



Australian Childcare Alliance

Representing the future of Australia's children



ACA MEMBER SURVEY 2014

*Have your say on the Productivity Commission
Inquiry into Childcare and Early Childhood*



Australian Childcare Alliance



- The Australian Childcare Alliance (ACA) represents 70% of all private long day care centres across Australia and its staff who care for more than 400,000 children.
- n= 362 respondents across Australia of centre owners who operate a long day care centre (private or community)
- Survey conducted between 24 January 2014 – 31 January 2014
- Variations of +/-1% in reported percentages are due to rounding

Key Findings



Occupancy

Respondents indicated that estimated overall occupancy levels for the week beginning 3 February 2014 were 75%.

Vacancies as a percentage of overall occupancy by age

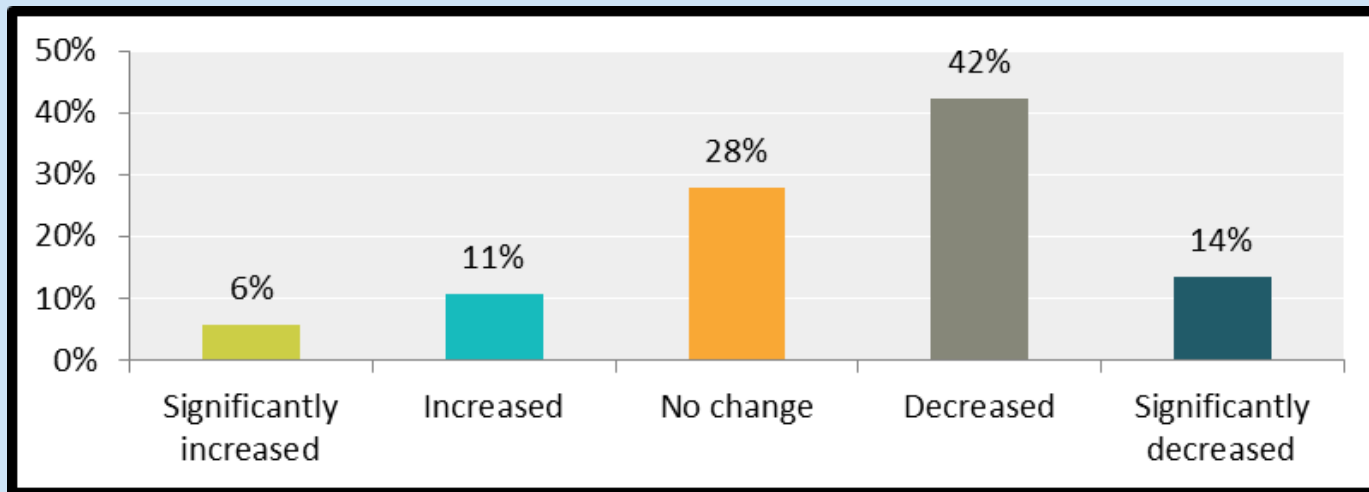
Day	0-2 age group	2-3 age group	3-5 age group
Monday	32%	32.9%	37.2%
Tuesday	25.7%	25.5%	28.9%
Wednesday	26%	26.8%	27.6%
Thursday	25.1%	25.7%	27.4%
Friday	30.4%	30.3%	33.3%

Note: Due to child to staff ratios the actual number of vacancies in older age groups is higher relative to lower age groups

Key Findings



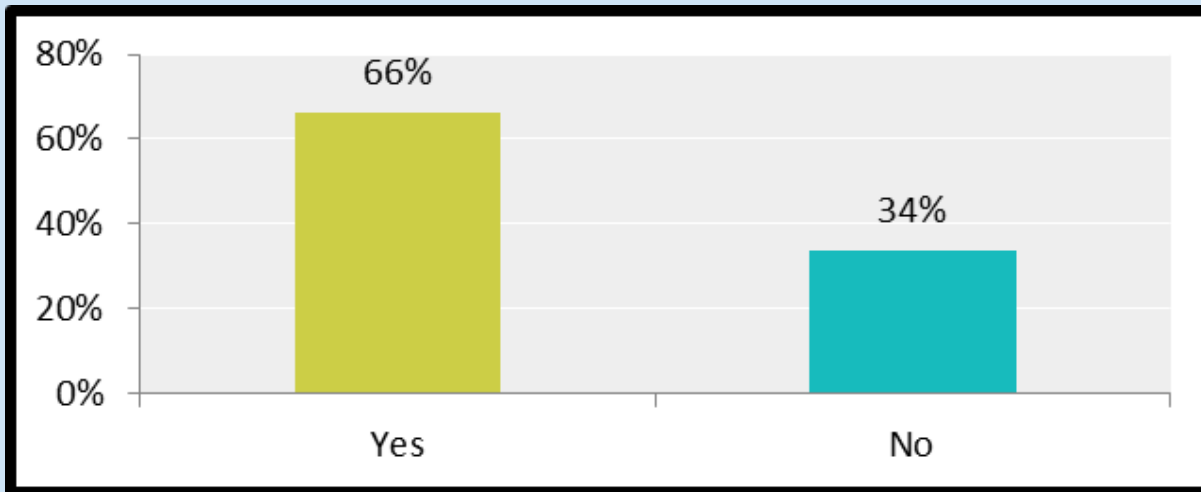
- 64% of providers believe that since the introduction of the NQF, educators' time with children has decreased.



