



the Front Project



WORK AND PLAY

Understanding how Australian families experience
early childhood education and care

Having recognised the need for a deeper and more nuanced understanding of families' needs, choices and experiences regarding ECEC, the Front Project engaged Heartward Strategic to undertake a program of primary research with parents of children aged 0–5. This report presents the findings of that research.

Heartward Strategic is an independent social research consultancy, providing socially minded, evidence based strategic guidance. Heartward's qualitative, quantitative and hybrid primary research brings real voices to decision-making, creating new insights to solve complex problems.



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FOREWORD FROM THE CEO



Jane Hunt, CEO,
the Front Project

This research elevates a key voice on an issue of critical importance to so many Australian families, and indeed, to all of us.

The Australian Early Childhood Education and Care (ECEC) sector is a significant part of the fabric of Australian family and community life, and the economy. If we didn't know this already, it became strikingly clear during 2020, as we experienced restrictions to access.

Each morning, in millions of Australian households, mums, dads (and many grandparents and other carers) head out the door and engage with some type of ECEC service. The Australian ECEC sector is vibrant and complex, with different services and settings featuring across our suburbs and towns around the country. This diversity creates a rich array of offerings for families to engage with and choose between. However, it also creates complexity in navigating the system.

In recent years there has been increased attention on children's earliest years, and the role and value of ECEC services. Policymakers, political decision-makers and ECEC sector leaders have all had something to say.

However, at the Front Project, we felt there was one key voice missing – that of families – those who use, or choose not to use, the system and experience its benefits and challenges first-hand.

Parents with children aged 0–5 years must make decisions about ECEC offerings on behalf of their children and their family in a complex mixed-market environment. With some children spending up to five years in ECEC prior to starting school, these are actually big decisions in relation to their child's growth and development that impact children across their lifespan.

So, what do families think about ECEC services in Australia? What do they value? How do they make decisions? How do they feel during this process? What do they think about costs and access? How do they determine quality? Are their needs being met? Do they think the system needs to change? If so, why? And in what direction? Do they think the system needs greater attention from government or greater investment?

The questions are endless.

That's why we asked Heartward Strategic, an independent social research consultancy, to ask Australian families these very questions.

We see great value in bringing the voices of these families to the public debate on ECEC and see the findings as an integral piece of the puzzle in understanding what's working and what's not, and for whom.

These voices are vital to addressing system challenges and progressing ECEC policy reform – for the benefit of these families and others like them, and ultimately, for us all.



Jane Hunt
CEO
The Front Project



A photograph of a woman with long dark hair and glasses, wearing a dark blue shirt, leaning over two young children. The children, a girl with blonde hair and a boy with brown hair, are looking down at a large green leafy plant. The background is a garden with various plants and a straw hat. An orange banner with white text is overlaid on the bottom right of the image.

EXECUTIVE SUMMARY AND POLICY IMPLICATIONS

EXECUTIVE SUMMARY

VALUE OF ECEC

This research highlights the important role ECEC plays in the lives of many Australian families and tells us much about what these important users of the system think, feel, need and value.

The research found that parents clearly see ECEC's value in providing an environment of support and growth and setting children up for success, at school and beyond, with this belief strengthening as their children approach school age.

ECEC also enables parents to engage in other responsibilities – primarily work, but also study/retraining, looking for work and caring for others, and this was also a core reason participating parents engaged with the system. However, on reflection, they could also identify numerous important benefits that accrue to the whole family of a young child in care and education, such as less stress, reduced financial pressure, smoother family rhythms, better mental health and wellbeing and improved family relationships. The COVID-19 pandemic and related restrictions highlighted to parents just what value ECEC provides to the whole family.

CHALLENGES AND BARRIERS

The research found that, for many parents, the journey of engaging with ECEC can be confusing and stressful. Many do not experience a sense of free choice in relation to decision making, despite the apparent existence of alternatives. The initial decision of whether and when to return to work can be driven by financial necessity, and for many workers, their sector, job type or workplace may result in a narrow range of care and education types from which to choose. When this is combined with oversubscribed services, long waitlists and other children in the family already in ECEC, children can end up being placed in a service that was not a parent's first choice, or even their second or third.

This lack of autonomy can be particularly challenging for parents, given they are invested in securing the best care and education for their child, while navigating a complex emotional landscape, including guilt, anxiety and confusion.

Governments, the ECEC sector as a whole, as well as ECEC providers, would benefit from considering parents' perspectives, and the dilemmas many face.

As well as availability and access, parents also reported barriers in terms of affordability, with many agreeing that cost was prohibitive. Parents would welcome greater government attention and action on this issue.

In determining what type of care/education and which provider they would prefer, parents understandably value quality. However, parents do not feel in a good position to be able to define and evaluate it. Instead, they assume, almost expect, that in Australia there is strong oversight of the sector, resulting in a minimum standard of care and education and an assured level of quality, regardless of service provider or cost. In this research, only some knew of the National Quality Framework and few sought it out.

From the perspective of parents there is room for a reliable source of standardised quality information. Indeed, there can be fundamental knowledge gaps among parents about service types, and how to navigate the system, including the Childcare Subsidy (CCS).

Access to care and education at the time it is needed, and for the hours/days required, is a major and ongoing issue for many families. Parents can feel greater stress and fear right at a vulnerable time of life as they face the possibility that care may not be available.

This research draws clear links between workforce participation and the availability of affordable, quality care when needed, with parents delaying returning to work, reducing their hours, stagnating in their careers, changing to jobs below their previous level, shifting to more family-friendly sectors or having to re-train, just to make family and work, work.

There is evidence too that ECEC costs impact important choices for some families, including decisions about having more children.


Given access issues and the inherent inflexibility of most types of ECEC, parents are often faced with the challenging circumstance of an inadequate amount of service availability. Significant adjustments must then be made in terms of their work, their home, their schedule, or their transport, and families may still need to use two or more arrangements at once, to enable them to match work with care and education. This can be disruptive for children, places stress on parents and impacts family quality of life.

It is unsurprising then that parents of 0–5-year-olds support measures to address some key challenges in these areas.

The research shows parents have an appetite for government intervention in the sector, to ensure that care and education are available as and when needed, and for the amount of time that is required, for the benefit of children and their families.

SUMMARY

Overall, the message is clear, parents overwhelmingly recognise the value of ECEC, with many seeing ECEC services as integral to their own and their children's wellbeing and development, and to family life. However, many believe the system has room for improvement, citing access, affordability and choice as key issues. Families would welcome greater government attention and intervention in the sector, to ensure services were available and affordable when and where they were needed, and also to support and empower them in their decision making, including in identifying quality.



Overall, the message is clear,
parents overwhelmingly
recognise the value of ECEC.

ABOUT THE RESEARCH

Having recognised the need for a deeper and more nuanced understanding of families' needs, choices and experiences regarding ECEC, the Front Project engaged Heartward Strategic, an independent social research consultancy, to undertake a program of primary research.

The project was designed to address the following three research questions:

1. Why and how are families choosing to engage with ECEC?
2. What are families' experiences of ECEC?
3. How can the system be designed to provide a more meaningful user experience?

Research with parents of children aged 0–5 years (not yet at school) was conducted to explore families' needs, choices and experiences regarding ECEC. The research was conducted in February – March 2021.

It comprised a **quantitative survey** (responded to by 1695 parents), and **qualitative research** (bulletin board, narrative interviews and a co-creation session) with 26 users and non-users of ECEC.

KEY FINDINGS

HOW AND WHY FAMILIES ARE CHOOSING TO ENGAGE WITH ECEC



The **value of high quality ECEC was widely recognised** by parents. 83 per cent agreed that 'high quality ECEC gives children a good start for school and beyond'.



Parents were quick to identify that **benefits of ECEC accrue to the whole family**, not just the child, and extend beyond the monetary benefit of income earned while young children are in education and care. 77 per cent agreed that 'access to ECEC services is important for the mental health and wellbeing of the whole family'.



Care and education was commonly used by parents, with formal ECEC dominating. Of parents surveyed, 78 per cent were currently using a form of care and education for their child 0–5 years, 70 per cent paid care, 69 per cent formal ECEC (exclusively or in combination with other arrangements; combinations were common and used by 31 per cent of all using some form of education and care).



Pre-school and centre-based care were more commonly associated with a range of benefits than were other care and education types.



Parents of younger children (aged 0–1) tended to value safety, access and work-related needs.



Parents of older children (aged 4–5) were more focused on child education and the need for routine and structure.

FAMILIES' EXPERIENCES OF ECEC

- The journey taken by parents when deciding on care and education was frequently described as stressful and was seen as having five stages:



- Parents felt they had little genuine choice, despite the apparent array of care and education options inside and outside the formal ECEC system, once affordability, lack of available places, misalignment with the support they needed to work, or lack of accord with their beliefs or values, were taken into account.
- Although the ECEC system overall was well regarded, many struggled to define and identify 'quality'. It was most consistently seen to relate to staff being well-supported, which is difficult to discern as a parent choosing services.
- 83 per cent of parents agreed that **ECEC educators and carers have a significant impact on young children's learning and wellbeing**, with widespread support (72 per cent) for the importance of this workforce being better reflected in their working conditions and pay.
- Issues around flexibility and accessibility can 'tip the balance' in favour of a parent delaying their return to work or result in families securing inadequate or less than ideal education and care arrangements not fully meeting needs.
- Parents in the research were calling for improved access (affordability and places) and flexibility in the system, so that ECEC can better meet their needs and the demands of the workplace.
- Highlighting issues with access and flexibility, among those parents using paid care and education:
 - 52 per cent agreed that once the cost of care is factored in, it's hardly worth working
 - 47 per cent agreed that they have had to make financial sacrifices to afford care
 - 43 per cent agreed that they've had to change work arrangements to fit in with the service they could find/afford.
- 73 per cent of all parents agreed that **high ECEC costs are a barrier to some families having (more) children**.
- Generally, parents felt that their care and education **needs were not being fully met**. Family support (parents being able to work/find work/study/provide care/rest etc.) and access (availability of affordable ECEC for days/hours needed in a suitable location) were needs comparatively poorly met across ECEC settings.

SYSTEM DESIGN AND REDESIGN



I don't really remember any party really pushing the education/childcare piece in public. I think if they did they would clean up on family votes, especially if their plan is to make childcare more affordable, all that money will be poured back in to the economy one way or another.

BOARD PARTICIPANT — USER OF ECEC

- There was strong agreement that the existing system needs to change; 85 per cent agreed the early childhood care and education system needs to change to better support parents to work and/or enable more children to access quality education and care.
- The research also suggested that **parents would like to see government intervention** to help ensure:
 - care and education fees (prior to any subsidies) remain 'realistic'
 - a good geographic spread of services are available to parents
 - that there are centres with very extended opening hours with potential weekend options.
- For **addressing access and flexibility issues**: strongest support was revealed for more types of care attracting the Childcare Subsidy (CCS) (76 per cent), and the top level of CCS being increased (65 per cent).
- For **ensuring quality and transparency**: through discussions, parents noted that there should be mechanisms in place to ensure consistent, high quality across all ECEC services. Where this was not entirely possible, transparency around how services differed and what service fees included was considered essential, to allow for comparison across service types and individual service providers.

ROLE OF PRE-SCHOOL/KINDER



...childcare almost is like a slow introduction to ... socialisation, I guess it's also the education like you're learning how to learn, you're learning how to pay attention, you're learning how to take direction from people that aren't your parents or just in general, yeah, you're learning how to sit at a table, lots of things like that... getting ready for school, yeah, it'd be such a shock to go from nothing to that.

MOTHER OF TWO-YEAR-OLD, SINGLE PARENT, 25-29 YEARS,
LOW INCOME, METROPOLITAN AREA

- Parents overwhelmingly supported universal access to pre-school for at least the year before school (87 per cent of parents surveyed).
 - 82 per cent agree that government funding should support a single year of free subsidised pre-school
 - 72 per cent agree that government funding should support two years of free or subsidised pre-school.

POLICY IMPLICATIONS

This research cuts through the noise about ECEC, to ask Australian families about their experience of what's working and what's not, and what should change. This provides policymakers and political decision-makers, and the ECEC sector itself, with valuable insights to guide their thinking on these issues.

Among the findings are a number of flags and signposts for policy consideration and change. Some of these are big picture public policy issues, for consideration by the State/Territory and Australian Governments, while others speak to 'policy' in a more applied and local sense, for consideration by the ECEC sector, providers and others with a stake in the system.

For government, the research signals several opportunities to respond to parents' concerns about access, cost and choice through building on the existing ECEC policy infrastructure. Some small changes may allow the system to better meet families' expectations around ECEC and empower families in their engagement.

IMMEDIATE OPPORTUNITIES FOR GOVERNMENT

On costs and affordability

The Australian Government could explore taking on a stronger role as a market steward, to ensure the out-of-pocket costs for parents remain 'realistic'. As a starting point, Government could direct the Australian Competition and Consumer Commission (ACCC) to investigate ECEC pricing and the market. The Australian Government could also consider increasing the Child Care Subsidy for families in lower-income households.

On availability

The Australian Government could consider playing a stronger role in ensuring ECEC services are available and accessible to families – both in terms of geographic location, places available and opening hours, days and patterns of access (e.g. weekly vs fortnightly).

On choice and quality

The Australian Government could better equip parents with a way of discerning quality early learning to support their decision making around services. This could be done through promoting the existing National Quality Framework or exploring other ways to communicate indicators of quality to families. It could also find new ways to help parents choose a service that meets their needs, such as by updating the Child Care Finder website with timely information on hourly rate caps, daily costs, quality of services and including standalone preschools/kindergarten services.

On preschool/kinder

The Australian Government could contemplate steps to implement access to two years of preschool for all Australian children.

State/Territory Governments could advocate for two years of preschool/kinder for all children and work co-operatively with other jurisdictions and the Australian Government on a consistent, secure national funding framework for preschool/kinder.

For the ECEC sector and providers, the research signals a need to listen to families and parents and consider how services could better meet their needs. For the sector, this could mean providing more information to parents about ECEC services, different options and their pros and cons, and how to determine quality. For providers, this could be taking steps to improve the first contact phase of a parent's engagement with a service, and listening to, and working with families in their community to better meet their needs.

GLOSSARY

Throughout this report the following terms and definitions have been used for the different types of education and care arrangements available to parents in Australia.

Centre-based/Long day care

Sometimes referred to as just 'childcare'. Some centres may also offer a pre-school program within the day care centre. This does not include occasional care services such as holiday, creche, and out of school hours care services.

ECEC

Early childhood education and care services offered in Australia: preschool/kinder, centre-based/long day care and family day care. It excludes home-based paid and unpaid care, parental care at home, and excludes education and care services for school-aged children, such as out of school hours care.

Family day care

Where a professional carer looks after children in the carer's home.

Home-based paid care

Provided by an individual whose time you pay or compensate for, such as a nanny or au pair. This does not include occasional paid care such as baby-sitting.

Home-based unpaid care

Provided without payment, such as by a family member or friend. This does not include care provided by parents/guardians or occasional unpaid care/babysitting.

Parents

Individuals who participated in qualitative and quantitative research components who are parents of children aged 0–5 years not yet at school.

Parental care at home only

Children exclusively being cared for at home by their parent/guardian without any other regular care/education.

Preschool/kinder

Preschools or kinder for three- to five-year-olds, separate to a long day care centre, usually running during school hours and during school terms. i.e. through community kindergartens, independent or government schools.



FINDINGS

WHY AND HOW ARE FAMILIES CHOOSING TO ENGAGE WITH ECEC

This section sets out research findings relating to parents' needs, and the subsequent choices they make in relation to the education and care of their children not yet in school.

The research explored the needs that are driving parents towards the use of education and care services for their young children, the perceived benefits of different types of education and care (including ECEC, as well as other arrangements) and the factors keeping them away or preventing them from accessing ECEC services.

