



Ministry of Education
Te Tāhuhu o te Mātauranga

EARLY CHILDHOOD EDUCATION FUNDING REVIEW

Business Survey 2026

April 2026



Key summary

Employees with ECE-aged children are having difficulty accessing childcare for their children. This impacts organisations and businesses, when parents and caregivers are absent from work, reduce their working hours, or have to leave the organisation altogether due to issues with ECE access.

Nearly half (47%) of employers report that they have had employees be absent from work because of childcare issues. Four in ten (42%) have had employees reduce their work hours because of challenges accessing care, and a similar proportion (40%) say that the current ECE system makes it difficult for their employees to return to work after parental leave.

Organisations are also impacted by their employees' struggles affording ECE, which affects the hours they are able to work.

Four in ten (43%) note that their employees have faced challenges related to the costs being too high. When asked specifically about challenges faced by their employees with ECE-aged children, one respondent is quoted as saying, "Government funding doesn't go far enough," and another, "They cannot afford to send their kids every day of the week." Over a third (36%) of employers report that employees have reduced their work hours because of issues affording childcare.

Employers report that challenges around ECE access and affordability have a negative effect on productivity, recruitment, retention, and diversity in the workforce.

Around a third (32%) of employers have incurred recruitment costs to replace an employee who has resigned due to issues accessing or affording ECE, with a similar proportion (30%) replacing employees who did not return to work after parental leave.

Similarly, around a third of employers agree that issues with ECE affordability and access have had negative impacts on their business's productivity (32%), and make it difficult for their business to hire and retain staff with the needed skills and experience (35%).

Issues with ECE access and affordability also impact on businesses' diversity, with 28% stating it has made it difficult to improve the gender diversity within their organisation.

Direct support for parents from employers is low, with only one in ten (9%) providing financial contributions to assist with childcare, and a similar proportion (11%) providing non-financial assistance. The provision of onsite childcare, or direct support of neighbouring ECE services, are not common.

Four in ten (41%) employers would not consider contributing financially or providing financial childcare-related benefits to their employees, while around three in ten (29%) would consider doing so. Organisations are far more amenable to providing non-financial than financial support for childcare, with four in ten (44%) saying they would consider non-financial support in the future. Currently around a third (30%) offer flexible hours to their employees with ECE-aged children, and one in ten (9%) allow remote work.

Providing childcare on-site in organisations is not a popular option; only 7% currently provide childcare on-site, and two thirds (65%) would not consider this in the future. Proactive support for nearby ECE services is also low, with nearly three quarters (76%) stating they have not supported the set-up or running of a nearby service, although around one in five (21%) would consider doing so in the future.

Support is generally high for future ECE investment policies, with four in ten (39%) supporting policy incentives, and a similar proportion (43%) supporting tax incentives for employer investment.

More than half (57%) believe that there is a need for increased government investment in ECE services to better support businesses. Around a quarter (26%) disagree that the current ECE system meets the needs of families, while around a third (31%) agree, and close to one in five (22%) disagree that it meets the needs of businesses/organisations.

Close to half (47%) agree that there is a greater need for employers to do more to support parents with ECE-aged children, however, only a quarter (25%) would consider investing financially to improve ECE access for their employees.

Contents

1

Background and objectives

2

Business and respondent profiles

3

Familiarity with ECE services

4

Support by businesses / organisations

5

Challenges faced by organisations and employees

6

Costs incurred for businesses

7

Opinions on ECE policies

01

BACKGROUND & OBJECTIVES

Background

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

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

- Parents / whānau
- 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 business / organisation decision-makers regarding ECE funding. The research collected insights into their experiences managing workforces affected by ECE access and affordability, as well as their views on the impact of the current funding system on productivity in their organisations. Additional data on the type of businesses involved, decision-making roles, and industry demographics were also gathered to provide a comprehensive understanding of their perspectives.



Methodology

Survey method: Online survey

Length of interview: 10 minutes

Fieldwork period: 19 January – 1 February 2026

Target: Hiring decision-makers for businesses / organisations with 20+ employees

Sample size: n=350

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' responses.

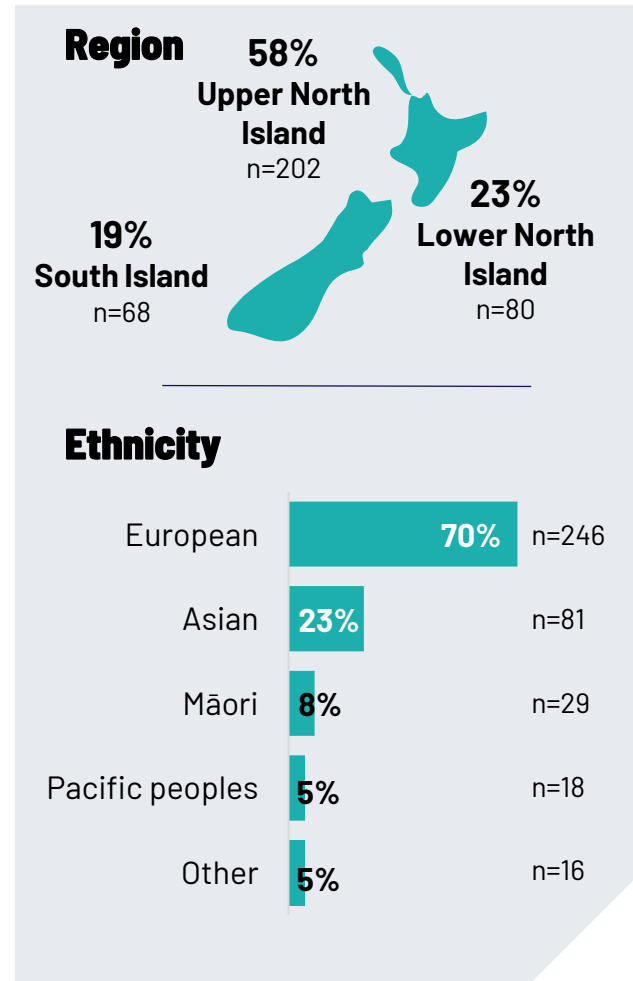
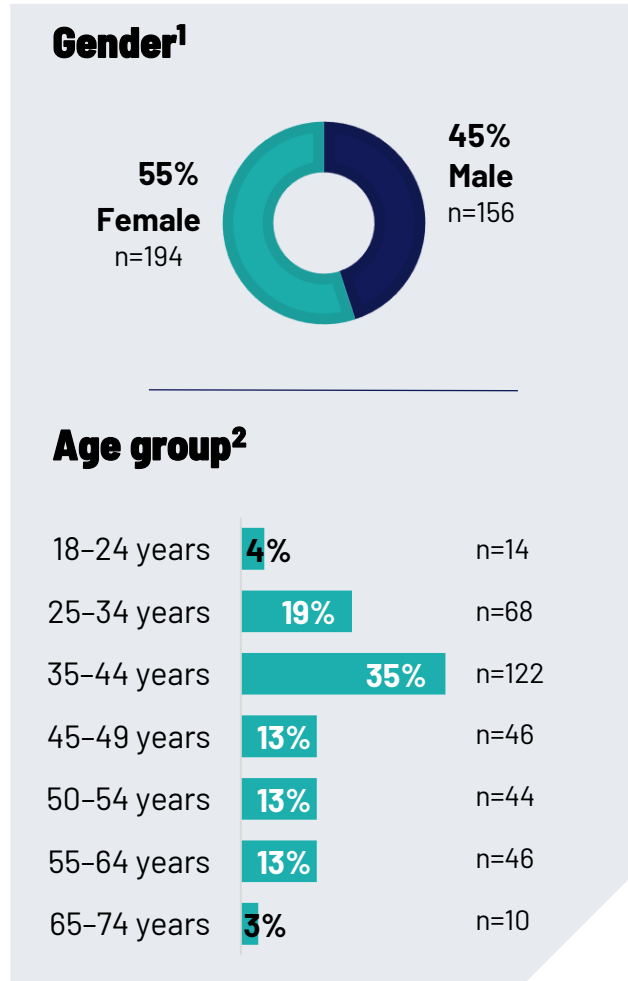
The maximum margin of error, at the 95% confidence level, is $\pm 3.5\%$.



02

BUSINESS PROFILE

Respondent profile

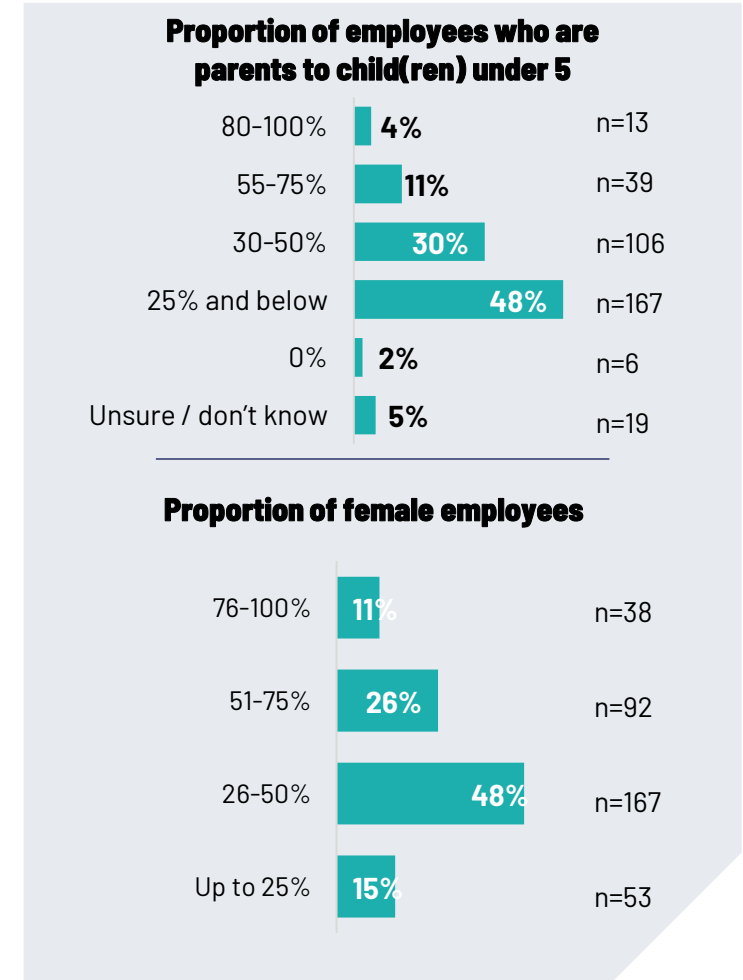
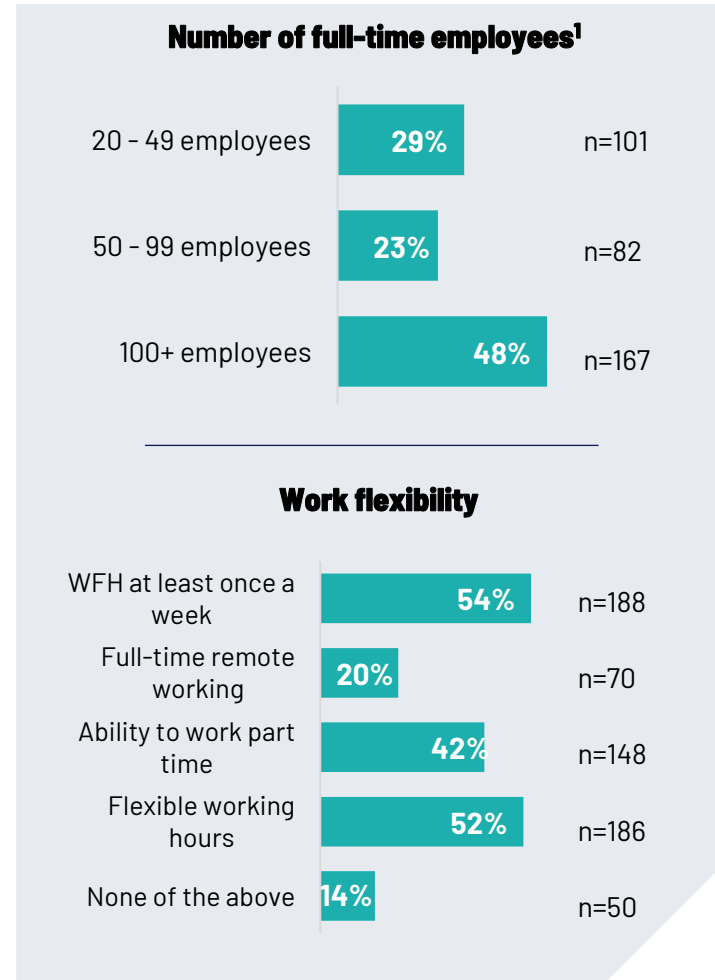
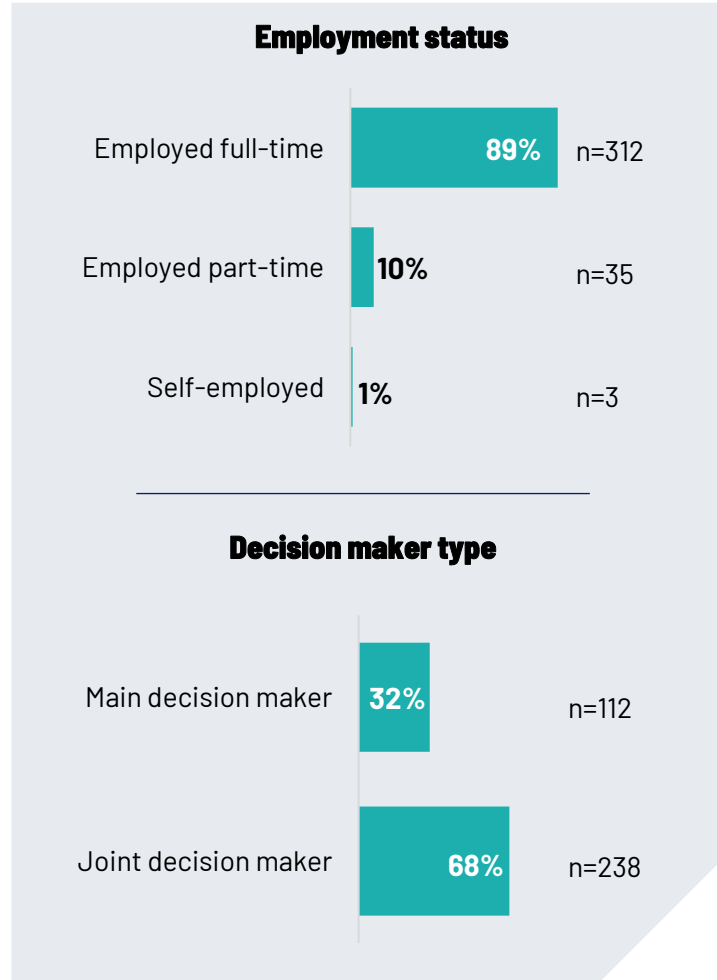


Northland	2%	n=6
Auckland	46%	n=162
Waikato	5%	n=18
Bay of Plenty	4%	n=15
Gisborne	0%	n=1
Hawke's Bay	2%	n=8
Taranaki	1%	n=5
Manawatū-Whanganui	3%	n=11
Wellington	16%	n=56
Nelson	0%	n=1
Tasman	0%	n=1
Marlborough	1%	n=3
West Coast	1%	n=2
Canterbury	13%	n=45
Otago	3%	n=12
Southland	1%	n=4

Base: All survey respondents (n=350). Caution: *Low base size (<100). **Very low base size (<50), indicative result only.

