

Huckleberry Coast  
Childcare Society



# Huckleberry Coast Childcare Needs Assessment

Executive Survey Summary Report

Prepared by  
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### Huckleberry Coast Childcare Society

is a registered non-profit located in Gibsons on the Sunshine Coast. Its mission is to support Sunshine Coast families in day-to-day life by expanding the number of available childcare spaces; increasing community awareness about the importance of quality childcare; and networking parents, caregivers and professionals who can help with whatever needs you and your child have.

[[www.huckleberrycoast.ca](http://www.huckleberrycoast.ca)]

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## **Executive Summary**

The 2014 Huckleberry Coast childcare survey demonstrates that more childcare spaces on the Sunshine Coast are required to meet the preferences of parents and guardians.

The results show that there is dissatisfaction with childcare on the Sunshine Coast, especially among families who rely on casual, unpaid care to meet their flexible needs. Stated preference responses indicate some of this demand may be met by additional paid childcare services.

The purpose of the 2014 Huckleberry Coast Childcare survey was to find out how the childcare needs of families - particularly around flexible childcare and non-standard hours of care - are met on the Sunshine Coast in 2015. The survey also captured families' preferences for childcare, revealing dissatisfaction with the current service situation. Survey responses suggest that there is strong demand for additional childcare provision to support Sunshine Coast families.

### **Current demand for childcare on the coast (families' needs)**

Almost all parents say that their children need some form of childcare and a need for non-standard hours of care is evident. Currently, 83.5% of all children need flexible childcare during the early morning, after-school hours, daytime work hours, in evenings, and in emergencies or on other unpredictable occasions. Overall the greatest demand has been identified as more flexible childcare during daytime hours than at any other time.

### **How are families meeting their childcare needs**

Unpaid family support meets the need for flexible childcare in 84.6% of all instances. Families that are able to access formal childcare tend to be satisfied with their situation. However, if family or friends are used in the same situation, the level of satisfaction is only 37.8%. It appears that the flexible nature of the need does not fare well with paid services. The same pattern of dissatisfaction is evident when regular childcare is needed - but regular childcare is more often provided via paid services.

### **Current Cost of Child Care**

The adjusted average cost of flexible childcare and regular childcare respectively as reported by families is \$7.05 and \$6.11 per child per hour. These costs easily compare to Municipalities in the Metro Vancouver Region. Families using regular paid childcare services only would pay on average between \$806 and \$1075 for full-time care per child per month. Given typical household incomes, these costs are prohibitive for many households on the sunshine coast. Average costs for

**Flexible Childcare** is childcare not needed on a regular, predictable basis. An example of flexible childcare only would be, if respondents do not require regular early morning care, but sometimes need to be on an early ferry. While regular childcare needs can only occur once per child (i.e. either full, or part-time care is needed at any given time), multiple flexible needs can exist simultaneously for each child (i.e. in emergencies and for an early morning commute).



flexible childcare use range between \$49 and \$139 per child per month, depending on the type and duration of care.

### **A childcare model that meets families needs**

There are two factors that most likely hamper access to childcare:

- The first might be people who cannot afford to place their children in paid childcare and hence have to rely on unpaid services (or a mix of both).
- The second might be people who are excluded from "regular" paid childcare by its strict, contract-based registration and scheduling due to the flexible nature of their needs.

A new childcare option/model that would satisfy parents who want flexible childcare has to be affordable - and flexible at the same time. The survey provides some starting points for further exploration to create an attractive childcare model:

The survey showed that a new childcare service would be best situated in either Gibsons or Sechelt. Most families want to access childcare services where they currently live and greatest demand lies in these two areas. With respect to service delivery, flexible childcare is needed for more hours during the day than the evening or the morning. More than 80% of respondents indicated that they would be willing to change their situation to access childcare in the mornings or evenings. Based on these observations, while a flexible daytime service would fail to meet all existing needs, especially fringe times, it would tap into a larger demand for care that is currently not satisfied. Tapping into the highest demand will be an important factor to start a new childcare service that can, once established, expand its services.