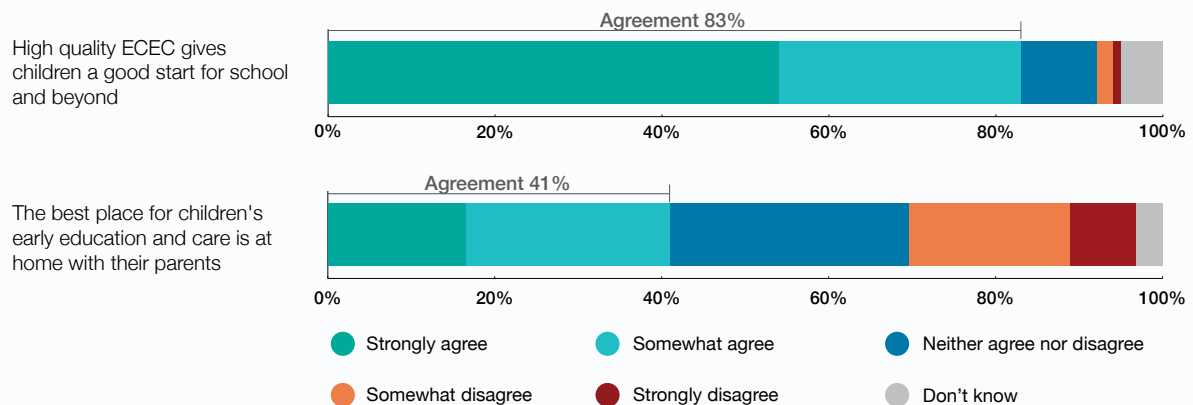
PERCEIVED VALUE OF EDUCATION AND CARE SERVICES

As Figure 1 shows, parents in the study widely recognised the value of high quality ECEC.

Just over half (54 per cent) strongly agreed that 'high quality ECEC gives children a good start for school and beyond', with a further 29 per cent somewhat agreeing, resulting in 83 per cent total agreement.

Half as many agreed (just 41 per cent total agreement) that, in contrast, 'the best place for children's early education and care is at home with their parents' (16 per cent strongly agree, 24 per cent somewhat agree).

Figure 1. Broad perceived value of ECEC



Question: And to what extent do you agree or disagree with each of these statements about ECEC?

Parents in the qualitative research highly valued the formal ECEC system and identified numerous benefits of education and care during early childhood including; independence, socialisation and other areas of development, as well as a sense of stability, rhythm and context that will prepare them for later years.

The sheer range of activities and explicit focus on the needs of children that characterises care and education services, is, for many parents, a step beyond what they feel capable of offering.

“

...it's an expense I'm willing to pay for because I think the benefits outweigh the fact that you have to pay some money, and although it is expensive, I do feel like it's worth it... especially as they get older, they demand a lot more stimulation and they deserve a lot more stimulation as well, it's hard to do that at home even now with a toddler... I think there's so much more benefits from hanging out with kids their age and the educators' sole purpose in the day is to stimulate and educate and entertain them, so I think she has so much more fun in a day care situation than a day at home, even if we do do fun things, I'm not doing as fun things as the educators are. I'm not getting my paints out and painting, it's too much mess for me.

MOTHER OF TWO-YEAR-OLD, SINGLE PARENT, 25-29 YEARS, LOW INCOME, METROPOLITAN AREA

“

We think childcare is way undervalued, I mean we're not millionaires by any sense, but we just think based on what we pay, it's incredible value for money, we love what the centre has done for our kids and how it's been helpful...

FATHER OF FOUR-YEAR-OLD, 35-39 YEARS, MIDDLE INCOME, REGIONAL AREA

“

...my 3 year old definitely has gained lots of confidence with people her own age and peer-wise...she knows how to appropriately interact with them, and toilet training, has been a struggle with us for her, and recently through childcare she has been doing so well perhaps because the educator is toilet training another child at the same time and has more focus on it than perhaps I do...

MOTHER OF THREE-YEAR-OLD, 25-29 YEARS, LOWER-MIDDLE INCOME, REGIONAL AREA

Parents were also quick to identify benefits of ECEC that accrue to the whole family, not just the child in care, and these benefits extended far beyond any monetary benefit of increased income earned while young children are in education and care.

HOW PARENTS DEFINE EDUCATION AND CARE NEEDS FOR THEIR 0–5-YEAR-OLD CHILDREN

The survey presented parents with a list of 19 possible needs across seven domains associated with young children's education and care, based on previous research that identified what needs ECEC can support.

The seven domains and their associated needs, which were derived from the initial stages of this research, are detailed in the following table

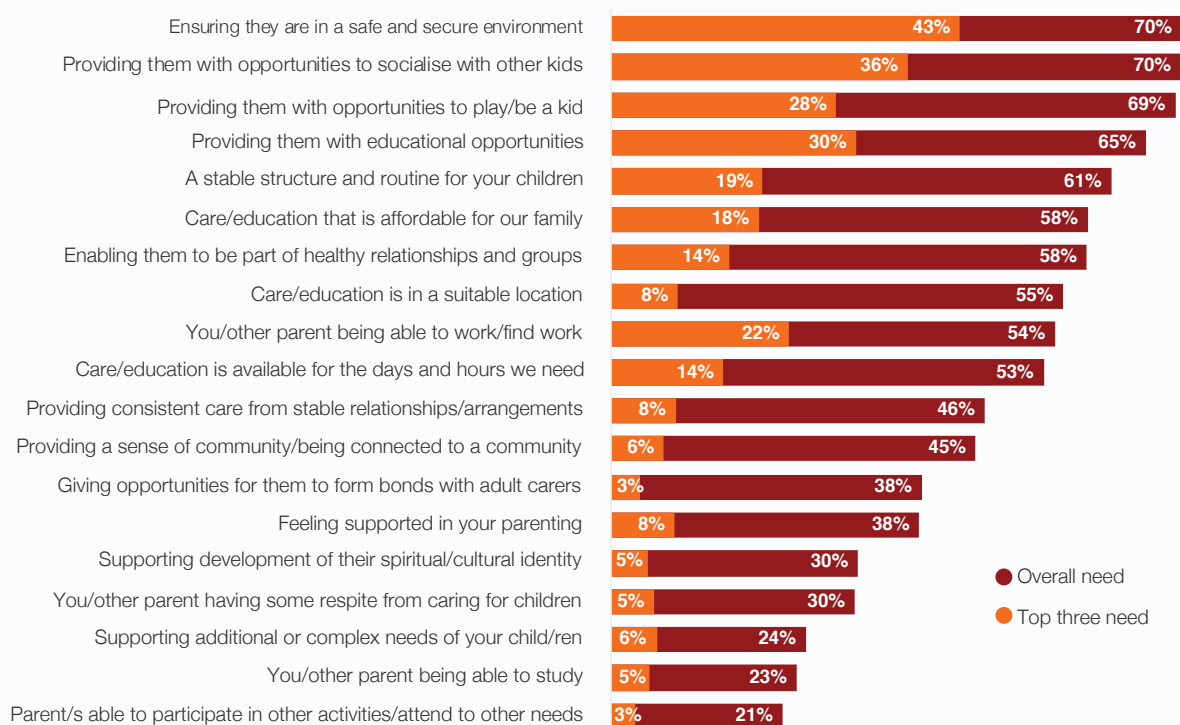
Need domains in ECEC		Specific needs associated with domain
	Safety A safe and secure physical environment	Ensuring children are in a safe and secure environment
	Belonging and connection Healthy bonds/relationships and a sense of community	Giving opportunities for children to form bonds with adult carers Enabling children to be part of healthy relationships and groups Providing a sense of community/ being connected to a community
	Growth Development through play, education, socialisation, culture	Providing children with opportunities to play/be a kid Providing children with opportunities to socialise with other kids Providing children with educational opportunities Supporting development of children's spiritual/ cultural identity
	Stability Consistent structure, routine and caregivers/ educators	A stable structure and routine for children Providing consistent care from stable relationships/arrangements
	Family support Enabling parents to work/find work/ study/provide care/rest etc.	Parent/s being able to work/find work Parent/s being able to study Parent/s having respite from caring for children Parent/s being able to participate in other activities or attend to other needs (e.g. caring for other relatives) Feeling supported in parenting
	Additional support Support for children with additional or complex needs	Supporting additional or complex needs of child/ren
	Access Availability for days and hours needed at an affordable cost in a suitable location	Care/education is available for days and hours needed Care/education that is affordable for the family Care/education is in a suitable location

From the list of needs, parents were asked to select those most important to them when thinking about the care and education of their children. Following this, they were asked to identify their top three current needs from the list they selected. The findings from these two survey questions are shown in Figure 2.

The four most important needs for parents overall when it comes to the education and care of their 0–5-year-old children centred around domains relating to the child’s safety and growth (see Figure 2 for more detail).

One in five parents (22 per cent) cited parental needs ‘to work or look for work’ as one of their top three current education and care needs.

Figure 2. Needs associated with children’s education and care (most important and top three)



Question: When it comes to the care and education of your child/ren aged 0–5 years who is/are not yet at primary school, which of these are important to you right now?; Of these important needs, now please select the top 3 important to you.

The findings from the qualitative research suggest that, as a need, ‘family support’ (e.g. being able to work), and particularly ‘you/other parent being able to work/find work’, may have been underreported in the survey.

For many of the parents participating in the qualitative research, the need for education and care to support parental workforce participation was fundamental.

This was the core reason that some had expected to secure education and care for their child, assuming they would need it to continue working. As a result, many skimmed over the need to return to work as a need or consideration when selecting a specific service, and quickly jumped straight to child-oriented, rather than workforce/parent-oriented considerations.

In terms of child-oriented needs, some who originally thought they would favour being home with their child for many of the years prior to primary school commencing, spoke of the realisation that their child would benefit from greater socialisation, the building of greater independence by being away from their primary care givers, and a level of stimulation that they did not feel themselves equipped to provide.

Some with very young children (including under 1-year-old) felt their return to the workforce was premature, but something that was required as their parental leave ended. These parents tended to need a care and education option that enabled their child to receive an approximation of the care they would otherwise receive at home, including enough one-on-one attention from a consistent carer, in an environment that would not overstimulate, and in which they would eat well and sleep well and be otherwise safe and secure.

Child-oriented needs became particularly prominent for those with older children (usually, 3–5 years), which coincides with the period when children can more clearly express their preferences and experiences and when behavioural or developmental difficulties come to the surface that can increase the need for additional support in ECEC.

By this stage, most parents had long since returned at least to part-time work and had established a routine of education and care usage. A common need expressed by parents at this stage was for education and care to prepare their children for school, socially and developmentally. These factors can prompt a re-evaluation of ECEC at around age 3.



[My 3 year old] will go to a preschool next year and, not to speak ill of our childcare educator, but that is because she just simply doesn't have the time to run through a preschool programme with them and we do think that it is beneficial for our kids at least to have that stepping stone as some of our children have been quite reserved socially, so being in a bigger group of 20 plus kids is actually really beneficial for them so that they are not super overwhelmed on their first day of kindergarten.

**MOTHER OF THREE-YEAR-OLD, 25–29 YEARS, LOWER-MIDDLE INCOME,
REGIONAL AREA**

The ways in which care and education services support the whole family, beyond the actual child in education and care, were most salient for those with younger children 2 and under, as parents considered how their education and care options would fit in with their return to the workforce (including by way of affordability and flexibility), and also for those considering use of sessional pre-school/kinder, and working through how they would manage school hours, without (for many) out of school hours care.

HOW PARENTS VALUE EDUCATION AND CARE SERVICES, BY FAMILY NEEDS AND SERVICE TYPE


Perceived value of each education and care service type was also explored across the seven categories of ECEC benefits.

As illustrated in Figure 3, overall, safety, stability and family support were the benefits most consistently associated with education and care.

Safety was most commonly associated with no paid care (parent-at-home; 65 per cent mentioning this as a benefit of this education and care arrangement), stability most commonly associated with pre-school (58 per cent) and family support most commonly associated with home-based unpaid care.

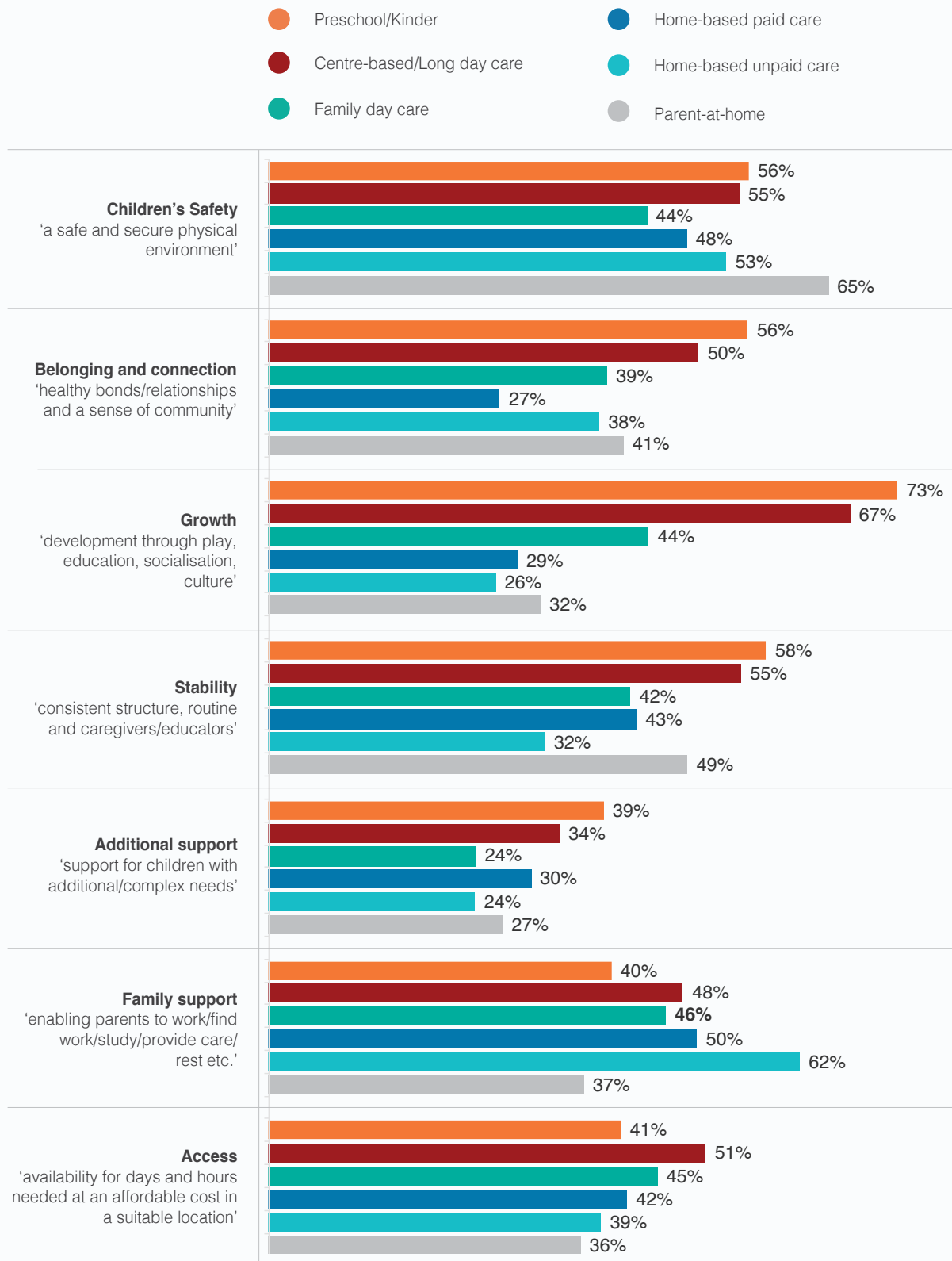
While strongly differentiating between education and care types, growth attracted the strongest associations, being most commonly associated with pre-school (73 per cent) and centre-based long day care (67 per cent).

