

# **Manitoba Child Care Association**

## **Parent Survey**

### **Final Report**

Prepared for the:

**Manitoba Child Care Association**

November 22, 2016



**RESEARCH INC.**

*...for what you need to know.*

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## ***APPENDICES (Provided separately):***

- Survey Instruments
- Detailed Tabular Results (including follow-up wait times survey)
- Respondent Verbatims

## EXECUTIVE SUMMARY

- Parents reported very high levels of satisfaction with both the hours and the child care services provided and with the overall quality of care their children receive.
- A significant majority of parents report waiting for child care. One-half of parents said they did not have a space when needed, and wait times for a licensed space for children currently in child care range between 14 and 20 months. Parents overwhelmingly point to wait times as the single worst thing about Manitoba's child care system.
- While waiting, parents typically turned to family and friends or used unlicensed child care as a stop-gap measure. Additionally, a significant proportion of parents report delaying a return to work or school or turning down employment or educational opportunities due to problems finding child care.
- A majority of parents (75%) prefer centre-based child care. A significant proportion of parents currently using home-based care also prefer centre-based care (42%).
- Among parents who have used unlicensed home-based child care in the last three years, most would prefer it to be licensed. Satisfaction levels with unlicensed home-based care are considerably lower than overall satisfaction rates. Overall, 92 per cent of parents surveyed said they are satisfied with their current child care facility or facilities. Among parents who have used unlicensed home-based care, 62 per cent said they were satisfied with the care their child received.
- When choosing child care, parents tended to consider "soft" factors such as the quality of educational programming and caring and well-trained staff to be the key elements they look for. Less important are more "hard" attributes such as cost, meals and the staff-to-child ratio.
- Parents living outside Winnipeg reported different experiences with child care than parents living in Winnipeg. Rural parents were more likely to have access to part-time care, less likely to report waiting for child care, more likely to serve on their centre's board but less likely to be very satisfied with their child care overall.
- Lower-income parents, those in households earning less than \$60,000 annually, also reported slightly different experiences with child care. Lower-income parents reported higher rates of delaying a return to work or school and turning down educational or employment opportunities. They were also more likely to agree child care fees are not affordable.
- Parents with multiple children, or with children in multiple types of child care, were also more likely to have experienced waits, more likely to have used unlicensed care, more likely to view child care costs as a burden and more likely to experience negative effects of child care on work or school opportunities.
- Parents placed a premium on licensed facilities and staff training and education.
- When thinking of possible policy changes to Manitoba's child care system, parents overwhelmingly favoured co-locating child care facilities with schools or building facilities as part of new housing developments. Parents also generally rejected altering ratio rules or increasing fees for wealthier parents. Nearly all parents surveyed also viewed a universal system as a priority for the provincial government.
- Parents serving on centre boards of directors generally felt boards offered good-quality oversight. However, a significant number expressed worry about their centre's finances.

## 1.0 BACKGROUND AND METHODOLOGY

In the spring of 2016, the Manitoba Child Care Association (MCCA) engaged Probe Research to create and conduct a four-phase quantitative research program involving parents, MCCA members, the general public and Manitoba business leaders. The goal of this research was to measure awareness of, and views on, key child care issues, satisfaction with the quality and availability of child care and views on possible policy options.

Specifically, this online survey of parents sought to determine parent satisfaction with child care, the prevalence of wait times, gaps in service, experience and satisfaction with unlicensed home-based care, key preferences and views on possible policy changes. The survey also sought to explore the experiences of parents serving on their child care centre's board of directors.

This research establishes benchmarks in public and stakeholder opinion in part to allow the MCCA to measure change over time. It also represents the most in-depth public opinion research undertaken in Manitoba in recent years on the issue of child care.

Key to this research is an online survey of Manitoba parents who use child care. This online survey was conducted between September 15<sup>th</sup> and Oct. 1<sup>st</sup>, 2016. Due to privacy concerns among MCCA members regarding the sharing of parent emails or telephone numbers, Probe Research and the MCCA relied on child care providers, including directors and family home operators, to disseminate the survey link to parents via email. That necessitated a universal and anonymous link instead of a link unique to each individual parent. The survey link was sent to parents using one or more of the MCCA's approximately 860 member child care centres and homes.

Nearly 3,100 parents completed this Probe Research online survey, representing approximately 4,774 children currently in child care. A detailed examination of demographic characteristics of these parents is available in Sec. 2.0.

In an effort to ensure as many parents as possible received the survey link via their child care provider, the MCCA, with the help of Probe Research, undertook a carefully-planned roll-out that included a series of pre-written notices and reminders for directors and home child care providers to send, in turn, to parents. In addition, Probe Research and the MCCA created a series of step-by-step instructions and timelines for directors to ensure the process was as easy-to-follow as possible and to encourage directors and home-based care providers to gather or update all parent emails prior to the survey launch. The table on the following page describes the roll-out.

ONLINE PARENT SURVEY	DATE
MCCA includes a one-page insert describing the parent survey in its quarterly magazine to members.	Late Aug. 2016
MCCA sends an announcement/instruction letter to directors/providers regarding the online survey.	Thursday, Sept. 1
MCCA sends survey link and announcement email to directors/providers for them to forward to parents.	Monday, Sept. 12
MCCA issues a press release describing the upcoming survey.	Monday, Sept. 12
Survey open for completion – MCCA sends a <b>go-time</b> email reminder to directors/providers to forward the link and announcement to parents.	9 am, Thursday, Sept. 15
MCCA sends reminder emails to directors/providers to forward a <b>first</b> reminder email to parents.	Wednesday, Sept. 21
MCCA sends reminder emails to directors/providers to forward a <b>second</b> reminder email to parents.	Wednesday, Sept. 28
Survey closes.	Saturday, Oct. 1

The instrument for the online survey was designed by Probe Research in close consultation with the MCCA. It was scripted into Probe Research's online software platform, *FluidSurveys*, and was pre-tested first via telephone with a small number of parents and then with approximately 20 parents who completed the online version. At the request of child care providers, paper survey was also distributed to parents who did not have regular access to a computer. Approximately 16 completed paper surveys were received from two child care centres in Winnipeg.

Data analysis was performed using SPSS, and no weighting of the data has been performed.

The survey took an average of 15 minutes to complete<sup>1</sup> and 84 percent of respondents who started the survey completed it within the data collection period.

During data analysis, the MCCA and Probe Research undertook a follow-up online survey of approximately 1,600 parents who reported waiting for child care in the last three years. This brief, three-minute survey was done to confirm and expand upon the findings in the original survey. The survey was in field between Nov. 7 and Nov. 11. Approximately 900 parents completed this follow-up survey with a completion rate of 96%.

<sup>1</sup> Excluding outliers taking more than 1 hour to complete the survey.

Several methods were used to increase compliance among parents. On Sept. 12, MCCA Executive Director Pat Wege issued a press release describing the upcoming survey. Several print and broadcast media outlets in Winnipeg produced news stories or articles about the survey. In early September, child care directors and home child care providers were also asked to inform parents of the upcoming survey and to encourage participation. In addition, as an incentive, a chance to win \$500 was offered by the MCCA to parents who completed the survey. Among parents who completed the follow-up survey on wait times, a draw for \$100 was offered as an incentive. The winners of both prizes have been selected and notified as of the writing of this report.

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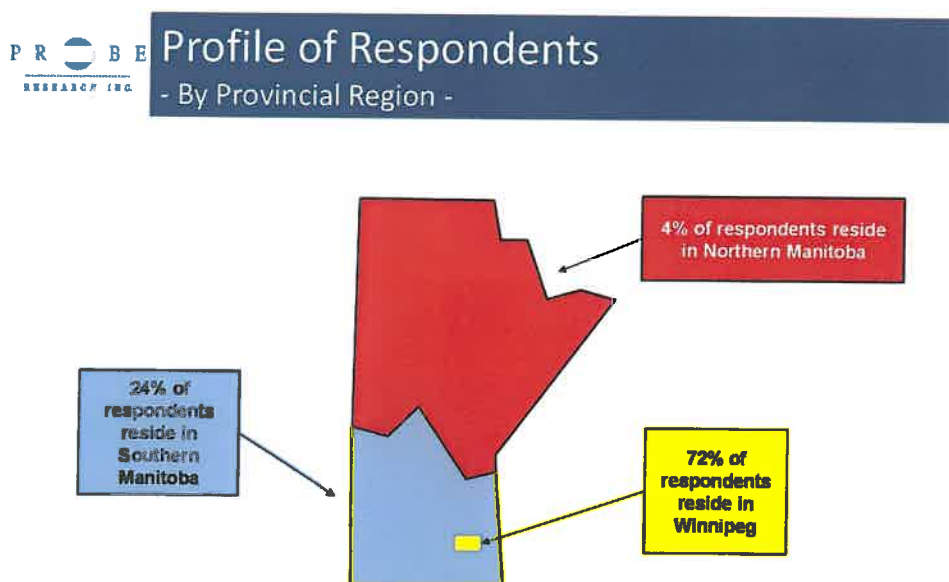


## 2.0 PROFILE OF RESPONDENTS

The following table outlines the socio-demographic make-up of parents participating in the survey.

TOTAL RESPONDENTS (n=3,081)			
		%	
REGION			
Winnipeg	72		
Non-Winnipeg	28		
INCOME			
Less than \$60K	23		
\$60K-\$100K	35		
\$100K-plus	42		
TYPE OF CARE USED			
Centre	79		
Licensed home	6		
Unlicensed home	2		
Family	3		
Multiple types	10		
		%	
GENDER			
Male	11		
Female	89		
EDUCATION			
High school or less	8		
Some post-secondary	26		
Graduated post-secondary	66		
NUMBER OF CHILDREN IN CHILD CARE			
One child	53		
Two children	40		
Three or more children	7		

The following illustration offers further detail on the regional break-down of respondents, based on forward sortation area (FSA).



Base: All respondents.

The 3,081 parents who responded to the survey represent approximately 4,774 children currently in child care.

Province-wide, there are approximately 34,000 licensed child care spaces in Manitoba<sup>2</sup>. Approximately 91 per cent of these spaces are located in child care centres, while nine per cent are located in family homes.

MCCA's member facilities break down in a similar fashion. MCCA's member facilities represent approximately 28,000 licensed spaces<sup>3</sup>. Approximately 91 per cent of these spaces are located in child care centres, while nine per cent are located in family homes.

There is very little data in Manitoba regarding the number of unlicensed child care homes in operation or the number of spaces those represent.

The following table outlines the types of child care used by all children captured by this Probe Research survey.

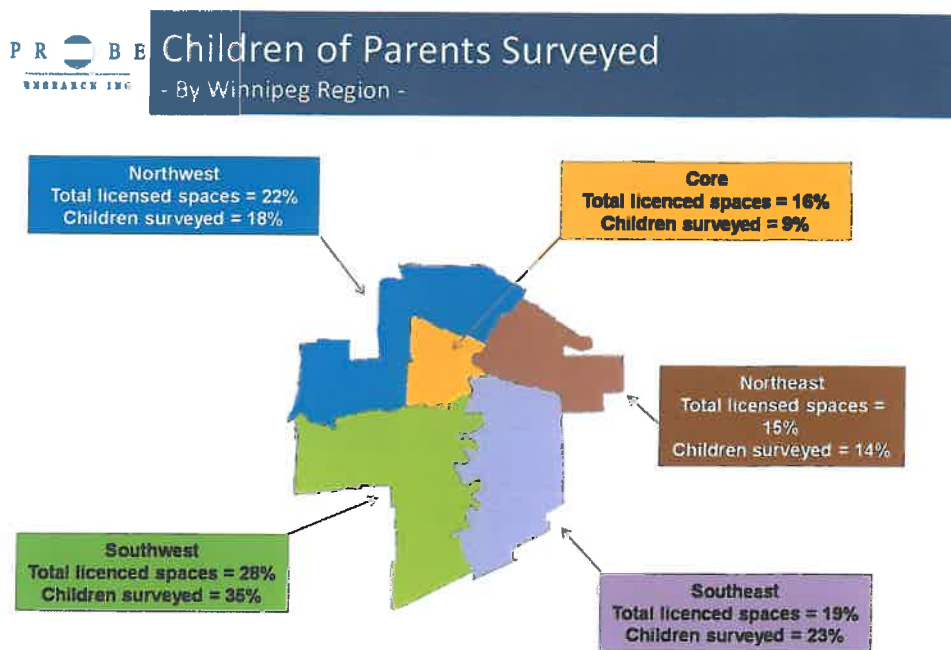
CHILDREN OF RESPONDENTS Total 4,774	
TYPE OF CHILD CARE USED	% OF TOTAL
Centre-based	82
Licensed home-based	7
Family member	6
Unlicensed home-based	4
Other (eg. nanny, respite)	1

<sup>2</sup> Source: Manitoba Family Services Annual Report 2015-2016.

