

Analysis of early learning online survey results

NZIER report to Ministry of Education
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Key points

- Respondents thought the New Zealand early learning system was working adequately. The average rating was 3.1 (with 1 being not well and 5 being very well). This rating was consistent across respondents' ethnicity and service type.
- Te Whāriki was perceived as the biggest strength in New Zealand's early learning system. Respondents felt that the current curriculum was of a high standard.
- When asked what could be improved about New Zealand's early learning system the biggest themes were improving the teacher to child ratio and to provide an increase in funding. This was followed by better pay for teachers/educators.
- Improving the teacher to child ratio, providing increased funding and better pay for teachers/educators were also major themes highlighted by respondents when asked about the role that government could play in improving the quality of early learning services.
- Respondents largely thought that role the government could play in supporting all young children to learn and thrive was to increase funding, increase the number of qualified teachers, and increase the coverage of the 20 free hours of ECE.
- Having the Ministry more involved in planning the location of early learning services was the major theme highlighted by respondents when asked about the role that government could have in planning. The Ministry should also be mindful that not too many services are clustered together to ensure early learning services will operate together effectively.

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1. Introduction

This report analyses the results of an online survey on early learning developed by the Ministry of Education. The survey was designed to build engagement in the wider early learning sector and seek feedback from parents. The survey asked the following questions:

- In your view, how well does the New Zealand early learning system work now?
- In your opinion what are the strengths of New Zealand's early learning system?
- What could be improved about our early learning system? Tell us about the most important first.
- What role could the government play in raising the quality of early learning services?
- What role could the government play in supporting all young children to learn and thrive regardless of background?
- What role could government play in planning the type and location of future early learning services?
- Is there anything else you think should be in the ten-year plan?

The results of the survey will inform the 10 Year Strategic Plan for Early Learning Strategic Plan being jointly developed by a Ministerial Advisory Group (MAG), a sector representative Reference Group and the Ministry of Education.

2. Results

2.1. Respondent demographics

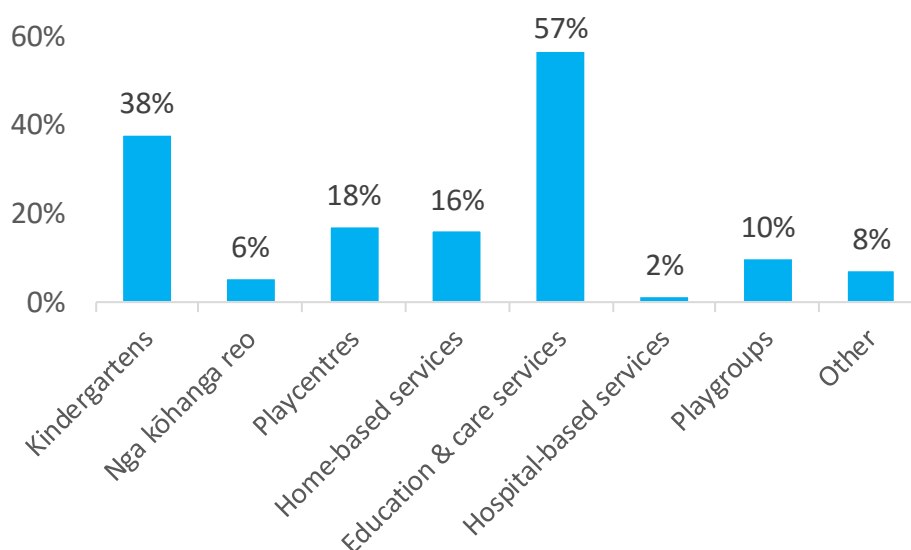
An early childhood survey was available on the Ministry of Education's website Kōrero Mātauranga from 14 June-12 July 2018. The survey received 2,456 responses. Of these responses, 68 percent were teachers/kaiako, 34 percent were parents with children enrolled in early childhood learning, and 15 percent were owners/managers. Nineteen percent of respondents identified as both parents and teachers.

There were 829 parents who responded to the survey. Of these responses, 459 (55 percent) are teachers and 65 (8 percent) are owners/managers.

Figure 1 shows most respondents were associated with either education and care services or kindergartens. Playcentres, home-based services and playgroups make the next largest groups of respondents.

Figure 1 Respondents by type of service

More than one option can be selected



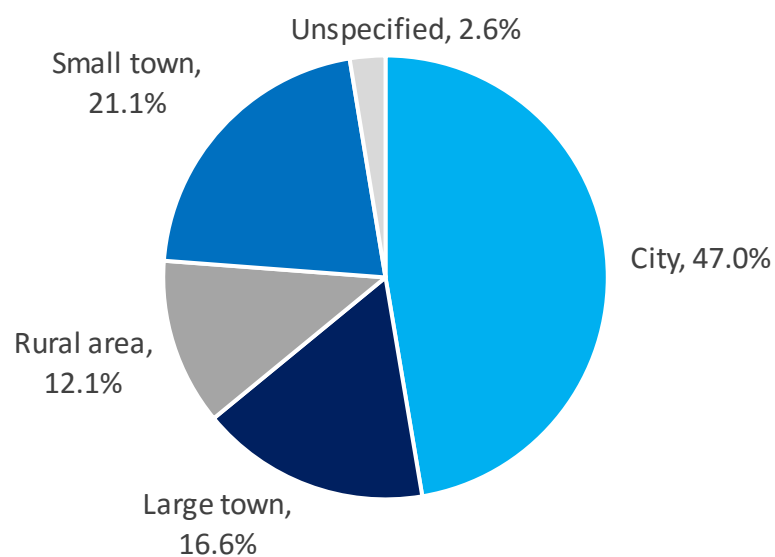
Source: NZIER, MoE

The self-identified ethnicity of respondents was:

- NZ European – 83 percent
- Māori – 16 percent
- Asian – 6 percent
- Pacific – 5 percent.

Figure 2 shows that most respondents live in urban cities, followed by small and then large towns.

Figure 2 Where respondents live



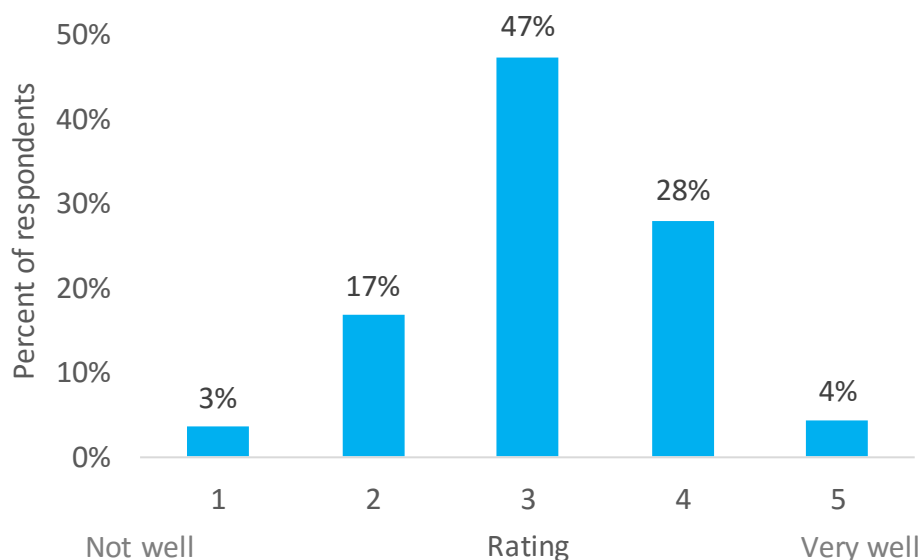
Source: NZIER, MoE

2.2. Question 1: Rating of the New Zealand early learning system

Respondents were asked to rate how well the New Zealand early learning system is working (with 1 being not well and 5 being very well). The average rating across respondents was 3.1. This indicates the majority of respondents considered the New Zealand early learning system was working at least adequately.

