

# Mapping long day care and non-government preschool in South Australia

Royal Commission into Early Childhood Education and Care  
March 2023

# Glossary of terms in this report

Acronym	Term	Definition
ABS	Australian Bureau of Statistics	Australia's national statistical agency
ACECQA	Australian Children's Education and Care Quality Authority	The independent national authority that assists governments in administering the National Quality Framework (NQF) for children's education and care
CaFHS	Child and Family Health Service	The Child and Family Health Service provides free support for all children 0–5 years living in South Australia
CBDC	Centre-Based Day Care	ECEC that happens at a facility, as opposed to Family Day Care
CCS	Child Care Subsidy	Commonwealth subsidy for eligible families to help with the cost of child care fees
CCSS	Child Care Subsidy System	The dataset containing Child Care Subsidy information
ECEC	Early Childhood Education and Care	The ECEC sector comprises services to care for and educate children, outside the school system. This report primarily focusses on ECEC prior to school, for children predominantly aged 0–5
FDC	Family Day Care	Child care services offering care by a qualified educator in the home environment
LDC	Long Day Care	Centre-based services providing child care for children aged from birth to 6
NQF	National Quality Framework	The NQF includes: National Law and National Regulations; National Quality Standard assessment and quality rating process; national learning frameworks
NDIS	National Disability Insurance Scheme	The National Disability Insurance Scheme is a scheme of the Australian Government that funds costs associated with disability
NWC	National Workforce Census	The 2021 Early Childhood Education and Care National Workforce Census collected information from child care services on staff, service usage, children with additional needs and access to preschool programs
OOP	Out-of-pocket	Costs paid directly by families, after accounting for the Child Care Subsidy
OSHC	Out of School Hours Care	OSHC is available to school-aged children before and after school, and through school holidays at some sites
PRA	Preschool Reform Agreement	A four-year national reform agreement to strengthen the delivery of preschool and better prepare children for the first year of school. The agreement runs from 2022 to 2025 <sup>1</sup>
PSK	Preschool/kindergarten	In this report PSK refers to services providing preschool programs. <i>A preschool program in South Australia is delivered by a degree qualified early childhood teacher registered with the Teacher's Registration Board of South Australia that at a minimum, meets National Quality Framework qualification requirements, with a teacher:child ratio of 1 to 11<sup>2</sup></i>
SA2	Statistical Area 2	SA2s are medium-sized general purpose areas defined by the Australian Bureau of Statistics. Their purpose is to represent a community that interacts together socially and economically. SA2s generally have a population between 3,000 and 25,000 with an average of about 10,000 people. SA2s in remote and regional areas generally have smaller populations than those in urban areas <sup>3</sup>
SA3	Statistical Area 3	SA3s are areas defined by the Australian Bureau of Statistics which cluster groups of SA2s that have similar regional characteristics. In general, SA3s are designed to have populations between 30,000 and 130,000 people <sup>4</sup>
SA4	Statistical Area 4	SA4s are geographic areas built from whole SA3s, with boundaries representing labour markets and the functional area of Australian capital cities. Most SA4s have a population above 100,000 people. In regional areas, SA4s tend to have smaller populations of 100,000 to 300,000 people <sup>5</sup>

## Foreword

The Royal Commission has had a unique opportunity to build a picture of the ECEC sector in South Australia.

The data sets compiled here are not commonly available to policy makers, and it is a privilege of having the powers of a Royal Commission to bring them together.

I am particularly grateful to the long day care and non-government preschool sector, including their peak bodies Australian Childcare Alliance (ACA), Community Children's Centres SA (CCS), and Early Learning and Care Council of Australia (ELACCA), for encouraging the completion of the sector survey.

This has provided incredibly rich data and is telling a nation-first story about the role ECEC plays beyond education and care in supporting families and children, as well as in providing insight into the stresses that workforce turnover are placing on services.

**Hon Julia Gillard AC**  
*Royal Commissioner into  
Early Childhood Education and Care*

## Structure of the report

The report is organised thematically into a series of overviews of key topics. These are:

	Sector overview	<u>Page 5</u>
	Section 2: Long day care in South Australia	<u>Page 7</u>
	Section 3: Patterns of long day care use	<u>Page 12</u>
	Section 4: Connections to the community	<u>Page 16</u>
	Section 5: Workforce and quality	<u>Page 20</u>
	Section 6: Fees and affordability	<u>Page 24</u>
	Section 7: Interest in three-year-old preschool provision	<u>Page 27</u>
	Section 8: Non-government preschool and other services	<u>Page 29</u>
	Appendix	<u>Page 32</u>

This report contributes to the evidence base of the Royal Commission, focusing specifically on the prevalence and use of the non-government ECEC sector in South Australia.

## The Royal Commission

The Royal Commission into Early Childhood Education and Care (the Royal Commission) was established in October 2022 to explore further options to support South Australian families and their children in early years. The Royal Commission is inquiring into the following as part of its *Terms of Reference*:

1. The extent to which South Australian families are supported in the first 1000 days of a child's life, focused on opportunities to further leverage Early Childhood Education and Care (ECEC) to enable equitable and improved outcomes for South Australian children.
2. How universal quality preschool programs for three and four-year-olds can be delivered in South Australia, including addressing considerations of accessibility, affordability, quality and how to achieve universality for both age cohorts. Consideration of universal three-year-old preschool should be undertaken with a view to achieving this commencing in 2026.
3. How all families can have access to out of school hours care at both preschool and primary school ages, including considerations of accessibility in all parts of the state, affordability and quality in public and private settings.

## The ECEC policy and operating context

For more than a decade, the ECEC sector has tackled a body of ambitious reform. The introduction of the National Partnership Agreements on Universal Access (now titled the *Preschool Reform Agreement*) and the National Quality Framework fundamentally shifted the nature of collaboration between levels of government, the role of ECEC, and the awareness and importance of early years in the consciousness of families. These reforms placed an important focus on quality improvement and the need to balance objectives such as workforce participation and educational and developmental outcomes for children.

Despite these reforms and improved collaboration, the quality of information available to inform policy decisions, program design and market intervention remains poor, fragmented and held by a variety of agencies, regulators and other organisations.

The roles and responsibilities of different levels of government, and the prevalence of a large and diverse market of non-government providers (both profit and not-for-profit), results in a limited ability to develop a holistic picture of family needs, market performance and outcomes for children. A common challenge is that often data is collected for specific or limited purposes (for example, funding) or collected with insufficient frequency to ensure analytical validity (for example, quality or workforce).

The national ECEC landscape is rapidly evolving and current policy priorities and reviews such as inquiries by the Productivity Commission and Australian Competition and Consumer

Commission are likely to impact funding and delivery in South Australia and subsequently the interpretation of the data presented in this report. Additionally, in South Australia, changes such as mid-year entry to preschool and reception will further change the landscape of ECEC provision.

Notwithstanding these limitations, this report represents a rare opportunity to describe the contribution of the non-government sector to the ECEC landscape in South Australia. In particular, this report focuses on long day care and how the sector is used by South Australian families. Across Australia, the non-government ECEC sector has played a critical role in the implementation of reforms, providing capacity for more families and their children to participate in a formalised program.

To support a stronger understanding of the prevalence and use of this sector, the Royal Commission has partnered with Deloitte Access Economics to build a comprehensive picture of non-government ECEC provision in South Australia. This includes collecting and compiling data to report on the characteristics of non-government preschools and the long day care sector.

## The purpose of this report

This report is intended to support the Royal Commission to undertake its inquiry into universal quality preschool programs (*Terms of Reference* number 2), particularly in relation to the provision of three-year-old preschool. This report provides a base of evidence to aid deliberations and further engagement with the sector and is not analytically comprehensive, given the extent of data considered. It is also not intended to draw any *conclusions* or *findings* in relation to the future provision of three-year-old preschool. This report incorporates and presents information from the following data sources:

1. The Australian Children's Education and Care Authority (ACECQA) National Register, which is publicly available, and was accessed on 29 November 2022, and updated with 2022 Q4 data on 26 January 2023.
2. A sector survey, conducted by Deloitte Access Economics, that canvasses issues such as the activities on offer, co-location with other services, the capacity to expand for three-year-old preschool, staffing, and a limited number of questions to validate other data sources, completed by 337 non-government services, between January and February 2023.
3. Child Care Subsidy System (CCSS), supplied by the Commonwealth Department of Education on January 11 2023, for January 2019 – September 2022 (inclusive).
4. National Workforce Census, supplied by the Commonwealth Department of Education on 11 January 2023, relating to April/May 2021.
5. Funding data supplied by the South Australian Department for Education on 17 January 2023, relating to the Preschool Reform Agreement in financial and calendar years 2019 – 2022.

The report provides an initial presentation of key aspects of this data including the provision of LDC (by location, provider type and provider size), patterns of LDC use, additional supports and activities provided to families by long day care services, workforce and quality, fees and affordability. The report also includes a snapshot of other non-government services.

## Snapshot of the SA ECEC sector

A defining feature of the South Australian ECEC sector, compared to Australia, is the large volume of provision by the government sector. Where the national average is 11% of services, SA's share is 44%, considering all forms of ECEC (preschool, long day care, out of school hours care, and other arrangements).<sup>1</sup> This is driven predominantly by preschool provision, with most (92%) dedicated preschools either standalone government or school-based sites,<sup>2</sup> compared to 33% nationally.<sup>3</sup>

Of South Australia's non-government services, half of long day care provision is for profit (below the national average), and 35% is not-for-profit, with the remaining delivered by schools and other providers.<sup>4</sup> 2 in 5 long day cares are owned and operated by a provider with only one service, the same as the national average, highlighting the role small and medium sized businesses play in the provision of ECEC.<sup>5</sup> 4 out of 5 long day care services are located in Adelaide.<sup>6</sup>

Services report going above and beyond their core service remit, with a range of holistic activities and services to support children, families and the community. On average, long day care services report they offer or support access to an additional 8 activities.<sup>7</sup> These are tailored to meet community needs, with different activities based on the demographics, location and advantage of the local community – such as toy libraries, food programs, speech pathology, and occasional care.

There are pockets of extensive experience within the sector, but these contrast with high levels of turnover and reported challenges in recruiting and retaining staff. 18.5% of long day care centres across SA have a temporary staffing waiver, compared to 16.4% nationally,<sup>8</sup> and nearly half of long day care services use staff from recruitment agencies.<sup>9</sup> Services report that the most significant challenge in the provision of more ECEC is workforce related, with the primary concern being the supply of qualified early childhood teachers.<sup>10</sup> Only 9% of long day care staff are paid more than 10% above the award rate.<sup>11</sup>

## National comparison

### South Australia



92% of PSKs are government run



47% of LDCs and PSKs are private for profit or not-for-profit



31% of LDC services are run by large providers\*



53% of LDCs are delivered by for profit providers

\* Over 8 services per provider

### Australia



33% of PSKs are government run



85% of LDCs and PSKs are private for profit or not-for-profit



30% of LDC services are run by large providers



69% of LDCs are delivered by for profit providers

Source: Deloitte Access Economics (2023); ACECQA (2023)

## Community functions

4 in 5 LDCs provide access to speech pathology and occupational therapy

1 in 3 LDCs provide access to a foodbank

1 in 3 LDCs provide access to supports for families

1 in 3 children in Adelaide travel outside their neighbourhood for LDC

Source: Deloitte Access Economics (2023)

## Workforce

99% of LDCs have at least 1 staff member with 5 years of ECEC experience

20% of LDC centre directors are new to their role

96% of LDC workers are female, and half are paid at the award rate

1 in 4 LDCs say they use a temporary staffing service every fortnight

Source: Deloitte Access Economics, SA ECEC Sector Survey (2023); Department of Education (2023)<sup>1</sup>

# Section 1

## Sector overview

The ECEC landscape in South Australia is diverse, comprising approximately 1,300 different services that support the dual objectives of education and development for children and workforce participation for South Australian families.

South Australia's ECEC services are offered by different providers, in varied settings, and are funded through a mix of government and family contributions

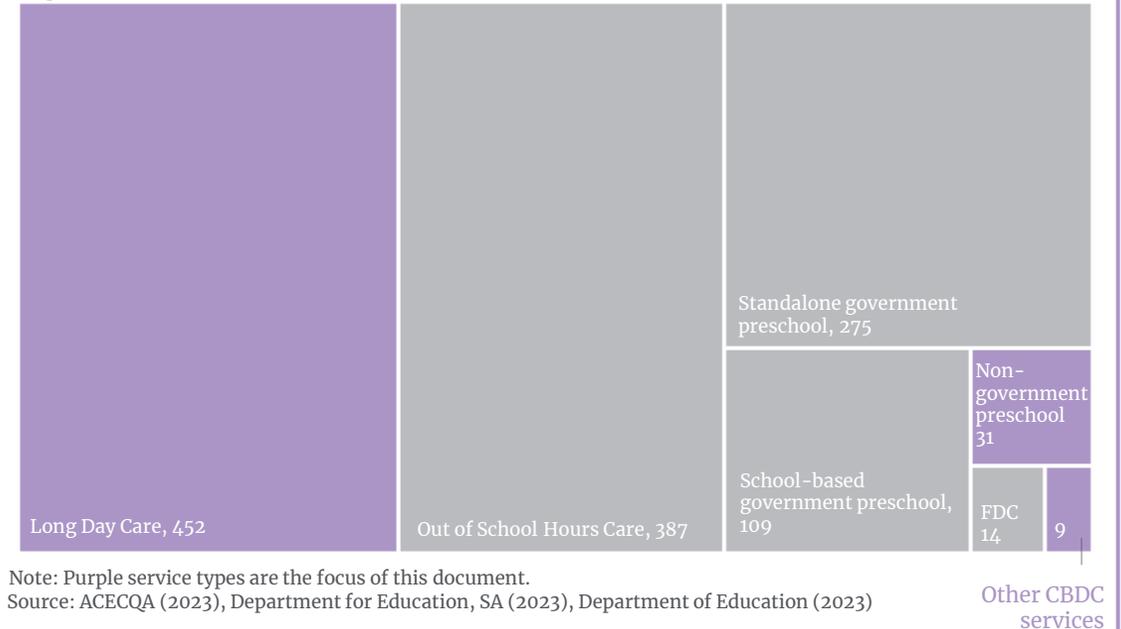
The ECEC sector in South Australia includes preschool, long day care, out of school hours care and alternate care arrangements, including family day care and in home care (see Figure 1). These ECEC service types are described below:

- **Long day care (LDC):** Centre-based services providing child care for children aged from birth to 6. 60 LDCs are open to school-aged children out of school hours. Eligible families receive Child Care Subsidy (CCS) funding from the Australian Government to help with child care fees.<sup>1</sup> Some LDCs deliver preschool programs as part of the Preschool Reform Agreement (PRA) (via funding provided by the SA Department for Education).
- **Preschools:** Services providing programs for children starting school within the next year (4 to 5-year-olds). Preschools are mostly operated by the SA Government, which operates standalone and school-based sites. Some non-government services run dedicated preschools, which are distinct from LDCs. Funding is delivered through the SA Government and the PRA, and prior agreements. A few three-year-old cohorts are currently eligible for preschool.<sup>2</sup>
- **Other Centre Based Day Care (CBDC) services:** There are an additional 9 other centre-based day care services operating in SA that are funded through the SA Government to provide non-standard education and care, and are not classified as preschools. For example, several are Multifunctional Aboriginal Children's Services and others are rural care services.
- **Out of School Hours Care (OSHC):** OSHC is available to school-aged children before and after school, and through school holidays at some sites. These are funded through the CCS, but are outside the scope of this report.
- **Family Day Care (FDC):** Child care services offering care by a qualified educator in the home environment. Educators may care for up to seven children at the same time, with no more than four children under school age. The service is for children from birth to 12 years. These are funded through the CCS, but outside the scope of this report.
- **In Home Care (IHC):** Child care delivered within a family's home, only available if other types of child care are not suitable or available. These are funded through the CCS, but outside the scope of this report.

Total government expenditure on ECEC in South Australia in 2021-22 totalled over \$781 million. This includes South Australian Government funding (approx. \$187 million), Australian Government funding, including CCS (approx. \$562 million), and funding through the PRA (approx. \$32 million).<sup>3</sup>

## ECEC services in SA

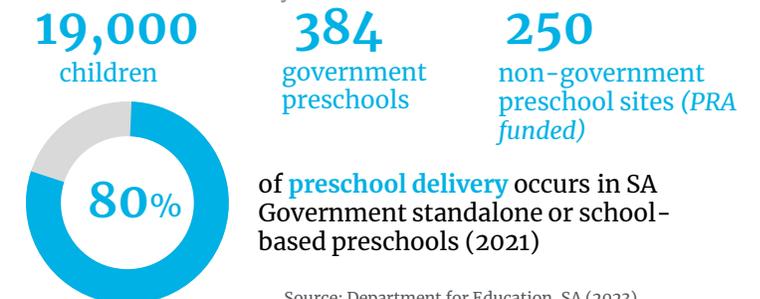
Figure 1: ECEC services in SA



## Preschool programs in SA

Chart 1: Preschool delivery in South Australia

Preschool programs are play-based, early childhood education programs for children in the year before school, delivered by four-year degree qualified early childhood teachers using the Early Years Learning Framework.

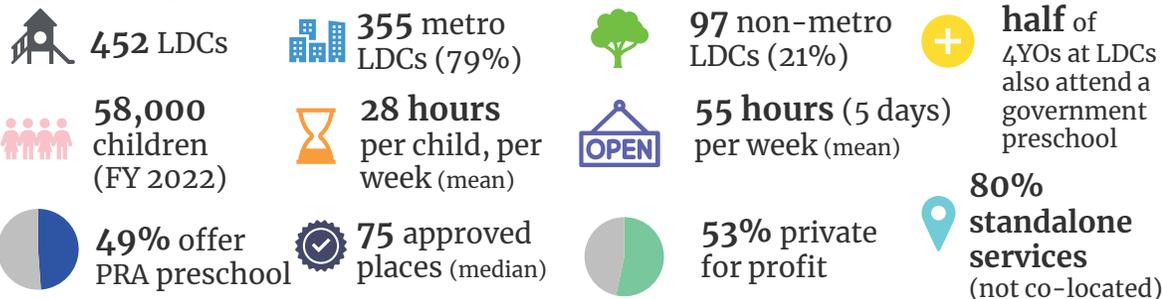


## **Section 2**

# Long day care in South Australia

Long day care (LDC) caters for more than 58,000 children in South Australia and supports workforce participation for families in addition to the provision of preschool programs.

