13%
Child is too young	<b>5%</b>	4%	5%	6%	2%	6%	5%	0%	2%

**QCA6:** You indicated that you have a child / children aged 5 or younger not in ECE. Which of the following reason/s best describe why they do not attend ECE?

**Base:** Total parents / caregivers of child(ren) not in ECE (n=260). **Caution:** Low base size (n<100\*), (n<50\*\*). **Note:** Only reasons 5% and higher at total level shown.

# Reasons for children's non-attendance of ECE by region

	Total	Northland	Auckland	Bay of Plenty	Waikato	Gisborne	Hawkes Bay	Manawatu-Whanganui	Taranaki	Wellington	Marlborough	Nelson	Tasman	Canterbury	West Coast	Otago	Southland
<b>Total</b>	<b>260</b>	<b>10**</b>	<b>78*</b>	<b>16**</b>	<b>25**</b>	<b>1**</b>	<b>6**</b>	<b>17**</b>	<b>6**</b>	<b>33**</b>	<b>4**</b>	<b>2**</b>	<b>3**</b>	<b>37**</b>	<b>1**</b>	<b>16**</b>	<b>5**</b>
Cost is too high / expensive	<b>35%</b>	40%	44%	44%	32%	100%	33%	24%	0%	39%	50%	0%	0%	32%	0%	19%	0%
I prefer to stay home & look after my child(ren) myself	<b>30%</b>	10%	21%	44%	44%	0%	33%	47%	50%	24%	0%	100%	33%	30%	0%	31%	80%
I have someone (e.g., partner, parent, relative, whānau) who can look after my child(ren)	<b>25%</b>	60%	27%	31%	32%	0%	33%	12%	0%	18%	0%	50%	33%	16%	0%	25%	60%
Child is at school	<b>13%</b>	10%	10%	6%	20%	0%	17%	6%	0%	12%	25%	0%	33%	22%	0%	12%	20%
Lack of space / availability (e.g. long wait list, unable to enrol)	<b>10%</b>	20%	6%	12%	4%	0%	17%	6%	33%	15%	0%	0%	0%	14%	0%	19%	0%
Scheduling (e.g. ECE not available on the days / times that works with our schedule)	<b>8%</b>	20%	10%	19%	12%	0%	0%	6%	0%	12%	0%	0%	0%	0%	0%	6%	0%
Child is too young	<b>5%</b>	0%	5%	6%	4%	0%	0%	6%	17%	3%	25%	50%	0%	0%	0%	6%	0%

**QCA6:** You indicated that you have a child / children aged 5 or younger not in ECE. Which of the following reason/s best describe why they do not attend ECE?

**Base:** Total parents / caregivers of child(ren) not in ECE (n=260). **Caution:** Low base size (n<100\*), (n<50\*\*). **Note:** Only reasons 5% and higher at total level shown.

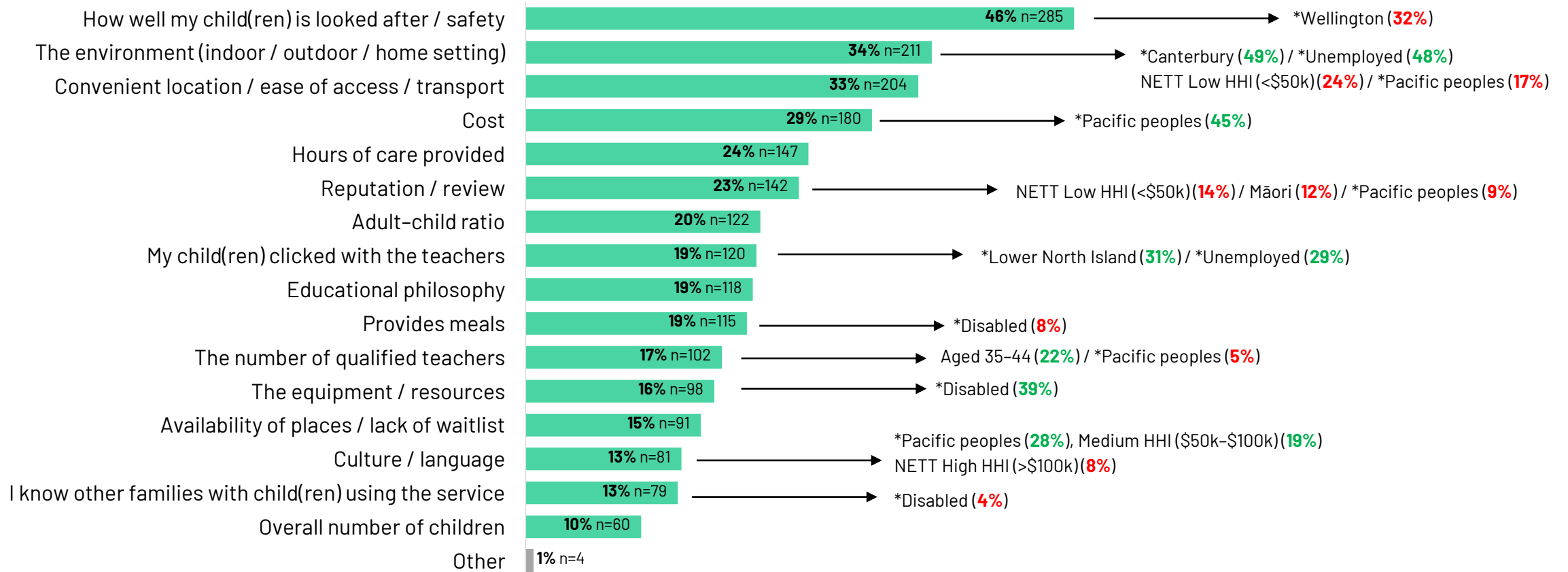
# ECE ACCESS

# 03

# Influential factors when current ECE service(s) was chosen

The main consideration for selecting an ECE service was *how well their child(ren) will be looked after & the child(ren)'s safety*, followed by the *environment at the ECE service & the convenience of location*.