Pre-school was the education and care type most commonly associated with six of the eight benefits. However, pre-school/kinder was the education and care type least associated with family support (40 per cent compared to 48–62 per cent) and was less commonly associated with access (41 per cent) than other setting types.



Safety, stability and family support were the benefits most consistently associated with education and care overall.

Figure 3. Benefits associated with different types of education and care



Question: Based on your own opinions, which of the listed potential benefits do you associate with these different types of early childhood education and care?

WHY PARENTS USE DIFFERENT TYPES OF EDUCATION AND CARE SERVICES

Parents in the qualitative research spoke of the relative strengths and weaknesses of different care and education types, the reasons for their use and their capacity to meet specific needs.

Preparedness to put children in larger, **centre-based care** arrangements increased with higher child age, due to perceived relative strengths for socialisation, growth and development, structure and school readiness. Some also favoured centre-based ECEC due to beliefs about greater oversight and accountability, compared to family day care or informal paid care. Overall centre-based care was synonymous with ECEC, being more salient than other forms of paid care for those many parents who had not considered options such as family day care or a nanny.

For older children, and particularly families not yet using ECEC, **pre-school/kinder** was considered preferable to long day care when considering only the child's needs. Some believed the educational component of education and care to be of higher quality, even where a long day care centre runs a pre-school program (others disagreed or were unsure either way), would result in better school preparedness (more closely approximating the school environment) and the shorter hours preferable for children (including so that they do not become over tired).

Families already using long day care typically reported keeping their child in that service rather than shifting them to preschool/kinder where they were happy with their existing service, and/or where they could not consider an education and care arrangement that only covered school hours, due to their work arrangements.

It should be noted that even some that did not technically need long hours of care (e.g. for work or study), greatly valued the flexibility offered by longer hours, allowing them to more easily complete life's tasks without the complication of having a young child in tow (e.g. picking up older children from school, doing grocery shopping, running other chores).

Reinforcing the survey findings, **family day care**, with higher staff to child ratios and an environment more closely approximating a home environment, appears to be most popular among parents of younger children, including those who have tried and not liked, or do not yet feel ready to use larger, centre-based education and care. Parents spoke of the benefit of reduced likelihood of illness due to their child mixing with a smaller number of other children. Some considered family day care to be more affordable for them than long day care given they only pay for the hours they use, after a minimum number of hours, and require less than a full long day care day (usually roughly 10 hours).

Unpaid care appeared generally to be used as a supplemental form of care by those in the survey, as a means to reduce overall care costs, to fill gaps where insufficient hours or days of care can be procured in paid services, or to reduce hours in centre-based care for very young children, where parents have perhaps returned to work earlier than they would have liked. While children being cared for by loving relatives to whom they are attached was thought of as ideal by some, concern was also expressed that a need for stimulation and socialisation may not be adequately met by such an arrangement, especially among older children. Some parents also mentioned challenges in family dynamics when depending on grandparents to provide reliable care for work purposes.

HOW FAMILIES ARE USING EDUCATION AND CARE SERVICES

The survey revealed that the majority of families with children aged 0–5 years had to this point used some form of ECEC for these children.

Overall, 88 per cent of the parents of 0–5-year-olds surveyed indicated these children had used a form of care or education other than being cared for by their own parents/guardians exclusively at home and 78 per cent were currently doing so. Furthermore, the majority of parents surveyed (70 per cent) were using a paid service for care and education and in almost all cases (69 per cent of parents surveyed) this involved ECEC (used either exclusively or in combination with other care and education arrangements).

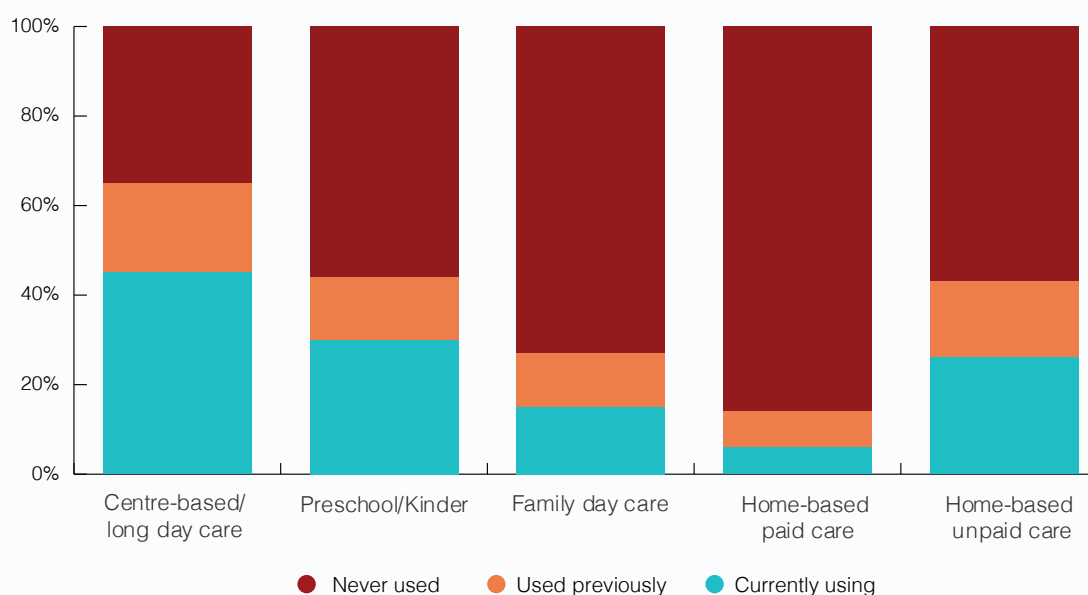
Figure 4 shows the proportion of parents currently using different types of care and education for their 0–5-year-old children. Centre-based/long day care was the most commonly used care and education service, with 45 per cent of parents of 0–5-year-olds not yet in school currently using this type of service and a further 19 per cent having ever used it. This was followed by preschool/kinder, currently used by 30 per cent and used previously by 14 per cent. Home based paid care services such as nannies was the least commonly used type of care and education service, with 86 per cent of surveyed parents of 0–5-year-olds never having use this.

Close to one in three (31 per cent) of those currently using any form of care and education for their children (other than being cared for by parents/guardians exclusively at home), indicated they were using more than one form of care and education, which may have been for the same child and/or for other children they had aged 0–5 years not yet in school (the survey did not differentiate between these).

Among this group of parents, a broad range of combinations of paid and unpaid, ECEC and non-ECEC care and education arrangements were reportedly being used currently.

Use of more than one form of care and education were most common among those currently using home-based paid care (93 per cent), with only seven per cent of those currently using home-based paid care exclusively used this type of education and care.

Figure 4. Use of education and care services



Question: Excluding care provided by their parents/guardians, which if any of the following have you used for their care/education?

WHY PARENTS ARE CHOOSING NOT TO ENGAGE WITH PAID ECEC SERVICES

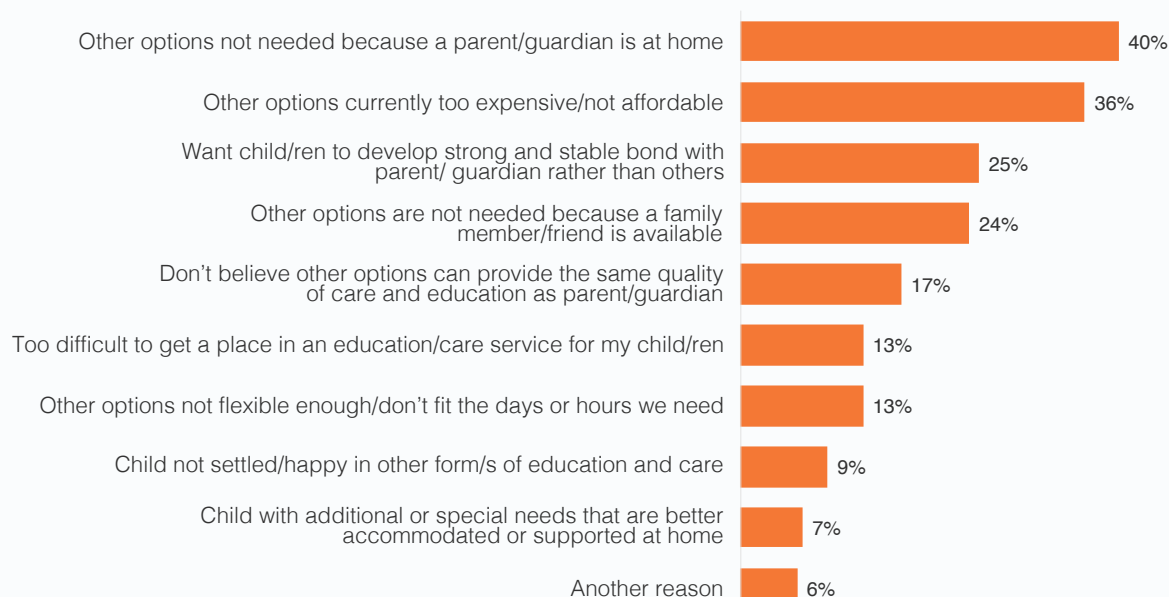
In the survey, parents with any children aged 0-5 years who were not currently in school and not using any paid care were asked to indicate the reasons for this current arrangement, see Figure 5. Key reasons include:

- there is no perceived need for other care and education arrangements given a parent/guardian (40 per cent) and/or a family member/friend (24 per cent) is available
- other care and education options were not being used because they were too expensive or not affordable (36 per cent)
- attitudinal barriers such as a desire for their child/ren to develop a strong and stable bond with their parent/guardian rather than others (25 per cent) and a belief that other care options could not provide the same quality of care and education as the parent/guardian (17 per cent).

Fewer parents indicated accessibility or flexibility barriers, such as difficulty getting a place (13 per cent) and/or days or hours not suiting needs (13 per cent), as reasons they were not currently using paid care and less than one in ten (9 per cent) had opted out of other care and education arrangements because their child was not happy or settled using that type.

Findings from the qualitative research suggest that issues around the flexibility, accessibility and quality of early childhood education and care tend not to be absolute barriers to its use, in and of themselves. However, parents spoke of these issues: 'tipping the balance' in favour of a parent delaying their return to work or the family accessing unpaid care where this is available; and resulting in inadequate or less than ideal education and care arrangements.

Figure 5. Reasons for not using paid care currently



Question: When it comes to the care and education of your child/ren aged 0-5 years not yet at school, which of these reflect the reason for your current arrangements.

WHAT ARE FAMILIES' EXPERIENCES OF ECEC?

ECEC DECISION JOURNEY

1. Determine whether to seek care and education

First parents must decide whether or not to seek care and education for their child at all, which typically occurs at one of two key turning points: the first is around the end of parental leave (around 1 year of age) and then at around age 3 years, when the perceived need for school readiness increases.

This decision is impacted by numerous factors, most notably whether or not the primary carer needs to be working. Also considered are the age of the child and whether parents or other family members (grandparents) can provide the kind of stimulation from which children will benefit. At this stage, parents are figuring out – Do I/we both need to return to work? Do we have unpaid care options? Weighing it all up, is it worth returning to work? Can we/ grandparents, offer our child enough at home?

Parents are highly engaged in this decision, which can evoke strong emotions.



...because I work full time there's guilt factor that I feel that they need this extra stuff, because obviously when I was growing up my mum was a full time mother.

MOTHER OF THREE-YEAR-OLD TWINS, SINGLE PARENT, 45–49 YEARS,
LOWER-MIDDLE INCOME, LANGUAGE OTHER THAN ENGLISH, METROPOLITAN AREA

2. Identify type of care and education

Once the need for care is established, parents explore which type of care and education is going to best suit their and their child's needs. This is strongly impacted by existing perceptions of the different types of care and education, as well as workplace requirements and actual service availability.

The child's need for mental stimulation, socialisation, physical activity and school preparedness are considered, as are the cost and likely Child Care Subsidy, and service flexibility and hours. Also relevant are perceived exposure to illness and the perceived overall quality of care/education.

3. Shortlist options

In identifying which specific services/providers to pursue, parents use a variety of information sources, however their own view of the service/provider is crucial in this process. This process is heavily informed by direct contact with the service, typically in the form of a visit.

“

...it is important to meet people and go and see their home and for me, I even liked to observe the way that they were acting with the children they already had in care, if that was when they chose to have, they call it an interview but, so for me that was important but at the same time a lot of the time you don't figure out the way that a person is with your children until you are already in the thick of it.

MOTHER OF THREE-YEAR-OLD, 25–29 YEARS, LOWER-MIDDLE INCOME, REGIONAL AREA

4. Waitlist/book/arrange

Once they have decided on their preferred option/s, parents then waitlist their child or finalise arrangements for care. Parents will often go beyond services they prefer if their requirements and a lack of availability necessitate it, and will increase their chances of a place by listing their child for several services in the hope that a place will arise sooner.

5. Revisit options

When child or family needs or circumstances change, parents navigate the decision-making process again, usually armed with more confidence and greater understanding of the system and how to get their needs met, than when they first considered care and education options.

The child's need for mental stimulation, socialisation, physical activity and school preparedness are considered.

