

Devon  
County Council



Children and Young People's Services  
Early Years and Childcare Service

# Childcare Sufficiency Assessment Employer Survey 2009 - 2010

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Prepared by Bournemouth University on behalf of  
Devon County Council



## **The National and Local Contexts**

The Children and Young People's Services Early Years and Childcare Service at Devon County Council is working within a complex framework of policy and procedure. Since the introduction of the Early Years Development and Childcare Partnership in 1997 many new developments have happened on a yearly basis and it has overseen a number of key successes including the creation of registered childcare places and encouraging parents in Devon to access the free early years entitlement.

In the past the provision of formal childcare was dominated by the private and voluntary sectors. The childcare sector saw limited input from the Government other than regulation and inspection and local authority involvement in provision and development was minimal. In the 1990's there was a significant growth in parental demand for childcare in terms of volume and value but the market was characterised by high occupancy levels and as demand exceeded supply in almost all geographical areas fees continued to increase.

In response to the evolving childcare market the National Childcare Strategy was introduced in 1998 and numerous central government policies and initiatives have since impacted on the development of the childcare market. A number of these objectives were further developed as part of the Government's Ten Year Childcare Strategy (December 2004). The objective to meet *"the supply of, and demand for, formal childcare which may be registered, unregistered or approved and which meets the needs of 'working parents'"*, was addressed with the Childcare Act 2006 being established. The Act places a strategic role on local authorities and is a core component of the framework for children and young people's service established in the Children's Act 2004.

## **The Childcare Sufficiency Assessment**

Section 11 of the Childcare Act 2006 requires all local authorities to undertake a Childcare Sufficiency Assessment. The assessment enables local authorities to identify gaps and establish plans to meet the childcare provision of parents who wish to work or undertake education or training leading to work. Regulations under Section 11 of the Act require local authorities to consult with a number of key groups including local employers and their representatives.

### **Aims and Objectives**

Devon County Council has sought to consult with employers'; giving those with an interest in childcare an opportunity to highlight relevant issues or concerns about the impact that childcare has on their respective organisations. More specifically Devon County Council seek to consider the views of employers about employees' demand for childcare and how improvements to the provision, access, quality and affordability of childcare could assist them with recruitment, retention and motivation of staff.

A key aim of the research is to identify where there may be gaps in provision between supply and demand so that Devon County Council can address the need at a local level. Findings from the consultation will be used to inform the strategy and action plan on how these gaps can be filled effectively. This will include addressing barriers that prevent specific groups from accessing childcare, specific times to meet working patterns, encouraging the take-up of childcare financial support, supporting quality improvement, sustainability and growth in the childcare market across Devon and at local level. This information will feed into the full Childcare Sufficiency Assessment and will sit alongside estimates of demand from parents across Devon, the views of childcare providers and children and young people. This agreement will allow Devon County Council to successfully meet the statutory duties placed on it

with regard to the Childcare Sufficiency Assessment. Specific objectives include:

(a) Identify the views of employers in Devon on their local childcare market.

These will be based on the views of employers who are:

- large businesses (50+ employees)
- medium businesses (11-49 employees)
- small businesses (1-10 employees)

(b) Identify any possible changes in future demand for childcare.

(c) Explore the barriers to the take up of childcare amongst specific employee groups and the impact on recruitment, retention and motivation.

## **An Overview of Devon County Council**

Devon is an area of many contrasts and is the fourth largest of the English counties. The distinct identities of the diverse communities remain strong and bring together 29 towns and 62 electoral wards (excluding Plymouth and Torbay, two independent unitary authorities). Much of Devon is rural and includes two national parks and a world heritage coastline. Unemployment is low compared with the rest of England, but wages are among the lowest nationally.

## **Population**

The population of Devon is estimated at 754,800 (2008 mid year estimate) with population density ranging between 0.46 (rural West Devon) and 25.81 (Exeter City) people per hectare across Devon's districts. The latest government population projections (2006) indicate that numbers will rise by 309,200 between 2006 and 2031. The largest growth in numbers will occur in the older population. Numbers of those aged 65+ are projected to rise by 157,700 by 2031. Numbers of 0–14 year olds are predicted to increase 19% by 2031 and the 15–19 year olds are projected to decline by 8% over the next 6 years, but increase again by 20% until 2031.

The total number of households containing at least one child is estimated at 77,436 out of a total number of estimated households of 298,574 (2001 census data, Office for National Statistics). HMRC Child Benefit Data indicates that the number of families with at least one child rose to approximately 79,510 families in 2006. The number of dwellings in Devon is projected to rise by 20,000 between 2006–2026. The two main developments behind this projected rise are population growth and a decline in household size.

## **Economy**

Devon characterises the South West region and the UK as a whole to a significant extent with its small firm economy. In 2006, there were 30,000 VAT registered businesses in the county. 96% of these had fewer than 20 employees, with 91% having fewer than 19. A particular feature of the Devon economy is the high level of self employed, many of whom may not be covered by the VAT registration based statistics. The Devon Sectors and Clusters Study reported that the county of Devon has the largest number (some 64,000) of self-employed in the South West region and the highest percentage of the workforce who are self-employed (almost 20%).

## Key findings

- The survey comprised mainly of private sector organisations.
- A large proportion of organisations offer flexible working arrangements to their staff.
- The most common types of flexible working arrangements organisations offer are 'other', which include informal arrangements and temporary reduced hours.
- The majority of organisations have not experienced problems with employees taking up employment with them or continuing to work for their organisation.
- The majority of organisations have not found childcare to be a factor in preventing an employee taking-up employment with them or continuing to work for their organisation.
- More affordable childcare is cited as being the change most required to help improve recruitment and retention of staff.
- The majority of organisations said there is not a need for childcare to be available at weekends.
- Nearly half of organisations see the number of employees increasing over the next three years.
- Nearly a third of the organisations provide childcare vouchers to employees.
- The majority of organisations are unaware of DISC the Devon family information service.

## **Methodology**

The Market Research Group (MRG) based at Bournemouth University was commissioned by Devon County Council to undertake a study of all employers in the Devon conurbation (with the exception of Torbay and Plymouth). The Experian B2B Prospector Business Directory 2010 was used to create the sample and to segment the organisations by location, size and industrial sector. Devon County Council specified that at least 10 large businesses, 20 medium sized businesses and 20 small businesses were included in the sample.

Organisations in the sample segments were randomly selected, contacted and the person responsible for Human Resources/Personnel or the owners of small businesses were identified. In total, respondents from 55 organisations participated. 51 participated in a structured telephone interview, with responses being recorded (where permission was granted) and entered into an electronic software package by the interviewer and 4 through a self completion questionnaire submitted via email.

The closed questions were pre-coded and entered into the SPSS statistical package and the open questions were subject to thematic analysis using NVivo2 software as an analytic tool.