## Factors considered when current ECE service(s) was chosen

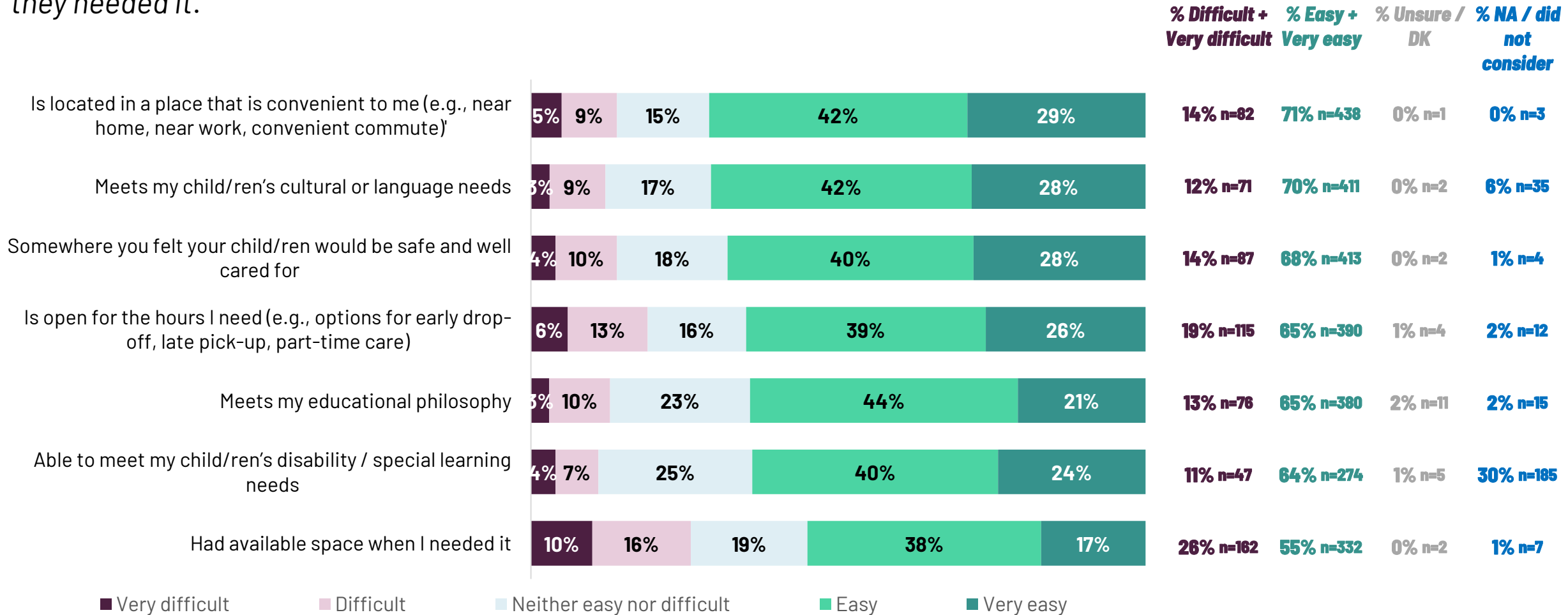


**QACC2:** Thinking about the ECE service(s) you are currently using for your child/ren, which of the following factors **most** influenced your choice about which service(s) to use?

**Base:** Total parents / caregivers of ECE-enrolled child(ren) (n=618). **Caution:** Low base size (n<100\*).

# Ease of finding suitable ECE service(s)

For 1-in-4 parents / caregivers it was difficult / very difficult to find an ECE service that *had available space when they needed it*.



**QACC1:** How easy or difficult was it to find ECE service(s) for your child(ren) that suited your family's needs in terms of the following?

**Base:** Parents / caregivers of ECE-enrolled child(ren) (n=618); re-based to exclude 'Not applicable / did not consider this' and 'Unsure / don't know' responses. The base (n) for each statement reflects this exclusion.

# Ease of finding suitable ECE service(s)

## Easy / difficult to find suitable ECE service(s) by demographic subgroups

	<b>Total Difficult</b> <i>(Difficult + Very difficult)</i>	<b>Significant differences</b> <i>(compared to Total)</i>	<b>Total Easy</b> <i>(Easy + Very easy)</i>	<b>Significant differences</b> <i>(compared to Total)</i>
Is located in a place convenient to me	14%		71%	
Meets my child(ren)'s cultural / language needs	12%	Asian (21%) Auckland (17%)	70%	*Canterbury (81%) South Island (75%) European (73%)
Somewhere you felt your child/ren would be safe and well cared for	14%		68%	
Is open for the hours I need	19%	**Northland (35%)	65%	
Meets my educational philosophy	13%		65%	
Able to meet my child(ren)'s disability / special learning needs	11%	*Pacific peoples (16%) Disabled (15%)	64%	Disabled (63%)
Had available space when I needed it	26%		55%	*Lower NI (67%)

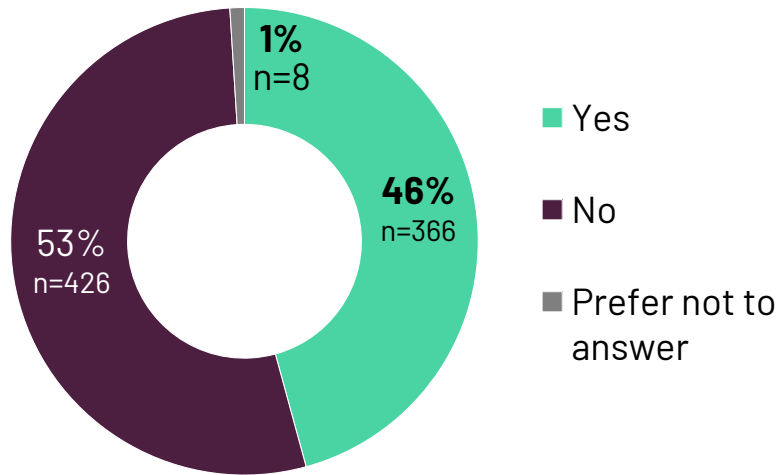
**QACC1:** How easy or difficult was it to find ECE service(s) for your child(ren) that suited your family's needs in terms of the following?

**Base:** Parents / caregivers of ECE-enrolled child(ren) (n=618); re-based to exclude 'Not applicable / did not consider this' and 'Unsure / don't know' responses. The base (n) for each statement reflects this exclusion. **Caution:** Low base size (n<100\*), (n<50\*\*).

# Waitlist for ECE service

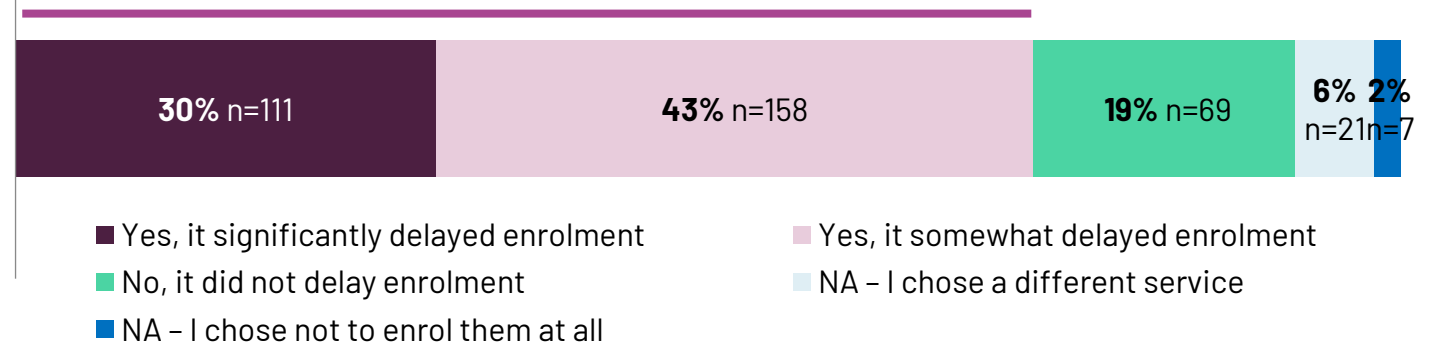
Out of 46% of parents who were placed on a waitlist for an ECE Service, the majority (73%) expressed it had delayed enrolment to some extent.

## Ever placed on a waitlist



## Delay in enrolment

**73%** of parents / caregivers on a waitlist experienced a delay in enrolment



**QACC6:** Have you ever experienced being placed on a waitlist for an ECE service for your child/ren? / **QACC7:** Did being placed on a waitlist delay your ability to enrol your child/ren when you wanted to?

**Base:** Total sample (n=800); Parents / caregivers placed on a waitlist (n=366)

# Delay in Enrolment by Subgroups

	Total	Ethnicity				Income			Age						Area type	
		NETT European	Māori	NETT Pacific	NETT Asian	NETT Low (up to \$50k)	NETT Medium (\$50k-\$100k)	NETT High (\$100,001+)	18-24	25-34	35-44	45-49	50-54	55-64	NETT Urban	NETT Rural
	<b>366</b>	<b>235</b>	<b>89*</b>	<b>37**</b>	<b>73*</b>	<b>89*</b>	<b>116</b>	<b>161</b>	<b>31**</b>	<b>164</b>	<b>145</b>	<b>15**</b>	<b>8**</b>	<b>3**</b>	<b>264</b>	<b>102</b>
Yes, it significantly delayed enrolment	<b>20%</b>	29%	28%	35%	29%	27%	34%	30%	23%	29%	34%	40%	12%	0%	30%	31%
Yes, it somewhat delayed enrolment	<b>20%</b>	45%	44%	46%	44%	43%	47%	40%	55%	41%	41%	47%	62%	33%	44%	41%
No, it did not delay enrolment	<b>18%</b>	18%	19%	16%	22%	20%	12%	23%	13%	21%	20%	7%	12%	0%	19%	20%
Not applicable – I chose a different service	<b>14%</b>	6%	7%	3%	4%	8%	5%	5%	10%	7%	3%	0%	12%	33%	5%	7%
Not applicable – I chose not to enrol them at all	<b>12%</b>	2%	2%	0%	1%	2%	2%	2%	0%	2%	1%	7%	0%	33%	2%	1%

**QACC7:** Did being placed on a waitlist delay your ability to enrol your child/ren when you wanted to?

**Base:** Total sample (n=800); Parents / caregivers placed on a waitlist (n=366). **Caution:** Low base size (n<100\*), (n<50\*\*).