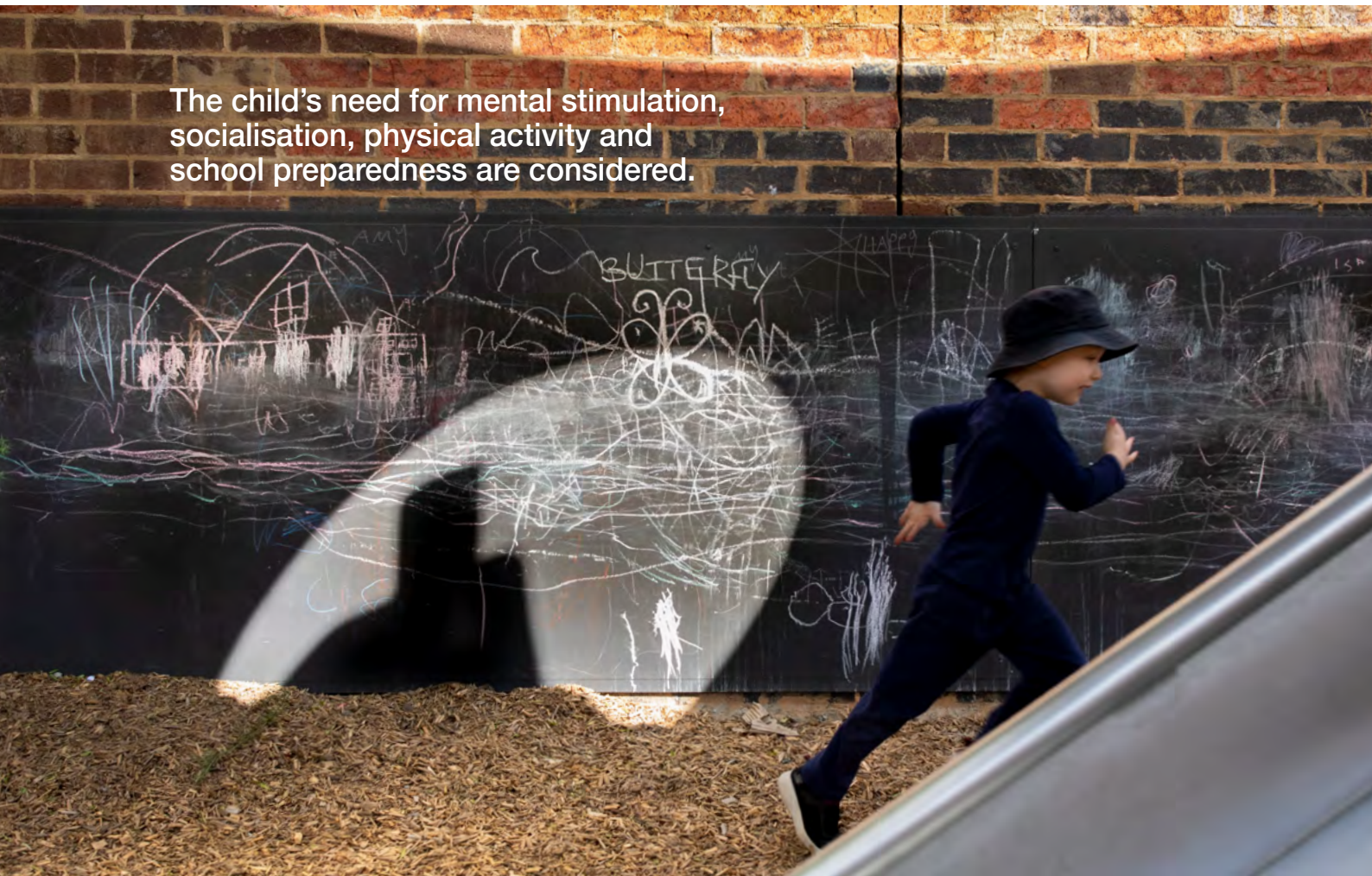
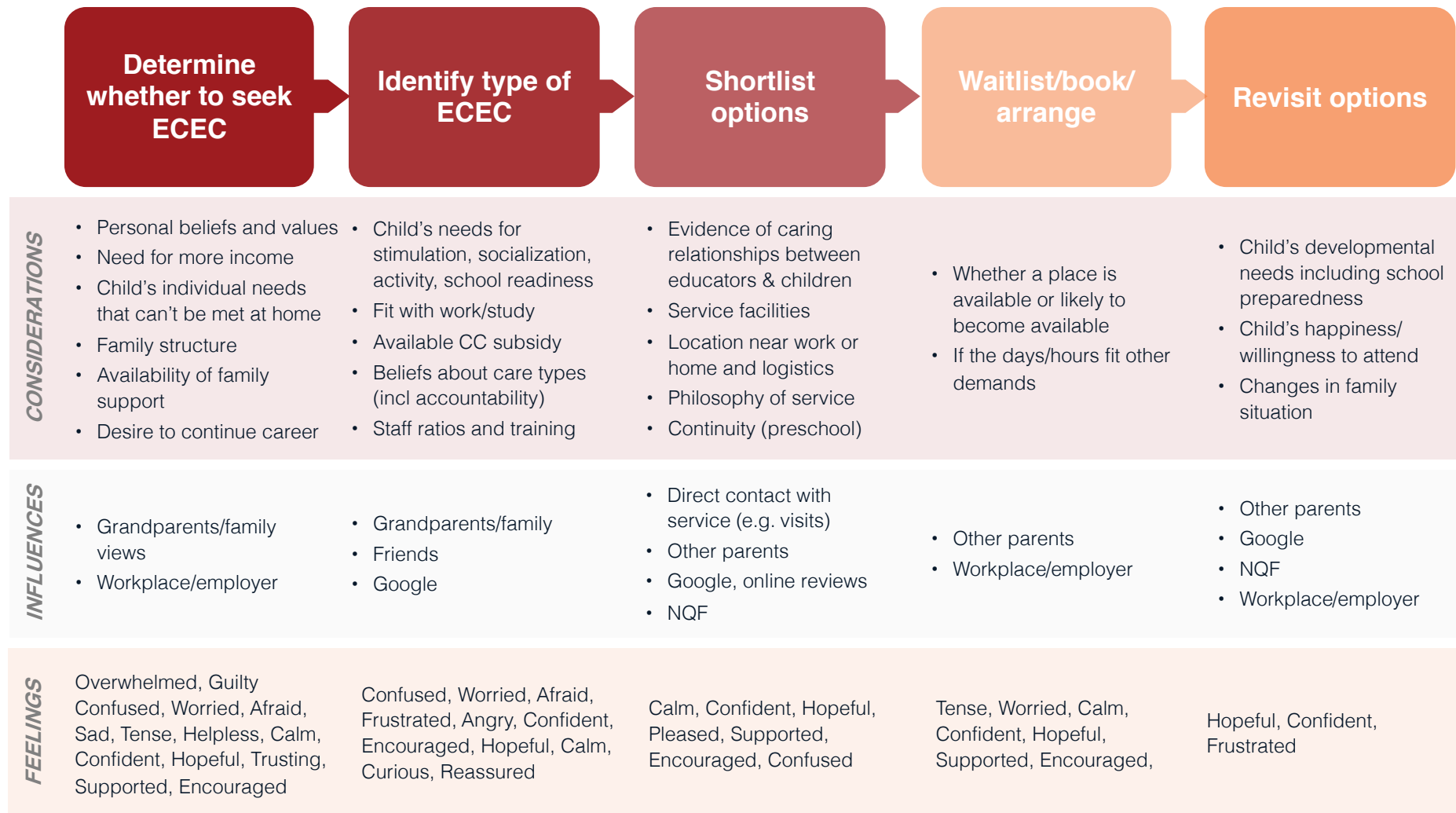


Figure 6. ECEC Parent Decision Journey



LIMITS TO FREEDOM OF CHOICE IN ECEC

In the qualitative research, parents repeatedly mentioned facing limits to their free choice when trying to secure care and education for their child. These limits were determined by a number of factors including:

- long wait lists for oversubscribed services
- lack of availability of a place when it is needed
- living in a regional area where there were fewer education and care services
- mismatch between the days, hours, or days of the week or the overall flexibility required
- out of pocket costs of some types of care did not fit family budgets
- unusual circumstances unable to be accommodated (e.g. siblings, children with additional needs).

As a result, some parents had secured an arrangement they did not believe was best for their child, simply because it was the only option available when needed. This situation served to exacerbate parents' angst at a time when they typically felt overwhelmed, anxious, confused and uncertain about their decisions. Especially since this care and education place may also not have matched their needs in terms of days or times.

In the context of these limitations, some parents spoke of having less choice about the education and care of their child 0–5 years than one might expect, given the comparatively large number of education and care types theoretically available for parents to choose between. How much choice parents felt they had as they moved through the decision-making journey impacted how stressful it was, how much autonomy they felt they had and the extent to which it resulted in the care and education they preferred.

After discounting options that they could not afford, could not access due to unavailability of places, did not align with their own philosophies (for example, some in the sample were opposed to long day care), or that would not support them to work (for example, has opening hours that don't align with their working hours), some felt they had very little choice indeed.

Consequently, parents often went to great lengths to arrange care and education that struck a balance between work demands, child needs, family situation and financial constraints, resulting in logistical challenges, changes to arrangements over time and a less than ideal combination of services.



CASE VIGNETTE – LIMITS TO CHOICE OF ECEC PROVIDER

Sujani and her family live in a large city. She has a two-year-old in the ECEC system and an older child with additional needs. Sujani did not intend to return to work fulltime after her second child given her eldest child's needs and her workplace's willingness for her to work part-time.

Sujani was comfortable with her child attending away from home centre-based care, as she believes in the social learning opportunities that are less available with small group or one-on-one settings. In deciding on the type of care for either of her children, pre-school was out of the question because of the shorter hours offered. This was something Sujani just accepted working in the private sector – that her hours were a better fit with centre-based care. Despite this, she still describes the struggle she faces, trying to get to pick up on time, alongside others, who are also typically running late.

'...then you missed the train and then you miss the connection, it's like, oh god, and then you get to the station and you pretty much run from the station to the day care centre to make it on time, and it wasn't just me, there were others. It was always the same parents that used to just get off the train and pretty much run...'

The process of finding care though was not easy, and to find the right match with days of the week Sujani needed to work, the family had to accept places for their youngest child at two different day care centres.

'I ended up doing four tours and I put my name down at all of them. There was one that I didn't really like but I thought I better put my name down in case, because everyone at work was saying it's so hard to get day care and they were all quite frustrated with getting spots...I didn't realise how competitive it was. When I put my name down at 21 weeks [gestation], they said, oh you're 75th in the queue...And then a few of the other mums at work were saying pick one, just keep nagging them, keep ringing up being present in their head, so that they can offer you a spot the next year...I did that from time to time, I said look, I don't want to be the nagging like mum or anything, I just want to see how I'm going in the queue, whatever, when I did a tour of that place I was like, it wasn't the newest place, but it was, like you could see that kids have a really good rapport with the educators, lots of hugs, and there was singing and they were doing very constructive play, yes, for the amount of space they had it was all very well laid out, it wasn't the biggest centre either, but it was really nice.'

After some time using both centres, Sujani is very happy with one centre but not the other, and would prefer her child was at the same centre each of his three days.

'...it didn't matter which room like the educator was from, you got to know each one of them... it was a real family kind of atmosphere there. Whereas the other one, every time we picked up there was a different person, they never kind of told you what their name was. It was really random, it was such a high turnover, it was almost like okay I'm just putting my kid in here just to get watched for the day, but there was no constructive, there was no take-home reports, they didn't email them out to you. I basically got nothing from that place for a whole year...'

As a parent of an older child with a disability, Sujani wishes that providers would be clear and upfront about their willingness and experience in accommodating children with additional needs.

**MOTHER OF TWO-YEAR-OLD, OLDER CHILD WITH ADDITIONAL NEEDS,
LANGUAGE OTHER THAN ENGLISH, 45–49 YEARS, HIGH INCOME, METROPOLITAN AREA**



CASE VIGNETTE – DECIDING ON AN ECEC SERVICE AT DIFFERENT AGES/STAGES

Callie unexpectedly became a parent in her mid-20s and now is single mother to a two-year-old. Around six months after her baby's birth, Callie began looking for care as her workplace had indicated they were expecting her to return, which prompted her to feel conflicted about returning to work.

'...initially I didn't really want to put her in day care, I wanted her with me, so I just was kind of like I need to work, I need the money, I've just got to do this, I want her home with me as number one, but I have to work...'

Not having gone through this process before and knowing few peers with young children, Callie relied on her observations of the carers at the centres she was considering, to have sufficient trust to leave her baby in their care.

'...the carers is the number one thing that I was interested in, I think you can always tell if someone, whether it's a carer or just a person, has a genuine interest in your child and I feel like that's quite important.'

After her baby started, Callie felt increasingly uncomfortable about the quality of care and attention her baby was receiving at her centre-based care provider. When COVID hit and Callie was stood down by her employer, she took this as an opportunity to withdraw her baby from care. After some time with Callie's mother helping to look after her granddaughter, Callie's mother suggested she consider family day care. Callie felt more empowered to make this choice having made a choice about education and care before, and now that her baby was approaching toddlerhood.

'I really wanted just to find an educator that I liked and I felt that she was comfortable with or that I was comfortable with, and that I could develop a relationship with and that had a genuine interest, which I didn't feel at all the other [previous ECEC] places...once she started going there I never had the anticipation or the anxiety or the, I never had that icky feeling that I did with the first place, which I first thought was just what it was like.'

Callie is happy with her toddler's current education and care, but would consider centre based care again to meet her child's changing needs. She reflects that the qualities she was looking for in care and education when her daughter was a baby have changed, and anticipates them changing again for her soon-to-be-pre-schooler.

'...when I first was looking I didn't really know what questions to ask, I didn't really know what I wanted either, because it's the first time ever being in that situation, so I was kind of just in the dark really...I just had no idea of anything, so I think that now having experienced [it] maybe I understand more of what I want and what I think is good and whereas before I just was like oh, this is close to my work, let's go here, I think I would definitely search around until I found one like yes, this feels like the right one. I'd do a lot more probing I guess into the centres...

I think I'd really be looking at the educators, and probably more as she gets older as well the facilities I guess because babies don't do much, whereas they get to three or four the education and the facilities are definitely better, or more use...so yeah, I think I'd be looking at that, probably still the educators to make sure that they are capable and engaged, yeah, the facilities and how they structure their day, or a school readiness program and that sort of stuff.'

**MOTHER OF TWO-YEAR-OLD, SINGLE PARENT, 25–29 YEARS,
LOW INCOME, METROPOLITAN AREA**

BARRIERS TO USE OF ECEC

As mentioned earlier, findings from the qualitative research suggest that putting a child into paid education and care for the first time, can be a daunting experience for some parents. Where there is an obvious and practical alternative to doing so – a parent staying home with the child, or the child being cared for by a family member such as a grandparent – this represents a sensible alternative to paid education and care for some families, who defer a decision about whether to send their child to an ECEC service (and what type) to a later time.

The idea of leaving one's child, let alone baby, with someone else for the first time can be a powerful deterrent to seeking care and education. For those who can afford to, this can lead to avoidance of the system until triggered at a later point in time by: the end of breastfeeding; when the stay-at-home parent's employer requires a return to work; when the unpaid carer's responsibilities become too much for them (for example, for an elderly grandparent); or when family finances dwindle. This can also be prompted when it becomes apparent that the child requires more stimulation than what is offered in the home environment.



Cost is a huge barrier. Being convinced it's the right choice is also a huge barrier. I'm just not persuaded spending a lot of time away from their family (usually with a stranger) is the right choice for a young child. We could be persuaded that over time... but not straight after parental/maternity leave. So, the main barrier could be said to be the child themselves. Stability is crucial for kids and asking a young child what they want early in life will usually be met with their desire to be with their parent.

PARENT — NON-USER OF ECEC

Many parents could point to both pros and cons of each of the different education and care types, and some expressed the view that there are really no types of education and care (whether formal or informal) currently available that fully meet both family and child needs, with all having key limitations. For example, hiring a nanny or au pair can provide excellent one-on-one, individualised care, advantageous particularly for babies, siblings, and busy working families needing flexible, out of hours help; however, this form of care is expensive (not attracting the CCS), and can leave families exposed where the nanny/au pair is sick, leaves or otherwise unable to work. A lack of confidence in any of the options available seemed to lead some parents to conclude that their child was simply “not ready” yet for the early childhood care and education system.

THE EXTENT TO WHICH ECEC ARRANGEMENTS MEET FAMILIES' NEEDS

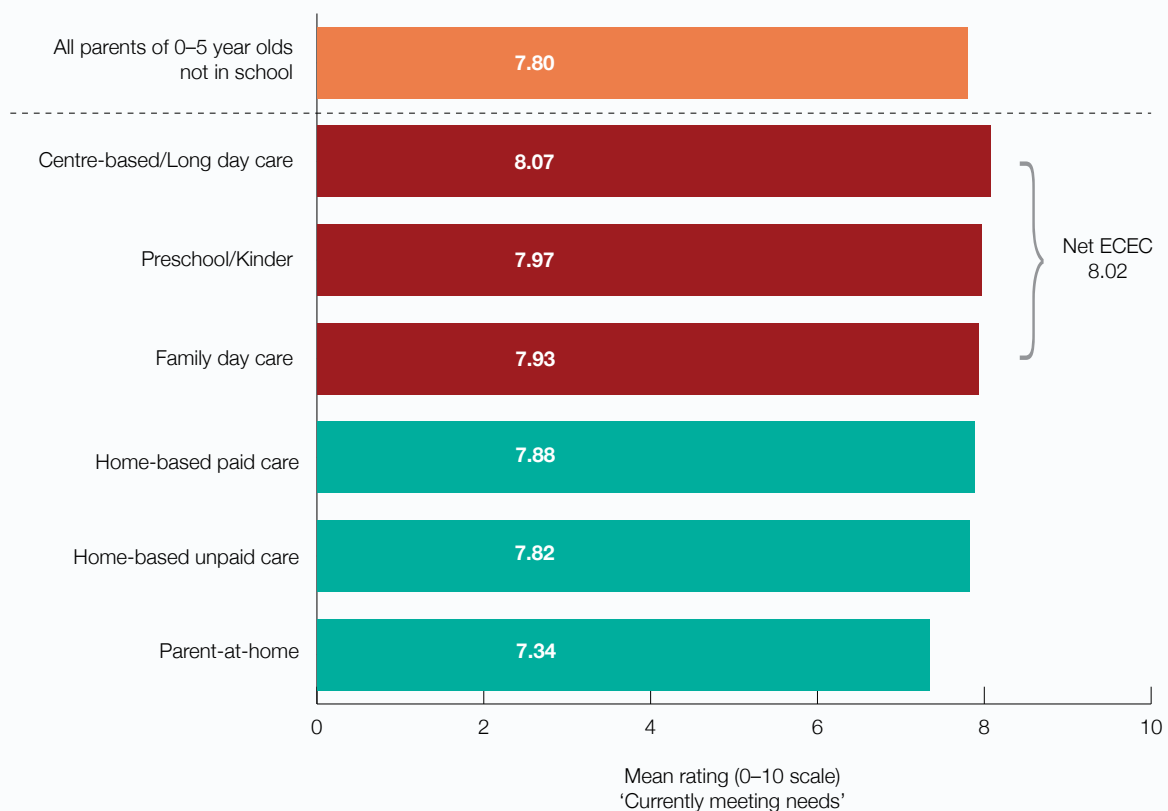
Parents were asked to rate how their education and care arrangements were meeting their needs.

