

What Do Parents Want? Australian childcare preferences and attitudes

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POLICY Paper 22

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Introduction

In Australia, many parents with young children rely on childcare to enable them to fulfil their working commitments. Affordability remains a key issue with hourly fees for long day care (the most commonly used type of childcare) increasing by more than 6% annually on average since 2009.¹ The federal government is expected to spend more than \$8 billion in 2019-20 on subsidies for formal childcare, intended to make childcare more affordable for parents.²

At the same time, formal childcare in Australia has become increasingly regulated, with a growing focus on service quality as measured by an emphasis on early learning. Formal childcare services are

required to comply with a raft of stringent regulations administered by state and territory governments. Consequently, childcare in Australia is a highly regulated and subsidised service.

Is the childcare system delivering what parents truly want? This policy paper analyses the preferences and priorities of Australian parents in relation to childcare, based on the insights gathered from a targeted survey of working mothers who are using formal childcare. The paper also examines whether parents' priorities align with *government* priorities for childcare and identifies some key implications for governments.

Context of the survey

The number of childcare services in Australia has grown significantly in recent years due to growing demand, including from mothers returning to the workforce.³ According to the 2018 Household Income and Labour Dynamics (HILDA) report, "both couple and single mothers' employment participation has increased notably over the 2002 to 2016 period, and ... the increase was particularly marked between 2013/14 and 2015/16."

Traditionally, governments in Australia have subsidised childcare fees for the purpose of supporting mothers in returning to work. However, in more recent years, federal and state governments have increasingly turned their focus to promoting formal childcare as a form of early education.

Use of childcare in Australia

In Australia, around half of all children aged 0-12 receive some sort of non-parental care.⁴ However, less than a third – around a million children – receive formal childcare, which includes long day care, family day care, and outside school hours care. Other children either receive informal care (for example, care from grandparents, a nanny or a babysitter) or a mix of formal and informal care. Grandparents are the mostly commonly used type of informal childcare, with nearly 22% of children aged 0-12 receiving care from a grandparent.⁵

The Australian Government Department of Education and Training's Early Childhood and Child Care in

Summary (June quarter 2018) advised that there were 18,782 approved child care services providing care across the country. A total of 800,390 families were receiving the Child Care Rebate (CCR), now known as the Child Care Subsidy.

According to recent government data, children attend formal childcare for an average of 23.6 hours of care per week. However, the average number of hours in long day care is higher, at 28.6 hours per week.⁶ While there has been a shift from using informal to formal childcare over time, there has been little change in the overall use of childcare over the past two decades.⁷

The majority of parents use childcare for work-related reasons. Survey data from the Australian Bureau of Statistics indicates that more than three quarters of children attend formal childcare (76.6%) for work-related reasons, compared to around 14.6% who attend childcare because it is “beneficial for child” and 7.2% due to other personal reasons.⁸

Childcare costs and availability

Childcare fees in Australia have been growing well above inflation in recent years. Across all childcare types, hourly fees increased on average by 20.7% in real terms between 2011 and 2017. Average fees for long day care (the most common type of formal childcare) have increased by an average 6.5% annually since 2009 – well above average inflation.⁹

Most families who use approved formal childcare claim taxpayer subsidies to assist with childcare fees.¹⁰ However, even after accounting for subsidies, average out-of-pocket costs for parents still grew by almost 50% in real terms between 2011 and 2017.¹¹

This growth in costs, in turn, has put pressure on the federal government to provide more generous subsidies for formal childcare. In 2018, the federal government introduced a new funding system, the Child Care Subsidy, to replace the Child Care Rebate and Child Care Benefit.

While the Child Care Subsidy provides more generous fee assistance to some families, it also includes a stricter work test. To claim the subsidy, parents must be working, studying or looking for work. Depending on their income, families can claim a subsidy of between 85% and 20% of the hourly childcare fee or relevant benchmark price. For families with incomes up to \$186,958, there is no annual cap on how much they can claim in subsidies.

