

A close-up photograph of a woman with dark hair and glasses, smiling warmly while holding a young child with reddish hair. The woman is wearing a dark blue t-shirt, and the child is also wearing a dark blue t-shirt. The background is a soft-focus outdoor setting with green foliage and a warm, orange-toned light.

the
Front
Project

WORK AND PLAY 2023

Understanding families experiences and perceptions
of Early Childhood Education and Care

Having recognised the need for a more deeper and more nuanced understanding of families needs, choices and experiences regarding Early Childhood Education and care (ECEC), the Front Project engaged Heartward Strategic to undertake a program of primary research with parents of children aged 0-5.

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

HEARTWARD STRATEGIC

The research was funded by the Paul Ramsay Foundation (grant number: 5077). Any opinion, findings, or conclusions expressed in this report are those of the author (s) and do not necessarily reflect the views of the Foundation. The Foundation would like to thank its partners who were involved in this research for their contributions.

The Paul Ramsay Foundation's mission is to break cycles of disadvantage in Australia. We focus on the most stubborn barriers to change, where multiple cycles of disadvantage collide and experiences of disadvantage persist across generations.

paulramsay FOUNDATION

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FOREWORD FROM THE CEO



Every day millions of Australian families send their children to an early childhood education and care (ECEC) service. Behind the colourful drawings and play based activities is a complex system that is working hard to support the learning and developmental outcomes of children, enable parents to work, and address entrenched disadvantage in our communities. Families play such an important role in the ECEC system. They, along with children, are the key beneficiaries and it's critical their needs and experiences are heard.

Two years ago, the Front Project sought to elevate the voice of families. We wanted to understand more about how they experience ECEC. We asked:

1. What do families think about ECEC services and what do they value?
2. What do they think about cost and access?
3. Is the system meeting their needs and what do they think needs to change?

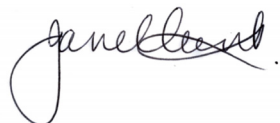
The answers to these questions formed the basis to the Front Project's 2021 Report Work and play: Understanding how Australian families experience Early Childhood Education and Care ([2021 Work and Play study](#)).

The answers to these questions are more important than ever. That's why we have once again commissioned Heartward Strategic, an independent social research consultancy, to help us understand how families are experiencing and perceiving ECEC in 2023.

The pandemic reinforced to families the critical role ECEC has in enabling the learning and development of their children and supporting them to work. It is against this backdrop that the government made a commitment to work towards a universal, high-quality, accessible, affordable and equitable ECEC system for all children and families in Australia.

With increasing attention on ECEC in Australia and several important reforms taking place, one thing must remain steadfast: the needs of the system's beneficiaries, families and children, are at the core of the future system.

This report provides valuable insights in how families think, feel and make decisions around ECEC and how we can ensure the system better meets their needs. Not only will families benefit from having their voices heard, but importantly so will their children, which is critical for the future of early learning and care in Australia.

A handwritten signature in black ink, appearing to read 'Jane Hunt', with a large, stylized initial 'J'.

Jane Hunt,
Chief Executive Office
The Front Project



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EXECUTIVE SUMMARY & POLICY IMPLICATIONS

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EXECUTIVE SUMMARY

ABOUT THE REPORT

This report presents the findings from research conducted from June to August 2023, two-years on from similar research, reported in *Work and play: Understanding how Australian families experience early childhood education and care* (the 2021 Work and Play study). The research aimed to extend on this previous work by exploring:

- families current experiences as users of early childhood education and care (ECEC) services, particularly in relation to recent changes to 3-year-old and 4-year-old kinder/preschool in some states and to the Federal Government's Child Care Subsidy (CCS), and in a context of increasing cost of living pressures
- beliefs about, and narratives used, when thinking and talking about ECEC
- perceived and experienced benefits of ECEC
- understanding and perceptions of quality as it relates to ECEC
- views on how the system could be better designed to meet families needs.

The core research was conducted with parents and guardians of children aged 0–5 years whose children are not yet at school and educators and teachers working in ECEC. These audiences participated in 9 qualitative triad group discussions, an online survey (completed by 1,000 parents and 147 ECEC teachers and educators between 24 July to 4 August), and 6 narrative interviews.

A follow-up poll of 1,025 parents and guardians of children aged 0–5 years was conducted between 20-29 October 2023 to re-examine awareness and impacts of the Federal Government's CCS some months after they came into effect on 10 July 2023.

KEY FINDINGS

FAMILIES EXPERIENCES AS USERS OF THE ECEC SYSTEM

- Echoing the findings from the 2021 Work and Play study the survey showed **high rates of use of education and care services among Australian families for children who are not yet attending school**. Of parents surveyed, 72% were currently accessing some type of education and care services for their children. For the vast majority (70% of surveyed parents), this was a paid ECEC service such as long day care, family day care or sessional kinder/preschool.
- **Regular reliance on a combination of types of paid and unpaid education and care** for children was common for families, with 42% reporting that they were currently using more than one type of paid and/or unpaid support for their children's care and education.
- **Affordability and a perceived lack of need** due to a parent/guardian being at home to care for the children were the most common reasons for not currently using ECEC, each mentioned by around 2 in 5 parents surveyed. Access issues were also prominent outside of metropolitan areas, with 39% living in regional/remote Australia who do not currently use paid education and care citing difficulty in getting a place as a reason for this.
- Highlighting **broader issues with affordability, access and flexibility**, among parents surveyed:
 - 61% agreed that the decisions that they have made regarding the care and education of their children have come with significant financial sacrifices.
 - 50% agreed that they have found that once the cost of care is factored in, it's hardly worth working.
 - 49% agreed that they have had to change work arrangements to fit in with the care that they can find/afford.

* Any difference in data between what's published in the Figure and the report is due to different types of rounding that occurred between data points. Where this is the case, the number in the body of the report should be referenced.

- The COVID pandemic and high cost of living challenges have impacted families needs and how they consider and use ECEC services.
 - **42% said the pandemic had impacted their family's education and care arrangements**, most commonly because they had used paid care and education to increase children's opportunities for socialisation (11%), or because they had reduced children's days/hours in ECEC since the pandemic (10%).
 - **67% said that the current economic environment had impacted their family's education and care arrangements** - 27% had or were considering leaning more heavily on informal childcare supports, 27% had or were considering returning to work earlier than planned, and 25% had or were considering increasing their income to cover childcare costs.
 - In the main survey, 74% of parents said they were aware of changes to the CCS, which had come into effect just before the survey was in field. In the follow-up poll, taken between 20-29 October, this figure was 69%.
 - Among users of ECEC aware of these changes:
 - 42% in the main survey perceived they were **now paying less overall for the services their children use** as a result of changes to CCS. This figure was almost identical in the follow-up poll (43%).
 - 5% in the main survey reported having **increased the number of hours/days of ECEC they use**, in response to CCS changes. In the follow up poll, this figure had increased to 14%.
 - 61% in the main survey believed the **service/s they use had raised their fees in response to the CCS changes**. In the follow up poll, this figure had decreased to 52%.
- Additional analysis on the follow-up poll data shows that 52% of ECEC users aware of the CCS changes reported a net benefit from these changes, in that they had been able to increase the number of hours/days of ECEC they use and/or they perceived they were now paying less overall for ECEC services, irrespective of whether their service might also have increased fees.
- There is varied levels of awareness of changes or planned changes to preschool and kinder across Australia.
 - 56% were aware of recent/planned changes to preschool/kinder across different parts of Australia. **Some had already factored these changes into decisions they have made about education and care for their children.**
 - Victorian parents in the qualitative research were strongly supportive of free 3-and-4-year-old kinder. Other parents wanted the benefits to children and how fees/subsidies would be applied to be more clearly articulated, and concerns about compulsory attendance and the capacity of the system to cope to be allayed.
- The qualitative research revealed that, while recent measures introduced to improve the affordability of ECEC for families are widely welcomed, many families do not perceive they are receiving these benefits, with some long day care services reportedly not passing on or not fully passing on any cost savings to families.

BELIEFS AND NARRATIVES ABOUT ECEC

- Almost all surveyed parents agreed or strongly agreed that:
 - **early childhood is a critical time for development** (92%)
 - **we have a collective responsibility to ensure all young children receive quality care and education** (91%)
 - **high quality ECEC gives children a good start for school and beyond** (91%). Parent agreement with this statement was higher than the 83% reported in the 2021 Work and Play study.
 - **ECEC educators and teachers have a significant impact on children's learning and wellbeing** (89%). Parent agreement with this statement was higher than the 83% reported in the 2021 Work and Play study.

- Key beliefs about different ECEC settings included:
 - long day care mainly benefits parents that have to work full time and is more focused on care than education – in the survey, **43% of parents agreed or strongly agreed that long day care centres mainly provide a babysitting service**
 - **sessional kinder/preschool has a greater focus on education**
 - **family day care is less regulated, is mainly unstructured play**, but allows carers to develop close stable bonds with small children.

PERCEIVED BENEFITS OF ECEC

- Benefits of ECEC widely perceived by both parents and ECEC professionals included:
 - supporting families, most notably enabling parents to work or study and making it easier for women to participate in the workforce.
 - supporting child growth and development, particularly development of communication, social and motor skills.
- Some parents expressed a belief that benefits for children engaging with ECEC apply more to older than younger children:
 - 51% of parents surveyed agreed or strongly agreed that babies and very young children are best looked after by family at home, with the qualitative research suggesting many are thinking of children aged under 3 years.
 - In the qualitative research parents expressed the belief that from 3 years and up, children have an increasing need for 'socialisation' and some instruction in literacy, numeracy and skills that will enable school readiness.
- Despite the widespread recognition that ECEC enables parents to work, that ECEC therefore delivers the benefit of less financial pressure on household/families, is not widely maintained - more parents in the survey rejected this notion (38%) than agreed with it (33%).

DRIVERS OF QUALITY

- Parents in the qualitative research expressed a belief that **the quality of ECEC in Australia is high relative to some other countries**, but also varies across settings and locations.
 - Quality in the sector is understood to be governed by appropriate regulation, though parents also perceive that service and worker shortages inhibit the delivery of quality care and education.
 - Many parents are operating in an environment where they lack free choice over the services they use and encounter barriers to determining quality, so this becomes a secondary driver of ECEC decision-making. Some families report feeling locked into services they do not perceive as high quality because they lack other options.
- **The way in which staff members interact with children** was seen by 80% of parents and 79% of ECEC professionals as an extremely strong indicator of quality. The ratio of workers to children (69%), the **cleanliness** of the facility (68%), whether **children are happy and excited to go** there (68%) and **how the centre communicates with and involves parents about their child's progress and activities** (66%) also emerged in the survey as signifiers of quality for the majority of most parents and ECEC professionals.
- Surveyed ECEC professionals recognised a wider range of indicators of quality than parents, focusing on **developmental opportunities that services provide for children** such as provided for creative and imaginative play (72%), provided for physical development, such as gross motor activities and sports (71%) and provided for cognitive development, such as activities that develop knowledge, skills and problem solving (67%).
- Parents and ECEC professionals generally view the price charged for an ECEC service, and whether it is run for profit as **unreliable indicators of quality**.

DESIGNING THE SYSTEM TO BETTER MEET FAMILIES NEEDS

- Consistent with the 2021 Work and Play study, parents' primary stated needs when it comes to the education and care of their 0–5-year-old children are focused on the child's safety and growth. However, when considering their 'top 3' needs, it is clear that the need to work and have care that fits around work underpins much ECEC decision-making.
- Consistent with findings from the 2021 Work and Play study, parents continue to report their **needs are not fully being met by the care and education arrangements they have in place** for children who are not yet old enough to attend school. Surveyed parents accessing centre-based/long day care or preschool/kinder were more likely to report their needs are being met than parents accessing home-based paid care or with children being cared for exclusively by a parent.
- Parents and professionals have many suggestions for how the ECEC system could better meet the needs of families, which include improving access, flexibility, the indicators on which quality is rated by government, conditions and pay for workers, and changes to broader structures such as workplaces and the schooling system to better incorporate or align with the education and care of young children before they are old enough to attend school.

KEY INSIGHTS

This research reconfirms a number of findings about Australian families and ECEC reported in previous research, and contributes the following new insights.

1. Lingering impacts of COVID are felt across the sector, impacting needs, access, quality and choices.
2. Cost of living pressures are prompting varied shifts in ECEC use.
3. Government policies to improve affordability of ECEC for families are welcomed and have benefited many families, but some parents may not perceive these benefits to be flowing through to them.
4. Changes to preschool/kinder are supported, but some lack awareness of the benefits of universal programs and anticipate unintended consequences.
5. Parents don't perceive a unified ECEC system or sector in Australia: they perceive care-oriented services and education-oriented services and attach different narratives to each.
6. Narratives and beliefs act as barriers to considering different forms of ECEC and fuel parental anxiety and guilt.
7. Quality of education and care is seen and experienced variably across ECEC settings and services.
8. Though parents and ECEC professionals are concerned about quality, barriers prevent quality being fully considered in decision making, and parents lack skills and tools to monitor quality over time.
9. Families needs are changing, and the system is slow to transform to meet them - new pockets of unmet need may be emerging that warrant attention.



POLICY IMPLICATIONS

This research provides valuable insights into what families need and want from a future early learning and care system, and how children stand to benefit from ambitious reform.

It shows the importance of listening to families so the system can effectively and efficiently provide children with universal access to high-quality services, regardless of location or background.

The findings identify the strengths within the current system, as well as the areas that need close examination and reform, to better meet its policy objectives of enabling parents and guardians to work, study or volunteer, to support the developmental and educational outcomes of children and to address entrenched disadvantage.

AFFORDABILITY

In July 2023 the Australian Government took important and welcome steps to reduce out-of-pocket expenses for most Australian families with the introduction of the Cheaper Childcare Package. The research shows that while this is a step in the right direction, Government will need to look at affordability, as it remains a key barrier for many Australian families, especially for households in the lowest income brackets where children stand to benefit the most. The Australian Government should consider whether the CCS, including the Activity Test, is fit-for-purpose as a way to ease cost-of-living pressures and ensure cost is no barrier for any Australian family.

ACCESS

The Australian Government could consider playing a more active role in market stewardship to ensure all Australian families can access ECEC in their local area. Particular focus should be on regional and remote communities and areas where there are increased rates of children who are developmentally vulnerable.

QUALITY

The Australian Government should continue to strengthen the consistent application of the National Quality Framework and National Quality Standards to help drive quality and improve outcomes for children across the ECEC system. Addressing workforce issues including pay, conditions and professional support to attract and retain staff will also act as a key driver of quality and continue to boost the standing of ECEC professionals in the eyes of families and their communities.

EQUITY

Research shows that families broadly support measures that provide additional supports to parents and children who may be experiencing structural or intergenerational disadvantage. Measures to boost equity in access, participation and outcomes must be a central focus of future system reforms.

FLEXIBILITY

Data shows that families want more flexible ECEC options to support parents and guardians in casualised or insecure work as well as families who face underemployment or underutilisation. Furthermore, deeper consideration into how ECEC, the schooling system and paid work can align more harmoniously will help to better support families and the choices they make or want to make in relation to the care and learning of their children.

FOR THE ECEC SECTOR AND WORKFORCE

The research shows that families greatly value the work of early childhood teachers and educators and the impact they have on children's lives. However, there is a persistent perception that there is a difference between the experience and benefits of ECEC for children aged 0-3 and older children aged 4 and 5 years. Whilst the sector has been working under nationally consistent standards and frameworks for quite some time now, parents and guardians don't always understand that the benefits of ECEC can be delivered across different service types and throughout the early childhood years. Families in the study reflected that they don't always have the information that they need to assess the quality of a centre, and once in service some families are seeking improved communication about the learning and development outcomes of their children.



GLOSSARY

Throughout the research, the following terms and definitions were used for the different types of education and care arrangements available to parents in Australia and these should be referred to in reading this report:

- **Parents/guardians** – the terms parents and guardians may be used in this report and refers to the people who are the primary carers of children. The term 'parents' where used by itself is inclusive of different types of kinship, caregiving, and guardianship arrangements.
- **Preschool/kinder** – Preschools or kinder for 3- to 5-year-olds, separate to long day care centres, usually running during school hours and during school terms (i.e., through community kindergartens, independent or government schools) and available to children in the years before they start primary school. Preschool/kinder programs vary from state to state.
- **Centre-based/Long Day Care** – Sometimes referred to as 'childcare'. Some centres may also offer a pre-school program within the day care centre. This does not include occasional care services such as holiday, creche, and out of school hours care services.
- **Family Day Care** - Where a professional carer looks after children in the carer's home.
- **Home-based paid care** - Provided by an individual whose time you pay or compensate for, such as a nanny or au pair. This does not include occasional paid care such as baby-sitting.
- **Home-based unpaid care** - Provided without payment, such as by a family member or friend. This does not include care provided by parents/guardians or occasional unpaid care/babysitting.
- **Parental care at home only** - Children exclusively being cared for at home by their parent/guardian without any other regular care/education.

Throughout the research and in this report, the acronym 'ECEC' refers to the formal Early Childhood Education and Care services offered to children in Australia aged 0-5 not yet in school which attract the CCS. These include preschool/kinder, centre-based/long day care and family day care. It excludes home-based paid and unpaid care and parental care at home. It also excludes education and care services for school-aged children, such as Out of School Hours Care.



ABOUT THE RESEARCH

STUDY CONTEXT AND AIMS

In 2021, the Front Project established a program of research to provide a deeper understanding of families choices regarding early childhood education and care (ECEC), and their experiences as users of this system. This inaugural piece of independent research was publicly reported in [the 2021 Work and Play study](#) and found that:

- families value ECEC but want the system to improve
- costs impact whether or not families use ECEC services
- families value quality but struggle to define it
- there are opportunities for the system to work better for families.

This report presents the findings from a second piece of independent research, conducted two years on from the Work and Play study. This second wave of research was designed to further extend and deepen understanding of how families experience Australia's ECEC system, with a particular focus on:

- families experiences of the ECEC system as system users, particularly in relation to recent changes including:
 - changes to 3-year-old and 4-year-old kinder/preschool
 - changes to the CCS
 - the increasing cost of living
- beliefs about, and narratives used, when thinking and talking about ECEC
- perceived and experienced benefits of ECEC
- understanding and perceptions of quality as it relates to ECEC
- how the system could be better designed to meet needs.

This second wave of research also sought to draw in the perspective of ECEC professionals (educators and teachers) working in the sector.

As changes to CCS came into effect during this research program, an additional follow-up poll was also initiated three months after the core research to further gauge impacts of these changes on families.

RESEARCH METHOD

The research fieldwork was undertaken over four stages from June to October 2023 and included the following components:

- 9 x 1.5-hour online triad discussions with parents and ECEC professionals (mini-focus groups with 3 participants in each), completed from 14 – 27 June.
- 15-minute online survey, completed by 1,000 parents and 147 ECEC professionals, in field from 24 July to 4 August.
- 6 x 45-minute online narrative interviews with selected parents reconvened from the first stage, completed on 16 and 17 August.
- A follow up five-minute online poll of 1,023 parents, using the same sampling approach as the main survey, in field from 20-29 October.

For the purposes of this research these audiences were defined in the following ways:

- **Parents and guardians** – parents and guardians of at least one child aged 0-5 years who does not yet attend primary school and who has involvement in decisions about the children's care.
- **ECEC professionals** – degree qualified early childhood teachers or certificate/diploma qualified early childhood educators, who work in an early childhood education and care setting, including long day care, family day care and/or preschool/kinder.

QUALITATIVE DISCUSSIONS AND INTERVIEWS

Table 1 below summarises the sample structure for the nine Stage 1 triad discussion groups. Triad discussions are focus groups with three participants and the recruitment of these groups sought to convene like participants together to aid group cohesion and maximise comfort to speak openly.

CORE SPECIFICATIONS			
PARENTS/CARERS			
Gp No.	CHILD AGE	ECEC USE	SES & LOCATION
1	0-2 years	Child enrolled in formal ECEC	Mid-High SES; Metro
2	0-2 years	Child enrolled in formal ECEC	Low-med SES; Regional
3	0-2 years	Uses informal care exclusively	Mix SES, any location
4	3-5 years	Child enrolled in formal ECEC	Low-med SES; Metro
5	3-5 years	Child enrolled in formal ECEC	Mid-High SES; Regional
6	3-5 years	Informal care exclusively	Mix SES, any location

ECEC PROFESSIONALS		
	ECEC ROLE	LOCATION
7	Early Childhood Teachers	Metro VIC
8	Early Childhood Educators	Outer metro NSW/QLD
9	Mix ECEC Teachers and Educators	Regional/rural locations in other states and territories

Following the main online survey, six parents were reconvened from the earlier triad discussions to participate in individual 45-minute narrative interviews. A diverse group of parents were selected for these interviews, with the purpose of understanding their education and care journey in more detail and to further explore themes emerging from the triad discussions and quantitative survey.

Recruitment of participants for the triad discussions and the narrative interviews was completed by accredited research recruiter, Focus People, guided by a recruitment screening questionnaire.

An incentive (digital gift card of \$90 for parents and guardians and \$110 for ECEC professionals) was provided to facilitate participation in the project. A further gift card of \$90 was provided to parents completing the narrative interviews.

All discussions and interviews were facilitated by Heartward consultants.

QUANTITATIVE SURVEYS

The main online quantitative survey was designed by Heartward based on the research objectives and emerging themes from the group discussions. A small number of questions and response options were repeated from the 2021 Work and Play study.

The main survey took an average of 15 minutes for people to complete and was completed by 1,000 parents/guardians of children 0-5 years not at school, Australia-wide, and 147 ECEC educators and teachers. Random stratified sampling was used to ensure the sample was roughly representative of the population (based on location, gender and household income). ECEC educators and teachers completing the survey could also be counted in the parent sample if they were also parents of children aged 0-5 not yet at school.

Survey programming ensured that parents and professionals only received questions relevant to them. For example, parents of children 0-5 years who also work as ECEC professionals received questions aimed at parents and also those aimed at professionals.

The follow-up poll repeated three sections of the main survey: the sample screening questions, one section on changes to CCS, and the demographic questions. It therefore followed the same sampling approach as the main survey, however, only those who were parents were taken through to complete the survey questions about CCS (that is, any people who were professionals but not parents were screened out, as the CCS questions were not relevant to this audience). In total, 1,025 parents completed the follow-up poll, which took an average of five minutes to complete.

The main survey and the follow-up poll were programmed and hosted online by The Online Research Unit (ORU), an accredited survey fieldwork company. Participants for each of the surveys were drawn from ORU's panel of individuals pre-registered to complete online surveys, and incentivised in line with their panel membership. The ORU managed survey invitations and reminders to the panel.

The final samples completing the main survey and the follow up poll were matched on key demographic variables, meaning that corresponding findings from both surveys can be reliably compared against each other. Demographic details of the final samples for the main survey and the follow up poll are provided in Appendix A.