Key Findings



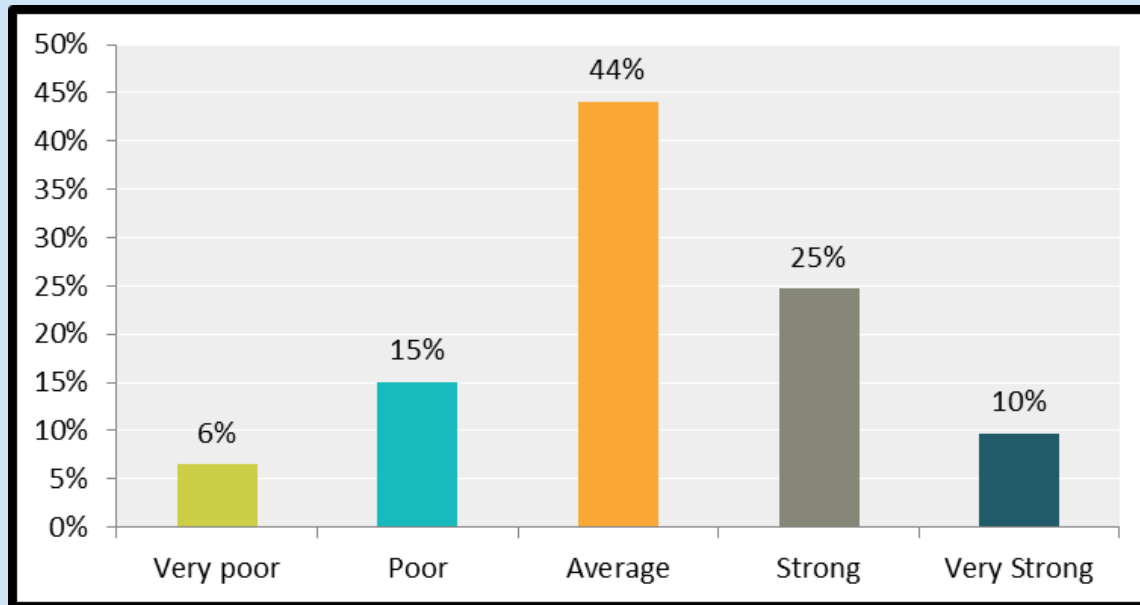
- 66% of respondents indicated that they have passed additional costs from the NQF to families in the form of higher fees.



Key Findings



- 65% of providers indicated their 'business health' in 2014 would range from very poor to average highlighting ongoing concerns regarding viability issues.



Key Findings



- Provider views about 2014 business health compared to 2013

Perception of viability compared to 2013	
Sentiment	Percentage
It is improving and I am positive about the future	12 %
It is improving; however I am cautious about the future	14 %
It is stable and I am positive about the future	16 %
It is stable and I am neither positive nor negative about the future	10 %
It is stable; however I am cautious about the future	26 %
It is declining but it is likely to recover	5 %
It is declining and I am concerned about the future	17 %