As well as cost, availability of childcare can also be an issue for parents. While pockets of ‘oversupply’ of childcare services have been reported in some urban areas,¹² there have also been concerns about a shortage of places for children aged 0-2 and increasing demand for outside-school-hours care.¹³ To ration the allocation of childcare places, some childcare services use waiting lists, with parents sometimes paying a fee to be added to a waiting list at their preferred service.¹⁴

The National Quality Framework

With an increasing emphasis on early childhood learning, formal childcare in Australia has been subject to growing regulation over decades. Traditionally, each state and territory government has been responsible for regulating local childcare services.

In 2012, the Council of Australian Governments (COAG) adopted the National Quality Framework, with the aim of harmonising the regulation and quality of formal childcare services across Australia.

A core element of the NQF is the staffing and qualification rules, comprising minimum staff-to-child ratios and requirements for staff to hold approved qualifications in early childhood care and education. Under the NQF, childcare services are also required to base their education programs on approved learning frameworks and submit to regular quality assessments by state regulatory agencies. Childcare services are assessed and rated against benchmark standards relating to seven quality areas:

- Education program and practice
- Children’s health and safety
- Physical environment
- Staffing arrangements
- Relationships with children
- Collaborative partnerships with families and communities
- Governance and leadership

These regulations and standards have put upward pressure on the operating costs of childcare services, particularly staffing costs which can account for more than 60% of a childcare centre’s operating expenses.¹⁵ The costs have contributed to real growth in childcare fees and out-of-pocket costs for parents.¹⁶ Nevertheless, surveys indicate that parents have persistently low awareness of the NQF and the associated standards that childcare services must comply with.¹⁷

The trade-offs in childcare policy

Governments are focused on two distinct aspects of childcare: the *quality* of childcare as defined by structural indicators like staff ratios, and the *affordability* of childcare, as a way to support parents’ participation in the workforce. However, this means the funding and regulation of childcare in Australia currently work at cross-purposes: quality regulations increase costs for parents, while government subsidies attempt to reduce costs for parents.

This tension between these two policy objectives helps to explain why childcare out-of-pocket costs for parents have continued to grow in real terms, despite increased spending on childcare subsidies. The tension between promoting affordability and structural quality in childcare presents an ongoing challenge to federal and state governments in Australia.

Survey findings

Priorities and preferences in childcare

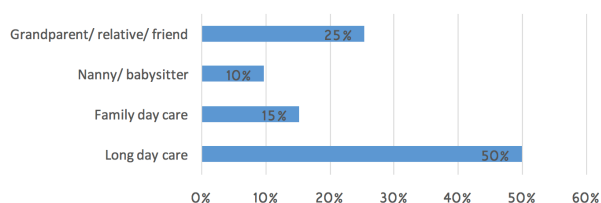
Question 1 of the YouGov survey asked mothers to nominate their preferred type of childcare. Putting aside cost considerations, just half of the mothers surveyed nominated long day care as their preferred type of childcare (50%). However, it should be noted that long day care is used by the majority of mothers in the survey. Therefore, it is not surprising that mothers would express a preference for long day care if they are satisfied with their current childcare arrangements.

The second most preferred type of childcare was grandparents or relatives. Overall, 25% of working mothers nominated grandparents/relatives as their preferred option. Those who used a combination of formal and informal childcare were slightly more likely to nominate grandparents as their preferred option (32%). Mothers who work part-time were also more likely to prefer informal care (30%), compared to mothers working full-time (20%). This makes sense, as informal care can be more flexible and better accommodate part-time or irregular working hours.

Interestingly, of mothers who rely on formal childcare only, one in five still nominated informal care as their preferred option. That is, 20% of these mothers still nominated grandparents or relatives as their preferred option, while 8% nominated a nanny or babysitter.

Overall, the results suggest that using formal childcare does not necessarily reflect the preferred choice of all working mothers. Some parents may prefer informal childcare, for reasons that might include flexibility, convenience and the benefits of at-home care. Yet due to necessity, practicality or lack of alternative options, their child attends a day care centre instead. Why would this be? Parents can face choice constraints for various reasons. Possible reasons could include a lack of family living nearby; the expense of hiring a nanny or babysitter; or family members having limited availability to provide care, due to their own work commitments.