# Delay in Enrolment by Region

	<b>Total</b>	<b>Northland</b>	<b>Auckland</b>	<b>Bay of Plenty</b>	<b>Waikato</b>	<b>Gisborne</b>	<b>Hawkes Bay</b>	<b>Manawatu - Whanganui</b>	<b>Taranaki</b>	<b>Wellington</b>	<b>Marlborough</b>	<b>Tasman</b>	<b>Canterbury</b>	<b>Otago</b>	<b>Southland</b>
<b>Total</b>	<b>366</b>	<b>14**</b>	<b>123</b>	<b>14**</b>	<b>37**</b>	<b>4**</b>	<b>10**</b>	<b>16**</b>	<b>9**</b>	<b>55*</b>	<b>3**</b>	<b>5**</b>	<b>45**</b>	<b>19**</b>	<b>8**</b>
Yes, it significantly delayed enrolment	<b>30%</b>	36%	30%	50%	24%	0%	30%	19%	22%	27%	0%	20%	38%	21%	62%
Yes, it somewhat delayed enrolment	<b>43%</b>	36%	46%	43%	46%	75%	40%	44%	33%	42%	100%	20%	38%	47%	38%
No, it did not delay enrolment	<b>19%</b>	14%	18%	7%	22%	25%	10%	25%	22%	22%	0%	60%	18%	26%	0%
Not applicable – I chose a different service	<b>6%</b>	14%	5%	0%	3%	0%	20%	12%	11%	7%	0%	0%	7%	0%	0%
Not applicable – I chose not to enrol them at all	<b>2%</b>	0%	2%	0%	5%	0%	0%	0%	11%	2%	0%	0%	0%	5%	0%

**QACC7:** Did being placed on a waitlist delay your ability to enrol your child/ren when you wanted to?

**Base:** Total sample (n=800); Parents / caregivers placed on a waitlist (n=366). **Caution:** Low base size (n<100\*), (n<50\*\*).

# Time waited for a place in ECE

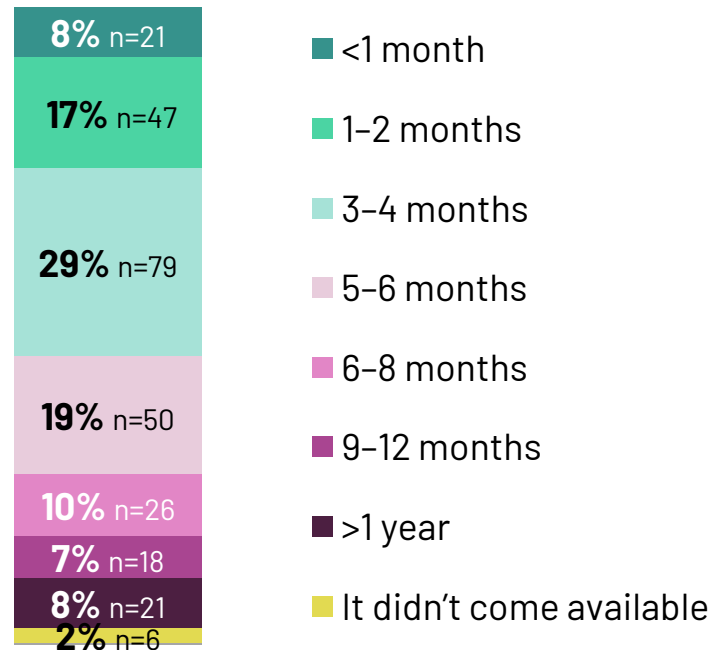
More than half (54%) of parents / caregivers on waitlist got a place for their child in ECE in 0–4 months; while, 8% indicated that they had to wait over a year.



73%

**Proportion of parents / caregivers placed on a waitlist who experienced a delay in enrolment**

## Time waited for a place



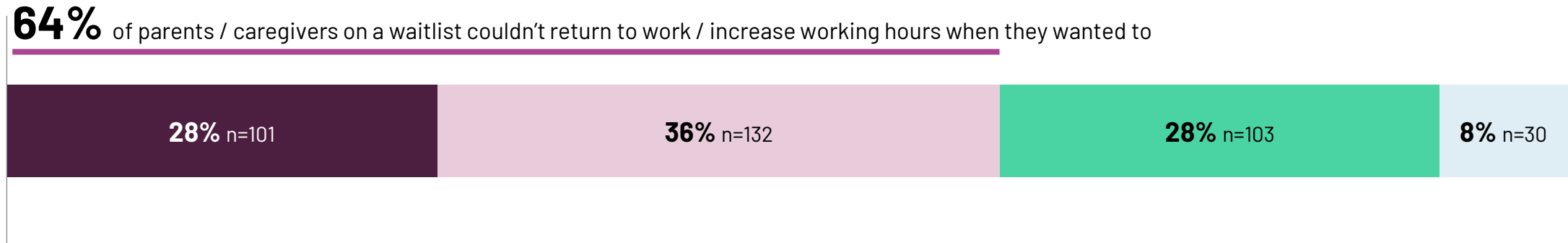
**QACC8:** How long did you need to wait for a place that met your needs?

**Base:** Parents / caregivers who experienced a delay in their ability to enrol their child (n=269)

# Impact on employment & earning potential

More than 3-in-5 parents / caregivers on waitlist to enrol their child(ren) at an ECE service indicated it had an impact on their ability to return to work & / or increase their working hours.

## Employment



- Yes, it significantly delayed my return to work / increase in hours
- Yes, it somewhat delayed my return to work / increase in hours
- No, it didn't delay my return to work / increase in hours
- NA / I wasn't planning to return to work / increase hours

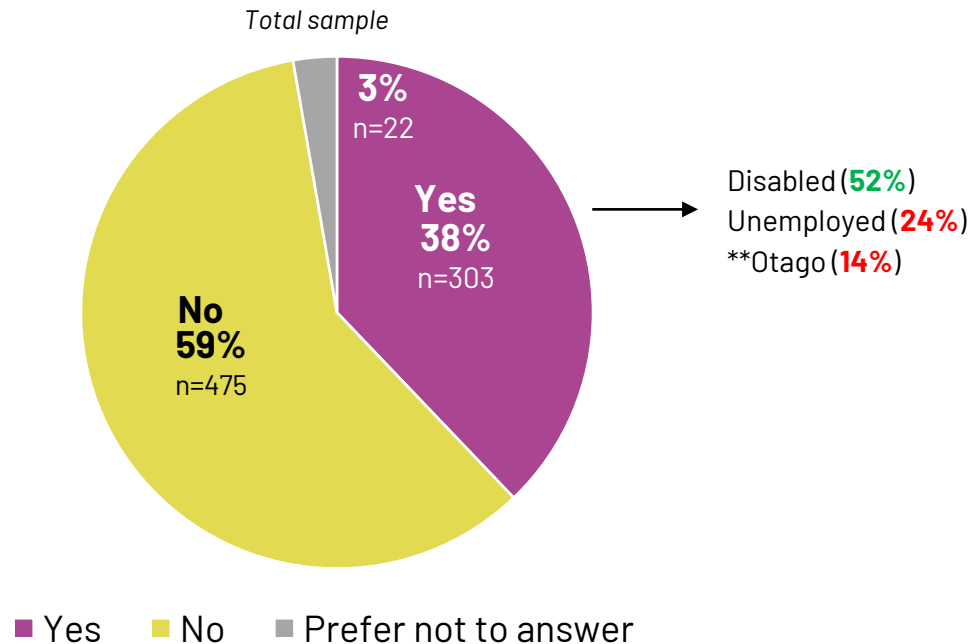
**QACC9:** And did being placed on a waitlist delay your ability to return to work and/or increase your working hours when you wanted to?