Figure 3 shows that the majority of respondents (47 percent) gave a rating of three,¹ while 28 percent gave a rating of four and 17 percent a rating of two.

Figure 3 Distribution of ratings



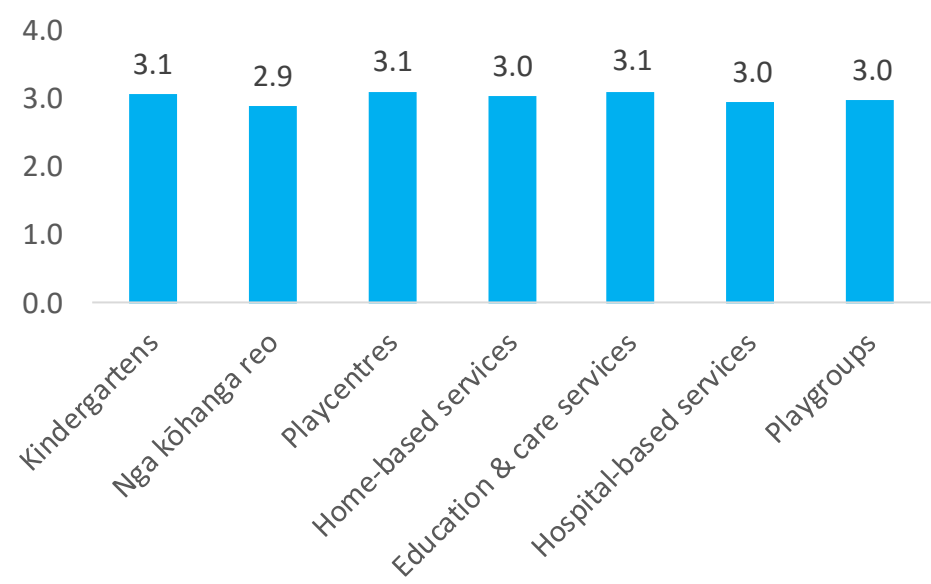
Source: NZIER, MoE

Parents, teachers/kaiako, and owners/managers all provided similar ratings. They provided average ratings of 3.2, 3.1, and 3.2, respectively. Ratings were also consistent across ethnicities, with NZ European, Māori, and Pacific, on average providing similar ratings (average ratings of 3.1, 3.0, and 3.1, respectively).

¹ A rating of three means the New Zealand early learning system is working adequately.

Figure 4 shows that the distribution of ratings is not significantly different across services either. For example, Ngā kōhanga reo has a confidence interval of 2.7 to 3.1 – this means the differences in the mean across the centres are statistically insignificant.

Figure 4 Average rating by service type



Source: NZIER, MoE

2.3. Question 2: What are the strengths of the early learning system?

Table 1 and Figure 5 show the perceived strengths of the current early learning system. The most common theme in the responses related to the strength of **Te Whāriki**. Respondents felt this curriculum was of high quality.

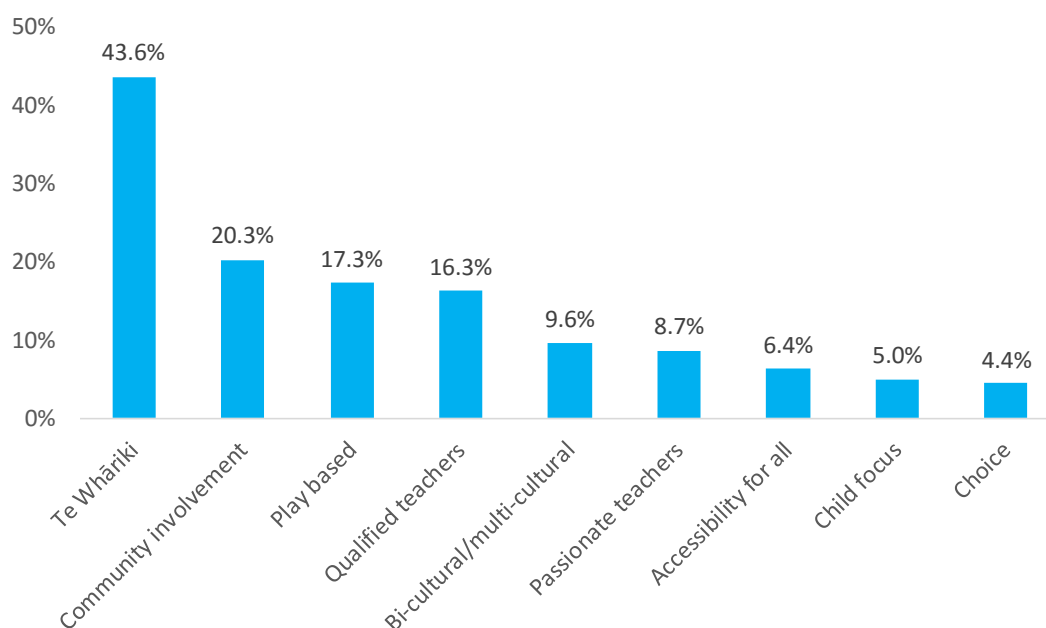
Table 1 Strengths of the early learning system²

Theme	Respondents	Total percent	Children who need extra support to learn
Te Whāriki	1071	43.6%	42.9%
Community involvement	498	20.3%	19.4%
Play based	424	17.3%	16.9%
Qualified teachers	400	16.3%	14.8%
Bi-cultural/multi-cultural	235	9.6%	7.5%
20 Hours ECE	213	8.7%	9.8%
Passionate teachers	156	6.4%	7.7%
Accessibility for all	123	5.0%	5.0%
Child focus	109	4.4%	5.2%
Choice	91	3.7%	3.1%
Total	2456		

Source: NZIER, MoE

² Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Figure 5 Strengths of the early learning system³



Source: NZIER, MoE

Other top themes identified by respondents were:

- **Community involvement:** This was the second most popular theme. Respondents reacted positively to some not-for-profit services building a partnership with the whole learning community to ensure positive outcomes for children, their whānau and their educators.
- **Play based:** This was a strong theme, with respondents pointing to international experiences as evidence for why this approach was best for young children. This theme was sometimes combined with that of allowing children to start primary school a little later than the average age.
- **Qualified teachers:** Of the respondents who specified qualified teachers as a strength, most saw it as a sole strength of the early learning system, but of those who specified a proportion, the most common was 100 percent, followed by 80 percent and 90 percent. Other similar themes relating to teachers as strengths were passionate teachers and the teacher to child ratio.
- **Choice:** Respondents liked the fact that there wasn't a 'one size fits all' approach to early childhood education. They liked that there were a variety of options including centre-based services and home-based services. Respondents also appreciated the various options in educational philosophy. Large corporate services were not viewed favourably by respondents.
- **Bi-cultural/multi-cultural:** Bi-cultural came up more often as a perceived strength than multi-cultural. However, the majority of respondents

³ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

believed that ECE in New Zealand catered for different cultures. This aligned well with the perceived strength of choice in early learning service types.

- **20 Hours ECE:** This was also a strong theme. Respondents viewed the 20 free hours of ECE for 3-year olds and over, favourably, especially since it was seen as increasing whānau engagement and accessibility to ECE. Some respondents highlighted the potential to increase the number of free hours and to extend this policy to younger age groups.
- **Passionate teachers:** Respondents viewed teachers who have a passion for early childhood education as a strength of the early learning system.
- **Accessibility:** This aligns well with the perceived strength of choice provided by early childhood education. Respondents were satisfied with being able to access an early learning service type near their residence.
- **Child focus:** Respondents reacted positively to there being a focus on children's strengths, interests and needs. This strength aligned with the strength of Te Whāriki.