While the need has been assessed with this survey, a more thorough analysis is needed to establish the exact parameters to inform any forthcoming model. The biggest challenge will be to make a purely flexible model affordable, while working on an economic level that is self-sustaining.



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## 1 Introduction

The purpose of the 2014 Huckleberry Coast Childcare survey was to find out how the childcare needs of families are met on the Sunshine Coast in 2015. The survey also captured families' preferences for childcare, revealing dissatisfaction with the current service situation. Survey responses suggest that there is strong demand for additional childcare provision to support Sunshine Coast families.

In 2012, the Sunshine Coast Early Childhood Development Planning Table's Strategic Plan noted that "there was a perceived need among caregivers and parents for more quality, licensed child care spaces"<sup>1</sup>. The 2014 Community Resource Centre's Progress Plan also found that "there was a lack of available and affordable child care spaces on the Sunshine Coast".

This perception is supported by the Vancouver Coastal Health Licensing Registry 2014 and BC Stats Population estimate for the Sunshine Coast Regional District, which currently list 550 licensed and registered child care spaces to serve approximately 3005 children aged 0-12 years living on the Sunshine Coast.

According to the progress plan 2014, particularly flexible childcare spaces "to meet the need of parents, who work in the evenings, on weekends, or shift work" are in demand<sup>2</sup>.

With the Huckleberry Coast Childcare survey we built on these findings by investigating the need for flexible childcare, particularly during non-standard hours.

The report concludes with a discussion of considerations for the development of an alternative childcare model.

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<sup>1</sup> Sunshine Coast Early Childhood Development Planning Table (SCECDPT) (2012): Child Care Survey Analysis Report: Page 1.

<sup>2</sup> (ibid.)



## 2 Current demand for childcare on the coast (Families' Needs)

We asked parents about their ideal childcare situation. Almost all parents say that their children need some form of childcare. A need for non-standard hours of care is evident.

*When asked to please tell us what would be their preferred, ideal childcare, assuming it was available, parents responded that...*

...half of all children, representing just over half of all families, need childcare on a regular basis. Regular childcare includes half-, full-, part-time and occasional regular needs<sup>3</sup>. Graph 1 provides a breakdown by need. Part-time childcare is needed the most. Two thirds of those children who need regular childcare, need it during the work week only (Monday-Friday). The remaining third needs regular childcare on weekends as well. Across all regular need categories between 78% to 91% of children need childcare throughout the entire year, including July and August.

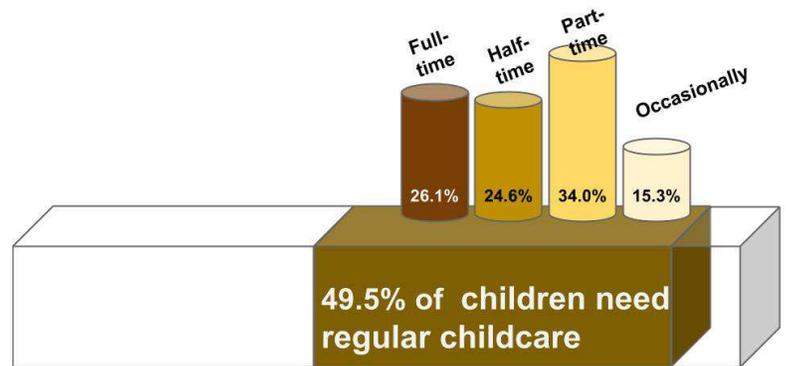


Illustration 1: Regular childcare needs (n=203/411 children)

**Flexible childcare and non-standard hours of care are needed by a large number of children.**

**83.5% of all children need flexible childcare during the early morning, after-school hours, daytime work hours, in evenings, and in emergencies or on other unpredictable occasions<sup>4</sup>.** The share of all uses by particular types of childcare is shown in Graph 2. With 64%, an overwhelming majority of