Overall, parents indicated their needs were moderately, but not completely, being met by the current education and care arrangements they have in place for their 0–5-year-old children, giving a mean rating of 7.80 out of 10.

Across the different education and care types shown in Figure 7, there was little differentiation in the extent to which users felt their needs were being met, with mean ratings ranging from 7.34 to 8.07 out of 10. The exception to this was the exclusive care and education of children provided by their parents at home, which was significantly less likely to be meeting needs than all other forms of education and care (mean rating of 7.34).

The mean rating was highest for centre-based/long day care (at 8.07) and this was significantly higher than ratings given to home-based paid care (7.82) and children being cared for exclusively at home (7.34, as noted above).

Figure 7. Extent to which education and care is meeting needs



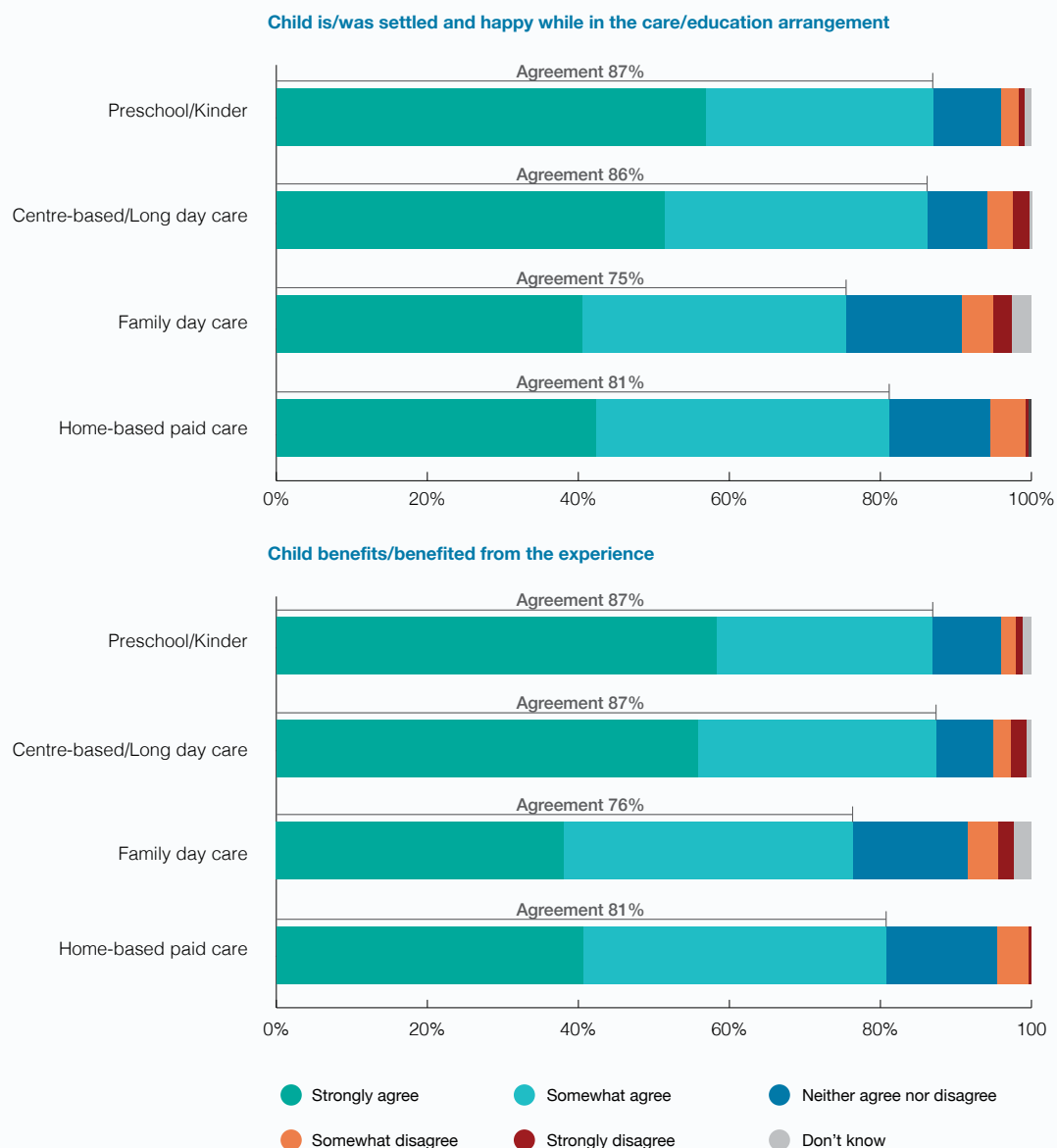
Question: Thinking about these needs, overall, to what extent are they being met by your current arrangements for the care and education of your children aged 0–5 years who are not yet at primary school?

PERCEPTIONS OF CHILD'S EXPERIENCES

Parents completing the survey who had used paid education and care services for their child/ren aged 0–5 years not yet at school, were asked whether or not they agreed with two statements regarding their child/ren's experiences with these services. Responses to these questions are shown in Figure 8 for specific types of care and education services.

The vast majority of parents whose children have used these types of services agreed that their child is or was settled and happy while using the service, and that their child/ren have benefitted from the experience. Agreement with these statements, however, was slightly higher in relation to users of pre-school/kinder and centre-based/long day care than among those using family day care and home-based paid care services – these differences are particularly stark when looking at the proportions strongly agreeing with each of the statements.

Figure 8. Child's experiences with education and care services



Question: Thinking about the experiences of your child at/in [CARE TYPE], from what you've noticed, please indicate how much you agree or disagree that your child is was...?

A small number of parents in the qualitative research mentioned that their child did not appear to be enjoying attending their ECEC service or was not settling in, which had prompted them to take their child out of education and care, or not pursue an offered place after trialling the service. It appeared that there was greater sensitivity to and attention on observation of the child's experience in determining whether to 'stick it out' for children at younger ages, and concerns about children's reactions seemed most common for long day care. Perhaps this was, as mentioned before, due to children's increasing ability to express their own preferences more clearly as they get older.

“

I'd like my child to attend Kindergarten later on, when he's 4 years old. Hopefully, he will be ready by then and will start enjoying it. Barriers for trying earlier would have been the lack of proper transitioning and my child simply not being ready yet.

PARENT — NON-USER OF ECEC (PREVIOUS USER)

Most parents in the discussion, especially those who only had experience with one service, spoke in broadly positive terms about their experiences with paid ECEC and most seemed to think that their child was generally happy in the care and education service they were in. This perception may be influenced by choice-supportive bias, whereby parents reflect positively about a decision they have made.

“

Our child is discovering some new passions we didn't know she had, and the centre has worked so hard to find out what each kid likes. They even put the rock song from trolls world tour movie on when she asked for it. Our expectations have probably been somewhat exceeded. We don't expect them to know our child all that well, but to love and care for them as they are able. They've gone beyond that.

PARTICIPANT — USER OF ECEC

Many parents, during the discussion, spoke of unexpected benefits, or a greater magnitude of benefit than expected, for their child being in formal ECEC, for example, their child making more genuine friends than expected, having engaged with fun and worthwhile activities more so than they would have done at home, moving towards independence skills more quickly, and coming home having learned a surprising number of things.

“

I think it has been great. My daughter has friends that she recognises and seeks out when she arrives. She wouldn't have been able to make or develop these connections without the centre. She has also grown so much such as learning different dances and learning how to use utensils which was something that we were having a hard time teaching her to do at home.

BOARD PARTICIPANT — USER OF ECEC

EXTENT TO WHICH CARE TYPES MEET SPECIFIC NEEDS

Through the survey, parents who had currently or previously used paid education and care for their 0–5-year-old children were asked to indicate whether or not each of the types they had used had met their needs on seven relevant domains (previously described in the section ‘Perceived value of education and care services’).

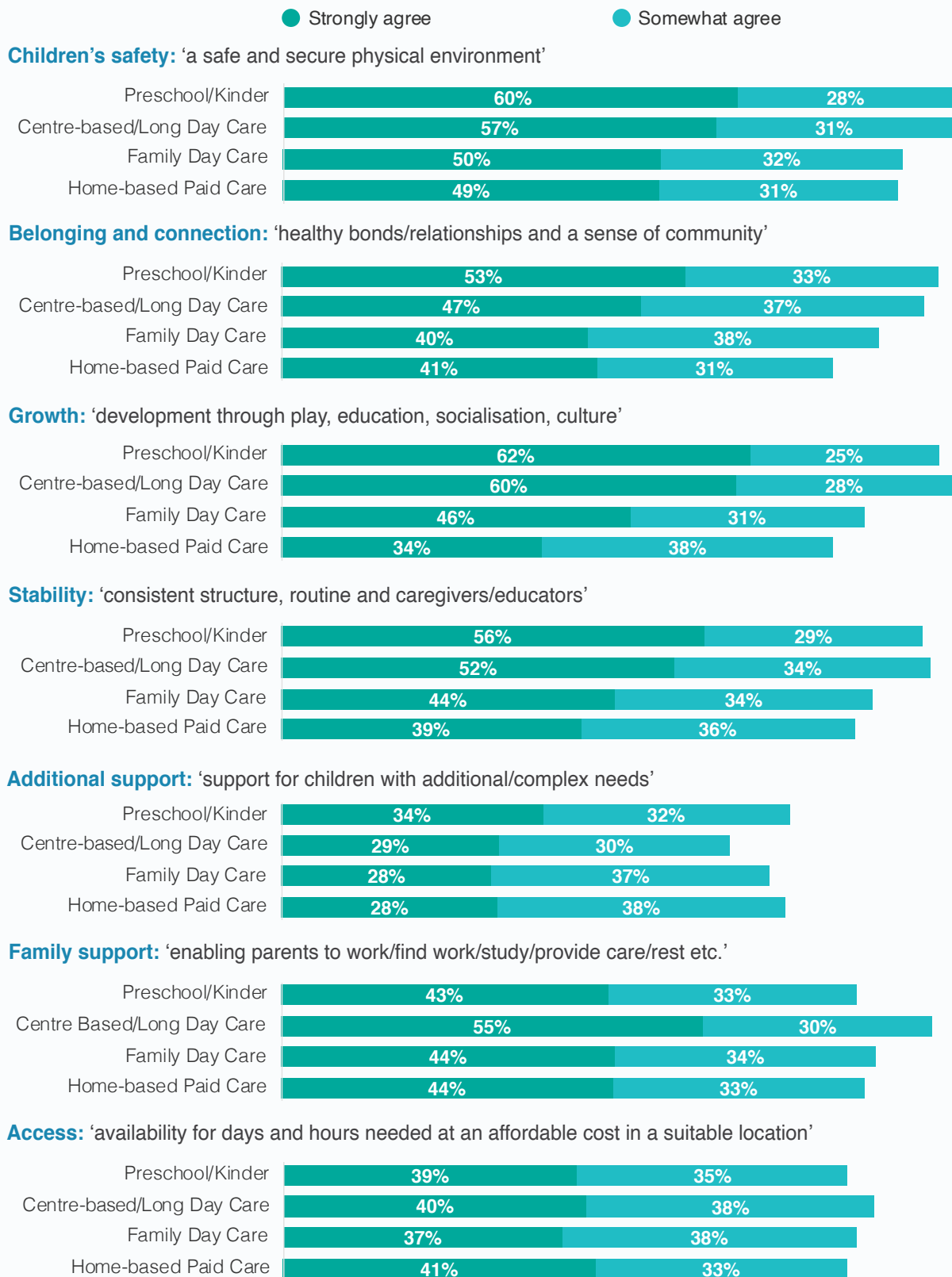
Overall, preschool/kinder and centre-based daycare appeared to have more consistently met needs across most of the domains than family day care and home-based paid care. Summarising the pattern of results from Figure 9 for each of the types of paid education and care revealed the following:

- **Preschool/kinder** – Agreement was strongest that this type of paid education and care had met safety, growth and belonging and connection needs (88 per cent, 86 per cent and 86 per cent agreement in total, respectively) and less so that it met additional support (67 per cent) and access (74 per cent) needs. Along with centre-based care, it was more often meeting safety, growth, belonging and connection and stability (84 per cent) needs than family day care and home-based care.
- **Centre-based/long day care** – As for preschool/kinder, agreement was strongest that this type of paid education and care had met growth and safety needs (88 per cent agreement for each) and less consistently that it met additional support needs (59 per cent). However, it appeared to be better meeting family support needs (86 per cent) than the other types of paid education and care.
- **Family day care** – Particular strengths relative to other domains appeared to be in relation to having met safety needs (81 per cent). However, this type of education and care had not met any of the specific needs more commonly than the other types of paid arrangements.
- **Home-based paid care** – Particular strengths relative to other domains appeared to be in relation to meeting safety (81 per cent) and family support (77 per cent) needs. However, this type of education and care least commonly met the specific needs when compared with the other types of paid arrangements.



Overall, preschool/kinder and centre-based daycare appeared to have more consistently met needs across most of the domains.

Figure 9. Extent to which different types of education and care are meeting specific needs



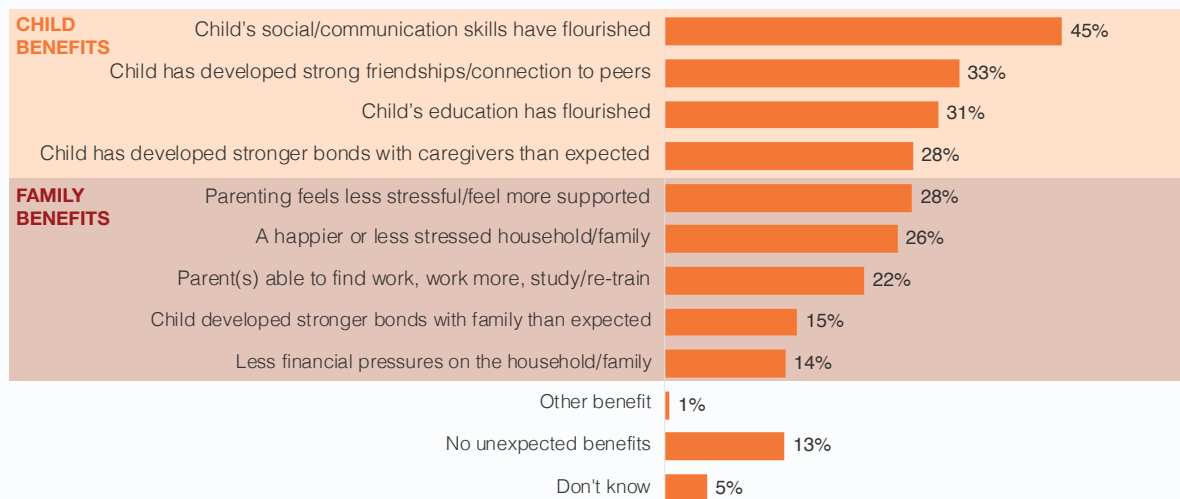
Question: You mentioned that you currently or previously used education and care services or arrangements for your child/ren who are aged 0-5 years and not yet in primary school. Thinking about your experiences with [PIPE IN PAID CARE TYPE] for your 0-5 year old child/ren, please indicate how much you agree or disagree that it provides/provided..?

