



City of Sydney **Child Care Needs Analysis 2019**

October 2019



Families At Work
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Abbreviations & Glossary

ABS	Australian Bureau of Statistics
ACCS	<u>Additional Child Care Subsidy</u> is a payment from the Australian Government providing additional fee assistance to support eligible families experiencing vulnerability or disadvantage to access early child education and care or outside of school hours services. There are four different payments under Additional Child Care Subsidy – Child Wellbeing – to help children who are at risk of serious abuse or neglect; Grandparent – to help grandparents on income support who are the principal caregiver of their grandchildren; Temporary Financial Hardship – to help families experiencing financial hardship; and Transition to Work – to help low-income families transitioning from income support to work
ACECQA	<u>Australian Children's Education and Care Quality Authority</u> is an independent, national statutory body whose role is to assist governments administering the National Quality Framework for children's education and care
AEDC	<u>Australian Early Development Census</u> is a national measurement of child development for children when they first start primary school
AGP	<u>Accommodation Grants Program</u> is a program where the City of Sydney leases some of its community facilities/spaces at low or no cost to organisations that provide services that meet the City's identified strategic plans and policies, such as enabling access to children of families experiencing vulnerability or disadvantage
AI	Artificial intelligence
AIFS	Australian Institute of Families Studies
AITSL	<u>Australian Institute for Teaching and School Leadership</u> is a national organisation whose role is to promote educational excellence including accreditation of initial teacher education programs in tertiary institutions
ASX	Australian Securities Exchange
BASC	<u>Before and/or after school care</u> is a type of formal care provided for primary school age children before and/or after school during the school term; often school-based or in community facilities, charging a fee for regular or casual care
BCA	Building Code of Australia
CBD	Central business district
CCB	<u>Child Care Benefit</u> was a means tested sliding scale payment from the Australian Government to help families meet the cost of child care. The Child Care Benefit ceased on 30 June 2018 and was replaced by the Child Care Subsidy

CCR	<u>Child Care Rebate</u> was a non-means tested payment from the Australian Government that covered 50% of a family's out of pocket child care expenses, excluding Child Care Benefit up to an annual limit of \$7,613 per child. The Child Care Rebate ceased on 30 June 2018 and was replaced by the Child Care Subsidy
CCS	<u>Child Care Subsidy</u> commencing on 1 July 2018, is a payment from the Australian Government to help families better afford child care. It replaces both the Child Care Benefit and Child Care Rebate. Eligibility is based on annual family income up to \$352,453; amount of work activity, and type of child care used
COAG	<u>Council of Australian Governments</u> is the peak intergovernmental forum comprising the Prime Minister, state and territory First Ministers and the President of the Australian Local Government Association
DA	Development Application
DCP	<u>Development Control Plan</u> is a supplementary guideline that supports a council's Local Environmental Plans. It has specific controls to guide particular types of developments within certain specified areas
ECEC	<u>Early childhood education and care</u> generally describes formal child care used by children aged from birth to five years before the child starts school
ECT	<u>Early childhood teachers</u> are degree qualified teachers with specialist qualifications to work with children aged from birth to around eight year of age. Qualifications are approved by the Australian Children's Education & Care Quality Authority
ERP	<u>Estimated Resident Population</u> is the official population of the area. It is updated annually by the Australian Bureau of Statistics, and reassessed every Census
FAW	Families At Work
FDC	<u>Family day care</u> is a type of formal care provided in the home environment of a registered carer
LDC	<u>Long day care</u> is regulated formal centre-based care providing all-day or part-day education and care for children. Long day care centres must follow an approved national curriculum to deliver an educational program that is reviewed under the National Quality Framework and Standard, and employ appropriately qualified staff
LGA	Local government area
MEYP	<u>Municipal Early Years Plans</u> are plans developed by Victorian local councils to provide strategic direction for programs of activities that primarily focus on children from birth to eight years
NESA	<u>NSW Education Standards Authority</u> is a state entity that has oversight for the registration and accreditation of early childhood teachers
NQF	<u>National Quality Framework</u> provides a national approach to regulation, assessment and quality improvement for early childhood education and care and outside school hours care services across Australia
NQS	<u>National Quality Standard</u> provides a national benchmark for early childhood education and care, and outside school hours care services in Australia where services are assessed and rated against the Standard, and given a rating for each of the seven quality areas and an overall rating based on these results
OSHC	<u>Outside school hours care</u> is regulated formal centre-based care provided for school aged children before school, after school, during school holidays and on pupil free days

SDG	<u>Sustainable Development Goals</u> are 17 global goals developed by the United Nations and adopted by world leaders in 2015 that focus on achieving a more sustainable future for everyone. The implementation target is by 2030. Goals include quality education, gender equality, and decent work and economic growth
SEPP	<u>State Environment Planning Policies</u> are environmental planning instruments determined by the NSW Government which address planning issues within the State. SEPPs most often nominate the Planning Minister as the decision maker for the types of development they relate to
UTS	University of Technology Sydney
VPA	<u>Voluntary planning agreement</u> is an agreement entered into by a developer and a planning authority, such as a local council, where a developer agrees to provide/fund social infrastructure or amenities
WALE	<u>Weighted average lease</u> is a measurement of vacancy risk averaging the period where all leases in a property will expire

Executive Summary

The City of Sydney's *Child Care Needs Analysis 2019* provides a current picture of the supply and demand of early childhood education and care (ECEC) and outside school hours care (OSHC) in the City of Sydney, and a forecast of demand to 2036. It includes a comprehensive review of the barriers and enablers for ECEC and OSHC. This is an update to the City's *Child Care Needs Analysis 2013*.