Table 2 shows the breakdown of perceived strengths across current parents of young children, teachers/kaiako, and owners/managers. Teachers/kaiako and owners/managers were more likely to think of Te Whāriki as a strength, relative to parents. Parents were more likely to state play-based learning as one of the strengths of the New Zealand early learning system.

Table 2 Strengths of the early learning system by individual responses⁴

Theme	Parents	Teachers/ kaiako	Owners/ managers	Total percent
Te Whāriki	32.3%	50.6%	56.8%	43.6%
Community involvement	19.1%	19.4%	22.0%	20.3%
Play based	22.2%	18.1%	14.2%	17.3%
Qualified teachers	12.3%	17.3%	15.0%	16.3%
Bi-cultural/multi-cultural	7.7%	10.6%	7.8%	9.6%
20 Hours ECE	10.0%	8.7%	8.4%	8.7%
Passionate teachers	10.9%	7.9%	8.4%	6.4%
Accessibility for all	5.2%	7.6%	5.6%	5.0%
Child focus	4.9%	4.4%	5.6%	4.4%
Choice	5.5%	4.8%	4.5%	3.7%

Source: NZIER, MoE

⁴ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 3 shows a breakdown of these main strengths identified by respondents by ethnicity. Māori were less likely to see qualified early childhood teachers as a strength, compared to those of NZ European ethnicity.

Table 3 Strengths of the early learning system by respondents' ethnicity⁵

Theme	NZ European	Māori	Pacific	Asian	Total percent
Te Whāriki	44.9%	43.8%	34.1%	33.3%	43.6%
Community involvement	20.8%	17.7%	14.4%	13.9%	20.3%
Play based	18.0%	16.4%	11.4%	20.1%	17.3%
Qualified teachers	17.8%	9.2%	12.1%	11.8%	16.3%
Bi-cultural/multi-cultural	9.4%	8.0%	12.1%	6.3%	9.6%
20 Hours ECE	8.6%	8.2%	11.4%	9.7%	8.7%
Passionate teachers	7.0%	7.0%	3.8%	4.2%	6.4%
Accessibility for all	5.1%	5.7%	5.3%	3.5%	5.0%
Child focus	4.1%	4.5%	6.1%	3.5%	4.4%
Choice	3.9%	3.7%	2.3%	1.4%	3.7%

Source: NZIER, MoE

⁵ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 4 shows a breakdown of these main strengths identified by respondents by the location they reside in. Respondents in rural locations felt less strongly that community involvement was a strength, compared to respondents in the city. Additionally, rural respondents were less likely to see play-based curriculum as a strength, relative to city respondents.

Table 4 Strengths of the early learning system by respondents' location⁶

Theme	City	Town	Rural	Total percent
Te Whāriki	46.1%	42.6%	39.2%	43.6%
Community involvement	22.1%	19.8%	15.9%	20.3%
Play based	18.0%	17.1%	14.9%	17.3%
Qualified teachers	16.5%	16.3%	17.2%	16.3%
Bi-cultural/multi-cultural	10.2%	8.9%	8.8%	9.6%
20 Hours ECE	8.2%	9.6%	6.4%	8.7%
Passionate teachers	6.2%	7.0%	5.7%	6.4%
Accessibility for all	5.4%	4.2%	5.4%	5.0%
Child focus	4.0%	5.0%	5.4%	4.4%
Choice	4.1%	3.0%	4.4%	3.7%

Source: NZIER, MoE

⁶ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 5 shows the importance of the main themes as identified by different service types. Respondents in hospital-based services valued the strength of Te Whāriki significantly more than respondents in other service types. There were also significant variations between service types in considering play-based curriculum and qualified teachers as strengths in the current early learning system.

Table 5 Strengths of the early learning system by respondents' service type⁷

Theme	Kindergartens	Ngā kōhanga reo	Playcentres	Home- based services	Education & care services	Hospital- based services	Playgroups	Total
Te Whāriki	45.0%	40.7%	40.0%	40.5%	45.6%	57.1%	34.8%	43.6%
Community involvement	21.7%	18.5%	23.1%	21.2%	21.2%	28.6%	21.9%	20.3%
Play based	19.5%	14.1%	28.7%	15.1%	16.0%	9.5%	21.5%	17.3%
Qualified teachers	21.5%	14.8%	12.7%	15.8%	15.5%	31.0%	15.2%	16.3%
Bi-cultural/multi-cultural	10.8%	8.9%	9.3%	8.4%	10.6%	14.3%	9.0%	9.6%
20 Hours ECE	10.4%	6.7%	6.9%	9.4%	8.1%	4.8%	11.3%	8.7%
Passionate teachers	5.9%	6.7%	5.3%	5.9%	6.5%	7.1%	5.1%	6.4%
Accessibility for all	5.9%	7.4%	5.8%	7.4%	5.2%	7.1%	6.6%	5.0%
Child focus	3.5%	3.7%	4.9%	3.0%	4.5%	0.0%	4.7%	4.4%
Choice	3.5%	3.7%	3.7%	6.2%	2.6%	0.0%	3.5%	3.7%

Source: NZIER, MoE

⁷ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

2.4. Question 3: What could be improved about our early learning system?

Table 6 and Figure 6 show the improvements that could be made to the current early learning system, as identified by the respondents. The most commonly identified improvement was that the Ministry should improve the **teacher to child ratio**. Respondents felt that the quality of education was adversely affected by this, and that teachers were overworked.

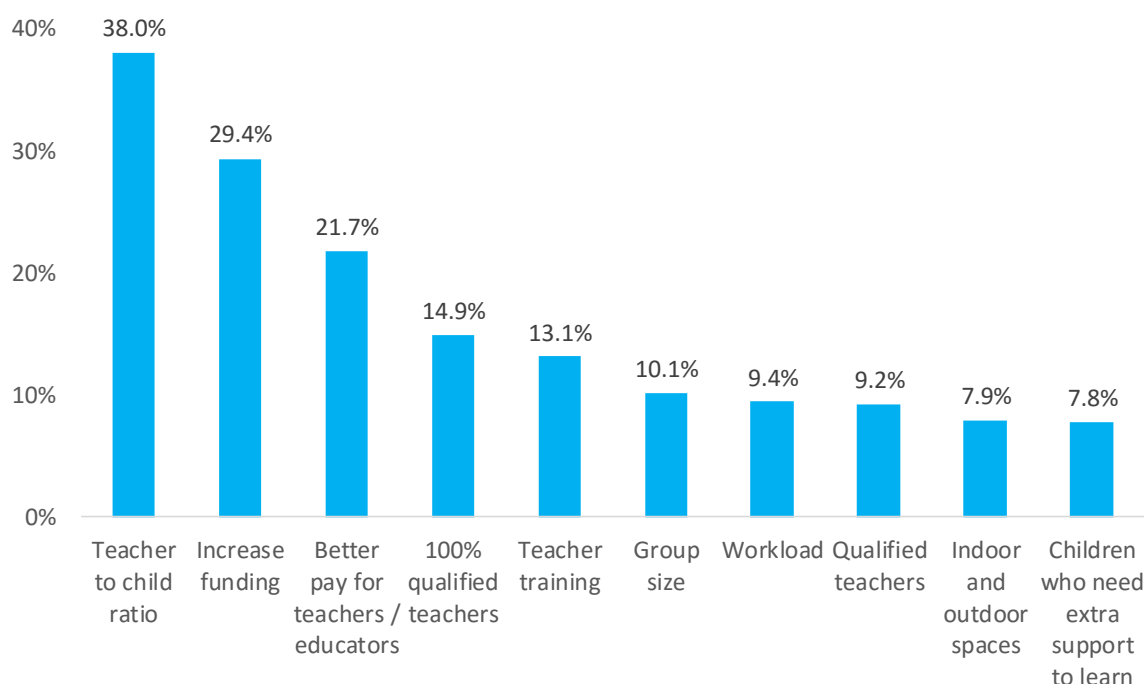
Table 6 Improvements to the early learning system⁸