## Long day care



Source: Deloitte Access Economics (2023); ACECQA (2023); Department for Education, SA (2023); Department of Education (2023)<sup>1,2</sup>

### LDC is a diverse sector owned and operated by a range of providers of different sizes

- Over half of LDCs (53%) are operated by **private for profit organisations**, while 35% are operated by private not-for-profit services. The remainder are operated by non-government schools, TAFE SA, and the local government sector.<sup>1</sup>
- Nearly **one-third** of services (140 LDCs) are run by **7 large providers** in South Australia - including one not-for-profit and six for profit providers.<sup>2</sup>
- 60%** (267 LDCs) of services are managed by **small providers** with just one or two services, with 194 (43%) of these operated by providers with one service. 87 of these solo services are not-for-profit (45%).<sup>3</sup>
- Not-for-profit** LDCs are more common in **non-metropolitan SA** than in metropolitan Adelaide (+9 percentage points).<sup>4</sup>

### LDC operates in conjunction with preschool through both direct provision and through children also attending a government preschool

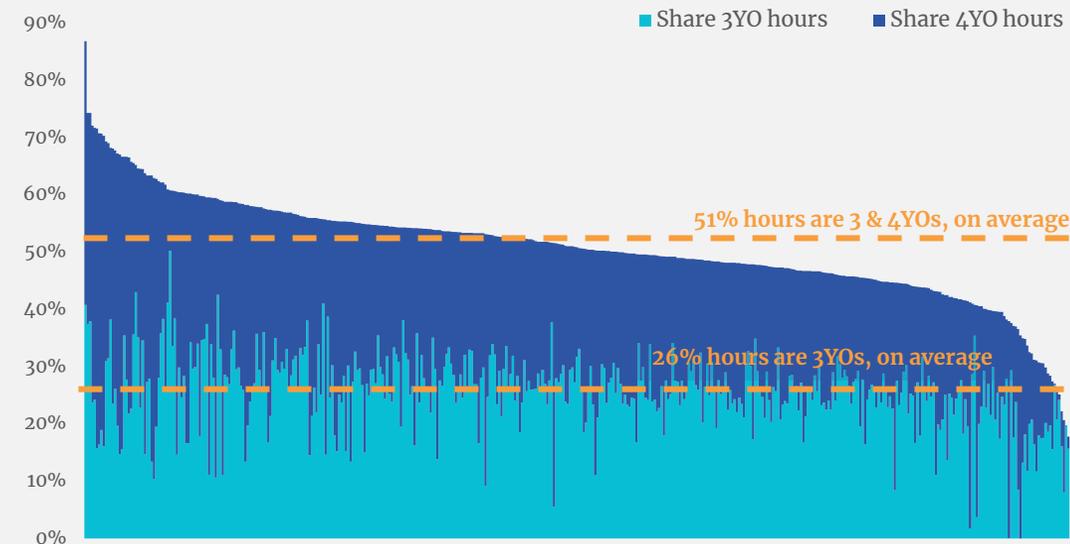
- Almost **half** of LDCs are funded, in addition to CCS, by the SA Government through the **PRA** to offer **preschool** programs to eligible four-year-olds (221 LDCs, 49%). Offering preschool is more common in metropolitan LDCs (53% metro, 33% non-metro).<sup>5</sup>
  - Importantly, **45%** of LDCs report that their **three-year-old children** are in a program equivalent to the current definition of preschool for four-year-olds.<sup>6</sup>
- Notably there is a strong intersection between LDC and the preschool sector in relation to four-year-old children. For almost half of LDCs, 60% or more of their four-year-old children attended a government preschool service.<sup>7</sup>
  - Even when the LDC reports offering PRA preschool, **44%** of LDCs indicate most families still choose for their four-year-old to attend a government service for preschool.<sup>8</sup>

### Usage of LDC by three and four-year-olds

**Just over half of LDC activity** relates to children aged three and four. When considering hours charged by age, on average 51% of hours funded by CCS are for three and four-year-olds, across all LDCs (Chart 2).<sup>9</sup> This is due to children of these ages being more likely to attend LDCs than children of other ages, and driven by educator-to-child ratios enabling a larger cohort. It underpins the significance of these cohorts for viability of service delivery.

There is some variability in the proportion of three and four-year-olds at individual LDCs, from 18% to 87% of hours charged. This relates to the ages that are offered by each LDC, the relative interaction between the LDC and nearby government preschools, the ages of children in the local community, and the staffing profile of the service. However, for half of LDCs, three and four-year-olds account for between 46-56% of hours.

Chart 2: Proportion of three and four-year-old charged hours, for each LDC, FY22



Source: Deloitte Access Economics, Department of Education (2023)<sup>2</sup>

[Chart notes](#)

LDCs in metropolitan South Australia are more likely to use temporary and casual workers, have higher average hourly fees, and have a higher share of staff that are paid significantly above the award.

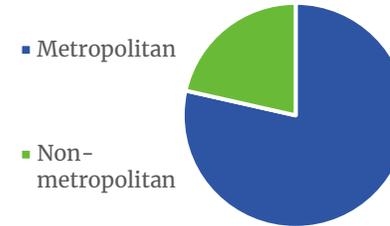
## Between metropolitan and non-metropolitan long day care services, patterns differ for the workforce and fees

- **Most (79%) LDCs** operate within the **metropolitan** boundaries of Adelaide (as shown [here](#)).<sup>1</sup> This is slightly higher than the share of children aged five and under living in metropolitan Adelaide at the time of the 2021 census (72%).<sup>2</sup>
- On average, **metropolitan services charge slightly higher fees** per hour to families than non-metropolitan services, with an average of \$11.37 in 2022, relative to \$10.80 for non-metropolitan LDCs.<sup>3</sup>
- From the sector survey, long day care services report they facilitate or offer additional activities beyond their core remit (see [Section 4: Connections to the community](#)). **Non-metropolitan services** tended to report providing access to or directly offering a fractionally **higher number of activities** for their children, families and communities than metropolitan services, at 8.8 compared to 8.2.<sup>4</sup> These activities were most often **facilitated through third party providers** in both metropolitan and non-metropolitan services.
- **Metropolitan** long day care services were significantly **more likely to use temporary and casual workers** than non-metropolitan services, with over half using temporary workers at all, compared to a third of non-metropolitan services.<sup>5</sup> However, an **equivalent share** of metropolitan and non-metropolitan long day care services used these workers **very often**, defined as weekly.
- Considering other workforce attributes, a slightly higher share of workers in **non-metropolitan** services were **new** within 12 months of the National Workforce Census, though a higher proportion of services had **significantly experienced** staff members and staff with at least **5 years tenure** at the service.<sup>6</sup>
- Metropolitan services were more likely to **pay staff significantly above the award rate**, with 10% of staff in metropolitan services paid more than 10% above the award rate, compared to 4% of those in non-metropolitan LDCs.<sup>7</sup>

## Metropolitan status

355 Metropolitan LDCs  
97 Non-metropolitan LDCs

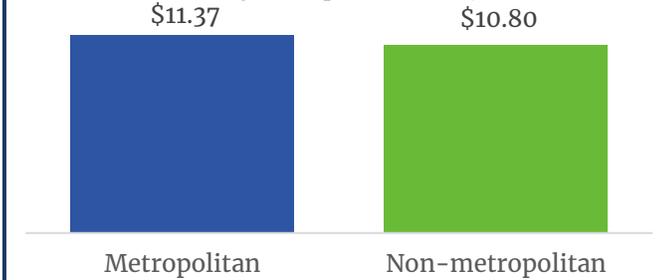
Chart 3: Proportion of long day cares by metropolitan status



Source: ACECQA (2023)

## Average hourly fees

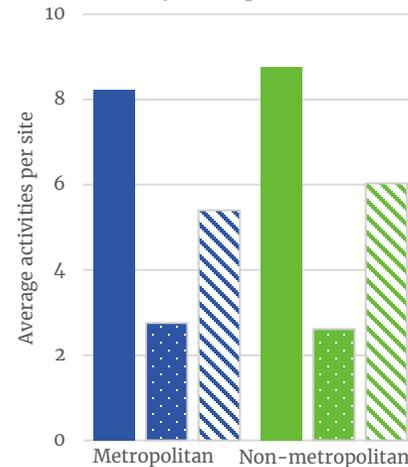
Chart 4: Mean fees by metropolitan status, 2022



Source: Department of Education (2023)<sup>3</sup>

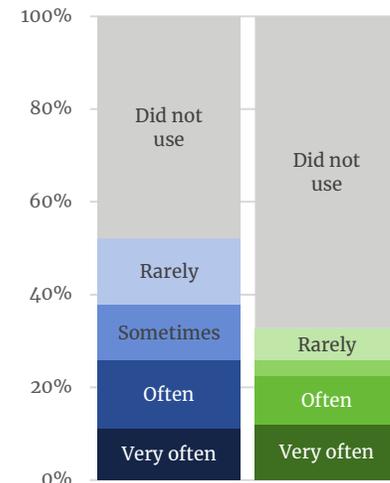
## Sector survey results

Chart 5: Average additional activities and services by metropolitan status



Offered or facilitated  
 Offered directly  
 Facilitated

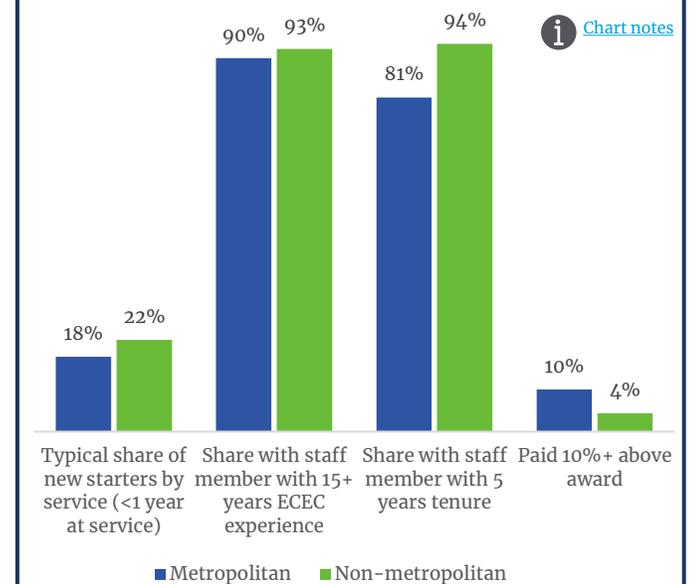
Chart 6: Frequency of temporary and casual workers by metropolitan status



Source: Deloitte Access Economics (2023)

## Workforce profile

Chart 7: Workforce profile by metropolitan status



Source: Department of Education (2023)<sup>1</sup>

# Long day care services – provider type

By provider type, for profit LDCs have higher shares of new staff and lower payment above the award, while not-for-profit LDCs are more likely to use temporary and casual workers.

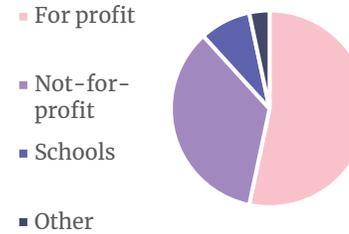
## By provider type, long day care services show most notable differences in their workforce data

- A little over half of LDCs are for profit, while 35% are not-for-profit. A small number of LDCs are run by independent or Catholic schools, and other providers, which include councils, and other government run services (such as TAFE SA).<sup>1</sup>
- On average, LDCs operated by independent and Catholic schools (collectively reported as schools) charged the highest fees per hour in 2022, at \$11.65.<sup>2</sup> These were similar to fees at for profit services, with an average of \$11.48 per hour.
- In the sector survey, LDCs operated by for profit and not-for-profit providers provided access to or directly offered a similar number of other activities, at 8.4 and 8.2 activities on average, respectively.<sup>3</sup> A higher number of services were offered directly at not-for-profit services. School LDCs reported fewer activities outside long day care (5.6), while the few other service providers supported or offered similar volumes of activities to profit and not-for-profit LDCs.
- Not-for-profit services were the most likely to use temporary and casual workers at all, though the share of LDCs using these workers weekly was higher in for profit services and school-based LDCs.<sup>4</sup>
- For profit services had the highest share of staff new to the service within 12 months of the National Workforce Census (NWC), at nearly a quarter (24%) of staff, compared to 16% and 17% at not-for-profit and school services, respectively.<sup>5</sup>
- Not-for-profit services almost universally had staff members with significant ECEC experience of 15 or more years (99%), which was higher than all other provider types.<sup>6</sup> These services also almost all had at least one staff member with 5 years of tenure at the site (96%). This was lower (74%) in for profit services, though it is noted that a higher share of for profit LDCs were newly opened within 5 years of the NWC.
- For profit services were the least likely to pay significantly above the award rate at the time of the NWC.<sup>7</sup>

## Provider status

241 For profit LDCs  
 158 Not-for-profit LDCs  
 Including 93 community managed, and 65 'Other'  
 38 Schools  
 Including independent and Catholic schools  
 15 Other

Chart 8: Proportion of long day cares by provider type



Source: ACECQA (2023)

## Average hourly fees

Chart 9: Mean fees by provider type, 2022



Source: Department of Education (2023)<sup>2</sup>

## Sector survey results

Chart 10: Average additional activities and services by provider type

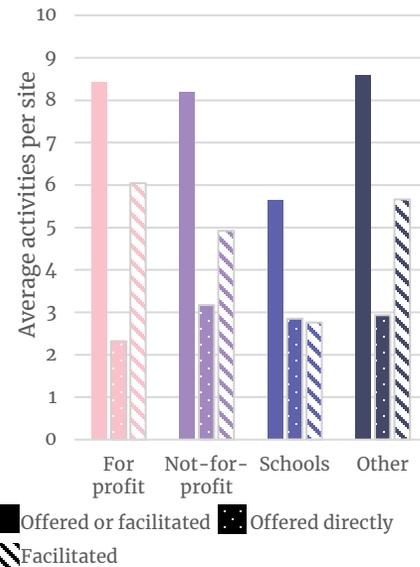
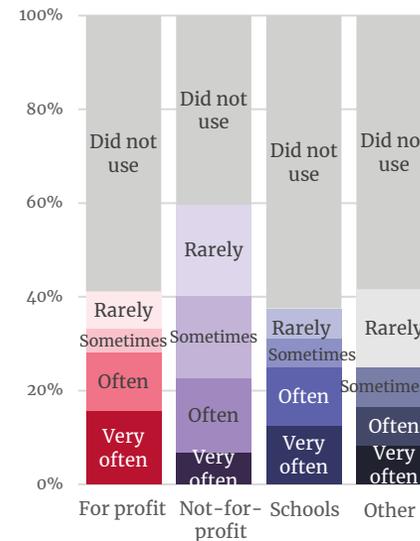


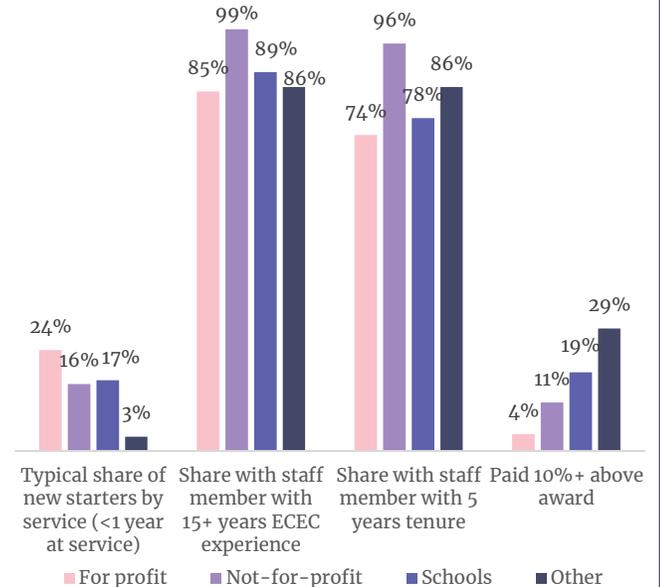
Chart 11: Frequency of temporary and casual workers by provider type



Source: Deloitte Access Economics (2023)

## Workforce profile

Chart 12: Workforce profile by provider type



Source: Department of Education (2023)<sup>1</sup>

# Long day care services – provider size

Services, regardless of provider size, support a similar number of additional activities, while services operated by larger providers are more likely to be using temporary and casual workers.

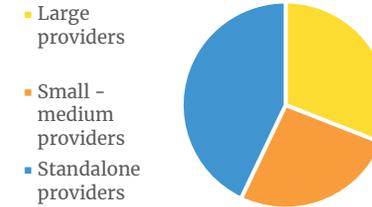
## A sizeable portion of services in the sector are operated by small-medium and solo service providers

- While 7 large providers run 140 LDCs in South Australia, 69% of services are run by providers with 8 or fewer services. A significant number of these (194 LDCs) are operated by a provider with only the one service (standalone providers).<sup>1</sup>
- Standalone providers charge lower fees per hour on average, relative to other providers, at \$10.76.<sup>2</sup>
- A similar number of other activities are offered or facilitated across services, regardless of provider size (8.3 for large providers, 8.5 for small-medium providers, and 8.2 for standalone providers).<sup>3</sup> Standalone providers offer a higher number of these activities directly.
- Large providers are the most likely to use temporary and casual workers, with only 36% of services operated by a large provider reporting they did not use any, compared to a majority of small-medium and standalone providers.<sup>4</sup>
- Standalone providers had the lowest share of new starters (17%) at the time of the National Workforce Census, and also the highest share of significantly experienced staff (94% of standalone providers of LDC had at least one staff member with 15 or more years of ECEC experience).<sup>5</sup>
- LDCs operated by small-medium providers had the highest share of new starters and the lowest share of services with a staff member with 5 years of tenure at the service. Most of these sites were newly opened services at the time of the NWC, with a higher proportion of services newly opened than other provider sizes.<sup>6</sup>
- Staff at LDCs offered by standalone providers were the most likely to be paid significantly above the award rate, with 12% of staff at these sites paid more than 10% above the award.<sup>7</sup> In contrast, staff at LDCs managed by large providers were the least likely to be paid significantly above the award.

## Provider size

7 large providers running 140 LDCs  
35 small - medium providers running 118 LDCs  
194 standalone providers running 194 LDCs

Chart 13: Proportion of long day cares by provider size

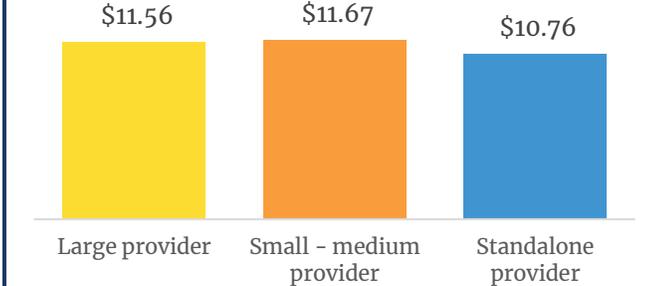


Note: provider size was calculated based on ACECQA provider IDs. Some operators may have subsidiaries with different IDs not captured.