Notes: 1. No respondents selected 'Another gender' and 'Prefer not to answer'. 2. There were n=0 respondents aged 75 years+

Business profile



Base: All survey respondents (n=350). Caution: *Low base size (<100). **Very low base size (<50), indicative result only.; EMP01, QS1, QS2, QBP6, QBP7, QBP8,

Notes: 1. Those whose organisations had 1-5 and 6-19 employees were excluded from this survey.

Business profile

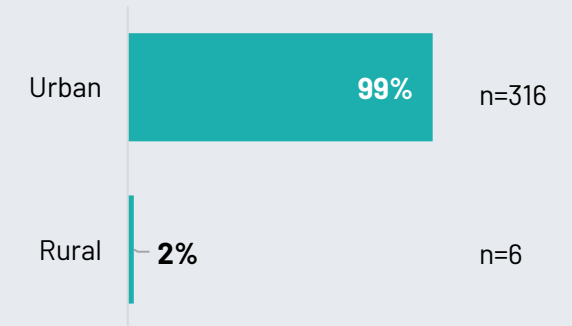
Regions business operates in

Northland	4%	n=14
Auckland	46%	n=160
Waikato	6%	n=20
Bay of Plenty	6%	n=20
Gisborne	1%	n=2
Hawke's Bay	3%	n=9
Taranaki	2%	n=7
Manawatu-Wanganui	3%	n=10
Wellington	18%	n=63
Nelson	1%	n=5
Tasman	0%	n=1
Marlborough	1%	n=2
West Coast	1%	n=4
Canterbury	15%	n=53
Otago	5%	n=16
Southland	2%	n=6
Nationwide	9%	n=32

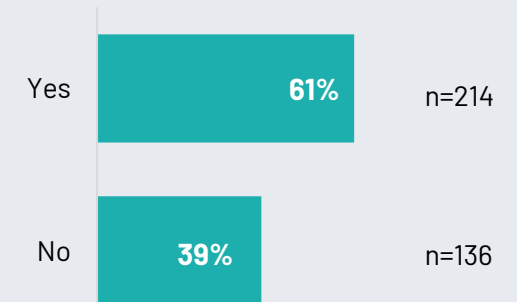
Main region of operation

Northland	1%	n=5
Auckland	49%	n=173
Waikato	3%	n=12
Bay of Plenty	4%	n=14
Gisborne	0%	n=1
Hawke's Bay	2%	n=8
Taranaki	1%	n=5
Manawatu-Wanganui	3%	n=9
Wellington	17%	n=59
Tasman	0%	n=1
Nelson	0%	n=1
Marlborough	0%	n=1
West Coast	1%	n=2
Canterbury	12%	n=43
Otago	3%	n=12
Southland	1%	n=4

Urban / rural location



Non-standard operating hours



Base: All survey respondents (n=350). Caution: *Low base size (<100). **Very low base size (<50), indicative result only.; QBP2, QBP3, QBP4, QBP5

Business profile

Industry or sector		
Agriculture, Forestry, and Fishing	1%	n=4
Mining	0%	n=1
Manufacturing	8%	n=29
Electricity, Gas, Water, and Waste Services	1%	n=5
Construction	7%	n=26
Wholesale Trade	2%	n=6
Retail Trade	9%	n=30
Accommodation and Food Services	3%	n=12
Transport, Postal and Warehousing	7%	n=24
Information Media and Telecommunications	6%	n=20
Financial and Insurance Services	5%	n=19
Rental, Hiring and Real Estate Services	1%	n=5
Professional, Scientific, and Technical Services	10%	n=36
Administrative and Support Services	4%	n=14
Public Administration and Safety	7%	n=26
Education and Training	11%	n=38
Health Care and Social Assistance	13%	n=44
Arts and Recreation Services	3%	n=9
Other	1%	n=2

Diversity and inclusion programs		
We have established diversity and inclusion programmes and policies to support the recruitment, retention, and career progression of our employees	57%	n=201
We are in the process of establishing diversity and inclusion programmes and policies	18%	n=64
We do not currently have any diversity and inclusion programmes and policies in place, but have plans to establish them	9%	n=31
We do not currently have any diversity inclusion programmes and policies in place, and do not have any plans to establish them in the near future	7%	n=25
Unsure / don't know	8%	n=29

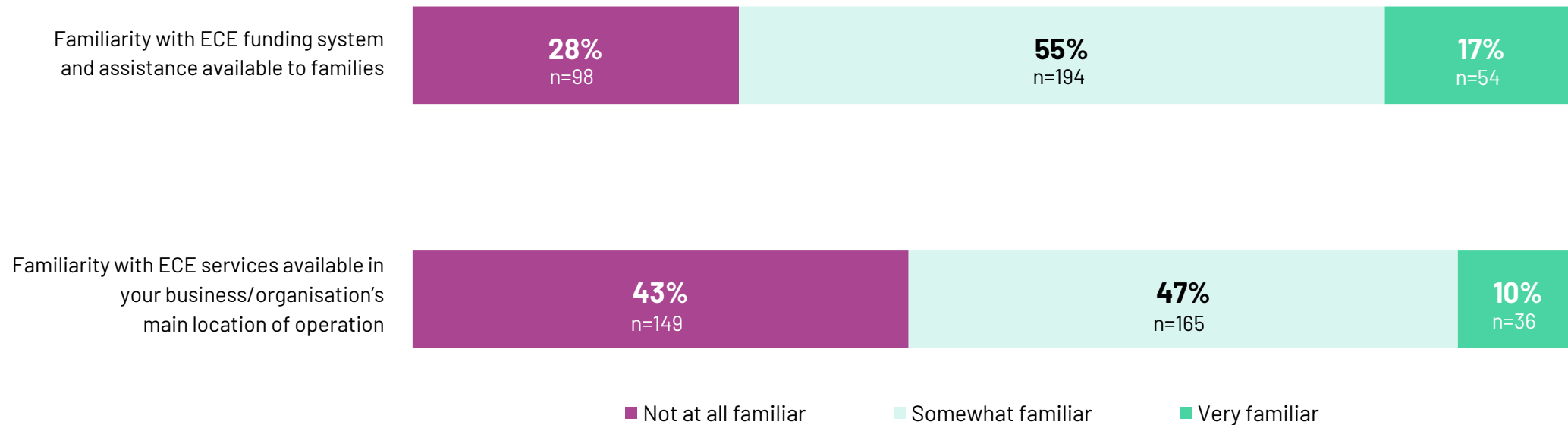
Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.; QBP1, QBP9

03

FAMILIARITY WITH ECE SERVICES

Familiarity with ECE funding and services

Close to three quarters (72%) of decision makers report that they are familiar with the ECE funding system available to families, though fewer (57%) report being familiar with ECE services available near their business / organisation's location of operation.



QECE1: How familiar are you with the early childhood education (ECE) funding system and assistance that are available to families?

QECE2: And how familiar are you with ECE services available in your business's / organisation's main location of operation?

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Familiarity with ECE funding and services

Familiarity with ECE services is fairly consistent across business profiles, but larger organisations report lower familiarity than smaller ones with both the ECE funding system and assistance available to families (14% vs 19%), and with ECE services available within their own organisation (7% vs 12%).

		Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours			
		Total	20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total		350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Familiarity with ECE funding system and assistance available to families	Not at all familiar	28%	27%	24%	31%	29%	26%	27%	30%	29%	24%	29%	50%	28%	26%	31%	8%	37%	29%	26%
	Somewhat familiar	55%	54%	56%	56%	54%	56%	59%	45%	55%	65%	47%	50%	53%	56%	59%	69%	63%	57%	52%
	Very familiar	17%	19%	20%	14%	17%	19%	14%	25%	16%	11%	24%	0%	19%	18%	10%	23%	0%	13%	22%
Familiarity with ECE services available in your business/organisation	Not at all familiar	43%	49%	38%	41%	40%	47%	45%	53%	40%	43%	37%	83%	46%	36%	41%	38%	47%	43%	43%
	Somewhat familiar	47%	40%	48%	51%	50%	42%	45%	32%	50%	53%	42%	17%	44%	51%	51%	46%	53%	50%	43%
	Very familiar	10%	12%	15%	7%	10%	11%	9%	15%	10%	3%	21%	0%	10%	13%	8%	15%	0%	8%	14%

QECE1: How familiar are you with the early childhood education (ECE) funding system and assistance that are available to families?

QECE2: And how familiar are you with ECE services available in your business's / organisation's main location of operation?

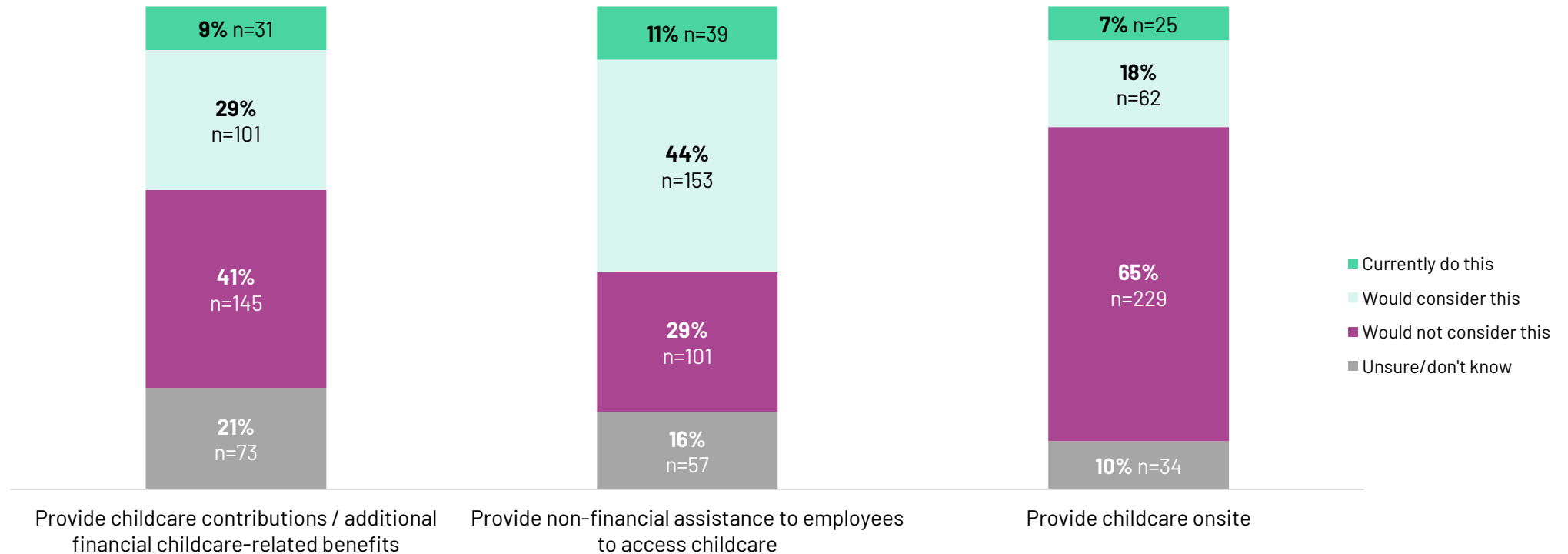
Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

04

SUPPORT BY BUSINESSES / ORGANISATIONS

Actions to support employee access to childcare

Very few businesses / organisations currently provide childcare assistance through financial benefits, non-financial assistance, or onsite childcare. Some would consider providing non-financial assistance (44%), but financial assistance and onsite childcare are less popular options.



QECE3: Does your business / organisation currently undertake, or would consider, the following actions to support employee access to childcare / ECE?

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Actions to support employee access to childcare

Results are fairly consistent across business profiles.