Theme	Respondents	Total percent	Children who need extra support to learn
Teacher to child ratio	934	38.0%	38.0%
Increase funding	722	29.4%	34.2%
Better pay for teachers / educators	534	21.7%	21.5%
100% qualified teachers	365	14.9%	17.1%
Teacher training	322	13.1%	14.6%
Group size	249	10.1%	11.2%
Workload	231	9.4%	10.5%
Qualified teachers	226	9.2%	8.9%
Indoor and outdoor spaces	195	7.9%	5.9%
Children who need extra support to learn	191	7.8%	11.0%
Total	2456		

Source: NZIER, MoE

⁸ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Figure 6 Improvements to the early learning system⁹



Source: NZIER, MoE

Other improvements identified by respondents were:

- **Increase funding:** This was the second most popular theme. Respondents suggested funding should be increased for not-for-profit centres, children who need extra support to learn, parents who want to stay at home with children for the first two years, teachers, etc.
- **Better pay for teachers/educators:** Respondents felt that teachers/educators were not getting paid enough given their large workload. Additionally, they felt better pay would signal that early childhood educators are equally valued as other teachers/educators.
- **100% qualified teachers:** This was a commonly identified improvement that respondents considered could be made. Many respondents noted that they were unsatisfied with some services which employ unqualified teachers as they are not able to provide a high quality of care. This aligned with other improvements identified such as an increase in funding and better pay, as respondents felt that there should be more funding to attract fully qualified teachers.
- **Teacher training:** Several respondents felt that there should be training for graduate teachers since they have a high theoretical knowledge, but not enough practice. There were also suggestions for all teachers to constantly undertake training, so they can keep up-to-date with research on early childhood education and to provide better quality of education and care for children.

⁹ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

- **Group size:** This was also a commonly identified improvement, which refers to the number of children per classroom. There were concerns about children being in large corporate services, which do not allow enough individual care given by teachers/educators. This theme aligns with the identified improvement of increasing the teacher to child ratio.
- **Workload:** Respondents highlighted the amount of paperwork required and the long hours worked by teachers as a negative issue in the early learning system. This aligns with teachers highlighting they should be better compensated for the large amount of work they do.
- **Qualified teachers:** Similar to the 100% qualified teachers theme, respondents believed that the proportion of qualified to unqualified teachers should range between 80 percent and 100 percent.
- **Indoor and outdoor spaces:** Respondents felt that due to some large corporate services, there was inadequate square meterage of space per child. There were also concerns about children not getting enough time outdoors due to the lack of outdoor space available at some centres.
- **Children who need extra support to learn:** This was also a commonly identified improvement, with respondents suggesting better funding to facilitate this. Several also mentioned early intervention to allow timely support for these children.

Table 7 shows the breakdown of the identified improvements across current parents of young children, teachers/kaiako, and owners/managers. Owners/managers were more likely to highlight the teacher to child ratio, funding levels and teacher pay as improvements they would like to see, relative to parents. Overall, there were significant differences in the relative importance of the improvements identified between owners/managers and parents.

Table 7 Improvements to the early learning system by individual responses¹⁰

Theme	Parents	Teachers/ kaiako	Owners/ managers	Total percent
Teacher to child ratio	31.0%	43.8%	47.9%	38.0%
Increase funding	28.1%	30.9%	45.4%	29.4%
Better pay for teachers / educators	17.6%	24.5%	30.6%	21.7%
100% qualified teachers	9.3%	18.5%	12.8%	14.9%
Teacher training	8.9%	14.0%	18.4%	13.1%
Group size	6.5%	12.5%	12.5%	10.1%
Workload	5.9%	11.1%	13.4%	9.4%
Qualified teachers	7.5%	9.9%	9.7%	9.2%
Indoor and outdoor spaces	5.9%	9.1%	8.4%	7.9%
Children who need extra support to learn	6.0%	8.2%	7.8%	7.8%

Source: NZIER, MoE

¹⁰ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 8 shows a breakdown of these improvements identified by respondents across the different ethnicities. There were significant differences in the importance of these improvements across ethnicities, particularly the teacher to child ratio, funding and time for teacher training and regulating group sizes.

Table 8 Improvements to the early learning system by respondents' ethnicity¹¹

Theme	NZ European	Māori	Pacific	Asian	Total percent
Teacher to child ratio	39.5%	32.1%	28.8%	35.5%	38.0%
Increase funding	30.7%	26.1%	27.3%	21.3%	29.4%
Better pay for teachers / educators	22.5%	20.4%	24.2%	24.8%	21.7%
100% qualified teachers	15.3%	11.2%	12.1%	7.8%	14.9%
Teacher training	13.1%	15.7%	9.8%	10.6%	13.1%
Group size	11.0%	6.7%	5.3%	2.1%	10.1%
Workload	9.5%	8.7%	10.6%	11.3%	9.4%
Qualified teachers	9.4%	10.4%	8.3%	12.8%	9.2%
Indoor and outdoor spaces	8.5%	7.5%	3.8%	5.7%	7.9%
Children who need extra support to learn	8.1%	6.5%	7.6%	5.7%	7.8%

Source: NZIER, MoE

¹¹ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 9 shows a breakdown of improvements identified by respondents by the location they reside in. Respondents in the city were more likely to highlight the teacher to child ratio and teacher workload as improvements to be made, compared to those in rural areas. Respondents residing in towns gave greater importance to ensuring qualified teachers are employed than those based in rural locations.

Table 9 Improvements to the early learning system by respondents' location¹²

Theme	City	Town	Rural	Total percent
Teacher to child ratio	38.4%	39.6%	33.8%	38.0%
Increase funding	30.4%	30.3%	26.0%	29.4%
Better pay for teachers / educators	22.4%	22.4%	18.9%	21.7%
100% qualified teachers	15.7%	14.5%	14.2%	14.9%
Teacher training	14.1%	12.3%	11.8%	13.1%
Group size	11.3%	9.1%	9.5%	10.1%
Workload	10.4%	9.1%	7.4%	9.4%
Qualified teachers	8.8%	10.8%	6.4%	9.2%
Indoor and outdoor spaces	8.6%	8.0%	5.4%	7.9%
Children who need extra support to learn	7.4%	9.1%	6.1%	7.8%

Source: NZIER, MoE

¹² Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 10 shows a breakdown of improvements identified by respondents across different service types. Education and care services were more likely to identify improvements to the teacher to child ratio and better pay for teachers/educators. Hospital-based services identified the need for 100 percent qualified teachers and teacher training with greater emphasis than other service types.

Table 10 Improvements to the early learning system by respondents' service type¹³

Theme	Kindergartens	Ngā kōhanga reo	Play- centres	Home- based services	Education & care services	Hospital -based services	Play groups	Total
Teacher to child ratio	32.5%	25.5%	27.7%	33.3%	42.9%	34.1%	28.5%	38.0%
Increase funding	28.9%	21.9%	25.3%	27.4%	31.1%	31.7%	24.5%	29.4%
Better pay for teachers/educators	15.8%	23.4%	13.5%	16.4%	25.9%	22.0%	13.0%	21.7%
100% qualified teachers	22.7%	15.3%	12.1%	12.9%	13.3%	26.8%	10.7%	14.9%
Teacher training	14.6%	22.6%	12.1%	13.9%	15.0%	31.7%	11.5%	13.1%
Group size	10.3%	5.8%	9.1%	11.9%	10.3%	14.6%	7.5%	10.1%
Workload	7.1%	5.1%	4.2%	7.7%	10.6%	2.4%	5.5%	9.4%
Qualified teachers	9.8%	9.5%	8.1%	10.0%	10.2%	14.6%	7.1%	9.2%
Indoor and outdoor spaces	9.3%	8.0%	10.7%	9.0%	8.5%	9.8%	7.5%	7.9%
Children who need extra support to learn	9.7%	8.8%	5.8%	7.2%	7.7%	9.8%	8.3%	7.8%

Source: NZIER, MoE

¹³ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

2.5. Question 4: What role could the government play in raising the quality of early learning services?

Table 11 shows the main initiatives respondents gave as ways the government could raise the quality of early learning services. Respondents suggested policy and regulation changes were important steps to raising quality in early learning services. Some respondents referred to their answer in the previous question, which aligns with the most common theme identified here being an **increase in funding**.