Source: ACECQA (2023)

## Average hourly fees

Chart 14: Mean fees by provider size, 2022



Source: Department of Education (2023)<sup>2</sup>

## Sector survey results

Chart 15: Average additional activities and services by provider size

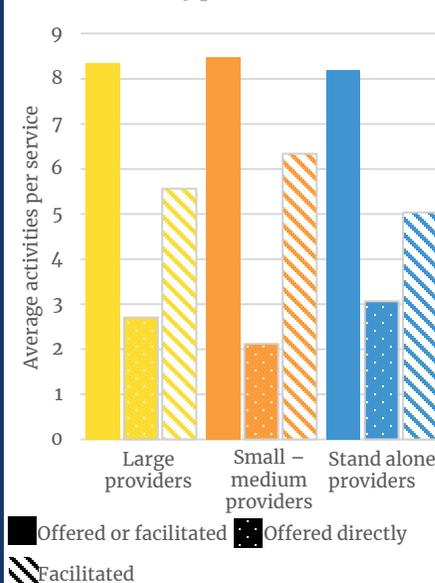
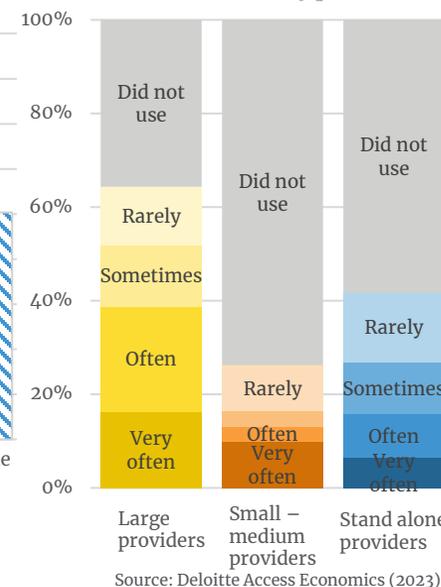


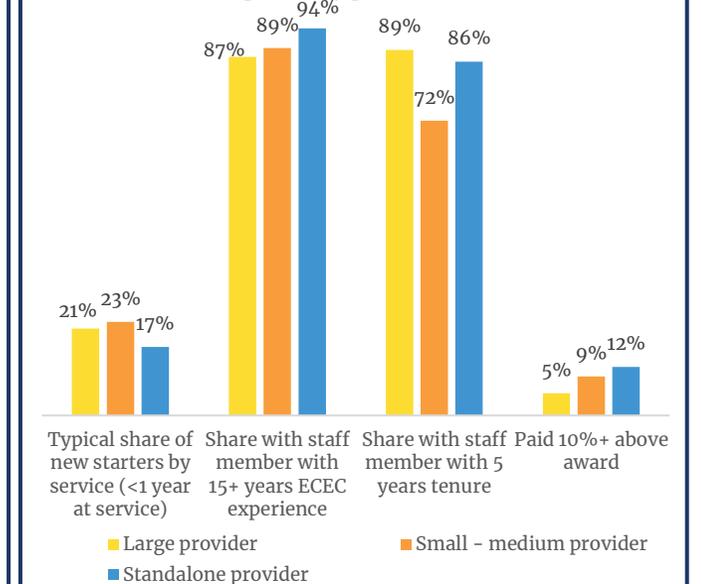
Chart 16: Frequency of temporary and casual workers by provider size



Source: Deloitte Access Economics (2023)

## Workforce profile

Chart 17: Workforce profile by provider size



Source: Department of Education (2023)<sup>1</sup>

## Section 3

### Patterns of long day care use

The LDC sector provides services for approximately 58,000 children across South Australia. However, families access the system differently based on the age of their children

When accessing ECEC, families use similar hours of ECEC per child per week, regardless of their child’s age, but are less likely to participate when their child is under the age of two.

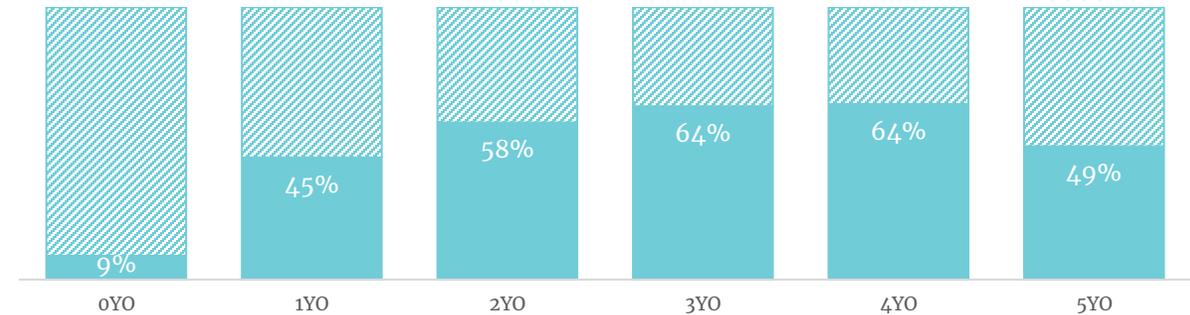
- The use of LDC is a function of **access** and the **characteristics of the family**. Family characteristics of relevance include **cultural background**, the **age** of the child, and features of **employment** – including employment sector, hours of employment, and the income structure of the family, such as the number of earners.
- Across LDCs with CCSS data, families purchase an average of **28.1 hours** of LDC per child per week.<sup>1</sup> Children, however, often **attend fewer hours** than the hours families purchase for each week. On average, children attend **19.5 hours** per week, or approximately 70% of hours purchased. This aligns with common practice in LDC of families paying to reserve a place and using it in a way that meets their needs, and these places being available by day rather than by hour.
- 1 in 10 children aged less than 1** in South Australia access LDC, which increases to nearly **1 in 2 for one-year-olds**, and just under **two-thirds of children aged 3–4**.<sup>2</sup> (See Chart 18). Children living in more disadvantaged areas (SEIFA quintile 1 and 2 ) are less likely to participate, with the biggest differences for children aged two and above.
- When children attend LDC, the average hours per child per week are **relatively consistent** by the child’s age. Children aged 5 have the fewest charged hours at LDC per week, at 25.9 hours per child per week, while three-year-olds have the most at 29.4 hours per child per week, on average.<sup>3</sup> (See Chart 19)

In South Australia, families tend to utilise more than one ECEC service once their children reach preschool age

- In South Australia, a high proportion of four-year-olds attending LDC also attend government preschool.<sup>4</sup> LDCs that report a high degree of overlap (80%–100% of four-year-olds attending a government preschool in addition to their long day care enrolment) have a similar level of average LDC hours purchased compared to those with low preschool overlap (0–20%). This implies that children aged four attend more ECEC overall.
- While children switch between services for LDC and preschool, children do not tend to switch between services within the LDC sector. The vast majority of children aged 0–5 only attend one LDC service throughout a given month. The CCSS data indicates that between 2–3% of children aged 0–5 years attend more than one LDC within a given month.<sup>5</sup>

<sup>5</sup>Estimated using CCSS data in May 2022, with May selected due to limited disruptions to attendance (i.e. limited public and school holidays). Note that this estimate may not be representative of enrolment patterns across all months.

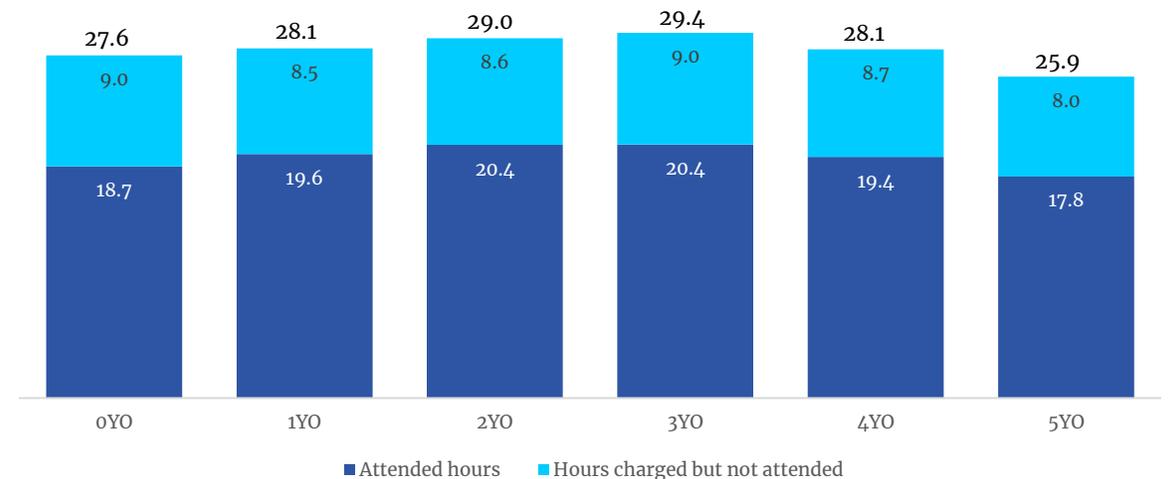
Chart 18: Estimated proportion of South Australian children accessing LDC by age, FY22



Note: estimated proportions of children participating by age are derived from the counts of children by their age at 30 June accessing LDC in FY22, as a proportion of the total South Australian resident population of the corresponding age from the 2021 census.

Source: Deloitte Access Economics, Department of Education (2022)<sup>2</sup>; Australian Bureau of Statistics (2021)

Chart 19: Average charged hours across children and weeks, by age of child, FY22



Note: Child by age at 30 June accessing LDC in FY22

Source: Deloitte Access Economics, Department of Education (2023)<sup>2</sup>; Australian Bureau of Statistics (2021)

Access to LDC varies for families across the State, with more places available – and higher hours of attendance – in metropolitan Adelaide.

**Children in metropolitan Adelaide have typically higher access to LDC places and attend for more hours per child per week**

- A measure of **LDC availability** can be established by comparing the **approved places** available in a region to the **child population** of the region.<sup>1</sup>
- All ten of the small Statistical Area 2 (SA2) regions with the most LDC places relative to the population are in **metropolitan Adelaide** (see Table 1). Clare and Tanunda are the non-metropolitan regions with the highest share of LDC approved places to children, both ranked in the top 20 regions.
- Considering the **average weekly hours** of LDC purchased for children from different regions, the highest average hours are for children living in the Port Pirie Surrounds, with the remaining top 20 regions all located within metropolitan Adelaide (Table 2).
- For children accessing LDC in metropolitan areas, charged hours approximate 3 days per week, assuming a 10 hour day, while for regional areas, it is closer to 2 days per week.

Figure 3: Map of the average LDC hours for children by home SA2 region in metropolitan South Australia, FY22

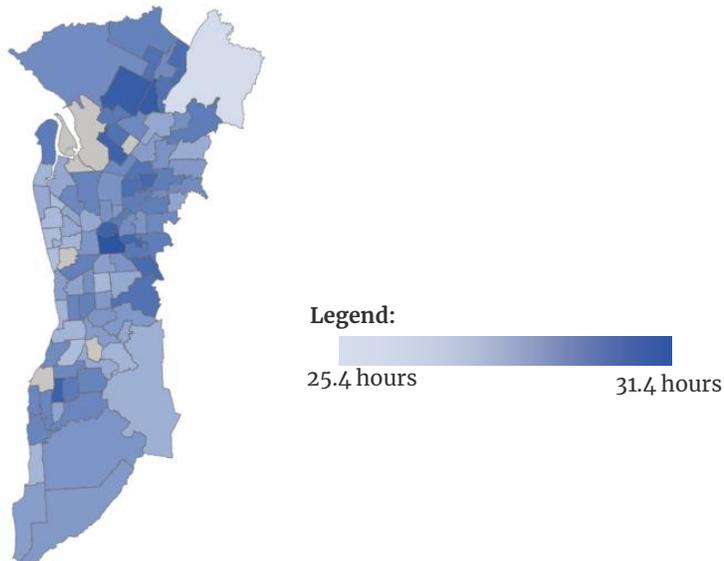


Table 1: LDC approved places relative to 2021 Census population aged 0-5

	Top 10 communities for ECEC approved places relative to the population aged 0-5	Places relative to population
1	Adelaide	2.2
2	Norwood	1.3
3	Golden Grove	1.1
4	Belair	1.0
5	Brighton	0.8
6	Lockleys	0.8
7	St Peters - Marden	0.8
8	Nailsworth - Broadview	0.7
9	Toorak Gardens	0.7
10	Bellevue Heights	0.7

Note: the Adelaide Airport SA2 has been omitted, having one ECEC service but no residential population.

Table 2: Highest and lowest average weekly hours of LDC purchased for children by home SA2 region, FY22

Metropolitan			Non-metropolitan		
	Highest average	Hours		Highest average	Hours
1	Adelaide	31.4	1	Port Pirie Surrounds	32.8
2	Elizabeth	31.2	2	Hahndorf - Echunga	29.5
3	Salisbury North	31.0	3	Mount Barker	29.3
4	Morphett Vale - West	30.9	4	Nairne	28.9
5	North Adelaide	30.8	5	Renmark	28.5
	Lowest average	Hours		Lowest average	Hours
1	One Tree Hill	25.4	1	Waikerie	17.1
2	West Beach	26.8	2	Quorn - Lake Gilles	17.6
3	Sheidow Park - Trott Park	26.8	3	Naracoorte Surrounds	17.8
4	Henley Beach	26.9	4	Karoonda - Lameroo	18.2
5	Royal Park - Hendon - Albert Park	26.9	5	The Coorong	19.4

Note: averages are based on where the child lives, rather than where they attend ECEC. Regions with fewer than 10 families have been omitted. Hours are averaged for all children accessing LDC.

# Patterns of long day care use

Over a third of children in metropolitan Adelaide travel outside of their local neighbourhood to attend LDC, reflecting family needs and preferences in accessing education and care.

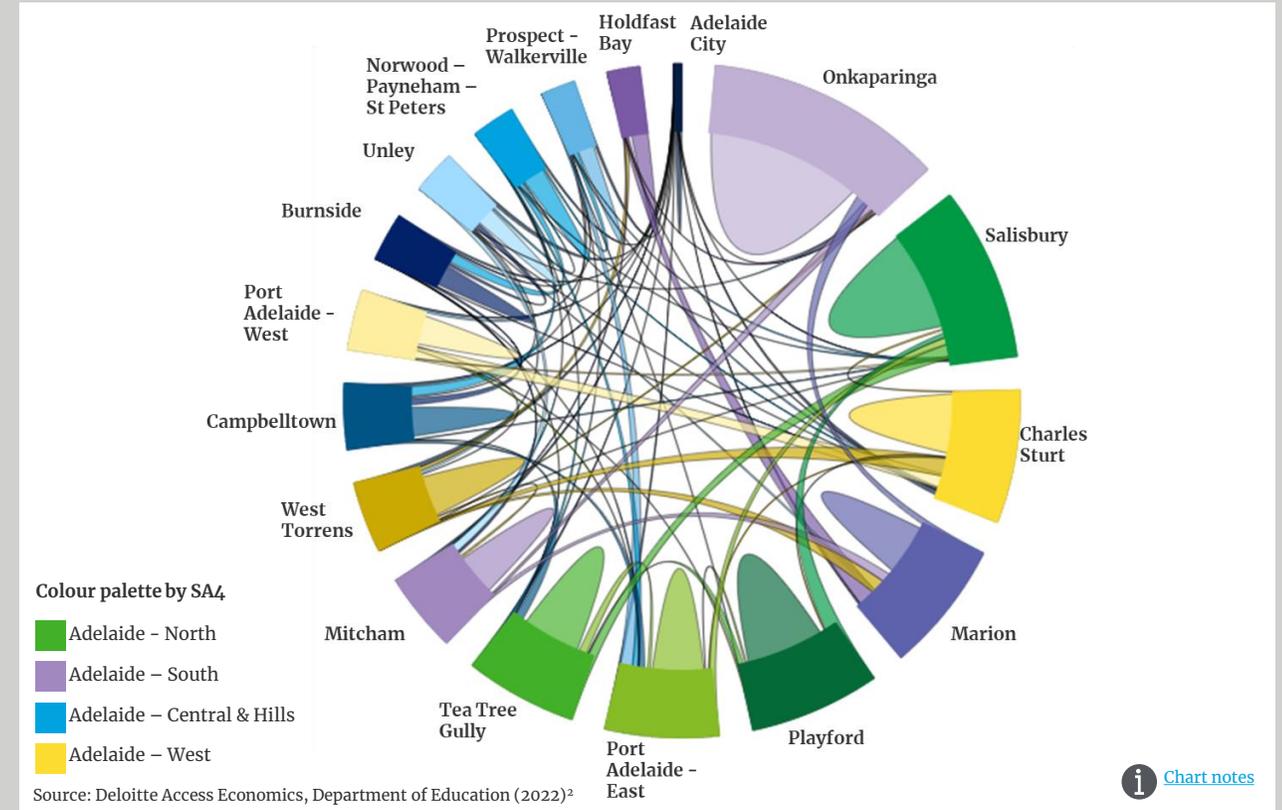
## Most children in regional South Australia access non-government ECEC within their home SA2, while metropolitan children more commonly move outside their home SA2

- Across South Australia in 2022, **38% of families who utilised a LDC service accessed it locally, within their home SA2.**<sup>1</sup> In **non-metropolitan areas**, this is **significantly higher**, at 57% - reflective of the larger SA2s and longer distances between services.
- Aggregated to the larger Statistical Area 3s, 82% of South Australian families living in non-metropolitan areas use a service within their local SA3, while this is the case for 63% of families living in Adelaide.<sup>2</sup>
- Chart 20 shows the flows of children between metropolitan SA3s for LDC in FY2022. There is a **high degree of movement**, predominantly between **neighbouring regions** (see Chart 20). Children from all parts of the city access LDC in Adelaide city, indicating parental **place of work** is also a key driver of mobility patterns.
- West Torrens, Adelaide City, Norwood-Payneham-St Peters and Holdfast Bay are all 'destination' locations for LDC, with significantly more children inbound to attend LDC than outbound. Conversely, Marion, Charles Sturt, and Onkaparinga have net outflows of children accessing LDC in other regions.

## Most LDCs responding to the sector survey indicated they use each and every one of their approved places

- Across the non-government LDCs, there are 35,000 approved places.<sup>3</sup> From the sector survey, 16% of LDCs choose to offer **fewer than their licensed (approved) places.**<sup>4</sup>
- On average, the LDCs which restrict places offer **89% (median) of their approved places.**<sup>5</sup> In total, 595 approved places were not offered across the 50 LDCs that reported restricting their places.<sup>6</sup>
- Services most commonly reported restricting their places to enhance **program quality** or provide **more space** for attending children.<sup>7</sup> Additional free text comments indicated services otherwise limited their places to maximise the **efficiency of the staff:child ratio**, due to places being reserved for **other activities** (such as playgroup), or to allow **transitions** between rooms.

Chart 20: Movements from home SA3 to LDC service SA3, for metropolitan children in FY22



**How to interpret this chart:** this diagram shows the flows of children from their home SA3 to the SA3 of their ECEC service, where both are metropolitan, and at least 25 children are moving between areas.

- The outer ring segments illustrate the total children by home SA3, from most to least (clockwise)
- The width of the lines represent the volume of children travelling between SA3s, identified by colour. Shades of the same colour are for regions within the same Statistical Area 4 (SA4) (North, South, Central & Hills, and West).
- Where the width decreases from one SA3 to another, there is a net flow. For example, from Onkaparinga to Marion. Where the width is consistent, flows are equivalent bidirectionally (E.g. Charles Sturt to Port Adelaide - West).
- Children attending LDC within their home SA3 are represented by the same-colour arcs. The narrower the arc relative to all children in the SA3, the lower the share of children attending within their home SA3.

## Section 4

# Connections to the community

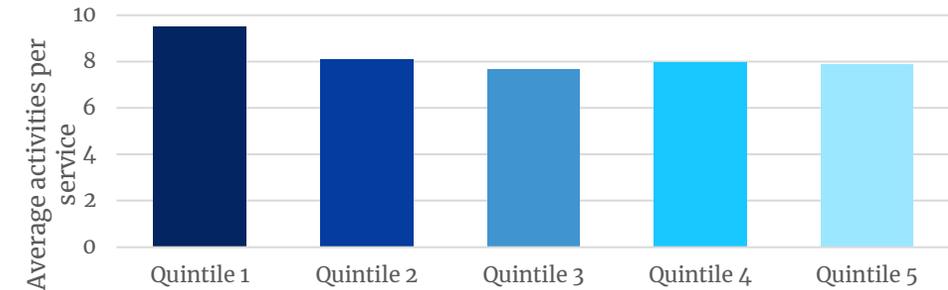
LDC supports a high volume of activities for children and their families.