Key Findings



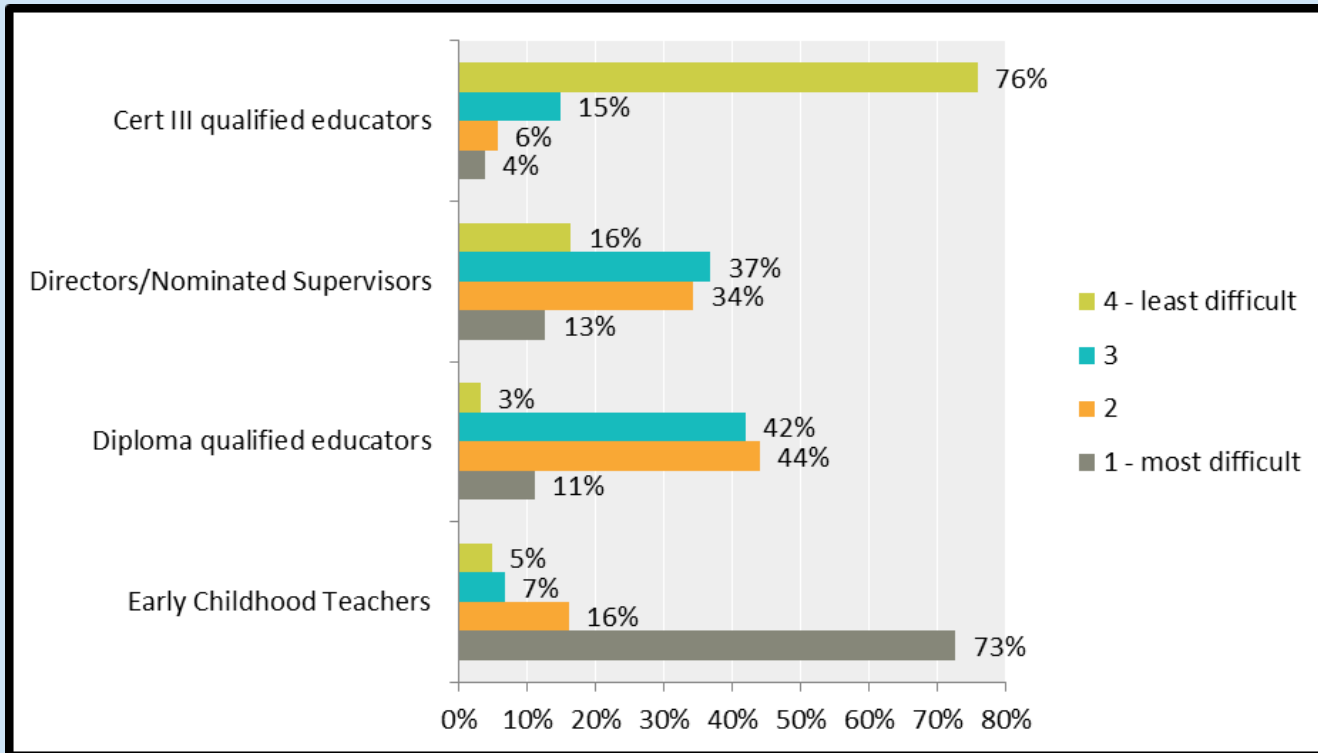
- There is a high degree of variability in the views of providers on the contribution of the the NQF to improving outcomes for children.

Aspects of NQF and Outcomes for Children					
	Strongly agree	Agree	Disagree	Strongly disagree	Undecided
Increased staff ratios (that is, more staff to children) have resulted in better outcomes for children	17%	36%	27%	10%	11%
Higher staff qualification requirements have resulted in better outcomes for children	14 %	35%	31%	15%	5%
A stronger focus on programming and documentation has resulted in better outcomes for children	11%	35%	31%	16%	8%

Key Findings



- 73% indicated that early childhood teachers continue to be the most challenging aspect of recruitment.