**Base:** Parents / caregivers placed on a waitlist (n=366)

# ECE access for parents / caregivers with non-standard work hours / shifts

More than 1-in-3 parents / caregivers have turned down work because it involves irregular hours / shift work that won't be covered by an ECE service.

## Turned down work due to its irregular hours / shift work that could not be covered by ECE



43%

n=273

**Proportion of employed parents / caregivers who work variable / non-standard hours**



Those self-employed or in paid employment

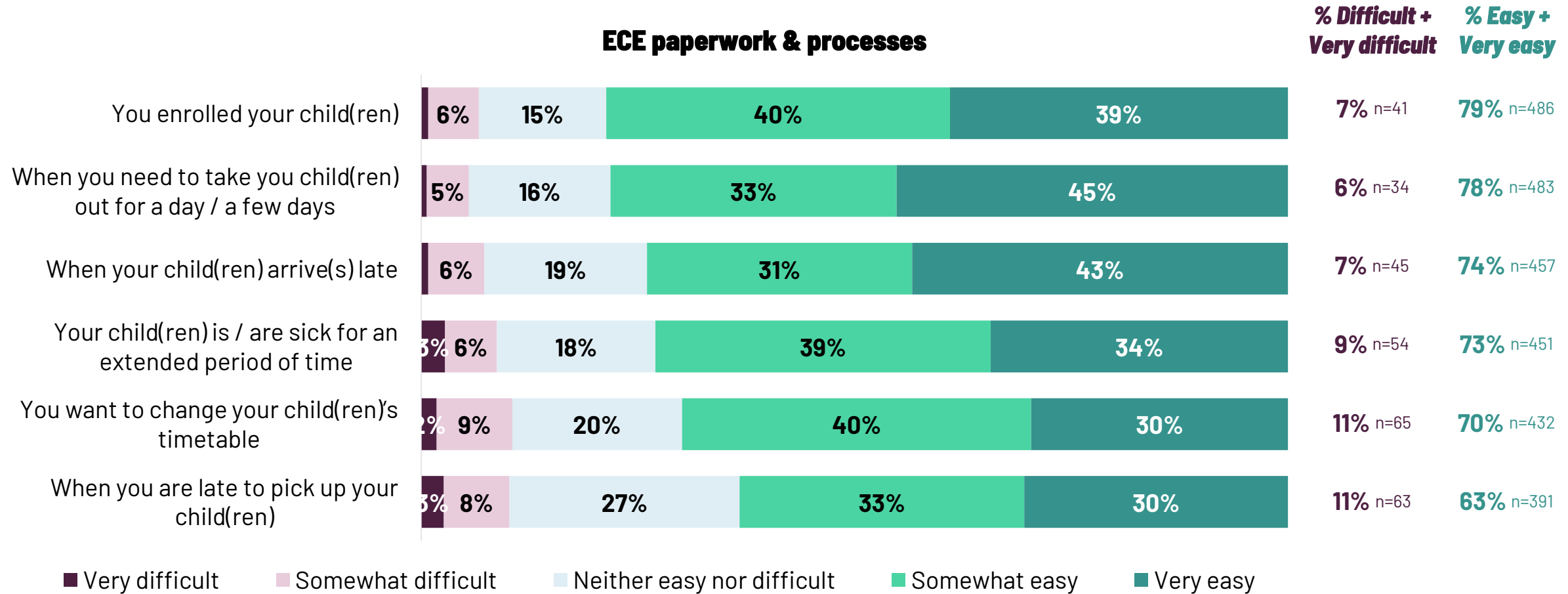
**QACC4:** Does your current job / employment involve you working variable or non-standard hours (e.g., night shifts, weekend work, irregular or flexible hours that change each week, multi-day travel)? /

**QACC5:** In the last two years, have you turned down work due to its irregular hours or shift work that could not be covered by ECE services?

**Base:** Total sample (n=800); Parents / caregivers who are self-employed or in paid employment (n=633). **Caution:** Low base size (n<50\*\*).

# ECE paperwork & processes

Most parents / caregivers found the *enrolment process* easy, whilst a smaller proportion indicated ease to *change their child(ren)'s timetable* or to navigate the paperwork involved when *they are late to pick up their child(ren)*.



**QSUB9:** How easy or difficult are your ECE's processes or paperwork when...

**Base:** Parents / caregivers of ECE-enrolled child(ren)(n=618)

# ECE paperwork & processes

## Ease of paperwork & processes by demographic subgroups

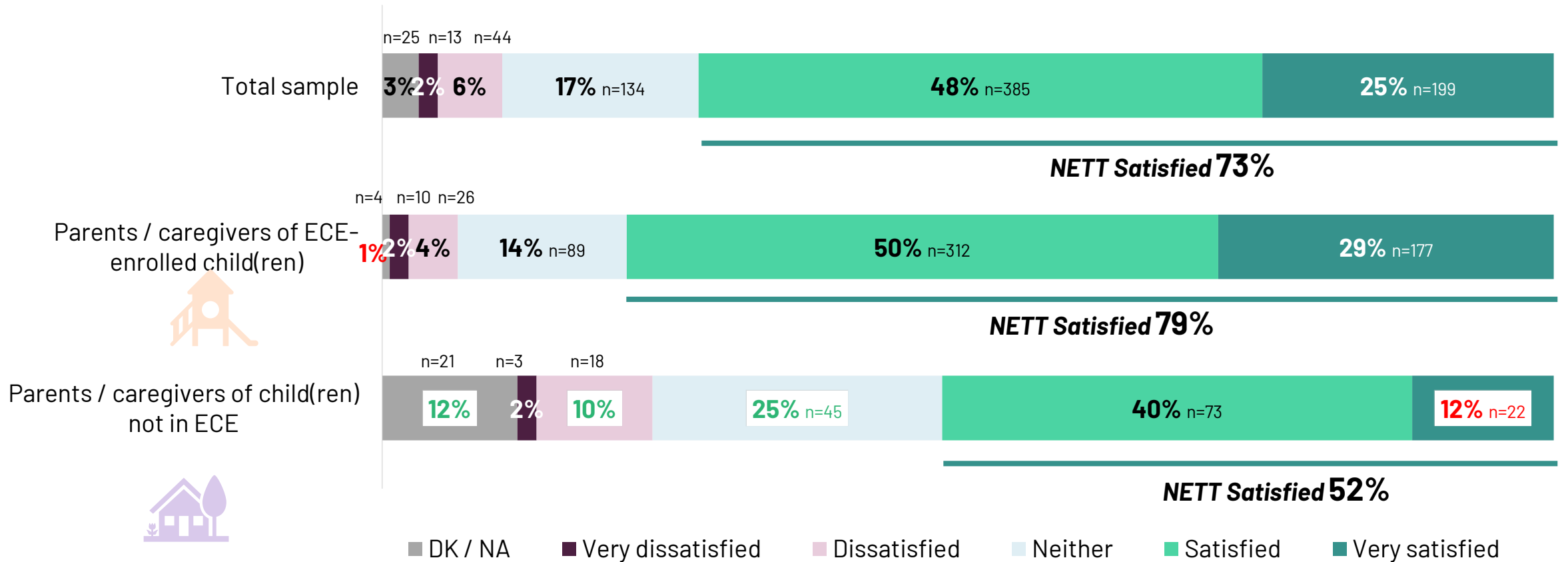
	<b>Total Difficult</b> <i>(Difficult + Very difficult)</i>	<b>Significant differences</b> <i>(compared to Total)</i>	<b>Total Easy</b> <i>(Easy + Very easy)</i>	<b>Significant differences</b> <i>(compared to Total)</i>
You enrolled your child(ren)	7%		79%	**Manawatū-Whanganui (94%) *Pacific peoples (66%) **Aged 18-24 (65%)
When you need to take you child(ren) out for a day / a few days	6%		78%	
When your child(ren) arrive(s) late	7%		74%	Male (66%)
Your child(ren) is / are sick for an extended period of time	9%		73%	
You want to change your child(ren)'s timetable	11%	*Unemployed (2%)	70%	*Wellington (59%)
When you are late to pick up your child(ren)	11%		63%	

**QACC1:** How easy or difficult was it to find ECE service(s) for your child(ren) that suited your family's needs in terms of the following?