READING THIS REPORT

This report weaves together description and interpretation of the research findings from all of the data collection methodologies in its main body. A further layer of interpretation is provided at the end in a discussion of the research findings.

Each sub-section of this report begins with a discussion of the relevant findings from the quantitative research, with survey frequencies reported at the overall sample level, followed by breakout boxes in which relevant associated findings from the qualitative research components are reported along with verbatim quotes from qualitative research participants. The aim when reporting these qualitative findings was to aid interpretation of the quantitative survey results by providing additional nuance and insight on research topics.

In some sections, the results of additional quantitative analyses are reported. These are the results of statistical tests applied to certain research questions of interest and these are reported where meaningful significant differences in survey results were observed between subgroups in the survey population, for example between people in different locations, with different levels of family income or on other variables of interest.



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FINDINGS

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FINDINGS

This chapter discusses the findings drawn from all research elements conducted with parents of children aged 0-5 years who are not yet in school and ECEC educators and teachers. This includes the main quantitative survey and follow-up poll, and qualitative group discussions and narrative interviews. Findings are reported thematically under the following five topics, which align with the research objectives:

- families experiences as users of the ECEC system
- narratives and beliefs about ECEC
- perceived benefits of ECEC
- drivers of quality
- designing the system to better meet families needs.

FAMILIES EXPERIENCES AS USERS OF THE ECEC SYSTEM

This section focuses on research findings relating to current use and experiences of ECEC, with a particular focus on topical issues and changes relevant to system use and experiences.

- how families are currently using education and care services
- reasons for using ECEC
- barriers to use of ECEC
- affordability and impact on workforce participation
- impact of the COVID-19 pandemic on ECEC arrangements
- impact of the current economic environment on arrangements for care and education
- impact of changes to the CCS
- impact of changes to preschool/kinder.

HOW FAMILIES ARE USING EDUCATION AND CARE SERVICES

Consistent with the 2021 Work and Play study, this research revealed high rates of use of education and care services among Australian families.

The large majority (91%) of parents with children 0-5 years who are not yet at school had, at some point, accessed education and care for these children outside of care provided by a parent/guardian in the home. Most parents (81%) indicated that they were currently doing this.

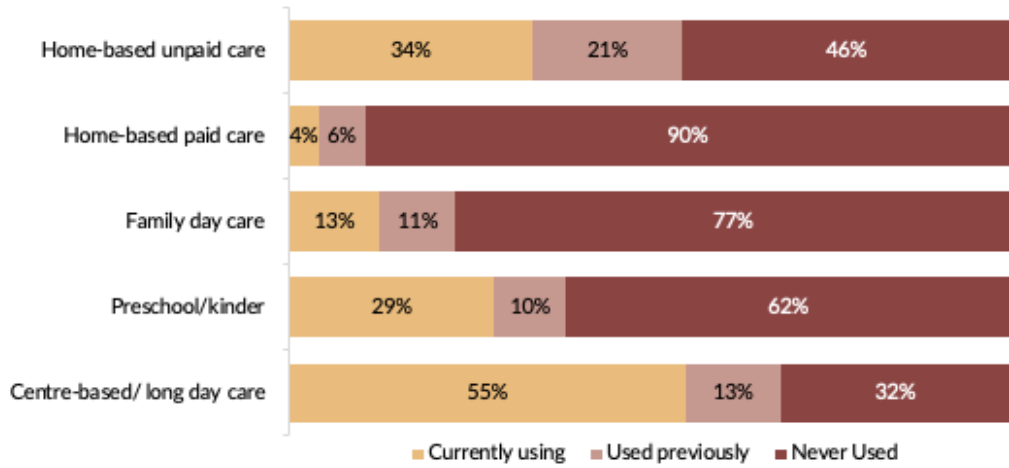
Almost three quarters of parents participating in the main survey (72%) were currently accessing paid education and care services for their children, and the vast majority of these (70% of all parents surveyed) were specifically accessing an ECEC service, that is, family day care, centre-based/long day care, or preschool/kinder.

As shown in Figure 1, centre-based/long day care was the most used type of ECEC service, with 69% of parents of 0–5-year-olds not yet in school ever having used this type of service for these children, and 55% currently doing so. Preschool/kinder was the next most used type of ECEC service, with 38% ever using and 29% currently using this service for their 0–5-year-old children.

As revealed in the 2021 Work and Play study, reliance on multiple types of education and care for children was common. More than two in five parents (42%) reported that they were currently doing this. Multiple types of services may have been used for the same or different children aged 0-5 years in their family.

Among the group of parents using a combination of education and care types, many different combinations of arrangements were reportedly being used. As reported in 2021, the use of more than one form of care and education was most common among those currently using home-based paid care such as nannies (95% of these families were also using another form of education and care), and least common among those using centre-based/long day care (60% of these families were also using another form of education and care).

Figure 1. Use of education and care services



Question: This question is about your children currently aged 0-5 and not yet at primary school. Excluding care provided by their parents/guardians, which if any of the following have you used for their care and education?
Base: All parents of children 0-5 not yet at school (n=1,000)



QUALITATIVE FINDINGS – USE OF EDUCATION AND CARE

The qualitative research highlighted that education and care choices are driven by a combination of:

- **Necessity** - parents report the need to work, study and fulfil other care responsibilities as foremost in their decisions about whether they need to access education and care. The structure of work, study and other responsibilities dictates the types of education and care they can consider.

“Whilst I’m part time I can juggle, it was ok, but now that I’m going back to full time we need child care.”

PARENT OF 0-5-YEAR-OLD

- **Availability and accessibility of education and care types** - this includes whether families have access to informal care options such as grandparents, the different types of ECEC services in local areas, vacancy rates in these services, and the different jurisdictional arrangements/systems for preschool/kinder.
- **Beliefs and narratives about different types of education and care arrangements** - discussions with parents revealed that decisions about which types of education and care they will consider are consciously and unconsciously influenced by narratives and beliefs around early childhood development, ECEC and the benefits, and strengths and weaknesses of education and care types.
- **Needs of individual children** – parents reported considering the individual needs of each of their children and comparing these against the perceived strengths and weaknesses of different education and care types in meeting such needs. Children’s reported needs are based on beliefs about early childhood development, and observations of their child’s personality and how they are developing cognitively, emotionally, physically, and socially for their age.
- **Personal and family values** – discussions with parents revealed that they define and prioritise differently in their decision-making values associated with:
 - family connection and bonding, such as shared experiences, sense of belonging and unity and strong family relationships.
 - child safety and security, such as physical and emotional safety, secure attachments, stability and consistency and individual needs being met.
 - financial security, such as stability and freedom from financial stress, and ability to satisfy needs, wants and aspirations.
 - child independence and social connection, such as encouragement of autonomy, self-discovery and growth, exposure to diverse perspectives and experiences, development of social skills and friendship bonds.
 - fulfilment of potential, such as support to pursue passions and interests and achieve goals, opportunities for personal and intellectual growth, and creating an environment where potential can flourish.
 - parent personal and professional identity, such as pursuit of a fulfilling and rewarding career, sense of purpose and contribution to society.
 - child and parent mental health and wellbeing, such as focus on wellness, balance and/or resilience.
- **Financial considerations** – most parents report considering how much or how little income is required to be able to meet competing needs within their family and live a life that is aligned with their values. This influences both decisions around work and care, as well as the types of care and individual services that are considered.

WHY PARENTS ARE CHOOSING NOT TO ENGAGE WITH PAID ECEC SERVICES

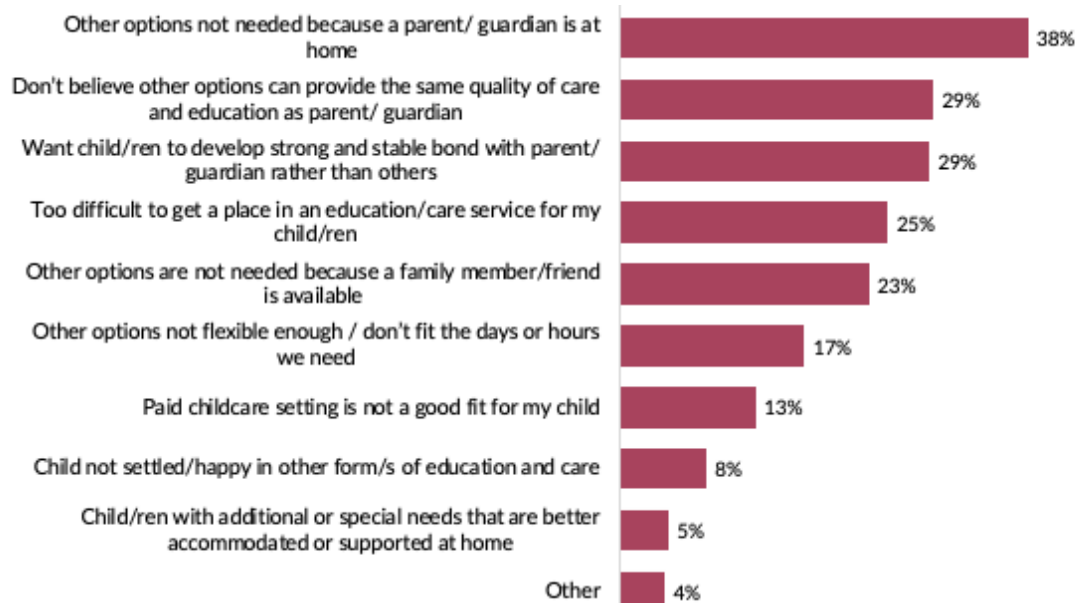
The main survey asked parents with children aged 0-5 years not yet at school who were not currently using any form of paid education and care, about the reasons for this arrangement. They were presented with 10 possible reasons as shown in Figure 2. The top two reasons provided, consistent with the 2021 Work and Play study, were:

- that paid care is not affordable to them, mentioned in 39% of cases.
- a perceived lack of need because of a parent/guardian being at home to care for the children, mentioned in 38% of cases, noting a further 25% mentioned paid care not being needed because a family member or friend is available to provide unpaid care.

Less common reasons for not currently using any form of paid education and care included:

- attitudinal barriers, such as a belief that other care options could not provide the same quality of care and education as the parent or guardian (29%), and a desire for their children to develop a strong and stable bond with their parent/guardian rather than others (29%).
- accessibility/flexibility barriers, such as difficult getting a place (23%) and/or days or hours not suiting the family's needs (17%)

Figure 2. Reasons for not currently using paid education and care



Question: When it comes to the care and education of your children aged 0-5 years not yet at school, which of these reflect the reasons for your current arrangements? Please select all that apply Base: Parents of 0-5-YEAR-OLDS not in paid care, n=284

To note, access issues were far more likely to be noted by parents living outside of metropolitan areas. Two in five parents (39%) living in regional or remote Australia and not currently using paid education and care, cited difficulty getting a place as a reason for this, compared to just 20% of parents living in a metropolitan area.

QUALITATIVE FINDINGS – USE OF EDUCATION AND CARE

The qualitative research sessions revealed a range of reasons why parents' education and care arrangements for their 0–5-year-old children did not involve the use of formal ECEC services. The considerations summarised in Section 3.1.1 were all relevant to their decision-making. In particular (and in line with previous research) the qualitative research showed:

- That putting a child into paid education and care for the first time is a daunting experience for some parents and that this decision tends to be delayed for as long as possible if other informal care arrangements are available such as a parent or grandparents providing care. As children get older, parents appear to become more comfortable with the thought of them attending day care or preschool, as most agree that children require more stimulation and peer interaction than what is offered in the home environment as they get closer to school-age.
- Few decisions about whether to use ECEC or not appear to be solely ideologically driven. While some express views that care for children in the years before school should not be 'outsourced' to paid service providers and/or is best delivered by family, this is rarely the only reason parents choose not to use ECEC. Most parents not using ECEC expect their children will at least attend preschool/kinder when they are old enough.
- Issues around the flexibility, accessibility, cost and perceived quality of ECEC (discussed in later sections of this report) often feature in decisions not to use ECEC services. For some parents the ECEC options available to them just do not meet their needs, for example if they are shift workers, or if children have additional needs they feel cannot be adequately met in ECEC.
- Those who choose not to use ECEC have mixed feelings about their choices:
 - Caring for children exclusively at home is reported as taking a toll on parents and grandparents and can be an isolating, thankless and tiring task at times, and parents who choose to stay at home also feel this choice comes with financial and personal/career costs. These thoughts all feed parental guilt.
 - Parents and grandparents are not always 'up to date' on the latest views on child development and there can be tensions between grandparents' and parents' values/approaches to child rearing.
 - Children get to develop strong bonds and treasured memories with parents and grandparents in the years before school, which parents feel are fleeting and precious. Many parents speak of not wanting to regret having missed crucial times with their children in these younger years.



ECEC AFFORDABILITY AND IMPACT ON WORKFORCE PARTICIPATION

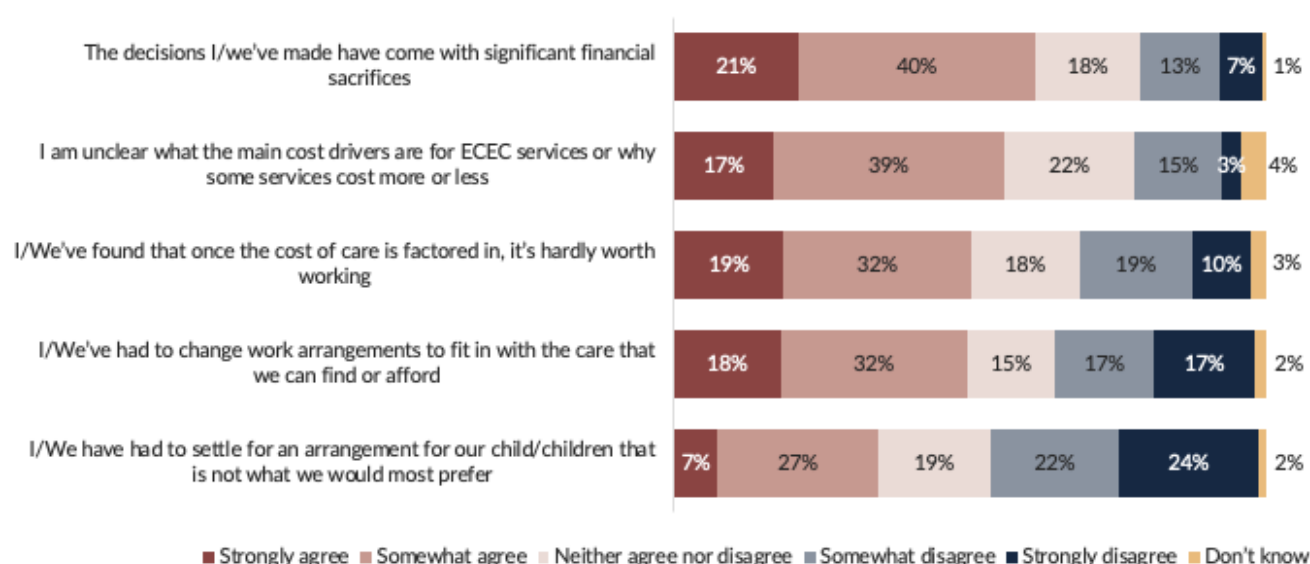
As shown in Figure 3, three in five parents (61%) participating in the main survey agreed (either strongly or somewhat) that the decisions that they have made regarding the care and education of their 0-5-year-old children (not yet at school) have come with significant financial sacrifices.

Half or more parents surveyed indicated that childcare costs are opaque and a barrier to parents working, specifically agreeing that:

- once the cost of care is factored in, it's hardly worth working (50%)
- it's unclear to parents what the main cost drivers are for ECEC services or why some cost more or less (56%)
- parents have had to change work arrangements to fit in with care they could find or afford (49%).

Just over a third (34%) of parents agreed that they have had to settle for an arrangement that is not what they would most prefer.

Figure 3. Agreement with statements relating to impact of education and care arrangements on workforce participation and finances



Question: Thinking about your experiences relating to the care and education of your 0-5-year-old children, please indicate how much you agree or disagree that...? Base: All parents of children 0-5 not yet at school (n=1,000)

Looking across key demographic groups within the main survey parent sample, parents more likely to agree that once the cost of care is factored in, it's hardly worth working, included:

- those working less than full time, if at all – 56% agreed, compared to 47% of parents working full time
- those on lower household incomes – agreement was significantly higher among those with an annual household income of less than \$122,000 (62% agreed with this statement, compared with 42% of those with an annual household income of \$175,000) and above.

QUALITATIVE FINDINGS – IMPACT ON WORK AND FINANCES

Several parents in the qualitative research said they had made compromises and sacrifices for their family's wellbeing that have impacts on work and finances. This was a sentiment expressed both by parents who have decided to use ECEC because they want or need to work, as well as parents who have chosen to work less or not at all, or in a different job, so they can spend more time with children in the years before school. Irrespective of arrangements, parents widely reported feelings of anxiety and guilt about their choices, with many wondering if they have made the right choices or feeling as if their choices have been constrained by circumstances outside of their control.

Several parents in the qualitative research mentioned high costs of centre-based/long day care and the lack of transparency in how these fees are set. Issues regarding fees that were raised in discussions included:

- Complex and difficult to understand payment records/invoices.
- Lack of transparency around what determines the prices that are charged and why these vary so much from service to service.
- Lack of transparency around how services apply government subsidies intended to increase affordability of ECEC, including the CCS and subsidies for pre-school programs.
- Having to pay fees for services even if they are not used or provided, for example on public holidays.
- Services with low vacancy rates requiring parents to pay fees in advance to hold a place for their child.

"In the end we decided it would be best for us to be as present as possible in the first five years... It has been a financial struggle... there have been times where I have been battling with myself whether I should go out and get a job."

PARENT OF 0–5-YEAR-OLD

"It's all compromise. If I got full time work, my husband would go part time, which I'd love...but I earn so much less. We don't spend a lot of money in terms of lifestyle... but in saying that, I want the girls to do swimming lessons and ballet... I feel like because I've made a career switch, I've got a lot more ground to catch up. I've felt as the primary caregiver, I feel the injustice of that... it's unfair. Unless you've got supports, one of those parents has to take a step back... even when they're in primary school. Someone's got to take the hit."

PARENT OF 0–5-YEAR-OLD

IMPACT OF COVID-19 PANDEMIC ON ECEC EXPERIENCES AND ARRANGEMENTS ECEC AFFORDABILITY AND IMPACT ON WORKFORCE PARTICIPATION

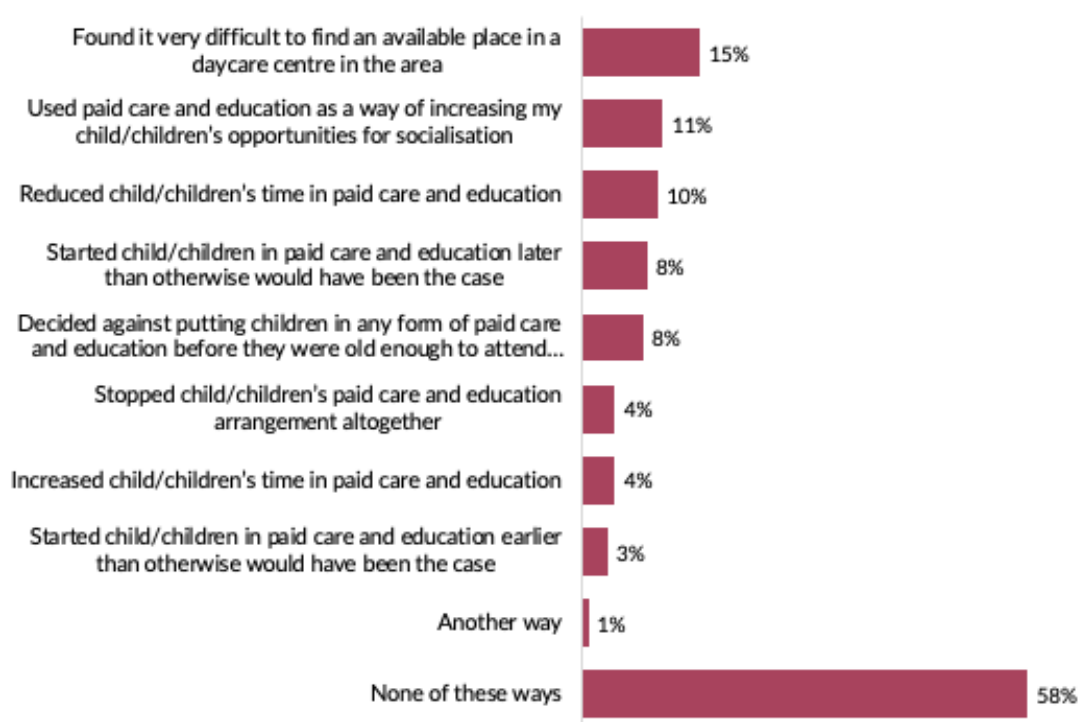
Parents completing the main survey were presented with eight ways that the COVID-19 pandemic may have impacted their family's arrangements for care and education of their children aged 0-5 years not yet at school. They were asked to select all that applied to them.

Two in five parents (42%) indicated that the pandemic has impacted their family's education and care arrangements.

As shown in Figure 4, the specific impacts of the pandemic on families have been considerably varied. The most reported impacts (each mentioned by at least 1 in 10 parents) included:

- lack of service availability in local areas (mentioned by 15% of all parents)
- deciding to use paid care and education to increase children's opportunities for socialisation (11%)
- reducing children's days/hours in paid education and care (10%).

Figure 4. Impact of pandemic on arrangements



Question: Has the COVID-19 pandemic impacted your family's arrangements for care and education for your 0-5-year-old children in any of the following ways? Base: All parents of children 0-5 not yet at school (n=1000)

Looking across key demographic groups within the main survey parent sample reveals a disproportionate, negative impact of the pandemic on early childhood education and care within families with lower household income and a parent working less than full time.

- Parents working less than full time (if at all) were more likely than those who work full time to say that they had started their children in paid care and education later than would have been the case if not for the pandemic (10% selecting this impact, compared to 7%).
- Parents on lower household incomes were more likely than those on higher incomes to say that they had decided against putting children in any form of paid care and education before they were old enough to attend preschool or school – likelihood of selecting this impact of the pandemic decreased with increasing household income, with those with a household income of less than \$121,000 most likely to select this impact (12% selecting this impact), and those with a household income exceeding \$255,000 per annum least likely to select this impact (just 3% selecting this impact).
- Parents living in metropolitan areas were more likely than those living outside metropolitan areas to say that they had reduced their children's time in paid care and education (12%, compared to just 4%), but less likely to say that they had found it very difficult to find an available place in a childcare centre in the area (14%, compared to 20%).
- Interestingly, parents working full time were more likely than those who work less than full time (if at all) to say that they had used paid care and education as a way of increasing their children's opportunities for socialisation (13% selecting this impact, compared to 8%).