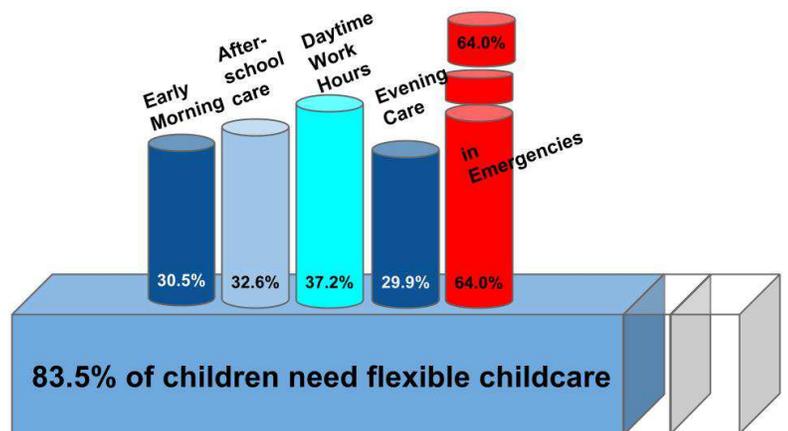


Illustration 2: Flexible childcare needs. (n=344/411). Families were able to report multiple needs per child. (Totals add to more than 100%).

<sup>3</sup> **Regular Childcare Definitions:** Full-time = More than 30 hours per week, during work hours; Half-time = 20 to 30 hours per week, during work hours; Part-time = Less than 20 hours per week, during work hours; Occasionally = A few hours per week, during work hours;

<sup>4</sup> **Flexible Childcare Definition:** Flexible childcare is childcare not needed on a regular, predictable basis. An example of flexible childcare only would be, if respondents do not require regular early morning care, but sometimes need to be on an early ferry (etc.). While regular childcare needs can only occur once per child (i.e. either full, or part-time care is needed at any given time), multiple flexible needs can exist

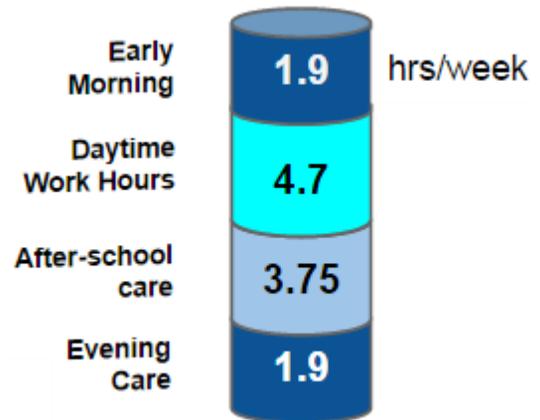


families need emergency-childcare for their children at any given time. Other needs are more evenly spread, with about 1/3 of children needing each type of flexible care. More families require a flexible childcare option during daytime hours than any other time.

**Care during non-standard hours is needed by a total of 31% of children in the early morning and 30% in evenings. A need for some form of support during non-traditional hours of care is clearly evident for a large share of children.**

The extent of flexible childcare needed varies strongly from family to family. Graph 3 reports the current duration of Sunshine Coast families' use of different types of flexible childcare in hours/week/child.

Currently, during a regular week and across all families who need a particular type of flexible childcare, the most use of flexible childcare is made during daytime work hours. This type of care has a median use of close to 5 hours per week. It is followed closely by flexible after-school care with a median of 3.75 hours. Non-standard hours of care are needed significantly less, with only 1.9 hours per week for both early morning and evening care.



*Illustration 3: Flexible childcare use - Average hours per week per child*

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simultaneously for each child (i.e. in emergencies and early morning commute).



### 3 How are families meeting their childcare needs? (Use)

**We asked families how they currently use childcare to meet their needs. Respondents rely significantly more on family and friends to satisfy their childcare needs on the Sunshine Coast than on paid providers.**

*Based on the indicated needs, we asked families how they are you currently meeting all their needs for childcare. We found that...*

...paid childcare providers are used in only 19% of cases where childcare support is needed, while family and friends are used in 81% of all instances.

Multiple providers can be used to meet one need for childcare. This is true for flexible, as well as regular needs. Keeping this fact in mind, we enquired further into the nature of these uses.

On the left of Graph 4 we distinguish between **regular** and **flexible uses**.

Each of the sections contains the various sub-types of childcare accessed by families on the coast. Emergency care was omitted from the analysis. While 64% of respondents **need** emergency support at times, the reported median hours of actual **use** are very low (<1 hr/week).