Even though some respondents referred to their answer in the previous question, the statistics for any overlapping themes between this question and the previous question are different. This is due to respondents having different responses for questions 3 and 4. The statistics for this question and reported in Table 11 are determined from the responses for this question alone.

Table 11 Government's role in raising the quality of early learning services¹⁴

Theme	Respondents	Total percent	Children who need extra support to learn
Increase funding	1143	46.5%	49.2%
Teacher to child ratio	592	24.3%	26.2%
Better pay for teachers / educators	587	24.0%	20.9%
Training / Professional development for teachers	346	14.1%	16.5%
100% qualified teachers	311	12.8%	15.6%
More ERO visits	225	9.2%	8.2%
Qualified teachers	204	8.4%	7.4%
Group sizes	147	5.8%	5.9%
Conditions of teaching environment	142	5.5%	4.6%
Children who need extra support to learn	136	5.3%	9.1%
Total	2456		

Source: NZIER, MoE

The overlapping themes between the two questions have similar descriptions so have been excluded from the list below. The other non-overlapping top themes identified by respondents are:

¹⁴ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

- **ERO visits:** This was a commonly identified theme. Respondents noted that there needed to be more frequent visits by the Education Review Office (ERO), particularly for for-profit services, to ensure they are providing quality care (rather than focusing on profits). Respondents also noted that better guidelines needed to be established by the ERO to ensure there is consistency in the quality of care and education across all service types.
- **Conditions of the teaching environment:** Respondents felt that teachers were not getting paid enough given their large workload. Additionally, they felt better pay would signal that early childhood educators are equally valued as other educators. There were strong concerns about bullying of teachers by management in the work place, i.e. requiring teachers to work long hours in a stressful environment. The stressful environment was identified as being due to the low teacher to child ratio and large group sizes.

Table 12 shows the breakdown of these main themes across current parents of young children, teachers/kaiako, and owners/managers. Owners/managers were more likely than parents to note that the government should increase funding for early childhood education and improve the teacher to child ratio.

Table 12 Government's role in raising the quality of early learning services by individual responses¹⁵

Theme	Parents	Teachers/ kaiako	Owners/ managers	Total percent
Increase funding	45.6%	48.5%	60.4%	46.5%
Teacher to child ratio	22.4%	26.0%	29.2%	24.3%
Better pay for teachers / educators	21.2%	27.1%	25.3%	24.0%
Training / Professional development for teachers	11.5%	15.8%	19.2%	14.1%
100% qualified teachers	8.6%	15.8%	9.5%	12.8%
More ERO visits	7.0%	9.4%	6.7%	9.2%
Qualified teachers	7.0%	8.7%	8.1%	8.4%
Group sizes	3.6%	6.9%	7.5%	5.8%
Conditions of teaching environment	4.6%	6.3%	3.3%	5.5%
Children who need extra support to learn	3.9%	5.4%	5.3%	5.3%

Source: NZIER, MoE

¹⁵ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 13 shows a breakdown of these main themes identified by respondents by ethnicity. Overall there is consistency across the ethnicities in the relative importance of these themes. NZ Europeans were more likely to believe that the government should improve the teacher to child ratio, relative to respondents of Pacific descent.

Table 13 Government's role in raising the quality of early learning services by respondents' ethnicity¹⁶

Theme	NZ European	Māori	Pacific	Asian	Total percent
Increase funding	48.5%	46.3%	47.0%	41.8%	46.5%
Teacher to child ratio	25.5%	23.4%	15.2%	18.4%	24.3%
Better pay for teachers / educators	24.2%	23.4%	24.2%	22.7%	24.0%
Training / Professional development for teachers	13.7%	14.7%	11.4%	15.6%	14.1%
100% qualified teachers	13.5%	11.9%	12.9%	5.0%	12.8%
More ERO visits	8.8%	9.7%	9.1%	12.8%	9.2%
Qualified teachers	8.3%	8.0%	6.8%	9.9%	8.4%
Group sizes	6.4%	4.0%	2.3%	1.4%	5.8%
Conditions of teaching environment	5.7%	6.0%	3.0%	5.7%	5.5%
Children who need extra support to learn	5.2%	4.2%	5.3%	5.0%	5.3%

Source: NZIER, MoE

¹⁶ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 14 shows a breakdown of these themes identified by respondents by the location they reside in. Respondents living in small or large towns were more likely to identify increasing government funding as a higher priority than respondents living in rural areas. Additionally, respondents residing in cities were more likely to highlight better pay for teachers/educators as an improvement the Government could make, relative to rural residents.

Table 14 Government's role in raising the quality of early learning services by respondents' location¹⁷

Theme	City	Town	Rural	Total percent
Increase funding	46.2%	49.9%	43.6%	46.5%
Teacher to child ratio	24.3%	24.4%	23.3%	24.3%
Better pay for teachers / educators	25.0%	23.3%	20.3%	24.0%
Training / Professional development for teachers	15.0%	13.7%	12.8%	14.1%
100% qualified teachers	12.9%	13.6%	10.1%	12.8%
More ERO visits	9.5%	8.9%	7.8%	9.2%
Qualified teachers	7.6%	9.0%	8.4%	8.4%
Group sizes	7.5%	4.9%	2.4%	5.8%
Conditions of teaching environment	7.0%	4.3%	3.4%	5.5%
Children who need extra support to learn	5.4%	5.4%	4.1%	5.3%

Source: NZIER, MoE

¹⁷ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 15 shows a breakdown of the main steps government can take to raise quality as identified by respondents across the different service types. Overall there were significant differences in the relative importance of these themes for the different service types. In particular, respondents who are associated with children in hospital-based childcare centres were more likely to highlight more ERO visits, relative to respondents with children in education and care services.

Table 15 Government's role in raising quality of early learning services by respondents' service type¹⁸

Theme	Kindergartens	Ngā kōhanga reo	Playcentres	Home- based services	Education & care services	Hospital- based services	Playgroups	Total
Increase funding	47.7%	37.2%	41.2%	42.3%	47.8%	43.9%	40.3%	46.5%
Teacher to child ratio	20.5%	17.5%	22.3%	20.1%	27.9%	29.3%	23.7%	24.3%
Better pay for teachers / educators	19.9%	14.6%	14.4%	19.4%	26.7%	19.5%	14.2%	24.0%
Training / Professional development for teachers	15.6%	13.9%	15.1%	14.4%	15.4%	24.4%	13.4%	14.1%
100% qualified teachers	19.7%	14.6%	8.1%	10.2%	10.7%	19.5%	9.5%	12.8%
More ERO visits	11.3%	13.1%	12.1%	11.9%	10.3%	26.8%	14.2%	9.2%
Qualified teachers	8.7%	8.0%	9.5%	6.7%	9.1%	14.6%	5.5%	8.4%
Group sizes	4.6%	2.2%	4.9%	5.7%	6.4%	9.8%	4.7%	5.8%
Conditions of teaching environment	6.2%	10.2%	7.4%	4.5%	6.2%	4.9%	4.7%	5.5%
Children who need extra support to learn	7.1%	6.6%	5.3%	5.0%	5.2%	9.8%	6.3%	5.3%

Source: NZIER, MoE

¹⁸ Percentages do not sum to 100 as more than one theme can be attributed to a respondent

2.6. Question 5: Government's role in supporting all young children to learn and thrive

Table 16 shows the initiatives identified by respondents which the government could undertake in supporting all young children to learn and thrive. The most common theme was that **increased funding** would help young children to learn and thrive.