QUALITATIVE FINDINGS – THE IMPACT OF THE COVID-19 PANDEMIC

Parents in the qualitative research reflected on the continued impacts of the COVID pandemic on their family. A number described their 0–5-year-old children as ‘COVID-babies’ and expressed concern about the impact that lockdowns (especially those in Victoria) and social distancing had on children’s development, particularly their social development. Most parents were keen to ensure these children had opportunities to socialise with other children and reported this being a key reason they decided to enrol them in day care or preschool/kinder. Some felt that their children continue to display characteristics such as anxiety and attachment issues they attribute to lack of early socialisation opportunities for these children.

“COVID really hit us going to places socially. You know, play groups, everything was kind of put on hold. Even going to swimming lessons, we stopped them, really, the social connections with other kids. I thought my eldest did have some issues socially interacting with other kids, but now she’s great, she’s enjoying kinder. She’s loving it.”

PARENT OF 0–5-YEAR-OLD

This was strongly echoed by ECEC professionals participating in the research, who reported behavioural and attachment issues in children they teach and care for which they attribute to the COVID pandemic.

Covid has impacted a lot of things, not just families and their income and jobs. But also, it’s hugely impacted the children’s development. They’re being referred to as “COVID babies” because they’re really delayed in their toileting, self-help skills and their language.

ECEC TEACHER

They have more separation anxiety. It’s like beginning again. They’ll start crying again when the mums leave. So, then it takes us time to settle them.

ECEC EDUCATOR

There’s more and more kindy children coming in nappies and pull ups and definitely a lot more learning difficulties coming through, and children who bring a lot of trauma and complexity into the room. That’s what I’ve really noticed. And our job as a teacher has evolved to be about getting these children to feel safe and nurtured and valued, and teach them how to speak to each other, and get through a day.

ECEC TEACHER

They need more support. So, then you find yourself stretched thin. I think that’s where the behavioural problems start as well because you’re expecting them to have a higher level of social skills than what they have. And you you’re meant to support them in building those social emotional skills. There’s not a lot of support from management.

ECEC TEACHER

QUALITATIVE FINDINGS – THE IMPACT OF THE COVID-19 PANDEMIC

Parents and professionals made several other observations about impacts of the COVID pandemic on families and the ECEC sector, including:

- Perceptions of worker burnout, evidenced through the increased use of screen time in long day care settings and anecdotal reports of increased numbers of accidents and incidents among staff and children in long day care, worker shortages and continued high rates of absenteeism.
- Reduced availability of places in ECEC in regional locations that have seen an influx of new residents during the pandemic.
- Increased flexibility in working arrangements that have continued since the height of the pandemic meaning that families no longer need the amount of education and care they did before, or that they did when their older children were younger.



IMPACT OF CURRENT ECONOMIC CONDITIONS ON ARRANGEMENTS FOR CARE AND EDUCATION

Parents completing the main survey were presented with six ways that current economic conditions, including inflation and rising interest rates may have impacted arrangements for the education and care of their children aged 0-5 years who are not yet at school. They were asked to select any impacts of these economic conditions that apply to them.

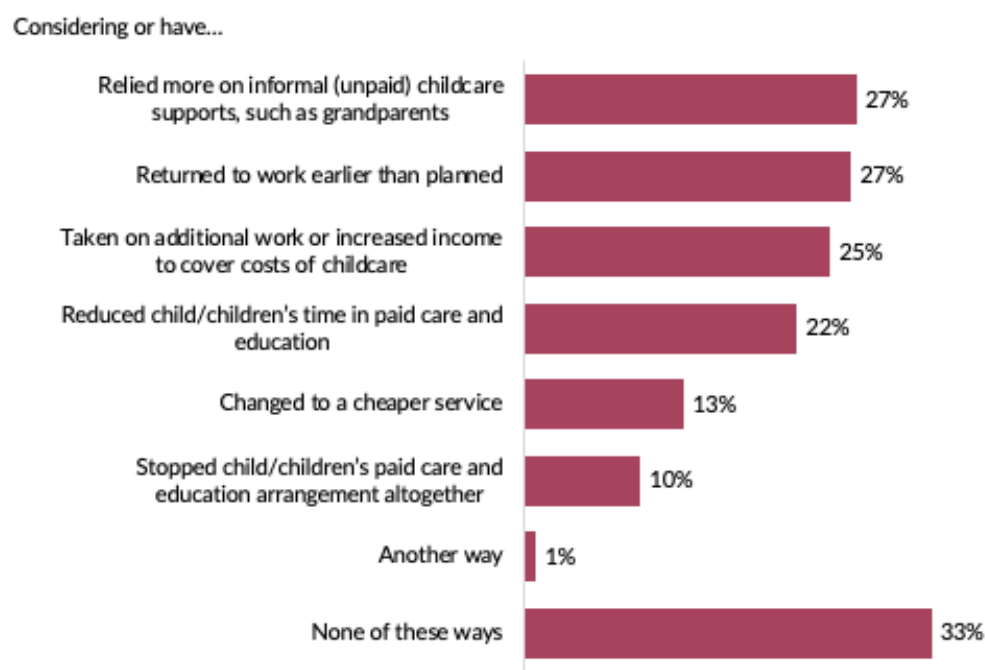
Just over two thirds of parents (67%) indicated that the current economic environment has impacted their family's arrangements in some way.

As shown in Figure 5, at least a quarter of parents reported that they:

- have leaned more heavily on informal childcare supports or were considering doing so (27%).
- have returned to work earlier than planned or were considering doing so (27%).
- have taken on additional work or increased their income to cover childcare costs or were considering doing so (25%).

One in ten parents surveyed (10%) indicated that they are considering or have stopped children's paid education and care arrangement altogether.

Figure 5. Impact of economic environment on arrangements



Question: How has the current economic environment of inflation and rising interest rates impacted your arrangements for care and education for your 0-5-year-old/s not yet at school? Please select all that apply. Base: All parents of children not yet at school (n=1000)

Looking across key demographic groups within the main survey parent sample again reveals a disproportionate, negative impact of the pandemic on early childhood education and care within families with lower household income and a parent working less than full time. In particular:

- Parents working full time were more likely than those who were not, to say that they had:
 - considered or changed to a cheaper service (16% selecting this impact, compared to 10%).
 - considered or reduced their children's time in paid care and education (25% selecting this impact, compared to 19%).
- Conversely, parents working full time were less likely than parents who work part time to say that they had considered or have returned to work earlier than planned (21% of parents working full time, compared to 33% of parents working less than full time).
- parents on lower household incomes were more likely than those on higher household incomes to say that they had:
 - considered or stopped their children's paid care and education arrangement altogether. The likelihood of selecting this impact of the current economic environment decreased with increasing household income, with those with a household income of less than \$70,000 most likely to select this impact (17%), and those with a household income exceeding \$255,000 per annum least likely to select this impact (just 3%).
 - considered or taken on additional work or increased income to cover childcare costs. The likelihood of selecting this impact of the current economic environment decreased with increasing household income, with those with a household income of less than \$175,000 most likely to select this impact (30%), and those with a household income exceeding \$255,000 per annum least likely to select this impact (12%).
 - considered or returned to work earlier than planned. The likelihood of selecting this impact of the current economic environment decreased with increasing household income, with those with a household income of less than \$175,000 most likely to select this impact (32%), and those with a household income exceeding \$255,000 per annum least likely to select this impact (13%).
- Parents in metropolitan areas were also more likely, compared to those outside of metropolitan areas, to say that they had considered or changed to a cheaper service (15% selecting this impact, compared to 9%). This could in part reflect the shortage of services available to families in regional areas limiting their ability to switch to a cheaper service.



QUALITATIVE FINDINGS – IMPACTS OF ECONOMIC CONDITIONS ON ECEC USE

A key topic of interest for the qualitative research was how the current economic climate of inflation and rising interest rates has been impacting families decisions about work and education and care. Parents in the qualitative discussions reported being increasingly concerned about household finances and considering changes to working arrangements that would have flow on effects on their use of education and care. Reflecting findings from the quantitative survey, changes parents were considering (though few had enacted these yet at the time of the discussions) included:

- returning to work sooner than planned after having a baby/caring for children at home
- working more and therefore needing to increase use of education and care
- reducing the amount of money being spent on long day care by:
 - shifting to free/subsidised preschool/kinder where possible, as soon as possible. For example some in Victoria were looking at shifting out of long day care and into 3- year-old sessional kinder
 - increasing use of informal care options such as grandparents and other family
 - changing work arrangements (changing jobs, hours in work or which partner is working) in order to care for children more at home or to be able to drop off and pick up around sessional pre-school/kinder hours.

ECEC professionals participating in this research observed that the recent cost of living pressures have impacted the amount of care and education parents seek for their child.

“With inflation happening, I have seen some who can’t afford it, and have had to take their children out, and then some who need a job so desperately that they have to have their child in every single day so they can work.”

ECEC TEACHER



IMPACT OF CHANGES TO CCS ON USERS OF ECEC

All participants in the main survey and the follow-up poll were provided with a brief description of the CCS and informed that, under changes made in July 2023*, most families using paid childcare should now be getting more subsidy, and some previously ineligible families should now be eligible for the subsidy.

Three quarters of parents in the main survey (74%) indicated that they were aware of these changes to CCS. In the follow-up poll, taken three months later in October, this awareness figure had dropped to 69%.

Among parents aware of the changes to CCS and currently using ECEC:

- in the main survey, 42% said they had noticed that they were now paying less overall for the services their children use. This figure was almost the same, at 43%, in the follow-up poll three months later.
- in the main survey, 5% had increased the number of hours or days which their children are in care in response to changes to CCS which had at that time only recently come into effect. By three months later, in the follow up poll, this figure had increased significantly to 14%.
- in the main survey, 61% perceived that the service/s they use had raised their fees since the changes to CCS came into effect. This figure had dropped significantly to 52% in the follow up poll taken three months later.

By the time of the follow-up poll in October 2023, 52% of parents who were aware of changes to CCS and using ECEC appeared to have obtained some net benefit of the CCS changes, in that they noticed they were paying less now overall for their services and/or they had been able to increase the amount of ECEC they use, as a result of the changes.

Even among parents who reported an increase in fees at their ECEC service, 33% in the main survey and 29% in the follow up poll reported they were still paying less overall for the services their children use since changes to CCS came into effect. For the remainder, however, it appears that the intended benefit of the CCS changes may have been negated by fee increases, potentially leaving families with the perception that the CCS changes have no impact or a negative impact on their ECEC fees.

In the relatively short period between the changes to CCS coming into effect and fielding of the survey, 5% of parents aware of the changes and currently accessing ECEC said that they had increased the number of hours or days which their children are in care in response to changes to CCS.

In the main survey, households on lower incomes were more likely to increase their hours or days in care. Those with an annual household income of less than \$121,000 were most likely to say they had increased hours/days in response to changes to CCS (9%) and those with a household income in excess of \$255,000 least likely to say they had done this (just 2%). This income-based difference was less pronounced in the follow-up poll, with 10% of those with an annual household income of less than \$121,000 having increased hours/days in response to changes to CCS, compared with 7% with a household income in excess of \$255,000.

* The CCS changes came into effect on 10 July 2023, two weeks before the main survey was in field.

QUALITATIVE FINDINGS – CHANGES TO CCS

Qualitative discussions with parents for this research were held in June, prior to the implementation of changes to CCS, and at that stage many were broadly aware that changes were coming. Most understood the intention of the changes was to improve the affordability of ECEC for families. However, relatively few in the parents' discussions were aware of the exact detail of the changes or had considered how the changes would personally impact them.

Those who were using long day care tended to be more aware of the changes than others and there was a sense that parents were generally grateful for them. However, some assumed the changes would only marginally impact the fees they were paying. There were reports by some in Victoria that the cost of childcare for their family had substantially decreased in the last 12 months irrespective of these changes.

Some parents thought that they would consider increasing the numbers of days their children were in formal care if the CCS changes amounted to a reasonable discount for them. However, they also commented that their ability to do this would depend on places being available, as they assumed that if care becomes more affordable, finding a place or increasing days would become more difficult.

While most of the ways in which CCS was changing were welcomed by parents once the changes were described to them (the increased subsidy for a second child), changes to eligible income limits did surprise parents. Many were shocked that the upper income limit was increasing to \$530,000, questioning whether households who earned this much really needed government support for ECEC fees. The view among these parents was that it would be better to focus on increasing affordability for low-medium income households, or strategies to increase the number of places available to families in areas with high demand/low vacancy.

Narrative interviews were conducted after the changes to CCS were implemented and two parents in these interviews reported their long day care services had absorbed the CCS increases into fees, so they were paying the same amount as before. One parent reported their centre had introduced additional perks in lieu of this, such as the ability to use paid days of care lost to public holidays on another weekday. This parent felt this would be reasonable if the centre was using the subsidy that should be going to parents to pay workers more, though they did not know if this was the case.



CHANGES TO PRESCHOOL/KINDER

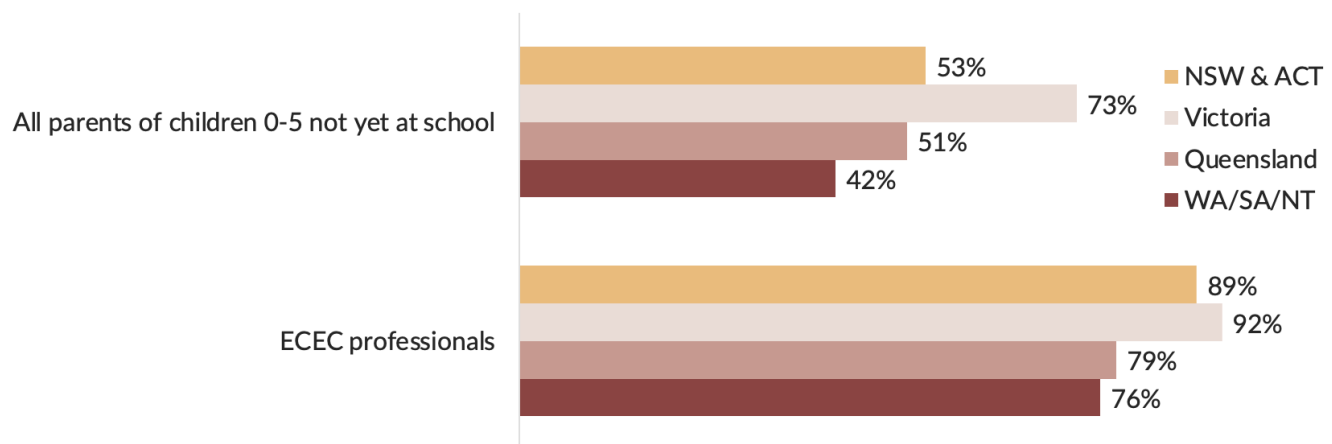
Survey participants were provided with a brief description of changes being made to preschool/kinder by some state and territory governments across Australia. These included:

- moving towards a universal preschool program, where all 4-year-olds will have access to 5 days a week of subsidised preschool/kinder in the year before school by 2032.
- increasing the number of subsidised hours per week of preschool/kinder that 4-year-olds can access in the year before school.
- opening up subsidised preschool/kinder places to 3-year-olds.
- building more preschools/kindergartens.

Just over half of parents surveyed (56%) and just over three quarters of ECEC professionals surveyed (78%) were aware of at least one of the four changes to preschool/kinder shown in the main survey.

As shown in Figure 6, awareness of any of these changes was highest in Victoria (where most of these changes are in the process of being implemented), with 73% of parents and 92% of ECEC professionals living in this state aware of at least one of the four changes asked about. Awareness of changes was also high in NSW/ACT (where some of these changes have also been announced) among ECEC professionals, with 89% of this audience being aware of any of these changes.

Figure 6. Awareness of changes to preschool/kinder, by main survey audience and state/territory*



Question: Several state governments across Australia have been making changes to preschool/kinder (the education services available for children in the year/s immediately before they start primary school). The specific changes differ across states. Which, if any, of these following changes have you heard about anywhere in Australia before today? Base: all parents of children 0-5 not yet at school (n=1,000); ECEC professionals (n=147)

* The sample size of ECEC professionals in Queensland was very low at just n=14, meaning caution should be taken when interpreting results for this audience. Results for Western Australia, South Australia and the Northern Territory have been rolled together because of small sample sizes.

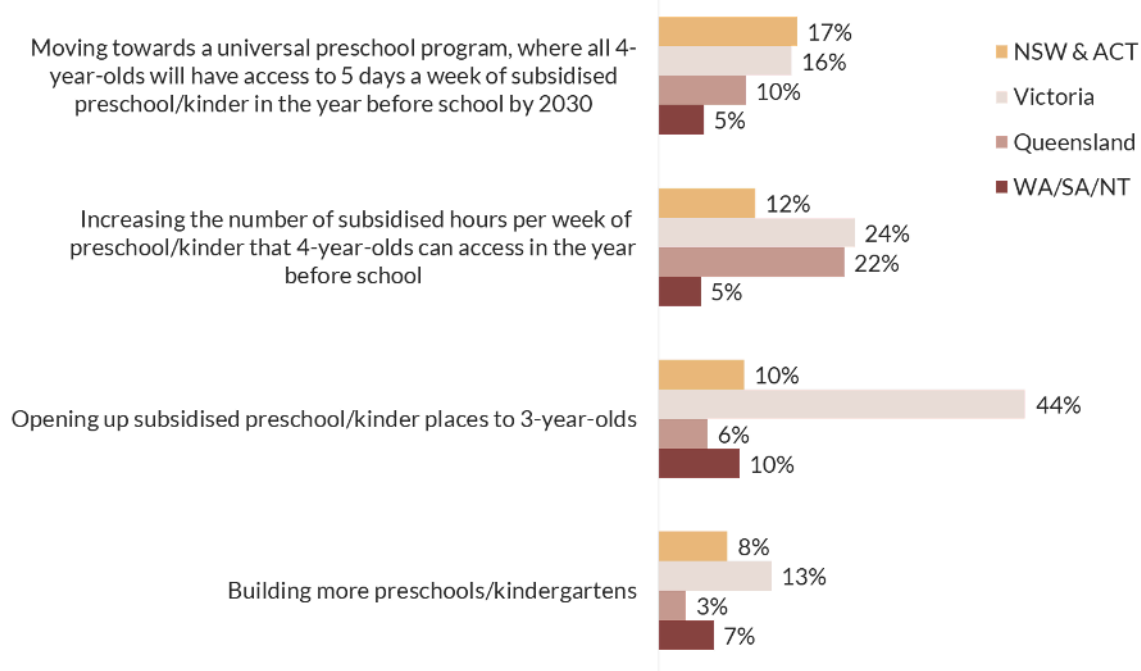
Survey participants who were aware of any of the changes to preschool/kinder mentioned in the main survey were asked to specify whether or not they thought those changes were occurring in the state/territory where they live.

Figure 7 shows levels of awareness among parents of children aged 0-5 years not yet at school* that changes such as these are occurring in their own state/territory. Regarding each of the changes:

- Awareness of the move towards a **universal preschool program for 4-years-olds by 2032**, which is a policy announcement from state governments in both NSW and Victoria, was relatively low in these states: just 17% and 16% of parents in these states who are aware of this policy know that it is occurring in their state. Having said this, awareness in these states is significantly higher than among participants in other states, with more than one in ten aware of this policy mistakenly believing it is occurring in their own state.
- Policies to **increase the number of subsidised hours per week of preschool that 4-year-olds can access** in the year before school is highest in Victoria and Queensland, where policies of this nature have been announced, with 24% and 22% of parents in these states who are aware of such a policy knowing it applies to their state.
- **Opening subsidised preschool/kinder places to 3-year-olds** is a policy in NSW, ACT and Victoria, and, at the time of the data collection phase for this report, a Royal Commission in SA was looking at what a universal 3-year-old preschool program could look like in that state. The fact that implementation of this policy is more advanced in Victoria is reflected in the survey results, with Victorian parents aware of this policy being far more likely than parents in other states to know this is occurring where they live (44%, compared with no more than 10% in other states and territories).
- The Victorian Government has committed to **building more preschools/kinders** and the NSW Government has increased funding to childcare centres to encourage more services to open in areas with high demand for services. Victorian parents aware of this policy are more likely than those in other states to know it is happening in their home state (13%, compared with 3-8% in other locations).

* The number of ECEC professionals interviewed was not large enough to report equivalent (state/territory-based) findings for this audience.



Figure 7. Awareness among parents of individual changes to preschool/kinder, by state/territory

Question: If any selected at 2.3: And to the best of your knowledge, which, if any, of these changes are occurring in the state/territory where you live? Base: all parents of children 0-5 not yet at school (N=1,000).

Among parents who are both aware of changes to preschool/kinder and believe these to be occurring in their own state/territory (n=438), just 12% indicated that such changes have already factored into decisions they have made about education and care for their children aged 0-5 years and not yet at school.



QUALITATIVE FINDINGS – CHANGES TO 3 AND 4-YEAR-OLD KINDER

The qualitative research revealed mixed awareness among parents in NSW, Victoria, Queensland and South Australia of broad reforms to 3- and 4-year-old preschool/kinder across the country, or of more specific changes to these services that have been announced or enacted in their own states. Policy announcements in these states were used to create a general description of changes that was read out in the group discussions and reactions to these changes were sought from the participants.

Parents in Victoria who had children attending sessional preschool/kinder were aware that the state government had introduced free kinder for 3-and-4-year-olds and were very much in favour of this change. Many using long day care were also aware of this change, but reported mixed experiences of how this policy has been implemented in their own centre. While some reported receiving rebates or fee reductions, others reported no change in their fees, stating their service was continuing to charge the same fees for children attending kinder programs as before or as for younger children (these parents believed or reported having been told that any savings to the centre were being absorbed to cover rising costs of delivering education and care).

"[My child just] does one day of childcare now. Most of the parents have sent their kids to sessional kinder – so they can meet more kids their age. The other reason we sent her to sessional kinder is because it's free. It runs from 8.30-4 two days a week. Last year she had two days of 5 hours... she did that on days when grandparents could help. Our younger daughter will do sessional 3-year-old kinder two days, and childcare one day."

PARENT OF 0-5-YEAR-OLD

Many parents whose children were attending preschool programs within a long day care setting (not just in Victoria, but in other states as well) felt they did not have a clear idea of what this program covers, nor how it differs from what children do outside of/prior to the preschool program.

Parents in the qualitative research voiced several questions and concerns about the move towards universal preschool programs for 4-year-olds, being rolled out over time in Victoria and NSW and currently being considered in SA. These included:

- Concerns that attendance may be compulsory – many felt that children aged up to five years do not have the energy and attention span to attend a school-like setting five days a week. If there is a choice, those whose circumstances allow indicated they would not choose for their child to attend preschool/kinder for five full days a week for the whole year prior to school starting. Few who currently work part time or not at all felt this change would result in them working more.
- Questions around the intended benefit to children of what would essentially become an additional year of formal schooling. There was a lack of awareness that some children currently enter school lacking skills to succeed.
- Concerns that these changes will increase demands on an already strained system. Parents perceive there are already not enough ECEC places and teachers.
- Questions regarding fees/subsidies and how these will be applied in the private long day care vs sessional preschool/kinder setting. Parents wondered if those who attended preschool in a long day care setting would have to pay full fees while sessional kindergartens would be free. This could result in a large and unfair difference in affordability between settings over a 5-day a week attendance. Some felt this could result in a large shift of children from long day care to sessional preschools/kinder where available.