UNEXPECTED BENEFITS OF ECEC

More than four in five parents using paid education and care for their children aged 0–5 years indicated that there were unexpected benefits resulting from these arrangements (82 per cent).

As shown in Figure 10, the most commonly selected unexpected benefits related to child development and growth, with unexpected benefits to the family secondary to these overall.

Figure 10. Unexpected benefits (prompted) of paid education and care



Question: Thinking of your current arrangements with [ALL CURRENTLY USED PAID CARE], which if any of these benefits have your child, you or your family experienced that you did not expect?

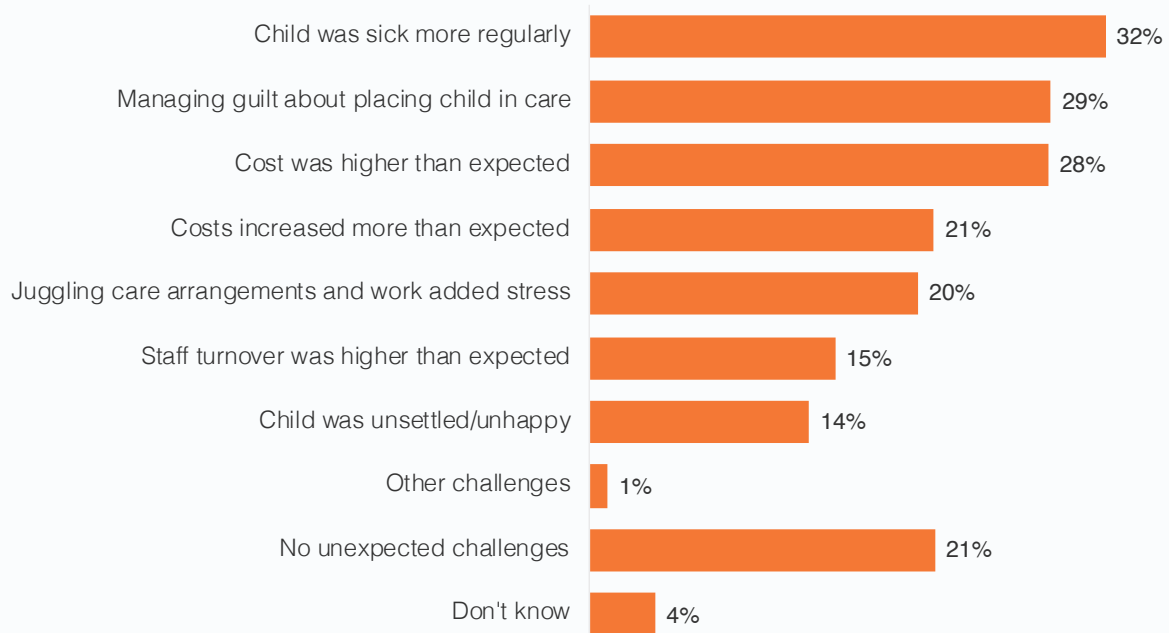
The most commonly selected unexpected benefits related to child development and growth.



UNEXPECTED CHALLENGES OF ECEC

Three quarters of parents of children aged 0–5 years not yet in school (75 per cent) could point to at least one unanticipated challenge of using paid education and care for their children. As shown in Figure 11, the most commonly selected unanticipated challenge, from the list presented to parents, was that their child was sick more regularly (mentioned by 32 per cent). Almost as many mentioned the unanticipated challenges of managing guilt about placing children in care (29 per cent) and higher than expected costs (28 per cent).

Figure 11. Unexpected challenges (prompted) of having a child 0–5 years not yet at school in paid care



Question: Thinking of your current arrangements with [ALL CURRENTLY USED PAID CARE], which if any of these challenges have your child, you or your family experienced that you did not expect?

In the qualitative research, many parents acknowledged that they had made decisions about the care and education of their children based on only partial information, relying on ‘gut feel’, bits of information fed to them from other people, and as much research as they were able or inclined to do.

Some mentioned that, in hindsight, when considering what their care and education arrangements should be, they wished their priorities had been elsewhere, as they realised that they hadn’t focused on what was really important. Others regretted not having considered options of which they had not initially been aware.



I wish I’d looked a little more into food offered and learning programs as I think both could be more structured. And as it was our first time, we didn’t think to check.

PARENT — USER OF ECEC

The discussions revealed that parents whose experiences with ECEC services are very poor, will look to withdraw from paid care and make other arrangements, or attempt to shift services or change ECEC types. The research sample included those who had begun using family day care and shifted to centre-based care, which they felt better met their needs, and vice versa, revealing variation in family needs and preferences. It also included those who had had a very poor experience with one service provider, but an excellent experience with another (in both of the aforementioned service types, as well as informal paid care), revealing variation between particular service providers in quality and offerings. It also included those considering or actively intending to shift into ECEC.

“

After such a horrible experience in a centre, I decided to go the other way and look into family day care. I spoke with my daughter's father's cousin who once ran a family day care about the service, the values, etc. I found one close to home, felt a great vibe from her, and decided to send my daughter there 2 days a week. This was the best decision I ever made, as it really suited me and my family and my daughter has absolutely thrived in this environment.

PARENT — USER OF ECEC

“

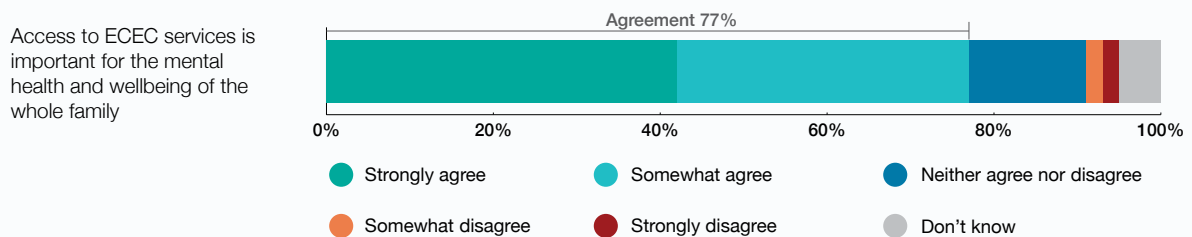
Having a Nanny as the primary care arrangement is fantastic. The only downside with our 2 year old daughter is that she has become extremely shy. This is likely due to lockdown last year but she is only comfortable with immediate family and our Nanny. We have begun dancing and gymnastics lessons for her to socialise and get exposed to other kids. The unexpected part of all this is that although we are paying more to have a Nanny than childcare, we have to pay additional for all these extra activities which would be included in the fee at a child care centre.”

PARENT — NON-USER OF ECEC

FAMILY WELLBEING

In the survey, more than three quarters (77 per cent) of parents currently using paid care and education agree that ‘access to ECEC services is important for the mental health and wellbeing of the whole family’.

Figure 12. Perceptions, amongst current users, of the importance of education and care for the mental health and wellbeing of the whole family



Question: Thinking about your experiences relating to the care and education of your 0-5 year old child/ren, please indicate how much you agree or disagree that..?

HOW IS THE CURRENT SYSTEM PERFORMING ACCORDING TO PARENTS?

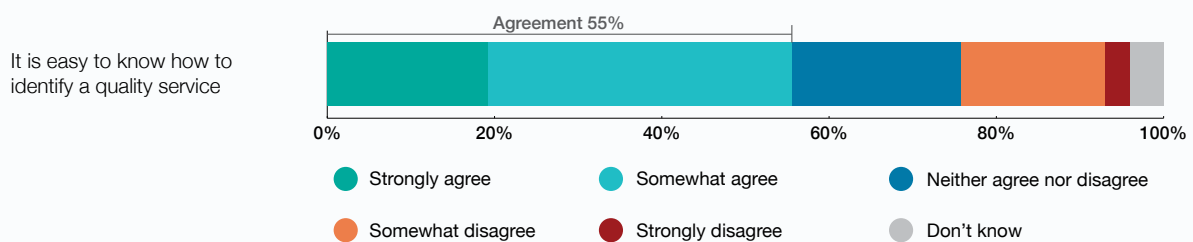
This section summarises parents' perceptions of how the current system is performing in terms of quality, access, flexibility and affordability, enabling workforce participation and supporting family wellbeing.

QUALITY

Almost three-quarters (73 per cent) of all parents of children 0–5 years not yet at school, agreed with the idea that 'the ECEC system needs to change so more children can access quality education and care (see Figure 17).

Only 55 per cent of parents currently using paid care and education agreed that 'it is easy to know how to identify a quality service'.

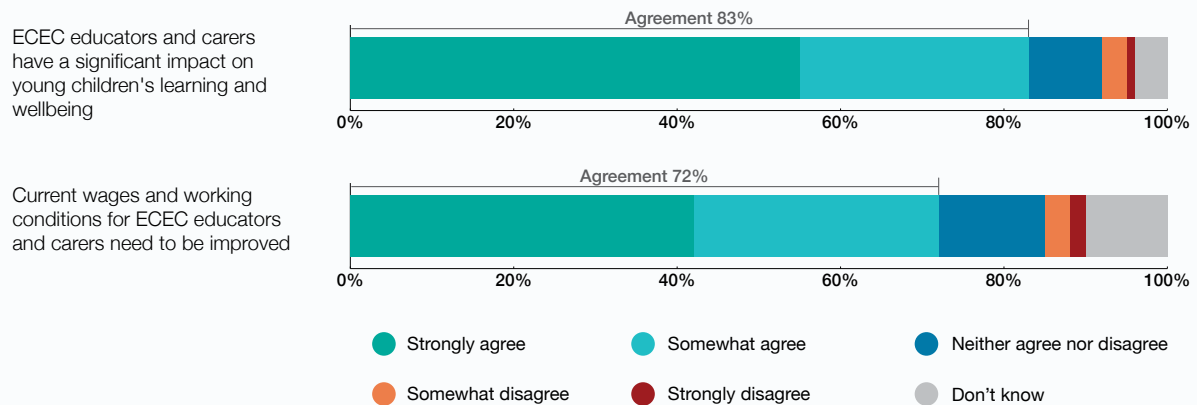
Figure 13. Level of agreement/disagreement with statements relating to ECEC quality



Questions: Thinking about your experiences relating to the care and education of your 0–5 year old child/ren, please indicate how much you agree or disagree that...

The qualitative research suggested that ECEC staff are seen to be strongly implicated in the quality of care and education received, and so issues relating to this workforce can perhaps usefully be considered under the banner of quality. Indeed, as illustrated in Figure 14, 55 per cent of parents of children 0–5 years not yet at school surveyed, strongly agreed with the statement 'ECEC educators and carers have a significant impact on young children's learning and wellbeing', with a further 28 per cent somewhat agreeing.

Widespread support was revealed for the importance of educators and carers to be reflected in their working conditions and pay, with 42 per cent strongly agreeing and a further 30 per cent somewhat agreeing that 'current wages and working conditions for ECEC educators and carers need to be improved.' Of note, the proportion agreeing (either strongly or somewhat) that current wages and working conditions need to be improved, increased from 72 per cent overall, to 80 per cent specifically, among those believing educators and carers to have a significant impact on outcomes (that is, agreeing with the other statement in Figure 14).

Figure 14. Support for educators, including pay and conditions

Question: And to what extent do you agree or disagree with each of these statements about ECEC?



QUALITATIVE FINDINGS

In the qualitative research, parents were asked to describe what 'quality' meant to them in the context of ECEC. They were also asked about their perceptions of how easy or difficult it is for parents to identify quality services, and their overall perceptions of whether or not services in Australia are generally high quality.

Many parents in this research struggled to define 'quality', and where definitions were offered, they varied considerably between individuals. Hallmarks of quality variously mentioned included:

- positive carer/educator/child interactions with continuity of care
- well-supported staff – increasing quality through lower turnover and happier employees
- services adhering to standards and being accountable
- a safe, healthy, hygienic environment
- child growth, educational achievement, school readiness – particularly for older children
- adequate resources, good customer service, lots of inclusions – focused heavily on by some, not seen to be important to others (some felt this might attract a cost premium).

Few felt that it was easy or even possible at all to assess a service's quality prior to enrollment. Most did not mention the NQF (others did not believe it contains the right measures or provides adequate service differentiation) and there were mixed views about trusting Google or other online parent reviews. Even the all-important service visit was perceived to be only a glimpse of relevant aspects of a service. Some parents said they felt quality was difficult to assess even once a child is enrolled because there was no way to objectively assess or compare across services. Parents, therefore, had to rely on 'gut feel', word of mouth from friends and any feedback provided from the child or the service.

Many parents hoped and assumed that ECEC services in Australia were generally of high quality, with some relatively minor variation between service types and individual providers. Key areas of doubt about service quality included:

- Possible insufficient scrutiny/oversight of providers, particularly in the family day care space (where accreditation is known about, parents are unsure if there are genuine 'spot checks' of compliance).
- The running of ECEC for profit, the assumption being that quality will suffer in the pursuit of maximising profits. Some saw issues inherent in the running of services for profit and would be more comfortable with the system being run by government and/or the not-for-profit sector.
- Poor pay and working conditions for carers/educators meaning the industry is unable to attract and retain quality staff. Some parents perceived there to be high turnover at some centres and/or the industry to be a stopgap before progression to a 'better' career.

“

It is difficult to assess and identify quality without experiencing it first-hand. Right now, I trust, hope, and believe that my child is receiving quality from his ECEC, but I have no idea whether he will enter primary school with the required skills until we actually get there...

PARENT — ECEC USER

“

Quality to me means how the educators attend to a child's needs. Are they loving and caring? Are they taking the time to get to know the child? Sometimes you might not even know for sure and it's more about your gut feeling.

BOARD PARTICIPANT — NON-USER OF ECEC

AFFORDABILITY OF ECEC

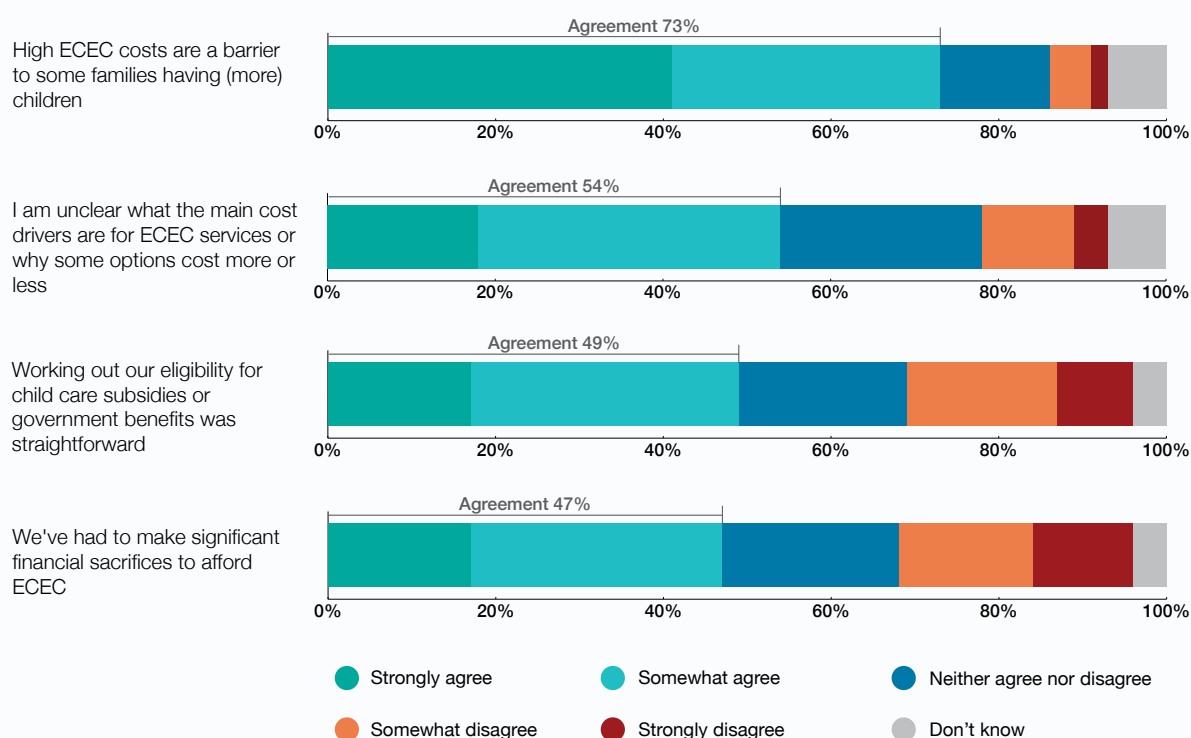
Research findings relating to perceived affordability of ECEC services are reported here, although a stand-alone section specifically addressing this as it relates to workforce participation follows.