Key Findings



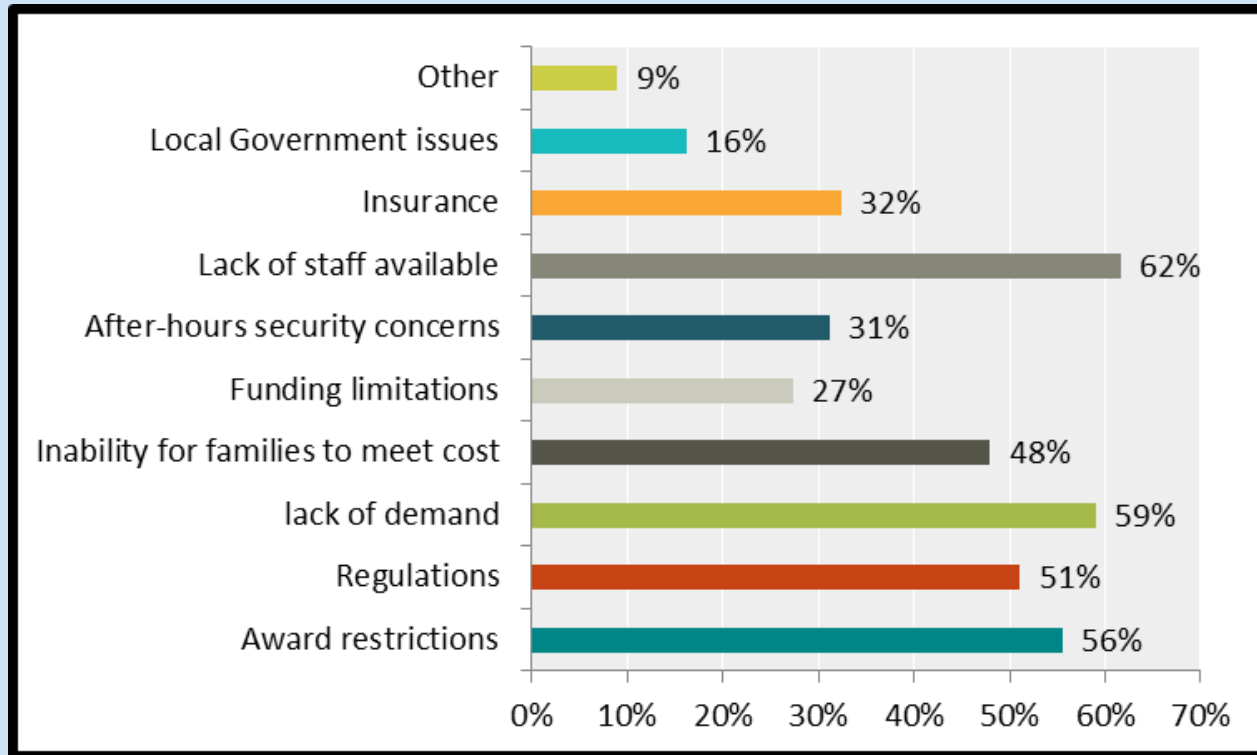
- 71% of respondents do not offer flexible options with providers reporting requests for flexible care in the following categories:

Flexibility of care	Percentage
Flexibility to swap/add/change days	96%
Part days	82%
Hourly care	54%
Before and after-school care	54%
Weekend care	26%
Overnight care	14%

Key Findings



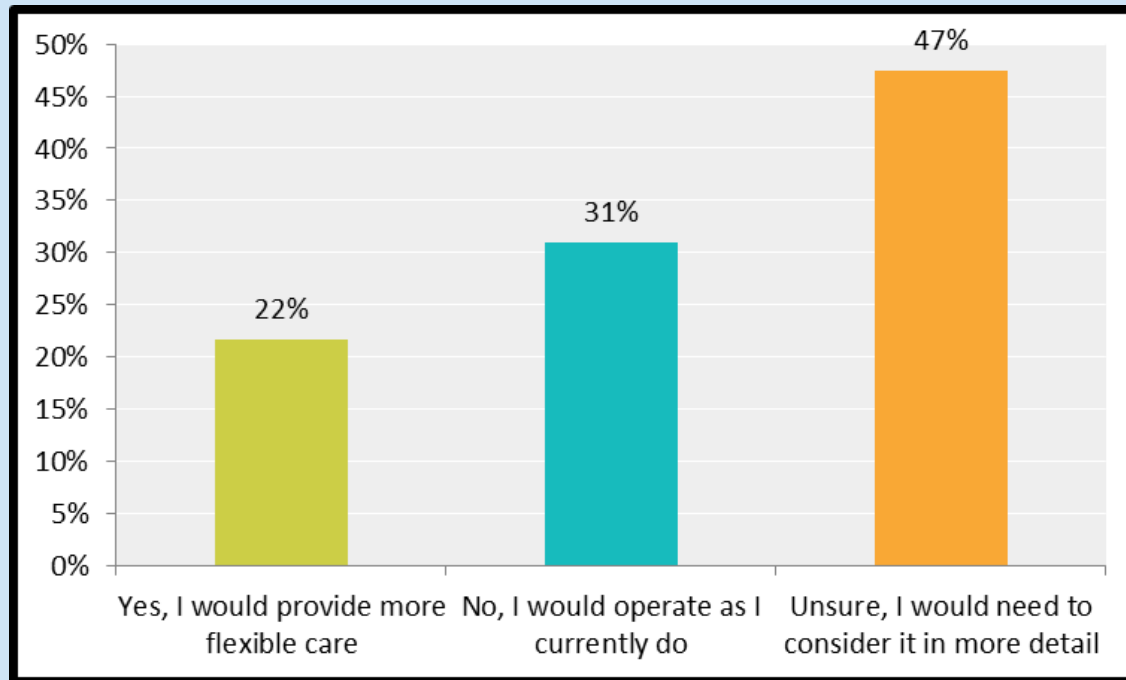
- Lack of available staff, award restrictions and lack of demand are the key barriers preventing providers from offering more flexible care.