Figure 1: Preferred type of childcare among working mothers who use formal childcare



It should also be noted that the Child Care Subsidy offers financial incentive to working parents to use formal childcare. The incentive effect could help explain why some parents choose to use formal childcare, even if they prefer informal childcare.

Question 2 further probed mothers' preferences, asking about the most factors in selecting a childcare service (Figure 2a). The warmth of the care-giving was the most important consideration according to the largest group of working mothers (24%). This was followed by location (18%) and cost (15%). Staff credentials (9%) and early learning (10%) were least likely to be nominated as the most important consideration.

Working mothers were also asked to rank all priorities in order of importance (Figure 2b). Overall, warmth of care-giving was most likely to appear in their top three priorities (60%), followed by location (56%) and cost (48%). Again, early learning and staff credentials were least likely to be ranked among mothers' top three priorities.

This sits in marked contrast to the emphasis of the National Quality Framework on the educational aspects of childcare. Under the NQF, childcare staff are required to hold at least a certificate or diploma level qualification in early childhood education and care. However, these results reinforce the findings of a recent survey commissioned by the national childcare authority,¹⁸ which indicates that parents have persistently low awareness of childcare quality standards, despite the NQF being in place for seven years now.

Figure 2a: Most important factor in selecting childcare

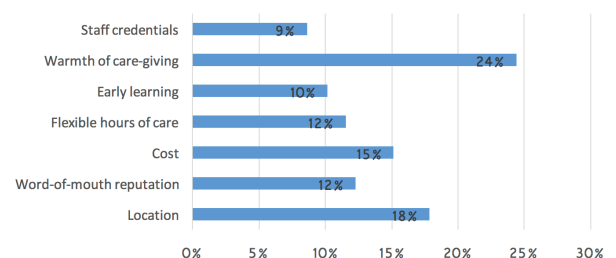
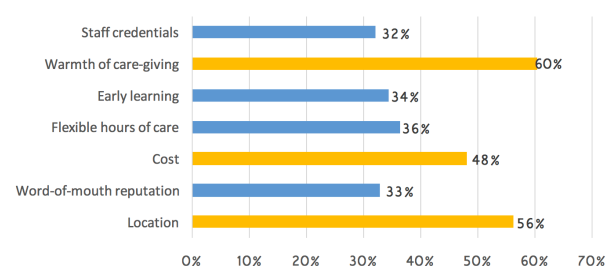


Figure 2b: Top three most important factors in selecting childcare



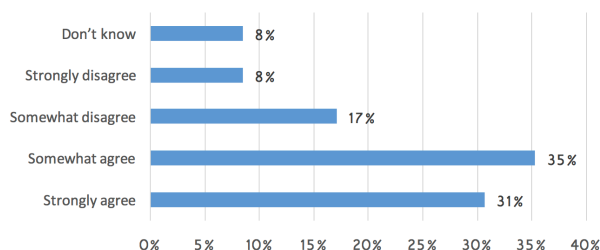
Taken together, the responses to Questions 1 and 2 offer some valuable insights into childcare in Australia. While parents may rely on a particular type of childcare, it cannot be assumed that it represents their preferred option. This is also supported by what mothers identified as their most important priorities in selecting childcare – warmth of care-giving, location and cost/affordability.

It should be noted these factors are not unique to formal, centre-based childcare. For example, some parents may believe that grandparents can provide a better quality of care-giving. They may also prefer childcare that can be provided at home, which relates to 'location' as a priority. Therefore, these factors may help to explain the 25% of working mothers who expressed a preference for childcare provided by grandparents/relatives.

Views on government subsidies for childcare

Question 3 surveyed working mothers for their views on government subsidies for childcare. Overall, the majority supported the idea of extending subsidies to informal childcare (Figure 3). Two-thirds of working mothers (66%) said they would like the option of using subsidies they receive for formal childcare to instead help subsidise informal childcare – even if it meant receiving a lower subsidy overall. It is notable that working mothers still indicated support for this option, despite the qualifying trade-off of receiving less financial assistance overall.