The sector both directly offers additional activities on site and facilitates third parties to deliver activities on site – acting as hubs for families and children

- Over 95% of survey respondents reported they either directly offer additional activities to support the children and families that attend, or support children and families to access additional activities on their sites.<sup>1</sup> The range of activities were broad, and several services indicated they offered other activities such as dental checks, dance classes, incursions and excursions.
- On average services supported families to access 8.4 additional kinds of activities, either directly or through a third party. These activities were diverse, encompassing health and development activities for children and broader community activities, including working directly with families.<sup>2</sup>
- All types of service providers offer and facilitate additional activities, to varying degrees, including private for profit and not-for-profit services, which provide overall access to activities at similar rates.
- For profit providers reported facilitating access on their sites slightly more than not-for-profit providers (28% compared to 23%), and a slightly higher proportion of not-for-profit providers reported offering activities directly (17% compared to 14%).<sup>3</sup>
- Services were more likely to support families to access health and development activities on site, for instance speech pathology, occupational therapy, child development checks and other allied health services – acting as a kind of hub where children and families can access specialist services.<sup>4</sup> Community, carer and family focussed activities were more commonly directly offered by services, for instance, community events, book lending programs or foodbanks.
- Metropolitan and non-metropolitan services offered similar numbers of average activities, but were also more likely to offer certain activities – for instance metropolitan services were more likely to offer a book lending program.<sup>5</sup>

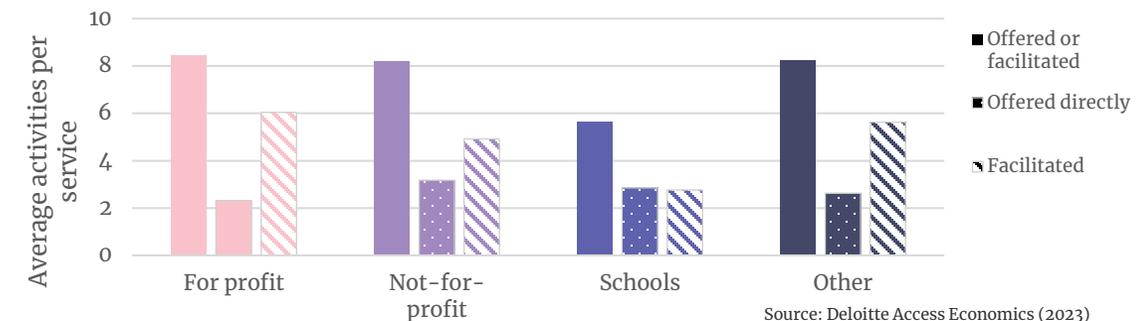
\*SEIFA quintiles were derived from the deciles provided by ACECQA, where available. 27 services did not have a SEIFA decile. For these services, and those not assessed by ACECQA, SEIFA information was sourced from the Australian Bureau of Statistics for the SA2 area of the service. 2 services did not have a SEIFA score available through the Australian Bureau of Statistics (including the Adelaide Airport SA2).

Chart 21: Average activities by SEIFA Quintile\*



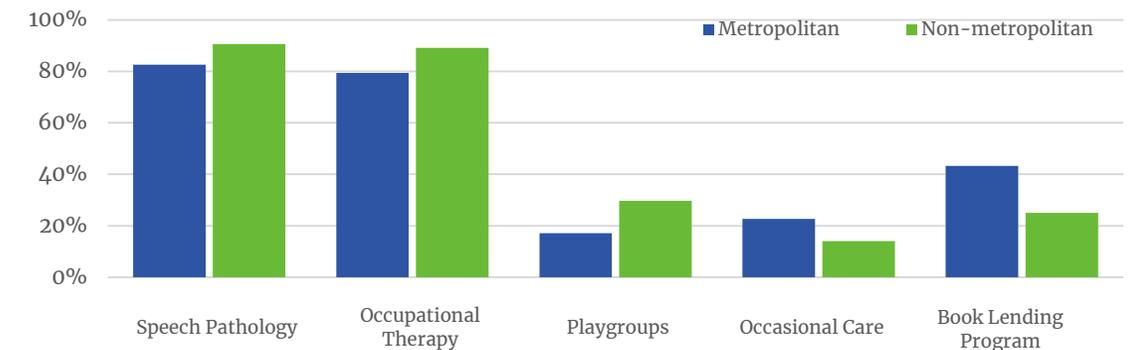
Source: Deloitte Access Economics (2023)

Chart 22: Average activities by provider type



Source: Deloitte Access Economics (2023)

Chart 23: Largest differences in activity provision by metropolitan status



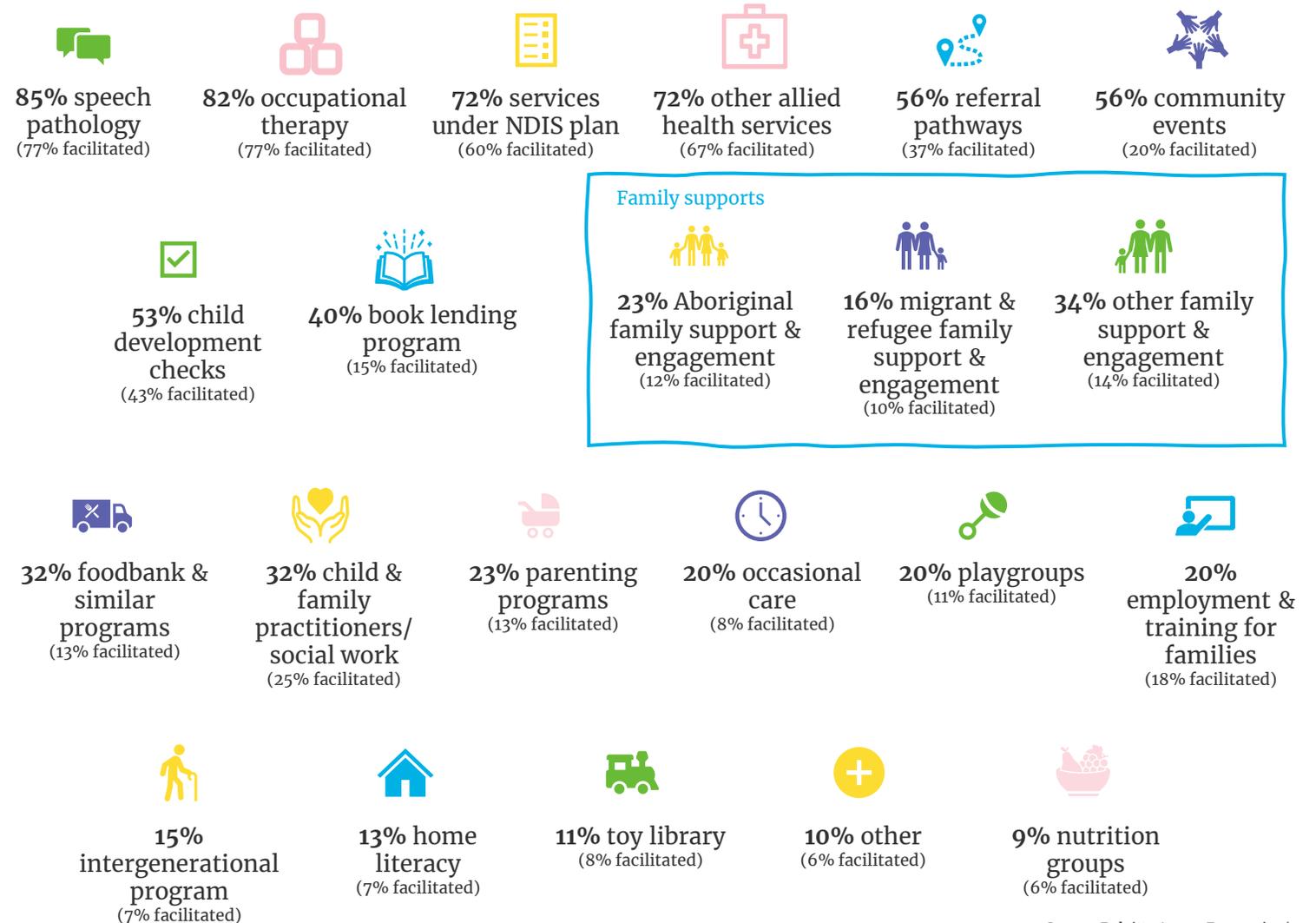
Source: Deloitte Access Economics (2023)

The other activities that LDCs provide are many and varied, spanning health and development activities for children and broader community activities, including working directly with families.

## LDCs have capacity and potential to offer much more than what is considered their core offering of education and care

- Some of these activities are offered directly by services, and some are facilitated by other services on site, so that families and children can access them through a third party provider.
- The most common activities are those that can be more readily facilitated on site, like speech pathology, occupational therapy and other services under the National Disability Insurance Scheme (NDIS) (see Figure 2). LDCs report acting as enablers for these health and development services for families, not only providing venues, but providing a convenient way for families and allied health workers to schedule appointments.
- However, there remained a diverse offering of activities directly offered or provided by services, which can be more commonly associated with specific aspects of the communities in which services operate.
- In terms of universal need, child development checks are less likely to be offered than other health services. Child and Family Health Service (CaFHS) offers face-to-face preschool health checks at some kindergartens and preschool centres, and two pilot programs were launched in 2022 to expand child development screenings through Goodstart Early Learning and Playgroup SA.<sup>1</sup> There remains potential to reach more children by offering these checks through the State's long day care centres.
- Services offer a range of opportunities to support families as well as directly offering activities for children, with 1 in 3 LDCs offering foodbank or similar programs, and several offering playgroups, parenting programs, and occasional care.<sup>2</sup>
- A small number of services indicated that the pandemic had had a negative impact on the other activities they were able to offer – and that the impact is ongoing.<sup>3</sup>

Figure 2: Additional activities which services provided directly or supported families to access



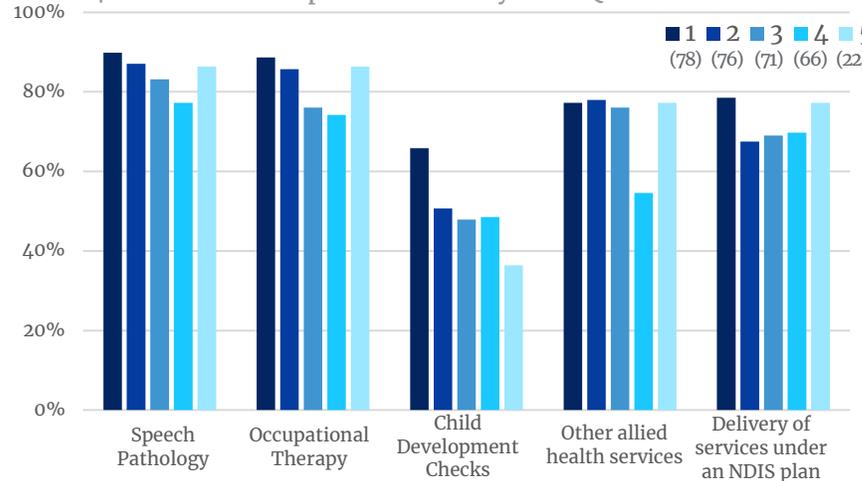
Services respond to the needs of communities in the activities they offer, with a different profile of activities occurring according to socioeconomic advantage and provider type

**Health and child development activities are more commonly offered than other activities, with other activities more responsive to specific community needs and contexts**

- Services in areas of higher disadvantage reported that they offer or support more activities, including in particular categories such as **child development checks**, but also **foodbanks**, and **social work**, relative to more advantaged communities<sup>1</sup> (see Chart 24 for child development checks, and page 18).
- For some kinds of activities, services in the middle quintiles of SEIFA offered fewer additional activities, on average. For example, activities such as occupational therapy and services under an NDIS plan were offered at similar rates in the highest and lowest SEIFA quintiles, but at lower rates in the intermediate quintiles.
- These services in the middle SEIFA quintiles were less likely to report having specific activities to engage or support families in general.
- However, areas of lower disadvantage reported much lower rates of offering activities to support refugee and migrant and Aboriginal families both compared to areas of higher disadvantage, and compared to their self-reported rates of offering activities to support other families.
- Certain kinds of providers were more likely to offer a given activity. For example, **community not-for-profit services** supported **playgroups** more commonly, and **private for profit services** were more likely to report offering **occasional care**.

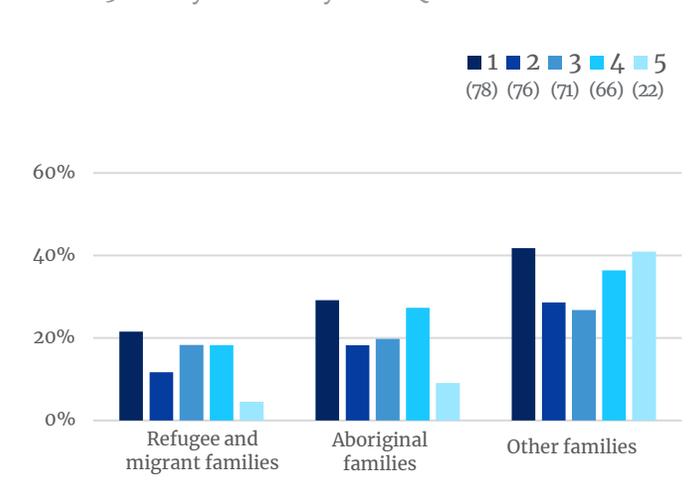
Note: sample sizes for each category are reported under the legend

Chart 24: Health and development activities by SEIFA Quintile



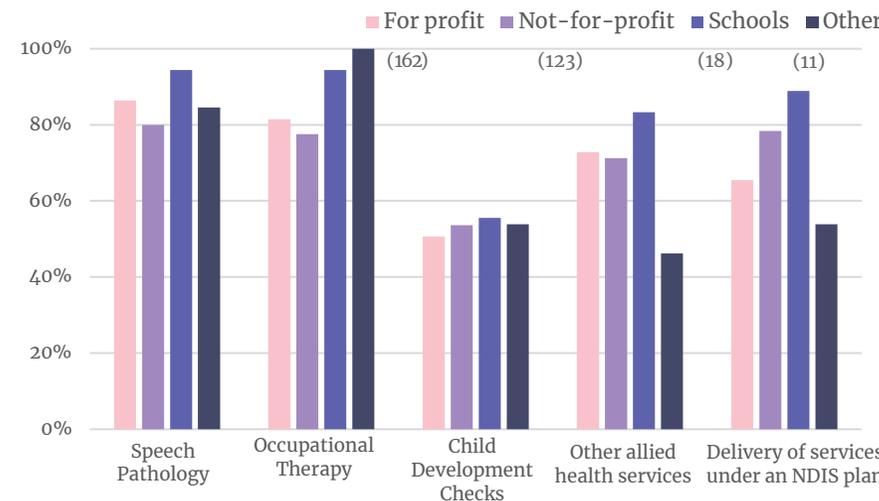
Source: Deloitte Access Economics (2023)

Chart 25: Family activities by SEIFA Quintile



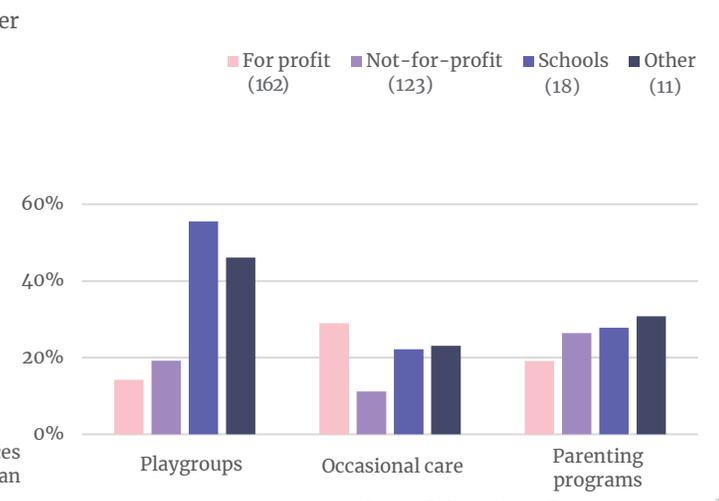
Source: Deloitte Access Economics (2023)

Chart 26: Health and development activities by provider type



Source: Deloitte Access Economics (2023)

Chart 27: Parenting supports and care by provider type



Source: Deloitte Access Economics (2023)

## Section 5

# Workforce and quality

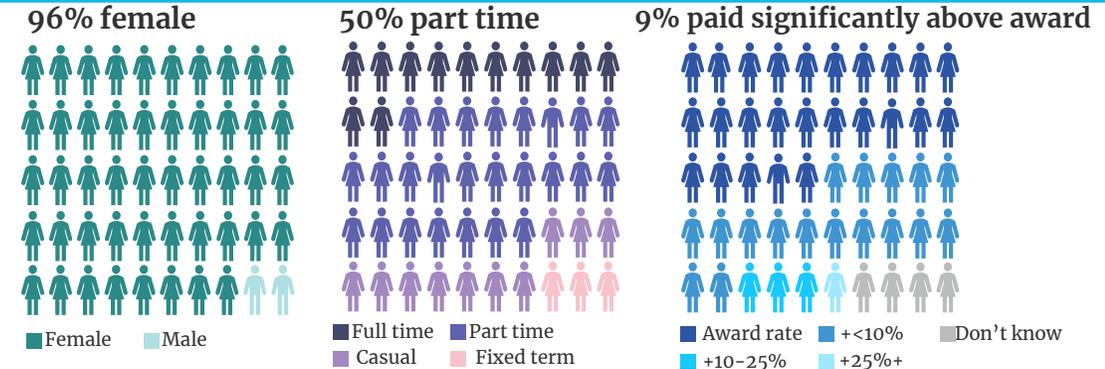
The LDC sector employs over 8,000 South Australians who are predominantly female, working part time, and vocationally qualified.