QUALITATIVE FINDINGS – CHANGES TO 3 AND 4-YEAR-OLD KINDER

Some ECEC professionals in the qualitative research were well aware of imminent changes to preschool/ kinder in their state and were largely supportive of the changes, seeing it as of benefit to children and families alike.

"I think kindy in the year before school, 5 days a week, is an amazing initiative. It would be helpful if it's play based. And I think, yeah, I think the schools will notice a big knock-on effect from that, because children will have those skills and resilience before they go to school. "

ECEC TEACHER

"I think it will encourage more people, especially females to go back to work."

ECEC TEACHER

"Because of the new kindergarten funding we actually had quite a few families enrol in more days, because now they can afford to send them more. You know, with the social and educational background of the parents, children can benefit more coming to the service than staying home, because if I ask them what they've been doing, they've been watching YouTube all day. They will get a lot more benefit from coming to a centre so the increase in subsidy can really have a very positive impact on parents and children as well."

ECEC EDUCATOR

Some, however, were concerned about the ability to staff the changes, given existing staffing challenges and attrition from the sector.

"I'm a little bit concerned about staffing, because even nowadays we barely have enough staff. So I hope that if there is gonna be more childcare centres opening. There's gonna need to be more educators or teachers willing to work, or educators and teachers that are already working in the industry would stay in the industry, not just leave."

ECEC EDUCATOR

"How does it work on the ground? Where are they going to find the teachers?"

ECEC TEACHER

This concern extended not just to educators and teachers on the floor, but also to the shortage of senior, experienced teachers who can provide on-the-job mentorship and oversight. ECEC professionals did not see this problem as being solved only by increasing students entering and completing education and training, but by addressing systemic issues that are leading to attrition in the first place.

"A lot of burnout happens. Before when I was teaching kindy at a long day care centre, I just had to accrue annual leave, and it was like 4 weeks a year, and it's not enough. You know, we need time to regulate ourselves just as we do with the children, and come back to work feeling motivated with fresh ideas."

ECEC TEACHER

BELIEFS AND NARRATIVES

The qualitative and quantitative research components explored the beliefs held by parents and ECEC professionals about:

- early childhood development
- the ECEC system and its different services
- teachers' and educators' roles within ECEC services.

Facilitators in the qualitative research sessions listened closely to the language used and the narratives emerging when participants discussed these topics. These findings were used to craft a set of 16 statements which were included in the main quantitative survey. Parents and professionals completing the survey were asked to indicate the extent to which they agreed with these statements. These survey findings and associated insights from the qualitative research are reported under the following sub-sections.

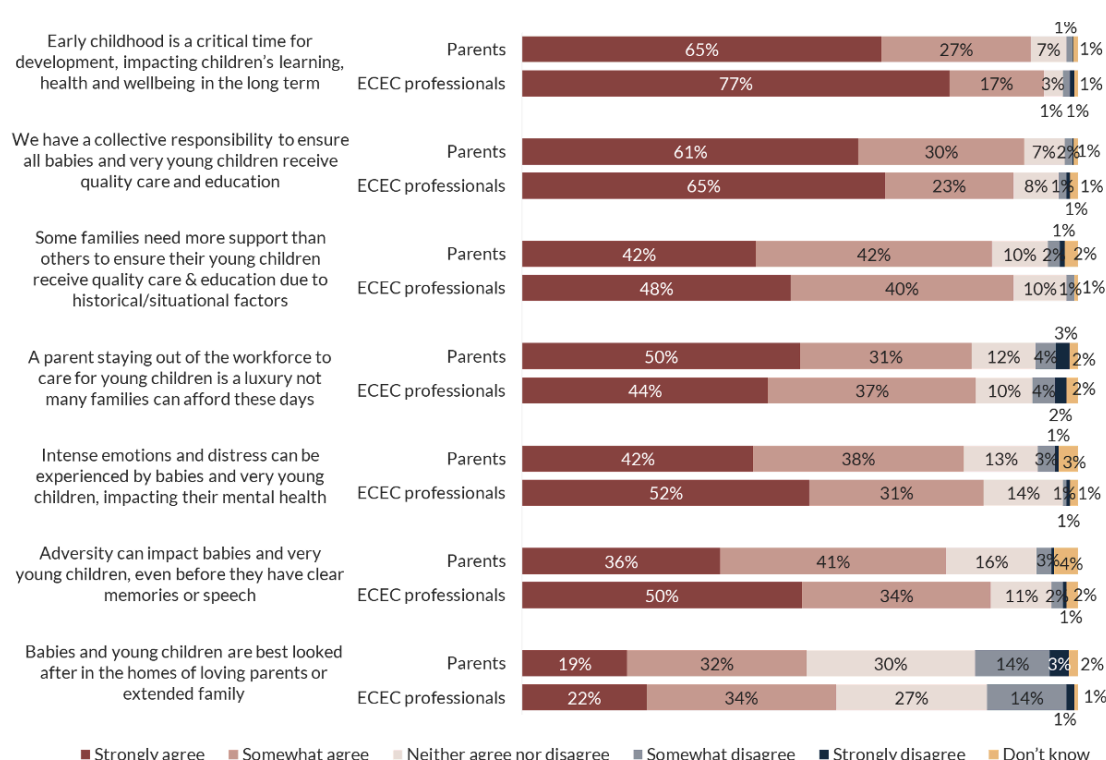
NARRATIVES ABOUT EARLY CHILDHOOD DEVELOPMENT

As shown in Figure 8, there was widespread recognition among both parents and ECEC professionals that early childhood is a critical time for development, impacting a child's learning, health and wellbeing long term. Almost all parents and professionals surveyed agreed with this idea overall (92% of parents and 94% of ECEC professionals either strongly or somewhat agreed), with a majority in each audience expressing strong agreement (65% and 77%, respectively).

A clear majority of both audiences (90% of parents and 88% of ECEC professionals) also either strongly or somewhat agreed that we have a collective responsibility to ensure all young children receive quality care and education.

While roughly half of parents (51%) and slightly more ECEC professionals (56%) agreed (although most commonly only somewhat) that babies and very young children are best looked after by family at home, the large majority of both audiences (81% of parents and 82% of ECEC professionals) agreed that a parent staying out of the workforce for this purpose is a luxury not many can afford.

Figure 8 Narratives about early childhood development



Question: To what extent do you agree or disagree with the following statements? Base: All parents of children 0-5 not yet at school (N=1,000); ECEC professionals (n=147)

QUALITATIVE FINDINGS - NARRATIVES ABOUT EARLY CHILDHOOD DEVELOPMENT

Parents in the qualitative research varied in the extent to which they have considered or feel they understand early childhood development, in the sense of what experts say about this period or process. Nevertheless, all parents expressed the belief that early childhood (which most take to mean the ages of 0-5 years) is a critical time for children's development.

Parents generally believe that the period from birth to 5 years is characterised by rapid growth and change and children's developmental needs change over this time. Parents believe therefore that babies and young children need enrichment and wide range of sensory experiences for healthy development over this time, that match their needs and capacity at different stages.

Parents revealed strong feelings that babies' best first carer and teacher is their mother and that the best place for children aged under 3 years to spend most of their time is with their family, with some regular opportunities for enrichment outside of the home.

Alongside this are beliefs that parenting is gruelling and, to be able to do their best, parents sometimes need a break. Parents also have to work, and parents commonly believe that two incomes is essential these days for families to be able to meet needs and financial obligations, so some form of care is necessarily unavoidable. If they're lucky, grandparents and other family members can step into help. Parents tend to believe that one parent staying at home is a luxury few families can afford these days and that if one parent chooses to stay out of the workforce, they are either very well off or making a large financial sacrifice.

ECEC teachers and educators in the qualitative research had mixed views about ECEC and child development, with universal valuing of the importance of the setting young children are in and an appreciation of the role ECEC plays in supporting the development of the whole child.

"Early childhood development affects their future because they're absorbing like a sponge. They learn a lot of things from their surroundings, like through receptive language used and how adults treat them."

ECEC EDUCATOR

Others believed that, particularly for younger children under two years, their place is with family. These beliefs appeared to be influenced by cultural factors.

"Where we come from, once the baby is born, they're not going to an early childhood setting at all. They're being taken care of by mum, or if they're working it would be a grandma or neighbours or families."

ECEC EDUCATOR

Professionals working in all types of settings, and as both educators and teachers broadly agreed that for young children, and the ECEC staff who care for and educate them, attending day care for long days, five days a week is not ideal. Some spoke of the emotional load that they carry that impacts their capacity to be present and to remain working in the field.

"Sometimes I go home like feeling, not physically tired, but mentally drained. I just feel my emotions. I'm taking on too much emotion at work."

ECEC TEACHER

NARRATIVES ABOUT ECEC

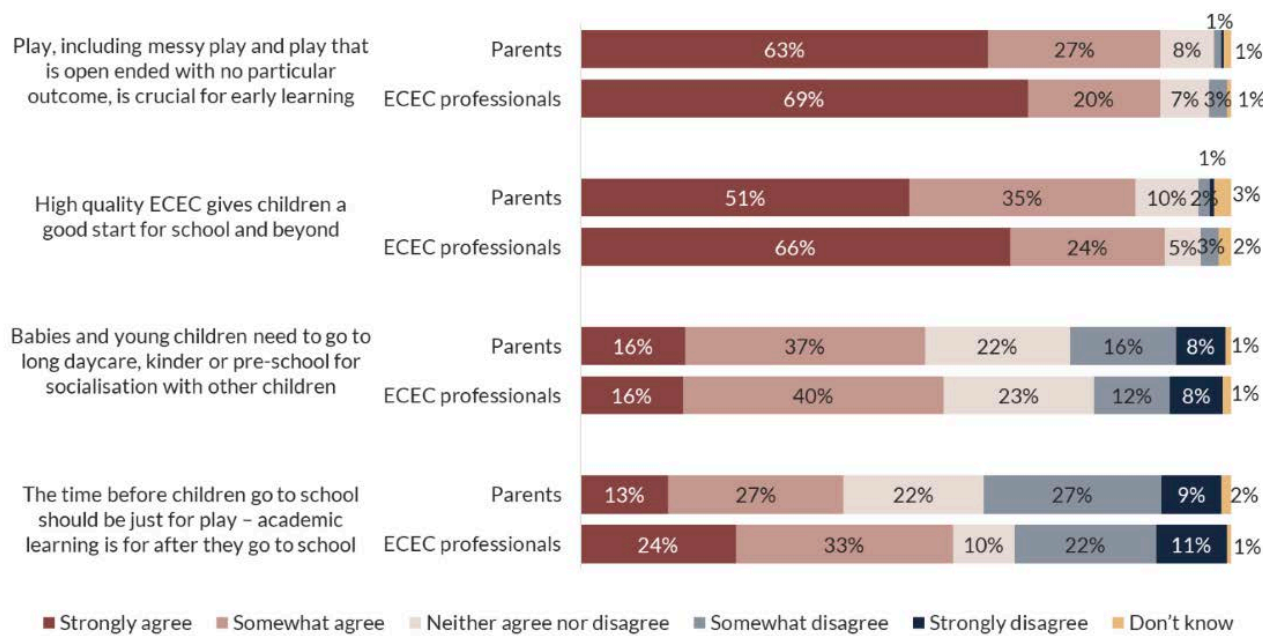
In similar findings to the 2021 Work and Play study, a large majority of parents (85%) agreed that ‘high quality ECEC gives children a good start for school and beyond’. This proportion was even higher among ECEC professionals, with 90% of this audience agreeing overall (66% of these indicated strong agreement).

Both audiences were of the view that play, including messy and open-ended play, is particularly crucial for early learning, with a majority of ECEC professionals (although not parents) believing that the time before children go to school should be just for play. More detail is provided in Figure 9.

Views on the importance of ECEC for child socialisation were more mixed, although slightly more than half of each audience (53% of parents and 56% of ECEC professionals) still agreed that babies and young children need to access ECEC for socialisation with other children.

Figure 9 Narratives about ECEC

Figure 9 Narratives about ECEC



Question: To what extend do you agree or disagree with the following statements?

Parents identifying as being a stay-at-home parent on home duties, were significantly less likely than other parents to agree that high quality ECEC gives children a good start for school and beyond (81% compared to 88% of other parents), and more likely than other parents to be ‘on the fence’ neither agreeing nor disagreeing with this (17%, compared to 9% of other parents). Appreciation of the value of high quality ECEC held relatively constant across other parental demographic groups.

QUALITATIVE FINDINGS - NARRATIVES ABOUT ECEC

The qualitative research revealed most parents believe that, from around 3-5 years of age, children have an increasing need for 'socialisation' and some instruction in literacy, numeracy and skills that will enable school readiness. Many also believe that this is best developed in a formal setting, though a small number feel that children should just be children and focus on unstructured play until school begins. Many parents do believe that play is educative, and some are familiar with the concept of 'play based learning'.

The term 'Early childhood education and care' was rarely used spontaneously by parents in the qualitative research, and the acronym 'ECEC' was not familiar to them when asked. On prompting, parents imagined that the term encompasses an array of formal care and early learning options available to families – mentioning long day care and early learning centres, council run kindergartens, family day care and nannies. Parents in the qualitative research tended to use the term 'childcare' or 'day care' to refer to long day care and the terms 'preschool', 'kindergarten' or 'kinder' or 'pre-K' to refer to sessional preschools and kindergartens.

Parents in the qualitative research expressed a belief that that the ECEC system is quite good in Australia, compared to other countries, but that the quality of care is highly variable across settings and locations. Prior to their own experiences with the system, parents had heard that access to quality care can be difficult and some feel that other countries do better to ensure equal access to all (for example Sweden, where childcare is believed to be free for everyone). Many believe that affordability of childcare is increasing, thanks to changes to government subsidies, however some also believe that this has increased demand and made it even harder for families to get a place.

Parents in the qualitative research revealed a range of beliefs and narratives held about different ECEC settings. Many of these beliefs were shared by professionals working in the sector:

- **Long day care** – beliefs about this setting include:
 - Mainly benefits parents that have to work full time.
 - Centres are imagined as large, crowded and children spend most of their time indoors.
 - More focused on care than education, programs are largely unstructured.
 - Preschool programs in this setting aren't the same as / are less educational than those delivered in sessional preschools/kinders.

"A lot of times when they're in a kindy room in a child care, even though you've got an educator there who's running a kindy program, a lot of the kindy kids are bored because they've been in that room sometimes for 2 or 3 years, and they're getting the same experiences as the others, and they've already done those. And then don't have that, you know, level of extension."

ECEC TEACHER

- Children pick up a lot of germs in this setting, meaning parents have to miss a lot of work.
- Money is wasted having to pay for days a child doesn't attend.
- Private centres profit driven, less interested in the children and their development.
- Staff-child ratios are too low – staff can't get to know the children, cater to their interests, or ensure that needs of individual children (including children with disabilities) are met.
- Competencies of staff are highly varied: some are passionate, but for others working in this setting, 'it's just a job'.
- Most of the people working in this setting are poorly paid and have certificate level qualification.

QUALITATIVE FINDINGS - NARRATIVES ABOUT ECEC

- **Sessional kinder/preschool** - beliefs about this setting include:

- Children love attending as they feel more independent (managing own lunchbox is mentioned by many as a sign of independence).
- Has a focus on delivering high quality education, as opposed to 'childcare'. It's seen as an extension of the school system – and prepares kids well for entry to school.

“Not for profit, is more quality. More focus on the children. The ones who go to day care don't seem to have had those same rich experiences.”

ECEC TEACHER

- It is more affordable than day care.
 - The learning environment is quieter, less crowded, and more organised/controlled than day care. Offers natural light and access to outdoor play and learning areas.
 - Workers in this setting are 'teachers' and 'teaching assistants' and they put more effort into getting to know each child and their family and building a sense of community.
 - Parents tend to be more 'hands on' and get to know each other better than at day care.
 - It runs during school hours and sometimes partial days, which exclude families who can't or lack support to pick up and drop off at these times.
 - Parents who have lived in different states believe access to these services can be limited in some areas and in some states and territories compared to others (with different systems operating in different states).
- **Family day care** – beliefs about this setting include:
 - Small groups of children are cared for in someone's home.
 - It does not deliver educational programs, mainly just unstructured play - more like 'babysitting'.
 - It is less regulated than day care - carers work alone so they could easily get away with poor conduct, poor quality care.
 - Carers can develop close, stable bonds with small children and meet individual needs than in other settings.
 - It offers fewer opportunities for children to experience diversity and socialise with other children.
 - It may be more suitable for babies and toddlers than those aged 3-5 years.
 - Carers may not have formal qualifications.

QUALITATIVE FINDINGS - NARRATIVES ABOUT ECEC

It was apparent in the qualitative research that parents' beliefs about early childhood development also interact with setting-based narratives outlined above to produce narratives around which types of care and education are 'best' for children at different stages of their young lives. Over the course of the discussions the following 'stories' emerged:

- For **babies** (aged under or around 1 year old), safe and secure attachment is perceived as paramount, so therefore care provided exclusively by a parent and, failing that, another close relative, is viewed as the most appropriate approach. At this stage, if ECEC is used, it is typically seen as an unavoidable necessity, possibly detrimental if used extensively, and parents agonise over choices and express guilt when talking about using ECEC at this stage of their babies' life. Parents and professionals express sympathy when talking about other parents who 'need to' use ECEC when their children are babies, and some question these parents' priorities. The unconscious motivation appears therefore to be to avoid formal ECEC for as long as possible at this stage.
- **Toddlers** are perceived to still need safe and secure care, but they are also believed to need increasing and varied stimulation, enriching experiences and socialisation. Narratives about toddlers begin to include beliefs that it is difficult for one person or a home environment to meet all of a toddler's needs, that parents of toddlers need time away from them to meet their own individual needs and to be a good parent and that the reality of society these days is that two parents need to work. At this stage, if long day care is used, it is more typically described as benefitting or meeting a child's specific need, such as language development, socialisation, stimulation and access to experiences they would not get at home like messy play. Narratives about toddlers using ECEC still include a suggestion that full time attendance at day care may be more detrimental than beneficial. Parents still express feelings of guilt about using ECEC at this stage, but guilty feelings are more commonly associated with the question of whether or not they are successfully managing the juggle of meeting the competing needs of work and family. This means that family day care is seen as less beneficial for toddlers than babies, and some attendance at day care seen as suitable for some, but not all, toddlers depending on their needs and personality.
- From **3-5 years of age**, it is perceived that children need to be 'readied' for school. Common narratives about children of these ages include that they need access to opportunities to learn independence and other skills to enable a smooth transition to school and that children who have no experience with ECEC may struggle when they get to school, particularly in terms of attention span, following rules and getting along with others. Pre-school is seen as the appropriate setting to develop these skills. Parents express little to no guilt about sending their children to sessional pre-school/kinder, though they may have beliefs around how many days are optimal for children of 3, 4 and 5 years, in terms of their attention and energy levels. Because long day care is perceived to be more care-oriented, preschool programs delivered in these settings are undervalued compared to those provided in community or school settings.

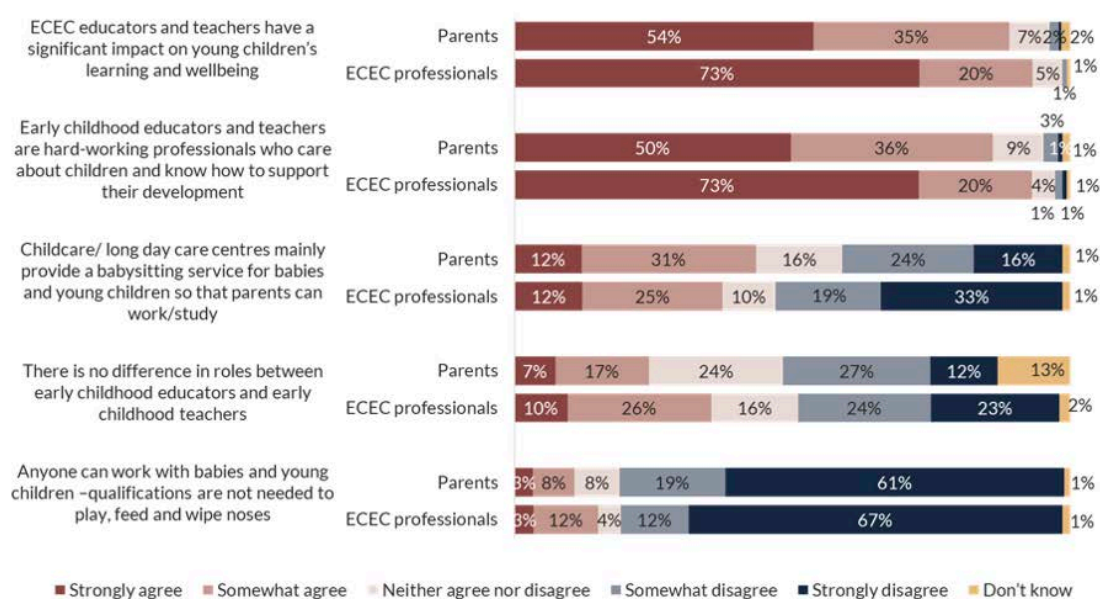
NARRATIVES ABOUT ECEC PROFESSIONALS AND THEIR ROLES

As shown in Figure 10, there was widespread recognition among both parents and ECEC professionals in the main survey that ECEC educators and teachers have a significant impact on the learning and wellbeing of those they work with. Just under nine in ten parents (89%) and just over nine in ten ECEC professionals (93%) agreed with this idea. This question was also asked in the 2021 Work and Play study in 2021, where the corresponding proportion of parents agreeing was significantly lower, at 83%.

This said, only 54% of parents (compared to 73% of ECEC professionals) 'strongly' agreed with this notion, and in a similar vein, 43% of parents (and even 37% of ECEC professionals) agreed that long day care centres, in particular, mainly provide a babysitting service.

Roughly a quarter of parents (24%) and a third (35%) of ECEC professionals did not see there to be a clear difference between the roles of early childhood educator and early childhood teacher.

Figure 10 Narratives about ECEC professionals and their roles



Question: To what extent do you agree or disagree with the following statements? Base: All parents of children 0-5 not yet at school (n=1,000); ECEC professionals (n=147)

Parents in NSW/ACT (31%) and Victoria (30%) were more likely than parents in other states to perceive there to be no difference in roles between early childhood educators and early childhood teachers (31% and 30%, respectively, compared to 19% of parents in Qld and 26% of parents in the less populous states/territories).