Key Findings



- 22% indicated that they would provide more flexible care to meet the needs of families if the barriers to providing more flexible care arrangements were overcome



Key Findings



- Respondents indicated that 62% of their turnover can be attributed to wages/salaries including on-costs.
- 81% indicated that up to 40% of families attending their service experienced difficulties in paying their fees during 2013.
- 31% indicated that NQF resulted in changes to the number and/or mix of children in their service.
- 66% compete with services in their local area based on price.
- 85% compete with services in their local area based on quality of service.
- 85 per cent of respondents indicate price competition has, at some time, prevented the passing on of increased costs, with 32 per cent reporting that it occurs on a regular or very regular basis.
- 52% indicated that price competition with other providers often/very often/sometimes prevents them from investing in initiatives to improve quality

Key Findings



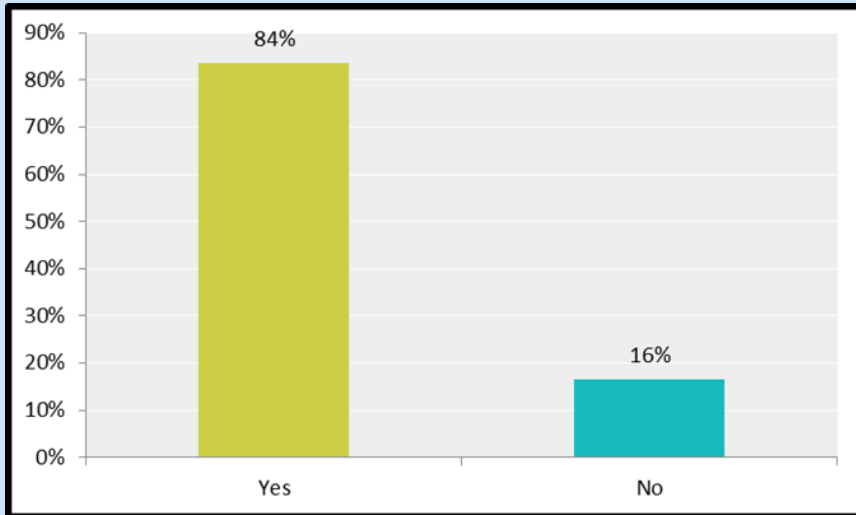
- The majority of respondents indicated that they have found inconsistencies and red tape burden in implementing areas of the NQF, especially the Assessment and Rating Process.

Inconsistencies and red tape in implementing areas of the NQF		
	Yes	No
Health and Safety	54%	46%
Physical Environment	54%	46%
Sustainability	56%	44%
Programming and Documentation	67%	33%
Compliance and Enforcement	67%	33%
Assessment and Rating Process	68%	32%

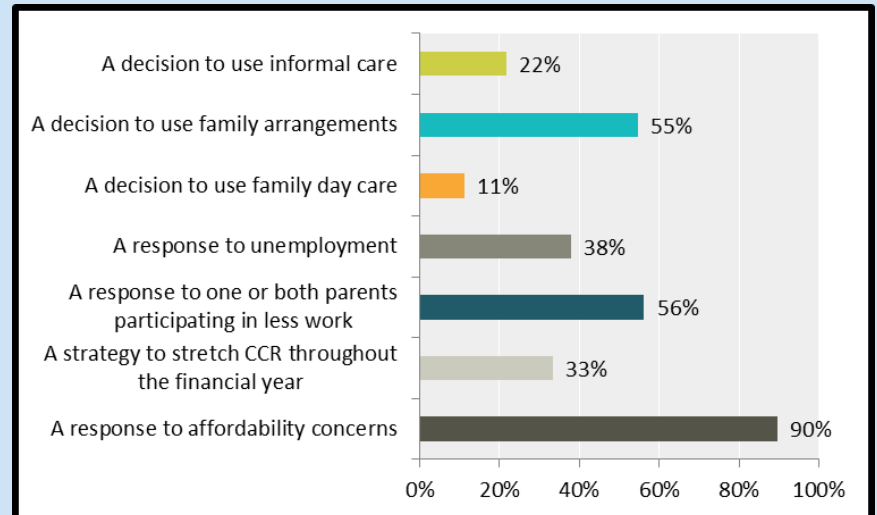
Key Findings



- 84% indicated that families attending their service are using more part time care arrangements