## Workforce

From the April/May 2021 National Workforce Census, the workforce across 376 LDCs had the following characteristics:



\* Note: total counts of LDC services vary from current total due to timing of data collection and sector entries and exits

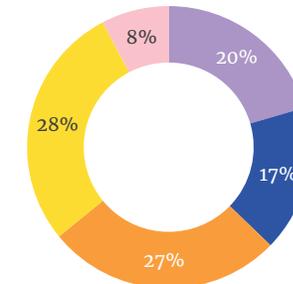


Source: Deloitte Access Economics, ACECQA (2023); Department of Education (2023)<sup>1</sup>

### There is turnover within LDC services, but most sites have at least one employee there for over five years

- The workforce of the LDC sector is split into **assistants (56%), early childhood teachers (8%), group leaders (19%), principals (7%), other contact staff (2%)** and non-contact staff (8%).<sup>1</sup>
- Half of the workforce is employed on a permanent part time basis, as reported in both the National Workforce Census and the sector survey, with approximately 20% of the workforce being casual. Permanent part time workers had a median of 28 hours per week, while casual employees worked an average of 16 hours per week.
- Half (49%) of LDC workers are paid at the award rate commensurate with their employment. Just over one-third are paid up to 10% above the award rate, while 9% are paid more than 10% above award rates.\*<sup>2</sup> (See [more](#))
- By qualification, **44%** of ECEC workers are **diploma** qualified, **13%** have a Bachelor's qualification or higher, and **29%** have a certificate III or certificate IV. **11%** of LDC workers have no relevant qualification, with these individuals working primarily as non-contact workers or aides. 43% of these individuals were studying for an ECEC qualification.<sup>3</sup>
- Most services have at least one staff member with significant ECEC experience – 99% of services having at least one staff member with 5 years of experience, 95% with someone with 10 years, 91% with someone with 15+ years, and 77% with someone with 20+ years of ECEC experience.<sup>4</sup>
- Across LDCs, the **average tenure** is approximately **4.5 years**.<sup>5</sup> **84%** of services had a staff member with at least 5 years of tenure at the service, though conversely 16% did not. Notably, most (93%) services without someone of at least 5 years tenure had opened after 2016, according to ACECQA records. In the sector survey, 82% of respondents reported having at least one staff member with 5 or more years at the service.<sup>6</sup> Conversely, 24% of all ECEC staff reported in the sector survey were new to the service within the last 12 months.<sup>7</sup>
- 20%** of **centre directors** were **new to their role** (<12 months) and 55% had worked there for less than three years.<sup>8</sup>

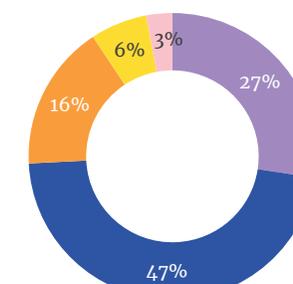
Chart 28: LDCs by the share of their workforce with tenure of 5 years or more at the site



Services reporting a share of their workforce:



Chart 29: LDCs by the share of their workforce new to the service within the year



Services reporting a share of their workforce:

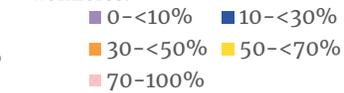
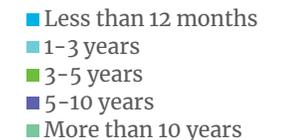
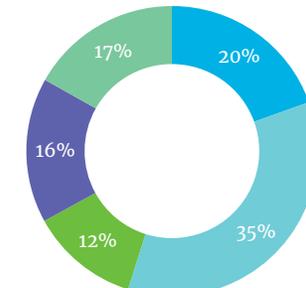


Chart 30: LDCs by centre director tenure



Source: Deloitte Access Economics, Department of Education (2023)<sup>1</sup>

\* Services did not know how their staff were paid relative to award rates for 9% of LDC staff.

Early childhood teachers and director equivalents are more likely to be paid significantly above award rates (10%+), while staff in private for profit services and in non-metropolitan settings are more likely to be paid at the award rate.

Staff payments relative to the award differ by the main role of the staff member, the provider type of the service, and the service's location, as reported in the National Workforce Census of 2021

- By staff role, educators working as assistants were the most likely to be paid at the award rate. Conversely, educational leaders had the highest likelihood of being paid more than 25% above the award.<sup>1</sup>
- Private for profit long day care services pay most staff (74%) at the award rate. 4% of staff at these sites are paid significantly (10%+) above the award. Staff at not-for-profit long day cares are most commonly paid slightly above the award (60%).<sup>2</sup>
- Far fewer staff are employed by schools or other service types, as reported in the National Workforce Census, but these staff members are more commonly paid between 10-25% above the award than other LDC workers.
- Staff at non-metropolitan services are less likely to be paid above the award rate, with two-thirds of staff paid at the award rate, and only 4% paid significantly above the award.<sup>3</sup>

## 9% paid significantly above award

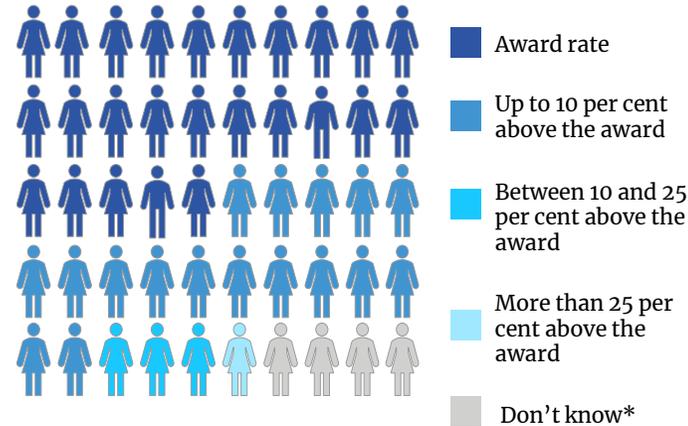


Chart 31: Payment relative to the award, by staff main role

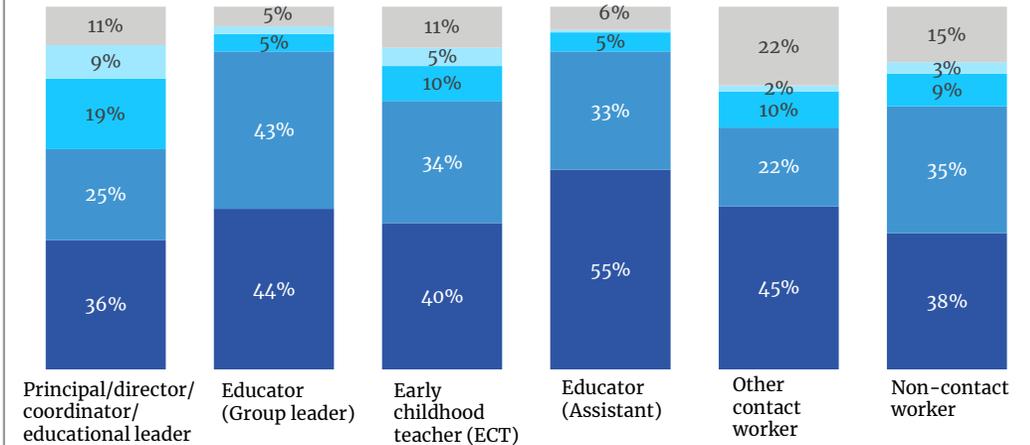


Chart 32: Payment relative to the award, by service provider type

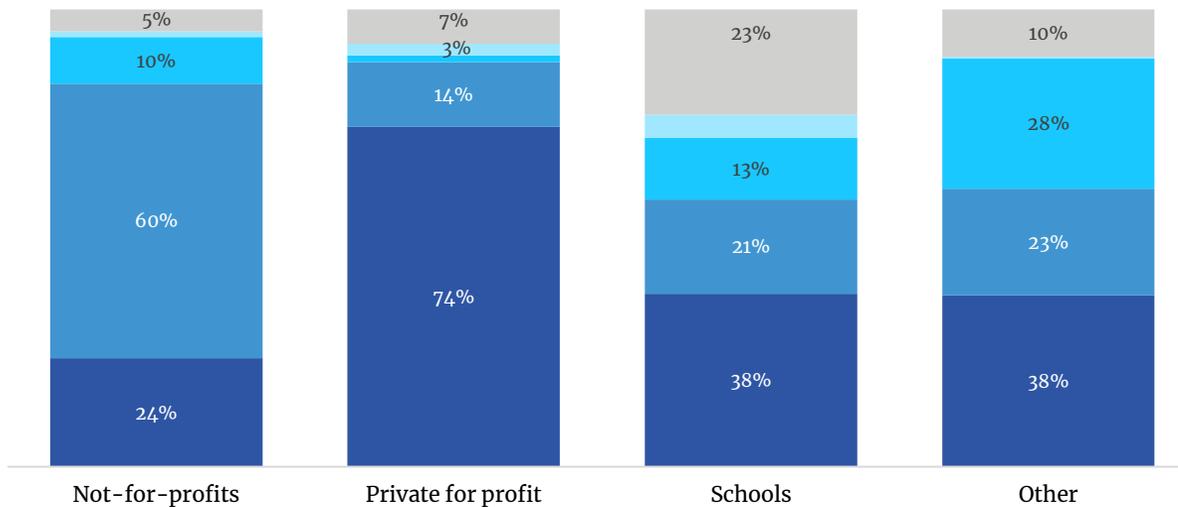
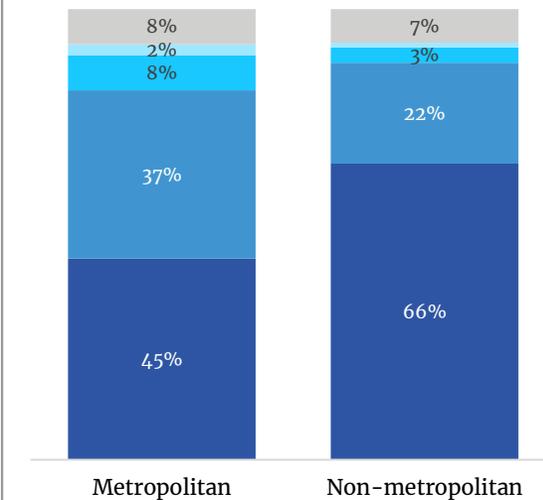


Chart 33: Payment relative to the award, by service location



Source: Deloitte Access Economics, Department for Education (2023)<sup>1</sup>; ACECQA (2023)

\* Note: 53 not applicable values have been excluded (0.006% of staff).

The relationship between workforce and quality in the provision of ECEC is well known, but there are challenges in understanding the existing landscape.

## The duration between quality assessments of ECEC services results in a lack of contemporary evidence to measure quality for many services

- Education Standards Board SA assesses LDCs against the National Quality Standard (NQS). These assessments are designed to measure and improve the quality of education and care in Australia. The NQS was introduced in 2012, and updated in 2018.
- As at Q4 2022, 32% of LDCs were assessed as **exceeding** the NQS (145 services), 46% as **meeting** the NQS (207 services), and 15% as **working towards** the NQS (74 services). No LDCs were assessed as requiring significant improvement, and 1 service achieved an 'Excellent' ranking.<sup>1</sup>
- However, these assessments were conducted over a 10 year period, resulting in significant variance around reliability and currency. On average, **LDCs in South Australia were assessed against the NQS five years ago**, and some have not been assessed since 2012.<sup>2</sup> **Around half** of all LDCs have been most recently assessed against the **2012 version** of the NQS, not the updated standards implemented in 2018.<sup>3</sup>
- When comparing data from the survey about Centre Director tenure with the service's most recent NQS assessment, 45% were assessed before the current Centre Director commenced.<sup>4</sup> For a small number of services which were assessed on the NQS more than 5 years ago, over 75% of the workforce is likely to have changed since the service's NQS assessment (33 services).<sup>5</sup>

## Workforce quality, experience, and tenure affect relationships with participating children and families, driving ECEC quality and outcomes, but current workforce challenges mean a high degree of reliance on supplementary casual staff

- The National Quality Standard area 4 focuses on staffing arrangements, reflecting known links between the quality of children's experiences at ECEC and the educators and teachers who provide care and education. Element 4.1.2. 'Continuity of staff' is a measure that 'every effort is made for children to experience continuity of educators at the service'.
- Services reported through the survey that there are ongoing workforce challenges for the sector.<sup>6</sup> ACECQA reports that 18.5% of all SA LDCs have a **temporary staffing waiver**, compared to 16.4% nationally.<sup>7</sup> Nearly **half** of long day care centres surveyed use temporary and casual workers employed through a **recruitment agency (48%)**, and around 10% said that they use casual and temporary staff **weekly**.<sup>8</sup> Large providers were more likely to report using temporary and casual workers than small or standalone providers. **Private for profit providers used temporary and casual staff at greater frequencies** than not-for-profit providers.<sup>9</sup>
- However, half of those that use recruitment agency staff estimated that the average proportion of casual and temporary workers from a recruitment agency would be less than 10% of their overall workforce. This was similar for both for profit and not-for-profit provider types.<sup>10</sup>
- Noting that NQS assessments are not reliably current, services assessed as **'working towards NQS'** were **more likely to report using temporary and casual staff** than services with an 'exceeding NQS' rating, and more likely to report using them often or very often (Chart 36).<sup>11</sup>

Note: sample sizes for each category are reported in brackets

Chart 34: NQS assessments of LDCs across SA by SEIFA Quintile

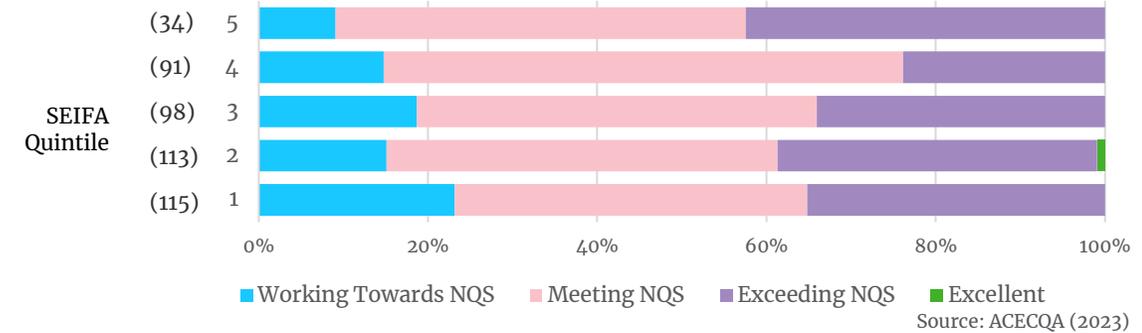


Chart 35: Frequency of temporary and casual workers by provider type

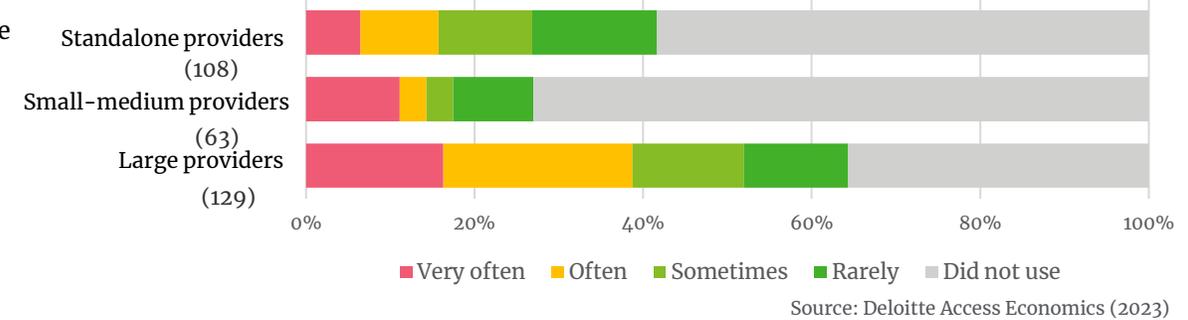
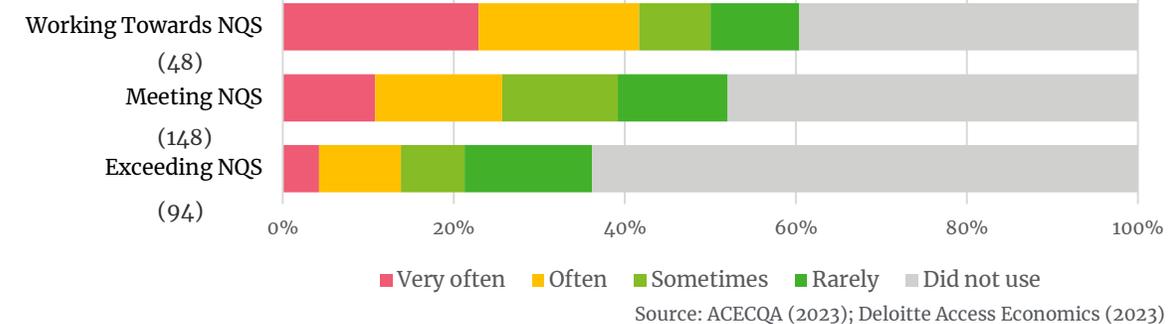


Chart 36 Use of recruitment and agency staff in 2022 by NQS Assessment



## **Section 6**

# Fees and affordability

The costs of ECEC can be significant for families. Average total fees at LDCs are \$11.25 per child per hour. After subsidies, annual out-of-pocket costs average 4.5% as a proportion of gross family income.

## Hourly fees varying as a function of service characteristics

- From CCSS data, across the LDC sector, average **fees per hour** were **\$11.25** for South Australian families.<sup>1</sup> These fees vary slightly by the characteristics of the service providing ECEC – **fees are higher in advantaged areas** in SEIFA quintile 5, and highest at schools by provider type, driven by independent schools.
- Metropolitan** fees are typically **higher** than those in non-metropolitan South Australia (\$11.37 to \$10.80 per hour) with **minimal difference** in the fees charged by LDCs considering the **age of children** attending, when considered across all LDCs.<sup>2</sup>

## As a proportion of gross household income, out-of-pocket expenses for LDC are highest for children in more advantaged areas

- For families, the **affordability** of LDC is driven by a combination of the **fees** at the services their children attend, the **hours** they use, the **Child Care Subsidy** they are entitled to, and their **family income**.
- An **affordability index** has been created, which compares weekly out-of-pocket (OOP) expenses for a child to enrol for a standardised number of hours,<sup>^</sup> to the mid-point of their parent or guardian's gross weekly income.<sup>#</sup> **A higher index** indicates that a larger component of the family income is spent on LDC, and LDC is relatively **less affordable**.
- For FY2022, the median **weekly out-of-pocket expense** as a proportion of weekly family income was **4.5%** across all children across all weeks of the year.\* Across the SEIFA quintiles, LDC is relatively more affordable for children in low SEIFA areas. This result is driven by lower average fees charged per hour in these areas, and the CCS covering a larger share of charged fees.
- The above analysis assumes that all children use LDC for the same number of hours per week to isolate the price effects. However, there are also differences in hours charged across SEIFA quintiles, with children in high SEIFA areas using LDC for more hours on average per week. Consequently, this affordability index underestimates the degree of variability in actual charged fees across SEIFA quintiles.

<sup>^</sup> This analysis estimates out of pocket expenses *per child per hour* at the child level, and then assumes that all children are enrolled for 28 hours per week, which represents the mean weekly charged hours across children in FY22.

<sup>#</sup> Based on the available data, it is not possible to estimate parents' post-taxation income.

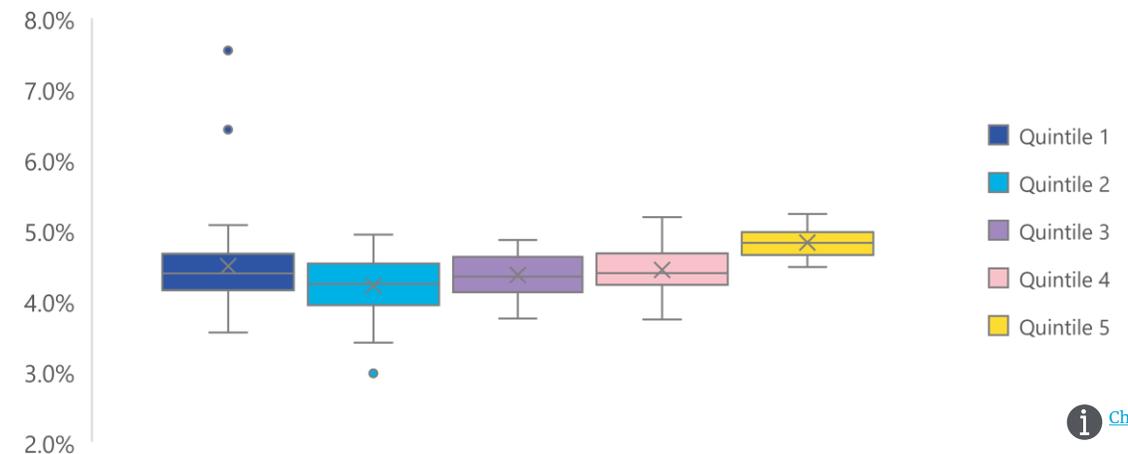
\* The analysis includes all families living in-scope SA2s. See chart notes for further detail.