**Base:** Total parents / caregivers of ECE-enrolled child(ren) (n=618). **Caution:** Low base size (n<100\*), (n<50\*\*).

# Overall satisfaction with available ECE services in local community

Parents / caregivers of children not enrolled in ECE are significantly more likely to be dissatisfied / very dissatisfied with the availability of ECE services in their community.



**QACC10:** Overall, how satisfied are you with the availability of ECE services in your community?

**Base:** Total sample (n=800), Parents / caregivers of ECE-enrolled child(ren)(n=618); Parents / caregivers of child(ren) not in ECE (n=182)

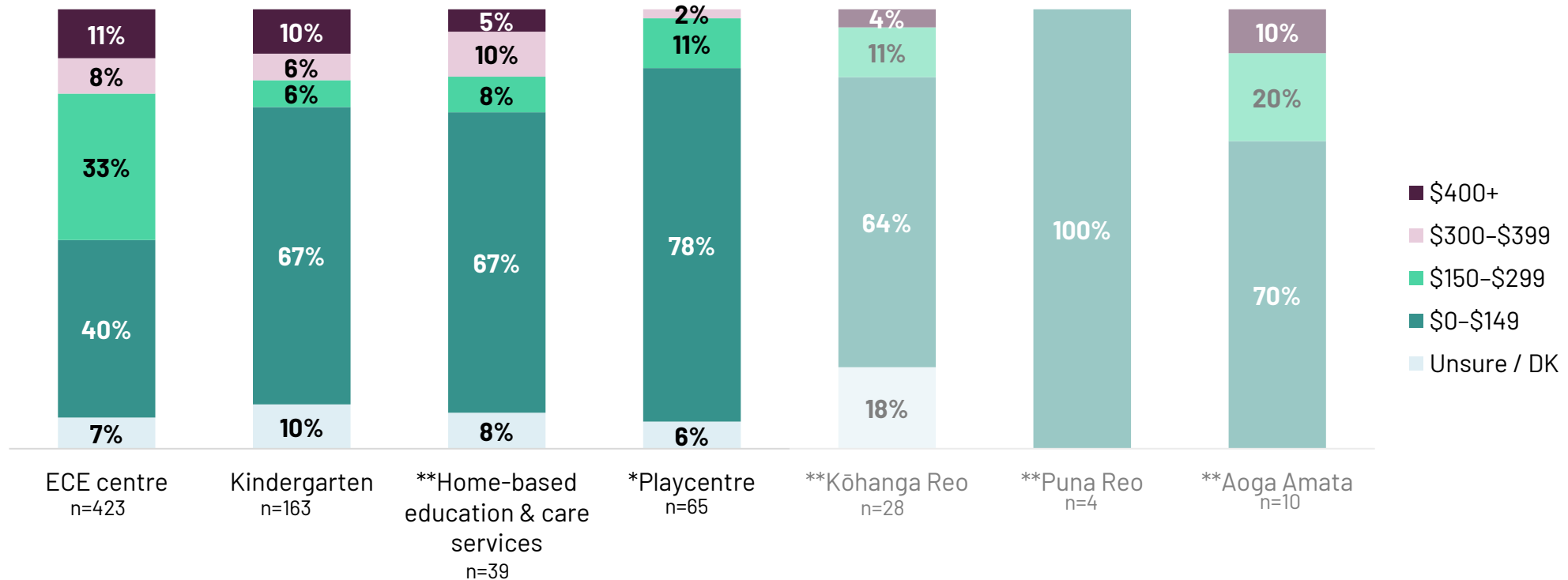
# ECE COST

# 04

# Average weekly cost of ECE

The majority of parents / caregivers surveyed spend up to \$299 per week on ECE centres, and up to \$149 per week on kindergartens.

**Total weekly spend on ECE for all children**



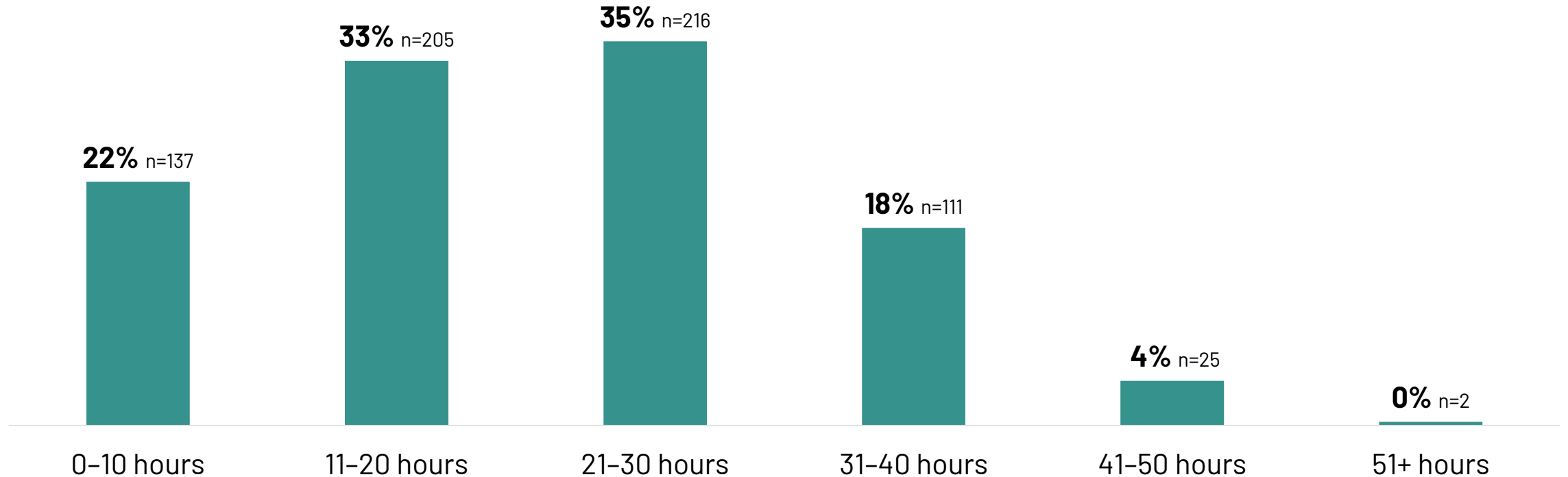
**QCA2:** Thinking now about how much you spend on ECE for all of your children, approximately how much each week in total, do you spend?

**Base:** Parents / caregivers of ECE-enrolled child(ren) by service. **Caution:** Low base size (n<100\*), (n<50\*\*).

# Hours per week attending ECE

More than a third of children attend ECE either 11-20 hours per week (33%) or 21-30 hours per week (35%).