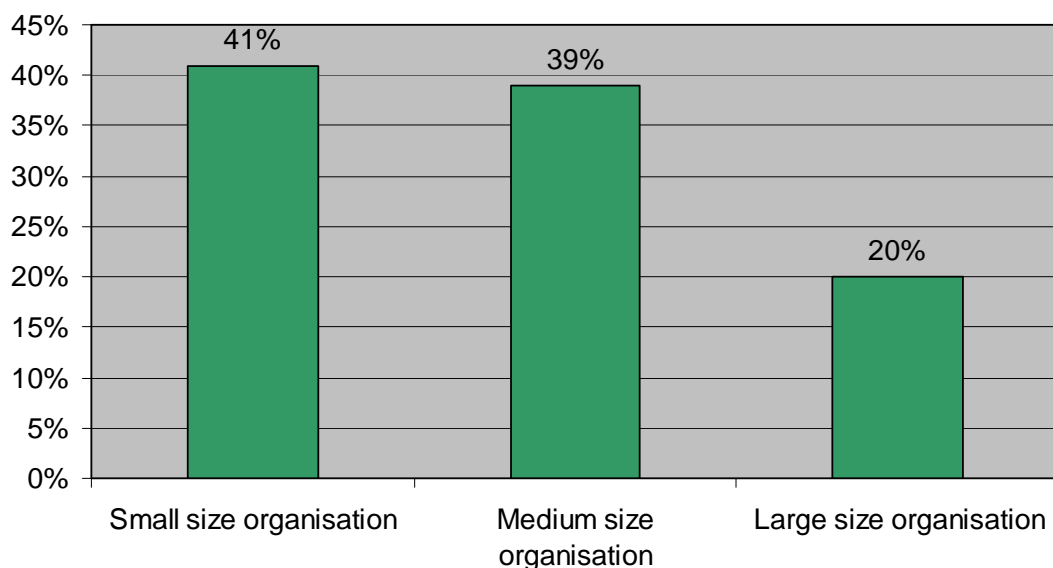
## Research Findings

### Characteristics of the respondents

The respondent organisations were selected to characterise organisations in the Devon conurbation based on location, size and sector.

86% of the organisations who took part in the survey are private sector, 5 % are public sector and 9% 3<sup>rd</sup> sector (voluntary sector). Just under half of the organisations are small businesses employing between 1-10 employees (41%) or medium businesses employing between 11-49 employees (39%) and 20% of the organisation are large businesses employing 50+ employees.

### Size of Organisation



63% of the small businesses said they do not have any employees who work less than 16 hours a week, whilst 37% have between 1–10 employees who work less than 16 hours a week. In comparison, 22% of medium businesses do not have any employees who work less than 16 hours a week whilst 74% have between 1-25 employees working these hours. Only 8% of large businesses said they do not have any employees who work less than 16

hours a week, whilst 58% have employees who work less than 16 hours a week. However, only two large businesses have between 26-50 employees and 101-200 employees who work 16 hours or less.

It is evident that larger organisations have more part-time staff compared to medium and small organisations respectively and this is due to a number of reasons. Larger companies have more job roles so there is a higher chance a vacant post will be filled by employee who wants to work part-time hours. The larger organisations also have a higher number of job roles available that only offer part-time hours or these companies are be in a better position to accommodate part-time employees due to having a higher staff capacity and cover available.

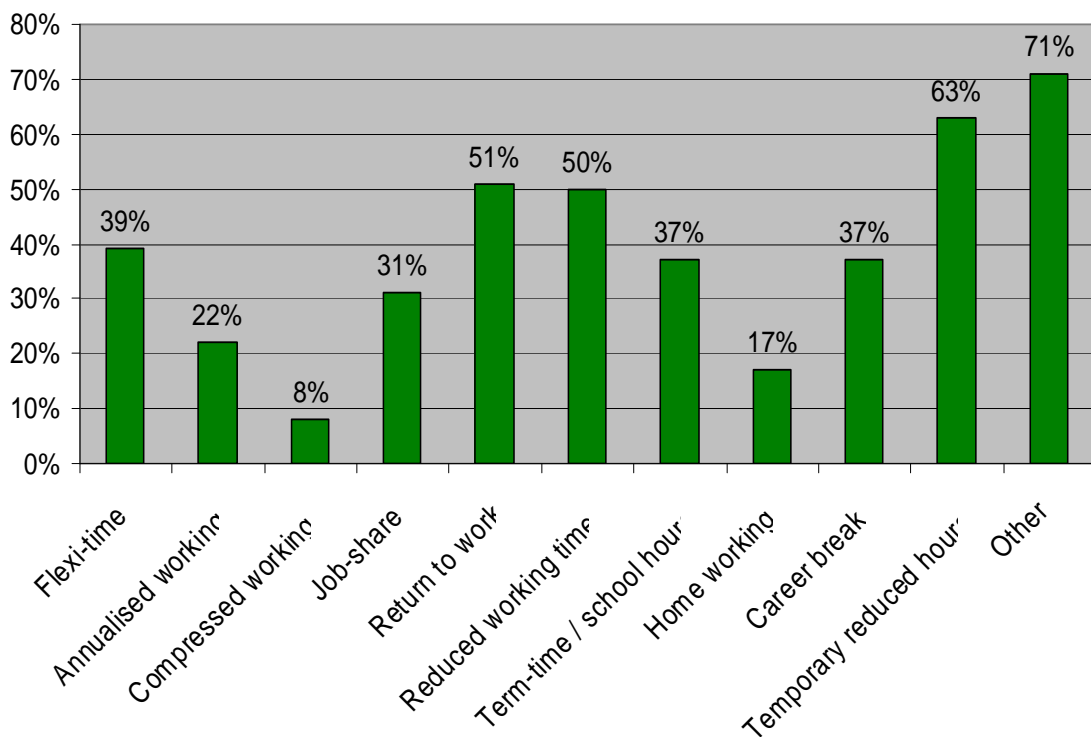
15% of organisations have a 41-50% female workforce, 7% have no female employees and 3% of those interviewed said they don't know. 40% of organisations have at least half of their workforce who are female whilst over 20% have at least a 70% female workforce. 17% of small size organisations do not employ any female staff whilst all of medium and large size organisations employ at least one member of female staff. Overall, only a small proportion (4%) of small and medium size businesses employ very few female staff (less than 10% of staff) with a slightly higher proportion of large businesses (8%). At the other end of the scale, a business with nearly all female employees (greater than 80% of staff) is more likely for small and medium businesses. None of the large organisations had an over 80% female workforce. Parents with children aged 14 years or under make up 31-40% of the workforce in 14% of organisations whilst 7% of organisations do not have any employees with children aged 14 years or under. 22% of those interviewed don't know what percentage of their work force have children aged 14 years or under and this may require further investigation to provide a more accurate picture. 40% of organisations have a workforce of 61% who have children aged 14 years or under.

The above figures suggest that fewer females are employed compared to males and fewer parents with children under 14 years old are employed

compared to people with older children or no children. This is a common trend in employment demographics and it may be the choice or circumstances of individual females or parents not to work. Circumstances may include, for some, issues with childcare provision.

76% of organisations offer flexible working arrangements to their staff, compared to 24% of organisations who have fixed working hours. The most common types of flexible working arrangements organisations offer are ‘other’ (71%), ‘temporary reduced hours’ (63%), ‘phased return to work’ (51%) and ‘voluntary reduced working time’ (50%).

Working Arrangements available for all staff



It is encouraging that a large number of employers offer their staff flexible working arrangements and for the most part it works well across the employers interviewed. This indicates that employers are helping staff to achieve a work-life balance and accommodating employees’ needs. The

employers who only offer fixed working hours said it was the demands of the job (i.e. fixed opening times) or having small number of employees which prevents them from offering flexible hours. However, these employers recognise flexible working patterns are appreciated by staff and the majority offer informal flexible arrangements if employees require time off within their working hours. The overall consensus is that flexible working has definite advantages and that it should continue to be promoted.