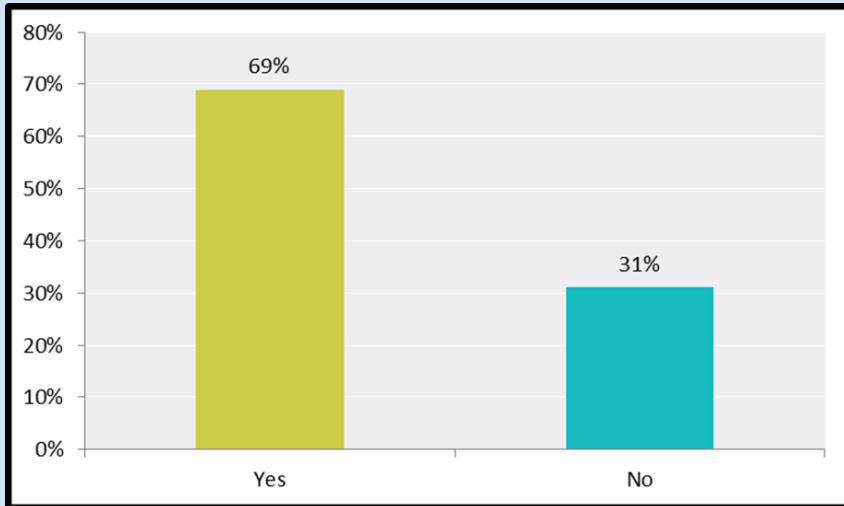
- 90% of those who said yes, indicated that the primary reason reported by the families making these changes is concerns for affordability



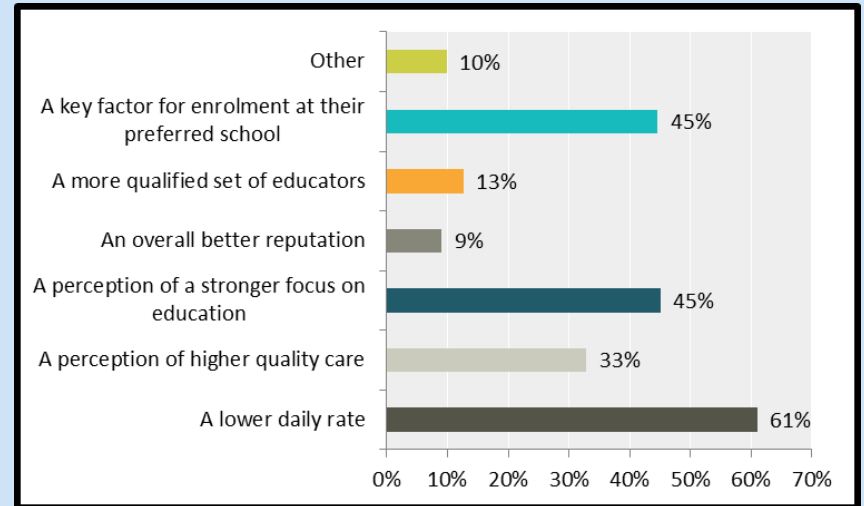
Key Findings



- 69% reported that families with preschool aged children leave their service for an alternative in the year prior to school