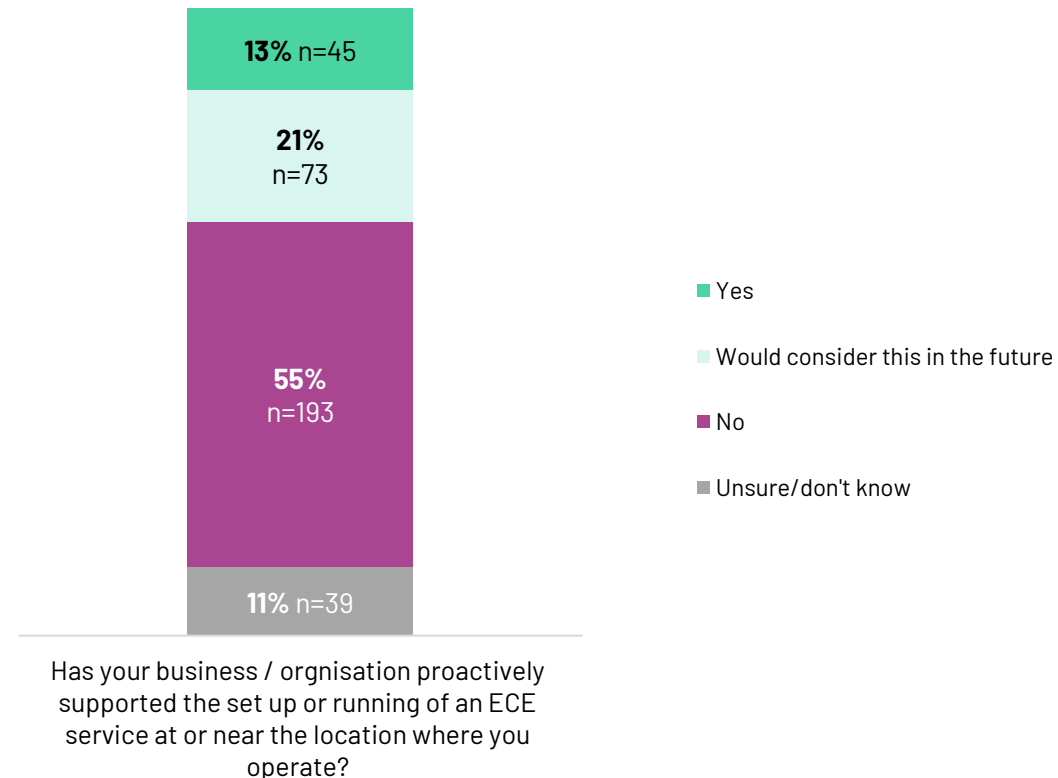
		Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers						Operate in non-standard hours		
		Total	20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Provide childcare contributions / additional financial childcare-related benefits	Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
	Currently do this	9%	8%	10%	9%	9%	10%	8%	8%	10%	11%	3%	0%	8%	8%	15%	8%	16%	10%	7%
	Would consider this	29%	28%	30%	29%	29%	25%	33%	30%	33%	23%	24%	17%	30%	32%	28%	23%	11%	27%	32%
	Would not consider this	41%	43%	40%	41%	43%	37%	42%	40%	39%	42%	53%	67%	40%	46%	36%	31%	37%	41%	43%
	Unsure / don't know	21%	22%	20%	21%	19%	28%	17%	23%	19%	24%	21%	17%	22%	14%	21%	38%	37%	22%	18%
Provide non-financial assistance to employees to access childcare	Currently do this	11%	9%	10%	13%	14%	7%	8%	4%	15%	10%	8%	0%	10%	13%	13%	8%	11%	11%	12%
	Would consider this	44%	49%	48%	39%	45%	37%	47%	51%	42%	39%	53%	33%	44%	47%	49%	38%	21%	40%	49%
	Would not consider this	29%	29%	28%	29%	27%	33%	30%	23%	30%	32%	26%	67%	31%	26%	23%	31%	26%	30%	27%
	Unsure / don't know	16%	14%	15%	19%	14%	22%	16%	23%	13%	20%	13%	0%	16%	13%	15%	23%	42%	19%	12%
Provide childcare onsite	Currently do this	7%	7%	7%	7%	7%	7%	8%	4%	8%	9%	5%	0%	5%	9%	8%	15%	5%	8%	6%
	Would consider this	18%	18%	20%	17%	18%	16%	19%	13%	23%	13%	13%	0%	19%	17%	21%	23%	5%	16%	20%
	Would not consider this	65%	68%	62%	65%	65%	67%	66%	74%	58%	71%	74%	100%	65%	65%	64%	54%	74%	64%	67%
	Unsure / don't know	10%	7%	11%	11%	10%	10%	8%	9%	11%	8%	8%	0%	11%	8%	8%	8%	16%	11%	7%

QECE3: Does your business / organisation currently undertake, or would consider, the following actions to support employee access to childcare / ECE?

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Support for ECE services located near businesses / organisations

Most businesses / organisations (55%) have not supported the set up or running of an early childhood education service near them.



QECE4: Has your business / organisation proactively supported the set up or running of an ECE service at or near the location where you operate (e.g. supported a resource consent application, opened a service in close proximity, provide space for ECE services)?

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Support for ECE services near location of operations

Larger businesses / organisations are more likely than smaller ones, to have supported the set-up / running of ECE services. Those with a lower proportion of female employees are more likely to consider this in the future.

Proactively supported the set up/ running of ECE service	Number of employees				Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
	Total	20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Yes	13%	10%	12%	15%	13%	14%	12%	11%	17%	9%	8%	0%	12%	15%	15%	15%	5%	15%	9%
No	55%	53%	54%	57%	52%	56%	66%	49%	49%	64%	68%	83%**	59%	48%	41%	54%	79%	54%	57%
We would consider this in the future	21%	22%	26%	18%	23%	20%	16%	30%	23%	14%	13%	17%	20%	23%	28%	15%	5%	20%	22%
Unsure / don't know	11%	15%	9%	10%	13%	11%	6%	9%	11%	13%	11%	0%	8%	14%	15%	15%	11%	10%	12%

QECE4: Has your business / organisation proactively supported the set up or running of an ECE service at or near the location where you operate (e.g. supported a resource consent application, opened a service in close proximity, provide space for ECE services)?

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Other actions taken to support employee access to childcare

Just under a third (30%) of businesses / organisations offer flexible hours to their employees to support childcare.

Other forms of support (open-ended response) – coded

Flexible hours	30%	n=24
Flexibility in general	10%	n=8
General support for employees	10%	n=8
Allowing remote work / working from home	9%	n=7
Allowing employees to bring children to work	7%	n=6
Offering financial support	7%	n=6
Allowing part time work	5%	n=4
Allowing other forms of leave	5%	n=4
Nothing / no support is given to employees	17%	n=14
Other	6%	n=5
Don't know	1%	n=1



We support flexible working including WFH, flexible start and finish times and part-time working. We are highly unlikely to offer any further support for parents including those with pre-school aged children.

We pay our employees more than industry standard salaries to help with the current distorted cost of living.

Short notice replacement of job responsibilities if parent called away, including fathers, not just mothers. Parents have a good set of options when it comes to their children, like using their break to pick up and drop off kids from school and day care.

It's not the business's responsibility.

We give them freedom to leave when they want, especially for their family matters.



QECE5: Aside from the actions that were previously mentioned, is there anything else that your business / organisation does to support employee access to childcare / ECE? Please explain in as much detail as you like.

Base: Verbatim responses to QECE5 (n=81). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Other actions taken to support employee access to childcare

Other actions to support employee access	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers						Operate in non-standard hours		
	Total*	20-49**	50-99**	100+**	NET Upper NI*	NET Lower NI**	NET South Island*	NET Up to 25%**	NET 26-50%**	NET 51-75%**	NET 76-100%**	NET 0%**	NET Up to 25%**	NET 30-50%**	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes*	No**
Total	81*	22**	27**	32**	53*	15**	13**	17**	36**	20**	8**	0**	36**	29**	11**	2**	3**	54*	27**
Flexible hours	30%	18%	19%	47%	28%	33%	31%	29%	19%	40%	50%	-	36%	28%	18%	50%	0%	20%	48%
Flexibility in general	10%	14%	15%	3%	11%	7%	8%	6%	8%	20%	0%	-	6%	10%	27%	0%	0%	11%	7%
General support for employees	10%	5%	19%	6%	8%	20%	8%	6%	14%	10%	0%	-	11%	3%	27%	0%	0%	13%	4%
Allowing remote work/ working from home	9%	5%	0%	19%	9%	13%	0%	12%	11%	5%	0%	-	8%	10%	9%	0%	0%	7%	11%
Allowing employees to bring children to work	7%	5%	15%	3%	9%	0%	8%	6%	8%	5%	12%	-	6%	3%	18%	50%	0%	7%	7%
Offering financial support	7%	9%	4%	9%	8%	0%	15%	12%	6%	5%	12%	-	3%	14%	9%	0%	0%	9%	4%
Allowing part time work	5%	5%	4%	6%	4%	13%	0%	0%	6%	10%	0%	-	8%	3%	0%	0%	0%	6%	4%
Allowing other forms of leave	5%	0%	11%	3%	4%	7%	8%	6%	3%	10%	0%	-	8%	3%	0%	0%	0%	6%	4%
Nothing / no support is given to employees	17%	32%	7%	16%	19%	13%	15%	24%	22%	5%	12%	-	17%	17%	9%	0%	67%	20%	11%
Other	6%	5%	7%	6%	2%	13%	15%	12%	6%	5%	0%	-	6%	7%	0%	0%	33%	9%	0%
Don't know	1%	5%	0%	0%	2%	0%	0%	0%	3%	0%	0%	-	3%	0%	0%	0%	0%	2%	0%

QECE5: Aside from the actions that were previously mentioned, is there anything else that your business / organisation does to support employee access to childcare / ECE? Please explain in as much detail as you like.

Base: Verbatim responses to QECE5 (n=81). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.



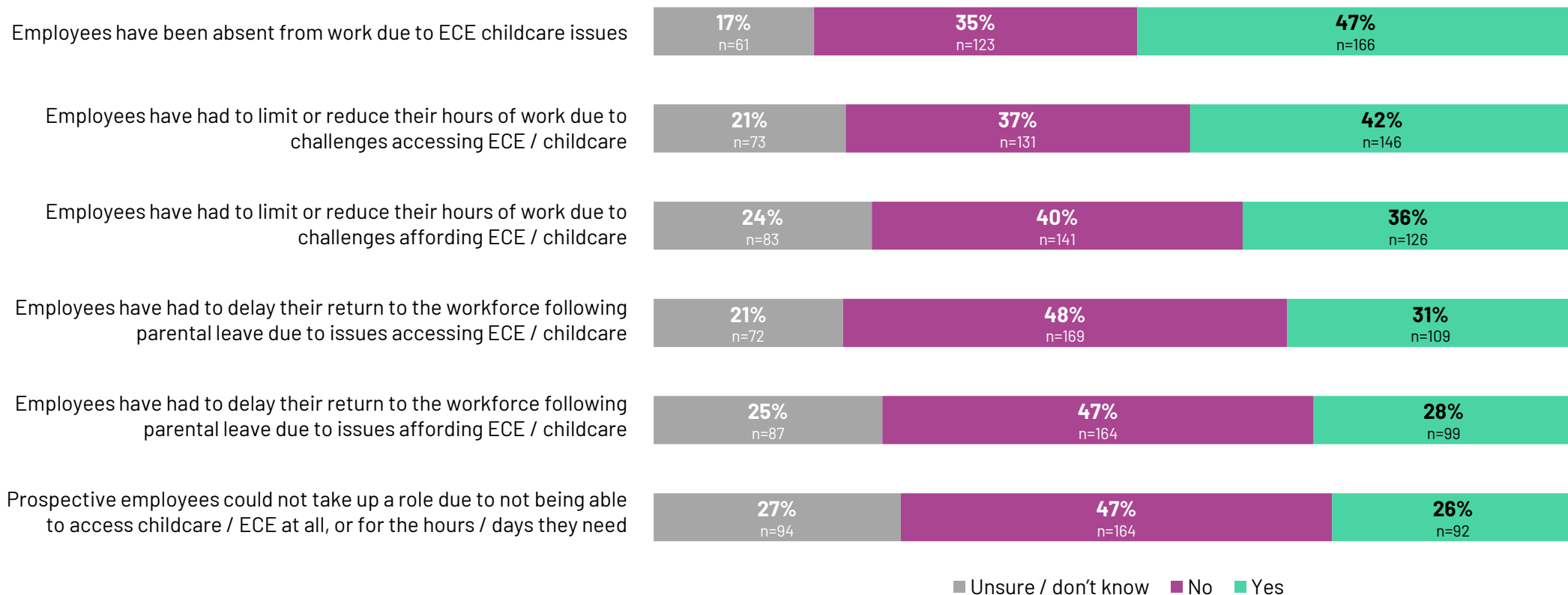
05

CHALLENGES FACED BY ORGANISATIONS AND EMPLOYEES

Childcare challenges faced by employees

Close to half (47%) report that employees have been absent from work due to childcare issues within the last year. Many also report employees reducing their hours due to challenges accessing (42%) or affording (36%) childcare.

Employee ECE / childcare challenges



QECE6: To the best of your knowledge, in the past 12 months, has the following been an issue for any of your employees?

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Childcare challenges faced by employees (1/2)

Results are largely similar across groups.

		Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours			
		Total	20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%**	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Employees have had to delay their return to the workforce following parental leave due to issues accessing ECE / childcare	Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
	Yes	31%	30%	30%	32%	27%	35%	39%	36%	31%	29%	32%	17%	32%	33%	41%	15%	11%	35%	25%
	No	48%	55%	52%	42%	48%	47%	50%	51%	50%	42%	53%	83%	53%	46%	36%	38%	42%	43%	57%
Employees have had to delay their return to the workforce following parental leave due to issues affording ECE / childcare	Unsure / don't know	21%	15%	17%	26%	24%	19%	11%	13%	20%	28%	16%	0%	16%	21%	23%	46%	47%	22%	18%
	Yes	28%	27%	28%	29%	28%	30%	27%	32%	26%	28%	32%	0%	28%	31%	33%	23%	16%	28%	29%
	No	47%	56%	52%	38%	45%	47%	52%	47%	50%	39%	50%	83%	49%	46%	41%	46%	32%	46%	49%
Employees have had to limit or reduce their hours of work due to challenges accessing ECE / childcare	Unsure / don't know	25%	17%	20%	32%	26%	23%	22%	21%	23%	33%	18%	17%	23%	23%	26%	31%	53%	26%	23%
	Yes	42%	37%	33%	49%	39%	49%	42%	32%	41%	48%	45%	17%	41%	45%	41%	31%	42%	41%	43%
	No	37%	43%	48%	29%	38%	35%	41%	38%	40%	33%	37%	67%	39%	36%	38%	46%	16%	34%	43%
Employees have had to limit or reduce their hours of work due to challenges accessing ECE / childcare	Unsure / don't know	21%	21%	20%	22%	24%	16%	17%	30%	19%	20%	18%	17%	20%	19%	21%	23%	42%	25%	15%

Red / green indicates significantly lower / higher than Total

QECE6: To the best of your knowledge, in the past 12 months, has the following been an issue for any of your employees?

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Childcare challenges faced by employees (2/2)

Results are largely similar across groups.