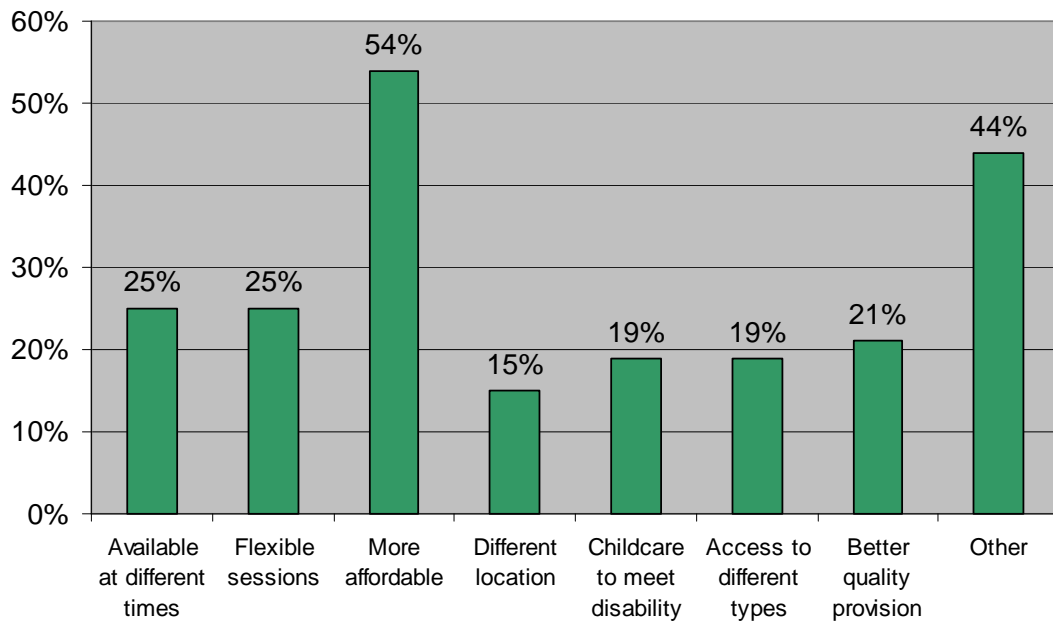
### **Recruitment and Retention**

The majority of organisations (66%) have not experienced problems with employees taking up employment with them or continuing to work for their organisation. 12% said they have experienced a great deal of problems (3%) or problems to some extent (9%). The majority of organisations (73%) have not found childcare to be a factor in preventing an employee taking-up employment with them or continuing to work for their organisation. Only 7% have found this to be a problem to some extent.

It is very encouraging that a number of employers do not experience problems with people taking up employment with their organisation. However, one topic many participants have a unanimous view on is that childcare provision is too expensive (54%) and in some instances the financial benefit conferred by childcare vouchers is simply not enough. This raises the questions of whether employees are getting high quality affordable childcare and if the cost of childcare is outweighing the benefits of returning to work. Issues of affordability may also be restricting employees in their choice of provision.

Employers (25%) mentioned that the opening hours of childcare provision is not long enough and does not always suit their working hours. The majority of the organisations agree that between 07:00–08:00 hours, 16:00–18:00 hours and after 18:00 hours are the key times when more childcare needs to be offered. Furthermore, it is felt the opening hours for childcare provision is too short and not flexible enough (25%).

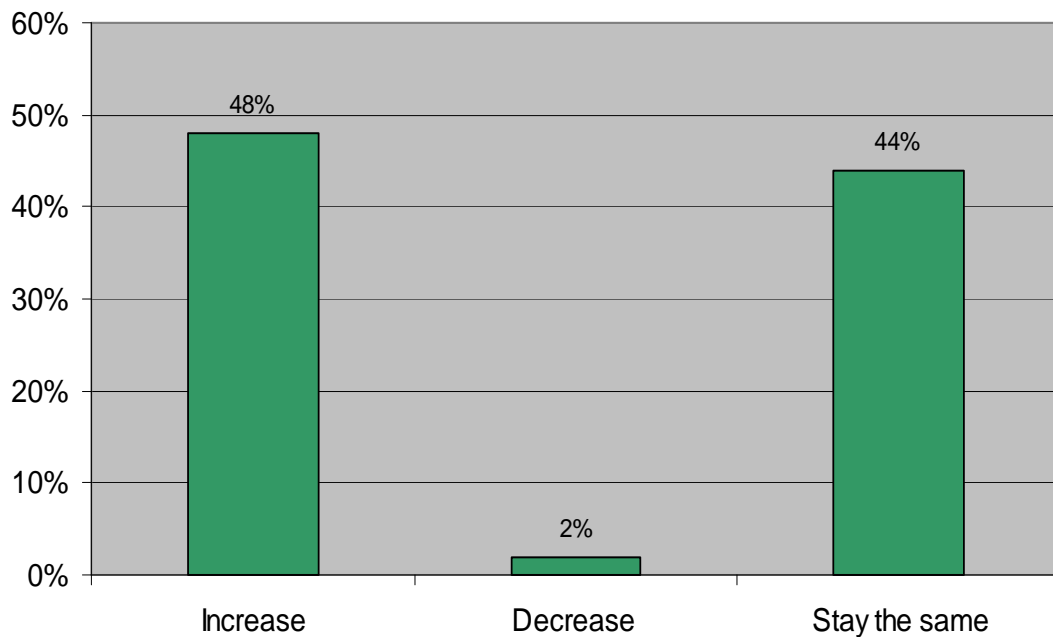
## Improvements needed to childcare to help improve the recruitment and retention of staff



Seven organisations said their employees would prefer childcare that is closer to home, work or study which would save time and money if they did not have to commute and 9 organisations said their employees would benefit from access to different types of childcare namely an after-school club, a holiday playscheme, a nursery class in school or a day nursery. The majority of employers (75%) said there was no need for childcare to be available at weekends in relation to working hours of employees. This is because parents have family members available at the weekends to cover childcare requirements and there is less demand for employees to work at the weekend in a number of sectors.

In the next three years nearly half (48%) of organisations said the number of employees will increase, just under half (44%) said staff levels will stay the same and only 2% expect a decrease in employees. If the requirements for staff is going to increase this implies there may be a greater demand for childcare provision.