Table 16 Government's role in supporting children¹⁹

Theme	Respondents	Total percent	Children who need extra support to learn
Increase funding	399	16.2%	17.7%
Qualified teacher	215	8.8%	8.1%
20 Hours ECE	215	8.8%	8.8%
Teacher to child ratio	211	8.6%	9.4%
Accessibility for all	190	7.7%	7.1%
Children who need extra support to learn	146	5.9%	6.7%
Support for family	130	5.3%	3.8%
Parenting education	127	5.2%	5.4%
Professional development	124	5.0%	5.4%
Free ECE	106	4.3%	4.8%
Total	2456		

Source: NZIER, MoE

Other top themes identified by respondents were:

- **Qualified teacher:** that early learning services should have more qualified teachers. The most common response was 100 percent qualified teachers, followed by 80 percent and 90 percent.
- **20 Hours ECE:** Many respondents noted increasing the 20 free hours of ECE for 3-year olds and over was a way to support young children learn, especially since it has increased whānau engagement and accessibility to early learning services.
- **Teacher to child ratio:** Many felt that the quality of education was affected by this ratio being too low, and teachers felt overworked.

¹⁹ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

- **Accessibility for all:** Many respondents felt that there should be access to early learning services for children of all backgrounds. This related to the need for low income families to be able to afford more hours of early learning services.
- **Children who need extra support to learn:** Many respondents noted these children need more support and resources.
- **Support for family:** Many respondents highlighted the need for improved support structures and information for new parents. Some respondents suggested parental presence at early learning services was important.
- **Parenting education:** Many respondents noted the importance of providing new parents with education and training on child development.
- **Professional development:** Many respondents felt more professional development for teachers/educators was required, especially to keep teachers up-to-date with modern research and practices. In addition, courses to improve teachers' Te Reo skills was highlighted as an important initiative.
- **Free ECE:** Many respondents noted that early childhood education should be free like primary education.

Table 17 shows the breakdown of initiatives identified across current parents of young children, teachers/kaiako, and owners/managers. Owners/managers were more likely than parents or teachers/kaiako to think that increased funding is required. Teachers/kaiako were more likely to think that qualified teachers were important, relative to the rest of respondents.

Table 17 Government's role in supporting children by individual responses²⁰

Theme	Parents	Teachers/ kaiako	Owners/ managers	Total percent
Increase funding	14.7%	17.1%	22.0%	16.2%
Qualified teacher	6.6%	10.2%	5.0%	8.8%
20 Hours ECE	10.0%	8.4%	12.0%	8.8%
Teacher to child ratio	7.7%	10.1%	8.9%	8.6%
Accessibility for all	7.5%	6.7%	10.0%	7.7%
Children who need extra support to learn	3.9%	6.6%	6.1%	5.9%
Support for family	4.5%	5.3%	2.8%	5.3%
Parenting education	5.5%	4.9%	5.6%	5.2%
Professional development	5.9%	4.6%	3.1%	5.0%
Free ECE	2.5%	5.7%	6.4%	4.3%

Source: NZIER, MoE

²⁰ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 18 shows a breakdown of these main themes identified by respondents by different ethnicities. Increased funding was seen as significantly more important to Māori and Pacific respondents. Meanwhile, qualified teachers, 20 free hours of ECE and the teacher to child ratio were considered more important to NZ European respondents.

Table 18 Government's role in supporting children by respondents' ethnicity²¹

Theme	NZ European	Māori	Pacific	Asian	Total percent
Increase funding	16.4%	19.7%	20.5%	20.1%	16.2%
Qualified teacher	9.1%	7.5%	3.0%	7.6%	8.8%
20 Hours ECE	9.1%	8.0%	6.8%	9.7%	8.8%
Teacher to child ratio	9.2%	8.7%	3.8%	4.2%	8.6%
Accessibility for all	7.7%	8.0%	9.1%	7.6%	7.7%
Children who need extra support to learn	5.7%	6.0%	6.1%	7.6%	5.9%
Support for family	5.5%	3.5%	5.3%	2.8%	5.3%
Parenting education	5.2%	4.2%	6.1%	4.9%	5.2%
Professional development	4.8%	5.5%	3.8%	6.3%	5.0%
Free ECE	4.4%	4.5%	6.1%	4.9%	4.3%

Source: NZIER, MoE

²¹ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 19 shows a breakdown of these main themes identified by respondents by different locations. Rural respondents were more likely to see increased funding and an extension to 20 free hours of ECE as important initiatives the Government could take to improve the early learning system.

Table 19 Government's role in supporting children by respondents' location²²

Theme	City	Town	Rural	Total percent
Increase funding	14.6%	17.7%	19.9%	16.2%
Qualified teacher	8.9%	9.3%	7.8%	8.8%
20 Hours ECE	7.7%	9.7%	10.8%	8.8%
Teacher to child ratio	8.9%	9.2%	6.8%	8.6%
Accessibility for all	8.5%	6.6%	9.5%	7.7%
Children who need extra support to learn	5.6%	6.8%	4.7%	5.9%
Support for family	5.4%	5.0%	5.7%	5.3%
Parenting education	6.5%	3.8%	5.1%	5.2%
Professional development	5.5%	5.4%	2.4%	5.0%
Free ECE	4.4%	4.3%	4.4%	4.3%

Source: NZIER, MoE

²² Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 20 shows a breakdown of these main themes identified by respondents by service. There were significant differences across service types when it came to initiatives identified such as funding, qualified teacher, and the teacher to child ratio.

Table 20 Government's role in supporting children by respondents' service type²³

Theme	Kindergartens	Ngā kōhanga reo	Playcentres	Home- based services	Education & care services	Hospital- based services	Playgroups	Total
Increase funding	15.7%	14.1%	12.5%	15.8%	16.8%	14.3%	19.1%	16.2%
Qualified teacher	12.3%	8.1%	5.8%	7.7%	8.6%	11.9%	3.9%	8.8%
20 Hours ECE	6.7%	3.7%	4.6%	7.9%	10.0%	2.4%	7.8%	8.8%
Teacher to child ratio	7.2%	3.7%	7.4%	5.7%	9.7%	4.8%	4.3%	8.6%
Accessibility for all	7.9%	11.1%	6.7%	7.9%	8.4%	16.7%	7.4%	7.7%
Children who need extra support to learn	6.5%	8.1%	5.3%	4.4%	5.9%	4.8%	5.5%	5.9%
Support for family	5.3%	4.4%	6.7%	4.9%	5.4%	9.5%	6.3%	5.3%
Parenting education	4.6%	4.4%	10.0%	4.9%	4.7%	0.0%	5.5%	5.2%
Professional development	4.9%	3.0%	3.2%	4.4%	5.9%	11.9%	3.9%	5.0%
Free ECE	4.8%	5.9%	6.3%	5.7%	4.8%	7.1%	5.9%	4.3%

Source: NZIER, MoE

²³ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

2.7. Question 6: Government's role in planning

Table 21 shows the activities respondents considered the government could undertake when planning the type and location of future early learning services. The biggest theme in this response was that the Ministry should be involved in **location planning** and making sure not too many services were clustered together. Respondents felt that in certain areas there were several services competing against each other, whereas in some low socio-economic areas there were not enough services.