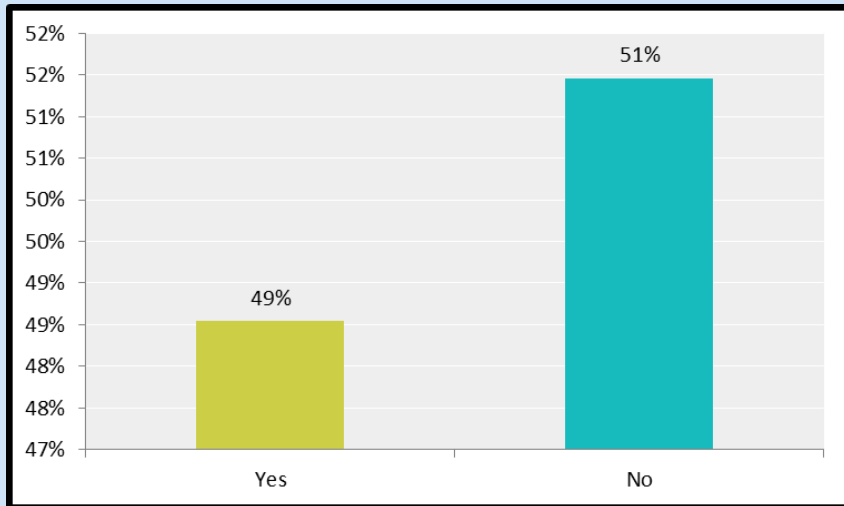
- Those who said yes indicated that the most common reason parents made this choice is the lower daily rate of the alternative option



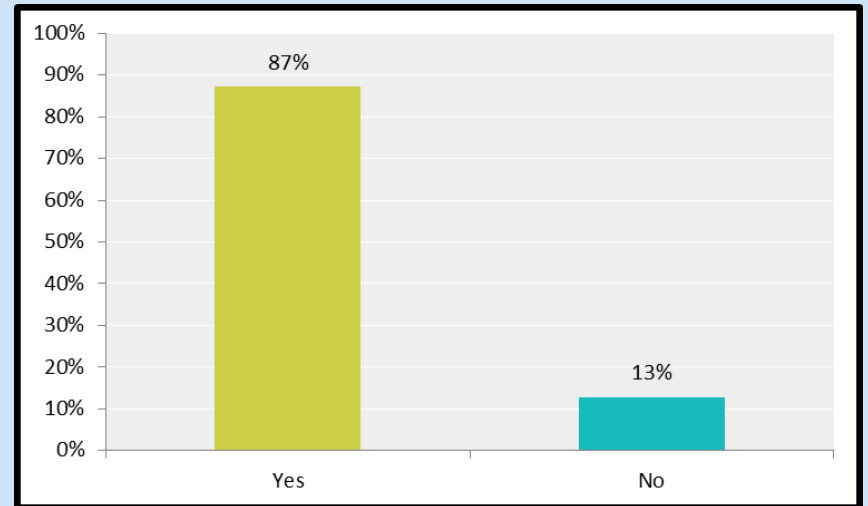
Key Findings



- 51% indicated that their service is not funded under The National Partnership on Early Childhood Education (NP ECE) to provide kindergarten or preschool program

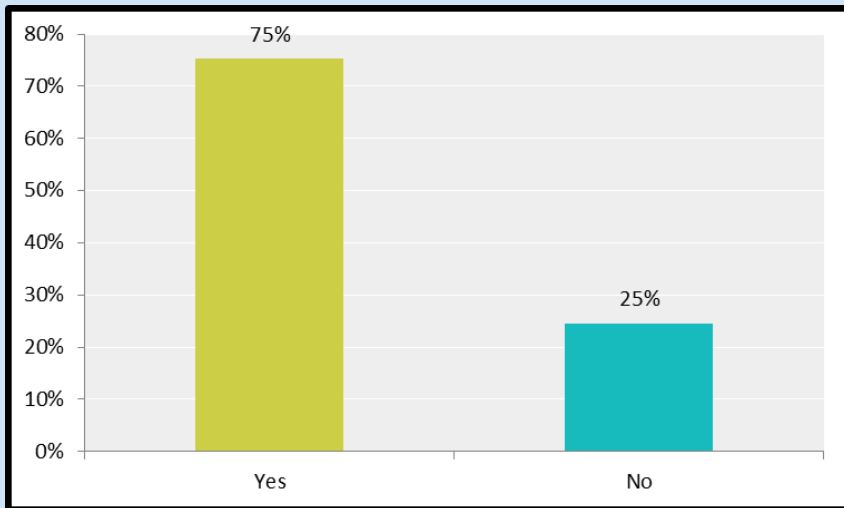


- 87% of those who said no would provide a kindergarten or preschool program if funding was available to their service