Parents who speak a language other than English at home were more likely than those who only speak English to perceive both that anyone can work with babies and young children, qualifications are not needed (15%, compared to 10%) and that long day care centres mainly provide a babysitting service (53%, compared to 42%).

QUALITATIVE FINDINGS - NARRATIVES AND BELIEFS ABOUT ECEC PROFESSIONALS AND THEIR ROLES

Parents participating in the qualitative research were asked if they had heard the term 'ECEC professionals'. None were familiar with this term and when prompted, it tended to conjure up images of staff working in the management of ECEC services or education departments.

When asked overall impressions of people delivering care and education in ECEC services, parents revealed a belief that they play a very important role in society, which asks a lot of them but provides little financial reward. It is believed that people working in ECEC roles should be there for the right reasons, but that working conditions and pay should also better reflect the important role they play, especially given low pay and poor conditions is seen to be directly related to poor service quality and high staff turnover in the sector.

Parents tended not to naturally use the terms 'Early Childhood Educators' or 'Early Childhood Teachers' when talking about the people working in these roles, and some had not heard these terms before, though most felt they understood what they mean. The qualitative research revealed the following beliefs and narratives about these roles:

- **Early Childhood Educators –**

- The term 'Educator' is associated with staff in long day care. Parents with experience of long day care sometimes spontaneously use this term to refer to those working with their children. Other parents tend more naturally to use the term 'childcare workers' when speaking about this role.
- Parents imagine people in these roles have some qualifications, perhaps at Certificate-level, but they are not assumed to have university degrees.
- The term 'Educator' tends to convey to parents a sense that they take a holistic approach to children's care and development. They are not believed to focus on 'teaching' specific subject matter or skills and parents think they probably lack the knowledge and qualifications to do this.

- **Early Childhood Teachers –**

- Teachers are more commonly associated with sessional preschool / kindergarten settings than long day care.
- Parents assume people in these roles will be university qualified, most likely in teaching. They assume therefore they are across curriculum requirements, modern teaching methods and child development and can set and implement preschool programs based on this knowledge and skill.
- Parents with experience of long day care are somewhat aware of degree qualified teachers in their service, but do not believe there to be many of them in that setting and are not able to confidently describe the difference between Teacher and Educator roles in the long day care setting. This is also the observation of professionals themselves.

"They don't really see the difference between teachers and educators."

ECEC TEACHER

"Children call everyone a teacher, so they don't see any difference. I don't think parents know. As long as the child is being nurtured and cared for, and they're happy, that's what matters to them. Rather than that piece of paper qualification."

ECEC EDUCATOR

QUALITATIVE FINDINGS - NARRATIVES AND BELIEFS ABOUT ECEC PROFESSIONALS AND THEIR ROLES

Professionals in the qualitative research reported experiencing mixed reactions to, and understanding of, their roles in ECEC. Those who had worked or had colleagues in long day care settings that offer a pre-school/kindy program observed that the distinctions between educator and teacher in this setting are particularly blurred.

"If you're in a long day care, you have to really prove yourself to the parents, and you have to fight every step of the way, like proactively campaign. I need to build my image with them. I need to build my professional connection with them so they can actually understand. Oh, yes, okay. She is a kindergarten teacher, but she's just in a long day care setting."

ECEC TEACHER

"Many, many parents still call it child care, and you know they just think of it as a part of childcare where we're still babysitting children, not where important learning is happening. Children and parents come whenever they want to, regardless of the set kindergarten hours. I've had to actually literally explain to the parents; can you please come at 9 o'clock? We're based inside a long day care but we're not babysitting. The ratio is one to eleven, so you need to start toilet training your child and teaching your child self care skills."

ECEC TEACHER

Some ECEC teachers who had worked in a long day care setting also experienced that this lack of understanding of or support for their role extended to centre management. They called for the need to educate management on the role of a teacher and how teachers need to be supported. This included a need for greater transparency about and input into how government funding for pre-school/kinder programs is spent.

"Kindy teachers to have direct access to government funding for resources. I don't know where all the money is going. You know we have money coming in, but there's not always money for us to see. I haven't even seen any of my kindy funding, and we're halfway through the year. And I keep asking, where is it?"

ECEC TEACHER

Comment was made by teachers and educators that perceptions of their profession are part of a broader issue of their profession not being appropriately acknowledged or appreciated.

"We can't expect people to appreciate our job. It comes with every job, like some people are sensible enough to say, 'Thank you'. But some really don't care. What can we do? Right?"

ECEC EDUCATOR

PERCEIVED BENEFITS OF ECEC

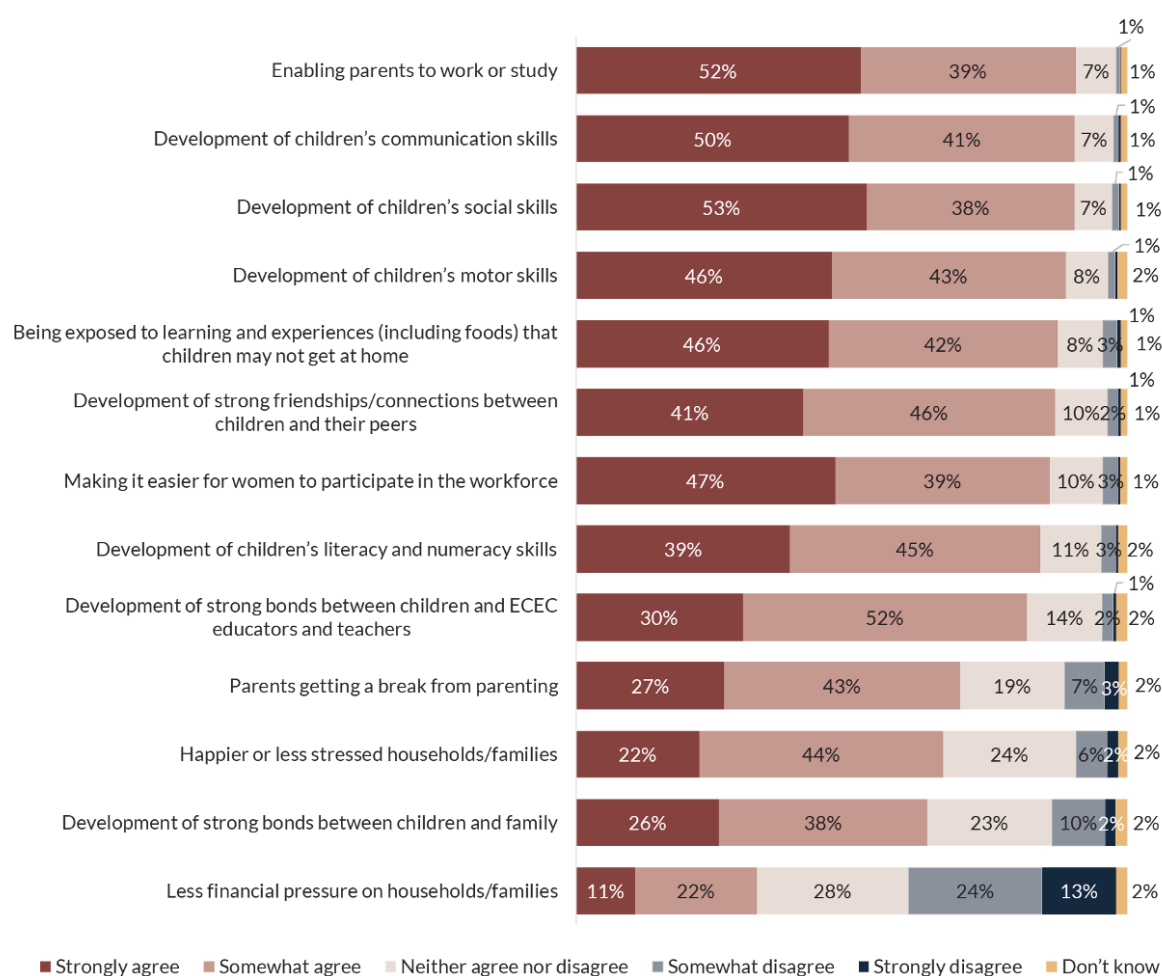
All main survey participants were presented with a list of 13 potential benefits of using ECEC, derived from previous research and themes emerging from the qualitative triad discussions. Survey participants were asked whether they agreed that ECEC delivers each of the benefits. Parents' responses to this question are presented in Figure 11, and responses from ECEC professionals are presented in Figure 12, with benefits ordered in each figure from most to least commonly selected.

As shown in these charts, parents and ECEC professionals strongly associate ECEC with providing a broad range of benefits to children and families.

ECEC benefits to child growth and development were recognised by many parents and ECEC professionals, particularly the development of children's communication, social and motor skills. Roughly nine in 10 parents and ECEC professionals agreed ECEC delivered these benefits, with as high as 95% of ECEC professionals indicating that participation in ECEC develops children's communication skills (see Figure 12).

Benefits of ECEC in supporting families were also widely recognised, particularly by parents. High proportions of parents agreed that ECEC delivers the benefits of enabling parents to work or study (91%), making it easier for women to participate in the workforce (86%), parents getting a break from parenting (70%) and happier or less stressed households/families (67%).

Figure 11 Benefits of ECEC perceived by parents

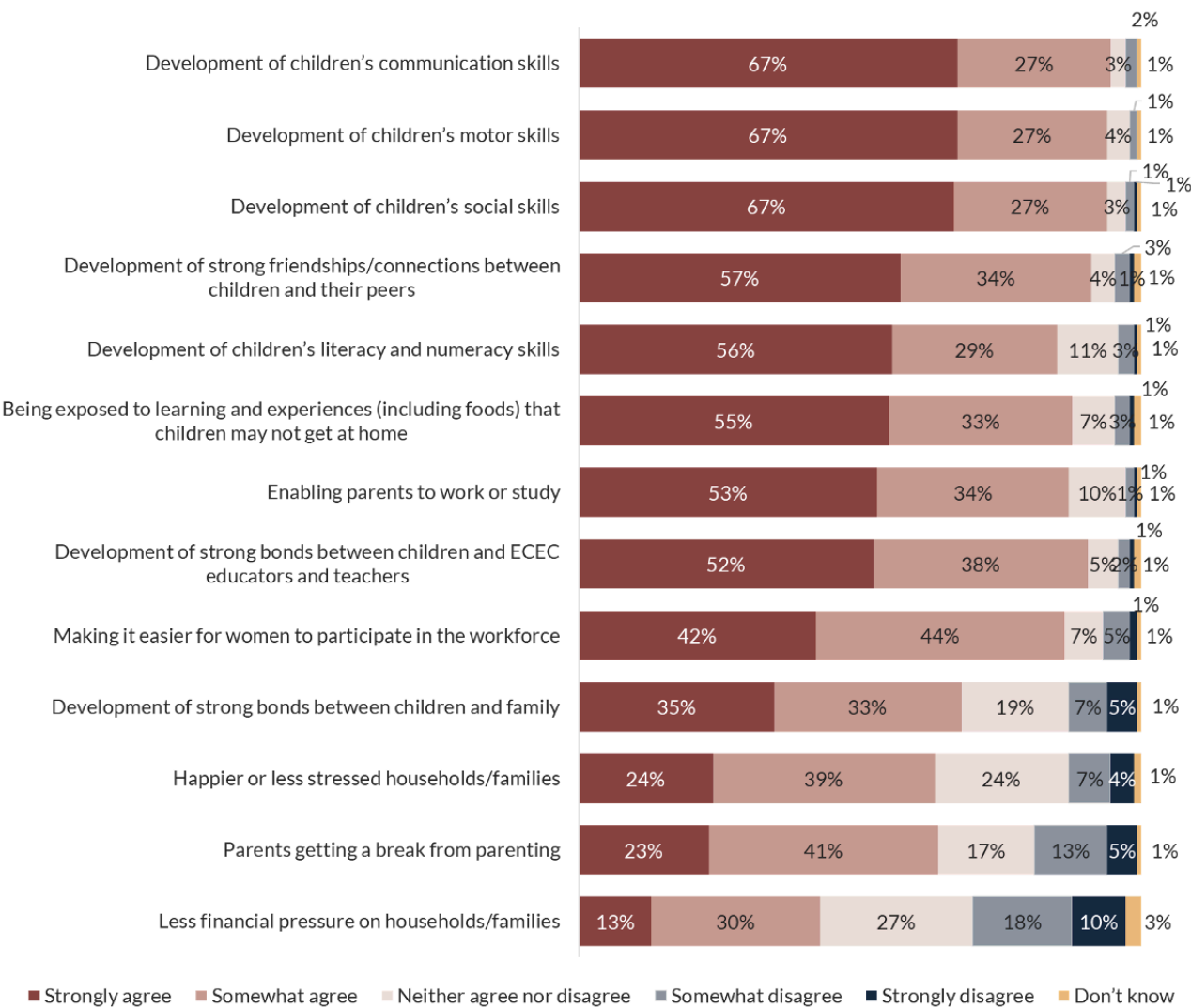


Question: To what extent do you agree or disagree that early childhood education and care (ECEC) delivers the following benefits? Note, ECEC includes long day care, sessional kinder/preschool, and family day care. Base: all parents of children 0-5 not yet at school (n=1,000)

Some differences were observed in the benefits parents perceive that ECEC delivers, according to age of child:

- Parents with a child under 12 months were more likely than other parents to see ECEC as delivering benefits involving the development of strong bonds between:
 - children and family – while roughly equal proportions of those with and without a child under 12 months agreed this was a benefit of ECEC, those with a child of this age were significantly more likely to strongly agree that this was a benefit (32% compared to 25%).
 - between children and ECEC educators and teachers – while roughly equal proportions of those with and without a child under 12 months agreed this was a benefit, those with a child of this age were significantly more likely to strongly agree (38% compared to 28%).
- Parents with a 2-year-old were significantly more likely than those without to see ECEC delivering the benefit of development of children’s communication skills. While roughly equal proportions of those with and without a 2-year-old agreed this was a benefit, those with a child of this age were significantly more likely to strongly agree (58% compared to 48%).
- Parents with a 5-year-old were significantly more likely than those without to see ECEC delivering the benefit of less financial pressure on households/families (45% compared to 31%).

Figure 12 Benefits of ECEC perceived by ECEC professionals



Question: To what extent do you agree or disagree that early childhood education and care (ECEC) delivers the following benefits? Note, ECEC includes long day care, sessional kinder/preschool, and family day care. Base: ECEC professionals (n=147).

QUALITATIVE FINDINGS - PERCEIVED BENEFITS OF ECEC

The majority of parents participating in the qualitative research perceived there to be many benefits to families and children using ECEC.

Those without experience of ECEC believed that these services provide children with opportunities to develop social skills and to be exposed to enriching experiences that may not be provided at home. Some perceive there may be additional benefits for vulnerable children in being able to access high quality ECEC, such as being able to develop strong bonds with guardians, having access to a wide range of stimulating play and learning resources and access to additional services such as speech pathology and nutritious meals.

Those with experience of ECEC could also point to unexpected benefits they did not consider when first deciding to use ECEC, which was also a finding in the 2021 Work and Play report. Anticipated benefits tended to include the benefit of parents being able to work, study or attend to other obligations and development of children's language and social skills. Unanticipated benefits tended to include exposure to a rich array of diverse experiences (including foods) that children do not get at home.

Parents in the qualitative research tended to associate different benefits with long day care and preschool kinder:

- **Long day care** was more associated with benefits to parents in being able to return to work, study or have time away from parenting, as well as providing children access to enriching play experiences (for example messy play), opportunities to socialise with peers, and access to healthy meals and toilet training support.
- **Preschool/kinder** was more associated with cognitive development, opportunities for personal growth through pursuit of tailored learning experiences, literacy and numeracy, supporting children's developing independence and sense of self and learning skills for success at school.

Professionals in the qualitative research were focused on the benefits of ECEC to children, rather than their families. Specifically, they perceived ECEC as being crucial for the development of social and emotional skills, self-regulatory capacity, attention and focus, as well as physical play and gross motor development. The benefits of ECEC for children had become even more apparent to professionals working both pre-and-post COVID as they observed first-hand the impacts of lower attendance across a whole cohort of children (see previous box Qualitative findings - the impact of the COVID-19 pandemic).



DRIVERS OF QUALITY

All main survey participants were presented with a list of 17 possible factors that could be drivers of quality in ECEC. The possible factors were derived from previous research and themes emerging from the qualitative triad discussions. Survey participants were asked to indicate how strongly each factor indicates the quality of an ECEC service. Parents' responses to this question are presented in Figure 13, and responses from ECEC professionals are presented in Figure 14, with factors ordered in each figure from most to least associated with quality.

Both parents and ECEC professionals considered 'the way in which staff members interact with children' as the strongest indicator of ECEC service quality, with 80% of parents and 79% of ECEC professionals indicating that this was an 'extremely strong' indicator of quality.

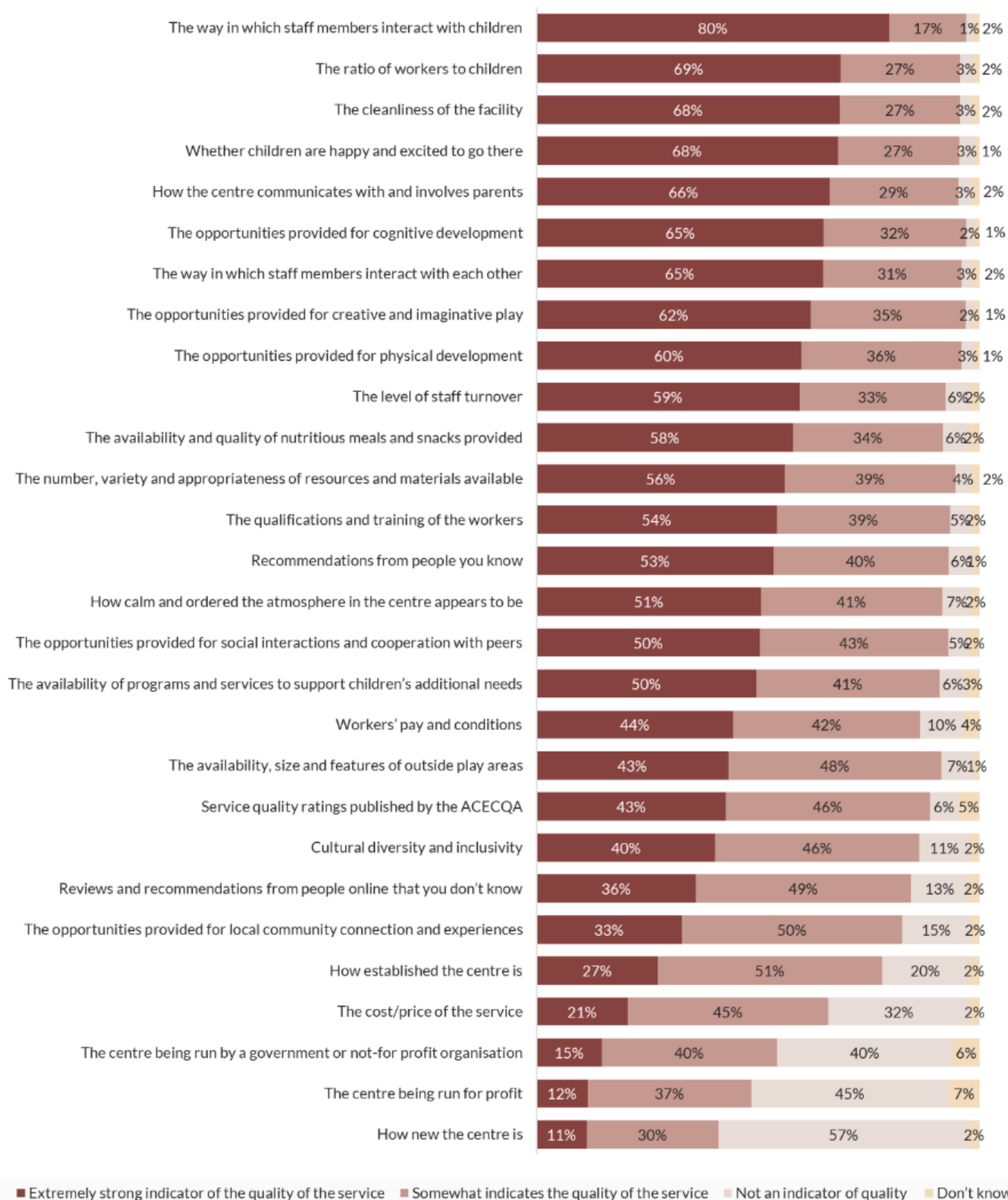
Other factors that at least two thirds of parents also believed to be 'extremely strong' indicators of quality included:

- the ratio of workers to children (69%)
- the cleanliness of the facility (68%)
- whether children are happy and excited to go there (68%)
- how the centre communicates with and involves parents about their child's progress and activities (66%).