Figure 3: Agree/disagree: I would prefer to be able to use government subsidies for informal care - even if it meant receiving a lower subsidy overall.



This could suggest that working mothers see other benefits in using informal childcare, which offset the cost of losing some financial assistance. For example, parents may value the added flexibility or convenience of informal care such as being able to more easily vary the hours of childcare from week to week. As the survey responses also indicated, cost is not the only important factor to working mothers in selecting childcare. Therefore, offering more subsidies for formal childcare is unlikely to be a fix-all for parents with different needs and priorities. Similarly, the

survey responses suggest that more regulation of formal childcare will not necessarily help parents who prefer to use informal care or do not place a relatively high value on staff credentials or early learning services.

Significantly, among working mothers who rely on formal care only, there was still a similar level of support (64%) for using subsidies to help pay for informal childcare. This may suggest that mothers would consider alternative options to formal childcare, if there was equivalent financial support available. Alternatively, it could suggest that working mothers simply like the idea of more flexibility and choice in selecting childcare, regardless of whether they would personally benefit from more choice or not.

Just 8% of working mothers strongly disagreed with the idea of subsidies for informal childcare. This again draws attention to the apparent disconnect between what parents value and the focus of governments on quality regulation. If there was strong support among parents for the National Quality Framework (which only applies to formal childcare), then we would expect parents to view formal childcare as more 'deserving' of subsidies. However, this is clearly not the case. Rather, parents appear to regard formal and informal childcare as substitutes – both valid options that enable parents to work.

Younger mothers were more in favour of this proposal (78% of 18-29 year olds), compared to older working mothers (65% of 35 years and older). Older mothers may find it easier to afford long day care or younger mothers may be more likely to have grandparents with capacity to provide childcare. Alternatively, younger mothers with less experience of parenting may place a higher value on having family support around them.

Working mothers with children aged above five were more likely to support subsidies for informal care (72%), compared to mothers with younger children only (63%). One possible explanation could be that working mothers with school-aged children are more likely to require incidental or occasional childcare outside school hours. These mothers might therefore see personal benefit in expanding subsidies to informal care.

The results suggest that many mothers regard formal and informal childcare as equally valid options. This is also supported by the fact that most parents use childcare for work-related reasons. Therefore, parents' preferred type of childcare is likely to be whatever arrangement can best accommodate their working hours. In some cases, this may be long day care or family day care. In other cases, it may be easier to employ the services of a relative or a babysitter, especially where parents are working short or irregular hours.

Impact of childcare on working hours

Questions 4-6 probed the relationship between childcare and parents' working hours. Overall, almost three out of four mothers (74%) reported that childcare has at a large or moderate impact on their working hours. In contrast, just one in 10 mothers reported no impact on their working hours.

The impact on partners' working hours was much less. Almost four in 10 working mothers in relationships (39%) reported that childcare has no influence on their partners' working hours. This was more likely to be the case in higher income families (46% of households earning \$150k+ per year), than lower income families (27% of households earning \$50-\$99k per year).

This could suggest that higher income families have more childcare options available to them, such as employing a nanny or using a more expensive childcare centre. In contrast, lower income families are likely to have fewer affordable options. This could mean that lower-income parents are more likely to reduce their working hours in order to care for their children, in the absence of affordable or available childcare.

The other implication could be that lower-income parents, working casual hours or doing shift work, have more capacity to vary their working hours in comparison to parents in full-time employment.

Significantly, almost half of all working mothers (46%) said they would be able to work more hours if childcare was more affordable. This is significant from a policy perspective, given the focus of governments on boosting the workforce participation of parents.

It must be noted that a significant minority of working mothers (25%) said greater affordability would have the opposite effect. That is, if childcare was more affordable, they would not have to work as much (Figure 6).