Chart 37: Average LDC fees charged per child per hour, by service characteristic



Source: Deloitte Access Economics, Department of Education (2023)<sup>2</sup>, ACECQA

Chart 38: LDC affordability index, by SEIFA quintile



Note: the higher the value, the greater the share of a family's income and the less affordable.  
Source: Deloitte Access Economics, Department of Education (2023)<sup>2</sup>

There is some geographic variability in the affordability of LDC, considering the home residence of families, though most variation is observed in metropolitan SA2s in SEIFA quintile 1.

### Across South Australia, affordability is highest in non-metropolitan locations

- Considering the affordability index, comparing an estimation of standardised weekly out-of-pocket expenses per child, long day care is most affordable for families living in Tatiara, with the top 10 most affordable regions located in non-metropolitan South Australia.<sup>1</sup>
- Conversely, the regions of *lowest affordability* for long day care are for families living in Elizabeth, Smithfield – Elizabeth North, and Beaumont - Glen Osmond. 8 of the 10 least affordable regions for families are located in metropolitan South Australia.
- Figure 4 shows the most affordable and least affordable metropolitan SA2s in 2022. There are clear pockets of lower affordability in the north of the metropolitan area, around the Elizabeth region, and in the east of the city, around the Beaumont – Glen Osmond region. Conversely, there is a pocket of higher affordability in the Woodcroft region, though higher dispersal of the top 10 most affordable regions within the metropolitan region.

Figure 4: Map of 10 most affordable and 10 least affordable metropolitan SA2, 2022

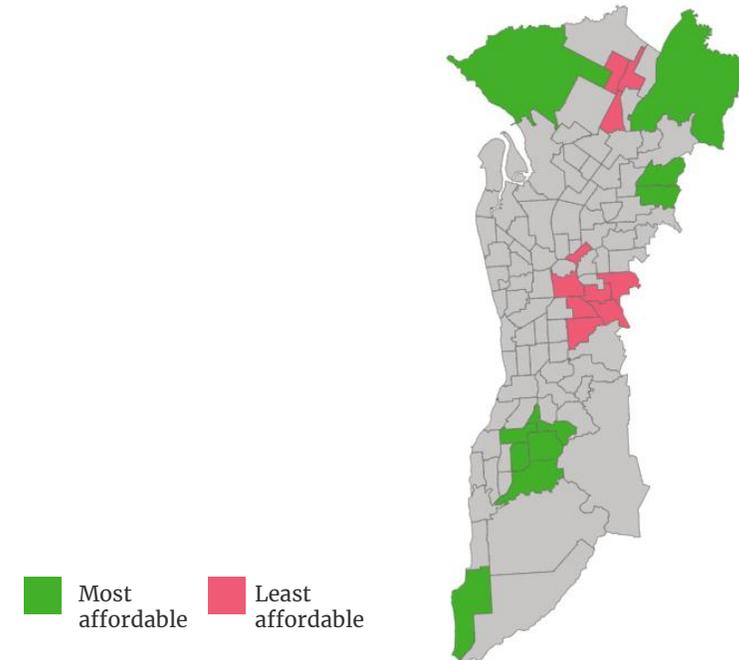


Table 3: Most affordable regions for LDC, by family residence

	Top 10 most affordable regions by family residence	Affordability index
1	Tatiara	2.97%
2	West Coast	3.41%
3	Jamestown	3.50%
4	Ceduna	3.50%
5	Wakefield - Barunga West	3.55%
6	The Coorong	3.59%
7	Adelaide Hills	3.73%
8	Roxby Downs	3.75%
9	Yankalilla	3.77%
10	Strathalbyn	3.79%

Table 4: Least affordable regions for LDC, by family residence

	Top 10 least affordable regions by family residence	Affordability index
1	Elizabeth	7.54%
2	Smithfield - Elizabeth North	6.42%
3	Beaumont - Glen Osmond	5.23%
4	Adelaide	5.18%
5	Walleroo	5.07%
6	Toorak Gardens	5.05%
7	Walkerville	4.99%
8	Burnside - Wattle Park	4.97%
9	Goolwa - Port Elliot	4.94%
10	Unley - Parkside	4.92%

## Section 7

Interest in offering three-year-old preschool

# Interest in offering three-year-old preschool

The majority of services surveyed expressed interest in providing three-year-old preschool, and services report many existing three-year-old places could be used to offer preschool.

## Long day care centres generally support the introduction of three-year-old preschool

- **81% of those surveyed indicated interest in offering three-year-old preschool** (63% 'very interested' and 18% 'interested').<sup>1</sup> (Figure 4) This was mostly a similar proportion by profit status (for profit, NFP, and school providers), with 'other' provider profit status services less interested (with 3 of 10 services 'not interested').
- Large providers more commonly reported interest in offering three-year-old preschool (Chart 39).

## There is capacity to offer three-year-old preschool through resourcing existing programs and converting non-government preschool equivalent programs

- **Almost half (45%) of services indicated that the three-year-old children at their service already participate** in a program that meets the current definition of preschool in South Australia.<sup>2</sup>
- A smaller proportion of large providers reported offering an equivalent preschool program for their three-year-old cohorts, but a larger proportion reported the potential to convert their existing program. This means that **across provider sizes, a similar proportion of services could offer three-year-old preschool.**<sup>3</sup>
- Across all provider sizes and types, a **small number of services indicated that they would not be able to convert their existing three-year-old program into preschool** (6%).<sup>4</sup>

## Existing four-year-old preschool provision commonly intersects with the non-government sector in South Australia

- Approximately **half of four-year-old children attending LDCs also attend preschool at a government preschool site**, according to the survey.<sup>5</sup>
- 39% of services that did not seek funding to provide four-year-old preschool under the *Preschool Reform Agreement* indicated that there are insufficient four-year-old children in their preschool program because of proximity and access to a government preschool.<sup>6</sup>

Services indicated that several factors would influence their willingness and ability to offer three-year-old preschool, including:<sup>7</sup>

- Funding considerations, including financial viability and available resources
- Available places, space and demand
- Workforce availability and supply, including considerations of professional development for their existing workforce

Figure 4: Interest in offering a three year old preschool program

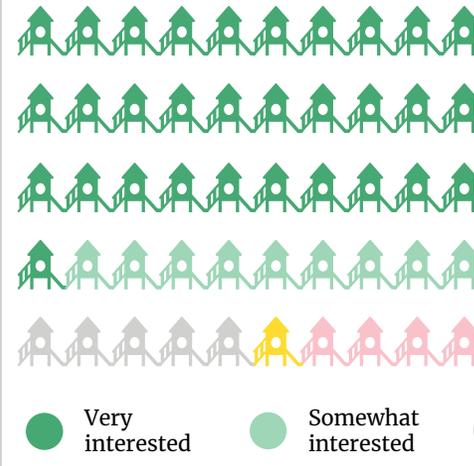


Chart 39: Interest in offering a three year old preschool program by provider size

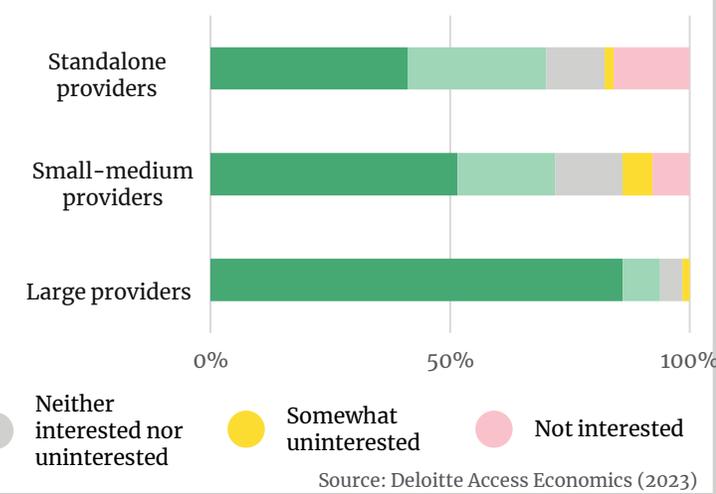
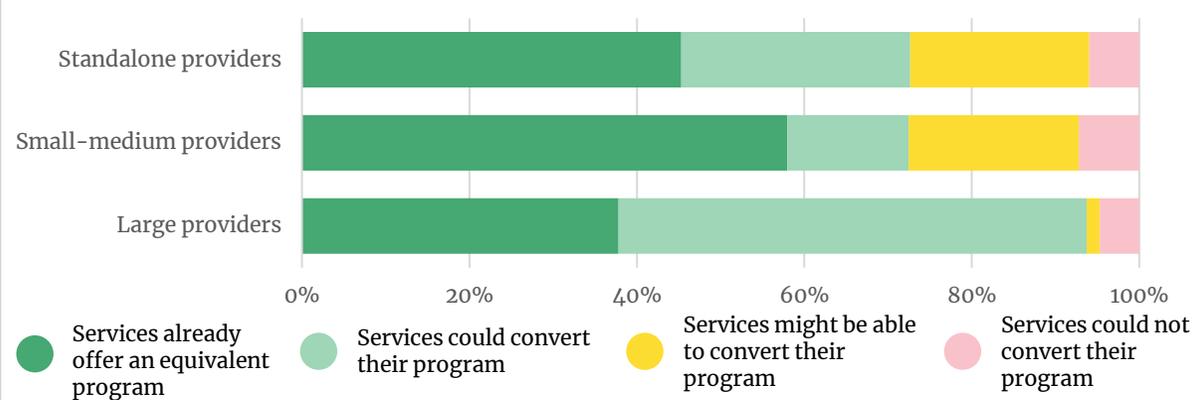


Chart 40: Preschool program potential provision by provider size

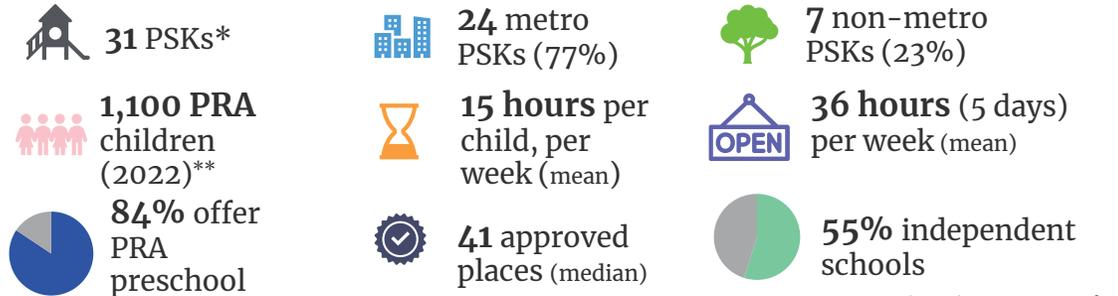


## Section 8

Non-government preschool and other services

There are 32 non-government preschools in South Australia, typically operated by independent schools or the Catholic education sector, that provide additional system capacity.

## Non-government preschool



\* PSK refers to a preschool/kindergarten, as classified in ACECQA. These services do not offer LDC.  
\*\* Total enrolment data is not available for preschools. Approximately 1,100 children at 26 sites are PRA funded.

Source: ACECQA (2023); Department for Education, SA (2023); Department of Education (2023)<sup>1,2</sup>

### Non-government preschools are commonly offered in conjunction with schools

- The largest share of dedicated preschools are operated by **independent schools** (55%, 17 services), followed by **Catholic schools** (26%, 8 services).<sup>1</sup> The remaining six services are four not-for-profit and two for profit services.
- In addition to the 25 standalone non-government preschools delivered by school services, there are **34 LDCs** offered at independent schools, mostly based in Adelaide. 27 of these are identified as **early learning centres**, or ELCs, run through independent schools.<sup>2</sup>
- Independent school providers typically manage one site, and **74% of dedicated preschools** are managed by **small providers** with one or two services.<sup>3</sup>

### Most, but not all, specifically deliver a PRA-funded preschool

- The South Australian Government funded **26 of the 31 preschools (84%)** to deliver preschool through the Preschool Reform Agreement.<sup>4</sup> Two of the five services that are not PRA-preschool sites are independent school sites, while others only offer programs for children younger than four years, who are ineligible for preschool delivery.
- From survey data, only a minority of preschool services had three-year-olds (32%).<sup>5</sup> Those that did typically indicated their **three-year-old attendees** were in a preschool-equivalent program (83%).
- 89%** of preschools responding to the survey selected the lowest band available considering the share of their four-year-old attendees who also attended a government preschool site, indicating there is minimal overlap between dedicated non-government preschools and the government preschool sector.<sup>6</sup>

### Other ECEC services

There are **31 other services** which offer centre-based ECEC, but are not distinctly classified as LDC or PSK sites in national registers. These include some of the South Australian Government **rural care services**, **children's centres** and **children's services centres**, which offer extended programming beyond that of preschool, and specific **Aboriginal preschool** and **affiliate programs**.<sup>7</sup>

22 of the services are associated with government standalone or school-based preschool facilities, while 9 of these services are distinct.<sup>8</sup> These 31 other facilities are predominantly located in South Australia's regions (see Figure 5). Each service is associated with funding provided through the CCS. Collectively, they have **1,074 approved places**.<sup>9</sup> While data is not available for all sites, the 16 services with data had an average of **12 hours** per child per week, more closely resembling preschools than long day care activity.<sup>10</sup>

## Other ECEC

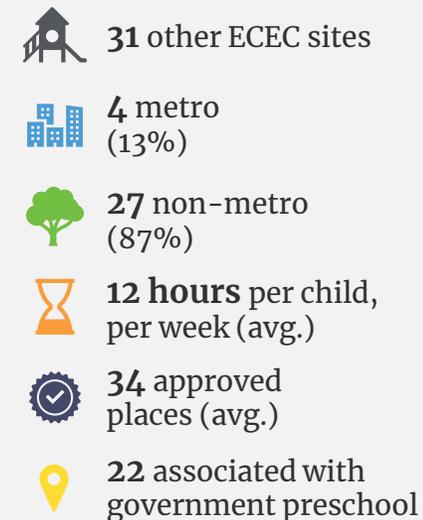
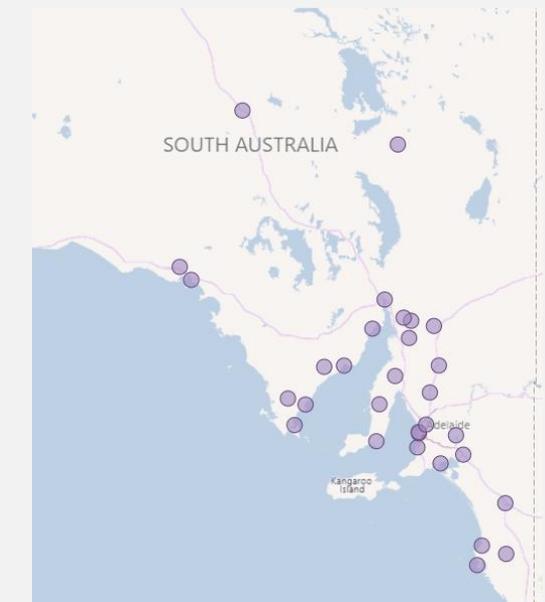


Figure 5: Map of other ECEC services, 2022



Source: Deloitte Access Economics, Department of Education (2023)<sup>2</sup>

Preschools and other ECEC services have some differences to the LDC sector, with lower average hours per week for children, a more experienced workforce (on average), and a higher likelihood of being co-located with another service.

## Non-government preschool

 31 PSKs

 19 PSK survey respondents

### Sector survey results

- Compared to LDCs, PSKs were more commonly co-located. 79% of PSKs were co-located, 60% with schools.<sup>1</sup>
- 70% indicated that they offer a preschool equivalent program for the three-year-olds that attend their service.<sup>2</sup> 1 service indicated it would not be able to convert its existing three-year-old program to preschool.
- 79% indicated they would be interested in offering three-year-old preschool (63% very interested).<sup>3</sup>
- Only 4 preschools reported that they use temporary and casual workers (21%).<sup>4</sup>

Chart 41: Average additional activities and services by centre type

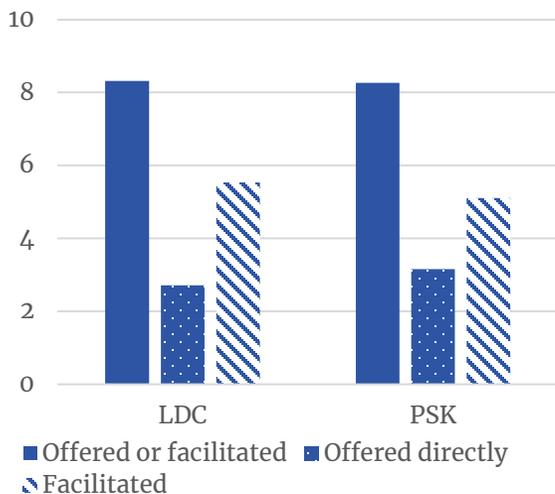
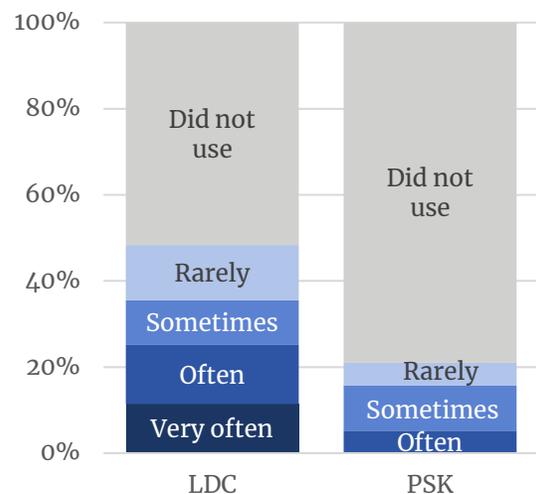


Chart 42: Frequency of temporary and casual workers by centre type



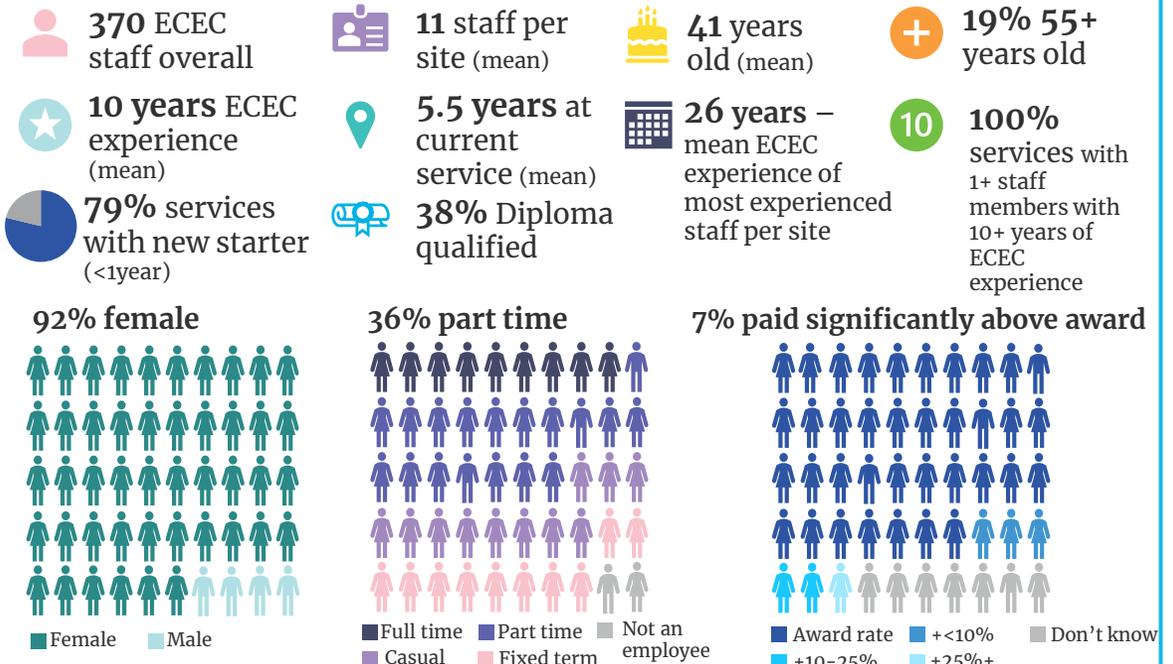
### Hours of use

- 3 preschools and 31 other services have data in the CCSS.
- At these services, families purchase an average of **19.9 hours** of education and care per child, per week.
- On average, children attend **15.2 hours** per week, or approximately **76%** of hours purchased.