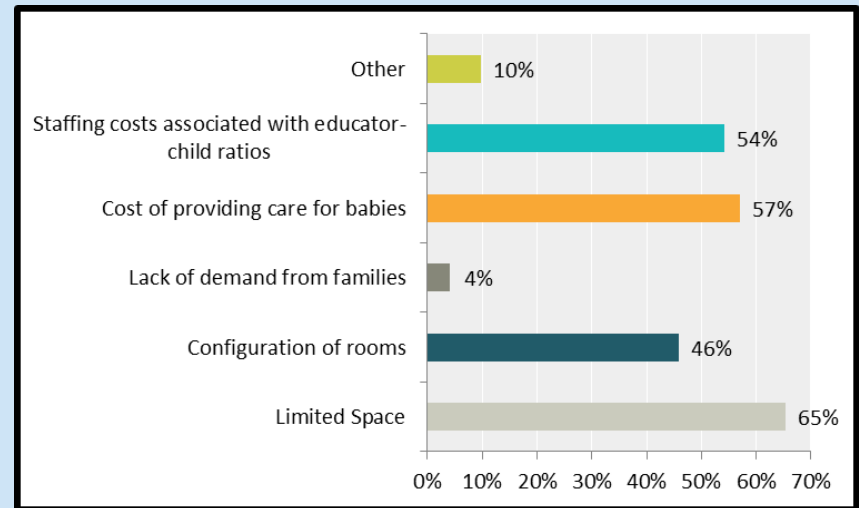


Key Findings

- 25% of respondents do not provide care for babies at their service



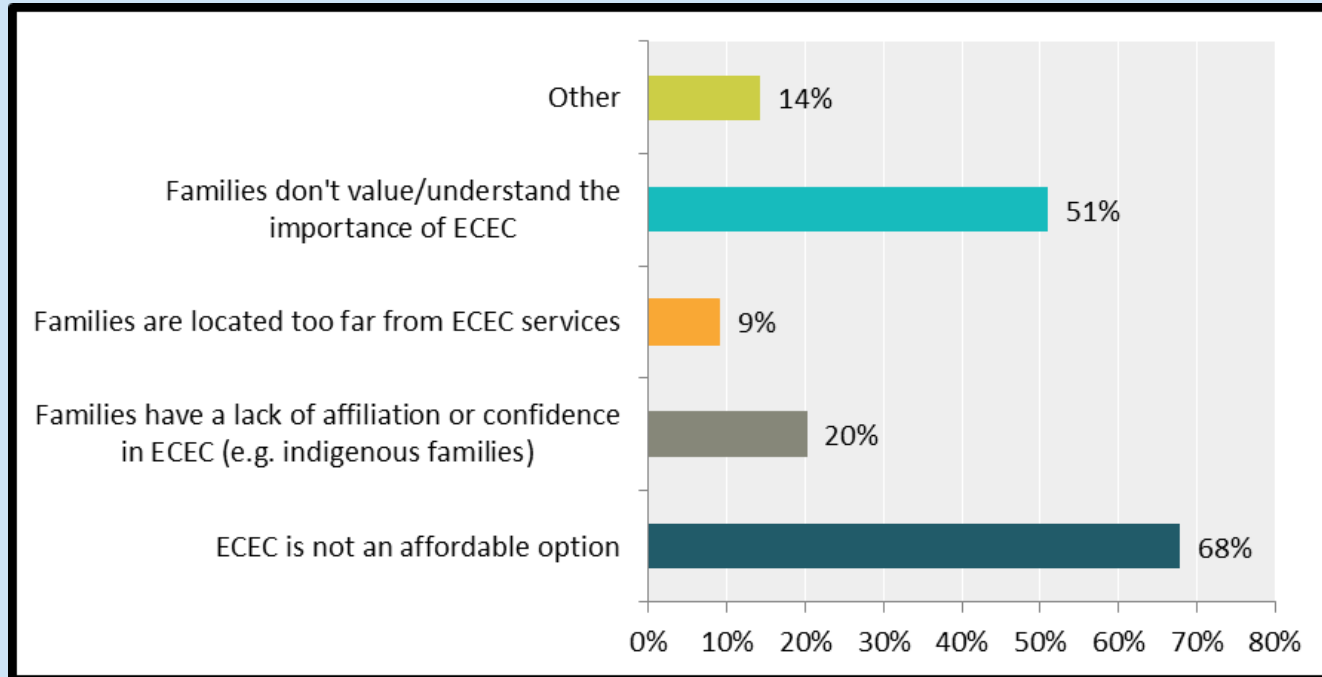
- The main barrier preventing care for babies is space limitations and the cost of providing care to babies



Key Findings



- The main barrier preventing vulnerable and disadvantaged children in the community attending the ECEC service is the affordability issues





Contacts



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