As illustrated in Figure 15, among those parents currently using paid care and education for their child 0–5 years, not yet at school, and so for whom cost is not an absolute barrier to use, 17 per cent strongly agreed and a further 30 per cent somewhat agreed that they had nevertheless 'had to make significant financial sacrifices to afford ECEC'.

Highlighting other pain-points relating to fees and affordability among those using paid care, just over half (54 per cent) agreed (18 per cent strongly) that they were unclear 'what the main cost drivers are for ECEC services or why some options cost more or less', and almost one in four (27 per cent) *disagreed* that working out their eligibility for the CCS was straightforward (9 per cent strongly disagreeing).

Among all parents of children 0–5 years not yet at school, 41 per cent strongly agreed and a further 32 per cent somewhat agreed that 'high ECEC costs are a barrier to some families having (more) children'.

Figure 15. ECEC costs and affordability



Question: Thinking about your experiences relating to the care and education of your 0-5 year old child/ren, please indicate how much you agree or disagree that...?; And to what extent do you agree or disagree with each of these statements about ECEC?



QUALITATIVE FINDINGS

For many participants in the qualitative research, affordability of care and education services was raised as an issue that impacts decision making.

The first two stages of parents' decision-making journey involved making calculations and assessing what type and amount of care and work were worthwhile. In the first instance, affordability had for some impacted the timing and nature of parents' return to work. The impact of affordability (and access and flexibility) on whether and how much parents participate in the workforce is discussed in more detail in the subsequent section – Workforce Participation.

For most, affordability appeared to impact the downstream choice of care and education type, as well as the specific configuration of arrangements. In particular, the types of paid care that do not currently attract the Childcare Subsidy, such as nannies, were never considered at all by some who assumed their costs meant they were out of the question and were ruled out by others based on their relative costs. Still, others used more affordable centre-based care and supplemented this with more expensive forms of care (nannies) to fit their needs.

Overall, views of the affordability of care and education were mixed. Some were of the opinion that it was expensive bordering on unaffordable, while others saw it as reasonably priced given the subsidy and even good value for money. For some parents, care and education costs represented a significant part of their family budget and required trade-offs in other areas of spending. Some noted that care and education costs had to be managed alongside other major cost of living pressures, such as housing (high rent and/or saving to buy).

“

...we just had to spend less money on what we planned to spend on holiday accommodation... it [pre-school] was \$1600 more than we had expected and so we just had to spend what was going to be accommodation money on preschool.

FATHER OF FOUR-YEAR-OLD, 35–39 YEARS, LOWER-MIDDLE INCOME, REGIONAL AREA

“

You still have to pay a fair chunk out your own pocket, you know. Like I said just being on my own too, it's just too hard and because...I'm not in government housing or nothing and I'm paying rent... and like everyone, they've got their bills on top of it, and their shopping and if you take the kids out or yes, so it gets a bit tricky but as a parent, you just soldier on and do the best you can.

MOTHER OF TWO-YEAR-OLD, ABORIGINAL AND TORRES STRAIT ISLANDER, SINGLE PARENT, 35–39 YEARS, LOW INCOME, METROPOLITAN AREA

Working out the applicable CCS, and its impact on affordability, also met with mixed perceptions. Some found it straightforward, while others had experienced this process as complex, confusing and hard to navigate and estimate:

“

...trying to figure it out on the government website between childcare subsidy and early education and which category of person you fit into, depending on which family tax benefit and health care card, and it's just a lot of variables. So, to be honest we weren't sure... there's stuff from the [state] government and then stuff from the federal government, and the [state] government doesn't particularly care about a health care card but the Federal government does, and just how all that fits together. You can't get a straight answer that this is what it will cost.

FATHER OF FOUR-YEAR-OLD, 35–39 YEARS, LOWER-MIDDLE INCOME, REGIONAL AREA

A bug bear for many parents using ECEC was the challenges associated with paying for services when their child is not using them, whether due to public holidays, sickness (often seen to be caused by attending the service) or family holidays.

Public holidays were a particularly sensitive issue, especially for parents working casually and themselves not being paid for the holiday, or who had to stay home with their child and give up work on public holidays, at the same time as covering fees. This payment for service even when the child is not being cared for made the effective daily rate higher than parents' original estimates:

“

...the days that he was enrolled was a Monday and Friday, and I found that's when a lot of public holidays were, and then you have to pay for them days... so it was getting expensive as well for days that he was missing...

MOTHER OF TWO-YEAR-OLD, ABORIGINAL AND TORRES STRAIT ISLANDER SINGLE PARENT, 35–39 YEARS, LOW INCOME, METROPOLITAN AREA

In terms of parents' perceptions of what comprises the fees for ECEC services, many said they could really only hazard a guess. There was clear agreement, however, that the bulk of fees should be to cover staff costs, to ensure that children have consistent, qualified educators. Most were uncertain whether this was actually the case. Several parents were aware that services closer to the city centre were more expensive than others. This led them to conclude that this is driven by occupancy costs:



... just hearing from other mums especially the ones in the city or in the east they're quite a lot, and obviously everyone's situation is different, the rebate is different, yeah, well I gathered that if you went for the CBD ones it was obviously a lot more expensive than in the suburbs, and of course that would be the case because you look at the rent they would have to pay.

MOTHER OF THREE-YEAR-OLD TWINS, SINGLE PARENT, 45–49 YEARS, LOWER MIDDLE INCOME, LANGUAGE OTHER THAN ENGLISH, METROPOLITAN AREA

During the co-creation session, parents raised a few points related to affordability:

- In terms of the ECEC system and activity test, parents recognise that it takes time to find work and retrain for work and that subsidised care and education is also needed for this.
- Some parents knew of international examples of free, universal early childhood education and care. Some favoured this for the Australian context. A few did not, believing that there should be some out-of-pocket costs for parents given they perceived that parents had chosen to have children and had chosen to put them into care and education.

AN IN-DEPTH LOOK AT ECEC ACCESS AND FLEXIBILITY

Findings from the qualitative research suggest that issues around the flexibility, accessibility and quality of early childhood education and care tend not to be absolute barriers to its use, in and of themselves. However, parents spoke of these issues:

- 'tipping the balance' in favour of a parent delaying their return to work or the family accessing unpaid care where this is available (for example, perceived high costs of ECEC in the context of a low-income family saving to purchase a house, making the prospect of grandparents providing unpaid care, more appealing than it may otherwise be, or poor early impressions of ECEC services leading parents to decide to defer use);



Unfortunately decided to resign and stay home to take the child myself. Some cheaper long day cares located far away from home, and some expensive ones I cannot pay from the salary. So, it was better to stay home for a while, until she turns 3 years old.

PARENT — NON-USER OF ECEC

- resulting in inadequate or less than ideal education and care arrangements, such as care being secured but on an insufficient number of days, a different type of care secured that what was wished for, or a combination of care types needing to be relied upon.

Gaining a place in ECEC that was sufficiently flexible to meet a family's needs was observed to be a significant issue across the board for parents in the qualitative research. Finding that an ECEC service favoured for their child's needs had a place available on the days that they needed a place, for the hours that they needed it, was considered equivalent to them winning the care and education lottery. Far more commonly reported are significant adjustments that parents and families are required to make for early childhood care and education to work for their child, their workforce participation, and their family more broadly. Some noted that in certain areas, there is simply an insufficient number of services operating, or only partial coverage of the breadth of ECEC service types (e.g. there may be some centre-based options, but few if any family day cares or vice versa).

For parents struggling to find care where services are oversubscribed, finding an available place at a preferred service, is considered the first hurdle. Some expectant or new parents, hearing horror stories about ECEC waitlists, were prompted to put their names down on waitlists. This sometimes had the effect of temporarily alleviating concern, though they may not have considered that the days they would need may not be available.

Parents left without a place when needed, reported experiencing significant stress as their savings or financial buffer eroded, while their workplaces applied pressure on them to return to work. This has the potential to have a detrimental impact on family stress and mental health, as well as affecting the emotional climate in which young children are being cared for.

In order to secure a care and education place, parents described having to repeatedly contact centres to keep themselves top of mind and help move themselves up the waitlist. This was described as both a stressful and uncertain endeavour, that only sometimes achieved results. Once a place was offered, parents tried their best to make it work, even if the days and times did not match what they were needing. This sometimes required negotiating different working days with employers or making other adjustments to children's care, informal arrangements, ongoing appointments and so on.

Some care and education types were considered inherently inflexible, which parents may have already factored into their choice, however, rigidity around opening hours, and picking up (or dropping) days was perceived to exist across the board in formal ECEC.

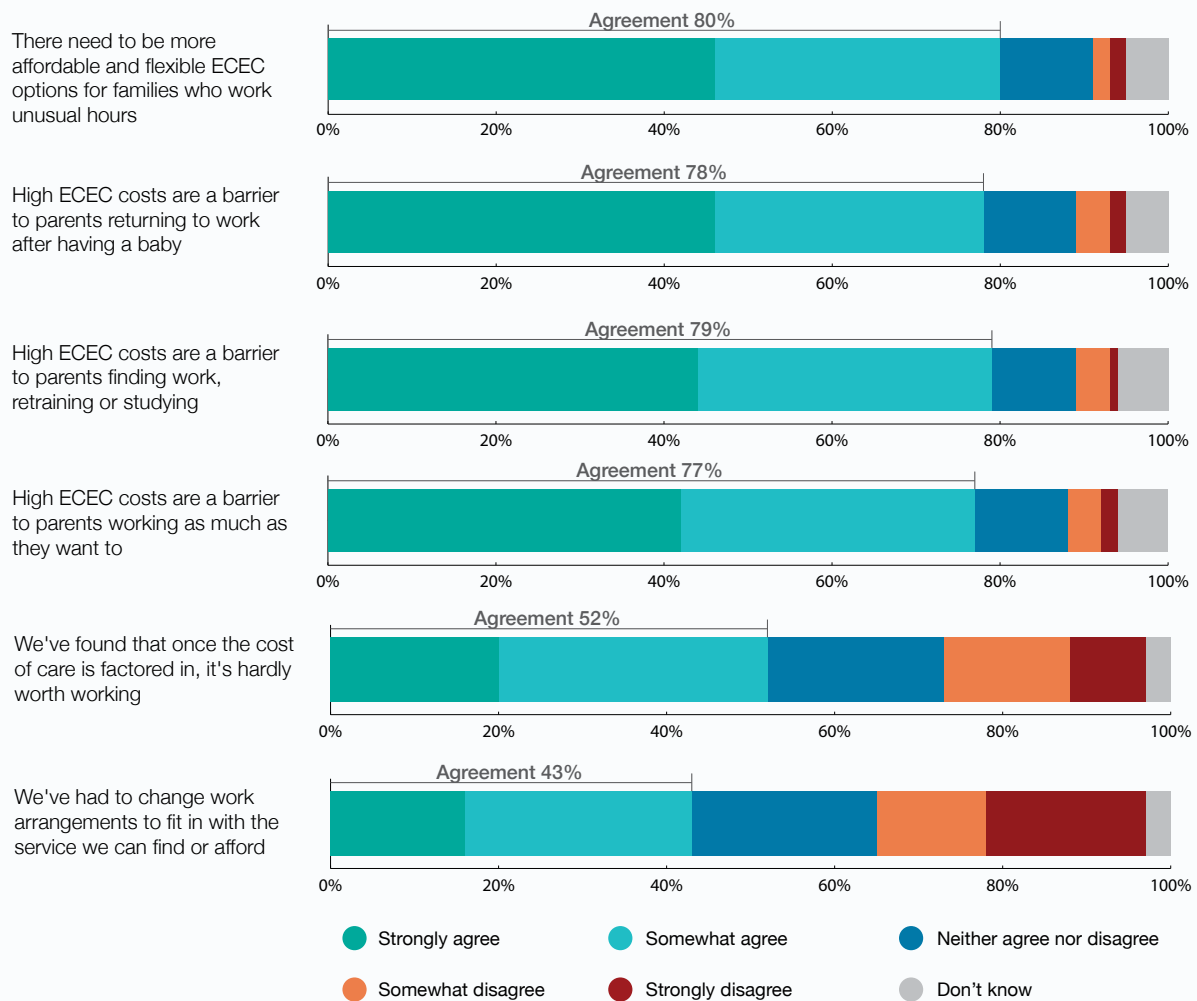
IMPACT OF ECEC ON WORKFORCE PARTICIPATION

The survey also presented participants with six more specific statements exploring the impact of ECEC (particularly ECEC affordability) on workforce participation. The level of agreement/disagreement with each statement is shown in Figure 16.

As illustrated, parents widely perceived workforce participation to be impacted by ECEC affordability issues, and a lack of flexibility in the system; between 77 per cent and 80 per cent of all parents with children 0-5 years not yet at school agreed with the first four statements in the chart below. Particularly, there was strong agreement not only that high costs are a barrier to parents returning to work after having a baby (46 per cent strongly agree), but that they are a barrier both to parents finding work, retraining or studying (44 per cent strongly agree) and working as much as they want to (42 per cent strongly agree). Almost half (46 per cent) strongly agreed that there needed to be more both affordable *and flexible* ECEC options, specifically for families who work unusual hours.

Those parents currently accessing paid care and education were also asked to directly consider their own experience. Just over half (52 per cent) agreed that ‘we’ve found that once the cost of care is factored in, it’s hardly worth working’, with one in five (20 per cent) strongly agreeing with this statement. Just over two in five (43 per cent) agreed (16 per cent strongly) that ‘we’ve had to change work arrangements to fit in with the service we can find or afford’.

Figure 16. Parents’ views on connection between ECEC and workforce participation (including personal experiences)



Question: And to what extent do you agree or disagree with each of these statements about ECEC?; Thinking about your experiences relating to the care and education of your 0-5 year old child/ren, please indicate how much you agree or disagree that...



QUALITATIVE FINDINGS

The impact of the ECEC system on participation in the workforce was raised repeatedly by qualitative research participants. They described situations where there was a clear link between whether and how much they worked and the affordability of, access to and flexibility of care and education options, including:

- Parents who elected to work fewer hours/part-time to fit in with available ECEC options.
- Mothers who decided to delay going back to work altogether because the financial benefits did not outweigh the costs (financial and otherwise).

“

...it wasn't worth me taking them to childcare and then going back to work. By the time I got to work...it would cost more to put him in childcare, like I'd only be making maybe \$10, literally a day. So there was no point... after I paid the childcare and transport and stuff, my lunch, I calculate all that into it as well, so yes, it really just wasn't worth it...