The red bars on the right indicate the various family uses to meet a particular need. Blue bars show the current significance of paid providers across all of the uses.

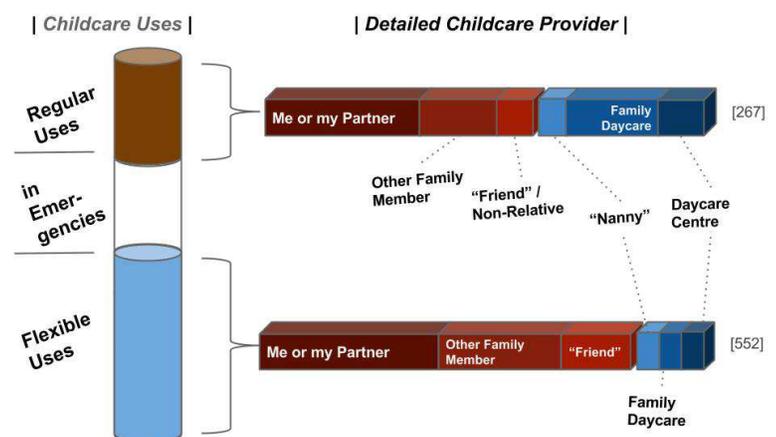


Illustration 4: Childcare providers by type of childcare use

**Unpaid family support meets the need for flexible childcare in 84.6% of all instances** (top red bar). It appears that the flexible nature of the need does not fare well with paid services. Paid services are considerably insignificant in meeting the needs of families when compared to unpaid support. This is not surprising when considering that paid providers require registered children to attend for a minimum schedule to make a business viable. Surprisingly, **with 37.8% of all cases, even regular childcare needs are seldom met with the support of paid providers** (top blue bar). On the paid side, family daycares stand out as the main provider of childcare services for families who indicated a need for regular childcare.



## 4 How much are families paying for childcare?

The costs for paid childcare are significant for many Sunshine Coast families. Families using regular paid childcare services only pay on average between \$806 and \$1075 for full-time care per child per month. These are significant costs for a typical family household on the sunshine coast. Average costs for flexible childcare use range between \$49 and \$139 per child per month, depending on the type and duration of care.

Asking families for details on the reported providers, we learned that...  
 ...where paid **flexible childcare** is used, families pay an adjusted average of \$7.05 per child per hour. Where **regular childcare** is accessed through paid providers the adjusted average is \$6.11.

It is important to keep in mind that the majority of childcare is provided by relatives. Also, as shown above (Section 3), families seldom use only one provider to meet their childcare needs. If paid providers are used, costs can arise for more than one source. At the same time, since more than one provider can be used to meet one need, families may also rely on a mix of family- and non-family uses. Hence, real cost of childcare for individual Sunshine Coast families will likely differ greatly from the established averages.

Under the assumption that only one paid service is used to provide childcare, graph 5 shows a breakdown of costs by use. In combination with the previously established averages of times of use, we can infer the average costs for types of paid childcare use. This method is useful to gauge extremes under the current pay and use structure. What becomes clear using this model is that the costs for using paid childcare are significant for many Sunshine Coast families.

As an example, the average cost for regular full-time childcare on the Sunshine Coast, depending on the hours of use, will range from between \$806 to \$1075 a month. This represents between 11,2% and 15% of a monthly median household income for couple families and 21.6% and 28.8% for a typical single parent household<sup>5</sup>.

A family with an average need for any type of flexible childcare would incur significant additional cost between \$60 and \$130 a month per child. Such costs may be inhibiting for many families given typical household incomes.

Flexible Care			Average	Regular Care		
Evening Care	After School Care	Day-time Care		Full-time	Half-time	Part-time
1.87 hrs	3.73 hrs	4.67 hrs	hours per week	30-40 hrs	20-30 hrs	10-20 hrs
\$15.14	\$24.53	\$32.39	cost per week	\$188-\$251	\$119-\$179	\$62-\$124
\$60.55	\$98.11	\$129.55	cost per month	\$806-\$1075	\$512-\$768	\$267-\$533
			per child			

Illustration 5: Average cost of childcare by type of childcare use per child

<sup>5</sup> The median household income for couple families with children in 2011 was \$86,247. A typical lone-parent household earned \$44,848.00 according to the 2011 Statistics Canada National Household Survey.