<sup>3</sup> Sources: Manitoba Child Care Association member database; Child Care Online Licensed Child Care Search, <https://direct3.gov.mb.ca/daycare/fs/fs.nsf/welcome?openForm&LAN=1>



The following illustration compares the proportion of total licensed spaces per Winnipeg quadrant with the proportion of children captured by this Probe Research survey of parents.



Base: All respondents. Totals may not add to 100% due to rounding.

### 3.0 RESEARCH FINDINGS

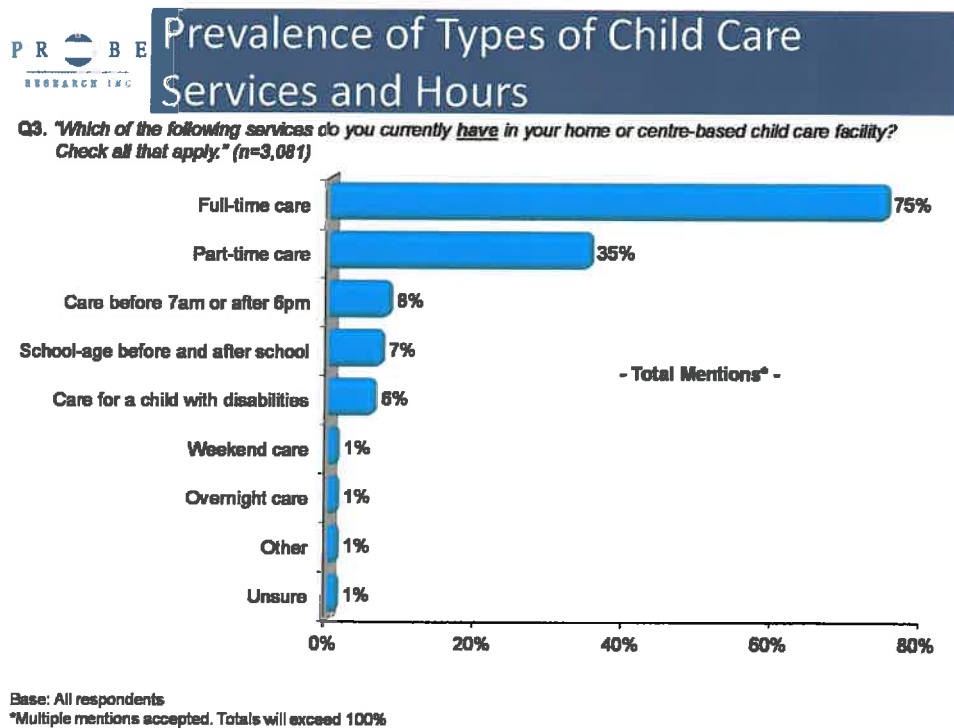
The following section provides a summary of the findings of the online survey conducted among parents using child care.

#### 3.1 Child Care Services and Satisfaction

This section explores the types of child care hours and services parents reported using, their satisfaction with those services and the gaps that exist.

##### 3.1.1 Prevalence of Type of Child Care Services and Hours

Three-in-four parents (75%) report using full-time child care, while one-third (35%) report having access to part-time care. Less than ten percent of parents report having access to after-hours, before-and-after school care or care for a child with disabilities. A very small proportion of respondents (1%) report having access to weekend child care.



Notable variations among respondents include:

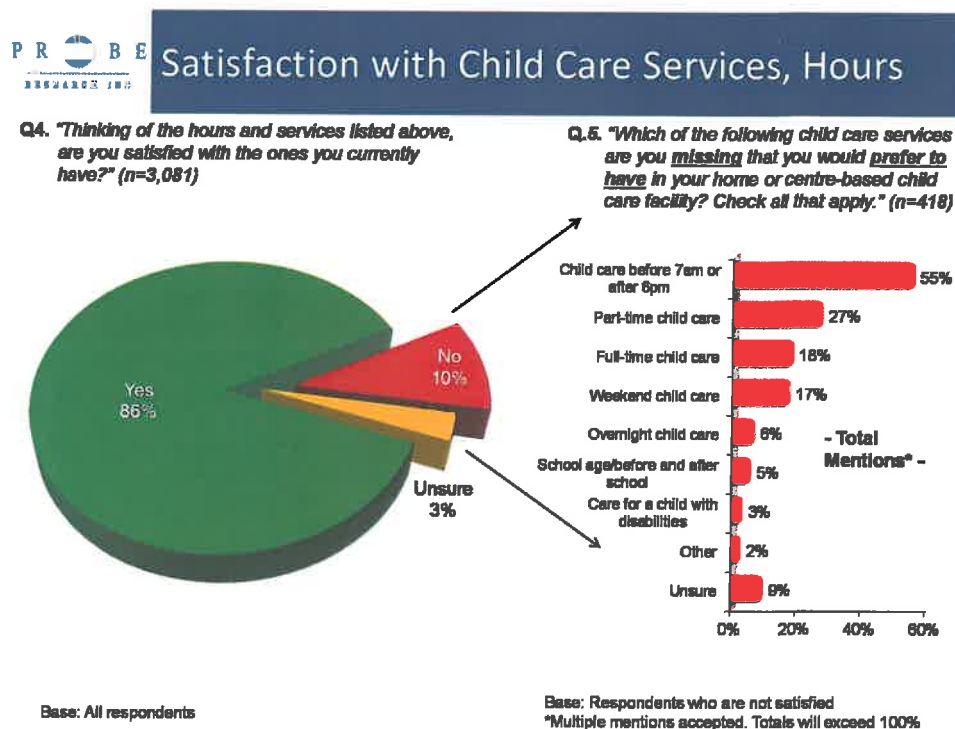
- Parents using "other" types of child care - typically nannies, family or friends - report the **lowest usage** of full-time care (46%). However, they report the **highest usage** of part-time care (52%).
- Parents in rural Manitoba are slightly **more likely** to have access to part-time child care (45%) than Winnipeg parents (30%). Rural parents are also **more likely** to use after-hours care (12%).
- Parents in Winnipeg's core neighbourhoods are **less likely** to have part-time care (27%).
- Parents using home-based child care (licensed and unlicensed) are **less likely** to have access to care for a child with a disability (2%).

- Parents with more children in child care are **more likely** to report using full-time care. For example, 81 per cent of parents with three children currently in care report using full-time services. Among parents with just one child in care, the figure drops to 70 per cent. Parents with three children in child care are also **more likely** to report using part-time care (43%) and after-hours care (17%)

### 3.1.2 Satisfaction with Child Care Services and Hours

When asked to indicate their overall level of satisfaction with the child care services and hours they have, an overwhelming majority of parents (86%) express satisfaction. Just one-in-ten (10%) say they are not satisfied.

Respondents who express dissatisfaction with their child care services and hours were asked which services they would prefer to have that they currently lack. More than one-half (54%) say they would prefer to have after-hours care, before 7 a.m. and after 6 p.m. More than one-quarter of parents surveyed (27%) wish to have part-time care.



Notable variations among respondents include:

- Parents who are **more likely** to be dissatisfied include those with children in multiple types of child care (21%) those using home-based care (15%), those in rural Manitoba (13%) and those with three or more children in care (15%).
- Parents who are **more likely** to be satisfied include those in Winnipeg (88%) and those with children in centre-based care (89%).
- Because of the small sample size, there are no statistically significant variations among demographic sub-groups regarding the types of services parents are missing that they would prefer to have.

## 3.2 Child Care Waits

This section explores the prevalence of waits among parents for a licensed space, the child care options parents chose while waiting and the length of time they report spending on a waiting list. The results in this section include data gathered from the original survey and the smaller, follow-up survey of parents who reported a wait for child care.

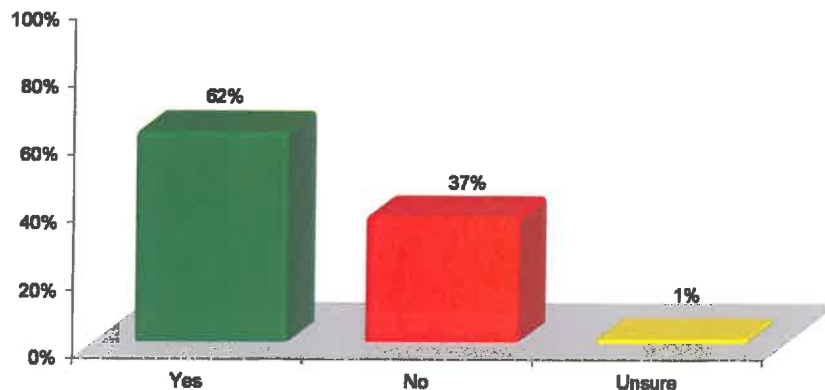
### 3.2.1 Prevalence of Waits for Child Care

Nearly two-thirds of parents (62%) say they have experienced a wait for licensed child care in the last three years. However, more than a third (37%) report no wait for child care.



#### Prevalence of Waits for Child Care

Q6. "In the last three years, have you had to wait for a space in a licensed child care facility in Manitoba?"  
(n=3,081)



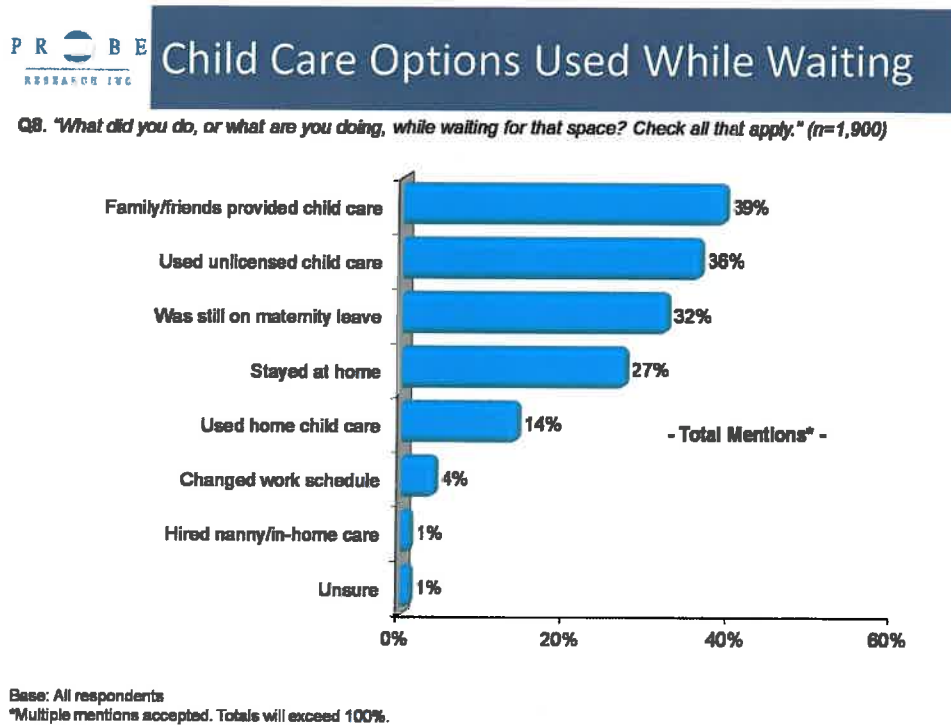
Base: All respondents

Notable variations among respondents include:

- Parents **more likely** to report waiting for a space included parents in multiple types of child care (78%), parents with infants (75%) or with children of multiple ages (70%) and parents with household incomes above \$100,000 (67%).
- Parents who are **less likely** to report waiting for a space include those in rural Manitoba (53%), those with school-age children (35%) and those with household incomes below \$60,000 (56%).