		Number of employees				Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
		Total	20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Employees have had to limit or reduce their hours of work due to challenges affording ECE/ childcare	Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
	Yes	36%	30%	35%	40%	33%	42%	39%	32%	35%	38%	39%	17%	36%	38%	36%	31%	37%	34%	39%
	No	40%	49%	45%	33%	40%	42%	41%	45%	43%	36%	34%	83%	43%	37%	38%	54%	21%	39%	43%
Employees have been absent from work due to ECE childcare issues	Unsure / don't know	24%	22%	20%	27%	28%	16%	20%	23%	22%	26%	26%	0%	22%	25%	26%	15%	42%	27%	18%
	Yes	47%	39%	44%	54%	42%	54%	55%	45%	44%	55%	47%	17%	46%	51%	49%	46%	53%	47%	48%
	No	35%	43%	43%	27%	40%	28%	30%	42%	37%	25%	42%	67%	39%	31%	36%	38%	11%	33%	39%
Prospective employees could not take up a role due to not being able to access childcare/ ECE at all, or for the hours/ days they need	Unsure / don't know	17%	19%	13%	19%	18%	17%	16%	13%	19%	20%	11%	17%	16%	18%	15%	15%	37%	20%	13%
	Yes	26%	24%	22%	30%	26%	30%	23%	38%	22%	27%	29%	17%	26%	31%	28%	8%	16%	28%	24%
	No	47%	56%	63% ▲	33% ▼	48%	40%	53%	51%	48%	41%	50%	67%	54%	41%	38%	54%	21%	43%	52%
Prospective employees could not take up a role due to not being able to access childcare/ ECE at all, or for the hours/ days they need	Unsure / don't know	27%	20%	15%	37%	26%	31%	23%	11%	31%	32%	21%	17%	20%	28%	33%	38%	63%	29%	24%

Red / green indicates significantly lower / higher than Total

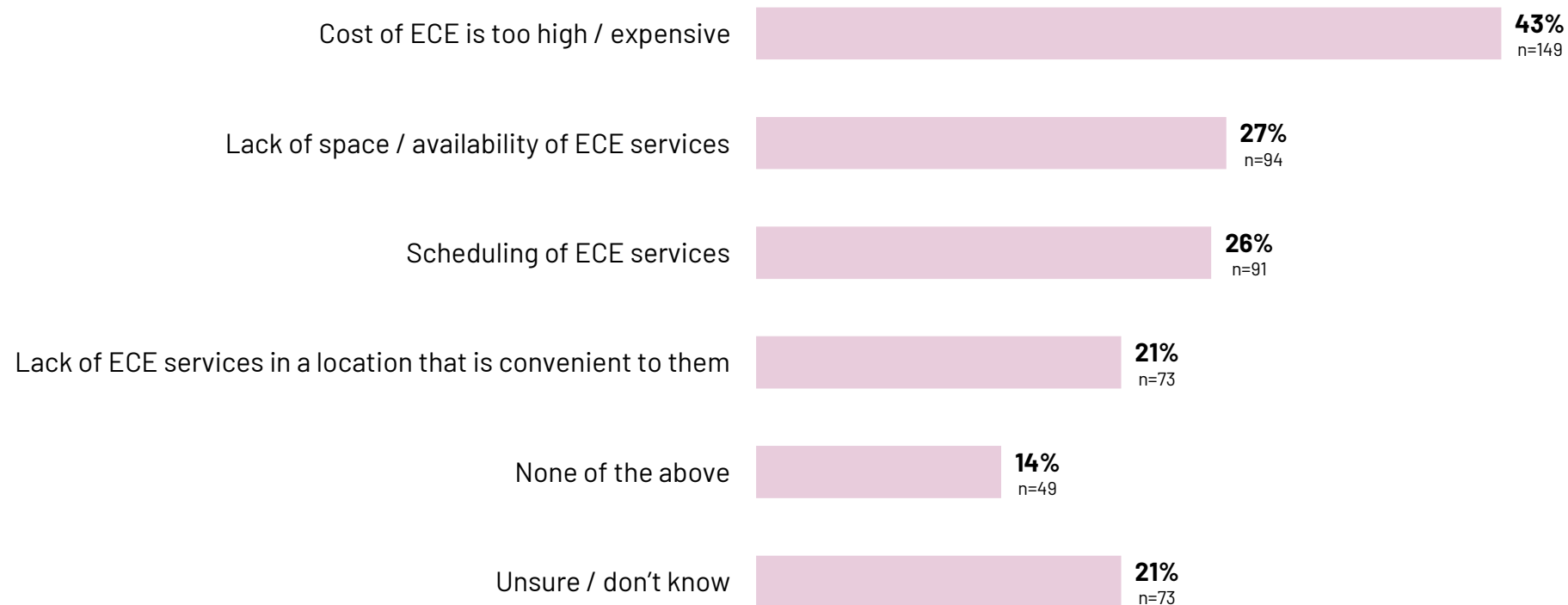
QECE6: To the best of your knowledge, in the past 12 months, has the following been an issue for any of your employees?

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Participation challenges facing employees with ECE-aged children

Many employers (43%) report that their employees have faced challenges returning to work due to high childcare costs. A similar proportion have struggled with ECE services being unavailable (27%) and difficulties with scheduling (26%).

Employee challenges affecting workforce participation



QECE7: To the best of your knowledge, have your employees with ECE-aged children faced any of the following challenges when either returning to work or while already in the workforce?
Please select all that apply.

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only. **Note:** Other (0%) not included.

Challenges facing employees with ECE-aged children

High childcare costs are noted as an issue more often in the lower North Island (56%).

Challenges faced when returning to work or while in workforce	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours			
	Total	20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Cost of ECE is too high / expensive	43%	41%	43%	44%	40%	56% ▲	36%	51%	36%	49%	45%	50%	42%	46%	44%	31%	32%	41%	45%
Lack of space / availability of ECE services	27%	20%	30%	29%	27%	36%	16%	13% ▼	28%	29%	37%	33%	21%	41% ▲	18%	38%	11%	26%	28%
Scheduling of ECE services	26%	20%	26%	30%	28%	26%	19%	26%	29%	22%	21%	17%	25%	24%	46% ▲	31%	5%	27%	25%
Lack of ECE services in a location that is convenient to them	21%	21%	23%	20%	20%	26%	16%	21%	19%	24%	21%	17%	21%	24%	26%	15%	0%	21%	21%
None of the above	14%	21%	15%	10%	13%	14%	19%	17%	12%	15%	16%	50%	16%	10%	13%	23%	5%	13%	16%
Other	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	3%	0%	0%	0%	0%
Unsure / don't know	21%	17%	20%	24%	21%	17%	25%	15%	21%	23%	24%	0%	19%	18%	18%	31%	58%	21%	21%

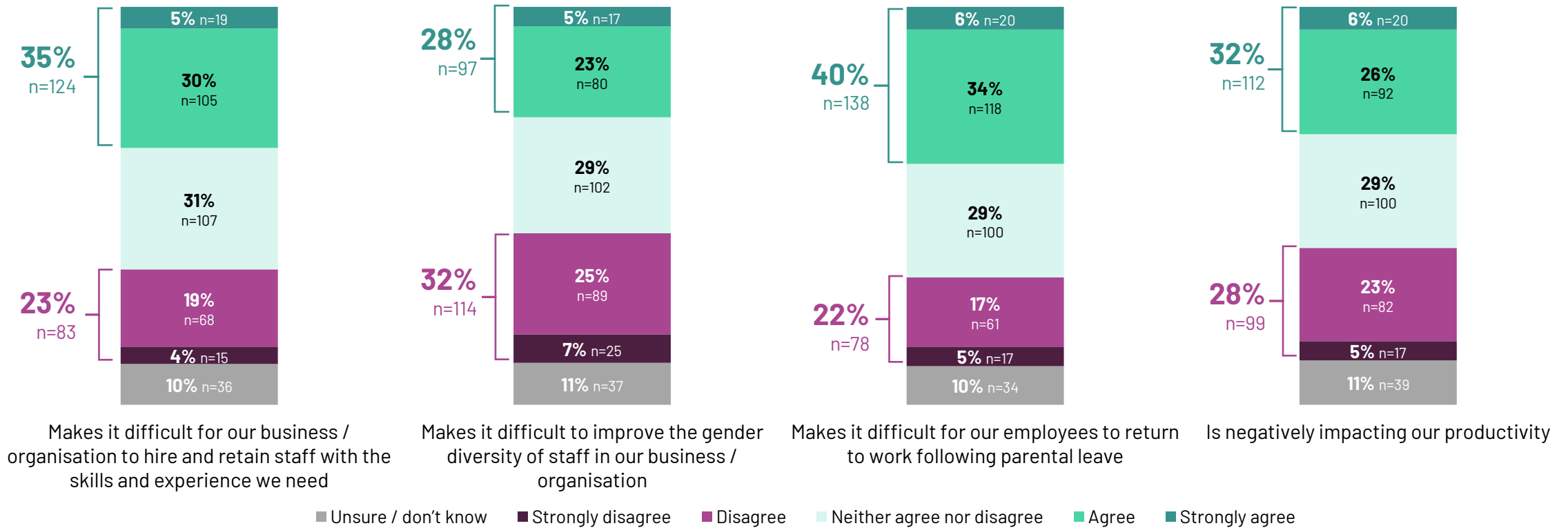
Red / green indicates significantly lower / higher than Total

QECE7: To the best of your knowledge, have your employees with ECE-aged children faced any of the following challenges when either returning to work or while already in the workforce? Please select all that apply.

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Challenges faced by businesses / organisations relating to employees with ECE-aged children

Businesses / organisations face hiring, diversity and productivity challenges relating to employees with ECE-aged children, with just under a third (32%) reporting a negative impact on productivity.



QECE8: Below are some statements about the challenges some businesses and organisations may experience relating to their employees with ECE-aged children within the current ECE system. How much do you agree or disagree with the following?

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Challenges faced by businesses / organisations relating to employees with ECE-aged children

Difficult to hire and retain staff with needed skills and experience	Total	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
		20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Strongly agree	5%	6%	6%	5%	5%	7%	5%	9%	7%	1%	5%	17%	7%	4%	8%	0%	0%	5%	7%
Agree	30%	30%	26%	32%	29%	31%	31%	36%	28%	32%	29%	33%	29%	30%	36%	31%	21%	31%	28%
Neither agree nor disagree	31%	30%	34%	29%	32%	28%	28%	28%	35%	26%	24%	33%	31%	32%	28%	31%	26%	32%	29%
Disagree	19%	26%	18%	16%	20%	20%	19%	13%	17%	25%	26%	17%	23%	17%	13%	23%	16%	18%	22%
Strongly disagree	4%	1%	9%	4%	4%	5%	5%	8%	2%	7%	3%	0%	4%	5%	5%	8%	0%	5%	4%
Unsure / don't know	10%	8%	7%	13%	10%	9%	12%	6%	11%	10%	13%	0%	7%	12%	10%	8%	37%	10%	11%
NET Agree	35%	36%	32%	37%	34%	38%	36%	45%	34%	33%	34%	50%	36%	34%	44%	31%	21%	36%	35%
NET Disagree	24%	27%	27%	20%	23%	25%	23%	21%	19%	32%	29%	17%	27%	22%	18%	31%	16%	22%	26%

QCEB8: Below are some statements about the challenges some businesses and organisations may experience relating to their employees with ECE-aged children within the current ECE system. How much do you agree or disagree with the following?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Challenges faced by businesses / organisations relating to employees with ECE-aged children

Difficult to improve gender diversity of staff	Total	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
		20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Strongly agree	5%	6%	4%	5%	5%	6%	2%	11%	5%	2%	3%	17%	4%	6%	5%	0%	5%	6%	4%
Agree	23%	18%	18%	28%	25%	21%	17%	25%	24%	21%	21%	0%	26%	18%	33%	8%	21%	21%	26%
Neither agree nor disagree	29%	33%	33%	25%	30%	22%	36%	28%	31%	28%	24%	33%	31%	30%	26%	8%	26%	29%	29%
Disagree	25%	31%	27%	22%	22%	33%	27%	17%	22%	33%	34%	50%	22%	30%	15%	54%	21%	25%	26%
Strongly disagree	7%	3%	12%	7%	7%	9%	6%	9%	5%	8%	11%	0%	8%	7%	8%	15%	0%	9%	4%
Unsure / don't know	11%	10%	6%	13%	11%	9%	12%	9%	13%	9%	8%	0%	9%	9%	13%	15%	26%	11%	10%
NET Agree	28%	24%	22%	33%	31%	27%	19%	36%	29%	23%	24%	17%	30%	24%	38%	8%	26%	26%	30%
NET Disagree	33%	34%	39%	29%	29%	42%	33%	26%	28%	40%	45%	50%	30%	37%	23%	69%	21%	34%	31%

QCEB8: Below are some statements about the challenges some businesses and organisations may experience relating to their employees with ECE-aged children within the current ECE system. How much do you agree or disagree with the following?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Challenges faced by businesses / organisations relating to employees with ECE-aged children

Difficult for employees to return to work following parental leave	Total	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
		20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Strongly agree	6%	5%	6%	6%	4%	9%	6%	6%	7%	2%	11%	17%	5%	5%	8%	8%	11%	6%	5%
Agree	34%	27%	33%	38%	33%	35%	34%	34%	35%	30%	37%	0%	32%	37%	38%	23%	42%	36%	31%
Neither agree nor disagree	29%	27%	32%	28%	34%	23%	19%	32%	28%	33%	18%	17%	32%	26%	28%	38%	11%	27%	32%
Disagree	17%	26%	20%	11%	16%	19%	20%	13%	17%	18%	24%	33%	20%	16%	10%	15%	11%	16%	19%
Strongly disagree	5%	4%	5%	5%	4%	5%	6%	8%	4%	8%	0%	17%	4%	7%	5%	0%	0%	6%	4%
Unsure / don't know	10%	12%	5%	11%	8%	10%	14%	8%	11%	9%	11%	17%	7%	9%	10%	15%	26%	10%	10%
NET Agree	39%	32%	39%	44%	38%	43%	41%	40%	41%	33%	47%	17%	37%	42%	46%	31%	53%	42%	36%
NET Disagree	22%	30%	24%	17%	20%	23%	27%	21%	20%	26%	24%	50%	25%	23%	15%	15%	11%	22%	23%

QCE8: Below are some statements about the challenges some businesses and organisations may experience relating to their employees with ECE-aged children within the current ECE system. How much do you agree or disagree with the following?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Challenges faced by businesses / organisations relating to employees with ECE-aged children