**Average hours per week child(ren) attend(s) ECE**

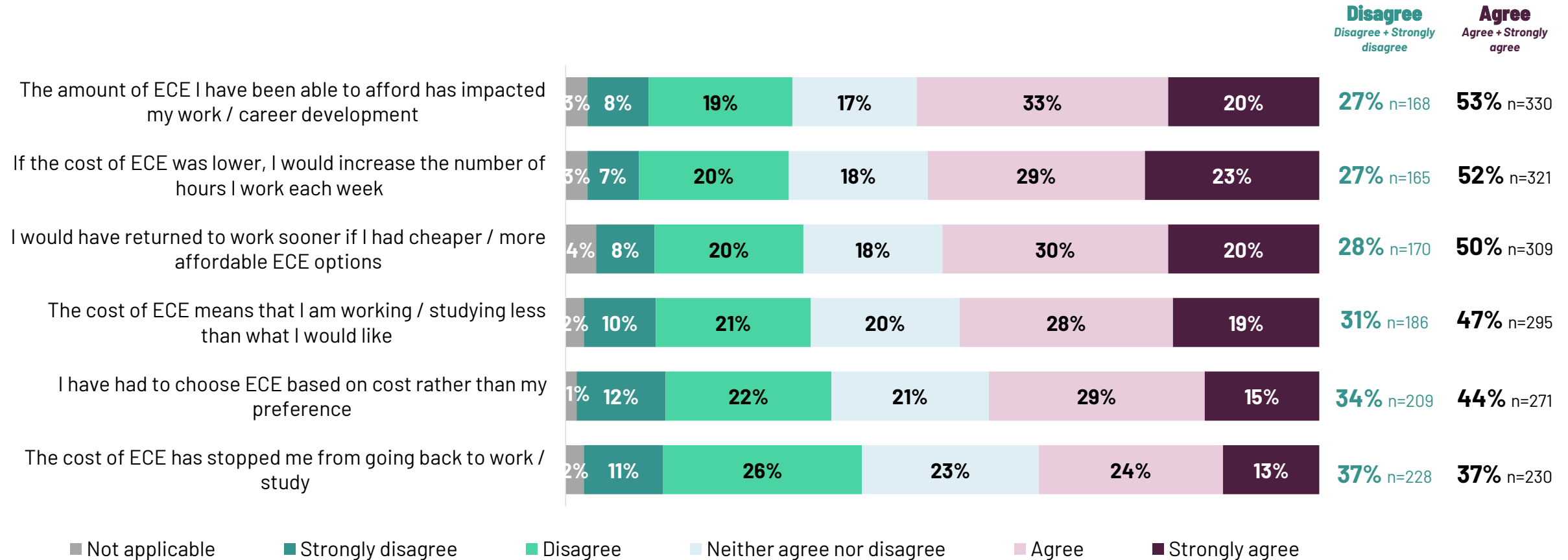


**QCA1:** In a normal week, how many hours does [INSERT NAME FROM Q52] attend Early Childhood Education (ECE)?

**Base:** Parents / caregivers of ECE-enrolled child(ren) (n=618)

# Impact of ECE cost on parents / caregivers' employment & earnings

The cost & affordability of ECE has significantly impacted parents / caregivers' career development & labour force participation; more than a third indicated that the cost of ECE has *stopped them from going back to work / study*.



**QCA5:** How much do you agree or disagree with the following statements?

**Base:** Parents / caregivers of ECE-enrolled child(ren)(n=618)

# Affordability perceptions by child's age

Parents / caregivers with children under 3 (who won't be eligible for 20 hours free ECE per week) are slightly more likely (although not significant) to agree with these statements.

	<b>Total Agree</b> <i>(Agree + Strongly agree)</i>	<b>Those with children 0 to &lt;2 years</b>	<b>Those with children 2 to &lt;3 years</b>	<b>Those with children 3+</b>
The amount of ECE I have been able to afford has impacted my work / career development	<b>53%</b> n=330	58% n=188	53% n=88	54% n=224
If the cost of ECE was lower, I would increase the number of hours I work each week	<b>52%</b> n=321	53% n=172	48% n=79	51% n=214
I would have returned to work sooner if I had cheaper / more affordable ECE options	<b>50%</b> n=309	52% n=168	49% n=82	49% n=205
The cost of ECE means that I am working or studying less than what I would like	<b>48%</b> n=295	51% n=164	47% n=78	45% n=188
I have had to choose ECE based on cost rather than my preference	<b>44%</b> n=271	46% n=148	41% n=68	44% n=182
The cost of ECE has stopped me from going back to work or study	<b>37%</b> n=230	38% n=124	39% n=64	37% n=154

**QCA5:** How much do you agree or disagree with the following statements?

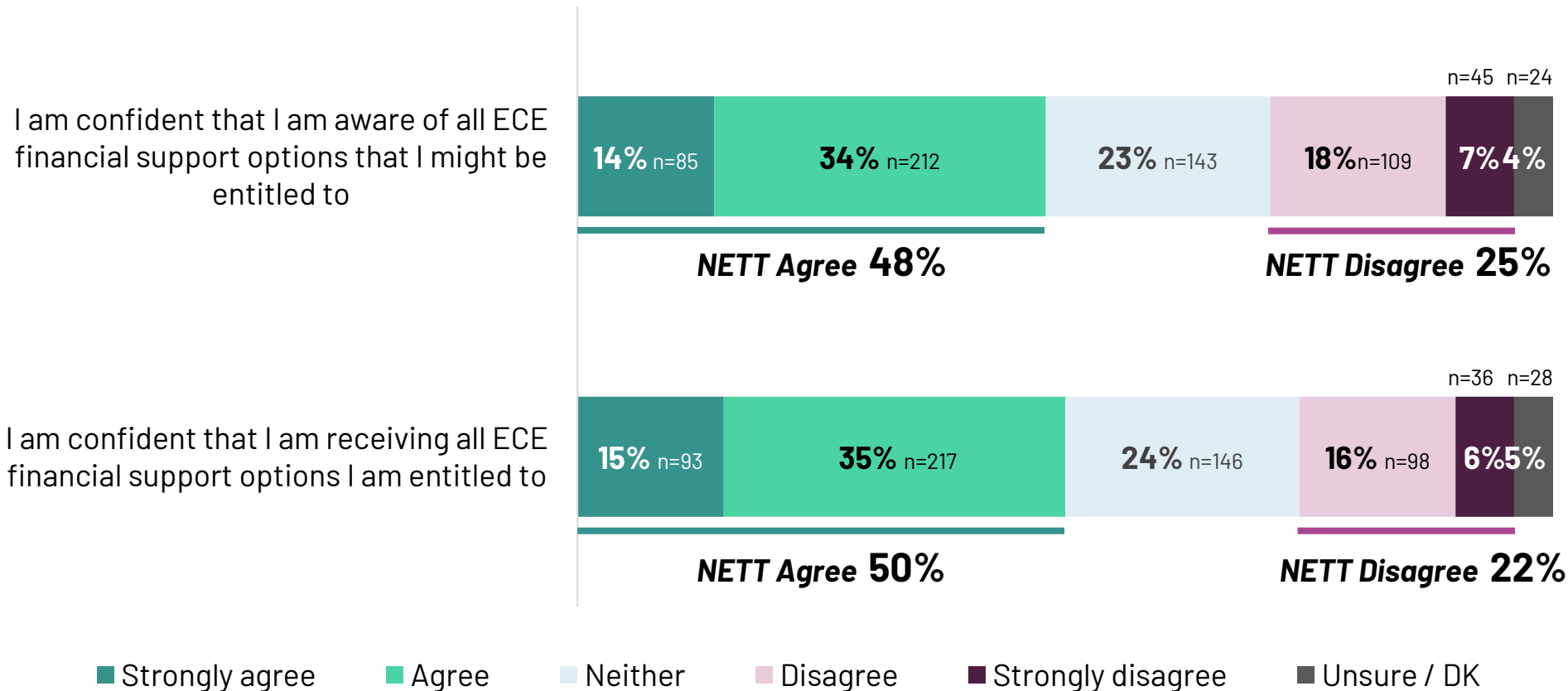
**Base:** Parents / caregivers of ECE-enrolled child(ren)(n=618); Parents / caregivers of child(ren) 0-<2 years (n=446); Parents / caregivers of child(ren) 2 to <3 years (n=204); Parents / caregivers of child(ren) 3+ (n=486)

# ECE SUBSIDIES & SUPPORT

# 05

# ECE financial support awareness

Only about half of parents / caregivers are confident in their awareness of / receiving all ECE financial support options they might be entitled to.