### 3.2.2 Child Care Options Used While Waiting

Nearly two-in-five parents (39%) who reported a wait for a licensed space turned to friends and family to provide child care during the wait. Nearly as many (36%) reported using unlicensed child care, while another 14 per cent of parents reported using home-based child care without specifying whether it was licensed or unlicensed.



Notable variations among respondents include:

- Parents **more likely** to use friends and family include those with children of multiple ages (45%) and those using multiple types of child care (59%).
- Parents **more likely** to use unlicensed care include those with children of multiple ages (43%), those using multiple types of child care (49%) and those in Winnipeg's northeast quadrant (48%).
- Parents of infants (26%), those living in Winnipeg's core (25%) and those with incomes under \$60,000 (28%) were **less likely** to use unlicensed child care.
- Parents who stayed at home were **more likely** to be low-income parents, those with household incomes below \$60,000 (42%), but **less likely** to be high-income parents, those with household incomes above \$100,000 (17%).

The results of the follow-up survey mirror the findings of the original survey on this question. In the follow-up survey, parents who reported still waiting for a licensed space were also asked what kind of child care they are using while waiting for a space to materialize. Most said they are using unlicensed care or friends and family in the interim. For example, among parents with one child using child care and still waiting for a space, 60 per cent said they were using unlicensed care or friends and family.

### 3.2.3 Types of Waiting Lists Used

In the follow-up online survey, parents who reported a wait for child care in the last three years were asked a series of additional questions to more precisely determine their experience. These questions pertained to children **currently** in child care and any wait times parents experienced for the child care space **currently** in use.

In a preliminary question, all parents in the follow-up survey were asked what kind of waiting list they used to obtain a space for each of their children currently in child care.

Generally, more than 40 per cent of parents placed their children on both the online and individual registries or on the online registry alone. The chart below outlines the types of waiting lists used by parents.

TOTAL RESPONDENTS (n=898)				
TYPE OF CHILD USING CHILD CARE	TYPE OF WAIT LIST USED			
	Online Registry	Individual centres and homes	Both	Unsure
Single child in child care	46%	12%	38%	3%
First of multiple children in child care	43%	11%	44%	1%
Second of multiple children in child care	41%	14%	43%	3%
Third of multiple children in child care	41%	12%	41%	6%



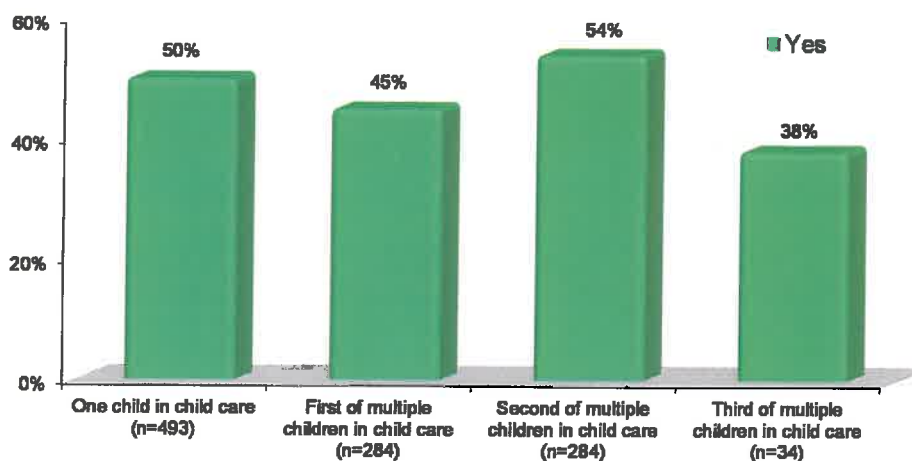
### 3.2.4 Space Availability When Needed

In the follow-up online survey, parents were asked whether they secured a licensed space by the time one was needed. Approximately half of parents reported securing a space when needed. For example, one-half of parents with one child in child care (50%) reported securing a space when they needed it. The figure was slightly lower (45%) among parents reporting on the experience of their first of multiple children in child care but slightly higher (54%) for the second child currently in child care. Only 38 per cent of parents with three or more children in child care were about to secure that space when required.



#### Space Availability When Needed

Q3. "Did you get this licensed space when your family needed it?"



Base: All respondents in the supplemental survey indicating "yes"

### 3.2.5 Average Length of Waits for Child Care

In the original survey, parents were asked how long they waited for a space in a licensed child care facility in the last three years. The average wait was approximately 15 months. As part of the follow-up online survey, Probe Research posed a series of more detailed questions about wait times of children in their current space.

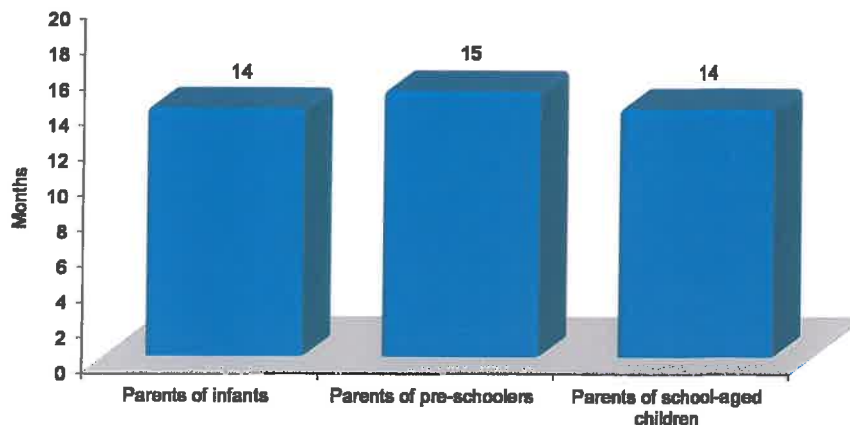
For the purposes of this report, Probe Research looked separately at parents who secured their current licensed space when they needed it and those who did not and are still waiting.

Among parents who secured a space, the average wait for that space ranged between 14 and 15 months from the time a parents placed their child's name on a waiting list. For example, among the parents of infants currently in child care, the average wait for their current space was 14 months.



## Average Length of Wait Times for Parents With a Space, in Months

Q4. "How long in advance did you put your child on the waiting list?" (n=468)



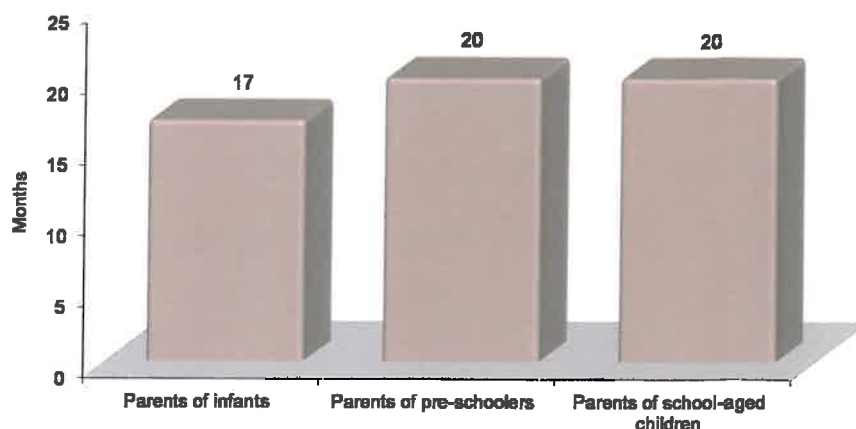
Base: All respondents who currently have licensed child care and reported a wait

Among parents **still waiting** for a licensed space, the wait was longer, ranging between 17 and 20 months, depending on the age of the child.



## Average Length of Wait Times for Parents Still Waiting for a Space, in Months

Q4. "How long have you been waiting, from the time you placed your child on the list until now?" (n=436)



Base: All respondents who currently do not have a licensed child care space and reported a wait

### 3.2.6 Prevalence of Preferred Space

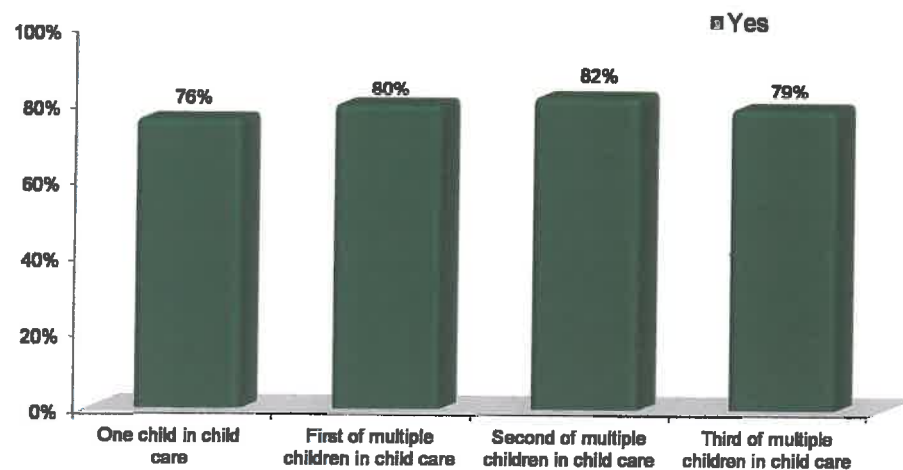
In the follow-up survey of parents, a majority of parents reported securing a space in their preferred facility. For example, 76 per cent of parents with one child currently in child care say

they secured a spot in a preferred facility. Among parents with two children in child care, 82 per cent said they received a spot in their preferred facility for their second child, a slightly higher rate which may be due to the practice of “grandfathering in” siblings.



## Prevalence of Preferred Space

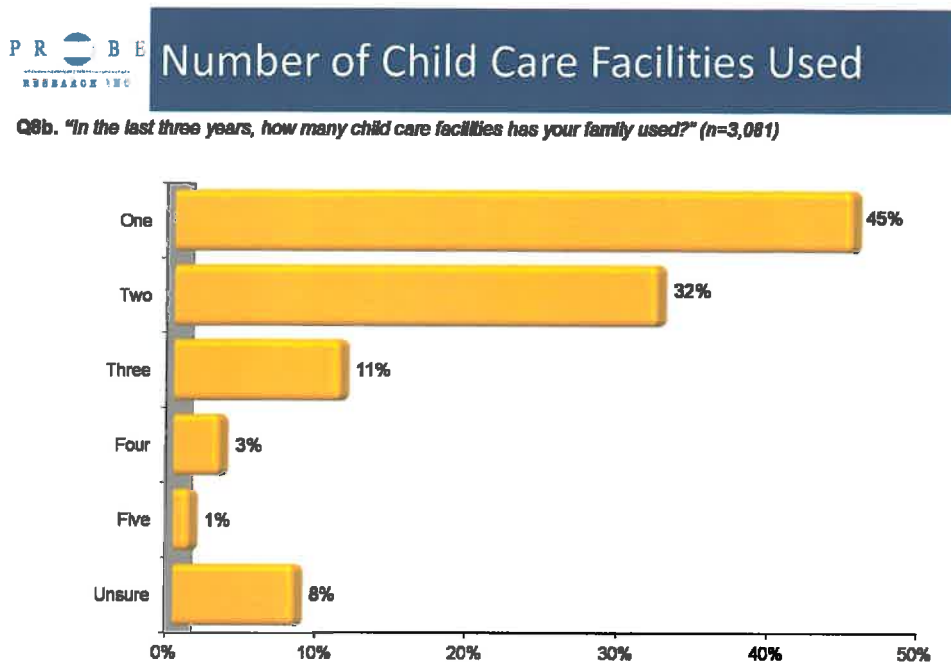
Q8. "Did you get a space at your preferred facility?" (n=898)



Base: All respondents in the supplemental survey indicating "yes".

### 3.2.7 Number of Child Care Facilities Used

Most parents surveyed in the original survey (45%) have only used one child care facility in the last three years. Nearly one-third (32%) report using two facilities.