Negatively impacting productivity	Total	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
		20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Strongly agree	6%	3%	5%	8%	5%	9%	3%	2%	9%	3%	3%	0%	3%	6%	10%	15%	16%	7%	3%
Agree	26%	21%	20%	33%	24%	27%	33%	30%	25%	24%	34%	0%	26%	32%	21%	23%	16%	25%	28%
Neither agree nor disagree	29%	35%	30%	24%	33%	23%	22%	30%	28%	32%	24%	17%	27%	27%	41%	23%	32%	28%	29%
Disagree	23%	26%	33%	17%	22%	23%	27%	21%	25%	23%	24%	50%	28%	22%	13%	31%	0%	21%	26%
Strongly disagree	5%	3%	5%	6%	5%	5%	5%	8%	2%	8%	8%	17%	5%	4%	5%	0%	5%	6%	3%
Unsure / don't know	11%	13%	7%	12%	11%	12%	11%	9%	13%	11%	8%	17%	10%	9%	10%	8%	32%	12%	10%
NET Agree	32%	24%	24%	41%	29%	36%	36%	32%	34%	27%	37%	0%	29%	38%	31%	38%	32%	33%	31%
NET Disagree	28%	29%	38%	23%	27%	28%	31%	28%	26%	30%	32%	67%	34%	25%	18%	31%	5%	28%	29%

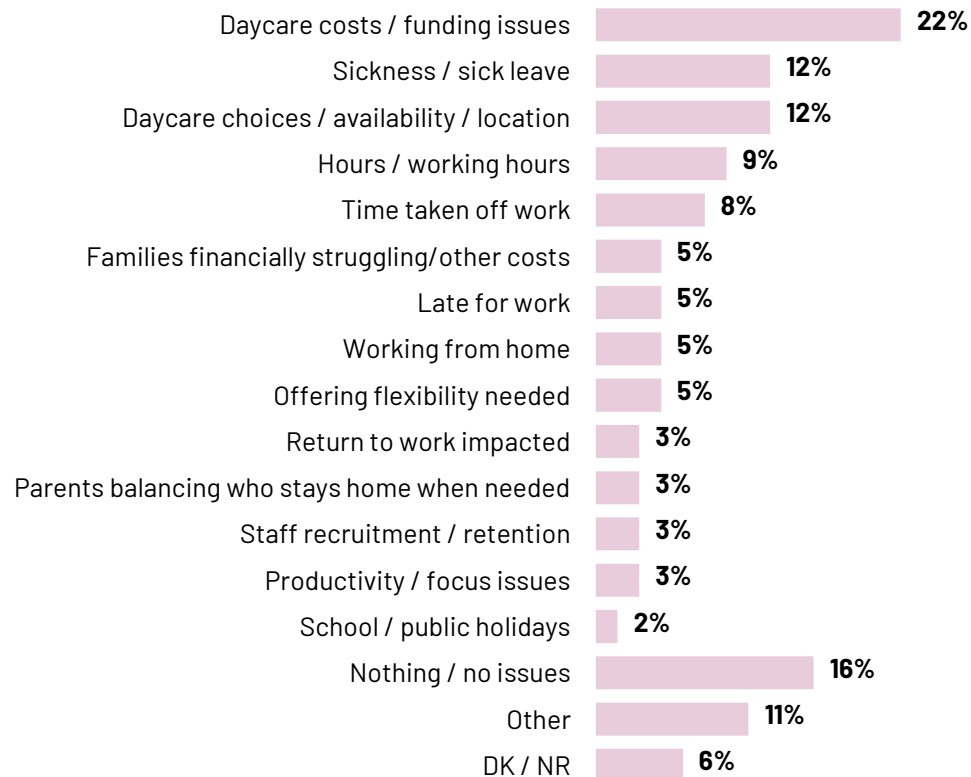
QECEB: Below are some statements about the challenges some businesses and organisations may experience relating to their employees with ECE-aged children within the current ECE system. How much do you agree or disagree with the following?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Challenges facing businesses within the ECE system

Employers described a range of challenges faced by their organisation related to ECE, with cost-related issues being most strongly featured. Other challenges related to balancing hours at work and care for their children.

Other challenges relating to employees with ECE-aged children (open-ended response) - coded



Government funding doesn't go far enough. Kindys don't operate work friendly hours. Choices are limited for high quality care due to funding, cost, location and timing.

They cannot afford to send their kids everyday of the week, so need to work from home at least one day.

Cost and sick leave predominantly. Most families need both parents to work so it's a juggle to arrange finances, schedules, leave balances etc.

Tend to want part time hours which can be limiting in staffing a programme.



QECE9: What other challenges has your business / organisation faced relating to employees with ECE-aged children within the current ECE system? Please explain in as much detail as you like.

Base: Verbatim responses to QECE9 (n=64). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Challenges facing businesses within the ECE system

Other challenges	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours			
	Total	20-49**	50-99**	100+**	NET Upper NI**	NET Lower NI**	NET South Island**	NET Up to 25%**	NET 26-50%**	NET 51-75%**	NET 76-100%**	NET 0%**	NET Up to 25%**	NET 30-50%**	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes**	No**
Total	64*	19**	15**	30**	35**	17**	12**	12**	25**	18**	9**	0**	28**	24**	6**	2**	4**	46**	18
Daycare costs / funding issues	22%	5%	33%	27%	20%	29%	17%	8%	28%	22%	22%	-	18%	21%	33%	50%	25%	20%	28%
Sickness / sick leave	12%	16%	20%	7%	9%	12%	25%	0%	8%	22%	22%	-	14%	17%	0%	0%	0%	9%	22%
Daycare choices / availability / location	12%	11%	27%	7%	11%	18%	8%	8%	8%	22%	11%	-	11%	12%	33%	0%	0%	13%	11%
Hours / working hours	9%	16%	7%	7%	11%	6%	8%	0%	8%	6%	33%	-	7%	12%	0%	50%	0%	9%	11%
Time taken off work	8%	5%	7%	10%	9%	6%	8%	0%	12%	6%	11%	-	7%	8%	0%	0%	25%	9%	6%
Families financially struggling / other costs	5%	5%	7%	3%	6%	6%	0%	8%	0%	6%	11%	-	4%	4%	0%	50%	0%	2%	11%
Late for work	5%	5%	7%	3%	3%	6%	8%	8%	4%	6%	0%	-	4%	8%	0%	0%	0%	7%	0%
Working from home	5%	0%	0%	10%	6%	0%	8%	0%	12%	0%	0%	-	7%	0%	17%	0%	0%	4%	6%
Offering flexibility needed	5%	0%	7%	7%	6%	6%	0%	0%	0%	17%	0%	-	4%	8%	0%	0%	0%	4%	6%
Return to work impacted	3%	5%	0%	3%	6%	0%	0%	0%	0%	6%	11%	-	4%	4%	0%	0%	0%	2%	6%
Parents balancing who stays home when needed	3%	0%	7%	3%	0%	6%	8%	0%	4%	6%	0%	-	0%	8%	0%	0%	0%	2%	6%
Staff recruitment / retention	3%	5%	0%	3%	3%	0%	8%	8%	0%	6%	0%	-	0%	8%	0%	0%	0%	2%	6%
Productivity / focus issues	3%	0%	7%	3%	6%	0%	0%	8%	0%	6%	0%	-	7%	0%	0%	0%	0%	0%	11%
School / public holidays	2%	0%	0%	3%	3%	0%	0%	0%	0%	0%	11%	-	0%	0%	0%	50%	0%	2%	0%
Nothing / no issues	16%	21%	13%	13%	11%	24%	17%	42%	16%	6%	0%	-	14%	17%	17%	0%	25%	15%	17%
Other	11%	16%	7%	10%	9%	18%	8%	8%	12%	6%	22%	-	21%	4%	0%	0%	0%	13%	6%
DK / NR	6%	11%	0%	7%	6%	12%	0%	8%	8%	6%	0%	-	11%	0%	0%	0%	25%	9%	0%

QECE9: What other challenges has your business / organisation faced relating to employees with ECE-aged children within the current ECE system? Please explain in as much detail as you like.

Base: Verbatim responses to QECE9 (n=64). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

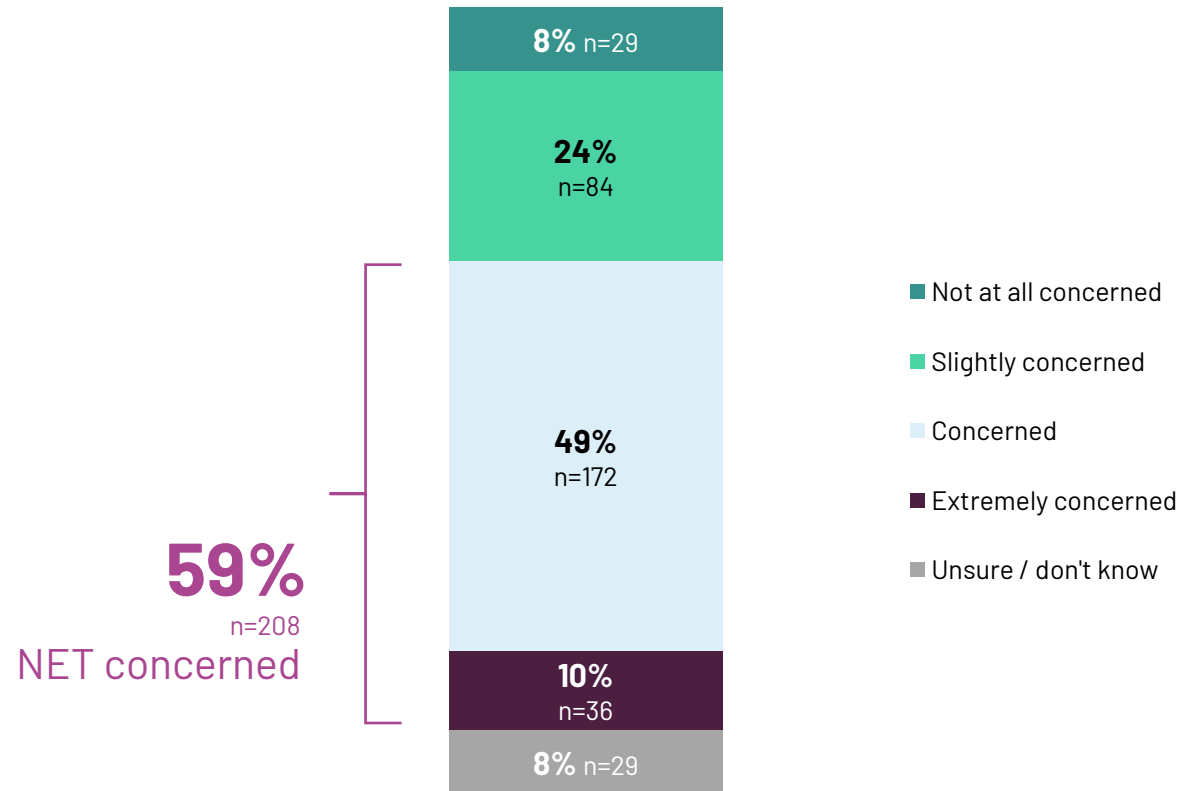
06

COSTS INCURRED FOR BUSINESSES / ORGANISATIONS

Concern about impact of increased ECE costs

Employers are more likely to be concerned overall (59%) than unconcerned (8%) about the impact of increased ECE costs on their business.

Level of concern about impact of increased ECE costs



QECE10: If the costs for ECE were to increase for families, how concerned would you be on the impact of this on your business / organisation?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Concern about impact of increased ECE costs

Businesses / organisations with a higher proportion of female employees (51-75% female) are more likely to be concerned about the impact of rising ECE costs (35%).

Concern about the impact of rising ECE costs	Total	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
		20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Not at all concerned	8%	11%	7%	7%	7%	11%	9%	8%	10%	5%	11%	17%	8%	8%	8%	23%	5%	10%	6%
Slightly concerned	24%	27%	22%	23%	23%	23%	28%	25%	23%	27%	18%	33%	25%	21%	26%	23%	32%	25%	22%
Concerned	49%	46%	56%	48%	53%	43%	45%	53%	47%	52%	45%	17%	53%	49%	36%	46%	53%	49%	49%
Extremely concerned	10%	7%	7%	14%	11%	12%	6%	9%	10%	9%	16%	17%	7%	13%	18%	8%	5%	9%	12%
Unsure / don't know	8%	10%	7%	8%	7%	10%	11%	6%	10%	7%	11%	17%	7%	9%	13%	0%	5%	7%	11%
NET concerned	59%	52%	63%	62%	59%	63%	56%	52%	59%	62%	57%	61%	61%	59%	33%	60%	62%	54%	54%