## Change in number of staff over the next 3 years



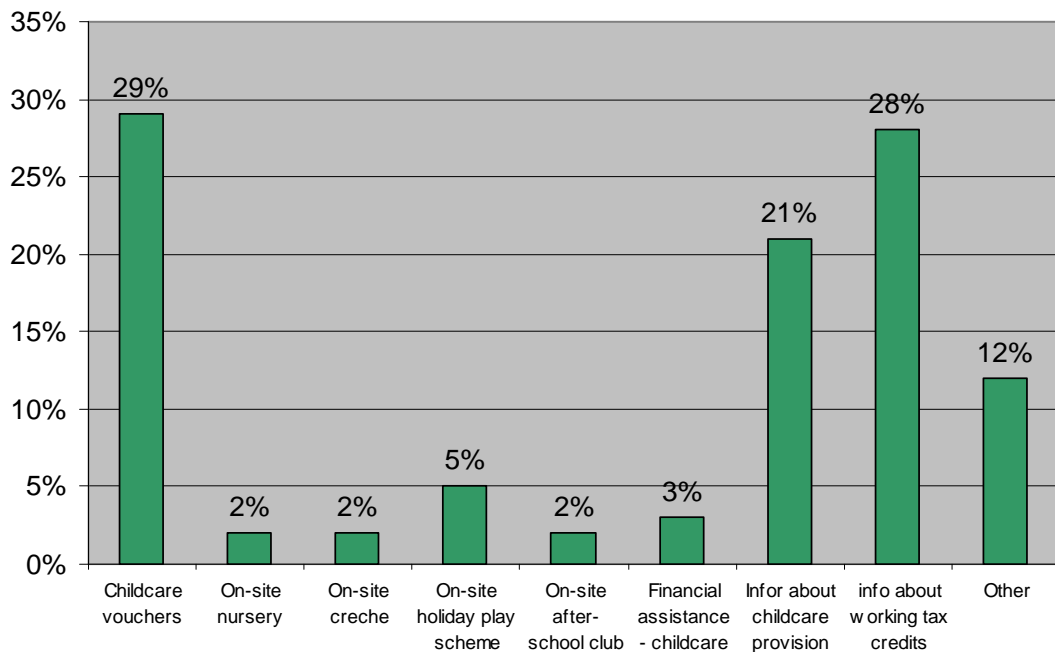
## Childcare

There are a number of potential barriers to further development and progress in the area of childcare support for working parents. Some of these are internal to employers themselves and other are external. When asked about their organisations policies on childcare for their staff a limited number of employers provide provision. Only 29% of employers provide childcare vouchers, 28% provide information about working tax credits and childcare element and 21% provide information on childcare provision. Only two organisations (3%) provide financial assistance towards childcare. One is a small private organisation and the other is a large public sector organisation.

One medium sized organisation in the leisure industry provides on-site childcare facilities for their staff. One small sized company in the private sector provided an on-site crèche, but no longer provides this facility. Male employees make up 89 % of staff and the company sited that because the majority of employee's partners take responsibility for childcare the facility was no longer required. One medium sized leisure organisation in the private

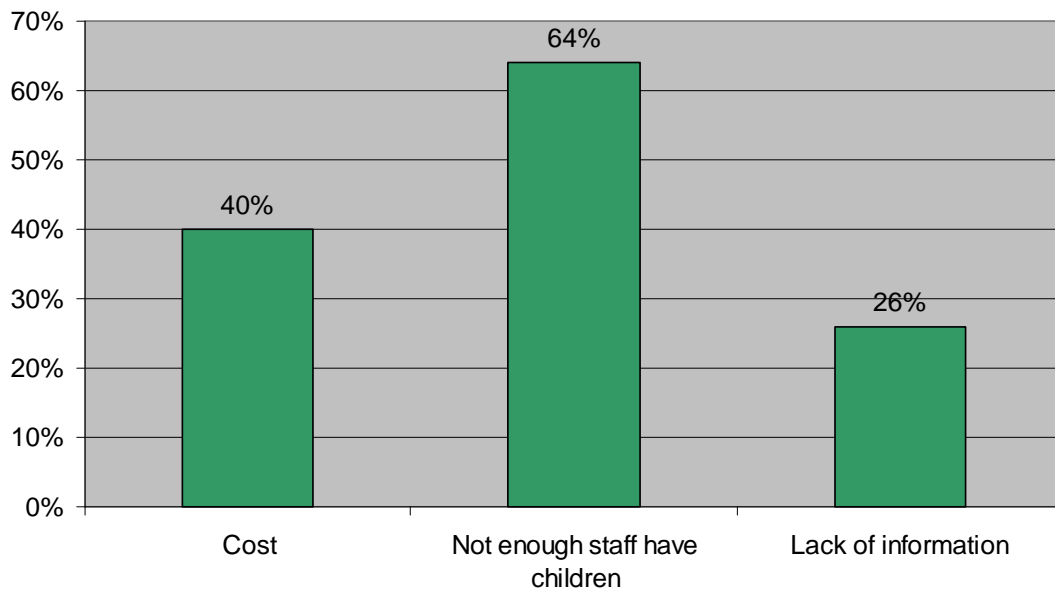
sector is thinking about providing an on-site nursery facility. Three companies currently provide an on-site holiday play scheme. Two of these companies have been mentioned above because they currently provide on-site childcare facilities and one is thinking about providing an on-site nursery facility. Three (12 %) private sector organisations currently provide 'other' types of childcare benefits. One organisation allows staff to bring children into work if childcare is not available, whilst the other two organisations rota working hours around the availability of staff or school hours.

Childcare benefits currently provided



Reasons given by organisations for not offering childcare benefit to staff are sited as 'not enough staff have children who require childcare' (64%), the 'cost' (40%) and the 'lack of information on how to implement childcare benefits' (26%).

Reason childcare benefit is not offered to staff.



This suggests that employees are not receiving the assistance they may be entitled to and employers indicted several reasons for this:

- Commercial reasons are a factor for private organisations. Benefits to employees involve a financial cost to the company which need to be justified in terms of additional productivity and competitiveness in the marketplace which they would bring. 74 % of the organisations who sited cost are private sector companies whilst 13% were either public or 3<sup>rd</sup> sector companies.
- Employers of large organisations which operated on more than one site feel there are only a limited number of benefits which they can offer consistently across the total workforce.
- A lack of awareness and difficulties in obtaining information. Many organisations do not know what other sources of advice and information exists. This is highlighted by the fact that only 73% (and 87% of the organisations who previously stated that the lack of information on how to implement childcare benefits stopped them from offering childcare benefit) of employers are unaware Devon has a family information service called DISC. 73% of the organisations who

site lack of information on how to implement childcare benefits are private sector companies compared to 20% of 3<sup>rd</sup> sector and 8% of public sector companies.

Emergency childcare is an additional issue raised by organisations, with employees on occasion unable to come to work because of problems with childcare. One large organisation is actively investigating ways in which they can help their employees with emergency care.

## **Conclusion & Recommendations**

It is acknowledged by many employers that support with childcare issues is important for their workforce and makes a valuable contribution to staff welfare. The majority of employers are keen to encourage flexibility and work-life balance and the majority have policies and benefits in place which go beyond the statutory obligations towards their staff in this area. A number of common themes emerged from our interviews with employers and they give valuable guidance to Devon County Council as to issues which should be given consideration and credit when assessing the childcare provision in the County.

Choice, availability and provision of childcare are not perceived to be major issues. The key problem areas identified are a lack of affordability, flexibility and location. This is mentioned in a number of contexts, such as restricting choice of types of provision, opening hours, holiday and after school provision.

Organisations recognise the importance of policies to support childcare to ensure retention of good staff. Organisations keep their policies under regular review and many indicated they are willing to explore new and innovative ideas and practice. However, organisations (particularly smaller businesses) feel they are unable to do little beyond what they are doing at present and it should be acknowledged that issues of flexibility and affordability require change at a Government or Local Authority level to ensure employees are getting high quality affordable childcare and that the cost of childcare is not outweighing the benefits of returning to work. Furthermore it is suggested that issues of affordability are restricting employees in their choice of provision. The Council should continue to develop an understanding of current supply, demand and trends within the childcare market through on-going locality needs assessment, commissioning support accordingly specifically in the areas of affordability, flexibility and location.