## Demographic differences

### Agree to both statements

- \*HHI \$150k+ (52%)
- Employed part-time (29%)

### I am confident that I am aware of all ECE financial support options that I might be entitled to - NETT agree

- \*\*Manawatū-Whanganui (71%)
- \*Lower North Island (61%)
- HHI \$150k+ (61%)
- HHI \$100k-\$150k (38%)
- Employed part-time (35%)

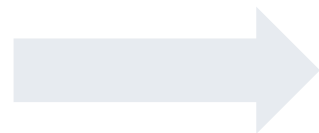
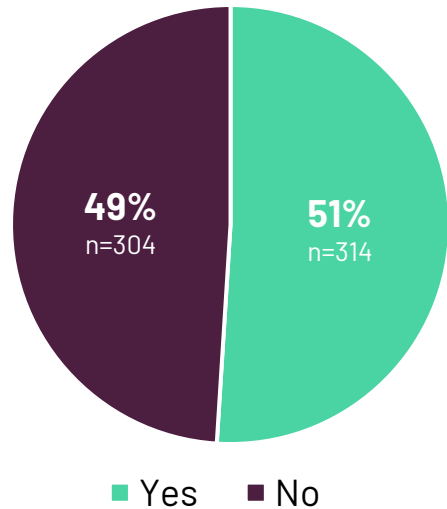
QSUB4: How much do you agree with each of the following statements:

Base: Total parents / caregivers of ECE-enrolled child(ren) (n=618). Caution: Low base size (n<100\*), (n<50\*\*).

# Applying for FamilyBoost

While just over half of parents / caregivers have applied for FamilyBoost, most of these applicants found the process easy & most received payment.

## Have you ever applied for FamilyBoost?



## Difficulty applying for FamilyBoost

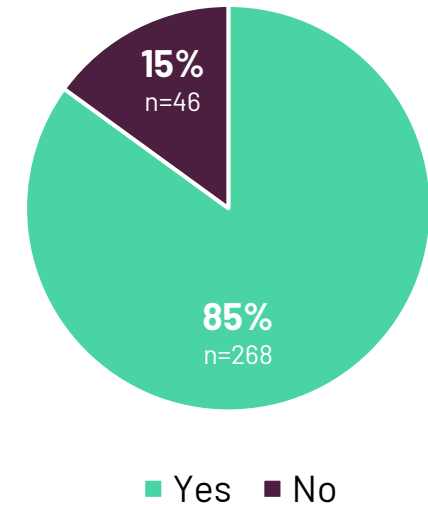


**78%**  
Somewhat +  
Very Easy



- Very easy
- Somewhat easy
- Neither
- Somewhat difficult
- Very difficult

## Did you receive a FamilyBoost payment?



**QSUB1:** Have you ever applied for FamilyBoost? / **QSUB2A:** How easy or difficult was it to apply for FamilyBoost? / **QSUB3A:** Did you receive a FamilyBoost payment?

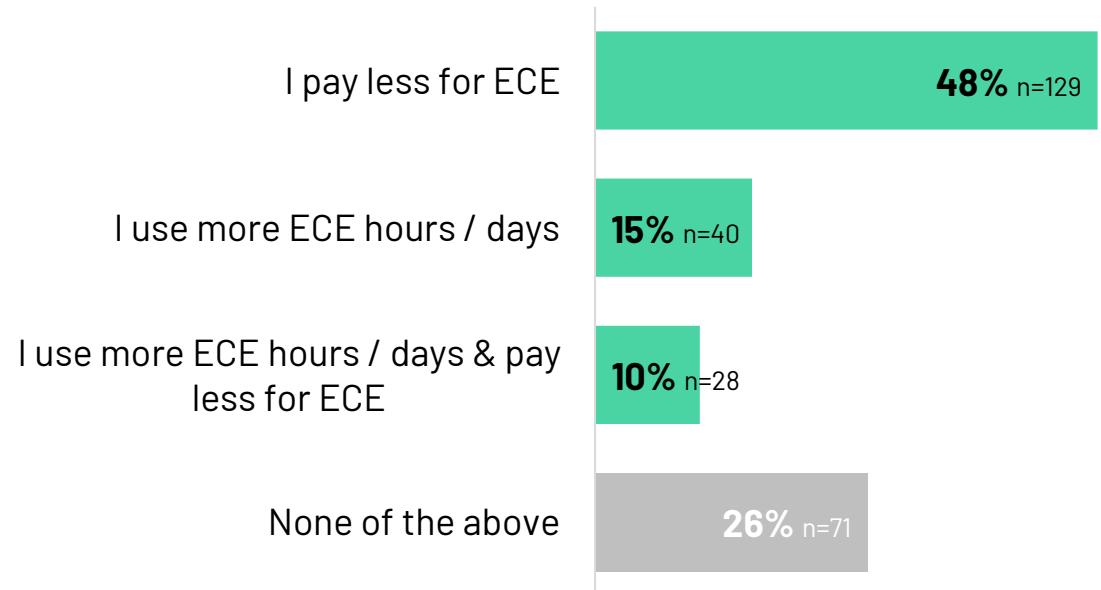
**Base:** Parents / caregivers of ECE-enrolled child(ren)(n=618); Parents / caregivers who applied for FamilyBoost (n=314)

# Impact of FamilyBoost payment

For those who received FamilyBoost, payment resulted in paying less for ECE, with a smaller proportion also increasing ECE hours.



## Impact of FamilyBoost payment



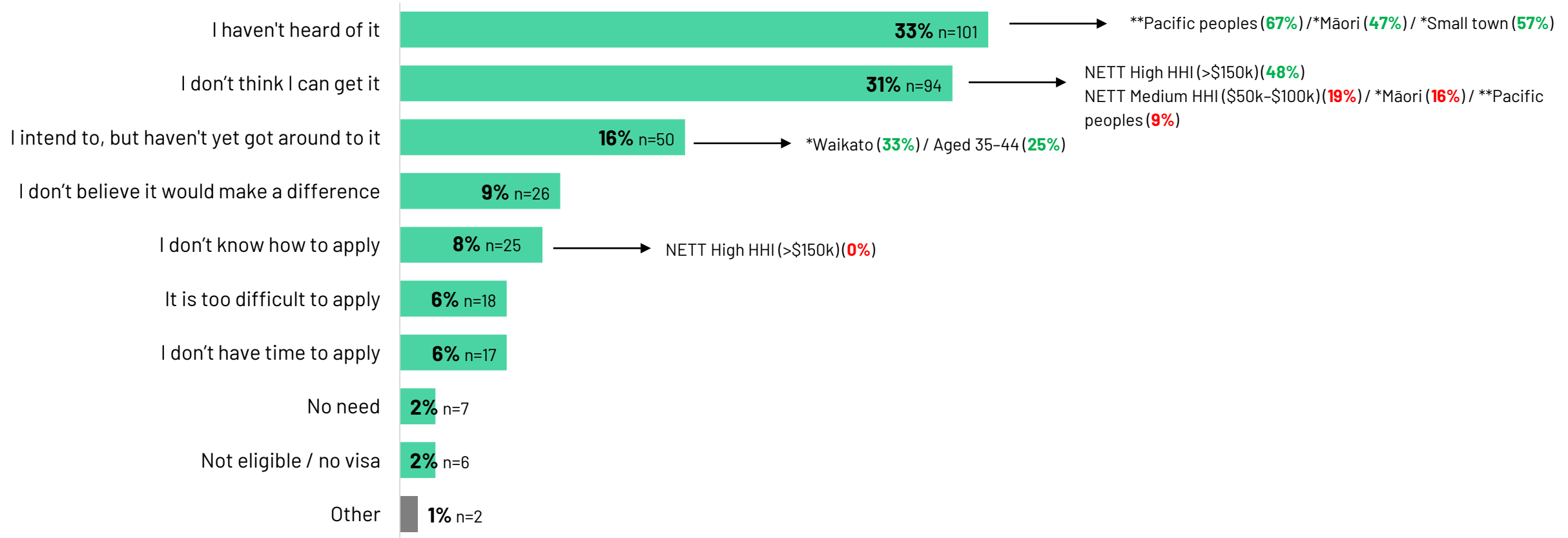
**QSUB4A:** What would you say has been the impact of receiving FamilyBoost payments?