While it is difficult to draw clear conclusions, these results suggest at the very least that mothers are not homogenous when it comes to their family/work preferences.

For example, if financial pressures were lower, some working mothers might prefer not to work at all and instead care full-time for their children. This is a strong possibility, as a significant proportion of Australian mothers with young children are not in the workforce, despite strong government incentives to do so. Moreover, parents with babies tend to prioritise direct care-giving and are less likely to use childcare.¹⁹

Other mothers, who wish to work, may find it difficult to work for their preferred number of hours. Given the high cost of long day care, for example, some mothers may need to work extra hours in order to be able to afford childcare. Some mothers may prefer to work only one or two days a week but would see little or no financial benefit from doing so because of reduced childcare subsidies and welfare benefits and increased taxes. This may be their motivation to work extra days or more hours.

In other words, the problem for some mothers may be circular: they may need childcare so they can go to work, but they may need to work more than the preferred number of hours in order to generate any significant financial benefit from working.

More generally, the results of Questions 4-6 indicate that childcare still has a far greater influence on the working decisions of mothers than fathers/partners. Therefore, it is especially important to understand the priorities of mothers in relation to childcare.

Figures 4 & 5: To what extent does the availability and affordability of childcare affect parents' working hours?

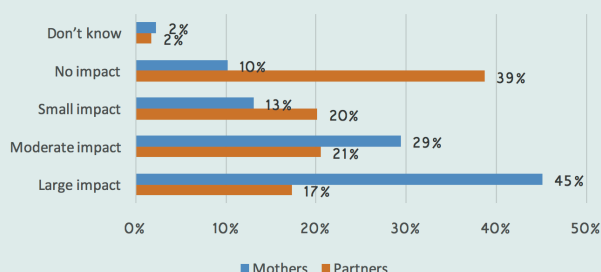
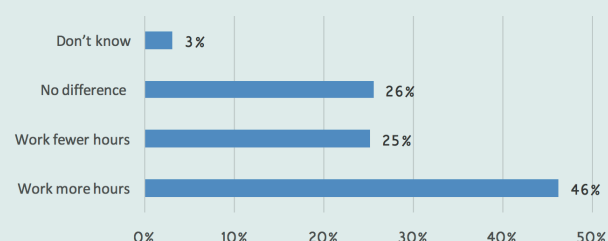


Figure 6: If childcare was more affordable and flexible, how would this affect your working hours?



Implications for governments

These survey insights into the childcare preferences and priorities of working mothers give rise to some key implications for governments in Australia which are summarised in the following analysis.

Priorities of parents and governments do not align

First, there is arguably a misalignment between governments and parents when it comes to priorities for childcare. Mothers tend to prioritise the wellbeing of their children, as indicated by nominating 'warmth of care-giving' as their most important priority. The other top priorities relate to practical considerations of cost and location rather than the regulated 'quality' aspects of childcare, as indicated by staff credentials and early learning. This misalignment in priorities is further evidenced by the fact that parents have low awareness of the National Quality Framework. Governments should re-assess the value of the National Quality Framework and particularly the staffing rules (qualification requirements and staff-to-child ratios) that drive up the cost of formal childcare.

Unlike governments, parents view formal and informal care as substitutes

Secondly, parents view informal childcare as a substitute for formal childcare, in contrast to governments which treat formal and informal childcare very differently. Parents are likely to hold this view because using informal care can equally facilitate their participation in the workforce. In fact, informal care could be a more practical and flexible option for some parents who work part-time or irregular hours.

The majority of parents use childcare for work-related reasons; therefore, it is logical that parents would prefer to use whatever childcare arrangements (formal or informal) can best accommodate their working hours. However, government policy does not encourage this flexibility. Even though the Child Care Subsidy is designed to support working parents, eligibility to claim the subsidy is generally limited to parents who use regulated formal childcare (unless exceptional circumstances apply).

Working parents have different preferences and support subsidies for informal care

Thirdly, working parents do not have homogenous preferences in relation to childcare – and may be constrained in their choice of childcare. The survey results indicate that using formal childcare does not always reflect the preferred option of mothers. Some mothers who use formal childcare would prefer to use informal childcare, if it was an available and affordable option.