There is evidence that suggests a lack of childcare provision is available after school, in the school holidays and in an emergency or at short notice. Devon County Council may want to investigate the provision of out of school / emergency / short notice childcare and how employers can help to prevent employees from not being able to come into work. The Council should work to facilitate interaction between all sectors within the childcare market (including employers) to build positive relationships and bridge the gaps in the market to ensure local demand is met through a diverse market base.

All the organisations encourage a formal or informal flexible working structure within the operational constraints of their business. This is popular amongst employees and is highlighted by the fact that very few organisations reported childcare or employees taking up employment or continuing to work for their organisation as a problem. For working parent's flexible working patterns reduces the need to find alternative childcare provision. However, flexible working arrangements is likely to be an area for innovation and expansion in the future; given in the next three years nearly half of the organisations see the number of employees increasing which will place a greater demand on childcare provision. The Council should consider leading the development of a strategy for securing sufficient childcare in partnership with employers and employees within the Local Authority and from across the County. Developing childcare capacity at a local level will secure sustainable modes of provision that meet the demands of local parents which are not currently being met by other providers and which are also affordable, with a particular focus on accessibility for all parents and children. This will continue to develop a quality workforce and it will meet employer's demands.

Organisations expressed a difficulty in obtaining information and a lack of knowledge about what other sources of advice and information exist. Devon County Council's Family Information Service, DISC should continue to deliver and develop the services it currently provides. However, there should be a focus on promoting the services and help DISC provides so employers and employees are better supported with timely, accurate and impartial information, advice and guidance.

A childcare market that offers the reliability, accessibility, diversity and affordability that allows parents to make real choices about balancing work and family life is the Governments vision. Devon County Council should therefore continue to achieve provision that is high quality, flexible and sustainable to secure the best outcomes for childcare.



## Appendix

**Table 1 What sector is your company in?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Private	51	86.4	86.4	86.4
Public	3	5.1	5.1	91.5
3rd sector (voluntary sector)	5	8.5	8.5	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 2 What is your company's main type of business?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Manufacturing	4	6.8	7.8	7.8
Hospitality/catering industry - Hotels/Restaurants/Pubs/Cafe	9	15.3	17.6	25.5
Finance	1	1.7	2.0	27.5
Wholesale and retail	7	11.9	13.7	41.2
Construction	3	5.1	5.9	47.1
Other	27	45.8	52.9	100.0
Total	51	86.4	100.0	
Missing	8	13.6		
<b>Total</b>	<b>59</b>	<b>100.0</b>		

**Table 3 How many people do you employ?**

	Frequency	Percent	Valid Percent	Cumulative Percent
1-10	24	40.7	40.7	40.7
11-49	23	39.0	39.0	79.7
50+	12	20.3	20.3	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 4 How many employers work under 16 hours a week?**

	Frequency	Percent	Valid Percent	Cumulative Percent
None	21	35.6	35.6	35.6
1 - 4 employees	19	32.2	32.2	67.8
5 - 10 employees	5	8.5	8.5	76.3
11 - 25 employees	7	11.9	11.9	88.1
26 - 50 employees	1	1.7	1.7	89.8
101 - 200 employees	1	1.7	1.7	91.5
Don't know	5	8.5	8.5	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 5 How many employers work over 16 hours a week?**

	Frequency	Percent	Valid Percent	Cumulative Percent
None	1	1.7	1.7	1.7
1 - 4 employees	11	18.6	18.6	20.3
5 - 10 employees	19	32.2	32.2	52.5
11 - 25 employees	12	20.3	20.3	72.9
26 - 50 employees	5	8.5	8.5	81.4
101 - 200 employees	4	6.8	6.8	88.1
201+ employees	2	3.4	3.4	91.5
Don't know	5	8.5	8.5	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 6 Approximately what percentage of work force is female?**

	Frequency	Percent	Valid Percent	Cumulative Percent
0%	4	6.8	6.8	6.8
1-10%	3	5.1	5.1	11.9
11-20%	7	11.9	11.9	23.7
21-30%	6	10.2	10.2	33.9
31-40%	6	10.2	10.2	44.1
41-50%	9	15.3	15.3	59.3
51-60%	5	8.5	8.5	67.8
61-70%	5	8.5	8.5	76.3
71-80%	6	10.2	10.2	86.4
81-90%	3	5.1	5.1	91.5
91-100%	3	5.1	5.1	96.6
Don't know	2	3.4	3.4	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 7 Approximately what percentage of work force are parents with children 14 years or under?**

	Frequency	Percent	Valid Percent	Cumulative Percent
0%	4	6.8	6.8	6.8
1-10%	6	10.2	10.2	16.9
11-20%	10	16.9	16.9	33.9
20-29%	1	1.7	1.7	35.6
21-30%	7	11.9	11.9	47.5
31-40%	8	13.6	13.6	61.0
41-50%	4	6.8	6.8	67.8
51-60%	2	3.4	3.4	71.2
61-70%	1	1.7	1.7	72.9
71-80%	2	3.4	3.4	76.3
91-100%	1	1.7	1.7	78.0
Don't know	13	22.0	22.0	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 8 Do you offer flexible working arrangements?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	45	76.3	76.3	76.3
No our company only has fixed working hours	14	23.7	23.7	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 9 Do you offer flexi time?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes this is available for all staff	14	23.7	38.9	38.9
Yes this is available for some staff	5	8.5	13.9	52.8
No we do not offer this type of working hours	17	28.8	47.2	100.0
<b>Total (valid)</b>	<b>36</b>	<b>61.0</b>	<b>100.0</b>	
Missing	23	39.0		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 10 Do you offer annualised working?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes this is available for all staff	8	13.6	22.2	22.2
Yes this is available for some staff	5	8.5	13.9	36.1
No we do not offer this type of working hours	23	39.0	63.9	100.0
<b>Total (valid)</b>	<b>36</b>	<b>61.0</b>	<b>100.0</b>	
Missing	23	39.0		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 11 Do you offer compressed working?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes this is available for all staff	3	5.1	8.3	8.3
Yes this is available for some staff	4	6.8	11.1	19.4
No we do not offer this type of working hours	29	49.2	80.6	100.0
<b>Total (valid)</b>	<b>36</b>	<b>61.0</b>	<b>100.0</b>	
Missing	23	39.0		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 12 Do you offer job-share?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes this is available for all staff	11	18.6	30.6	30.6
Yes this is available for some staff	6	10.2	16.7	47.2
No we do not offer this type of working hours	19	32.2	52.8	100.0
<b>Total (valid)</b>	<b>36</b>	<b>61.0</b>	<b>100.0</b>	
Missing	23	39.0		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 13 Do you offer phased return to work?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes this is available for all staff	18	30.5	51.4	51.4
Yes this is available for some staff	4	6.8	11.4	62.9
No we do not offer this type of working hours	13	22.0	37.1	100.0
<b>Total (valid)</b>	<b>35</b>	<b>59.3</b>	<b>100.0</b>	
Missing	24	40.7		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 14 Do you offer voluntary reduced working time?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes this is available for all staff	18	30.5	50.0	50.0
Yes this is available for some staff	4	6.8	11.1	61.1
No we do not offer this type of working hours	14	23.7	38.9	100.0
<b>Total (valid)</b>	<b>36</b>	<b>61.0</b>	<b>100.0</b>	
Missing	23	39.0		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 15 Do you offer term-time / school hours?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes this is available for all staff	13	22.0	37.1	37.1
Yes this is available for some staff	4	6.8	11.4	48.6
No we do not offer this type of working hours	18	30.5	51.4	100.0
<b>Total (valid)</b>	<b>35</b>	<b>59.3</b>	<b>100.0</b>	
Missing	24	40.7		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 16 Do you offer home working?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes this is available for all staff	6	10.2	17.1	17.1
Yes this is available for some staff	6	10.2	17.1	34.3
No we do not offer this type of working hours	23	39.0	65.7	100.0
<b>Total (valid)</b>	<b>35</b>	<b>59.3</b>	<b>100.0</b>	
Missing	24	40.7		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 17 Do you offer career break?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes this is available for all staff	13	22.0	37.1	37.1
Yes this is available for some staff	2	3.4	5.7	42.9
No we do not offer this type of working hours	20	33.9	57.1	100.0
<b>Total (valid)</b>	<b>35</b>	<b>59.3</b>	<b>100.0</b>	
Missing	24	40.7		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 18 Do you offer temporary reduced hours?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes this is available for all staff	19	32.2	63.3	63.3
Yes this is available for some staff	2	3.4	6.7	70.0
No we do not offer this type of working hours	9	15.3	30.0	100.0
<b>Total (valid)</b>	<b>30</b>	<b>50.8</b>	<b>100.0</b>	
Missing	29	49.2		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 19 Do you offer other?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes this is available for all staff	17	28.8	70.8	70.8
No we do not offer this type of working hours	7	11.9	29.2	100.0
<b>Total (valid)</b>	<b>24</b>	<b>40.7</b>	<b>100.0</b>	
Missing	35	59.3		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 20 Have you experienced problems with employees taking up employment?**