**Base:** Parents / caregivers who received a FamilyBoost payment (n=268)

# Reasons why parents / caregivers didn't apply for FamilyBoost

Lack of awareness & perceived ineligibility are the leading reasons cited for not applying for FamilyBoost.

## Reasons parents / caregivers have not applied for FamilyBoost



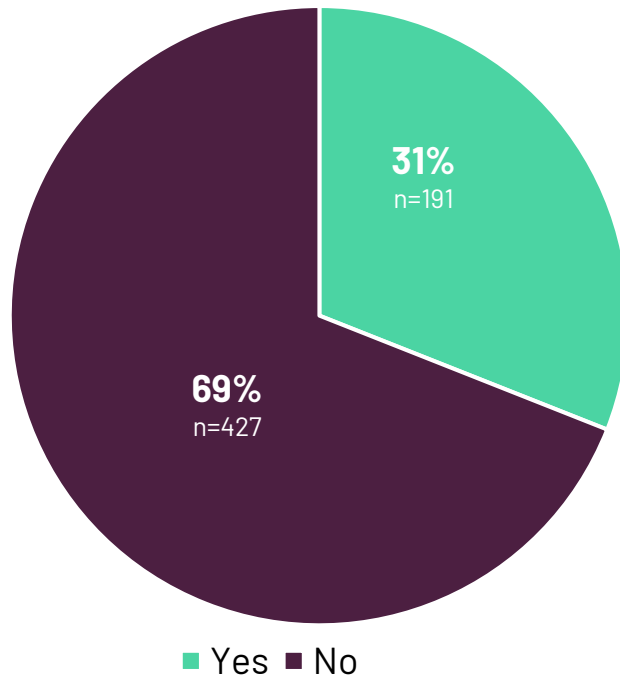
**QSUB2B:** Why have you not applied for FamilyBoost?

**Base:** Total parents / caregivers who did not apply for FamilyBoost (n=304). **Caution:** Low base size (n<100\*), (n<50\*\*).

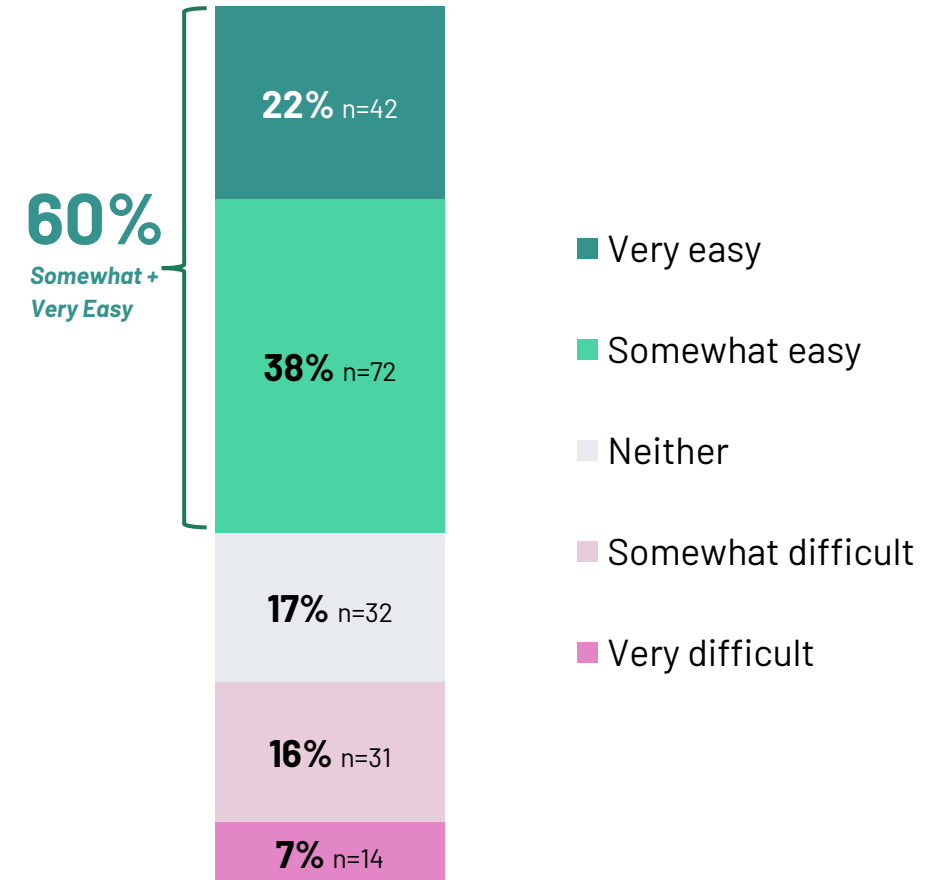
# Support from Work & Income

Nearly one third of parents / caregivers have received ECE cost support from Work & Income, with a majority of applicants finding the process easy, though nearly a quarter found it difficult.

## Have you ever received help from Work & Income to pay for ECE?



## Difficulty applying for ECE costs from Work & Income



**QSUB5:** Have you ever received any help from Work and Income to pay for ECE specifically? / **QSUB6:** How easy or difficult was it to apply for help for ECE costs from Work and Income?

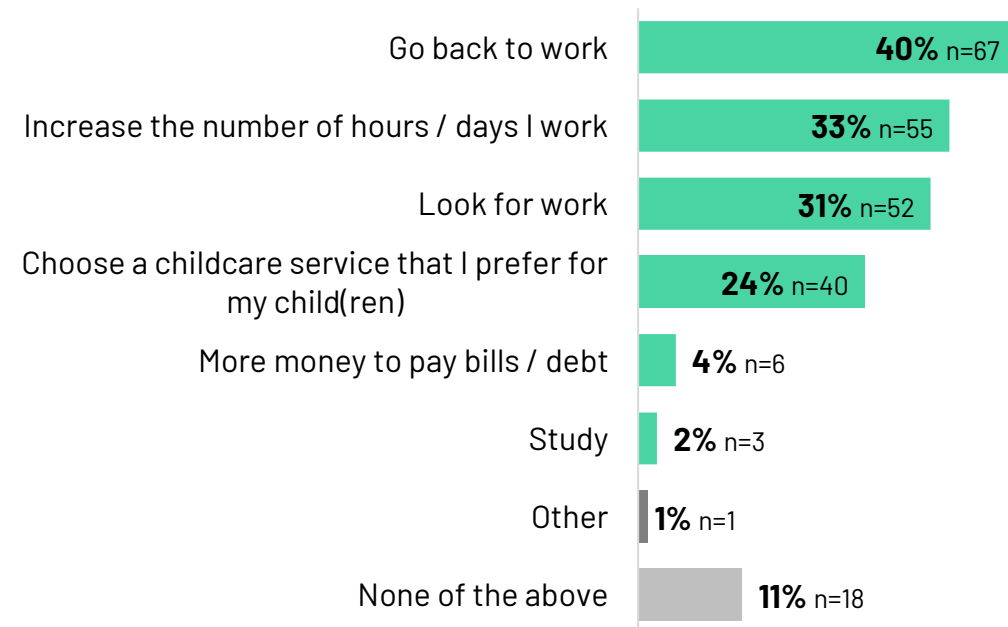
**Base:** Parents / caregivers of ECE-enrolled child(ren)(n=618); Parents / caregivers who received support from Work and Income (n=191)



# Impact of financial assistance from Work & Income

Financial assistance from Work & Income primarily supports parents / caregivers in their workforce participation, enabling them to go back to work, increase hours or look for employment.

## Impact of ECE costs from Work & Income



**QSUB8:** In which of the following ways, if any, has the financial assistance for ECE costs from Work and Income helped you?

**Base:** Parents / caregivers who received help from Work and Income to pay for ECE (n=168)

# THANK YOU

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