Table 21 Government's role in planning²⁴

Theme	Respondents	Total percent	Children who need extra support to learn
Location planning	675	32.1%	29.5%
Smaller services/classes	192	9.1%	8.7%
Not for profit	174	8.3%	9.2%
More consultation	138	6.6%	6.1%
Environment of services	114	5.4%	4.2%
Outside and nature	111	5.3%	4.2%
Increase funding	92	4.4%	5.4%
Relationship with primary	86	4.1%	5.9%
Less licences issued	80	3.8%	3.1%
Accessibility for all	63	3.0%	2.8%
Total	2456		

Source: NZIER, MoE

Other themes commonly identified by respondents were:

- **Smaller services/classes:** most respondents felt that children learnt better in smaller classes.
- **Not-for-profit:** many respondents felt that children learnt best in not-for-profit services.
- **More consultation:** many respondents felt the Ministry should talk more with and visit those working in the sector to get a better understanding of the early learning system.
- **Environment of services:** respondents highlighted the need for an improvement in the environment, including better facilities, more space per child, less noise.

²⁴ Percentages do not sum to 100 as more than one theme can be attributed to a respondent

- **Outside and nature:** respondents noted more services should provide experiences with nature and the outdoors. The development of early learning services amongst forests was noted as an important initiative.
- **Increased funding:** delving into the detail of the responses, this related to funding of their preferred type of service, or increased funding for specific socio-economic groups.
- **Relationship with primary:** respondents felt there should be a better transition from early learning services to primary school. Suggestions included pushing back the start date of primary school attendance, locating early learning services on school grounds, and building relationships between early learning services and local primary schools.
- **Less licences issued:** some respondents thought there were too many early learning services, and that excessive competition was harmful for the sector.
- **Accessibility for all:** respondents felt there should be access to early learning services for children of all backgrounds. This meant ensuring low-income families could afford more hours of early learning services.

Table 22 shows the breakdown of the Government's role in planning of early learning services across current parents of young children, teachers/kaiako, and owners/managers. Owners/managers were more likely to think the Ministry should be more involved in location planning, relative to parents. Parents were less likely to identify smaller centres or class size as important, relative to owners/managers and teachers/kaiako.

Table 22 Government's role in planning by individual responses²⁵

Theme	Parents	Teachers/ kaiako	Owners/ managers	Total percent
Location planning	24.3%	30.6%	46.3%	32.1%
Smaller services/classes	8.6%	10.5%	12.8%	9.1%
Not for profit	6.0%	9.5%	7.0%	8.3%
More consultation	6.3%	6.9%	5.5%	6.6%
Environment of services	5.6%	5.9%	3.4%	5.4%
Outside and nature	5.9%	5.9%	2.4%	5.3%
Increase funding	5.7%	3.9%	3.0%	4.4%
Relationship with primary	3.2%	4.5%	2.4%	4.1%
Less licences issued	6.0%	3.4%	3.0%	3.8%
Accessibility for all	3.8%	4.1%	8.8%	3.0%

Source: NZIER, MoE

²⁵ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 23 shows a breakdown of these main themes identified by respondents across different ethnicities. There were significant differences across the ethnicities in the importance of the smaller services/classes, not-for-profit, environment of services, outside and nature, and accessibility for all.

Table 23 Government's role in planning by respondents' ethnicity²⁶

Theme	NZ European	Māori	Pacific	Asian	Total percent
Location planning	32.3%	30.7%	31.7%	39.0%	32.1%
Smaller services/classes	9.6%	6.8%	4.2%	3.4%	9.1%
Not for profit	8.5%	7.1%	5.0%	4.2%	8.3%
More consultation	6.4%	8.0%	8.3%	5.9%	6.6%
Environment of services	5.8%	4.0%	0.0%	1.7%	5.4%
Outside and nature	5.4%	4.8%	0.0%	6.8%	5.3%
Increase funding	4.3%	4.0%	4.2%	2.5%	4.4%
Relationship with primary	4.5%	4.8%	5.8%	3.4%	4.1%
Less licences issued	4.1%	4.0%	3.3%	3.4%	3.8%
Accessibility for all	2.9%	3.7%	6.7%	5.9%	3.0%

Source: NZIER, MoE

²⁶ Percentages do not sum to 100 as more than one theme can be attributed to a respondent

Table 24 shows a breakdown of these main themes identified by respondents by location. Overall, there does not seem to be a major difference in the importance of these themes across respondents in different locations. There were minor differences in the not-for-profit and environment of services themes across the different locations.

Table 24 Government's role in planning by respondents' location²⁷

Theme	City	Town	Rural	Total percent
Location planning	30.6%	35.0%	29.4%	32.1%
Smaller services/classes	9.5%	9.1%	9.4%	9.1%
Not for profit	9.7%	7.1%	7.1%	8.3%
More consultation	5.6%	7.3%	7.5%	6.6%
Environment of services	6.2%	4.9%	4.3%	5.4%
Outside and nature	4.9%	6.1%	4.3%	5.3%
Increase funding	3.9%	5.2%	4.3%	4.4%
Relationship with primary	3.8%	4.2%	5.5%	4.1%
Less licences issued	4.1%	3.3%	5.1%	3.8%
Accessibility for all	3.6%	2.5%	2.7%	3.0%

Source: NZIER, MoE

²⁷ Percentages do not sum to 100 as more than one theme can be attributed to a respondent

Table 25 shows a breakdown of the importance of these main themes by different service types. There are significant differences across the centre types in the importance of location planning, smaller services/classes, not-for-profit, more consultation and environment of services.

Table 25 Government's role in planning by respondents' service type²⁸

Theme	Kindergartens	Ngā kōhanga reo	Playcentres	Home- based services	Education & care services	Hospital- based services	Playgroups	Total
Increase funding	30.1%	28.9%	26.6%	32.0%	32.8%	40.0%	24.2%	32.1%
Qualified teacher	7.4%	8.3%	7.3%	7.9%	10.3%	10.0%	5.8%	9.1%
20 Hours ECE	10.4%	5.8%	9.8%	6.8%	6.9%	10.0%	7.2%	8.3%
Teacher to child ratio	8.1%	9.9%	6.5%	7.9%	6.3%	10.0%	11.2%	6.6%
Accessibility for all	5.3%	2.5%	6.8%	7.4%	5.9%	7.5%	3.6%	5.4%
Children who need extra support to learn	5.9%	4.1%	6.2%	3.7%	5.5%	2.5%	3.6%	5.3%
Support for family	4.1%	4.1%	5.4%	4.0%	4.3%	0.0%	2.7%	4.4%
Parenting education	4.5%	5.8%	3.8%	4.5%	4.0%	2.5%	3.6%	4.1%
Professional development	3.5%	3.3%	3.0%	4.2%	3.7%	5.0%	3.6%	3.8%
Free ECE	3.6%	3.3%	3.3%	1.4%	3.1%	0.0%	4.0%	3.0%

Source: NZIER, MoE

²⁸ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

2.8. Question 7: What else should be in the ten-year plan

Table 26 shows what else respondents considered should be in the ten-year plan. The biggest theme in the responses was that the Ministry should **increase funding**, to either provide better and more diverse services, for home-based services, more government run services, increased funding for a better teaching environment, better pay, etc.