Base: All respondents

Notable variations among respondents include:

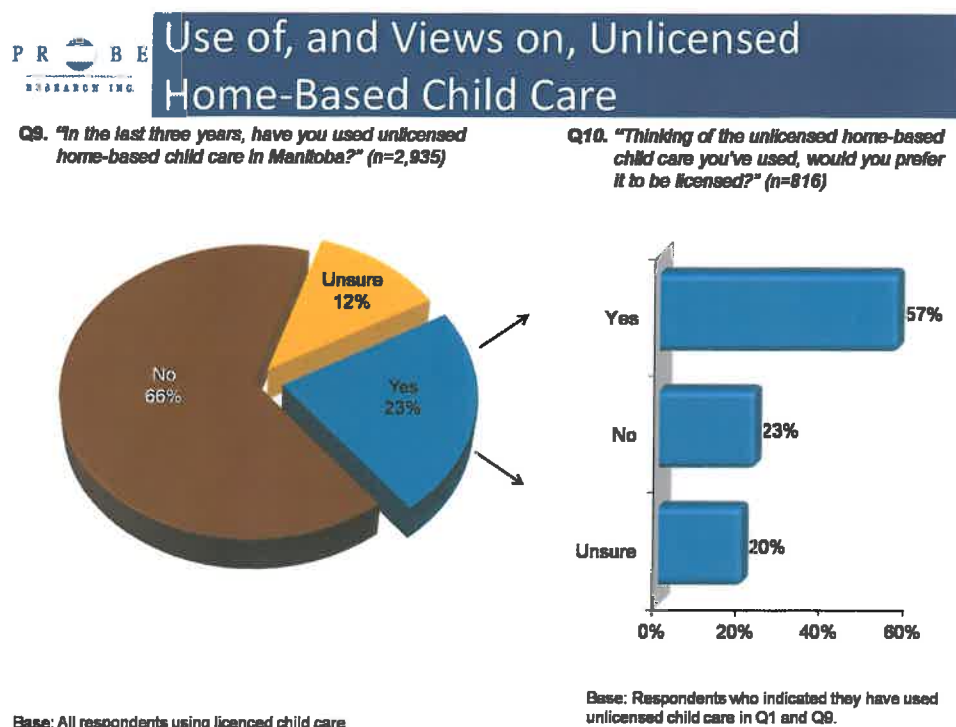
- Lower income parents, those with annual household incomes below \$60,000, are **more likely** to have used just one facility (53%).
- Parents of infants are, not surprisingly, **more likely** to have used just one facility (64%). However 22 per cent report using two facilities. Similarly, parents of school-age children are also **more likely** to have used one facility in the last three years (55%).
- Also not surprisingly, parents with more than one child in child care tended to use more facilities. For example, 19 per cent of parents with three or more children in care report using three separate facilities in the last three years.

### 3.3 Unlicensed Child Care

This section of the report reveals parents' experiences and satisfaction levels with unlicensed home-base child care.

#### 3.3.1 Use of, and Views on, Unlicensed Home-Based Child Care

Two-thirds of parents (66%) surveyed had not used unlicensed home-based child care in the last three years. However, nearly one-in-four parents (23%) had. Among those, well over half (57%) would have preferred if their unlicensed home had been licensed.



Notable variations among respondents include:

- Parents **more likely** to have used unlicensed home-based child care include those with two children in care (28%), those with children in multiple types of child care (34%) and those living in Winnipeg's northeast quadrant (32%).
- Parents who are **less likely** to have used unlicensed home-based child care include those with school-aged children (15%), those with low incomes (17%) and those living in Winnipeg's core neighbourhoods (16%).
- Low-income parents are **more likely** to prefer their unlicensed home be licensed (70%). Parents with infants are also **more likely** to prefer their unlicensed home had been licensed (68%).

### 3.3.2 Satisfaction with Unlicensed Home-Based Child Care

Nearly two-thirds of parents said they were satisfied with the unlicensed home-based child care they have used. More than one-quarter (27%) said they were very satisfied (a "7" on a one-to-seven scale). However, one-quarter (25%) said they were not satisfied with their experience with unlicensed home-based care, including one-in-ten (10%) who said they were not at all satisfied (a "1" on the one-to-seven scale).



Base: Respondents who use or used unlicensed home-based child care

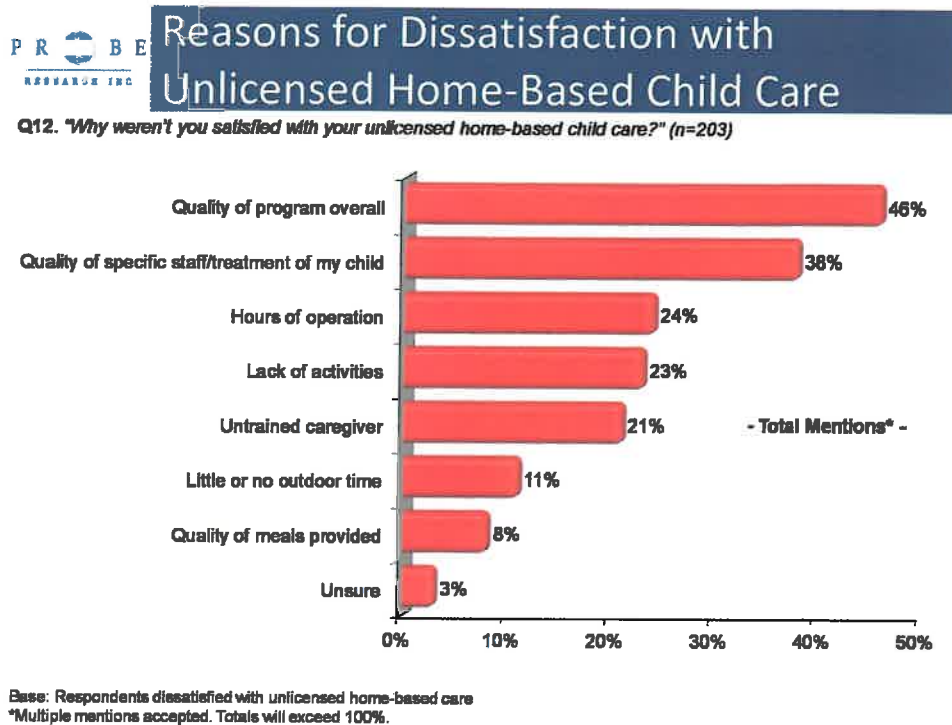
Notable variations among respondents include:

- Because of the relatively small sample size, few statistically-significant differences among demographic groups could be detected. However, parents with children in multiple types of child care are **more likely** to be satisfied with the unlicensed home-based care they have used (73%). In addition, parents with three or more children in child care are also **more likely** to be satisfied with their unlicensed home-based care (80%).



### 3.3.3 Reasons for Dissatisfaction with Unlicensed Home-Based Child Care

Parents who noted their dissatisfaction with the unlicensed home-based child care they used in the last three years were asked to provide the reasons for their dissatisfaction. The majority cited the quality of the program or of staff as top reasons for dissatisfaction. Nearly one-half (46%) said they were unhappy with the quality of the program overall, while well over one-third (38%) noted their dissatisfaction with individual staff or the treatment of their child. Nearly one-in-four (23%) noted the lack of activities and more than one-in-five parents (21%) cited a lack of training among caregivers.



Because of the relatively small sample size, no statistically-significant differences among demographic subgroups could be detected.

Below is a selection of parent responses to this open-ended question:

- *The food quality was poor, the children rarely, if ever, went outside, the TV was always on. Overall it wasn't childcare, it was simply making sure my child didn't die while I was at work and for a very expensive fee.*
- *Unreliable availability. Too many sick days and holidays. We were left without care a lot.*
- *Unstructured routine, nutrition, curriculum. Abrupt withdrawal of care despite long-standing arrangements in advance of start date. No receipts. Little accountability. Poor communication.*
- *One of them was excellent the other had the children watching too much TV and no crafts, activities.*
- *Not enough organized activities, no safety regulations, cost was increased substantially and I had no recourse as I needed the care, location was an apartment and there was not enough room, children did not spend enough time outside, etc.*

### 3.4 Parent Preferences and Satisfaction

This section explores the preferences of parents when choosing a child care facility, a self-assessment of their ability to recognize a quality program and their overall level of satisfaction with their current facility.

#### 3.4.1 Important Qualities in Child Care Facility

The quality of a child care program, including staff competence and educational programming, ranked among the most important elements parents look for when choosing child care for their children. Nearly two-in-five parents mentioned educational programs and activities (38%) as well as warm and caring staff (38%). Nearly one-third of parents surveyed (32%) mentioned trained staff as a key driver of their child care choices.

Less important to parents were other, more tangible quality measures, such as the staff-to-child ratio (5%) or the centre's licensing status (11%).

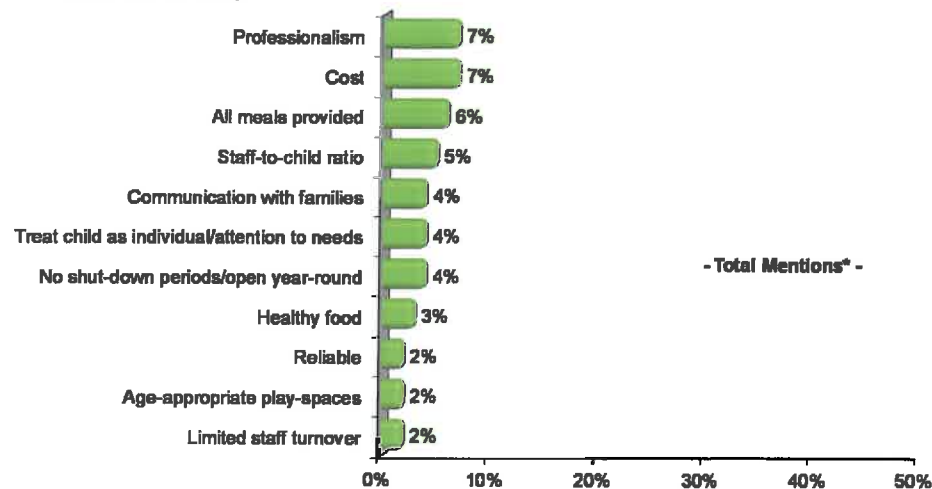


Parents surveyed placed some importance on the more fixed or practical elements of choosing a child care facility, such as cleanliness (27%), safety (24%) and convenience close to home or work (23%). However other more practical elements of child care choices such as the cost (7%) and the provision of meals (6%) ranked of lower importance among parents.



## Less Important Qualities in a Facility

Q13. "When choosing a child care facility, what are the most important qualities you look for? Please list as many as you like." (n=1,000)



Base: Randomly selected respondents  
Multiple mentions accepted.

There are few statistically-significant differences among demographic sub-groups.