Source: Deloitte Access Economics, Department of Education (2023)<sup>2</sup>

### Workforce

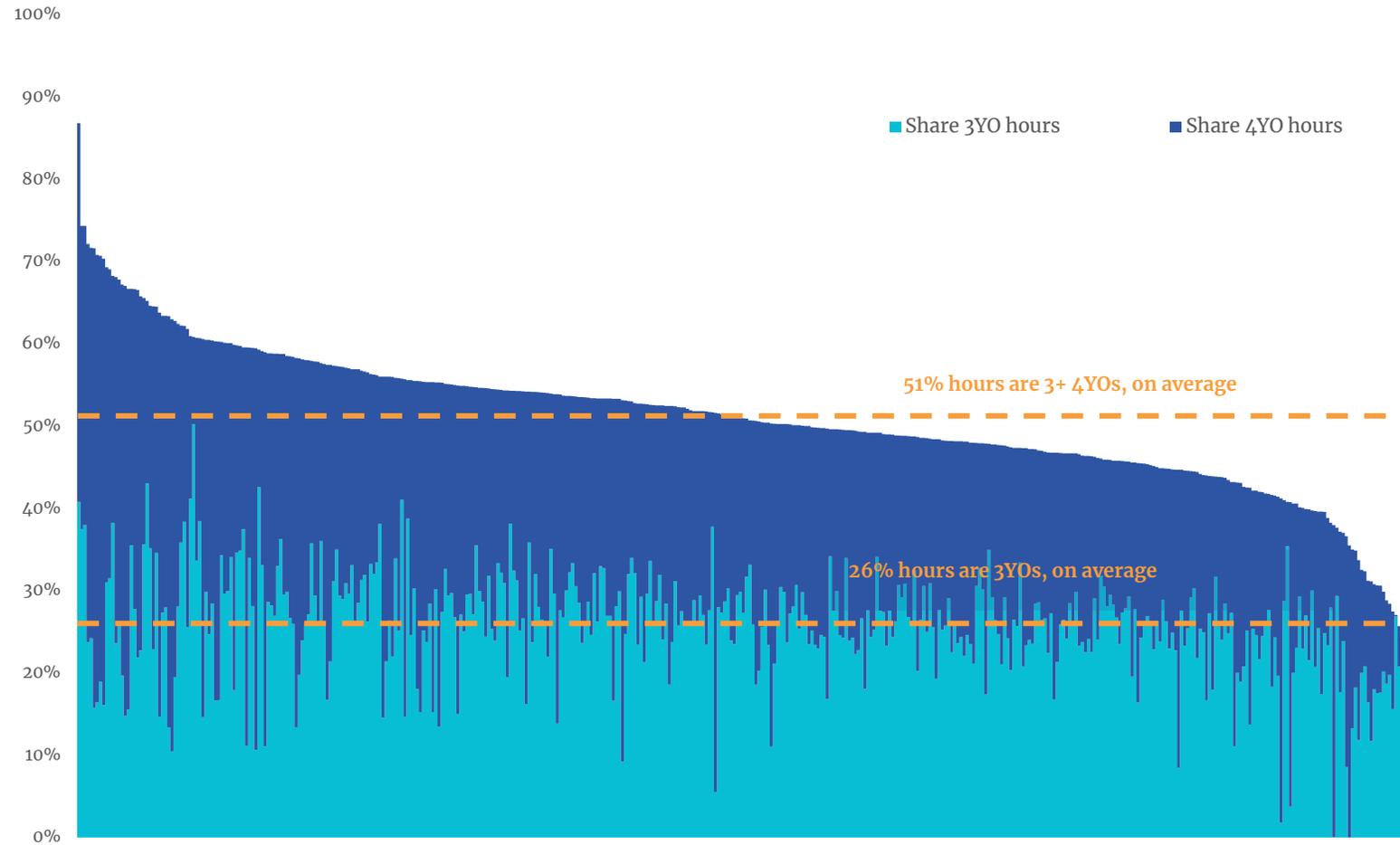
From the April/May 2021 National Workforce Census, the workforce across 33 PSK and other services had the following characteristics:



Source: Deloitte Access Economics, Department of Education (2023)<sup>1</sup>

# Appendix

Chart 2: Proportion of three and four-year-old charged hours, for each LDC, FY2022

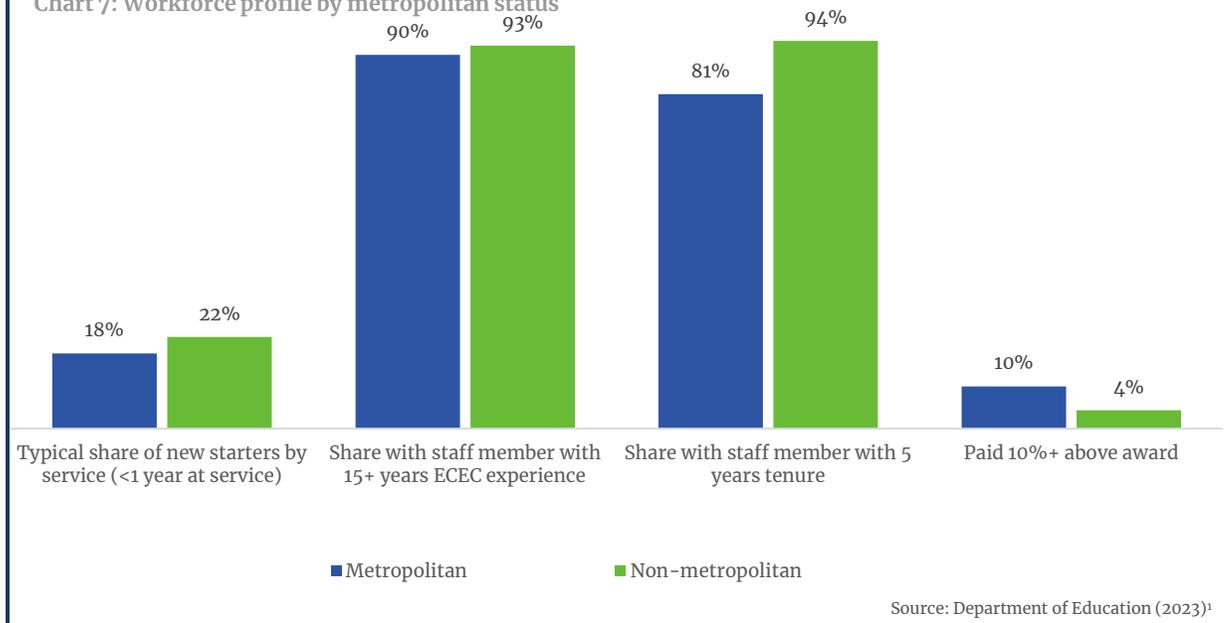


This chart depicts the concentration of hours charged at a service by the age of the children for whom the hours were booked, across LDCs in South Australia in FY22. It shows a column for each of the 431 long day care services with CCS hours data available. The total hours charged per service was summed by the age of the children at the service throughout financial year (1 July 2021 to 30 June 2022), with ages reported as at 30 June. The hours for three-year-olds and four-year-olds were calculated as a share of the total charged hours at the service. These resulting proportions are presented in a stacked column chart, ordered from the highest proportion of three and four-year-old hours, to the lowest proportion. The lighter teal column segments represent the share of three-year-old hours at the service. The darker blue column segments represent the share of four-year-old hours charged at the service. The mean percentage of three-year-old hours was calculated across all 431 LDCs, and determined to be 26% of hours. Across all sites, 51% of hours on average are charged for three and four-year-old children. These averages are represented with dotted lines.

Source: Deloitte Access Economics, Department of Education (2023)<sup>2</sup>

## Workforce profile

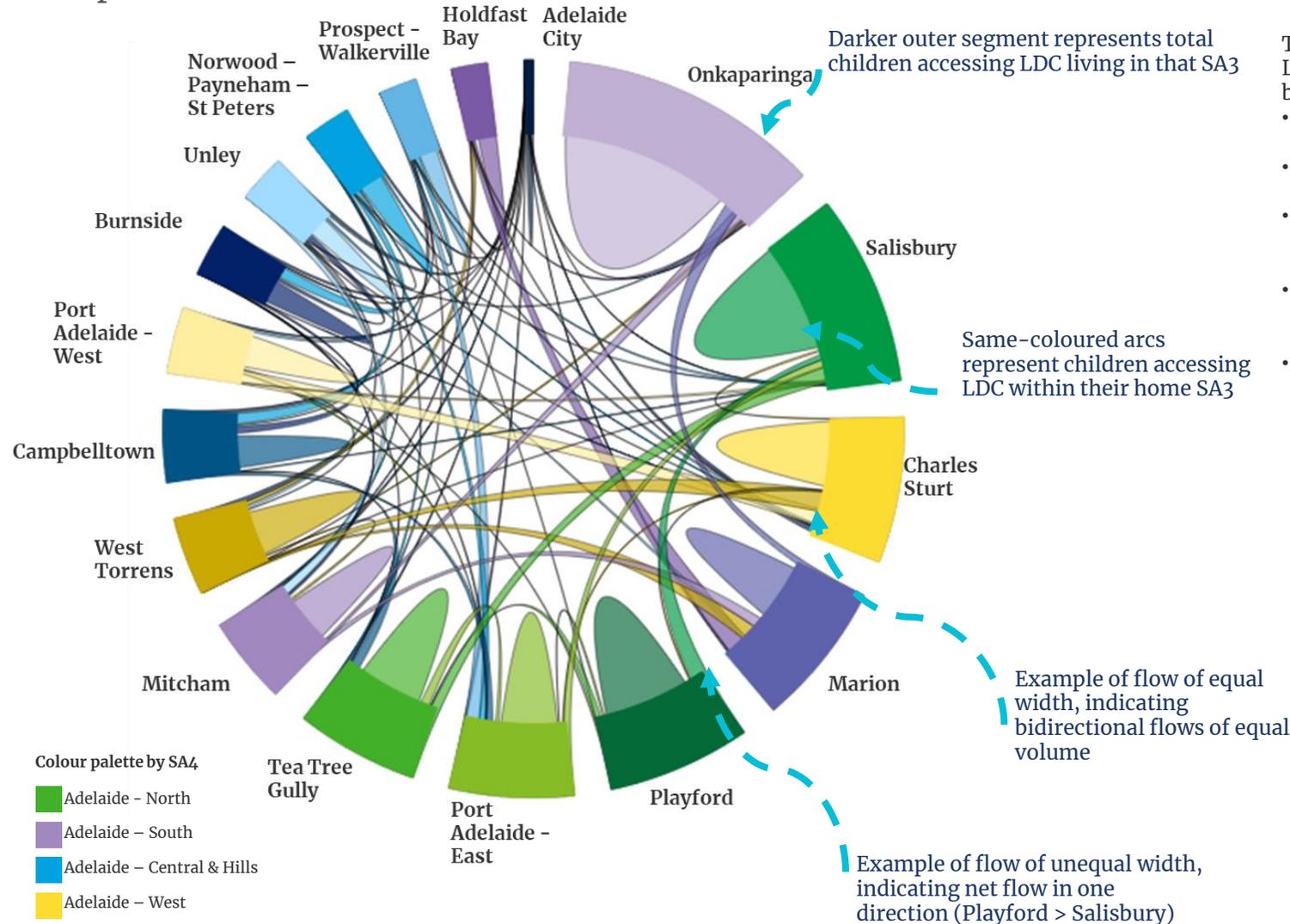
Chart 7: Workforce profile by metropolitan status



These workforce profile charts (repeated by metropolitan status, provider type, and provider size) compare key data points from the April/May 2021 National Workforce Census. These are:

- **Typical share of new starters by service (<1 year at service):** each long day care service with NWC data was summarised, including the total number of staff and the total number of staff with 0 years of experience with this service (i.e., new within 12 months of the NWC data collection). The share of new starters by site was calculated for each long day care service. These summary statistics present the *median share* of new starters across the long day care services within the given characteristic. For example, typically, 18% of staff in metropolitan LDCs are new to the service.
- **Share with staff member with 15+ years ECEC experience:** each long day care service with NWC data was assigned a flag of 0 or 1, based on whether any individual staff member employed had 15 years or more of early childhood education and care work experience. This captures the share of services by characteristic that had a staff member with this amount of experience.
- **Share with staff member with 5 years tenure:** each long day care service with NWC was assigned a flag of 0 or 1, based on whether any individual staff member employed had been employed at that service for 5 years or more. This statistic captures the proportion of services of that characteristic (e.g. non-metropolitan status) that had a staff member with at least 5 years at the service.
- **Paid 10%+ above award:** services in the NWC reported whether each individual staff member was paid at or above the award, or if they did not know. This statistic shows the proportion of all staff at services of a given characteristic that are paid either between 10% and 25% above the award, or more than 25% above the award. For example, of 1,635 staff at non-metropolitan LDCs, 73 were paid more than 10% above the award (4%).

Chart 20: Movements from home SA3 to LDC service SA3, for metropolitan children in FY22



Source: Deloitte Access Economics, CCSS (2023).

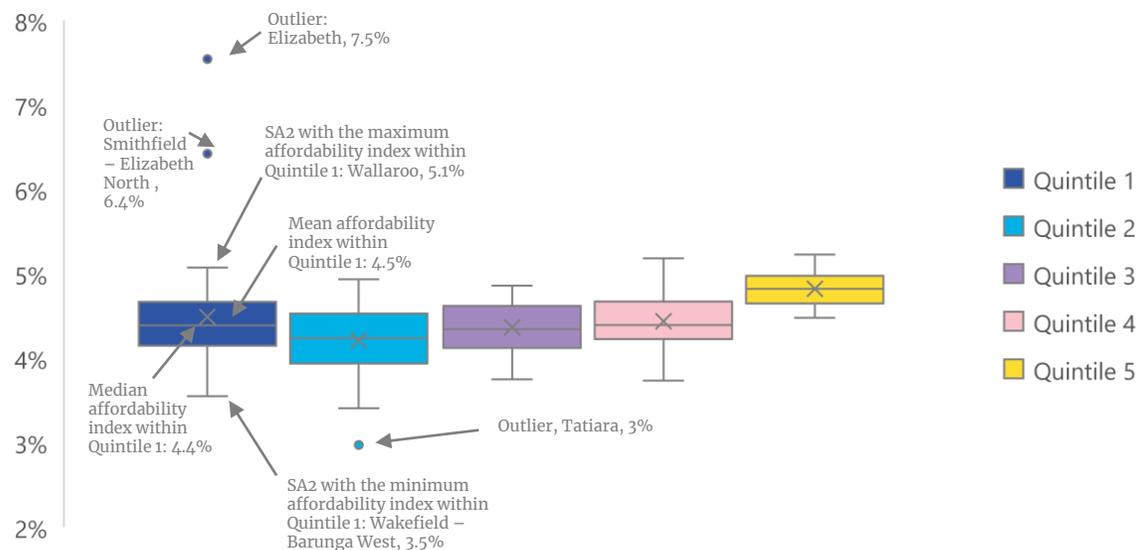
Source: Deloitte Access Economics, Department of Education (2023)<sup>2</sup>

This diagram shows the flows of children from their home SA3 to the SA3 of their LDC service, where both are metropolitan, and at least 25 children are moving between areas.

- The outer ring segments illustrate the total children by home SA3, from most to least (clockwise)
- The width of the lines represent the volume of children travelling between SA3s, identified by colour. The shades are grouped by Statistical Area 4.
- Where the width decreases from one SA3 to another, there is a net flow. For example, from Onkaparinga to Marion. Where the width is consistent, flows are equivalent bidirectionally (E.g. Charles Sturt to Port Adelaide West).
- Children attending ECEC within their home SA3 are represented by the same-colour arcs. The narrower the arc relative to all children in the SA3, the lower the share of children attending within their home SA3.
- Children may be represented more than once if they attend multiple services.

Top flows	Count of children
Marion to Holdfast Bay	807
Charles Sturt to West Torrens	796
Playford to Salisbury	665
Marion to West Torrens	626
Salisbury to Tea Tree Gully	606
Charles Sturt to Port Adelaide – West	597
Onkaparinga to Marion	547
Port Adelaide – East to Prospect - Walkerville	538
Port Adelaide – West to Charles Sturt	511
Onkaparinga to Mitcham	459

## Chart 38: LDC affordability index, by SEIFA quintile (FY22)



Note: the higher the value, the greater the share of a family’s income and the less affordable.  
Source: Deloitte Access Economics, Department of Education (2023)<sup>1</sup>

### SEIFA quintile sample sizes

SEIFA quintiles	Count of SA2s
Quintile 1	41
Quintile 2	46
Quintile 3	32
Quintile 4	26
Quintile 5	14

Note: The following eight South Australian SA2s were excluded from the analysis due to having fewer than 10 children (residing in those SA2s) who access LDC: APY Lands, Adelaide Airport, Lonsdale, Yorke Peninsula – South, Kimba – Cleve – Franklin Harbour, Le Hunte – Elliston, Outback, Kingston – Robe

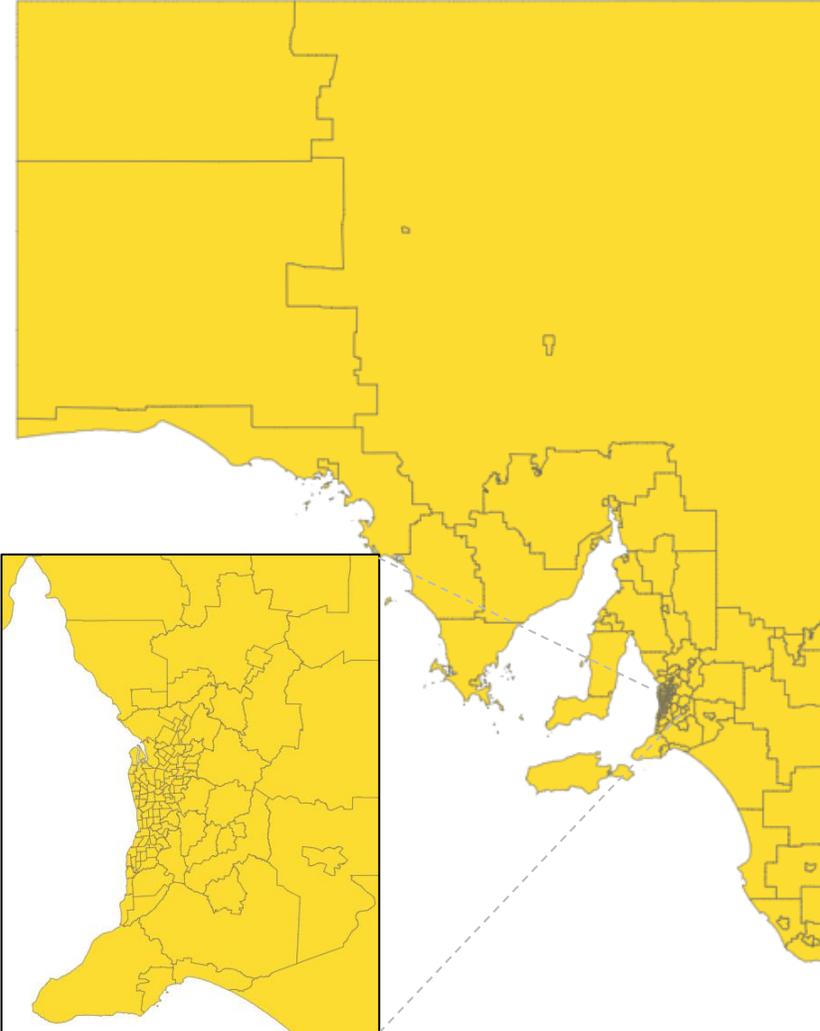
This chart shows the median affordability of LDC, based on the advantage of the area in which children reside.