Table 26 Inclusions in the ten-year plan²⁹

Theme	Respondents	Total percent	Children who need extra support to learn
Increase funding	217	8.9%	10.8%
Better pay for teacher / educators	175	7.1%	8.5%
More qualified teachers	160	6.5%	6.0%
Teacher to child ratio	150	6.1%	7.3%
Relationship with primary	148	6.0%	5.2%
Better working conditions	109	4.4%	5.6%
Professional development	99	4.0%	4.8%
Quality over quantity	91	3.7%	4.8%
More support for parents	67	2.9%	3.5%
Comparable pay	67	2.7%	3.1%
Total	2456		

Source: NZIER, MoE

Other top themes identified by respondents were:

- **Better pay for teacher/educators:** most respondents felt teachers and educators were significantly under paid, especially compared to teachers in primary education.
- **More qualified teachers:** respondents felt that early childhood education should have more qualified teachers. The most common response was 100 percent qualified teachers, followed by 80 percent and 90 percent.
- **Teacher to child ratio:** respondents felt that the quality of education was affected by this ratio being too low, and teachers felt overworked.
- **Relationship with primary:** respondents felt that there should be a better transition from ECE to primary school. Suggestions included pushing back the start date of primary school, locating early learning services on school

²⁹ Percentages do not sum to 100 as more than one theme can be attributed to a respondent

grounds, and building relationships between early learning services and local primary schools.

- **Better working conditions:** this includes raising the status of early learning services, providing more sick leave, staffrooms, reducing workload, meetings etc.
- **Professional development:** respondents wanted more professional development for teachers, especially to keep teachers/educators up-to-date with modern research and practices. In addition, courses to improve teachers' Te Reo skills were highlighted as important initiatives the Government could take.
- **Quality over quantity:** most comments on this theme were that respondents believed there was a trend to increase the quantity of early learning services provided. These respondents felt it was more important to focus on the quality of services provided.
- **More support for parents:** respondents felt improving support structures for new parents was important. Some respondents suggested parental presence at early learning services was important.
- **Comparable pay:** respondents felt there should be level and consistent pay within the sector and with primary school teachers.

Table 27 shows the breakdown of responses across current parents of young children, teachers/kaiako, and owners/managers. The main difference was owners/managers were more likely to consider more funding as being required in the plan, while teachers/kaiako were more likely to consider teachers' pay to be of greater importance.

Table 27 Inclusions in the ten-year plan by individual responses³⁰

Theme	Parents	Teachers/ kaiako	Owners/ managers	Total percent
Increase funding	8.6%	9.2%	11.4%	8.9%
Better pay for teacher / educators	6.2%	8.5%	7.0%	7.1%
More qualified teachers	6.4%	8.0%	6.4%	6.5%
Teacher to child ratio	5.7%	6.4%	5.0%	6.1%
Relationship with primary	7.2%	6.7%	7.2%	6.0%
Better working conditions	3.9%	5.5%	4.7%	4.4%
Professional development	4.3%	3.5%	2.8%	4.0%
Quality over quantity	1.9%	4.4%	5.3%	3.7%
More support for parents	2.4%	3.1%	3.6%	2.9%
Comparable pay	3.3%	2.6%	2.2%	2.7%

Source: NZIER, MoE

³⁰ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 28 shows a breakdown of the main themes identified by respondents by different ethnicities. Pacific were less likely to see professional development as important relative to other ethnicities. However, they placed greater importance on quality over quantity of services provided, compared with other ethnicities. There were also differences in the importance of the number of qualified teachers and teacher to child ratio across the ethnic groups.

Table 28 Inclusions in the ten-year plan by respondents' ethnicity³¹

Theme	NZ European	Māori	Pacific	Asian	Total percent
Increase funding	9.0%	10.0%	9.1%	11.1%	8.9%
Better pay for teacher / educators	6.9%	8.0%	7.6%	12.5%	7.1%
More qualified teachers	6.7%	6.2%	7.6%	8.3%	6.5%
Teacher to child ratio	6.2%	6.0%	8.3%	3.5%	6.1%
Relationship with primary	6.2%	7.0%	4.5%	2.8%	6.0%
Better working conditions	4.6%	3.7%	3.8%	6.3%	4.4%
Professional development	3.8%	4.0%	1.5%	2.8%	4.0%
Quality over quantity	3.8%	4.5%	7.6%	6.9%	3.7%
More support for parents	3.1%	3.0%	2.3%	1.4%	2.9%
Comparable pay	2.7%	3.2%	2.3%	1.4%	2.7%

Source: NZIER, MoE

³¹ Percentages do not sum to 100 as more than one theme can be attributed to a respondent

Table 29 shows a breakdown of the main themes identified by respondents by location. There were differences across locations in the importance of the number of qualified teachers, the number of early learning centres, and teacher ratios. Respondents in rural areas were more likely to highlight the lack of early learning centres in close proximity to them.

Table 29 Inclusions in the ten-year plan by respondents' location³²

Theme	City	Town	Rural	Total percent
Increase funding	8.6%	9.2%	11.4%	8.9%
Better pay for teacher / educators	6.2%	8.5%	7.0%	7.1%
More qualified teachers	6.4%	8.0%	6.4%	6.5%
Teacher to child ratio	5.7%	6.4%	5.0%	6.1%
Relationship with primary	7.2%	6.7%	7.2%	6.0%
Better working conditions	3.9%	5.5%	4.7%	4.4%
Professional development	4.3%	3.5%	2.8%	4.0%
Quality over quantity	1.9%	4.4%	5.3%	3.7%
More support for parents	2.4%	3.1%	3.6%	2.9%
Comparable pay	3.3%	2.6%	2.2%	2.7%

Source: NZIER, MoE

³² Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Table 30 shows a breakdown of the importance of the main themes across different services types. Significant differences across centre types were identified when it came to higher teacher pay, teacher to child ratio and primary school related themes. These primary school themes encompass the transition from early learning services to primary school, the location of primary schools and the starting age of primary schools. Hospital-based services were more likely to see these as important, relative to Ngā kōhanga reo.

Table 30 Inclusions in the ten-year plan by respondents' service type³³

Theme	Kindergartens	Ngā kōhanga reo	Playcentres	Home-based services	Education & care services	Hospital-based services	Playgroups	Total
Increase funding	8.8%	9.6%	8.1%	9.1%	9.4%	4.8%	6.6%	8.9%
Better pay for teacher / educators	4.1%	5.2%	3.2%	6.7%	8.1%	4.8%	3.9%	7.1%
More qualified teachers	7.6%	5.2%	4.4%	4.4%	7.0%	4.8%	3.9%	6.5%
Teacher to child ratio	6.0%	9.6%	6.5%	7.4%	5.5%	11.9%	9.0%	6.1%
Relationship with primary	6.2%	2.2%	5.1%	4.9%	6.6%	11.9%	5.1%	6.0%
Better working conditions	5.7%	2.2%	5.3%	4.7%	4.4%	4.8%	3.9%	4.4%
Professional development	2.8%	5.2%	3.5%	3.0%	4.7%	0.0%	3.1%	4.0%
Quality over quantity	3.5%	1.5%	2.1%	2.7%	3.9%	2.4%	2.3%	3.7%
More support for parents	3.1%	1.5%	2.5%	2.0%	2.9%	4.8%	2.7%	2.9%
Comparable pay	3.1%	1.5%	3.5%	1.5%	3.2%	4.8%	2.7%	2.7%

Source: NZIER, MoE

³³ Percentages do not sum to 100 as more than one theme can be attributed to a respondent.

Appendix A Methodology

An early childhood survey was available on the Ministry of Education's website Kōrero Mātauranga from 14 June-12 July 2018. This survey received 2,456 responses. There was also some commentary from social media which we analysed.

Due to the survey questions being open-ended, it was essential to go through each individual response for each question to determine the main themes. For each open-ended question, we coded the responses into between 40 and 50 themes. As expected, there were some overlapping themes across all the questions. We have presented the top ten themes for each question.

After coding all responses, we conducted some demographic analysis to determine the relative importance of the themes for each group. The demographics we examined were:

- All respondents
- Children who need extra support to learn
- Respondents' classifications – parents, teachers/kaiako and owners/managers
- Respondents' ethnicities – NZ European, Māori, Pacific and Asian
- Respondents' locations – city, town and rural
- Respondents' service type – kindergartens, Ngā kōhanga reo, playcentres, home-based services, education & care services, hospital-based services and playgroups.