## 5 How (dis)satisfied are families with their childcare situation?

Where family is used to provide regular or flexible childcare services, respondents are clearly more dissatisfied with their situation than in cases where paid providers are accessed.

We asked participants how satisfied they are with their current care situation with regards to location, cost and provider (where applicable). As seen in Illustration 6, the level of satisfaction varies greatly between paid and non-paid providers.

Families that are able to access formal childcare to meet their regular needs tend to be *satisfied with their situation*<sup>6</sup>. This is the case in 81.5% of all cases where regular childcare is needed and accessed through paid providers. **If family is used in the same situation, the level of satisfaction is only 44.2%.**

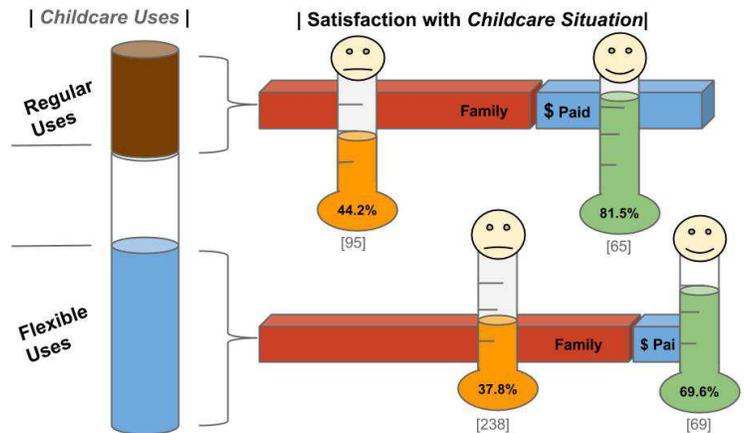


Illustration 6: Families' satisfaction with current care situation

With 69.6% of families being *satisfied with their situation*, the level of satisfaction is lower among those accessing paid childcare providers to meet their flexible, rather than regular needs. **However, the overwhelming majority of uses are currently delivered by family or friends themselves – and respondents are not happy with their situation. In these cases only 37.8% of respondents indicated that they are satisfied with their situation.**

<sup>6</sup> The coloured indicators shown in graph 6 and graph 7 summarize cases which indicate that a respondent is either "+ Satisfied" or "++ Very Satisfied" with their provider or situation. In cases where more than 2/3 of respondents fell into either of the two categories, they were classified as "satisfied with their situation" signified by a green bar. In cases where between 1/3 and 2/3 of respondents answered accordingly an orange bar was used to symbolize "generally not satisfied with their situation". A red bar ("very dissatisfied with their situation") was used where this was the case for less than 1/3 of respondents (not given).



## 6 Non-standard hours of care

The Huckleberry survey set out to explore non-traditional hours of care in particular, guided by results from previous community research, such as the Sunshine Coast Early Childhood Development Planning Table's Strategic Plan from 2012.

Graph 7 provides a detailed glimpse at the current satisfaction levels with paid and family-provided flexible childcare.

**As seen in the graph, across all needs for flexible childcare, families are not satisfied with their current situation.**

Additionally, between 86-95% of parents who were not fully satisfied with their situation would be willing to change their situation.

In a recent survey<sup>7</sup> the Sunshine Coast Childcare Resource and Referral Program<sup>8</sup>, together with the Child Care Action Team (CCAT) gathered "information from registered and/or licensed child care providers to determine if existing providers are able to provide non-traditional child care". The questionnaire found that the registered "child care service providers surveyed do not currently operate at hours that would meet the child care needs of parents who work in the evenings, on weekends, or shift work". Hence, current providers are not able to provide non-traditional hours of care. The reasons given were particularly of financial nature, but also the lack of qualified personnel<sup>9</sup>.

The need to create a childcare model to suit these needs better is clear.