ECEC professionals tended to recognise a wider range of factors as being strong indicators of quality and were more likely than parents to focus on developmental opportunities that are provided for children. Factors other than the way in which staff interact with children that at least two thirds of ECEC professionals believed to be 'extremely strong' indicators of quality included:

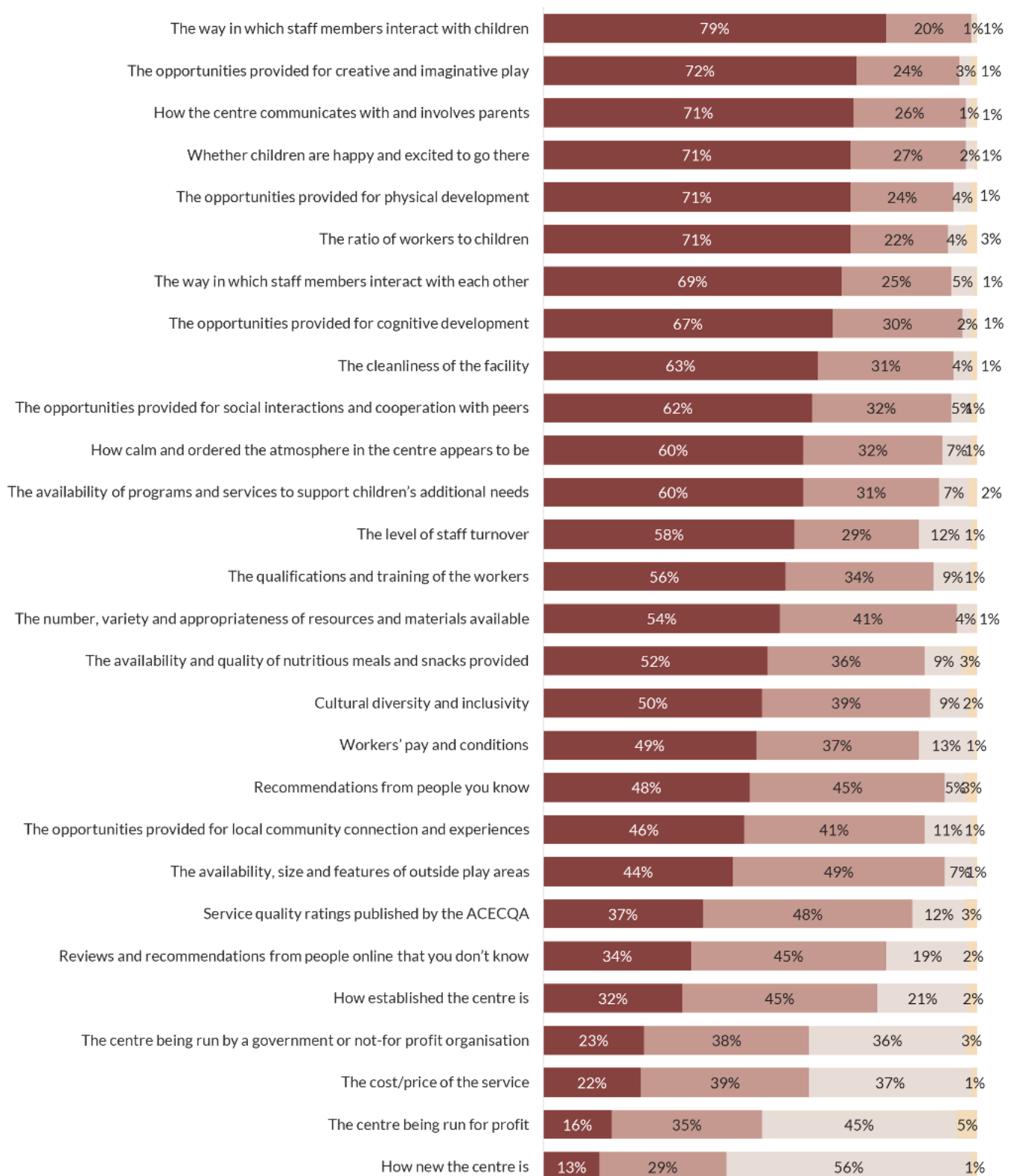
- the opportunities provided for creative and imaginative play (72%).
- how the centre communicates with and involves parents about their child's progress and activities (71%).
- whether children are happy and excited to go there (71%).
- the opportunities provided for physical development, such as gross motor activities and sports (71%).
- the ratio of workers to children (71%).
- the way in which staff members interact with each other (69%).
- the opportunities provided for cognitive development, such as activities that develop knowledge, skills and problem solving (67%).

As shown in Figures 13 and 14, 'how new the centre is' was the only factor consistently rejected as being an indicator of the quality of an ECEC service, with 57% of parents and 56% of ECEC professionals saying this is not an indicator of quality at all. The price charged for an ECEC service, and whether or not it is run for profit, tended also to be viewed as poor indicators of quality by both audiences.

Figure 13 Factors parents associate with the quality of an ECEC service

Question: How closely do you associate each of the following factors with the quality of an early childhood education and care (ECEC) service? In selecting your response to each, please consider whether you think this is something that parents should take into consideration to help them identify and select a high quality service, and/or that might have a strong impact on their child's positive experience and development if they attended a service with this feature. Base: all parents of children 0-5 not yet at school (n=1,000)

Figure 14 Factors ECEC professionals associate with the quality of an ECEC service



■ Extremely strong indicator of the quality of the service ■ Somewhat indicates the quality of the service ■ Not an indicator of quality ■ Don't know

Question: How closely do you associate each of the following factors with the quality of an early childhood education and care (ECEC) service? In selecting your response to each, please consider whether you think this is something that parents should take into consideration to help them identify and select a high quality service, and/or that might have a strong impact on their child's positive experience and development if they attended a service with this feature. Base: ECEC professionals (n=147).

QUALITATIVE FINDINGS - DRIVERS OF QUALITY

Parents in the qualitative research expressed a belief that the quality of ECEC is high relative to some other countries, but also varies across settings and locations in Australia. While quality in the sector is felt to be appropriately governed by regulation, parents also felt that the number and type of services available in different locations, as well as worker shortages and poor pay and working conditions across the sector, all exert pressures on the delivery of quality care and education.

When asked to describe what quality in ECEC means to them, parents struggled to define quality. They tended to describe observable features of an ECEC service that could indicate high quality, such as:

- positive interactions between staff and children, between staff members, and between ECEC management and employees
- low staff turnover and staff that seem happy to be there
- children who are generally happy to attend
- services adhering to standards and being accountable and responsive when things go wrong
- a safe, healthy, and clean centre
- a focus on understanding individual children and their needs
- genuine adherence to or exceeding staff to child ratios (some parents expressed concern about long day care services not meeting ratio requirements in practice within each room)
- for older children, a clear focus on growth, educational achievement and school readiness – through structured programs, incursions/excursions
- specific additional inclusions in the fee, mentioned by some, such as meals prepared on site, dinners and nappies being provided
- transparency around activities, staffing, fees and other issues affecting the operation of the service.

The qualitative research also revealed many parents who did not feel they had an opportunity to fully consider the quality of ECEC services they were anticipating using for their child before enrolment and some also reported having persevered with services even after being aware of or having experienced quality issues. Reasons given for this included:

- site visits not being possible/offered for long stretches during COVID (particularly in Victoria)
- site visits being so brief that parents were unable to get a sense of quality.
- not knowing what features to look for or what questions to ask to determine quality.
- lack of awareness, understanding or confidence in NQF ratings
- lack of experience with other services, so not knowing what benchmarks to apply.
- lack of choice – some parents are unable to base choices on expectations or experiences of quality because there are simply no other services available to them. That is, no other services can meet needs in terms of hours, days or other requirements, no places are available elsewhere or there is only one service in town.

QUALITATIVE FINDINGS - DRIVERS OF QUALITY

"Because it was during COVID, we weren't able to visit, they weren't doing tours. We did visit one and we had nothing to compare it with, so we weren't sure whether we should go there. But when I went for my second tour at another childcare, that director seemed a lot more approachable. So, we decided to go to that second childcare centre."

PARENT OF 0-5-YEAR-OLD

Professionals in the qualitative research offered a number of indicators of quality in ECEC:

- Relationships:
 - between staff and children, including level of engagement and presence
 - between management and staff
 - between staff and families
 - between children and other children

"Make sure that you see the educators down at the children's level and engaging. When you go to a centre, I always say trust your instincts, trust your gut if it doesn't feel right, it's not for you. If you go to a centre and it feels really warm and inviting, that's a really good sign that you're on the right track."

ECEC EDUCATOR

To see children playing together, not sort of engaged in solitary play, you know, little groups of children forming connections together, and educators leading the learning, so they're not just off doing their own thing."

ECEC TEACHER

- Environment, including outdoor space and enriching resources and equipment

"..outdoor areas that offer lots of alternatives, for climbing and outdoor play. An environment where they have to be resilient, that they have to make choices for themselves, that you know, they're going to definitely fail and learn from that. So an environment that promotes resilience and risk taking, not too comfortable and not too safe, but promotes that sort of healthy risk. They are definitely within eyesight and reach. But they're actually getting a little bit of freedom and autonomy."

ECEC TEACHER

- Pre-school/kindy programming

"Good programming plan for the kids. What do the children like? Catering for their ability, their developmental milestones and their interests."

ECEC TEACHER

- Staffing including good or higher than minimum ratio and low staff turnover
- Philosophy of the centre including continuous learning and mentoring for educators and teachers

DESIGNING THE SYSTEM TO BETTER MEET FAMILIES NEEDS

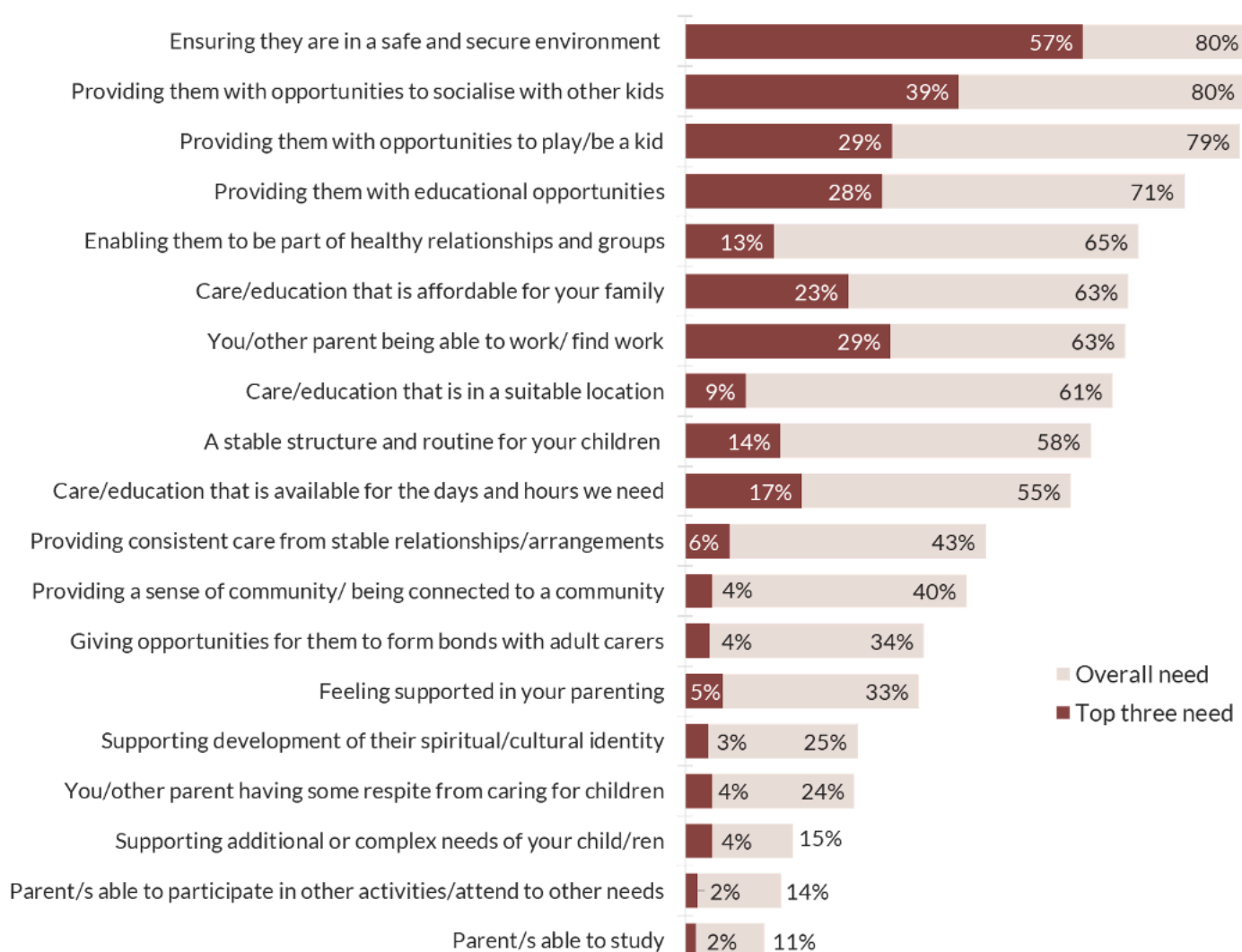
EDUCATION AND CARE NEEDS

The main survey presented parents with a list of 19 possible needs associated with young children's education and care, mirroring those used in the 2021 Work and Play study. This was included to enable an analysis of where the system is currently meeting needs and where it is falling short for families.

From the list of needs, parents were asked to select those most important to them when thinking about the care and education of their children. Following this, they were asked to identify their top three current needs from the list they selected. The findings from these two survey questions are shown in Figure 15.

Consistent with the 2021 Work and Play' study, the four most important needs for parents overall when it comes to the education and care of their 0–5-year-old children centred around the child's safety and security, and their growth through socialisation, education and play.

Figure 15 Needs associated with children's education and care (most important and top 3)



Question: When it comes to the care and education of your children aged 0-5 years who is/are not yet at primary school, which of these are important to you right now? Please select all that apply. Of these important needs, now please select the top 3 most important to you. Base: all parents of children 0-5 not yet at school (n=1,000).

Whether needs differed according to age of child was explored through statistical analysis. Parents with a child under 12 months tended to select more needs than parents without a child of this age, and were more likely than other parents to select as important to them right now:

- ensuring children are in a safe and secure environment (88% compared to 78%)
- providing children with opportunities to socialise with other kids (84% compared to 78%)
- providing them with education opportunities (78% compared to 69%)
- care/education that is affordable for our family (70% compared to 61%)
- care/education that is available for the days and hours we need (61% compared to 53%)
- providing consistent care from stable relationships/arrangements (51% compared to 40%).

Supporting a child's additional or complex needs was more likely to be selected as a need by parents of four- or five-year-olds (20% and 23%, respectively).

QUALITATIVE FINDINGS - EDUCATION & CARE NEEDS FOR 0-5 YEAR-OLDS

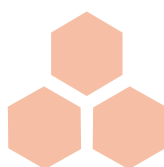
The findings from the 2021 Work and Play study indicated that education and care choices are guided by different needs at different stages of their child's development and this most recent qualitative research continues to support this finding. For the most part, though a broad range of needs are identified by parents of children 0-5 years, different needs strongly drive choices at different stages. When children are very young, parents are of course focused on their safety, security and growth, but the need for parents to work and the nature of work arrangements is a key driver of decisions around whether to engage in ECEC and what type of service will meet these needs.

Child-oriented needs became particularly prominent for those with older children (3-5 years), which coincides with the period when children can more clearly express their preferences and experiences and when needs for additional support in ECEC become more apparent. This is also the age at which children become eligible to attend pre-school/kinder. Needs commonly expressed by parents at this stage focus on preparing their children for school, socially and developmentally – and parents can reevaluate ECEC choices around this stage in light of these perceived needs.

Professionals in the qualitative research also saw the need for staffing and programming that can be responsive to the interests of the 3–5-year-old child.

"Building on their confidence, so that what they are doing is actually heard and respected. Asking how can I support their passion, their interests branch out into other areas?"

ECEC TEACHER



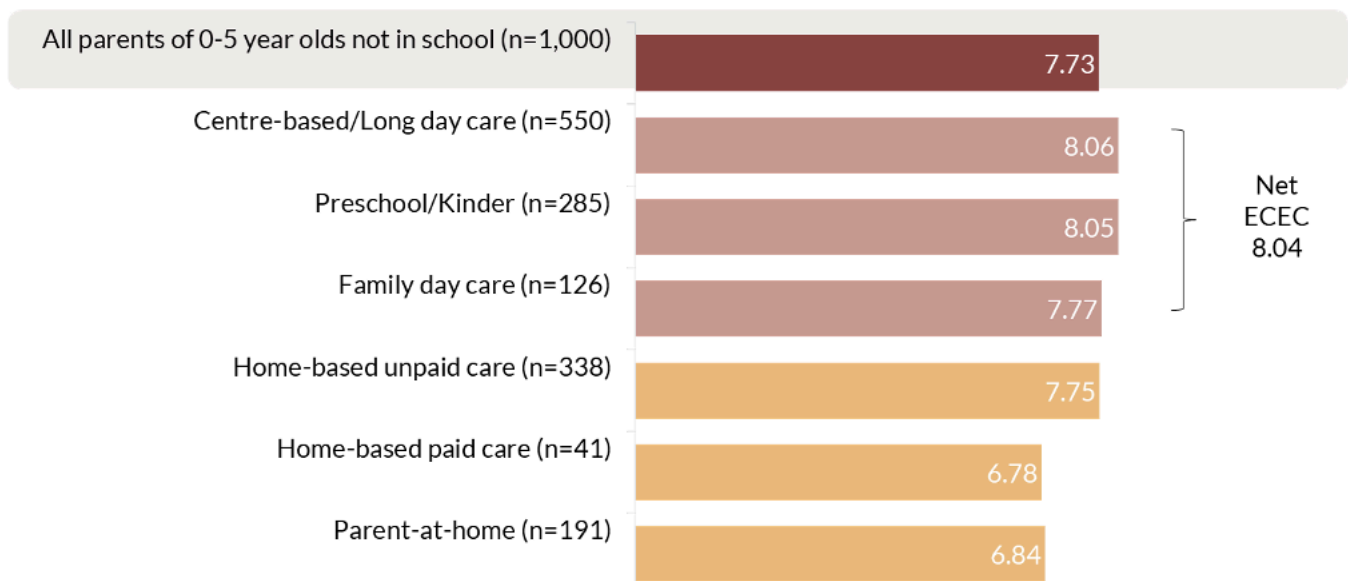
THE EXTENT TO WHICH ECEC ARRANGEMENTS MEET FAMILIES NEEDS

Parents completing the main survey were asked to rate how well their needs are being met by their current arrangements for the education and care of their children aged 0-5 years, using a scale from 0 (not being met at all) to 10 (fully being met).

As shown in Figure 16, the average rating provided by parents, irrespective of type of education and care arrangement in place, was 7.73, suggesting that their needs are being met moderately well, but not completely. This is consistent with corresponding findings from the 2021 Work and Play study.

Parents accessing centre-based/long day care or preschool/kinder tended to believe their needs were being more fully met (means of 8.06 and 8.05, respectively), than did parents accessing home-based paid care (6.78) or with children being cared for exclusively by a parent (6.84).

Figure 16 Extent to which education and care is currently meeting needs (mean ratings)



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

Parents of older children tended to believe that their needs were being more fully met by current arrangements than did parents of younger children. Average ratings were just 7.64 among parents of children under 12 months and 7.53 among parents of one-year-olds. In starkest contrast, the average rating among parents of four-year-olds was 8.07.

A difference in how well current arrangements were perceived to be meeting needs was also observed based on employment status of the survey participant. Mean rating among parents not working full time was 7.79, significantly higher than the average rating among parents working full time (7.67).

QUALITATIVE FINDINGS - MEETING FAMILIES NEEDS

As noted earlier in this report, though they have settled on an education and care arrangement that meets practical needs and speak highly of the services they are using, many parents in the qualitative research still:

- feel as if compromises have been made in reaching this arrangement
- rely on combinations of education and care types in order to meet these needs
- talk about the 'juggle' and 'stress' of managing financial and child rearing obligations.

In this sense, there were few in the qualitative research who feel that their needs are fully being met (or are able to be fully met) by the ECEC system in Australia.

Parents' responses to questions around how they would redesign the ECEC system in Australia to better meet their needs (reported in section 3.5.3) were also illustrative of areas in which needs are not being fully met, particularly in relation to:

- lack of availability
- lack of flexibility
- disparities between similar programs offered in different settings and jurisdictions
- the work, school and ECEC systems not coordinating with each other.

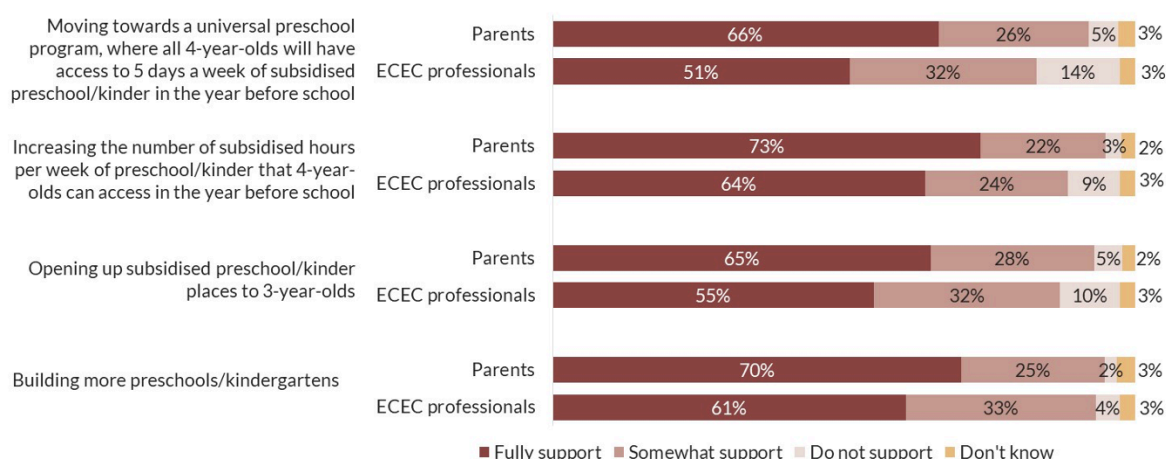
Professionals in the qualitative research, who not surprisingly tended to be oriented towards the needs of children, did make the observation that families often appear to choose a type of ECEC and how they use ECEC (how many hours, and what time of day etc) based on how this fits with the demands of working arrangements, rather than necessarily what is primarily in the best interests of their children.

SUPPORT FOR CHANGES TO PRESCHOOL/KINDER

All main survey participants were asked to indicate the extent to which they supported each of the changes to preschool/kinder if they are available or were to become available in their own state or territory.

As shown in Figure 17, strong support was expressed for all four changes to preschool/kinder, particularly by parents. Support was strongest for increasing the number of subsidised hours per week of preschool/kinder that 4-year-olds can access in the year before school, with 73% of parents and 64% of professionals fully supporting this change.

Figure 17 Support for individual changes to preschool/kinder



Question: Please indicate the extent to which you support each of these changes to preschool/kinder if they are available or were to become available in the state/territory where you live. Base: all parents of children 0-5 not yet at school (n=1,000); ECEC professionals (n=147).

OTHER CHANGES TO BETTER MEET FAMILIES NEEDS

All main survey participants were presented with 11 ways the ECEC system could be potentially adjusted to better suit the needs of parents. These came from a projective exercise run in the qualitative research about what should change in an ideal world*. For each, survey participants were asked whether they personally agreed with such a change. Figure 18 presents the findings from this question for parents, and Figure 19 presents the findings from this question for ECEC professionals. In both cases, statements are ranked from largest to smallest proportion of survey participants agreeing (either strongly or somewhat) with the statement.

The possible improvement attracting the highest level of agreement among parents was more casual care options being made available for people who work casually or flexibly – with 40% of parents strongly and a further 43% of parents somewhat supporting such an adjustment.