Below is a selection of parent responses to this open-ended question:

- *That they provide safe care of my child in a learning environment to help him develop to his full potential. By doing this I look for something that has structure to the day, and has opportunities for my child. Warm and safe care by the staff. Staff who are willing and eager to speak with me about how my child's day was, and update me on things I need to know. Staff that respect the choices that we make for our child.*
- *Licensed, their philosophy, staff turnover, location, programming, how the staff interacts with children and parents, condition of the toys and equipment, clean and safe environment.*
- *We wanted a licensed centre, due to hours & programs for our child. We wanted to ensure that our child was getting the best possible care & early education & not sitting in front of a TV.*
- *Facility well run and maintained, safety for all; building, hazards, pickup/drop off, good educational programming and enrichment, helpful, caring and loving staff, good communication, as to the daily ongoings, good outdoor space for play, structured learning through activity and play, a program that builds and encourages healthy relationships with other children and teaches self-control and understanding of empathy.*
- *If meals or snacks are provided, the quality of the nutrition (are they healthy?), hours of operation/availability, the location and whether it's close to home or on our commute to-and-from work, closures throughout the year/holidays, the price/rate, the number of children to staff/caregiver ratio.*

### 3.4.2 Child Care Preferences

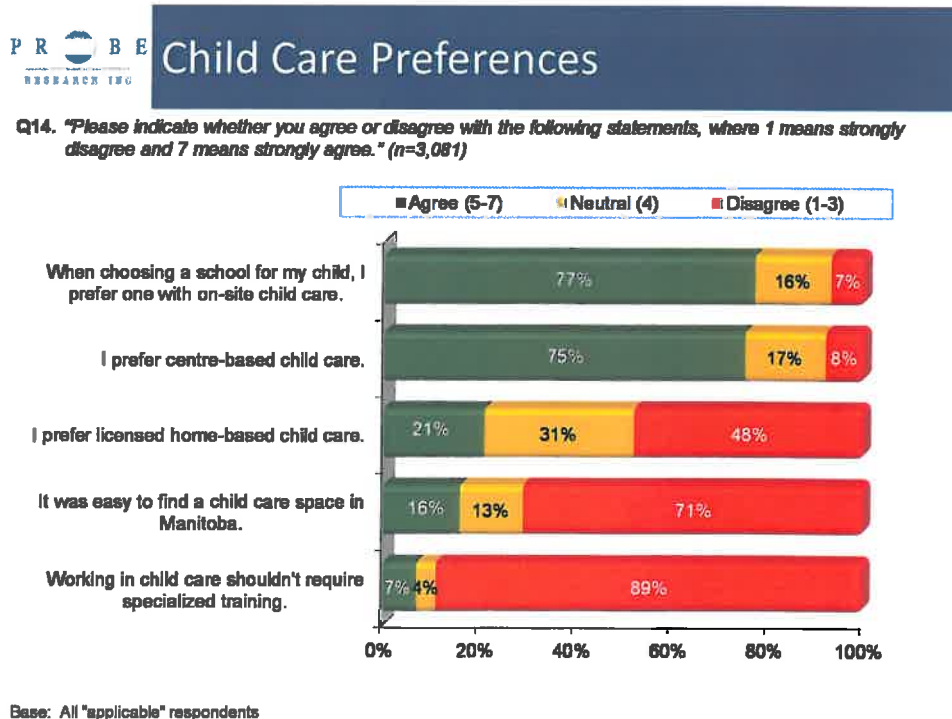
Parents were asked a series of questions about their child care preferences and experiences, including their inclination toward different types of child care.

Parents overwhelmingly (77%) favoured the availability of on-site child care when choosing a school. Support was particularly strong among parents in Winnipeg's southwest quadrant (86%) and among parents of school-age children (84%). Support for on-site school child care was weaker among rural residents (63%), among the parents of infants (70%), among those who use home-based child care (68%).

Parents also strongly rejected the suggestion it was easy to find a child care space in Manitoba. Nearly three-quarters of those surveyed (71%) disagreed with this suggestion. Nearly one-half (45%) strongly disagreed (a "1" on a one-to-seven scale). Parents in the southeast and southwest quadrants of Winnipeg were more likely to disagree (77%) as were parents with children in multiple types of child care (82%). However, parents in rural Manitoba were less likely to disagree (61%).

It is worth noting the general public is slightly more likely than parents to disagree with the statement it's easy to find a child care space in Manitoba. A public opinion survey conducted via telephone by Probe Research for the MCCA in September found nearly four-in-five Manitobans (78%) disagreed with the statement.

Parents overwhelmingly support specialized training for child care staff. Nearly nine-in-ten parents (89%) disagreed that working in child care shouldn't require specialized training. Support for specialized training was uniformly high across all demographics, including among parents with children in home-based child care (85%). Parents in Winnipeg's northwest quadrant were slightly more likely to agree (93%).



### 3.4.3 Preference for Home or Centre-Based Child Care

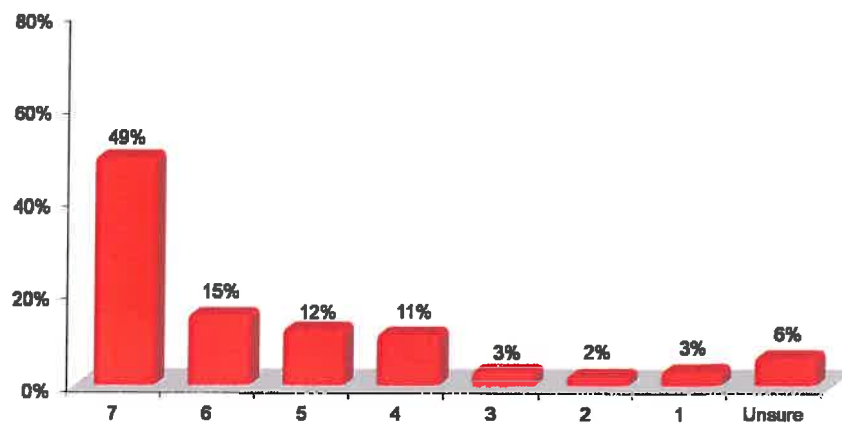
Three-quarters of parents surveyed (75%) agree they prefer centre-based child care, with nearly half (49%) stating they strongly agree (a "7" on a one-to-seven scale).

More than two-in-five parents (42%) with children currently in home-based care (licensed and unlicensed) agree they prefer centre-based care.



#### Preference for Centre-Based Child Care

**Q14b.** "Please indicate whether you agree or disagree with the following statements, where 1 means strongly disagree and 7 means strongly agree... I prefer centre-based child care." (n=3,081)



Base: All "applicable" respondents

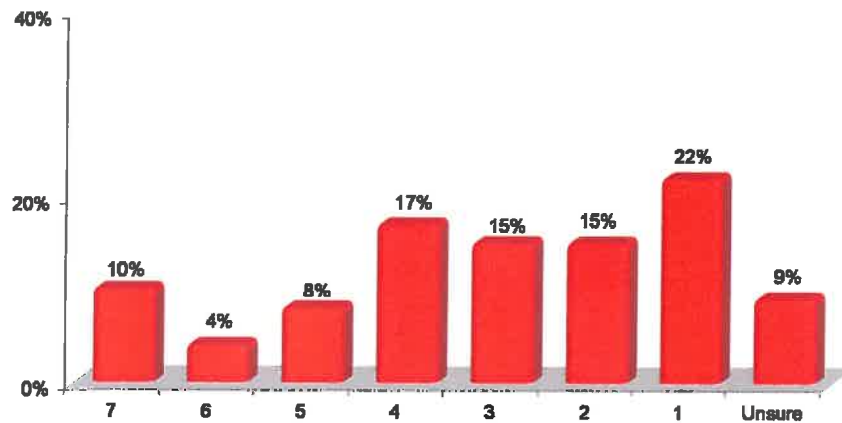
Parents are somewhat split on their preference for home-based child care. More than one-in-five parents (21%) said they prefer licensed home-based care while nearly one-half (48%) said they did not. A significant number of parents (31%) were neutral or unsure.

Parents with infants were **more likely** to favour home-based care (27%).



## Preference for Home-Based Child Care

**Q14a.** *Please indicate whether you agree or disagree with the following statements, where 1 means strongly disagree and 7 means strongly agree... I prefer licensed home-based child care.* (n=3,081)



Base: All "applicable" respondents



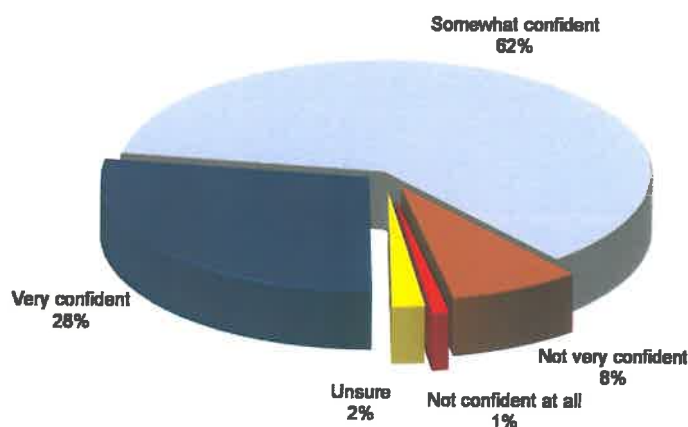
### 3.4.4 Self-Assessment of Ability to Determine Quality

The overwhelming majority of parents (90%) expressed confidence in their ability to determine the quality of a child care facility with more than one-quarter (28%) stating they felt very confident in their ability to tell a “good” facility from a “bad” one.

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## Confidence in Ability to Distinguish Quality of Facility

**Q15. “When visiting a potential child care facility, do you feel you can tell the difference between a “good” facility and a “bad” one? In other words, how confident are you in your ability to identify a high-quality child care facility?” (n=3,081)**



Base: All Respondents

Notable variations among respondents include:

- Parents using “other” types of child care – including nannies, unlicensed homes and family or friends – expressed less intense levels of confidence in their ability to determine quality. Only 19 per cent said they were very confident in their ability.

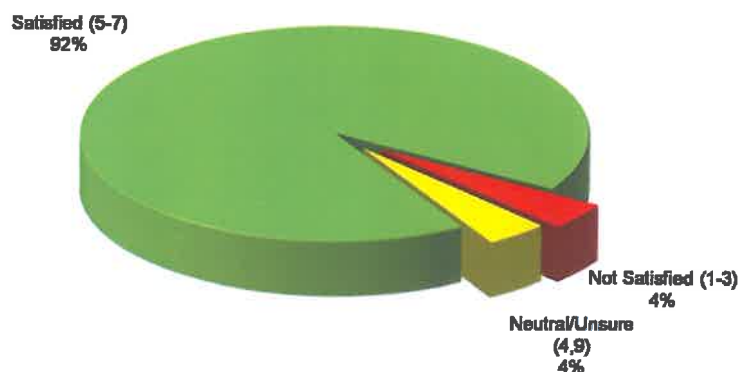
### 3.4.5 Overall Satisfaction with Current Child Care Facility

More than nine-in-ten parents expressed satisfaction with their current child care facilities, with almost one-half (46%) stating they are very satisfied (a “7” on a one-to-seven scale).



#### Satisfaction with Child Care Overall

Q16. "All things considered, how satisfied are you with your current child care facility or facilities overall? Please use the scale below where 1 means you are "not at all satisfied" and 7 means you are "very satisfied" overall." (n=3,081)



Base: All Respondents

Notable variations among respondents include:

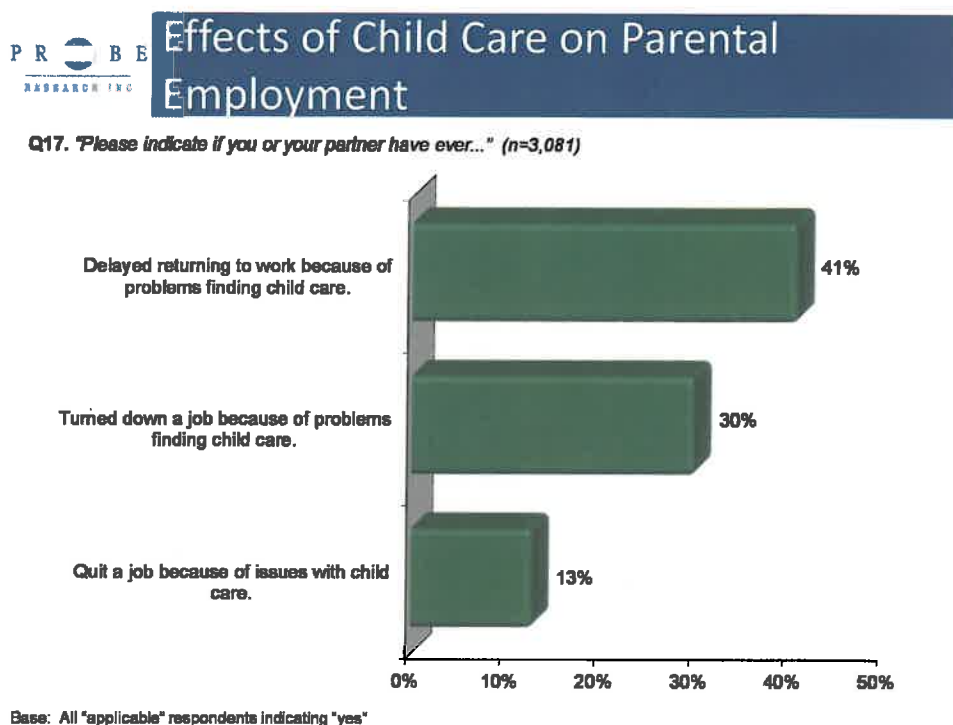
- Parents in rural Manitoba were **slightly less likely** to be very satisfied (42%).
- Parents using licensed home-based care are **more likely** to be very satisfied (60%).
- Parents using “other” types of child care – including unlicensed homes, nannies or family and friends – are **less satisfied** with their child care. Approximately 79 per cent said they were satisfied, with one-third (35%) saying they are very satisfied. More than one-in-ten (12%) said they were not satisfied.