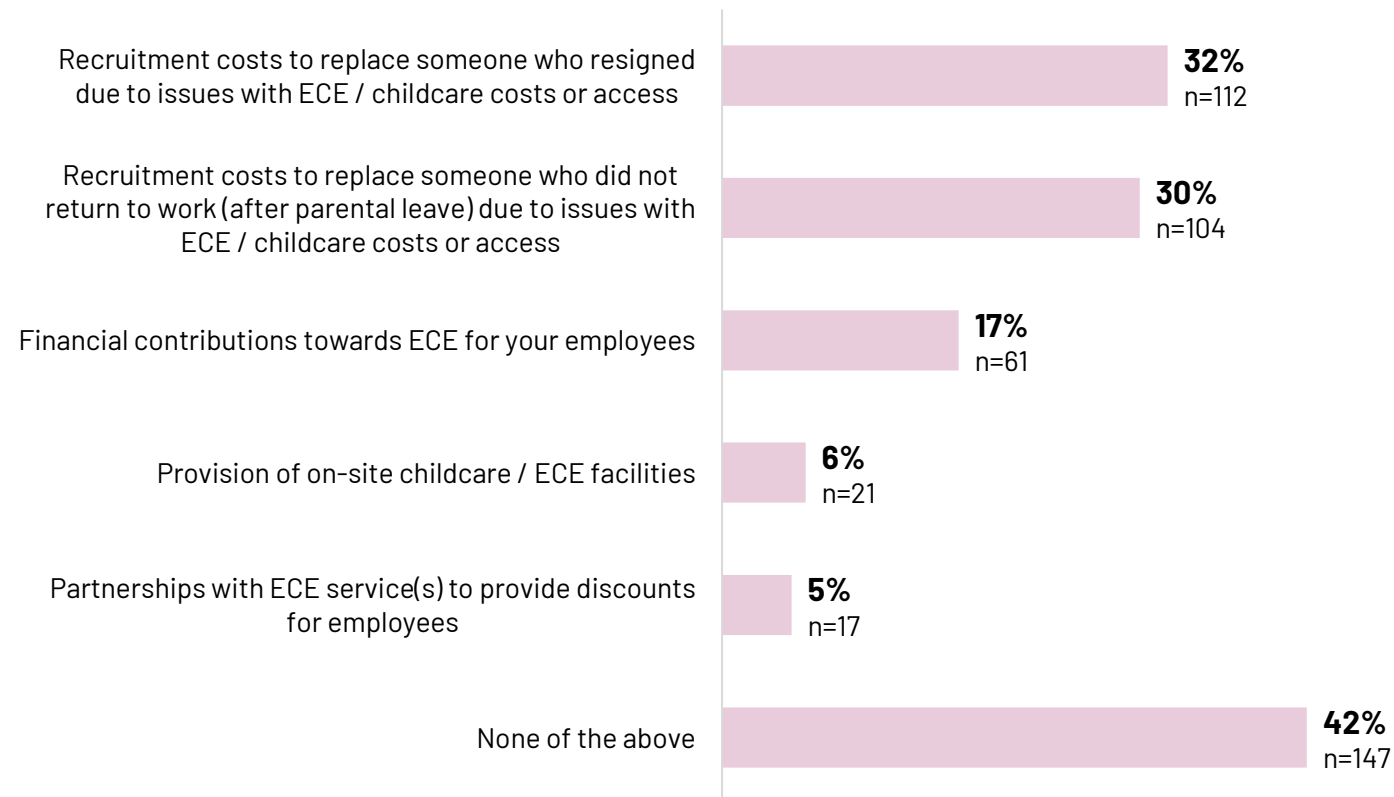
QECE10: If the costs for ECE were to increase for families, how concerned would you be on the impact of this on your business / organisation?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Costs incurred by business / organisation in the past 12 months

Just under a third of respondents have faced recruitment costs to replace employees because of their issues accessing ECE. Their employees resigned due to issues with access (32%), or could not return to work after parental leave for access reasons (30%).

Costs incurred in past 12 months



QECE11: Which of the following costs, if any, has your business / organisation incurred in the past 12 months?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Costs incurred by business / organisation in past 12 months

Larger businesses / organisations are more likely to have incurred recruitment costs to replace employees that did not return from parental leave due to ECE costs or access (36%).

Costs incurred in past 12 months	Number of employees				Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
	Total	20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know*	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Recruitment costs to replace someone who resigned due to issues with ECE / childcare costs or access	32%	29%	32%	34%	32%	38%	23%	36%	33%	29%	29%	17%	34%	26%	49% ▲	23%	26%	35%	28%
Recruitment costs to replace someone who did not return to work (after parental leave) due to issues with ECE / childcare costs or access	30%	22%	27%	36%	31%	32%	23%	28%	27%	33%	37%	17%	28%	29%	41%	31%	32%	28%	32%
Financial contributions towards ECE for your employees	17%	19%	17%	17%	20%	12%	14%	21%	20%	14%	8%	17%	19%	23%	10%	0%	5%	19%	15%
Provision of on-site childcare / ECE facilities	6%	4%	10%	5%	6%	10%	0%	8%	7%	4%	5%	0%	5%	8%	5%	15%	5%	7%	4%
Partnerships with ECE service(s) to provide discounts for employees	5%	7%	5%	4%	6%	2%	5%	8%	4%	7%	0%	17%	5%	7%	3%	0%	0%	5%	5%
None of the above	42%	50%	43%	37%	38%	44%	52%	42%	41%	42%	47%	67%	44%	33%	33%	69%	63%	40%	45%

QECE11: Which of the following costs, if any, has your business / organisation incurred in the past 12 months?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

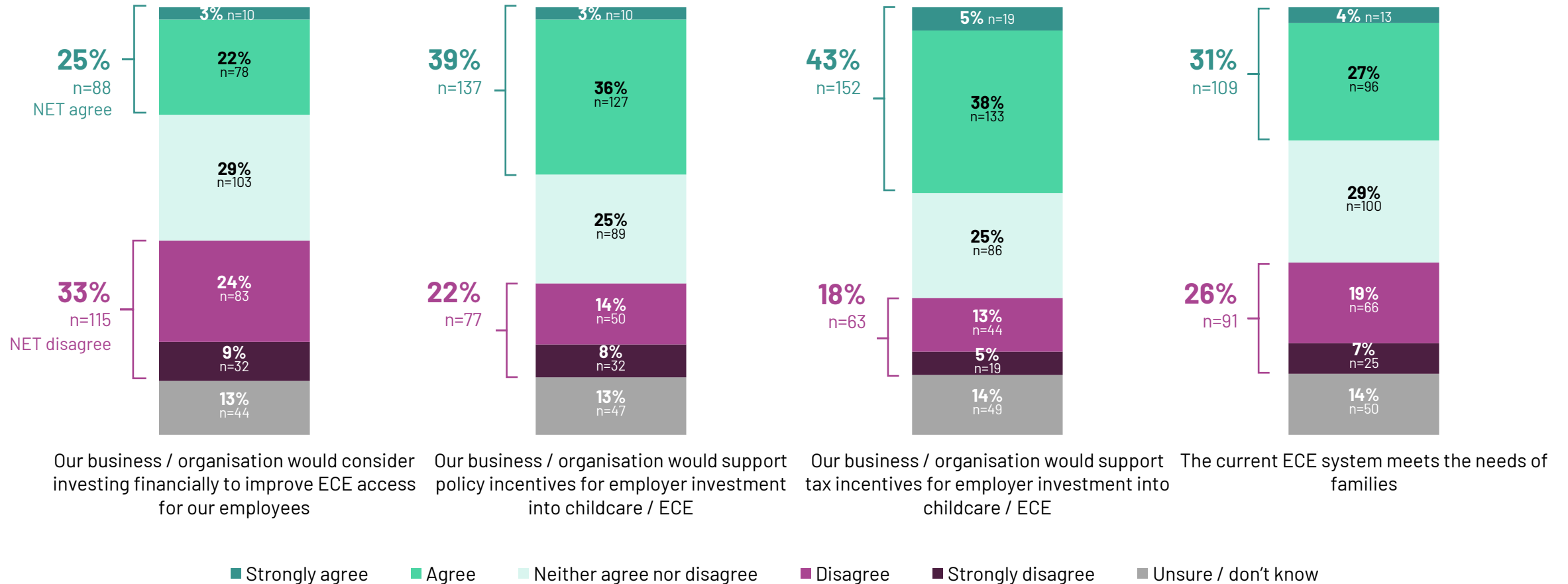
Red / green indicates significantly lower / higher than Total

07

OPINIONS ON ECE POLICIES

Opinions towards ECE policies and whether they meet needs

While over 4 in 10 (43%) would support tax incentives for investing in ECE, only a quarter (25%) would consider investing financially.

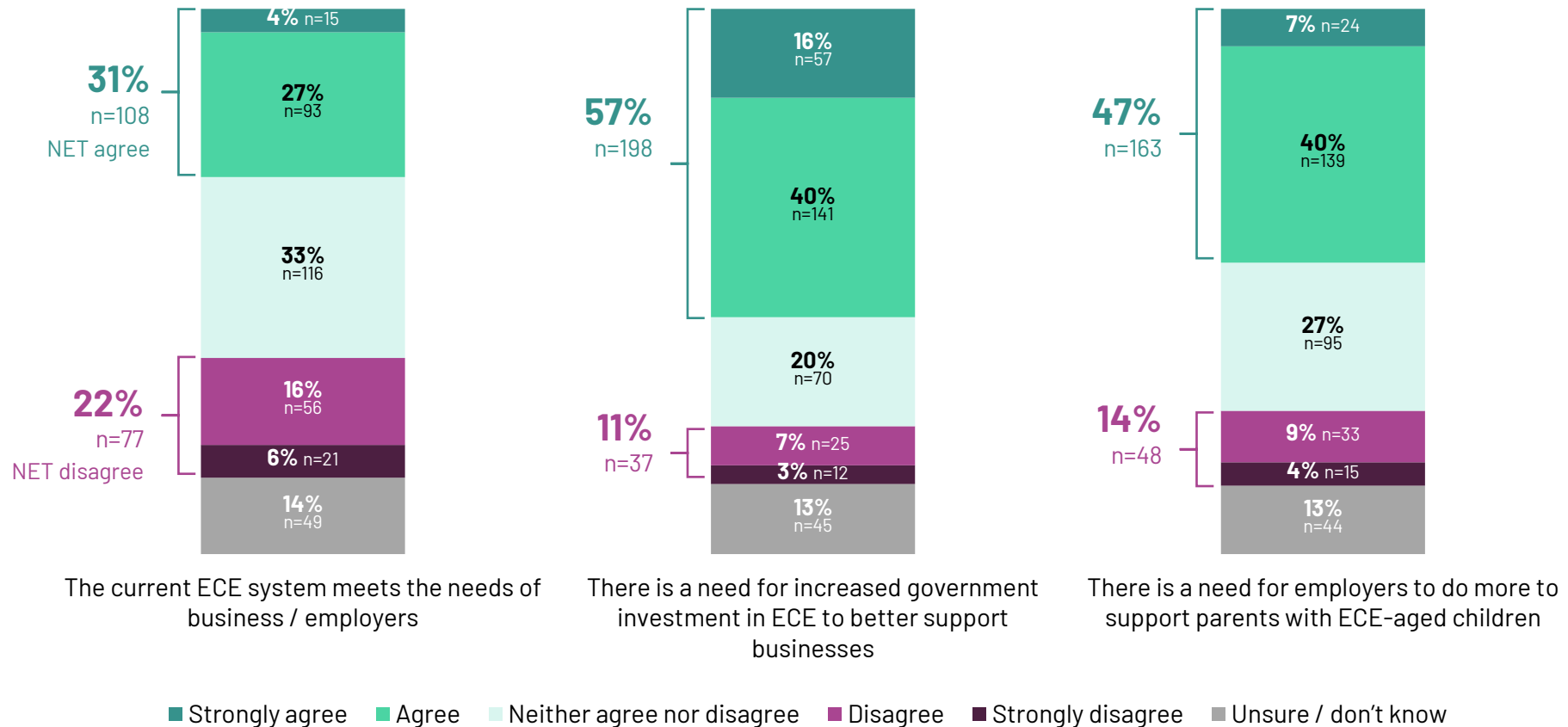


QECE12: In your capacity as an employer or a business / organisation representative, how much do you agree or disagree with the following statements?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Opinions towards ECE policies and whether they meet needs

31% agree that the current ECE system meets the needs of families and business/employers, more than half (57%) agree that there is a need for increased government investment in ECE.



QECE12: In your capacity as an employer or a business / organisation representative, how much do you agree or disagree with the following statements?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Consideration of financial investment in ECE

25% have considered investing financially to improve ECE access, and businesses/organisations with a lower proportion of parents / primary caregivers (up to 25%) are more likely to have considered this.

Consider investing financially to improve ECE access	Total	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
		20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Strongly agree	3%	4%	4%	2%	4%	2%	0%	8%	3%	1%	0%	17%	2%	4%	0%	0%	5%	3%	3%
Agree	22%	15%	24%	26%	21%	26%	20%	17%	28%	18%	13%	0%	28%	16%	26%	15%	16%	21%	24%
Neither agree nor disagree	29%	37%	24%	28%	31%	23%	31%	34%	31%	26%	26%	50%	29%	32%	28%	31%	11%	30%	29%
Disagree	24%	22%	33%	20%	23%	23%	25%	26%	17%	30%	32%	17%	27%	21%	18%	31%	21%	23%	25%
Strongly disagree	9%	12%	9%	8%	7%	10%	16%	11%	8%	7%	16%	17%	6%	13%	8%	8%	16%	9%	9%
Unsure / don't know	13%	11%	6%	17%	13%	15%	8%	4%	13%	17%	13%	0%	8%	14%	21%	15%	32%	14%	11%
NET Agree	25%	19%	28%	28%	25%	28%	20%	25%	31%	20%	13%	17%	30%	20%	26%	15%	21%	24%	26%
NET Disagree	33%	34%	41%	28%	30%	33%	41%	38%	26%	37%	47%	33%	33%	34%	26%	38%	37%	32%	34%

QECE12: In your capacity as an employer or a business / organisation representative, how much do you agree or disagree with the following statements?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Support for policy incentives for employer investment in ECE

39% support policy incentives for employer investment in ECE. Businesses/organisations with the lowest proportion of female employees are significantly less likely to support such incentives.

Support policy incentives for employer investment into childcare/ ECE	Total	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
		20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Strongly agree	3%	3%	2%	3%	3%	4%	2%	2%	3%	3%	3%	0%	4%	2%	0%	0%	5%	2%	4%
Agree	36%	37%	46%	31%	37%	37%	33%	42%	37%	35%	29%	17%	40%	40%	23%	23%	26%	35%	39%
Neither agree nor disagree	25%	28%	23%	25%	26%	25%	25%	23%	25%	26%	29%	33%	25%	22%	38%	54%	5%	26%	25%
Disagree	14%	13%	11%	17%	16%	10%	16%	8%	16%	14%	16%	17%	15%	14%	8%	0%	32%	15%	13%
Strongly disagree	8%	7%	9%	8%	6%	10%	9%	19% ▲	6%	4%	8%	33%	5%	8%	13%	15%	5%	9%	6%
Unsure / don't know	13%	13%	9%	16%	12%	15%	16%	8%	13%	17%	16%	0%	11%	15%	18%	8%	26%	14%	12%
NET Agree	39%	40%	49%	34%	40%	41%	34%	43%	40%	38%	32%	17%	44%	42%	23%	23%	32%	36%	43%
NET Disagree	22%	20%	20%	25%	22%	20%	25%	26%	22%	18%	24%	50%	20%	22%	21%	15%	37%	24%	19%

Red / green indicates significantly lower / higher than Total

QECE12: In your capacity as an employer or a business / organisation representative, how much do you agree or disagree with the following statements?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Support for tax incentives for employer investment in ECE

43% support tax incentives for employer investment in ECE, with mid-sized businesses/organisations (50–99 employees) more likely to support these incentives.