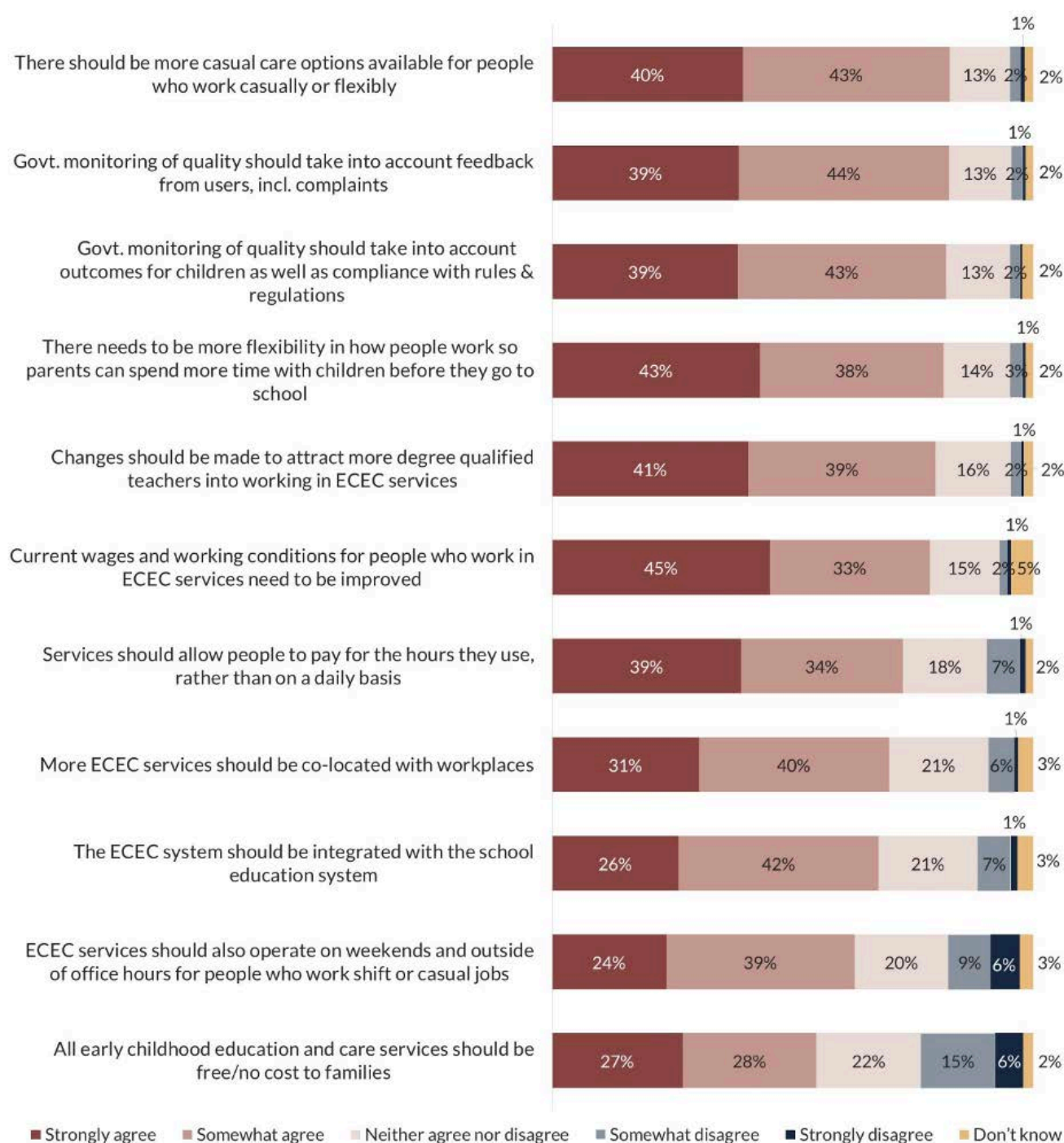
The possible improvement attracting the highest level of agreement among ECEC professionals surveyed was the improvement of wages and working conditions for people who work in early childhood education and care services– with 70% of this audience strongly agreeing with this, and a further 20% somewhat agreeing.

Five of the possible improvements to the ECEC system attracted widespread agreement across both audiences, with at least three quarters of both parents and ECEC professionals surveyed indicating they agreed (either strongly or somewhat) with such a change. These included:

- Improved wages and working conditions for people who work in ECEC services (79% of parents and 90% of ECEC professionals agreed with this) – the proportion for parents is significantly higher than in the 2021 Work and Play study when this question was also asked (72%)
- Government monitoring of service quality being expanded to take into account not just compliance with rules and regulations, but also:
 - the outcomes they provide for children (82% of parents and 88% of ECEC professionals)
 - feedback from users of the services, including complaints (83% of parents and 78% of ECEC professionals)
- Greater flexibility in how people work, so that parents can spend more time with their young children before they go to school (82% of parents and 83% of ECEC professionals)
- Changes to attract more degree qualified teachers into working in ECEC services (80% of parents and 84% of ECEC).

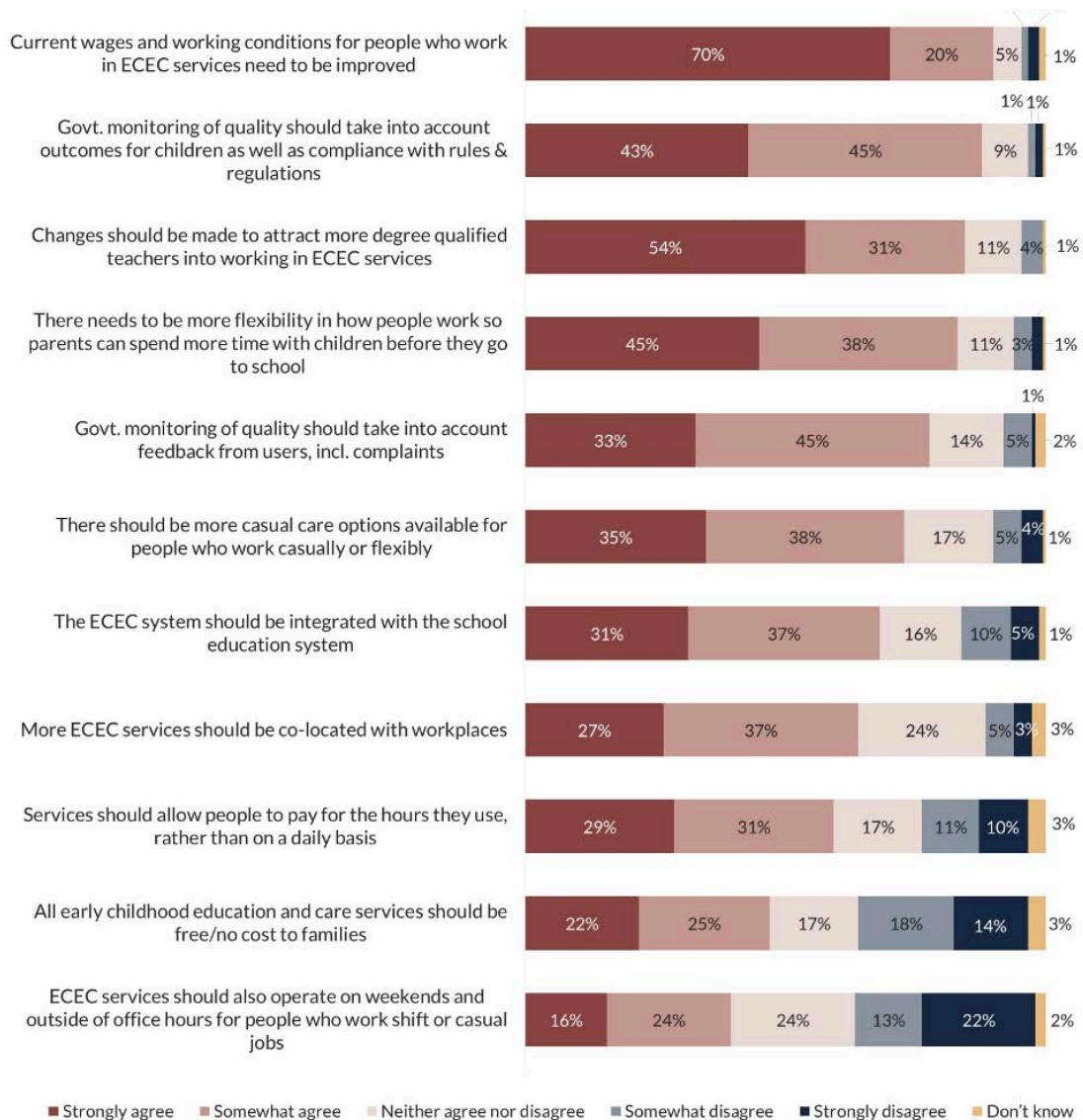


Figure 18: Parents' agreement with statements relating to ways the ECEC system could be improved



Question: Parents have suggested a range of possible ways in which the early childhood education and care (ECEC) system could be adjusted to better suit their needs. Please indicate the extent to which you personally agree with each of the following statements.

Figure 19: ECEC professionals' agreement with statements relating to ways the ECEC system could be improved



Question: Parents have suggested a range of possible ways in which the early childhood education and care (ECEC) system could be adjusted to better suit their needs. Please indicate the extent to which you personally agree with each of the following statements.



QUALITATIVE FINDINGS - CHANGES TO BETTER MEET NEEDS

Participants in the qualitative research were taken through a projective exercise in which they were asked to imagine a world without the current ECEC system and how this might impact their lives. They were then asked to imagine how they might design a new system that perfectly meets their needs.

This exercise revealed that:

- Australia's ECEC system is highly valued and seen as crucial for the smooth operation of society, for children's development, and parent's ability to provide for their families and achieve their goals. It is also seen as an economic leveller, supporting people from more disadvantaged backgrounds to work, study and participate fully in society.
- Parents perceive that, individually and collectively, there would be significant negative impacts if the current ECEC system ceased to exist – parents would not be able to work and the increased burden of care would fall predominantly on mothers, placing significant strain on family finance and relationships. Many parents also imagine negative consequences for their mental health under such a scenario. At a societal level, skills shortages in female dominated sectors such as teaching and nursing would be exacerbated with impacts for the overall economy. Children would miss out on important opportunities to socialise, and would likely experience developmental delays in a number of areas. Most would start school with fewer skills and abilities than they do now.
- There are a number of ways in which people would redesign the ECEC to better meet families needs, including:
 - Making ECEC free for all.
 - Implementing a national curricula and consistent system and level of quality across all settings and jurisdictions.
 - Improving accessibility and flexibility – so that there is a place for everyone who needs one, and for as much or as little time as required. Families being able to access formal care on weekends/late at night if needed and casual options available.
 - Improving pay and working conditions for people working in ECEC, and other measures to attract and retain high quality staff, such as increasing qualifications and improving the public standing of the profession.
 - Adjusting workplaces and mindsets to more seamlessly integrate education and care with work or support balance for families over the early years of children's lives.
 - Integrating ECEC into the formal schooling system.

Professionals in the qualitative research echoed many of these improvements. Particular improvements raised included:

- Higher ratios of staff to children.
- Better pay and conditions.
- Improved recognition and support for ECEC professionals.
- Addressing perceived disparities between the public and private sector providers.

"Make it that every kindergarten teacher across the board gets the same working conditions, wages, professional development, planning. Regulate long day care so that the standards in the long day care can match the standards that the Government are already using."

ECEC TEACHER



DISCUSSION

DISCUSSION

This research reconfirms a number of insights about Australian families and ECEC reported in previous research, including that:

- Australia's early childhood education and care system is critically needed and widely appreciated – almost all families interact with some form of ECEC before their child attends primary school and feel grateful that such services exist.
- Parents perceive a wide range of benefits that can flow from ECEC to their children, to themselves and to their families broader wellbeing.
- Parents crave assurance that the choices they have made around work and ECEC will yield net benefits for (and at the very least will not harm) their children, because they are also very attuned to the associated challenges, compromises, costs and missed opportunities that can stem from these choices.
- Parents perceive their ability to make decisions that are in their families best interests are constrained by a web of internal and external factors, such as but not limited to:
 - Internal - limitations in their awareness of and access to information that can inform choices, internalisation of societal and workplace expectations and relational obligations, personal and cultural values, and beliefs about what it means to be a good parent.
 - External – cost of living and other financial pressures, structural inequalities, lack of access to informal supports, inflexibility of service design, lack of service availability, and service inability to meet specific complex needs.
- Needs are not fully being met by the ECEC system, leading to piecemeal, complex or inadequate education and care arrangements, causing stress for families.
- Service users and employees support changes to increase:
 - flexibility, access and choice
 - professionalism of teaching and working conditions
 - quality and accountability of services - ensuring regulatory frameworks and assessments of quality consider and promote indicators parents are most interested in.

This current research also extends and updates our understanding of families and ECEC by contributing additional insights in the following areas:

EXPERIENCES OF ECEC

1. Lingering impacts of COVID are being felt across the sector, impacting needs, access, quality and choices

Parents and professionals identify developmental needs in children they attribute to early experiences and deprivations of COVID - decisions are made about ECEC in reference to these needs and professionals feel increased pressure and inadequate capability and capacity to support them. Population shifts to regional areas through and after the pandemic have anecdotally increased demand for limited services in some places, leading to less choice and more access issues as limited services struggle to cater for larger populations with more young families.

Parents and professionals perceive increasing burn out among educators and teachers over the last two to three years, leading to staff turnover and shortages, ratios being harder to meet, further pressure on remaining staff and lapses in quality.

2. Cost of living pressures are prompting varied shifts in ECEC use

Families with young children are experiencing financial stress from inflation and increasing interest rates. Some are already having to change work arrangements or cut costs to respond to these pressures. Families differ in the choices they are making in response to this. Some choices are

increasing demand for ECEC services (going back to work earlier than planned, working more or changing jobs), while others are reducing demand (using less ECEC and more informal care).

3. Government policies to improve affordability of ECEC for families are welcomed and have benefited many, but some parents may not perceive these benefits are flowing through to them

This research suggests that CCS changes have improved affordability for many families. Around half of ECEC-using parents aware of CCS changes have noticed they are now paying less for these services and/or have been able to increase the amount of care they are using as a result. There is some evidence, though, that positive impacts have not been universally felt, with some not noticing any difference to their fees, and indications that some services have absorbed changes to the subsidy into increased fees. Alongside this, parents also question the appropriateness of extending the CCS to very high-income families. In Victoria, the promise of free 3- and 4-year-old kinder has not become a reality for some families using preschool programs in long day care, leading to concerns of a dual system where preschool is free for families with the means and ability to use community kinder (e.g. where a parent can drop off and pick up over school hours) but not free for those who need to use long day care services.

4. Changes to preschool/kinder are supported, but some lack awareness of the benefits of universal programs and anticipate unintended consequences.

This research reveals there is some work to be done to communicate to parents the benefit of universal preschool, to allay fears about the capacity of 3- and 4-years-olds to thrive in such programs, and to communicate details of how such programs would work and what they would cost. Parents in states where preschool programs are delivered across a range of settings, including long day care, community and government preschools and in private schools are particularly keen to know more details about how such a system would work in practice.

NARRATIVES AND BELIEFS

3. Parents don't perceive a unified ECEC system or sector in Australia: they perceive care-oriented services and education-oriented services and attach different narratives to each.

This research reveals that communicating to parents about 'ECEC' as a sector is challenging given parents are unfamiliar with this term and do not seem to perceive the services that comprise ECEC as a unified system or sector. Parents unconsciously reveal a distinction they make between:

- **Care oriented services** that support parents who have to work, such as long day care, family day care and nannies. Similar narratives are attached to these services (particularly long day care, which is still often called 'childcare') as other care-sector services such as aged care and disability care, for example values-based narratives around 'the outsourcing of care to strangers'. Similar other narratives across these different care services include that the workers providing 'care' are low-skilled, often have English as a second language, are poorly paid, may not be there for the 'right reasons', and are undertaking low skilled, but necessary work that many others would never or could never consider doing themselves.
- **Education-oriented services** that are seen to explicitly focus on preparing children for school - Community and government-run sessional preschools/kinders tend to be associated more with education than care, and in some states they actually are a formal part of the state education system. These services are spoken about with reverence, and in language that suggests they are perceived as valuable, high quality, and operate for the benefit of the community, rather than for profit. People who work in this setting are mostly described in positive terms that revere their standing or contribution to society and children, and that imply they hold 'the right' motivations for undertaking these jobs.

In contrast, preschool programs delivered in long day care settings are not as closely associated with education and the education system – these programs are more opaque to parents, even those whose children attend such programs – and so more negative or neutral narratives exist in this setting, such as that children don't do anything different in the preschool group than in the other groups in the centre, that preschool programs are not as rigorous or curriculum-based, or that those who teach in this setting are less competent or qualified than those working in sessional preschools/kinders.

4. Narratives and beliefs act as barriers to considering different forms of ECEC and fuel parental anxiety and guilt.

Beliefs about early childhood development interact with setting-based narratives to produce narratives around which types of care and education are 'best' for children at different stages of their young lives, which in turn guide and limit perceived choices.

Significant opportunities exist to address narratives built on misperceptions and incorrect assumptions and that may act as barriers to considering different types of ECEC for children of different ages and that fuel unnecessary parental guilt. Correcting misperceptions about the qualifications and roles of ECEC teachers and educators and increasing awareness and understanding of the quality of preschool programs delivered in long day care appear to be paramount.

Deepening parental understanding of child development and the different ways in which ECEC can meet the changing developmental needs of children over time will also serve to allay some parental fears and guilt about the suitability of services they choose or need to use.

QUALITY

5. Quality of education and care is seen and experienced variably across ECEC settings and services.

The research reveals that, though overall quality is described as high, both parents and professionals perceive a range of pressures they feel are impacting quality in ECEC services they have familiarity with. These are primarily related to working conditions for staff as most parents attribute quality education and care to happy and engaged staff. Pressures on quality include staff shortages, low pay and morale, overworked staff through COVID, poor working conditions and admin burden. Most feel quality issues are localised to some areas and individual services, but media stories and word of mouth can signal to parents that declining quality may be a sector-wide problem. Where parents need to work and service choice/access is limited, this exacerbates worry and feelings of guilt among parents who feel they have no choice but to continue sending children to a service they may not be entirely comfortable with or at which children may not be happy.

For these reasons, parents and professionals alike are strongly supportive of changes to improve pay and working conditions for educators and teachers working in ECEC.

6. Though parents and ECEC professionals are concerned about quality, barriers prevent quality being fully considered in decision making, and parents lack skills and tools to monitor quality over time.

Parents sense good quality and bad quality education and care, but they lack the opportunity, information and tools to make ECEC decisions that fully and objectively consider quality. Parents do not see quality ratings or other sources they use providing information on indicators of quality that are meaningful to them, such as how staff interact with children and each other. They also don't feel that ratings and other information sources are transparent enough and would like to know how specific services are meeting outcomes for children, and have access to user satisfaction, issues and complaints data.

Even where parents can discern service quality, limited choice of services and high need means information about quality is often unable to be acted on, with families taking whatever they can get and being stuck in services even if quality issues arise. In such a context, parents can be unconsciously motivated to ignore, overlook or minimise quality-related signals to avoid the frustration, anxiety and guilt triggered by the prospect of risks to their children that they can do nothing about.

7. The areas of quality that parents value align with the National Quality Standard for ECEC, however, parents assess and describe them in different terms.

Parents reported valuing staff interaction with children, staff and staffing arrangements, cleanliness and communication in their assessment of quality. Many of these areas align with the seven quality areas* embedded in Australia's National Quality Standard. While the NQS provided detailed descriptions and indicators of quality in action, they differ from the ways that parents describe and assess them, for example, parents often describing how they 'feel' about a services rather than citing a quality rating.

MEETING NEEDS

8. Families needs are changing, and the system is slow to transform to meet them - new pockets of unmet need may be emerging that warrant attention.

Post-COVID flexible working arrangements have added an additional dimension to calls for more flexible ECEC options that have persisted for some time. It is now not only shift and casual workers who require or would benefit from a more flexible type of care and education arrangement than ECEC services currently provide.

Since the 2021 Work and Play study was conducted in 2021, parents have more varied flexible working arrangements and those returning to work are considering a wider range of options for what this could look like – fully or partly working from home or changing on a regular, semi-regular or as-needed basis. More casual daily and hourly care options that allow parents to match care with work and other obligations in a truly flexible way are required but are very rare.

There is a lack of centre-based services that charge on an hourly basis or that allow attendance days to be set over a longer period such as a fortnight or a month. Joining shift and casual workers, parents with young children and other flexible work are either locked out of work opportunities or locked out of centre-based care. There is a risk we'll see increasing reliance on informal care, arrangements that combine services or service types, families paying unnecessarily for set days they don't need or rarely can use, or greater juggling of care and work schedules between partners where one or both have the ability to work from home. Flexible working in this way is likely to add to the stress and cost of balancing work and family life rather than supporting it. Parents dream of an education and care system that reduces this friction and more closely aligns with how and where work is done, a dream which extends to the primary and secondary school systems as well.

UNDERSTANDING AUDIENCE DIFFERENCES - THE EMPATHY MAP FRAMEWORK

Empathy mapping can help decision-makers and advocates of change in the ECEC sector to understand what drives the behaviour of parents and ECEC professionals more deeply. Empathy maps were produced for three core parent groups - parents of babies, parents of toddlers and parents of preschoolers - in 2021 and the findings of the current research have been used to deepen the insights included in these. An additional two empathy maps have been created for ECEC educators and teachers. These were first created as part of work Heartward completed on the Front Project's communication strategy and have been extended based on insights from the current research. These empathy maps provide information on each audience, and its goals, motives, perceptions, influences and behaviours. This can be useful in system, service and communication design aimed at these audiences on topics relevant to ECEC.