### 3.5 Effect of Child Care on Employment and Education

This section explores the effect of child care on parents' employment and educational opportunities.

#### 3.5.1 Effect of Child Care on Parental Employment

A significant number of parents reported that a lack of child care affected their employment opportunities. More than two-in-five (41%) said they had delayed returning to work while nearly one-third (30%) reported turning down a job because of problems finding child care. A smaller proportion, 13 per cent, said they had quit a job due to child care.

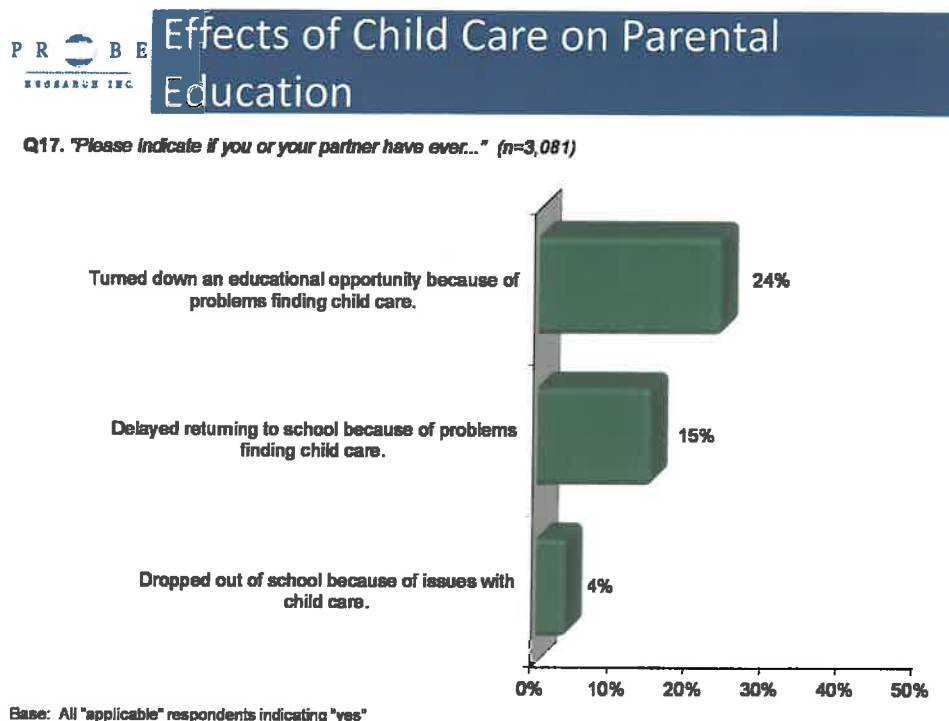


Notable variations among respondents include:

- Low-income parents, those with household incomes below \$60,000, reported **higher rates** of turning down a job (46%), delaying a return to work (47%) or quitting a job (25%) due to child care problems. Among higher-income parents, those earning \$100,000 or more, **fewer** turned down a job (19%), delayed returning to work (35%) or quit a job (6%) due to child care.
- Some notable geographic variations also exist. **More** parents in Winnipeg's northwest quadrant report turning down a job (37%) while **fewer** rural residents (35%) report delaying a return to work due to child care issues.
- Parents with children in "mixed" types of child care – typically a centre and a home – report **higher rates** of turning down a job (39%) and delaying a return to work (50%). Similarly, parents using "other" types of care – typically an unlicensed home, nannies or friends and family – report **higher rates** of turning down a job (49%) and delaying a return to work (53%).

### 3.5.2 Effect of Child Care on Parental Education

Nearly one-quarter of parents surveyed (24%) reported turning down an educational opportunity because of problems finding child care, while nearly one-in-six parents said they had delayed returning to school.

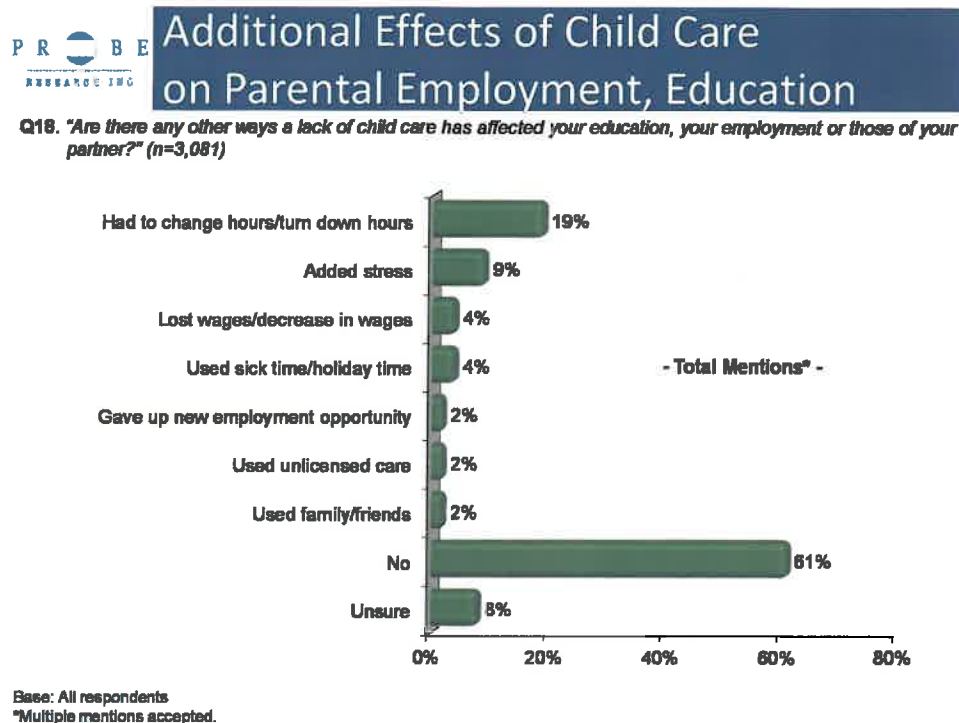


Notable variations among respondents include:

- Low-income parents, those with household incomes below \$60,000, reported **higher rates** of turning down an educational opportunity (35%) and delaying a return to school (31%) due to child care problems. Among higher-income parents, those earning \$100,000 or more, fewer turned down an educational opportunity (16%) or delayed returning to work (6%) due to child care.
- Some notable geographic variations also exist. More parents in Winnipeg's northwest and core neighbourhoods report delaying a return to school (22% and 25% respectively).
- Parents using home-based child care – both licensed and unlicensed – were **more likely** to delay returning to school (24%).
- Parents with three or more children were **more likely** to turn down educational opportunities due to child care (35%)

### 3.5.3 Additional Effects on Child Care on Parental Employment and Education

In a follow-up question, parents were asked if there were any other ways child care had affected their education or employment. Nearly one-in-five (19%) said they had altered working hours or declined extra hours due to child care issues. Nearly one-in-ten (9%) noted child care had created more stress related to work or school obligations.



Notable variations among respondents include:

- Parents using multiple types of child care reported **higher rates** of changing or turning down hours (26%). Parents with three or more children also reported **higher rates** of altering or refusing hours (27%).

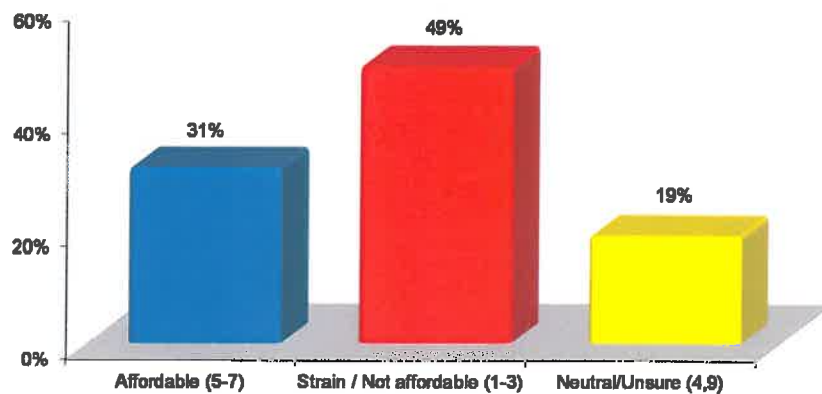
### 3.6 Child Care Costs

Parents were asked for their views on the cost of child care relative to their household budgets. Nearly one-third (31%) said their child care fees are affordable while nearly half (49%) said their fees are a strain on their household budget or not affordable. A significant number of parents surveyed said they were neutral on the question.



#### Views on Cost of Child Care

Q19. "Thinking about the child care services you receive and the fees you pay, how would you characterize the effect on your household budget? Please use the scale below where 1 means your child care fees are "a big strain on your budget" and 7 means your fees are "very affordable." (n=3,081)



Base: All Respondents

Notable variations among respondents include:

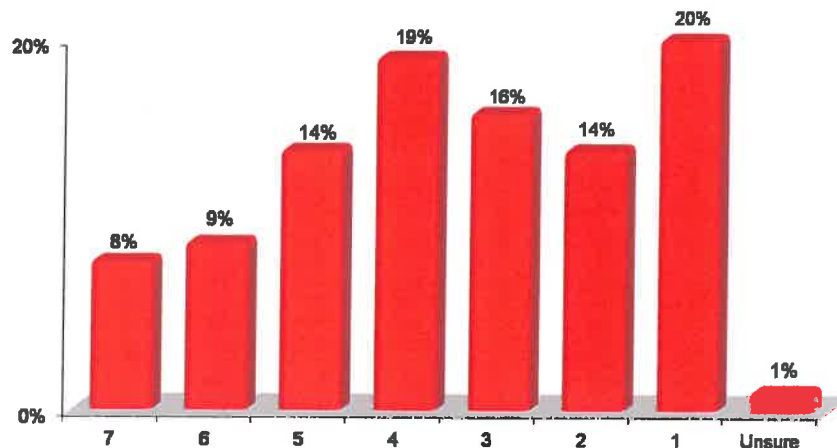
- Parents **more likely** to report that child care fees are not affordable include those using multiple types of child care (57%), those with three children or more in care (61%) and parents who are low income, those earning under \$60,000 yearly (57%). Middle income families, those earning between \$60,000 and \$100,000 yearly, also considered child care expenses not affordable (58%).





## Views on Cost of Child Care

Q19. "Thinking about the child care services you receive and the fees you pay, how would you characterize the effect on your household budget? Please use the scale below where 1 means your child care fees are "a big strain on your budget" and 7 means your fees are "very affordable." (n=3,081)



Base: All respondents

Notable variations among respondents include:

- Those parents **more likely** to consider child care fees a big strain on their household budgets, a "1" on the one-to-seven scale, include those earning less than \$60,000 yearly (29%), those with three children or more in child care (31%) and those living in Winnipeg's northwest quadrant (26%).

### **3.7 Views on Possible Changes to Child Care in Manitoba**

Parents were surveyed on several possible changes to Manitoba's child care system, including the possibility of higher parent fees, altering ratio rules and several other options. There was widespread agreement on several questions.

More than four-in-five parents (83%) agreed licensing is important to ensure quality, with few notable variations among demographic subgroups. Residents of northwest Winnipeg were slightly more likely to agree (89%) while parents using home-based child care, both licensed and unlicensed, were less likely to agree (71%).

More than three-quarters of parents (77%) agreed child care centres should be built as part of new developments. More likely to agree are Winnipeg parents (81%), especially those in the southwest quadrant (84%) and the southeast quadrant (85%), as well as wealthier parents, those with household incomes over \$100,000 (81%). Less likely to agree are parents in rural Manitoba (67%) and those with lower annual incomes (71%).