	Frequency	Percent	Valid Percent	Cumulative Percent
A great deal	2	3.4	3.4	3.4
To some extent	5	8.5	8.5	11.9
Not very much	10	16.9	16.9	28.8
Not at all	39	66.1	66.1	94.9
Don't know / no opinion	3	5.1	5.1	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 21 Has childcare been a factor in preventing an employee taking up employment?**

	Frequency	Percent	Valid Percent	Cumulative Percent
To some extent	4	6.8	6.8	6.8
Not very much	6	10.2	10.2	16.9
Not at all	43	72.9	72.9	89.8
Don't know / no opinion	6	10.2	10.2	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 22 Does childcare need to be available at different times?**

	Frequency	Percent	Valid Percent
Available at different times	12	20.3	100.0
More flexible sessions e.g. drop ins or a few hours	12	20.3	100.0
More affordable	26	44.1	100.0
Different location	7	11.9	100.0
Childcare that is better at meeting child's additional needs or disability	9	15.3	100.0
Access to different type of childcare	9	15.3	100.0
Better quality provision	10	16.9	100.0
Other (please state)	21	35.6	100.0

**Table 23 Childcare available at different times?**

	Frequency	Percent	Valid Percent
Before 7 am	4	6.8	100.0
7 - 8am	6	10.2	100.0
8 - 9am	4	6.8	100.0
9 - 4pm	4	6.8	100.0
4 - 6pm	6	10.2	100.0
After 6pm	8	13.6	100.0

**Table 24 Childcare available at different locations?**

	Frequency	Percent	Valid Percent
Closer to home	2	3.4	100.0
Closer to work or study	3	5.1	100.0
Employer based childcare	1	1.7	100.0
Closer to child's school	1	1.7	100.0

**Table 25 Access to different types of childcare?**

	Frequency	Percent	Valid Percent
Childminder	3	5.1	100.0
Day nursery	4	6.8	100.0
Pre - school or playgroup	3	5.1	100.0
Nursery class in school	4	6.8	100.0
Crèche	3	5.1	100.0
Home based childcarer, nanny or au pair	3	5.1	100.0
Breakfast club	3	5.1	100.0
After school club	4	6.8	100.0
Holiday playscheme	4	6.8	100.0
Youth provision	2	3.4	100.0

**Table 26 Childcare required at the weekends by employees?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	14	23.7	24.1	24.1
No	44	74.6	75.9	100.0
<b>Total (Valid)</b>	<b>58</b>	<b>98.3</b>	<b>100.0</b>	
Missing	1	1.7		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 27 How will the number of employees change over the next 3 years?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Increasing	28	47.5	47.5	47.5
Decreasing	1	1.7	1.7	49.2
Stay the same	26	44.1	44.1	93.2
Don't know	4	6.8	6.8	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 28 Do you provide childcare vouchers?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Currently provide	17	28.8	29.3	29.3
Do not offer this benefit	41	69.5	70.7	100.0
<b>Total (Valid)</b>	<b>58</b>	<b>98.3</b>	<b>100.0</b>	
Missing	1	1.7		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 29 Do you provide on-site nursesey?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Thinking about providing	1	1.7	1.7	1.7
Do not offer this benefit	58	98.3	98.3	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 30 Do you provide on-site creche?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Currently provide	1	1.7	1.7	1.7
Have provided in the past but no longer	1	1.7	1.7	3.4
Do not offer this benefit	57	96.6	96.6	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 31 Do you provide on-site holiday playscheme ?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Currently provide	3	5.1	5.1	5.1
Do not offer this benefit	56	94.9	94.9	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 32 Do you provide on-site after school club?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Have provided in the past but no longer	1	1.7	1.7	1.7
Do not offer this benefit	58	98.3	98.3	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 33 Do you provide financial assistance towards childcare?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Currently provide	2	3.4	3.4	3.4
Do not offer this benefit	57	96.6	96.6	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 34 Do you provide information about childcare provision?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Currently provide	12	20.3	20.7	20.7
Do not offer this benefit	46	78.0	79.3	100.0
<b>Total (Valid)</b>	<b>58</b>	<b>98.3</b>	<b>100.0</b>	
Missing	1	1.7		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 35 Do you provide information about working tax credits?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Currently provide	16	27.1	27.6	27.6
Have provided in the past but no longer	1	1.7	1.7	29.3
Do not offer this benefit	41	69.5	70.7	100.0
<b>Total (Valid)</b>	<b>58</b>	<b>98.3</b>	<b>100.0</b>	
Missing	1	1.7		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 36 Do you provide 'other'?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Currently provide	4	6.8	12.1	12.1
Do not offer this benefit	29	49.2	87.9	100.0
<b>Total (Valid)</b>	<b>33</b>	<b>55.9</b>	<b>100.0</b>	
Missing	26	44.1		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 37 Do the cost stop you from offering childcare benefit?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	23	39.0	39.7	39.7
No	29	49.2	50.0	89.7
Don't know	6	10.2	10.3	100.0
<b>Total (Valid)</b>	<b>58</b>	<b>98.3</b>	<b>100.0</b>	
Missing	1	1.7		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 38 Does not enough staff who require childcare stop you from offering childcare benefit?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	37	62.7	63.8	63.8
No	15	25.4	25.9	89.7
Don't know	6	10.2	10.3	100.0
<b>Total (Valid)</b>	<b>58</b>	<b>98.3</b>	<b>100.0</b>	
Missing	1	1.7		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 39 Does lack of information stop you from offering childcare benefit?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	15	25.4	26.3	26.3
No	37	62.7	64.9	91.2
Don't know	5	8.5	8.8	100.0
<b>Total (Valid)</b>	<b>57</b>	<b>96.6</b>	<b>100.0</b>	
Missing	2	3.4		
<b>Total (Base)</b>	<b>59</b>	<b>100.0</b>		