Support tax incentives for employer investment into childcare/ ECE	Total	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
		20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Strongly agree	5%	6%	6%	5%	6%	2%	8%	4%	5%	5%	8%	0%	8%	1%	8%	0%	5%	5%	7%
Agree	38%	42%	43%	34%	37%	44%	34%	42%	39%	35%	37%	67%	37%	43%	31%	46%	21%	37%	40%
Neither agree nor disagree	25%	23%	24%	26%	27%	21%	20%	30%	24%	25%	18%	17%	28%	20%	36%	15%	11%	24%	25%
Disagree	13%	9%	16%	13%	12%	7%	20%	11%	12%	13%	16%	17%	14%	11%	5%	0%	26%	13%	12%
Strongly disagree	5%	6%	6%	5%	4%	6%	8%	6%	6%	4%	5%	0%	2%	10%	3%	15%	5%	6%	5%
Unsure / don't know	14%	15%	5% ▼	18%	14%	19%	9%	8%	14%	17%	16%	0%	11%	14%	18%	23%	32%	16%	11%
NET Agree	43%	48%	49%	38%	42%	47%	42%	45%	44%	40%	45%	67%	45%	44%	38%	46%	26%	42%	46%
NET Disagree	18%	15%	22%	18%	17%	14%	28%	17%	18%	17%	21%	17%	17%	22%	8%	15%	32%	18%	18%

Red / green indicates significantly lower / higher than Total

QECE12: In your capacity as an employer or a business / organisation representative, how much do you agree or disagree with the following statements?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Opinion on whether current ECE system meets the needs of families

31% agree that the ECE system meets the needs of families. However, businesses/organisations with a higher proportion (30–75%) of parents/primary caregivers are less likely to agree (25%; 26%).

Current ECE system meets the needs of families	Number of employees				Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
	Total	20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Strongly agree	4%	6%	6%	1%	2%	7%	3%	6%	3%	4%	3%	0%	4%	7%	0%	0%	0%	4%	4%
Agree	27%	23%	29%	29%	29%	26%	23%	23%	30%	24%	32%	17%	35%	19%	26%	23%	16%	24%	32%
Neither agree nor disagree	29%	29%	34%	26%	28%	26%	34%	28%	28%	35%	18%	33%	26%	31%	36%	23%	21%	30%	26%
Disagree	19%	14%	18%	22%	20%	20%	12%	15%	17%	24%	18%	17%	17%	20%	15%	23%	32%	19%	18%
Strongly disagree	7%	9%	5%	7%	5%	14%	6%	11%	6%	4%	13%	17%	4%	9%	10%	15%	5%	7%	7%
Unsure / don't know	14%	20%	7%	14%	15%	7%	20%	17%	16%	9%	16%	17%	13%	14%	13%	15%	26%	15%	13%
NET Agree	31%	29%	35%	31%	32%	33%	27%	28%	33%	28%	34%	17%	39%	25%	26%	23%	16%	28%	36%
NET Disagree	26%	23%	23%	29%	25%	33%	19%	26%	23%	28%	32%	33%	22%	29%	26%	38%	37%	27%	25%

QECE12: In your capacity as an employer or a business / organisation representative, how much do you agree or disagree with the following statements?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Opinion on whether the current ECE system meets the needs of businesses / employers

31% agree that the ECE system meets the needs of employers, with larger organisations (100+ employees) more likely to disagree.

Current ECE system meets the needs of business/ employers	Number of employees				Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
	Total	20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Strongly agree	4%	2%	9%	4%	4%	5%	3%	4%	5%	4%	0%	0%	5%	6%	0%	0%	0%	4%	5%
Agree	27%	27%	26%	27%	30%	22%	20%	25%	29%	20%	34%	17%	30%	25%	33%	15%	0%	27%	26%
Neither agree nor disagree	33%	39%	37%	28%	32%	33%	38%	30%	32%	40%	24%	67%	31%	35%	28%	31%	42%	34%	32%
Disagree	16%	9%	17%	20%	15%	19%	16%	15%	13%	22%	18%	0%	16%	14%	13%	38%	26%	16%	15%
Strongly disagree	6%	7%	4%	7%	5%	11%	3%	13%	5%	3%	8%	17%	5%	6%	13%	0%	0%	6%	7%
Unsure / don't know	14%	17%	9%	15%	14%	10%	20%	13%	16%	11%	16%	0%	13%	14%	13%	15%	32%	14%	15%
NET Agree	31%	29%	34%	31%	35%	27%	23%	28%	35%	24%	34%	17%	35%	31%	33%	15%	0%	31%	31%
NET Disagree	22%	16%	21%	26%	20%	30%	19%	28%	17%	25%	26%	17%	21%	20%	26%	38%	26%	22%	22%

QECE12: In your capacity as an employer or a business / organisation representative, how much do you agree or disagree with the following statements?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Perceived need to increase government investment in ECE

57% agree that the government needs to increase its investment in ECE, with businesses/organisations based in the lower North Island more likely to agree.

Need for increased government investment in ECE	Number of employees				Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
	Total	20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Strongly agree	16%	16%	15%	17%	15%	26%	8%	13%	16%	15%	24%	50%	14%	15%	23%	23%	16%	15%	18%
Agree	40%	45%	40%	38%	38%	42%	47%	49%	36%	45%	37%	0%	44%	38%	36%	46%	37%	42%	38%
Neither agree nor disagree	20%	15%	22%	22%	23%	17%	12%	11%	26%	15%	16%	50%	17%	25%	18%	15%	11%	20%	21%
Disagree	7%	8%	7%	7%	8%	4%	9%	8%	7%	8%	8%	0%	8%	8%	5%	0%	11%	7%	8%
Strongly disagree	3%	2%	7%	2%	2%	5%	6%	6%	3%	3%	3%	0%	5%	1%	5%	0%	0%	3%	4%
Unsure / don't know	13%	15%	9%	14%	14%	6%	17%	13%	12%	14%	13%	0%	11%	13%	13%	15%	26%	13%	12%
NET Agree	57%	60%	55%	55%	53%	68%	55%	62%	52%	60%	61%	50%	58%	53%	59%	69%	53%	57%	55%
NET Disagree	11%	10%	15%	9%	10%	9%	16%	13%	10%	11%	11%	0%	13%	8%	10%	0%	11%	10%	12%

QECE12: In your capacity as an employer or a business / organisation representative, how much do you agree or disagree with the following statements?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100), **Very low base size (<50), indicative result only.

Perceived need for employers to do more to support parents with ECE-aged children

47% believe employers should do more to support parents with young children, and businesses/organisations in the lower North Island are significantly more likely to hold this view.

Need for employers to do more to support parents with ECE-aged children	Number of employees				Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
	Total	20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%*	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Strongly agree	7%	7%	6%	7%	5%	14%	5%	8%	4%	8%	16%	33%	4%	11%	8%	0%	5%	6%	9%
Agree	40%	38%	45%	38%	38%	48%	34%	34%	38%	45%	42%	0%	46%	35%	28%	69%	26%	39%	40%
Neither agree nor disagree	27%	28%	28%	26%	28%	22%	31%	30%	32%	22%	16%	67%	24%	31%	36%	15%	11%	26%	29%
Disagree	9%	6%	10%	11%	11%	6%	9%	15%	8%	9%	11%	0%	10%	6%	10%	8%	26%	11%	7%
Strongly disagree	4%	6%	5%	3%	3%	4%	8%	4%	4%	4%	5%	0%	5%	4%	5%	0%	5%	6%	2%
Unsure / don't know	13%	16%	6%	14%	15%	6%	12%	9%	14%	13%	11%	0%	11%	13%	13%	8%	26%	12%	13%
NET Agree	47%	45%	51%	46%	43%	62% ▲	39%	42%	43%	52%	58%	33%	50%	46%	36%	69%	32%	45%	49%
NET Disagree	14%	12%	15%	14%	14%	10%	17%	19%	12%	13%	16%	0%	15%	9%	15%	8%	32%	17%	9%

Red / green indicates significantly lower / higher than Total

QECE12: In your capacity as an employer or a business / organisation representative, how much do you agree or disagree with the following statements?

Base: All survey respondents (n=350), **Caution:** *Low base size (<100), **Very low base size (<50), indicative result only.

Reasons the current ECE system is not meeting the needs of families

Most respondents who believe the ECE system is not meeting families' needs attribute this to cost, or that operating hours are prohibitive for working parents.

Reasons current ECE system does not meet needs of families

Costs / too expensive	42%	n=38
Hours / flexible hours	24%	n=22
Impacts parents time off work / working hours	11%	n=10
Accessibility / availability in general	8%	n=7
Waiting list / capacity issues	7%	n=6
Financial support needed	5%	n=5
Need more funding / resources	5%	n=5
Changes are needed	5%	n=5
Parents returning to work vs staying home	4%	n=4
Lack of support / help in general	3%	n=3
Quality of education / care issues	3%	n=3
Child / teacher ratios	2%	n=2
Flexibility issues in general	2%	n=2
No reason	1%	n=1
Other	11%	n=10
DK / NR / NA	4%	n=4



It is exorbitantly expensive for 1 child, let alone 2 or more children at the same time. It quickly becomes close to another mortgage or rent payment.

It can work out cheaper to not go back to work as there is no benefit to the family for mum to go back to work. It's usually the women who are affected by this, they are usually the primary caregiver and lose a lot when it's not economically viable to be working due to childcare costs.

The times services are available are not always suitable, long waiting lists are a problem and the costs are too high for some families

It depends on their job and occupation and the hours they work. it doesn't work for part time parents as there are no real cheaper and flexible hours to drop off and pick ups or half day schedules and a lesser price range.

QECE13: You indicated that the current ECE system does not meet the needs of families. What makes you say this? Please explain in as much detail as you like.

Base: Survey respondents that indicated that the current ECE system doesn't meet the needs of families (n=91)

Caution: *Low base size (<100). **Very low base size (<50), indicative result only.

Reasons the current ECE system does not meet the needs of families	Total*	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
		20-49**	50-99**	100+**	NET Upper NI*	NET Lower NI**	NET South Island**	NET Up to 25%**	NET 26-50%**	NET 51-75%**	NET 76-100%**	NET 0%**	NET Up to 25%**	NET 30-50%**	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes*	No**
Total	91*	23**	19**	49**	52*	27**	12**	14**	39**	26**	12**	2**	36**	31**	10**	5**	7**	57*	34**
Costs / too expensive	42%	39%	47%	41%	35%	56%	42%	43%	31%	50%	58%	50%	39%	45%	40%	60%	29%	37%	50%
Hours / flexible hours	24%	13%	37%	24%	21%	37%	8%	14%	23%	35%	17%	50%	25%	16%	30%	60%	14%	25%	24%
Impacts parents time off work / working hours	11%	9%	11%	12%	8%	15%	17%	14%	10%	15%	0%	0%	11%	10%	30%	0%	0%	14%	6%
Accessibility / availability in general	8%	4%	11%	8%	4%	15%	8%	7%	8%	8%	8%	0%	8%	6%	0%	20%	14%	12%	0%
Waiting list / capacity issues	7%	4%	5%	8%	2%	19%	0%	0%	10%	8%	0%	0%	6%	3%	20%	0%	14%	7%	6%
Financial support needed	5%	4%	5%	6%	4%	11%	0%	14%	3%	8%	0%	0%	6%	10%	0%	0%	0%	2%	12%
Need more funding / resources	5%	4%	5%	6%	8%	4%	0%	14%	3%	4%	8%	50%	6%	3%	0%	0%	14%	9%	0%
Changes are needed	5%	17%	5%	0%	4%	4%	17%	7%	8%	4%	0%	0%	6%	6%	0%	0%	14%	7%	3%
Parents returning to work vs staying home	4%	9%	5%	2%	2%	11%	0%	0%	5%	4%	8%	0%	6%	3%	0%	0%	14%	4%	6%
Lack of support / help in general	3%	0%	5%	4%	4%	0%	8%	7%	3%	4%	0%	0%	3%	6%	0%	0%	0%	4%	3%
Quality of education / care issues	3%	4%	0%	4%	4%	4%	0%	0%	5%	0%	8%	0%	6%	3%	0%	0%	0%	2%	6%
Child / teacher ratios	2%	4%	0%	2%	2%	4%	0%	0%	3%	0%	8%	0%	3%	3%	0%	0%	0%	2%	3%
Flexibility issues in general	2%	4%	0%	2%	2%	0%	8%	0%	3%	0%	8%	0%	0%	3%	10%	0%	0%	4%	0%
No reason	1%	0%	0%	2%	2%	0%	0%	0%	0%	4%	0%	0%	3%	0%	0%	0%	0%	0%	3%
Other	11%	13%	16%	8%	15%	4%	8%	0%	18%	8%	8%	0%	6%	13%	30%	20%	0%	7%	18%
DK / NR / NA	4%	4%	0%	6%	6%	4%	0%	7%	5%	4%	0%	0%	11%	0%	0%	0%	0%	0%	12%

QECE13: You indicated that the current ECE system does not meet the needs of families. What makes you say this? Please explain in as much detail as you like.

Base: Survey respondents that indicated that the current ECE system doesn't meet the needs of families (n=91)

Caution: *Low base size (<100). **Very low base size (<50), indicative result only.

Reasons the current ECE system is not meeting the needs of businesses

Of those that said the ECE system is not meeting the needs of businesses, just over 1 in 5 (22%) attribute this to operating hours. Just under 1 in 5 (19%) cited childcare costs.

Reasons current ECE system does not meet needs of businesses / employers (open-ended response) - coded

Operating hours of ECE services	22%	n=17
Costs / barrier to parents, employees returning to work	19%	n=15
Accessibility / availability / flexibility in general	8%	n=6
Need more funding in general	8%	n=6
Issue with support in general	5%	n=4
Waiting lists / not enough centres	5%	n=4
Disadvantages employers in general	5%	n=4
Impacts parents working hours	5%	n=4
Financial support / subsidies / financial incentives needed	4%	n=3
Issue with quality of care / education	3%	n=2
Need to work together / support each other	3%	n=2
Staff retention	3%	n=2
Hard / difficult for parents in general	3%	n=2
No reason	1%	n=1
Other	16%	n=12
DK / NR / NA	6%	n=5



There is too much operational impact on the business in trying to support working parents.