- The affordability index is constructed by comparing the weekly out-of-pocket expenses associated with purchasing LDC for a standardised number of charged hours to the gross weekly income of the family, per child, in FY2022. Family income uses the mid-point of Australian Bureau of Statistics income bands, per child.<sup>^</sup>
  - To estimate weekly OOP expense per child, an estimate of OOP expense per hour (per child) was multiplied by a standardised number of hours per week (28 hours, mean weekly charged hours across children in FY22).
  - The weekly OOP expense per child was then compared to weekly gross family income to estimate a child level affordability index.
- These child level affordability indices are then aggregated to the SA2 level by taking the median weekly out-of-pocket expenses as a proportion of gross weekly family income across all weeks (FY22) and all children residing in each SA2.
- This creates an affordability index per SA2 which represents the median weekly out-of-pocket expense as a proportion of gross weekly family income per SA2.
- The SA2s are then categorised into SEIFA quintiles. The box and whisker chart visualises the affordability indices across SA2s by plotting each SA2 affordability index within its assigned SEIFA quintile.
- The box and whisker plot highlights key data points including SA2s with the maximum and minimum affordability indices within each SEIFA quintile as well as the median and mean affordability indices across SA2s within each SEIFA quintile.

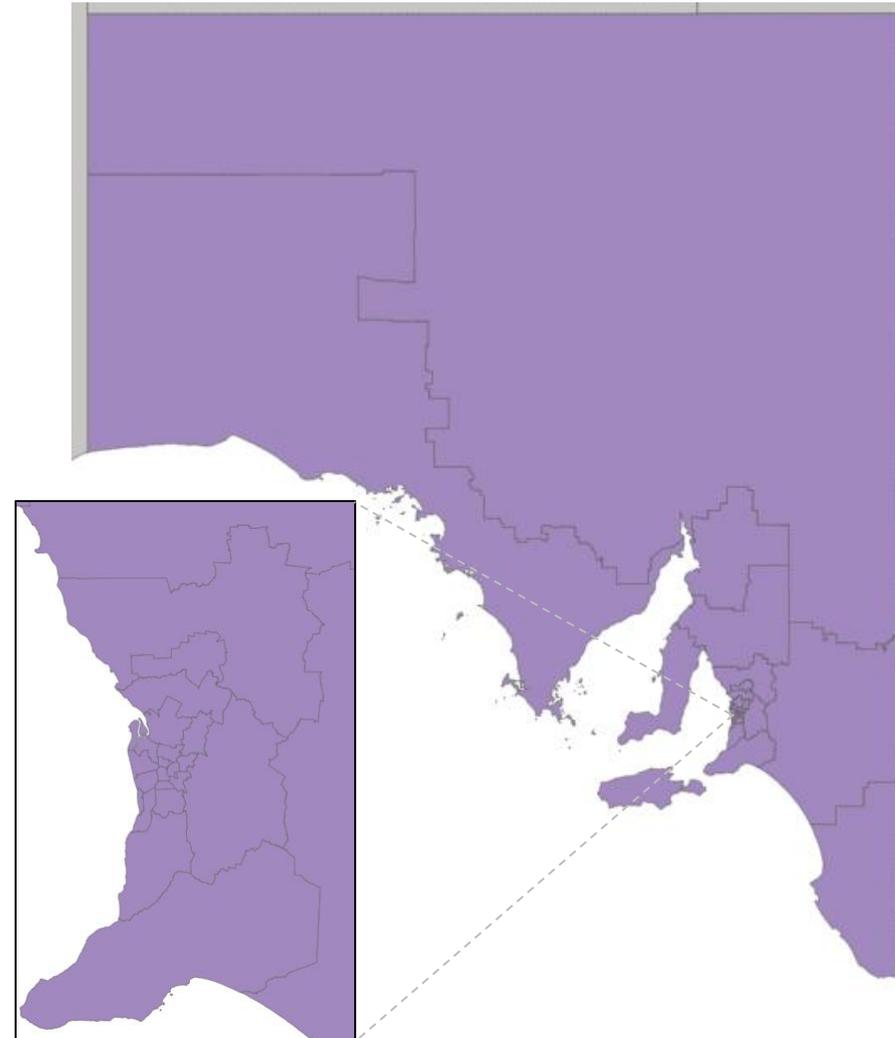
<sup>^</sup> Note: Some children have more than one parent or guardian associated with their enrolment. As such, the affordability index was calculated on a per child basis for each of the associated parents or guardians of that child.

## Statistical Area geographies used in reporting

### South Australian Statistical Area 2s (SAs)



### South Australian Statistical Area 3s (SA3s)



### Metropolitan boundaries employed



[Return to LDC metropolitan status summary](#)

This report draws on a sector survey, data submissions to the Royal Commission, and publicly available information.

This report provides a summary of information obtained from a range of sources, including:

- A sector survey, completed by 337 non-government services between January and February 2023
- Data requests to South Australian and Commonwealth agencies including data from the Child Care Subsidy System (CCSS), National Workforce Census, and from the South Australian Department for Education
- Publicly available information including data from the Australian Children's Education and Care Authority (ACECQA)

The reporting represents a point-in-time view of the sector, which is dynamic and responsive to ongoing changes (as outlined on [page 3](#)). Moreover, the underlying datasets have different collection and reference periods. For example, the National Workforce Census relates to April/May 2021, Child Care Subsidy System data is available for January 2019 – September 2022 (inclusive), ACECQA data is from Q4 2022, and the sector survey reflects a view from services at the time of collection, in early 2023.

Additionally, each dataset contains a different set of services, based on industry entries, exits, and changes in ownership between reference periods, based on the purpose for which the data was originally assembled, and based on the participation rate in the original data collection. As a result, there is some variation in the sizes of samples from which information is drawn. This is noted where applicable.



### Sector survey

The sector survey was fielded between 17 January 2023 and 17 February 2023. All non-government services operating in South Australia, as reported by ACECQA, were invited to complete the sector survey. For small-medium and standalone providers, it was recommended that the centre director complete the survey. For large providers, completion was organised centrally. The response rate was 69%, with 318 long day care survey responses and 19 non-government preschools within the final dataset. It is likely that there is bias in survey completion to those with capacity and interest to contribute to the survey. Large providers are overrepresented compared to standalone and small-medium providers. (See more on survey representativeness [here](#)). Additionally, the survey represents self-reported information which could not be independently verified.



### Child Care Subsidy System data

CCSS data is designed to specifically capture funding-related information. This means the data does not provide insights into all aspects of use and operations, such as service utilisation. Moreover, some potentially identifying information could not be shared for this analysis, such as precise metrics of home address or distance from the home address to service.



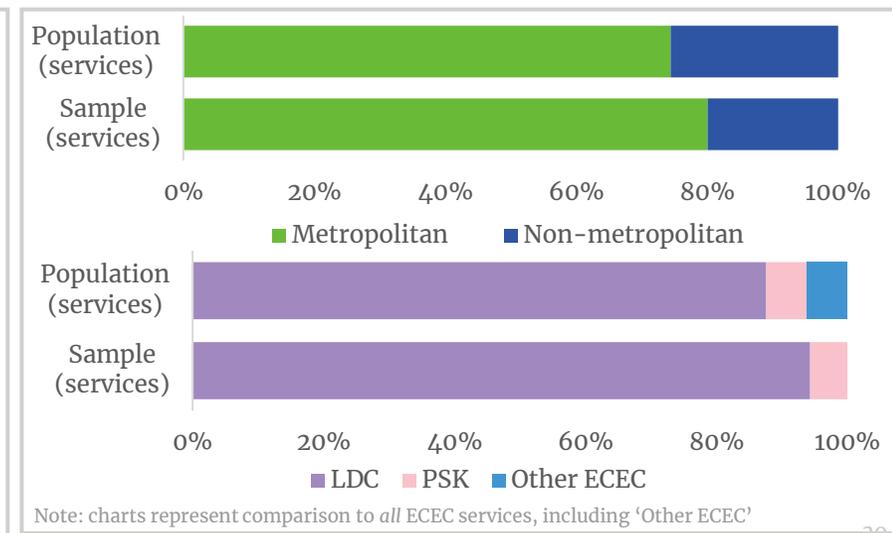
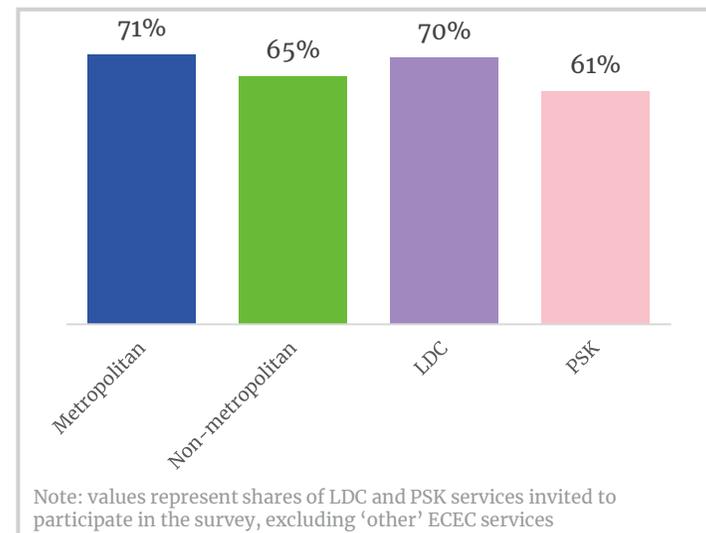
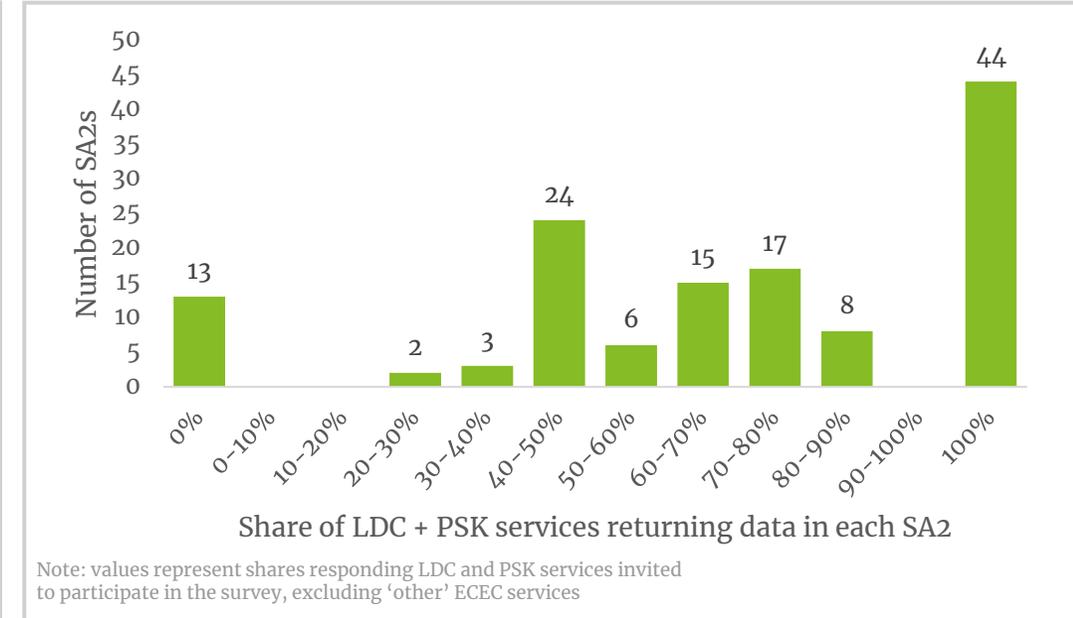
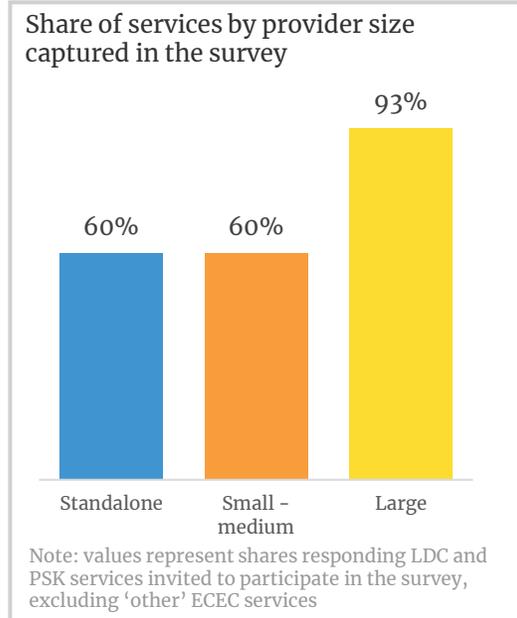
### Publicly available information

The ACECQA datasets used in this report do not contain all services considered in scope – 11 of the 'other ECEC' services explored on [page 32](#) are not covered by the national framework.

# Representativeness and validity of survey

A high response rate to the survey helped drive good statistical validity, with coverage across LDCs and PSKs and especially for metropolitan services.

- 337 services returned survey data for this sector mapping.
- This covers 69% of the long day care and preschool services invited to participate in the survey.
- The 31 'other ECEC' services were identified following the survey process – with these additional services, coverage is 66% of all services considered in this analysis.
- Overall, this total response rate allows reporting at the 95% confidence level with confidence intervals of approximately 3% either side of the point estimates.
- Considering the services that returned data, there is coverage of 7 in 10 LDCs and 6 in 10 PSKs. For LDCs, this gives confidence intervals of 3% at the 95% confidence level. For PSKs, this is higher at 15%, reflecting the lower population size and lower response rate.
- Non-metropolitan services are less represented than metropolitan services. Survey results from metropolitan services can be reported with a 3% confidence interval. For non-metropolitan services, this is 7% for preschool and long day care centres.
- Across SA2s, there are 13 SA2s from which no services invited to participate returned survey data. These regions typically had only one provider in total. 4 of these regions were metropolitan, and 9 were non-metropolitan.
- For small-medium and standalone providers, it was recommended that the service director complete the survey. For large providers, completion was organised centrally. Large providers are overrepresented compared to standalone and small-medium providers, but all can be reported with a confidence interval of 7% or lower at the 95% confidence level.
- It is likely that there is bias in survey completion to those with capacity and interest to contribute to the survey.



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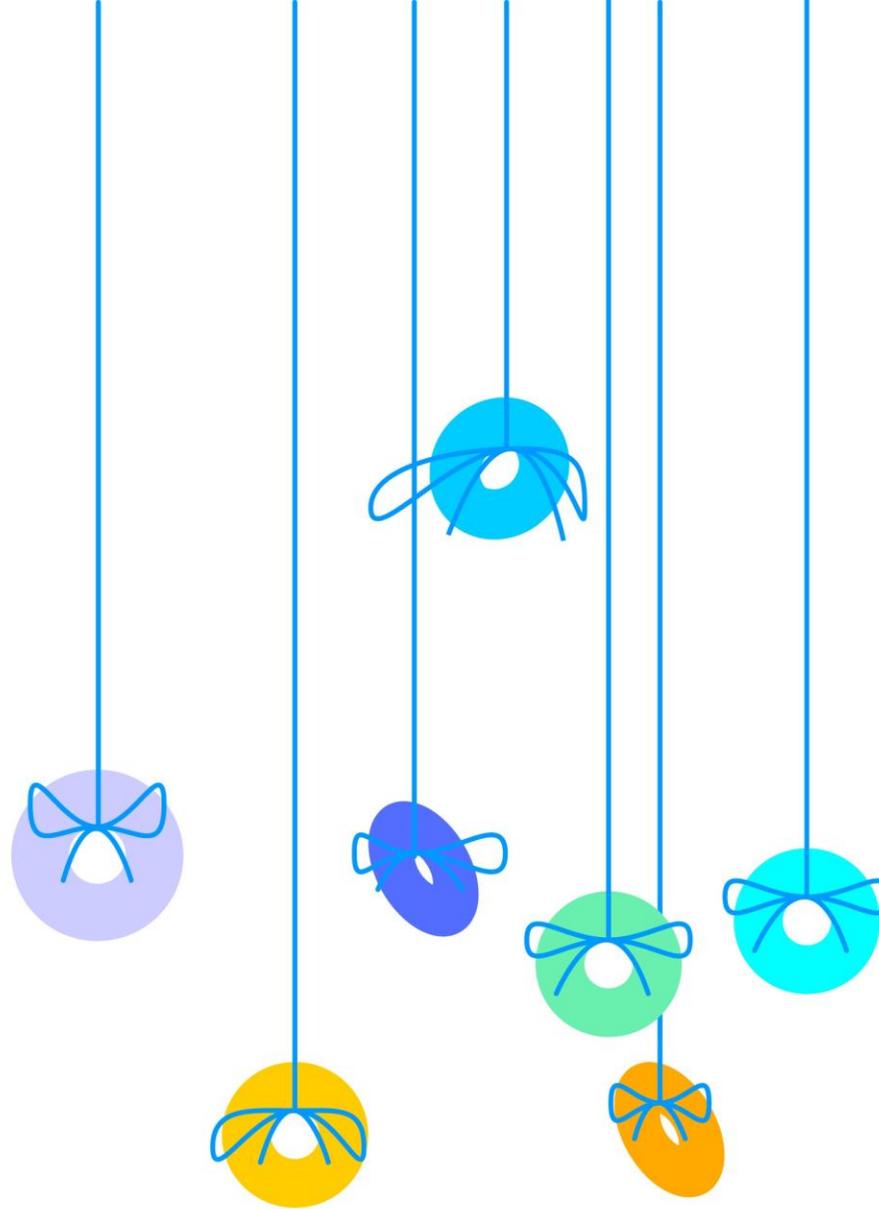
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Data provided from the below sources were used in calculations by Deloitte Access Economics for this report

Source
Australian Bureau of Statistics. (2021). Population: Census. ABS. < <a href="https://www.abs.gov.au/statistics/people/population/population-census/2021">https://www.abs.gov.au/statistics/people/population/population-census/2021</a> >.
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