**Table 40 Have you heard of DISC?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	16	27.1	27.1	27.1
No	43	72.9	72.9	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Table 41 Would you like to receive information from DISC?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	24	40.7	40.7	40.7
No	35	59.3	59.3	100.0
<b>Total</b>	<b>59</b>	<b>100.0</b>	<b>100.0</b>	

**Open ended Comments**

**Q7. What is your company's' main type of business? – 'Other'**

- Bakery
- Bicycle hire
- Business consultancy
- Catering Equipment Suppliers
- Childcare
- Clothing
- Estate agent
- Fire and security alarm
- Fitness
- Funeral directors
- Health and social care
- Leisure
- Mobile hydraulics
- Night club
- Pharmaceutical
- Property Management
- Publishing

Race course  
Research  
Residential care home  
Tourism  
Vehicle service and repairs

**Q14. Which of the following working arrangements do you offer? – ‘Other’**

Ad hoc - work when available  
Can apply to statutory rights/procedures  
Decided at interview if can offer hours depending on availability of staff  
Flexible time, but ad hoc on request.  
General flexibility in working arrangements  
Happy to accommodate any needs that may arise  
If need time off can make up hours at later date  
Informal - work when available/want to. No one has asked for a job share but we would consider it.  
Informal arrangement. We don't formally work around school hours but we do offer flexibility to individual staff to accommodate  
Informal arrangements  
No set procedure-cover when necessary  
Not set put in contracts - can come in late/early if required due to childcare needs  
People can ask line managers for different working patterns  
Set on individual basis (if time needed off then would arrange)  
Shift work  
Sit down and organise rota on a weekly basis and schedule around any problems  
Superimposed by bell curve of peak seasons for business  
Toil

**Q15. Are there any reasons why you don't offer a more flexible choice of working hours to staff?**

24/7 care in particular location with particular amounts of staff required for different care provision  
Arrange childcare around hours rather than other way round - centre has to be open at certain times so can't come in late and work later like in an office environment  
Whole place is run on volunteers who work when they are available  
Business needs  
Business constraints  
Business needs demands that our staff work set hours. We are flexible in that is an employee needs to deal with a family matter he can come in later and work later or make up the hours, so whilst it's generally 9

Due to the level of work coming through the door we need people there at set times to get the work completed.

Fit in with business needs - can't work from home as company is a restaurant

Flexible where needed but small family business that starts at 4am

For health and safety purposes employees need to be there when others are and shop floor opens at 7am.

For staff working in our shops, their hours are dictated by opening times hence it is much harder to provide flexibility.

Function of how many punters - respond to tourism demand. More tourists = less flexibility

General business constraints

Our department relatively new, trying to get statutory stuff right before writing own policies etc

It has never been relevant. We need to have staff in at set times to deal with the public and as a small business it would be hard to meet everyone's demands.

It's not applicable.

Not applicable. Amazing employers to work for - understand any problems and cater for these

Nature of business - working on peoples houses and they want a normal working pattern at normal times

Need to be in the branch or out in the vehicles between set hours to meet customer needs.

Need to have staff available when the shop is open.

Never been asked

Not been needed

Not relevant

Opening hours - meal times and room departures (between 10am and 2pm house keepers are needed)

Opening hours - trading restricted due to being a public house

Opening hours

Opening hours dictate

Opening hours of business

Opening hours, when customers are available

Pretty flexible employer

Pretty flexible in own opinion

Service delivery

Set opening times.

Set to tight deadlines governed by health and safety within governing organisation but informal flexibility (allow when situations arise)

Small company - flexible in rota but no formal arrangements

Small company

Small company with set working hours (8-5)

Start at 8am, but only when busy periods will a more strict approach be taken regarding working hours

Try and accommodate where possible

We are a very small team and very flexible but your definitions are overly complicated for what actually happens- our simple flexibility works incredibly well.

We can not offer working from home due to the nature of the business.

We have set lesson times for classes so the instructors have to be here.  
We have set opening times so we need staff in at those times.

**Q18. What improvements do you think are needed to childcare to help improve recruitment and retention of staff? 'Other'.**

Availability in school holidays  
Emergency childcare cover  
Most staff have wives who look after children  
Non pupil day cover  
School holidays a big issue  
To not be penalised by childcare for being late.  
Transport from school to after school provision

**Q24. Childcare benefits. 'Other',**

Can bring children in to work if needed to if no childcare available  
Hours that are 10-3 to cater for school hours  
Rotas around what people can do

**Q29. Do you have any additional comments or suggestions about childcare provision and your business?**

Care service - if someone comes to interview and cannot find cover for their own childcare may not employ them. Cost of childcare for workers especially during school holidays makes it not worth working for some staff.  
Cater for the employee that has a child by allowing them to work on flexi time so that they can provide childcare themselves during these times  
childcare at short notice can cause problems for employees.  
Childcare benefits etc are decided by head office (part of larger chain)  
Childcare provision is seen as generally quite good in the area.  
Doesn't affect business  
Emergency childcare is a problem.  
Have lost 2 great members of staff due to the fact that they could not get sufficient childcare cover. In addition, the local nursery is fully subscribed and so more provision is needed.  
Haven't come across need to provide childcare benefits but would look in to it if necessary  
I can see the advantages of offering staff flexible hours and it works well to keep them happy.  
I wonder if the lack of financial help for staff affects the quality of childcare they can get.  
I would like to help  
If a member of staff needs childcare at short notice this can be a problem. Sometimes they have to phone in and request a day off as holiday.  
If childcare became an issue for staff then we would look into resolving the problems via the correct avenues. It has never been an issue which is why we have no procedures or flexible working hours in place.

If someone wants to work they will work and can sort out their own childcare.  
Zero tolerance for lazy

It's good that the research is being conducted.

It worries me that staff do not get helped out enough financially with the cost of childcare and the effect this might have on staff wanting to leave employment with me.

Majority of workers operate on volunteer basis so work when they can. Workers are mainly elderly or retired and charity operates on a donation basis. Cannot offer any childcare benefits due to this.

Male dominated business so not an issue. Small enough company to be flexible when childcare issues arise. Most workers have wives who work part time and look after their children

Most employees schedule work so that either they or their partner are providing childcare while the other is at work. Staff don't abuse the fact they require childcare and fit in with the company working hours.

My staff often complain that they do not get enough help with the cost of childcare.

Our staff have no concerns with this.

Not applicable at moment but would consider as and when required (1 parent on maternity cover at present - return in November)

Not been an issue for the company. While a number of staff have children they do not require childcare benefits from the company

Not had to look in to childcare provision as no staff have young children. Company employs middle aged staff and caters for middle aged clients.

Only childcare issue is the cost. Otherwise the provision appears to be generally good within the area.

Our policies are currently under review. We like to ensure we are up to date.

Quite good childcare within the area. Feels that childcare involves too much paperwork and that childcare provision is a very important part of any business

These issues are sent through post to personnel department

Small business that does not have anyone that requires childcare. Does not know what improvements are needed to be improved as does not affect company

Small companies require information on how to provide services to employees and this should be really pushed/advertised as can be hard to know where to look for it.

Small family bakery - start work at 4am and so if someone needs childcare support people just don't work for them due to working hours. Only offer minimum wage or just above and so not worth people working for them if they need childcare due to costs.