Related to this point, working mothers also supported the option of using subsidies to pay for informal childcare and supported the idea even if it meant receiving a lower subsidy overall. However, under the current subsidy system, parents who use informal childcare are generally ineligible to claim the Child Care Subsidy.

This is because the subsidy is not just aimed at supporting workforce participation. It is also designed to encourage parents to use regulated childcare that delivers early learning services. When the new Child Care Subsidy was introduced, the federal government described the subsidy as an investment which provides "access to quality early learning opportunities".²⁰

Childcare affects parents' working hours but not always in the same way

Lastly, the survey results indicate that childcare affordability and availability have at least some impact on mothers' working hours. This is significant because a key policy objective of the Child Care Subsidy is to encourage parents to work more hours. However, while the majority of working mothers said that more affordable childcare would encourage them to work additional hours, a substantial proportion said it would, in fact, have the opposite effect. That is, if childcare was more affordable, they would not have to work as much.

This is evidence of the varied views of working mothers; it cannot be assumed that all working mothers would prefer to work more hours if childcare was more affordable. The workforce participation of parents is unlikely to be infinitely elastic; that is, childcare subsidies are likely to have a limit in terms of incentivising parents to work longer hours. This could affect the efficiency of the subsidy system. Beyond a certain point, subsidies may have little effect in boosting parents' working hours and may simply benefit parents who would work long hours regardless of incentives.

Should governments support informal childcare?

Given the findings of the survey, is there a policy case for offering subsidies to families who use informal childcare? In principle, governments should adopt policies that maximise individual choice and autonomy, including for families. Providing financial assistance for informal care would potentially give parents greater choice – and represent a more consistent way to support parents' participation in the workforce. Even if governments wish to encourage parents to work, there is still a strong case for governments to remain neutral about parents' choice of childcare.

In practice, the lack of regulatory oversight and risk of rorting would make it difficult to offer subsidies for informal childcare. Similarly, bringing informal care such as nannies into the regulated childcare system would further drive up the cost of providing this sort of childcare. From an efficiency perspective too, it would be difficult to justify offering financial assistance to family members who provide care. If individuals are willing to provide childcare free of charge, then it is

likely to be economically inefficient – and potentially pointless – for the federal government to offer financial assistance.

However, the government should at least acknowledge the importance of informal childcare in providing parents with a more flexible alternative to formal care. This supports their participation in the workforce, which is entirely consistent with the government's own objective.

Conclusions

The polling by YouGov reveals some key insights into working mothers' preferences and priorities for childcare. In particular, the polling shows that some working mothers would prefer to use informal care, even though they currently rely on formal childcare. Related to this, working mothers tend to view formal and informal childcare as substitutes, expressing support for the idea of extending subsidies for informal childcare.

In selecting childcare, mothers tend to prioritise warmth of care-giving, location and cost rather than the regulated aspects of formal childcare such as early learning and staff credentials. The majority of mothers also reported that childcare affordability and

availability have at least some impact on their working hours; however, this was less likely to be the case for their partners. At the same time, some mothers indicated they would choose to work fewer hours if childcare was more affordable.

Together, these survey results highlight a misalignment between the priorities of parents and governments – as well as the simple fact that parents have different preferences when it comes to childcare arrangements. Federal and state governments should therefore consider ways that the childcare funding and regulatory system can better facilitate choice for parents – including for parents who may prefer to use informal childcare.

Appendix

The YouGov Galaxy poll surveyed 521 working mothers, with children aged from newborn to five years, who were using a form of childcare (for example, long day care or family day care). Mothers with children in this age group were surveyed because child care needs can be particularly high for children who have not yet started school.

These mothers were asked a number of questions, regarding their priorities and preferences in relation to childcare. They were also asked for their opinions on government subsidies for childcare; and the impact of childcare on their working hours and those of their partners.