A similar proportion of parents, 77 per cent, opposed altering ratio rules to allow more children per worker. More likely to oppose altering ratio rules include parents of infants (83%) and higher-income parents (83%). Less likely to oppose altering ratio rules include parents using licensed homes (68%) and low-income parents (66%).

Three-quarters of parents (75%) also agreed child care should be part of the education system, with little variation across sub-groups. The exception is rural parents, only 70 per cent of whom agreed child care ought to be part of the education system.

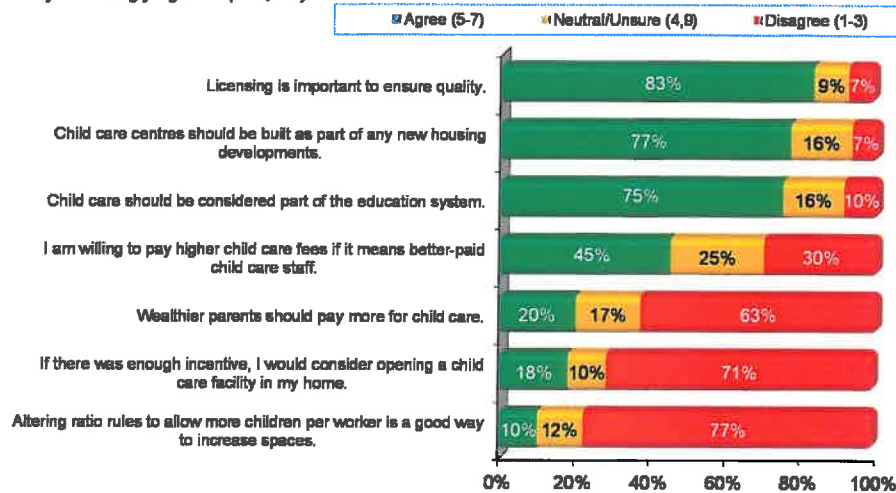
The majority of parents (71%) said they would not be willing to offer child care in their home. Nearly one-in-five (18%) agreed they would. Those more likely to open a home-based child care facility include parents with children already in home-based care (29%), parents living in the northwest quadrant of the city (24%) and lower-income parents (30%).

Nearly two-thirds of parents (63%) did not agree that wealthier parents should pay more for child care. One-in five parents agreed. Parents in the core of Winnipeg (29%) and lower-income parents (27%) were more likely to favour a move to ensure wealthier parents pay more for child care. Those least likely to favour such a move include rural residents (72% disagree).



## Views on Changes to Child Care Policy

**Q20.** "Thinking about possible changes to Manitoba's child care system, please indicate if you agree or disagree with the following statements using the 1 to 7 scale where 1 means you "strongly disagree" and 7 means you "strongly agree." (n=3,081)



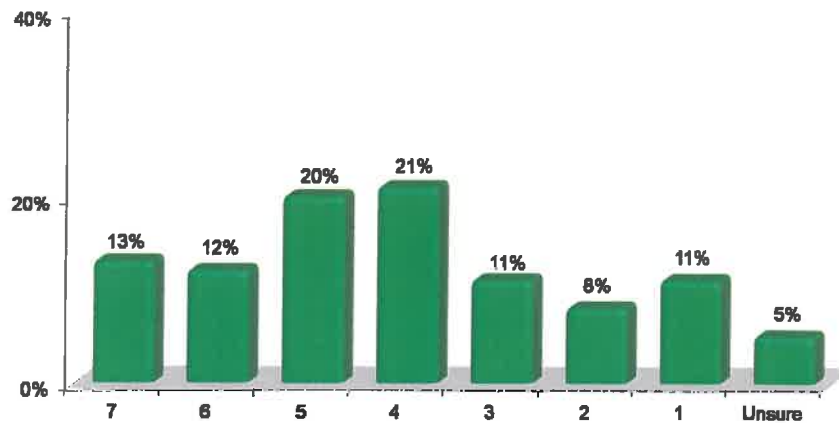
Base: All respondents  
Options presented in random order

### 3.7.1 Willingness to Pay Higher Fees to Improve Staff Pay

Parents surveyed were split when asked whether they are willing to pay higher child care fees if that ensured better-paid child care staff. Not quite half (45%) agreed, while nearly one-third (30%) disagreed. A significant number, 25 per cent, were neutral or unsure.

#### Willingness to Pay Higher Fees to Improve Staff Pay

**Q20a.** "Thinking about possible changes to Manitoba's child care system, please indicate if you agree or disagree with the following statements using the 1 to 7 scale where 1 means you "strongly disagree" and 7 means you "strongly agree"... I am willing to pay higher child care fees if it means better-paid child care staff." (n=3,081)



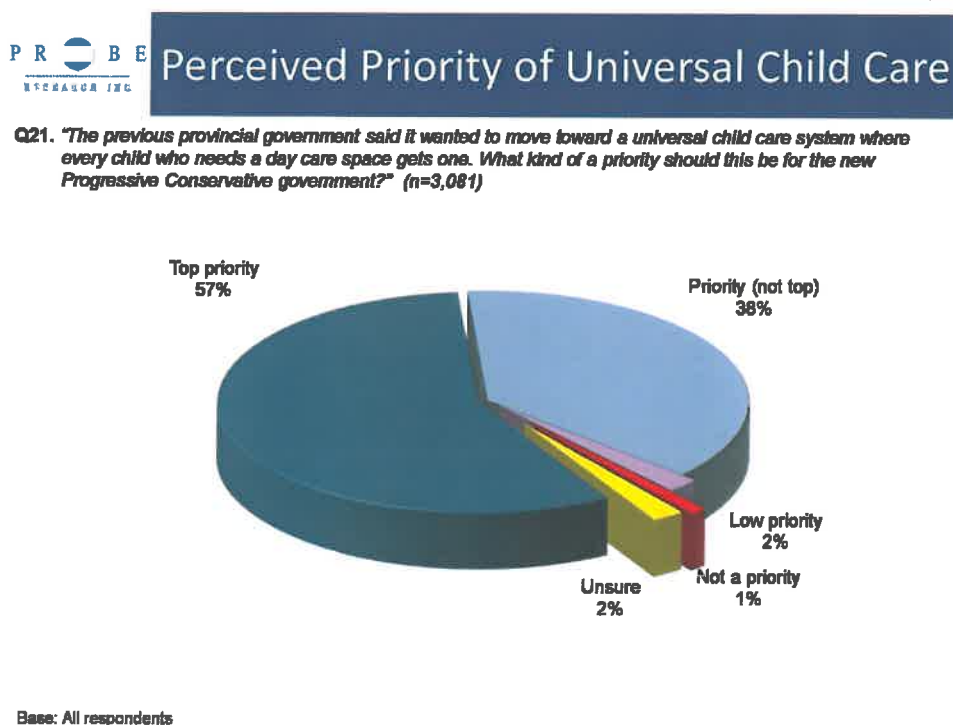
Base: All respondents

The notable variation among respondents was based on income levels. Lower-income parents were less willing to pay higher fees (40% disagree) while higher-income parents were more willing (57% agree).

### 3.7.2 Priority of Universal Child Care

Nearly all parents (95%) said universal child care should be a priority for the new Progressive Conservative government, with a majority (57%) saying it should be a top priority.

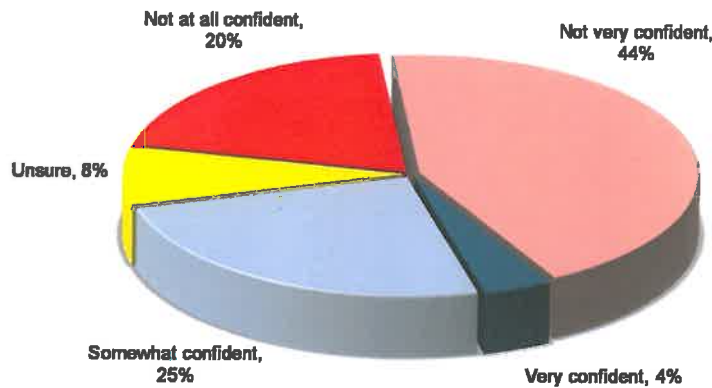
It is worth noting the general public is **less likely** than parents to agree a universal system ought to be a priority for government. A public opinion survey conducted via telephone by Probe Research for the MCCA in September found more than three-quarters of Manitobans (76%) agreed with the statement.



There were no notable variations in demographic sub-groups.

### 3.7.3 Confidence in the Provincial Government's Ability to Increase Child Care Spaces

Most parents – 64 per cent – did not express confidence in the provincial government's ability to increase spaces without sacrificing the quality of care. One-in-five (20%) said they were not at all confident.

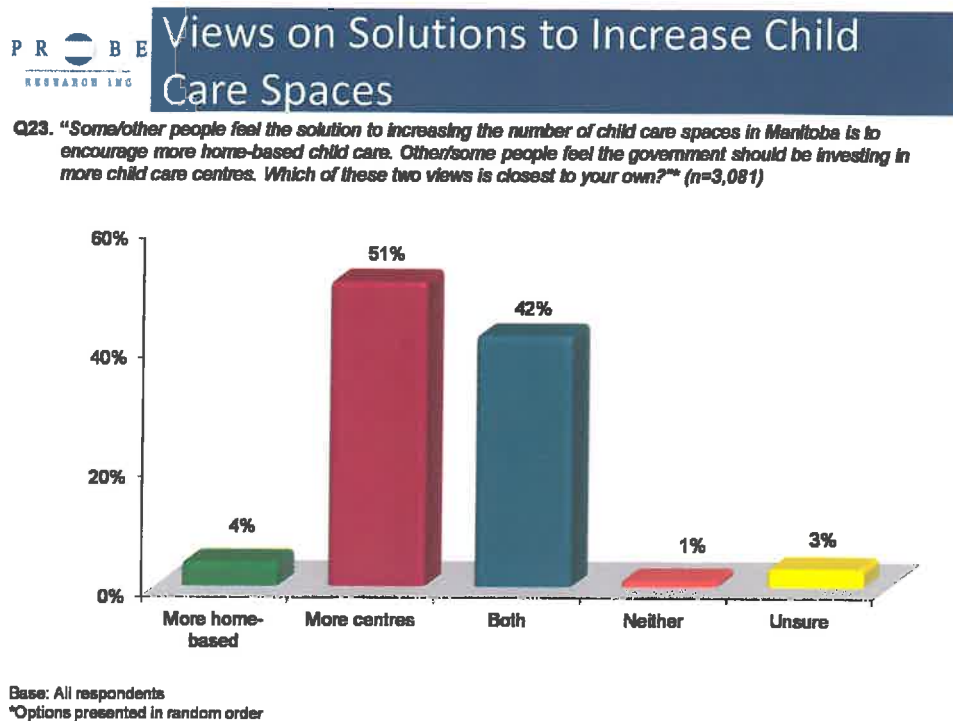


Base: All respondents

There were few notable variations in demographic sub-groups.

### 3.7.4 Views on Solutions to Increase Child Care Spaces

One-half of parents surveyed (51%) favoured more centres as the solution to increase child care spaces in Manitoba. More than two-in-five parents (42%) favoured both home-based and centre-based care. Very few parents – 4 per cent – favoured more home-based child care alone.



Notable variations among respondents include:

- Rural residents were **less likely** to favour more centre-based care (44%).
- Not surprisingly, parents using home-based care, both licensed and unlicensed, were slightly **more likely** to favour the creation of more home-based spaces (13%). They were also **more likely** to favour both types of spaces, centre and home-based (56%).