* Quality Areas within the National Quality Standard: The Educational program and practice, Children's health and safety, Physical environment, Staffing arrangements, Relationships with children, Collaborative partnerships with families and communities, and Governance and leadership

Figure 25. Guide to reading audience empathy maps

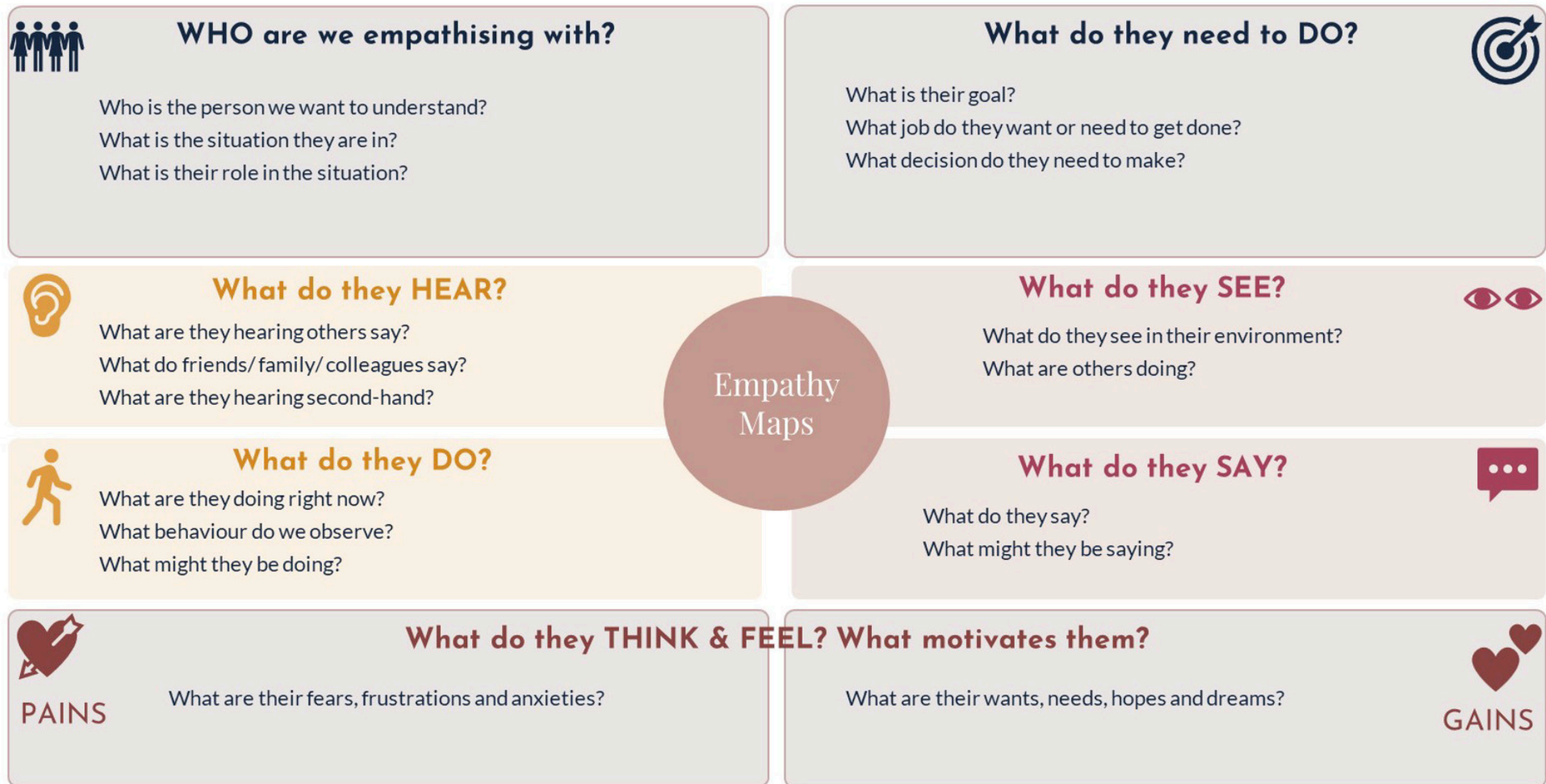


Figure 26. Empathy Map – Parents of Babies

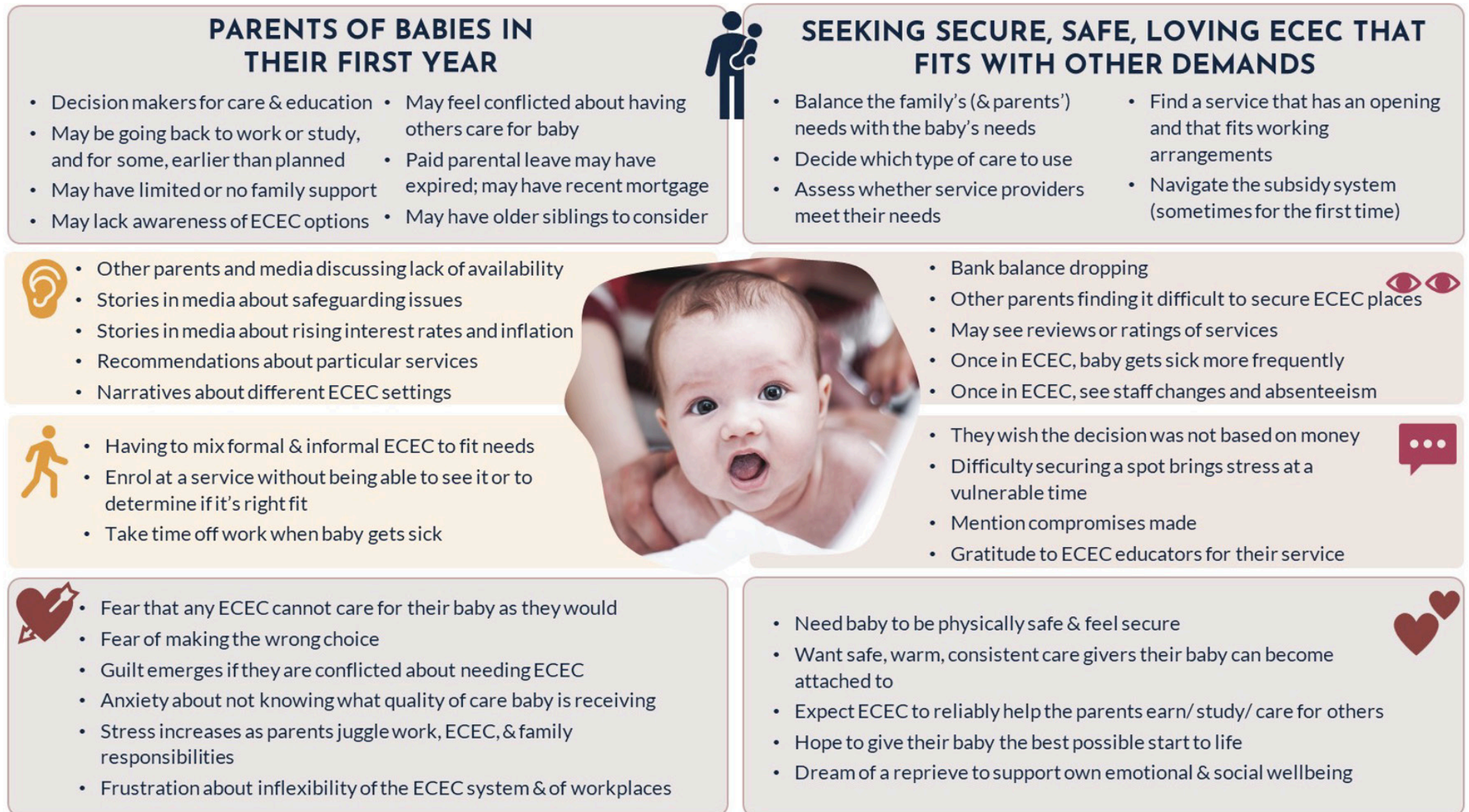


Figure 27. Empathy Map – Parents of Toddlers

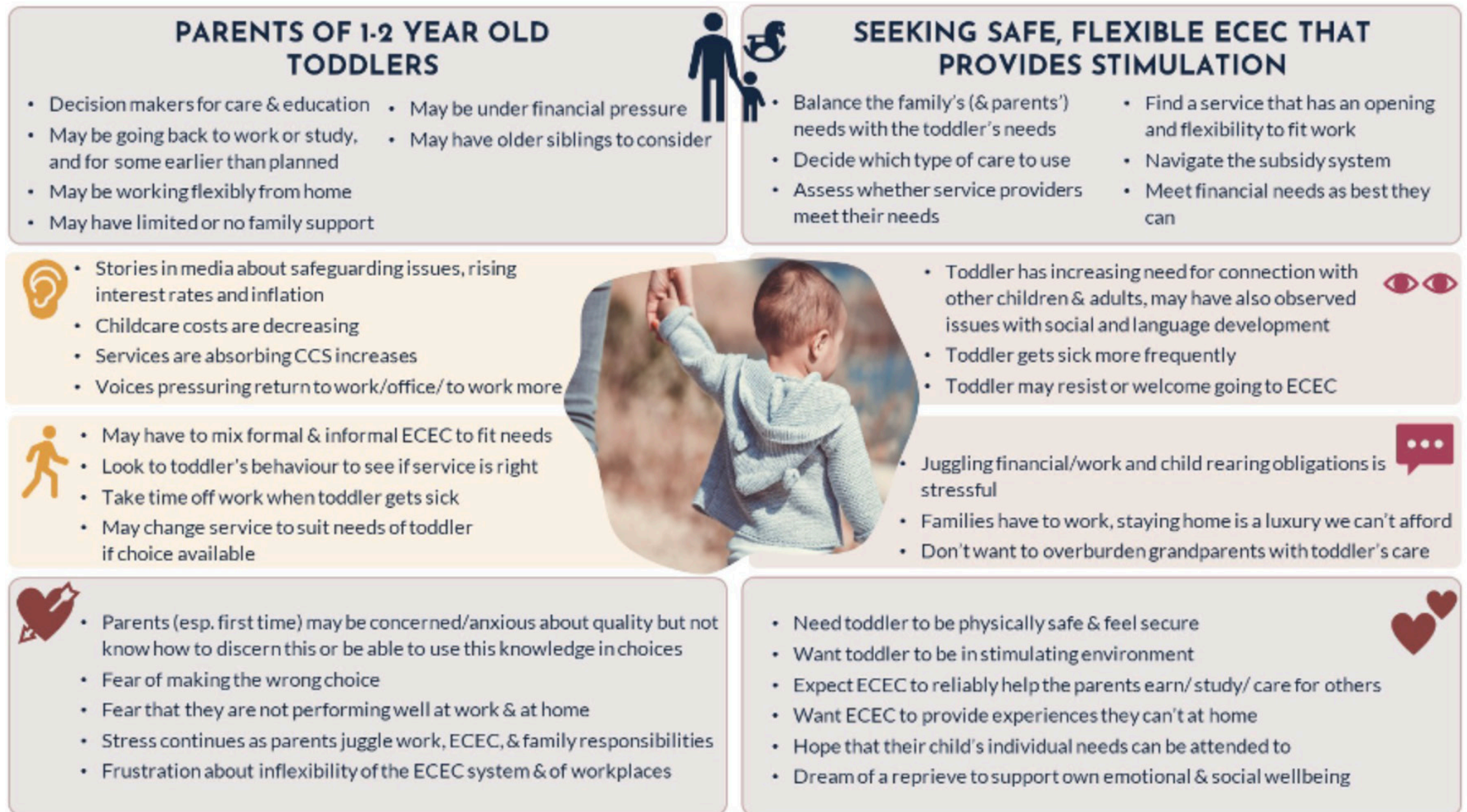


Figure 28. Empathy Map – Parents of Pre-Schoolers

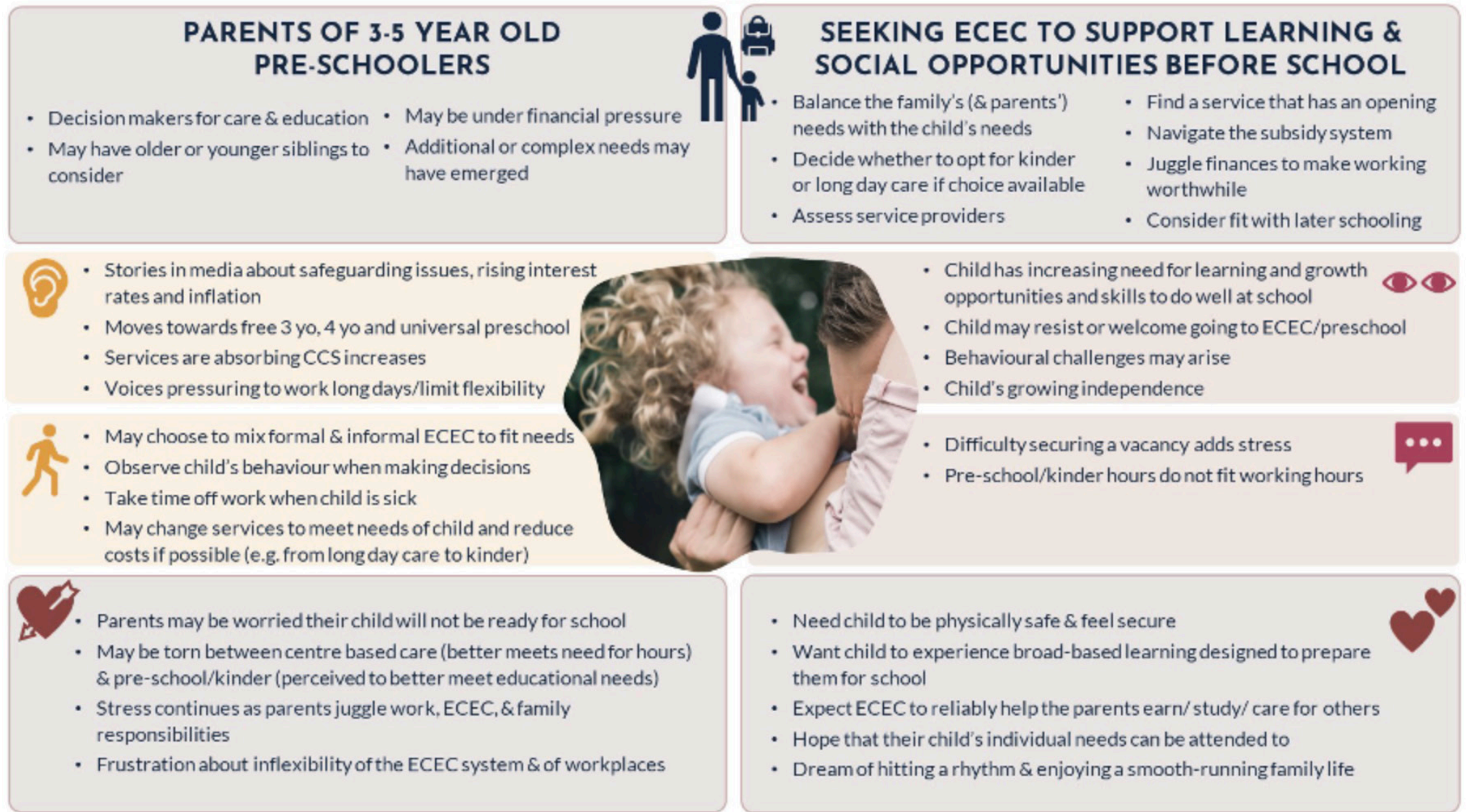


Figure 29. Empathy Map – ECEC Educators

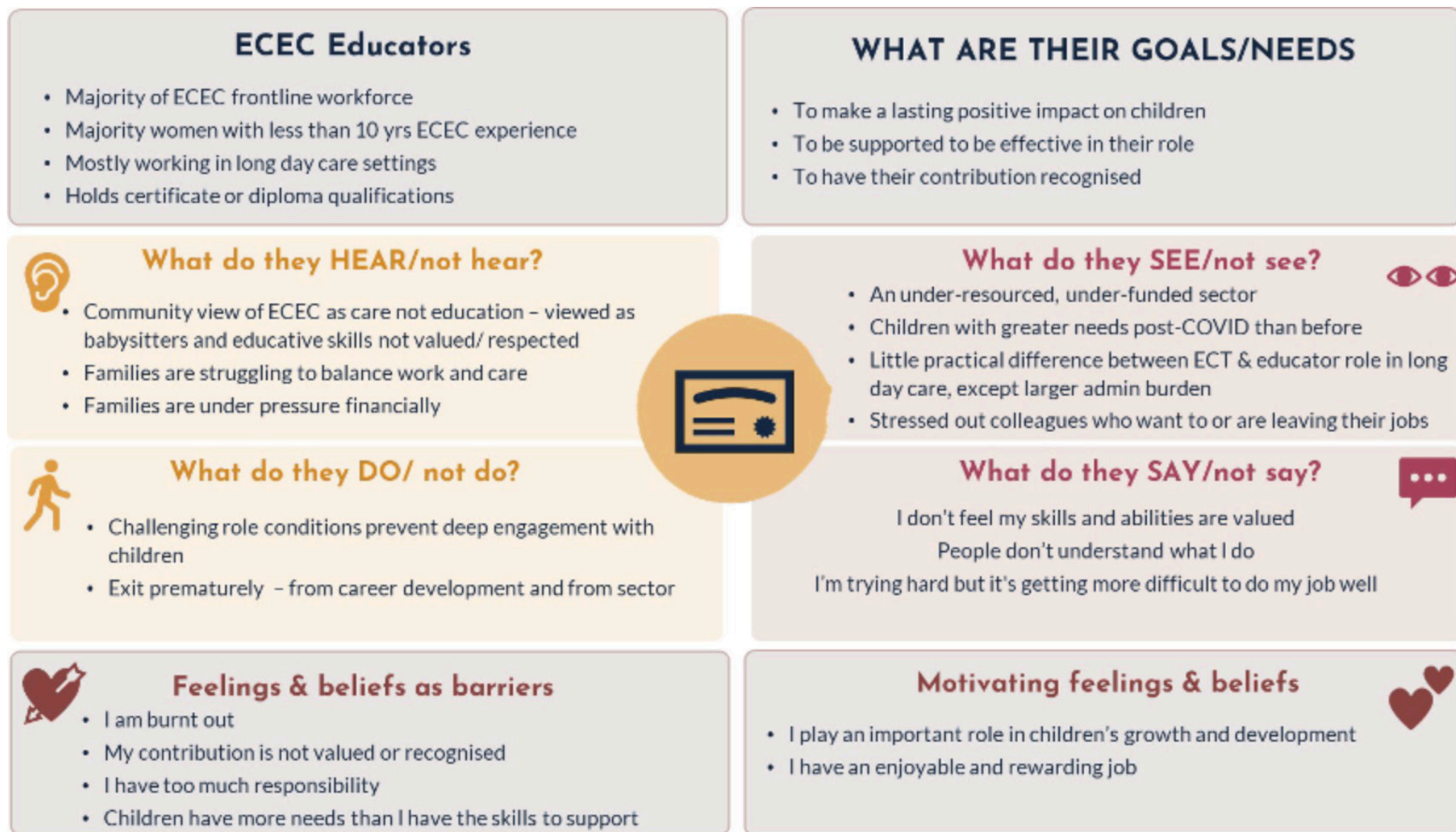
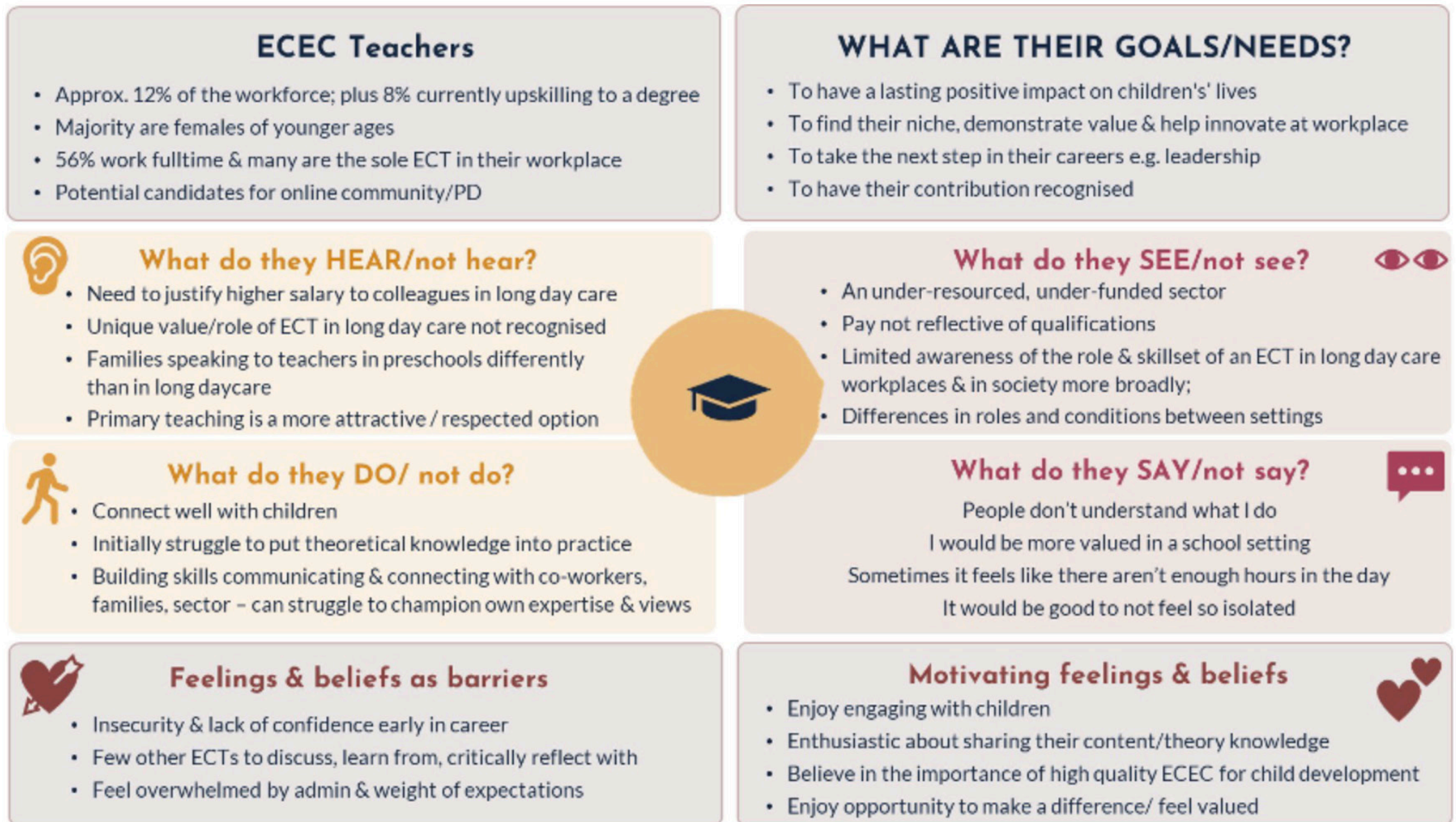


Figure 30. Empathy Map – ECEC Teachers



APPENDIX: SURVEY SAMPLE CHARACTERISTICS

	Category	Main survey (July/August 2023)		Follow-up poll (October 2023)
		Parent sample % (n=1000)	ECEC professionals% (n=147)	Parent sample % (n=1025)
Age	18-24	2%	3%	3%
	25-34	54%	40%	47%
	35-44	38%	22%	43%
	45-54	5%	12%	6%
	55-64	0%	13%	1%
	65+	0%	10%	0%
Gender	A man or male	35%	13%	36%
	A woman or female	65%	87%	64%
	Non-binary	0%	0%	0%
State	NSW/ACT	30%	31%	30%
	VIC/TAS	32%	39%	32%
	QLD	15%	10%	18%
	SA/NT	12%	12%	10%
	WA	10%	9%	11%
Location	Metropolitan area	74%	75%	80%
	Regional, rural and remote area	26%	25%	20%

Highest level of education	Postgraduate degree	20%	19%	21%
	Graduate diploma / certificat	9%	15%	8%
	Bachelor degree	36%	38%	34%
	Advanced diploma / diploma	9%	16%	9%
	Technical/trade or other certificate (e.g. Cert III, Cert IV)	17%	9%	15%
	High school	9%	3%	12%
	Primary school	0%	0%	0%
Cultural Diversity	First Nations Australian	3%	4%	4%
	Speaks a language other than English	20%	18%	20%
Annual household income before tax	Under \$70,000	11%		14%
	\$70,000 - \$121,000	27%		27%
	\$122,000 - \$174,000	27%		24%
	\$175,000 - \$254,000	23%		19%
	\$255,000+	13%		8%



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

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