		Respondents Satisfied	Responses
Flexible Uses	Early morning for commuting or shift-work	Paid	X
		Family	36.2%
	After school care	Paid	X
		Family	41.8%
	During daytime work hours	Paid	74.1%
		Family	31.8%
	Evening care	Paid	X
		Family	40.8%

*Illustration 7: Satisfaction with paid and family-provided flexible childcare*

<sup>7</sup> Sunshine Coast Early Childhood Development Planning Table (SCECDPT) (2012): Child Care Survey Analysis Report.

<sup>8</sup> Sunshine Coast Childcare Resource & Referral Program. <http://www.coastccrr.ca/>.

<sup>9</sup> For more information directly contact the Sunshine Coast Childcare Resource & Referral Program.



## ***7 A childcare model that meets families' needs***

**The survey revealed a high need for childcare among families on the Sunshine Coast. It was also shown that family and friends are the main providers of any form of childcare. Where family provides childcare, however, dissatisfaction is more prevalent. Additionally, existing institutional childcare providers are not able to meet flexible needs during non-standard hours.** To satisfy families' needs, the Sunshine Coast requires a care model that is capable of accommodating flexible demand more efficiently.

To find a suitable childcare model, it is important to look beyond the stated need and dissatisfaction with the current situation.

As in any service, only a reliable income stream ensures that it can be maintained. Different from a regular care model, no reliability of income exists in a flexible care model, assuming that families will only pay for hours in which they use the service. The challenge is that in a flexible model the income stream will be as flexible as the use that will emerge.

To develop a flexible model for childcare the number of care-hours provided will determine its financial viability. Reaching a certain number of care hours per month, rather than a stable number of children, is the critical goal. Only with enough families using the service for a certain number of hours will the model become feasible.

To make such a model work, it is important to tap into the largest demand among families. To provide childcare during non-standard hours in an economic fashion, a sufficient demand has to exist in the morning or for care in the evening.

The data shows that, while a sizable number of children need and use flexible early morning and evening care, and dissatisfaction is high among families, the average duration per month for which such non-traditional hours of care are needed is relatively small. **On average, families on the Sunshine Coast use 8 hours per month of each, evening and morning care. Flexible after-school care and care during daytime work hours are used 16 and 20 hours per month respectively.**

**Flexible childcare is needed for more hours during the day than the evening or the morning.**

Based on these observations, while **a flexible daytime service** would fail to meet all existing needs, especially fringe times, it would tap into a larger demand for care that is currently not satisfied.

The location, cost and preferred provider for a flexible alternative during the



daytime will be explored in the next section.

	Need	Use				Preference					
		Average hrs/week	Current Provider	Satisfied	Respondents*	Ext. provider in my home	Daycare	Daycare Centre	No Change or Others	Respondents*	
After-school care	27%	3.75	Family Use Paid	89.5%	41.8%	55	21.6%	13.7%	49.0%	15.7%	51
			# Resp.	10.5%	X	70					
During daytime work hours	30%	5	Family Use Paid	76.4%	31.8%	66	15.3%	30.5%	52.5%	1.7%	59
			# Resp.	23.6%	X	93					
Total	411 children										

\*Number of respondents originally higher; to establish comparability between variables only those who completed the survey were included in this analysis

ABCX: low rate of response: data only to be used indicatively

*Illustration 8: Detailed overview of flexible after-school care and care during daytime work hours: current needs, uses and preferences*

“After-school care” and “during daytime work hours” are two flexible categories respondents were able to choose as existing needs. The table shows an equal share of about 30% of all children having daytime care needs. At the present time the large majority of these needs are met by family. Only between 30% to roughly 40% of respondents indicated their satisfaction with this situation. After informing us of their current satisfaction, their provider and time used per month, they were able to voice their preferences with regards to cost, provider and location. Preferences were only asked for if respondents indicated that they were dissatisfied - and willing to change their provider. More than 80% of respondents indicated that they would be willing to change their situation in both cases. **Those who indicated their preferred provider clearly favoured a daycare centre alternative over all other options.** The data indicates that, if such an alternative were available, it would be accessed by families.