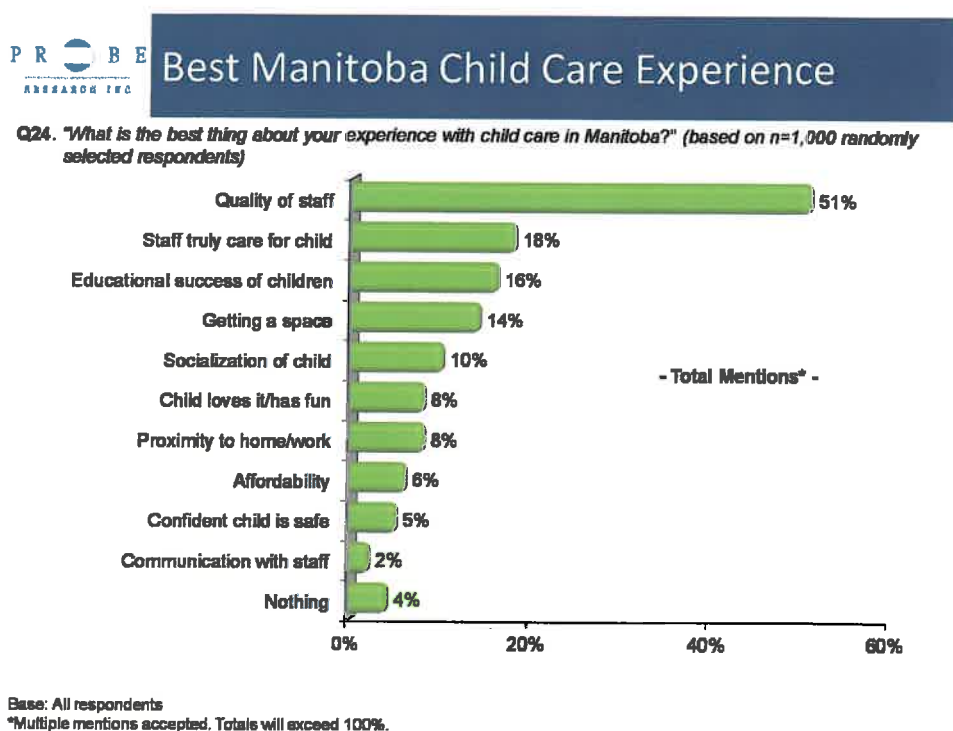


### 3.8 Best and Worst Things about Child Care in Manitoba

Parents were asked two open-ended questions that allowed them, in their own words, to describe the best and worst things about their experiences with child care in the province.

#### 3.8.1 Best Thing About Child Care Experience

The majority of parents (51%) cited the quality of staff as the best thing about their experience with child care in Manitoba. Nearly one-in-five (18%) offered a similar answer, highlighting staff who truly care for children as a favourable aspect of child care in Manitoba. Nearly as many – 16 per cent – noted the educational success of their children using child care.



Because of the relatively small sample size of 1,000 coded responses, there were few statistically-significant variations among respondents.

However, parents using licensed home-based care were **less enthusiastic** about the quality of staff. Only 38 per cent noted staff quality as the best thing about child care in Manitoba.

Below is a selection of parent responses to this open-ended question:

- *Watching our daughter bond with child care workers and develop in ways that we couldn't have predicted.*
- *My home based provider has become a part of our family.*
- *All of the child care centres I have had my kids at (licensed and unlicensed) have provided wonderful care to my children.*
- *My son has met some lovely people that care about him.*
- *That I feel comfortable and confident in the child care facility when I drop them off every day before I leave for work.*
- *Wonderful, supportive, caring, knowledgeable staff. Very satisfied with the daycare I use.*
- *The sibling advantage; otherwise we would still be waiting for my 18-month-old to have a spot.*
- *We are very fortunate about the child care centres we have presently. It is a home away from home for my children. The staff feel like extended family members. My boys' school age program in the school is very convenient. All schools should have childcare.*
- *My daughter is well cared for and loves each day.*
- *Our ability to speak freely with the staff and the coordinator about our concerns/issues.*

### 3.8.2 Worst Thing About Child Care Experience

A majority of parents (51%) said the worst thing about the experience with child care was the inability to secure a space or the stress associated with being on waiting list. A much smaller proportion noted their experience with incompetent staff (20%) or costs (17%).



Base: Randomly selected respondents  
Multiple mentions accepted. Totals will exceed 100%.

Notable variations among respondents include:

- Parents in Winnipeg's southwest quadrant were **more likely** to cite wait lists as the worst thing (62%). Meanwhile, rural parents were **less likely** to cite wait lists (39%).
- Lower-income parents were **less likely** to mention wait lists (37%). Meanwhile, higher-income parents were **more likely** to cite waiting lists and the stress of not having a space as the worst part of their experience with child care (64%).
- Parents in the northwest quadrant of Winnipeg were **less likely** to cite incompetent staff as the worst part of their child care experience (11%).

Below is a selection of parent responses to this open-ended question:

- *I looked for licensed care, but the real challenge was finding an infant spot for my first child. I wanted a place with a good ratio for staff, cheerful scenery and stimulating activities. In the end what made my decision was the fact that I could only get a spot in one place. We were very fortunate that it was a great facility, but we were so desperate and literally had no other options. The only reason I have not been on a wait list more recently is because we were grandfathered and were able to get the other two kids into the same place.*
- *Once we got into before-and-after, love it, but experience overall with the registration and wait is horrible.*
- *We are currently waiting to have our 6-year-old attend before-and-after school care but are on the wait list and no longer have care for him.*
- *Little space or choice, especially for children with disabilities to get the care they need.*
- *Absolutely no infant spots available in licensed centres or licensed home daycares made returning to work extremely stressful. Wait list does it not appear to mean anything.*
- *The expense for our current facility, and the difficulty finding facilities that can accommodate atypical work schedules.*
- *The list didn't work. I had to call to get our youngest into care and hope a space was available. I only got offered my registry choices later and only because I knew others at those daycares. I'm really angry we have to send our daughter out of our neighbourhood because there aren't any care spots. It would be much healthier for her to walk to and from school.*
- *The wait, some 'off-putting' staff you see. They appear to be observably stressed, and unenthusiastic about their job/role.*
- *No ability to choose a facility that would actually be the best fit for our family, just have to go with wherever there is a space.*
- *I sometimes feel like some of my son's daycare teachers really don't even like their job. The way they treat and talk to the kids sometimes is quite unbelievable. Understanding that sometimes working with that many children, each with different personalities, can be very difficult. Perhaps giving more training on how to deal with difficult children in a proper manner, or extra funding for items for children of different ages. More teachers caring for less students so they don't become overwhelmed.*

### 3.9 Board Governance

This chapter explores the experiences and views of parents who are serving on their child care centre's board of directors.

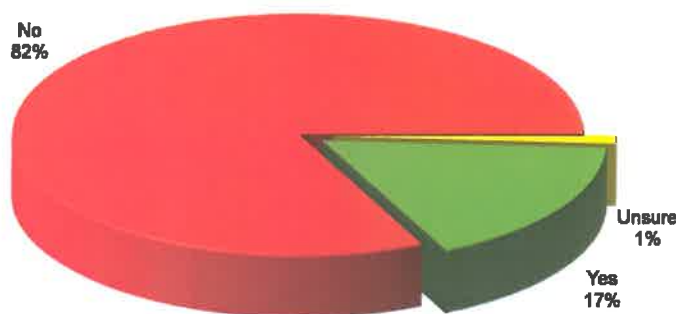
#### 3.9.1 Prevalence of Involvement on Child Care Boards of Directors

Just over one-in-six parents (17%) using centre-based care in on their centre's board of directors.



#### Prevalence of Involvement on Boards

Q26. "Are you on your centre's board of directors?" (n=2,829)



Base: Those who indicated they use centre-based child care in Q1.

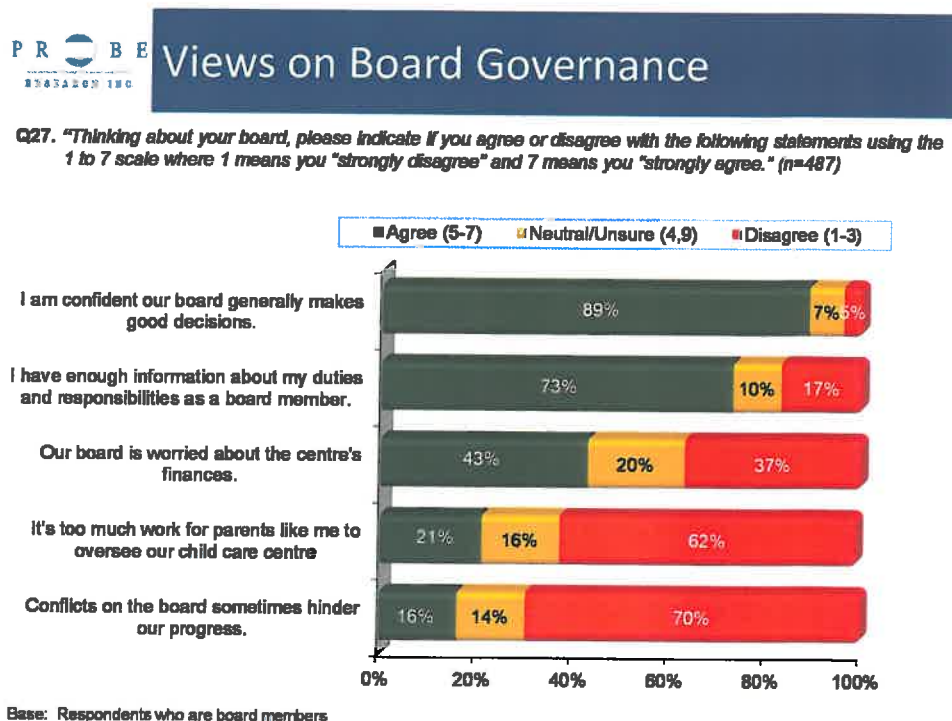
Notable variations among respondents include:

- Parents in rural Manitoba were **more likely** to be on their centre's board (23%), as were parents with children of multiple ages (22%) and higher-income parents (23%).
- Parents in Winnipeg's southeast quadrant were **less likely** to be on their centre's board (12%), as were lower-income parents (9%).

### 3.9.2 Views on Board Governance

Board members were overwhelmingly confident their board made good decisions (89%). Additionally, a strong majority of board members felt they had enough information about their role to make good decisions (73%). Relatively few board members (16%) felt conflicts on their board hindered progress while one-in-five (21%) felt it was too much work for parents to oversee child care centres.

Because of the relatively small sample size, there were no statistically-significant differences among demographic sub-groups.



### 3.9.3 Confidence in Centre Finances

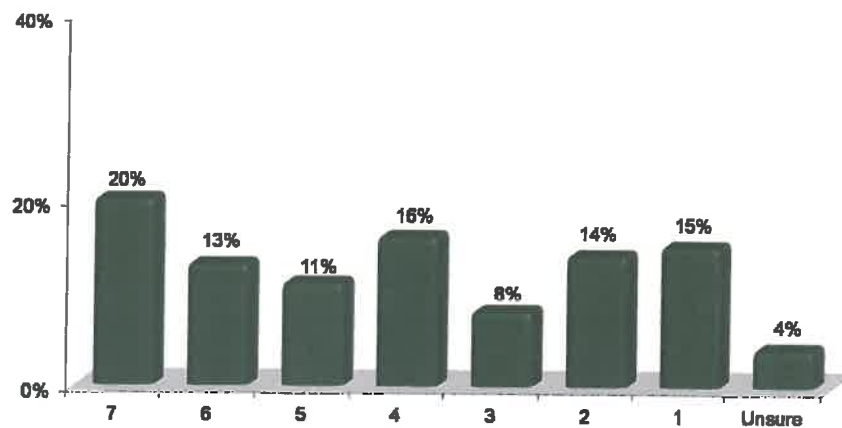
Board members were split when asked about the state of their centre's finances. Just over two-in-five (43%) agreed their board is worried about the centre's finances while just under two-in-five (37%) disagreed. One-in-five (20%) was unsure or neutral on the question.

One-in-five respondents (20%) expressed strong concern about their centre's finances, choosing to strongly agree (a "7" on the one-to-seven scale) with the statement.



#### Confidence in Centre Finances

**Q27e.** "Thinking about your board, please indicate if you agree or disagree with the following statements using the 1 to 7 scale where 1 means you "strongly disagree" and 7 means you "strongly agree...Our board is worried about the centre's finances." (n=488)



Base: Respondents who are board members

Because of the relatively small sample size, there were no statistically-significant differences among demographic sub-groups.