Small family business and so wife covers childcare. When she works parents help.

So flexible when it comes to children. Individual child minders have followed letter of the law but have not necessarily been nice people.

The company try to review all policies on a regular basis.

The cost of childcare is so high it prevents Mums getting back into the work place. There is little or no help available.

The cost of childcare means that it is not worth working if someone requires childcare. Offering childcare benefits is not relevant as only 1 member of staff has a young child and they manage it themselves.

The crèche we offer is for customers but staff can piggy back on that. The main factor preventing us doing more for staff is cost.

Very flexible - can bring children in to work if needed as a small hotel business

We review how we can help staff with issues such as childcare on a regular basis.

We try and be as flexible as we can because we know that it helps our staff out.

We will obtain information for people as best we can. Operate with a family friendly policy within staff handbook and so accommodate as best they can. People can ask for different working patterns as and when required from their line managers

Workers with children tend to work weekdays and students etc come in and work on weekends so that childcare is not an issue at weekends.

Yes! Please accept that childcare is not always a problem issue. Please accept that employers are capable of helping out and dealing with the issues. We regularly review our procedures and so do not have any problems in this area. We go out of our way to go beyond the minimum requirement of what is expected of us.

## **Interview Schedule:**

**Hello**

**I'm calling from Bournemouth University on behalf of Devon County Council please can I speak to the person in charge of recruitment and retention of staff?**

**Hello - My name is ..... and I'm calling from Bournemouth University. We are undertaking a piece of research on behalf of Devon County Council. We are seeking employers views of childcare in the local area by conducting telephone surveys with a random selection of companies in the Devon area. This is contributing to a wider childcare sufficiency assessment which is looking at the supply and demand of childcare in Devon.**

**Would you be able to spend ten minutes either now or at a more convenient time completing a survey over the phone? If yes - continue with interview If no - thank them for their time and say goodbye If at another time - arrange a time to call back and take the name and direct telephone number of the person**

Record name, direct telephone number and more convenient time here

**Anything you say in this interview will not be assigned to you individually. We are consulting with 50 businesses across Devon and all results will be amalgamated. For quality control purposes I would like to record your responses to the survey. Do you give your consent for this interview to be recorded.**

**If yes - press record If - No - carry on with interview but make sure all responses are recorded accurately.**

## Devon Employer Research Survey 2010

I should take up no more than ten minutes of your time. If there is any question that you do not wish to answer please say and we will move on to the next question.

### Employer Information

Firstly I'm going to ask you a bit about your company and it's workforce.

**Q2** Business name

**Q3** Business Address

**Q4** Business Postcode (for area analysis only)

**Q5** Business Telephone Number

**Q6** What sector is your company in? (private, public or 3rd sector)

**Q7** What is your company's' main type of business?

Agriculture	Wholesale and retail
Manufacturing	Construction
Hospitality/catering industry - Hotels/Restaurants/ Pubs/Cafe Finance	Real Estate Other

If other please state

**Q8** How many people do you employ? (Please tick one box only)

1 - 4 employees / 5 - 10 employees / 11-25 employees / 26 – 50 employees /  
51-100 employees / 101-200 employees / 201+ employees

**Q9** How many of your employees work under 16 hours a week? (Please tick one box only)

None / 1 - 4 employees / 5 - 10 employees / 11 - 25 employees / 26 - 50 employees /  
51 - 100 employees / 101 - 200 employees / 201+ employees / Don't know

**How many of your employees work over 16 hours a week? (Please tick one box only)**

None / 1 - 4 employees / 5 – 10employees / 11 - 25 employees / 26 - 50 employees / 51 - 100 employees / 101 - 200 employees / 201+ employees / Don't know

**Q11 Approximately what percentage of your workforce is female?**

**Q12 Approximately what proportion of your workforce are parents with children aged 14 years or under? (If don't know please write in "not sure")**

**Q13 Do you offer any flexible working arrangements to your staff?**

Yes            No our company only has fixed working

Hours

**Q14 Which of the following flexible working arrangements do you offer? (please tick all that apply)**

Flexi time

Annualised working

Compressed working including nine day fortnight

Job - share

Phased return to work

Voluntary reduced working time

Term-time/school hours

Home working

Career break

Temporary reduced hours

Other (please state)

If other please state

**Q15 Are there any reasons why you don't offer a more flexible choice of working hours to staff? (prompt - opening hours of business, business constraints. )**

## Recruitment & Retention

**Q16 To what extent have you experienced problems with employees taking up employment with you or continuing to work for your organisation? (Please tick one box only)**

Don't know / No / A great deal / To some extent / Not very much / Not at all / No opinion

**Q17 To what extent has childcare been a factor in preventing an employee taking-up employment with you or continuing to work in your organisation? (Please tick one box only)**

Don't know / No / A great deal / To some extent / Not very much / Not at all / No opinion

**Q18 What improvements do you think are needed to childcare to help improve recruitment and retention of staff? (please tick all that apply)**

Available at different times

More flexible sessions e.g. drop ins or a few hours

More affordable

Different location

Childcare that is better at meeting child's additional needs or disability

Access to different type of childcare

Better quality provision

Other (please state)

**Q19 If you mentioned available at different times - which times? (Tick all that apply)**

Before 7 am

7 - 8am

8 - 9am

9 - 4pm

4 - 6pm

After 6pm

**Q20 If you mentioned other locations - which? (Tick all that apply)**

- Closer to home
- Closer to work or study
- Employer based childcare
- Closer to child's school
- Other

If other please state

**Q21 If you mentioned access to different types of childcare - which? (Tick all that apply)**

- Childminder
- Day nursery
- Pre - school or playgroup
- Nursery class in school
- Crèche
- Home based childcarer, nanny or au pair
- Breakfast club
- After school club
- Holiday playscheme
- Youth provision
- Other

*If other please state*

**Q22 In relation to working hours of the employees from your company is there a need for childcare to be available at the weekends?**

- Yes
- No

**Q23 Over the next three years do you see the number of employees working at your company increasing, decreasing or staying the same? (please tick one option)**

Increasing / Decreasing / Stay the same / Don't know

## **Child care benefits in your workplace**

**Q24 I'm going to read a list of childcare benefits, please can you tell me if you Currently provide them, Thinking of providing them, Used to provide them Do not provide them**

Childcare vouchers / On-site nursery / On-site crèche / On-site holiday play scheme / On-site after-school club / Financial assistance towards childcare / Information about childcare provision / Information about working tax credits and childcare element / Other (please state)

**Q25 Do any of the following stop you from offering childcare benefit for your staff?  
(please tick all that apply)**

The cost

Not enough staff have children who require childcare

Lack of information on how to implement childcare benefits

**Q26 Do you know that Devon has a family information service called DISC which can offer employers advice on Childcare benefits?**

Yes / No

**Q27 Would you like to receive information on DISC and the service they provide?**

Yes / No

**If yes do we have permission to pass your details onto DISC? (These will not be linked to your answers to this survey)**

**Q28 How would you like this information to be provided?**

Post

Telephone

Email

*If email please write in here*

*If post who to address it to?*

## **Additional Comments and Suggestions**

**Q29 Do you have any additional comments or suggestions about childcare provision and your business?**

**That's the end of the survey. Do you have any questions? Thank you for your time we really appreciate your help with this research.**