In terms of the **location preferred by respondents** who would be willing to change their location, the difference between current location of care and preferred location is relatively small, particularly for flexible needs. **Most families want to access childcare services where they currently live.**

Minor variations stand out for the two larger settlements on the coast. Both towns, Gibsons and Sechelt, were indicated as preferred locations by more people than currently live there. Roberts Creek, on the other hand is a less preferred location for childcare. A smaller share of respondents than currently use childcare in the towns would see their preferred provider in this location. Presumably, some of the users of childcare from Roberts Creek are those would prefer to access services in Gibsons or Sechelt.

In conclusion, **a new childcare option/model that would satisfy parents who want flexible childcare would be best situated in either Gibsons or Sechelt.**

While the need has been assessed with this survey, a more thorough analysis is needed to establish the exact parameters to inform any forthcoming business model.



## **8 A flexible childcare model - concluding discussion**

Respondents indicated higher satisfaction with paid services and low satisfaction with unpaid services. Families are using multiple providers - family and paid - to meet their needs at the moment.

Given the high rates of dissatisfaction, the current childcare model has to change in one way or another to achieve a high level of satisfaction. The lever for positive change is to make more suitable childcare available. This is not to conclude that families using unpaid services at the moment may necessarily find the use of paid services satisfying.

Rather, higher satisfaction will be experienced once childcare becomes available at the right time, in the right location, with the right quality and at an affordable price. Families are also likely to be more satisfied if one single provider can meet multiple existing needs as it will decrease the current complexity of various care providers.

General factors that may drive families to use their current providers even when they express dissatisfaction may be of two camps:

The first might be people who cannot afford to place their children in paid childcare and hence have to rely on unpaid services (or a mix of both). The second might be people who are excluded from "regular" paid childcare by its strict, contract-based registration and scheduling due to the flexible nature of their needs.

Particularly for families using flexible childcare, both factors - affordability and flexibility - have to be addressed in any forthcoming model, as well as being able to ideally address a variety of flexible needs at different times of the day, the year or the week.

As outlined in the previous section, tapping into the highest demand - which is currently flexible daytime needs - will be an important factor to start a new childcare service. Furthering the breadth of services over time as the model gets established may be a consideration to ultimately meet families' needs more adequately.

The biggest challenge will be to make a purely flexible model affordable, while working on an economic level that is self-sustaining.

To achieve the above goals, a community-based non-profit alternative might meet preferences better than a for-profit business on the Sunshine Coast.



## 9 Limitations of the Study

The study recruited a relatively small sample, resulting in non-significant responses at the very detailed level, particularly around preferences for alternatives over families' current situation. Needs and uses (types of providers used to meet needs) were determined to be significant when evaluated across the sample. A breakdown by location, incomes, type of family households however, was not possible although originally envisioned.

Since some respondents commented on the unclear distinction between after-school care and care during work hours, both categories were tested for covariance and subsequently merged to arrive at more clearly defined definition of childcare needs by time of the day.

It is important to also keep the distortion in our data set in mind. Our sample had a higher employment rate, a higher median income, and less single mums and dads than Statistics Canada information indicates for the Sunshine Coast. The smaller share of single parents may explain the distortion in overall household incomes, and warrants caution moving forward. The findings are applicable more so to couple-parent than single parent households. Couple-families with children may have more ability to pay for childcare services. However, even more demand for flexible care may be present among single parents than couple-parents, which may have a positive impact on the envisioned flexible model's viability for early mornings and evenings. If external funding can be secured to subsidize any forthcoming model, special consideration may be given to exploring the needs of single parents in particular.

	2014 Needs Assessment	Sunshine Coast Labour Force Statistics
<b>Total Labour Force Status</b>	438	24,385
<b>In the Labour Force</b>	391	14325
<b>Employed</b>	379	13,290
<b>Unemployed</b>	12	1030
<b>Not in the Labour Force</b>	47	10065
<b>Participation Rate</b>	<b>89.3%</b>	<b>58.7%</b>
<b>Employment Rate</b>	<b>86.5%</b>	<b>54.5%</b>
<b>Unemployment Rate</b>	<b>2.7%</b>	<b>7.2%</b>

*Illustration 9: Sample Employment Information*



For more information on Huckleberry Coast and this report, please directly contact  
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