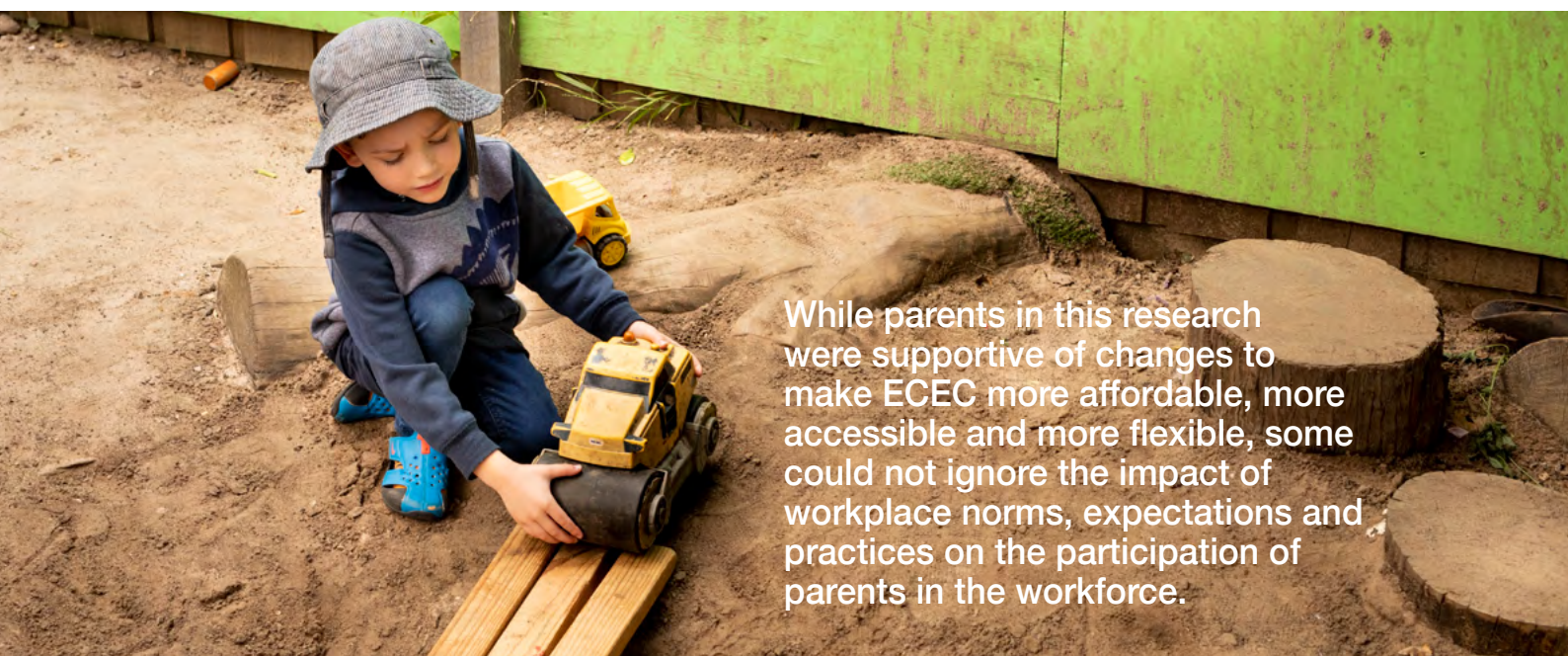
MOTHER OF TWO-YEAR-OLD, ABORIGINAL AND TORRES STRAIT ISLANDER, SINGLE PARENT, 35–39 YEARS, LOW INCOME, METROPOLITAN AREA

- Parents who decided to study or retrain because their previous workplace/industry required a pattern of work or working hours that did not accord with ECEC (such as long hours, weekends or irregular hours).
- Mothers who took a change of direction, a more modest job than what she was capable of, to fit in better with preferred ECEC options (such as pre-school/kinder).

This impact was faced by parents, irrespective of household income or education level, though those on higher incomes were better placed to find alternative arrangements such as nannies, or to weather the financial challenges of paying for ECEC at the same time as studying or retraining.

While parents in this research were supportive of changes to make ECEC more affordable, more accessible and more flexible, some could not ignore the impact of workplace norms, expectations and practices on the participation of parents in the workforce. In this research, the challenges faced by parents in securing suitable, affordable ECEC, were seen to be the result of an unhappy marriage between issues in workplace systems, and issues in the ECEC system.

When offered the opportunity to look at how to address lower parent workforce participation rates, parents indicated that improvement to care and education mentioned earlier needs to be mirrored by workplace changes aimed at making work more accommodating to parents. Suggestions included more flexible parental leave, greater acceptance of and improved attitude among employers to flexible/part-time work, and better structuring of jobs to support job sharing/work from home/flexible/part-time options.



While parents in this research were supportive of changes to make ECEC more affordable, more accessible and more flexible, some could not ignore the impact of workplace norms, expectations and practices on the participation of parents in the workforce.

HOW CAN THE SYSTEM BE BETTER DESIGNED?

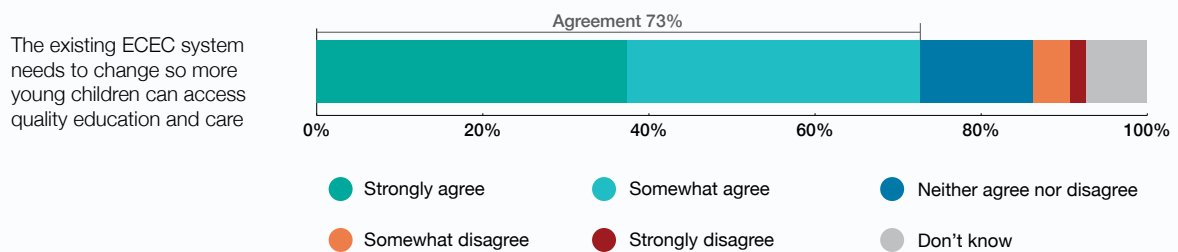
SUPPORT FOR SYSTEM-LEVEL CHANGES

The survey highlighted how parents recognise the dual imperatives of the ECEC system – enabling access to quality early learning and workforce participation – and strong support for system-level changes,

There was strong agreement from parents that the existing system needs to change – 85 per cent agreed the early childhood care and education system needs to change to better support parents to work and/or enable more children to access quality education and care.

Almost three quarters (73 per cent) of all parents of children 0–5 years not yet at school, agreed with the idea that ‘the ECEC system needs to change so more children can access quality education and care – with 37 per cent strongly agreeing and a further 35 per cent somewhat agreeing.

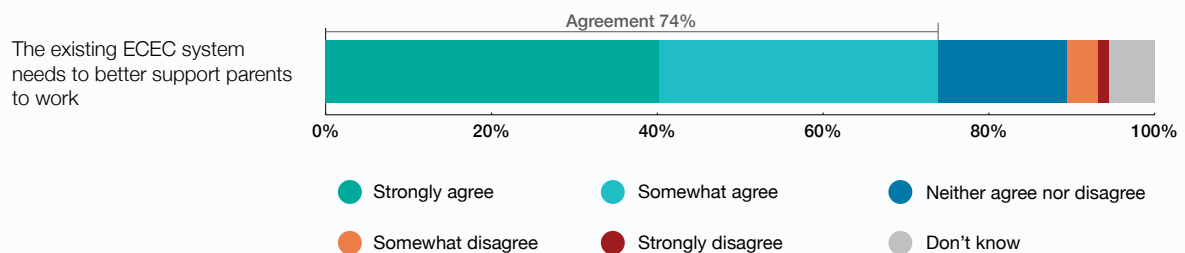
Figure 17. Support for change to the ECEC system



Question: And to what extent do you agree or disagree with each of these statements about ECEC?

Forty per cent of parents strongly agreed that ‘the existing ECEC system needs to better support parents to work’, with a further 34 per cent somewhat agreeing with this idea. Around one in five were unable to agree or disagree (15 per cent neither agreed nor disagreed and five per cent did not know how to respond).

Figure 18. Support for system change to better support workforce participation



Question: And to what extent do you agree or disagree with each of these statements about ECEC?

ENSURE QUALITY AND TRANSPARENCY

In the qualitative research, parents discussed that optimally there would be mechanisms in place to ensure consistent, high quality across all ECEC services.

Where this was not entirely possible, transparency around how services differed (by way of staff to child ratios, staff qualifications and stability, mechanisms for providing feedback to or accepting input from parents etc.) and what was included within service fees was considered essential, to allow for comparison across service types and individual service providers.

Parents raised and widely supported easy to access central information about ECEC options available, the pros and cons of each, what could be expected, and how to choose between different service providers.

The idea of a system where those willing or able to pay more would be able to secure higher quality ECEC was not favoured.

INCREASE ACCESS TO ECEC AND EMBED MORE FLEXIBLE OPTIONS

When offered the opportunity to comment on improvements to service access and flexibility, parents suggested:

- Government involvement in mandating access – it was suggested the rules could be in place as currently surround pharmacies, where maximum numbers are allowed in certain locations, to help better and more even coverage (in the case of ECEC, though, they would like to see both more and more evenly spread services)
- Government involvement in ensuring that at least some services were obliged to offer greater flexibility, particularly offering:
 - casual days
 - extended opening hours
 - extended days of opening (Saturday)
 - the ability for parents to have days that were set, but not necessarily weekly (e.g. fortnightly days).

ENSURE OUT-OF-POCKET FEES FOR ECEC ARE REALISTIC

When given the opportunity to discuss possible improvements to the ECEC system in terms of affordability, such as in the co-creation session, parents suggested that the government should be concentrating on ensuring that out of pocket care and education fees paid by parents are 'realistic'. They felt the focus should be on achieving this, and the mechanisms required to support this, whether it be further subsidising of fees, or the government imposing limits on what services are allowed to charge.

CONTINUE WORK TO RECOGNISE THE VALUE AND IMPORTANCE OF THE ECEC WORKFORCE

Seventy-two per cent of surveyed parents agreed that ‘current wages and working conditions for ECEC educators and carers need to be improved’ – which increases to 80 per cent among parents who believe educators and carers have a significant impact on outcomes.

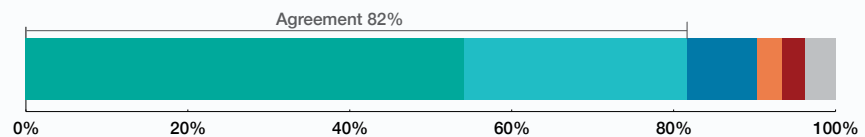
PROVIDE GOVERNMENT FUNDING FOR PRESCHOOL

Eighty-seven per cent of surveyed parents supported government funding of at least one year of free/subsidised pre-school.

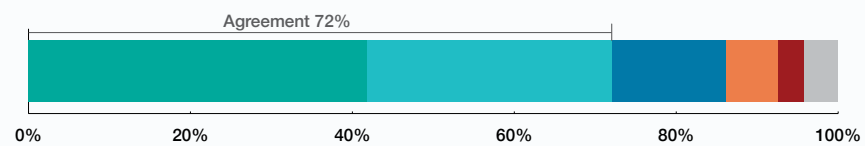
- 82 per cent agree that government funding should support a single year of free subsidised pre-school.
- 72 per cent agree that government funding should support two years of free or subsidised pre-school.

Figure 19. Support for government funding of pre-school

Govt funding should ensure every child has free or subsidised access to a pre-school program delivered by a qualified early childhood educator for the one year before they start primary school



Govt funding should ensure every child has free or subsidised access to a pre-school program ... for the two years before they start primary school



● Strongly agree ● Somewhat agree ● Neither agree nor disagree
● Somewhat disagree ● Strongly disagree ● Don't know

Question: And to what extent do you agree or disagree with each of these statements about ECEC?

MAKE CHANGES TO THE CHILD CARE SUBSIDY

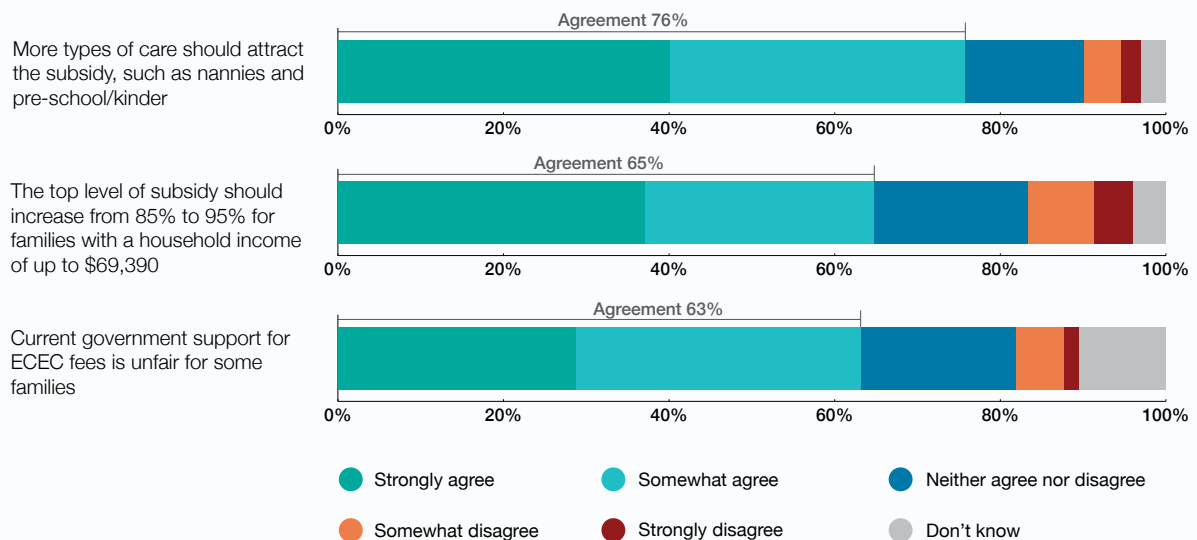
In the quantitative survey, parents were presented with basic information about the Child Care Subsidy, including the maximum percentage of fees that are covered, how the percentage differs according to household income, what types of services it applies to, and the activity test. They were then presented with ‘ways that the current arrangement could be adjusted’ and for each asked how strongly they agreed/disagreed with the idea. The findings are presented in Figure 20.

Agreement was strongest that more types of care and education should attract the subsidy (40 per cent strongly agree). This aligns with possible improvements to the ECEC system discussed in the co-creation session. Parents in this research favoured the CCS being extended to cover informal paid care and education (such as nannies) to address parent choice, child needs, access and flexibility.

During discussions in the qualitative research, tax-deductibility was also raised as an option. Most parents (except those on the very highest incomes) said tax deductions would be of limited value to them as they would simply not be able to afford to pay for education and care through the year without the subsidy. From these parents' perspectives, they could not hold out until tax return time to recoup some of the cost, and the amount they would be recouping would not be adequate. Among high-income earners, tax-deductibility was seen as an option more favourable than the current situation (i.e. not being eligible for subsidies). However, they were more in favour of extending the CCS to families with higher incomes, than making ECEC tax-deductible.

There was agreement from 65 per cent of parents that the top level of subsidy should increase from 85 per cent to 95 per cent for families with a household income of up to \$69,390. There was also agreement from parents that currently government support for ECEC fees is unfair for some families, with which 29 per cent strongly agreed and a further 34 per cent somewhat agreed.

Figure 20. Support for changes to CCS arrangements



Questions: There are some ways that the current arrangement could be adjusted. Please indicate the extent to which you agree or disagree with each of the following statements about ECEC for children 0-5 not attending primary school.; And to what extent do you agree or disagree with each of these statements about ECEC?



We are an independent national enterprise working to create positive change in Australia's early childhood education and care (ECEC) system.

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