Inflexibility around pickup times are challenging when there is ad hoc work that comes up.

Because mums are such amazing workers – organisation skills, communication, loyalty – and they appreciate continuing with their career while balancing being a parent. So if Mum can't return to work due to childcare costs, everyone loses out but especially the primary carer which is usually a woman.

Good staff are unable to return to work when they wanted to because there are no spaces in ECE.

They have very strict rules about child illness that mean staff are absent a lot.



QECE14: You indicated that the current ECE system does not meet the needs of businesses / employers. What makes you say this? Please explain in as much detail as you like.

Base: Survey respondents that indicated that the current ECE system does not meet the needs of businesses / employers (n=77)

Caution: *Low base size (<100). **Very low base size (<50), indicative result only.

Reasons current ECE system does not meet the needs of businesses/ employers	Number of employees				Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
	Total*	20-49**	50-99**	100+**	NET Upper NI**	NET Lower NI**	NET South Island**	NET Up to 25%**	NET 26-50%**	NET 51-75%**	NET 76-100%**	NET 0%**	NET Up to 25%**	NET 30-50%**	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes**	No**
Total	77*	16**	17**	44**	41**	24**	12**	15**	29**	23**	10**	1**	35**	21**	10**	5**	5**	47**	30**
Operating hours of ECE services	22%	19%	18%	25%	22%	29%	8%	20%	24%	22%	20%	100%	20%	19%	30%	20%	20%	23%	20%
Costs/barrier to parents, employees returning to work	19%	19%	35%	14%	17%	25%	17%	20%	14%	22%	30%	0%	11%	19%	20%	40%	60%	13%	30%
Accessibility/ availability/ flexibility in general	8%	6%	0%	11%	7%	8%	8%	0%	10%	4%	20%	0%	6%	10%	10%	20%	0%	9%	7%
Need more funding in general	8%	6%	6%	9%	7%	8%	8%	0%	7%	13%	10%	0%	3%	10%	10%	20%	20%	11%	3%
Issue with support in general	5%	0%	6%	7%	7%	0%	8%	7%	7%	4%	0%	0%	3%	5%	10%	0%	20%	6%	3%
Waiting lists/not enough centres	5%	0%	6%	7%	2%	12%	0%	7%	10%	0%	0%	0%	3%	0%	20%	0%	20%	6%	3%
Disadvantages employers in general	5%	6%	12%	2%	0%	8%	17%	7%	3%	9%	0%	0%	6%	5%	10%	0%	0%	6%	3%
Impacts parents working hours	5%	0%	6%	7%	7%	4%	0%	7%	3%	9%	0%	0%	9%	5%	0%	0%	0%	4%	7%
Financial support/ subsidies/ financial incentives needed	4%	12%	0%	2%	5%	0%	8%	7%	7%	0%	0%	0%	6%	5%	0%	0%	0%	0%	10%
Issue with quality of care/education	3%	6%	0%	2%	0%	8%	0%	0%	0%	4%	10%	0%	3%	5%	0%	0%	0%	2%	3%
Need to work together/ support each other	3%	0%	6%	2%	2%	4%	0%	0%	0%	9%	0%	0%	0%	5%	0%	20%	0%	2%	3%
Staff retention	3%	6%	0%	2%	2%	0%	8%	0%	3%	0%	10%	0%	3%	5%	0%	0%	0%	4%	0%
Hard/ difficult for parents in general	3%	0%	6%	2%	0%	0%	17%	0%	3%	4%	0%	0%	6%	0%	0%	0%	0%	4%	0%
No reason	1%	6%	0%	0%	2%	0%	0%	0%	3%	0%	0%	0%	3%	0%	0%	0%	0%	2%	0%
Other	16%	19%	12%	16%	27%	4%	0%	13%	24%	9%	10%	0%	20%	14%	10%	20%	0%	15%	17%
DK/NR/NA	6%	6%	0%	9%	10%	4%	0%	13%	3%	9%	0%	0%	6%	10%	0%	0%	20%	9%	3%

QECE14: You indicated that the current ECE system does not meet the needs of businesses / employers. What makes you say this? Please explain in as much detail as you like.

Base: Survey respondents that indicated that the current ECE system does not meet the needs of businesses / employers (n=77)

Caution: *Low base size (<100). **Very low base size (<50), indicative result only.

Ways employers can do more to support parents

Just under a quarter (23%) say that employers can support parents by offering more flexible hours, and 1 in 5 (20%) suggest more flexibility in general. 17% suggest financial support.

Ways employers can support parents with ECE-aged children

Hours / flexible hours	23%	n=38
Be flexible in general	20%	n=33
Offer financial support	17%	n=27
Work from home option	9%	n=15
Paid leave / sick day allowance	7%	n=11
Provide support / help in general	7%	n=11
On-site childcare / ECE service	6%	n=9
Understand parental responsibilities / challenges	5%	n=8
Work together with parents and ECE centres	3%	n=5
Availability / accessibility in general	2%	n=4
Offer options / opportunities in general	2%	n=3
It is needed	2%	n=3
Offer incentives	1%	n=2
Company policies are needed	1%	n=1
Employers are doing what they can	1%	n=1
Nothing	1%	n=2
Other	9%	n=14
DK / NR	12%	n=19

QECE15: You indicated that there is a need for employers to do more to support parents with ECE-aged children. What do you think employers can do to support parents with ECE-aged children?

Please explain in as much detail as you like.

Base: Survey respondents that indicated that there is a need for employers to do more to support parents with ECE-aged children (n=163)

Caution: *Low base size (<100). **Very low base size (<50), indicative result only.



They need to start with empathising with the challenges and struggles of young families.

Explore partnerships with ECE providers to provide discounts to parents, making it easier for them to keep work commitments without it becoming a company responsibility to take care of ECE-aged children.

Increase sick days. With both parents working and young children getting sick and needing care, the number of sick days a parent gets is not enough. The ability to WFH and properly care for a child is hard to manage.

Subsidies to support a return to work. More flexibility for working public holidays and on-site childcare.

Probably look at a percentage of their KiwiSaver including employer contribution to help with costs so not such a burden.



Ways employers can support parents with ECE-aged children	Number of employees				Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
	Total	20-49**	50-99**	100+*	NET Upper NI*	NET Lower NI*	NET South Island**	NET Up to 25%**	NET 26-50%*	NET 51-75%**	NET 76-100%**	NET 0%**	NET Up to 25%*	NET 30-50%**	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes*	No*
Total	163	45**	42**	76*	88*	50*	25**	22**	71*	48**	22**	2**	83*	49**	14**	9**	6**	96*	67*
Hours/flexible hours	23%	29%	24%	20%	26%	20%	20%	27%	15%	27%	36%	0%	28%	22%	7%	22%	17%	23%	24%
Be flexible in general	20%	16%	24%	21%	15%	24%	32%	9%	14%	31%	27%	50%	18%	18%	29%	33%	17%	19%	22%
Offer financial support	17%	16%	10%	21%	14%	24%	12%	5%	20%	21%	9%	0%	18%	14%	21%	11%	17%	16%	18%
Work from home option	9%	9%	17%	5%	12%	6%	4%	23%	4%	12%	5%	0%	13%	4%	7%	11%	0%	9%	9%
Paid leave/ sick day allowance	7%	16%	2%	4%	5%	8%	12%	0%	3%	10%	18%	0%	6%	12%	0%	0%	0%	4%	10%
Provide support/ help in general	7%	4%	7%	8%	6%	10%	4%	5%	11%	4%	0%	0%	7%	6%	7%	11%	0%	7%	6%
On-site childcare/ ECE service	6%	0%	2%	11%	3%	12%	0%	5%	6%	8%	0%	0%	5%	4%	14%	11%	0%	6%	4%
Understand parental responsibilities/ challenges	5%	4%	7%	4%	5%	4%	8%	9%	4%	6%	0%	0%	8%	2%	0%	0%	0%	5%	4%
Work together with parents and ECE centres	3%	4%	2%	3%	2%	2%	8%	9%	3%	0%	5%	0%	1%	4%	7%	0%	17%	3%	3%
Availability/ accessibility in general	2%	0%	2%	4%	3%	0%	4%	0%	4%	2%	0%	0%	2%	4%	0%	0%	0%	3%	1%
Offer options /opportunities in general	2%	2%	2%	1%	2%	2%	0%	0%	1%	4%	0%	0%	1%	0%	7%	0%	17%	0%	4%
It is needed	2%	0%	2%	3%	2%	2%	0%	5%	3%	0%	0%	0%	0%	4%	0%	0%	17%	3%	0%
Offer incentives	1%	2%	0%	1%	0%	2%	4%	5%	0%	0%	5%	0%	2%	0%	0%	0%	0%	1%	1%
Company policies are needed	1%	0%	0%	1%	1%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%
Employers are doing what they can	1%	0%	2%	0%	1%	0%	0%	0%	0%	0%	5%	0%	1%	0%	0%	0%	0%	0%	1%
Nothing	1%	2%	2%	0%	1%	0%	4%	5%	1%	0%	0%	0%	1%	2%	0%	0%	0%	1%	1%
Other	9%	4%	10%	11%	11%	6%	4%	18%	7%	6%	9%	0%	6%	4%	29%	22%	17%	12%	3%
DK/NR	12%	11%	12%	12%	12%	16%	0%	9%	15%	6%	14%	50%	10%	16%	7%	11%	0%	10%	13%

OCE15: You indicated that there is a need for employers to do more to support parents with ECE-aged children. What do you think employers can do to support parents with ECE-aged children? Please explain in as much detail as you like.
Base: Survey respondents that indicated that there is a need for employers to do more to support parents with ECE-aged children (n=163) **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only.

Government's number 1 priority for the ECE funding review

1 in 5 (21%) believe that the Government's top priority when reviewing ECE funding should be reducing the cost for parents. The most commonly stated priorities relate to cost (increased/better funding, financial support, funded hours).

Top priority for government's ECE funding review

Costs / cost to parents	21%	n=72
Increased / better funding that delivers better value for money to parents	11%	n=38
Support parents / financial support	9%	n=32
More funded hours	5%	n=17
Ease of use / make it simple	4%	n=14
Enable parents to work / get back in the workforce	4%	n=14
Applies to everyone / anyone	4%	n=13
More ECE centres / wait lists / capacity issues	3%	n=12
Quality teachers / competent / qualified	3%	n=12
Fairness	3%	n=12
Teacher salaries / remuneration / conditions	3%	n=11
Check the system is working / keep reviewing / get the facts	3%	n=10
Teacher ratios / more staff	3%	n=9
Accessibility / availability nfi	3%	n=9
Income / needs related	3%	n=9
Review is important / changes are needed	2%	n=8
Children / family	2%	n=7
Age relates / specific ages mentioned	2%	n=7
Negative review / funding in general	2%	n=7
Flexibility / flexible hours	2%	n=6
Other	6%	n=21
DK / NR / NA	24%	n=85



To provide free or cheaper childcare for parents. And it's about equality and getting women back into the workforce if this is what they wish. It is the women who suffer financially and career-wise due to childcare struggles.

The costs parents have to pay per hour, comparison with what a parent earns at a minimum wage – and that should give you the answer of what is wrong with the system.

Better audit and monitoring of the providers and the level and quality of service. Looking at helping alternative providers set up.

The welfare of the child – forcing parents back to work too early has a huge life-long detrimental impact on children.



QECE16: What do you think should be the number one priority for the government's ECE funding review? Please explain in as much detail as you like.

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only. **Note:** 0-1% responses not displayed in chart.

Government's number 1 priority for the ECE funding review

Businesses / organisations with 51-75% female employees are more likely to say *costs / costs to parents* should be the Government's number 1 priority, while those with a low proportion (<25%) are less likely to say *increased / better funding* should be a priority.

Top priority for government's ECE funding review	Total	Number of employees			Main region of operation			Proportion of female employees				Proportion of parents / primary caregivers					Operate in non-standard hours		
		20-49	50-99*	100+	NET Upper NI	NET Lower NI*	NET South Island*	NET Up to 25%**	NET 26-50%	NET 51-75%*	NET 76-100%**	NET 0%**	NET Up to 25%	NET 30-50%	NET 55-75%**	NET 80-100%**	Unsure / don't know**	Yes	No
Total	350	101	82*	167	205	81*	64*	53*	167	92*	38**	6**	167	106	39**	13**	19**	214	136
Costs/cost to parents	21%	22%	18%	21%	19%	23%	22%	23%	14%	33% ▲	18%	33%	20%	20%	18%	0%	47%	21%	20%
Increased/ better funding that delivers better value for money to parents	11%	13%	9%	11%	13%	7%	8%	2% ▼	13%	11%	16%	17%	10%	11%	10%	15%	11%	12%	10%
Support parents/ financial support	9%	8%	9%	10%	8%	11%	9%	9%	7%	12%	13%	0%	11%	9%	3%	15%	5%	7%	12%
More funded hours	5%	2%	7%	5%	5%	7%	2%	4%	4%	9%	0%	0%	5%	4%	5%	0%	11%	4%	7%
Ease of use/make it simple	4%	4%	6%	3%	3%	5%	6%	2%	7%	2%	0%	17%	2%	6%	5%	8%	5%	5%	3%
Enable parents to work/get back in the workforce	4%	4%	4%	4%	3%	5%	5%	2%	2%	7%	11%	0%	4%	5%	0%	0%	11%	4%	4%
Applies to everyone/anyone	4%	2%	6%	4%	3%	7%	2%	6%	3%	3%	5%	0%	5%	5%	0%	0%	0%	4%	3%
Other	6%	7%	7%	5%	5%	6%	8%	8%	7%	3%	5%	0%	7%	8%	5%	0%	0%	6%	6%
DK/NR /NA	24%	26%	26%	23%	26%	23%	19%	21%	30%	16%	24%	33%	21%	26%	26%	46%	21%	24%	24%

Red / green indicates significantly lower / higher than Total

QECE16: What do you think should be the number one priority for the government's ECE funding review? Please explain in as much detail as you like.

Base: All survey respondents (n=350). **Caution:** *Low base size (<100). **Very low base size (<50), indicative result only. **Note:** 0-3% responses not displayed in table.

THANK YOU

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