The survey was targeted at *mothers specifically*, as having young children is more likely to affect the workforce participation of mothers than fathers. Around 37.6% of women with a dependent child aged 0-5 are not in the workforce, compared to just 6.1% of men with a child.²¹ Furthermore, three in five (61%) employed women with a child aged 0-5 work part-time hours, compared to fewer than one in ten employed fathers (7.9%).²²

The survey sample was confined to mothers *who are in the workforce*. While some non-working mothers use childcare too, the federal government's childcare subsidy system is specifically designed to support mothers who are working or want to work more hours.

Over two-thirds (70%) of the mothers who were surveyed reported that they were based in a capital city, with the rest responding that they lived outside in a regional area.

Of the 521 mothers, 87.5% claimed to hold post-school qualifications; 57% had university degrees and just under 30% had graduated from a TAFE or other similar institution.

The respondents were divided almost equally into full-time and part-time workers.

Over 80% were aged 30 and older, with the rest aged under 29.

With regard to household income, 9.4% reported earnings of less than \$50,000 per annum. Household income of between \$50,000 and \$99,000 was reported by 33.5% of mothers, 33.7% reported income between \$100,000 and \$149,000, and 17% had an income of more than \$150,000.

Figure 1: If the following options were fully affordable and available to you, what would be your preferred types of childcare?

Top 1 preferred type of childcare	
Long day care	50%
Family day care	15%
Nanny/ babysitter	10%
Grandparent/ relative/ friend	25%

Top 2 preferred types of childcare	
Long day care	73%
Family day care	45%
Nanny/ babysitter	29%
Grandparent/ relative/ friend	53%

Top 3 preferred types of childcare	
Long day care	85%
Family day care	76%
Nanny/ babysitter	58%
Grandparent/ relative/ friend	82%

Figure 2: When you are selecting a formal childcare service, how important are each of the following things?

Top 1 important factor in selecting childcare service	
Location	18%
Word-of-mouth reputation	12%
Cost	15%
Flexible hours of care	12%
Early learning	10%
Warmth of care-giving	24%
Staff credentials	9%

Top 2 important factors in selecting childcare service	
Location	40%
Word-of-mouth reputation	23%
Cost	30%
Flexible hours of care	24%
Early learning	24%
Warmth of care-giving	42%
Staff credentials	18%

Top 3 important factors in selecting childcare service	
Location	56%
Word-of-mouth reputation	33%
Cost	48%
Flexible hours of care	36%
Early learning	34%
Warmth of care-giving	60%
Staff credentials	32%

Figure 3: Do you agree or disagree with the following statement? “I would prefer to be able to use some of the government subsidies I currently receive for formal childcare, for informal childcare (from grandparents, relatives, nannies, and others etc.) even if this meant I received less in government subsidies overall.”

Strongly agree	31%
Somewhat agree	35%
Somewhat disagree	17%
Strongly disagree	8%
Don't know	8%
Subtotal: Total agree	66%
Subtotal: Total disagree	26%

Figure 4: To what extent does the availability and affordability of childcare influence how many hours you work?

Childcare has a large impact on the number of hours I work	45%
Childcare has a moderate impact on the number of hours I work	29%
Childcare has a small impact on the number of hours I work	13%
Childcare has no influence on the number of hours I work	10%
Don't know	2%

Figure 5: To what extent does the availability and affordability of childcare influence how many hours your partner works?

Childcare has a large impact on the number of hours my partner works	17%
Childcare has a moderate impact on the number of hours my partner works	21%
Childcare has a small impact on the number of hours my partner works	20%
Childcare has no influence on the number of hours my partner works	39%
My partner does not work	2%
Don't know	2%

Figure 6: If childcare was more affordable and flexible, which statement would best apply to you?

I would be able to work more hours as I could afford the extra childcare	46%
I would not need to work as many hours, to cover the cost of childcare	25%
It would make no difference to my working hours	26%
Don't know	3%

Endnotes

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Related works

Eugenie Joseph, *Why childcare is not affordable* (August 2018), the Centre for Independent Studies.

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