It includes both anticipated trends, and opportunities for the City of Sydney to consider as a provider, facilitator and influencer of decisions and services to meet the needs of children in the City of Sydney. The study also shows detail across the City's 10 Village areas.

The study outcomes show that overall, the supply of ECEC is meeting the demand, with only minor shortfalls predicted to 2036. Some Villages areas show an undersupply, and some show a small oversupply. These findings are consistent with findings from an online survey of child care users in the City of Sydney, conducted as part of this study, and feedback from service providers. The supply of OSHC currently exceeds demand and may continue to do so in 2036; although there are pockets of local under supply.

The City's response to the *Child Care Needs Analysis 2013*

The City recognises the integral role of ECEC for the community as an enabler of workforce participation as well as the benefits of education and care before children begin formal schooling.

The 2019 study shows a different landscape for ECEC than when the last study was completed in 2013. In 2013 there was a significant undersupply of ECEC places for children in the City of Sydney local area, with this trend predicted out to 2031, unless intervening action was taken to change this outcome.

In response to the 2013 report's recommendations, the City took decisive action in order to increase the supply of child care places in the local area including a capital works program to construct four new ECEC services. These new centres, now operated by a not for profit organisation, have provided a combined total of almost 300 full-time child care places in the City of Sydney.

Since 2013, the City has also influenced child care supply through its strategic planning function. Discussions and negotiations with developers for the supply of ECEC services has resulted in a new service to be provided at 505-523 George Street Sydney, as well as child care included as a deed of sale for the Fig & Wattle site in Ultimo.

Overall, 2,798 child care places were completed as part of development activities between June 2013 and June 2018. This represents a 58 per cent increase in child care places. The residential population has increased by 19 per cent over this time, and the workforce has increased by approximately 13 per cent over this time.

Role of Local Government

Local governments are well-placed to understand and meet the diverse needs of their local community through oversight and funding of infrastructure and facilities.

The City of Sydney performs a range of functions which influence the supply of child care, including its role as a strategic land use planner and assessor of development applications, as an enabler, a direct provider or landlord and most importantly as a whole of community strategic planner. The City of Sydney provides approximately 15 per cent of ECEC places in the local area. It is a direct provider for ten children's services including long day care, kindergarten, occasional care, after school care, and vacation care. In addition, the City is a landlord for 21 facilities through the Accommodation Grants Program, commercial leases and work-based child care.

Strategic Planning

In 2017, the *State Environmental Planning Policy (Educational Establishments and Child Care)* (SEPP) came into effect. This SEPP overrides many aspects of the City's *Sydney DCP 2012, Section 4.4.4 Child care centres*. It is recommended the City explore opportunities to create a best-practice guideline that will help ensure better quality environments for child care services. This guideline could build on the general advice in the SEPP and respond to issues currently not addressed; for instance, with more specific goals for optimum built environments, interactions between spaces, child age break ups and maximum numbers of children, and above ground floor facilities.

Supply

ECEC services

As at June 2018, the City of Sydney had 146 services providing a total of 6,585 places for long day care, 416 preschool places.

This report shows that many of the ECEC services within the City are of good quality, rated Meeting or Exceeding National Quality Standard as part of the National Quality Framework.

Feedback from parents, captured through an online survey with 570 respondents, indicated that 82 per cent of respondents are using their preferred child care. However survey findings did indicate problems around affordability, flexibility and opening hours not matching demands of some workers.

The online survey findings showed the quality of care provided was a very important consideration for parents when choosing a child care service, along with the location (being close to home) and the quality of the educational program provided. The majority of respondents were using child care to enable participation in the work force.

The affordability of ECEC services was reported as a key concern for many respondents, with 59 per cent rating their fees as either 'Fairly expensive' or 'Prohibitive'.

Comments in the parents' survey also indicated many people were experiencing issues with the hours of child care not meeting their employment needs; particularly shift workers, those working longer hours in an office, or those who had to commute to work.

OSHC services

In June 2019 there were 31 OSHC services providing a total of 2,475 places in the City of Sydney, including before school care, after school care and vacation care. Research undertaken through this study showed that after school care services for 10 primary schools located in the local area were full, with waiting lists. The greatest demand for after school care was in the Villages of Green Square, Chinatown & City South, and Harris, King and Oxford Streets. The demand is less for before school care.

Comments reported in the parent survey indicated that the lack of after school care was a concern for many families, with some families having to stretch the limits of their flexible work practices, and others not understanding why schools do not offer OSHC places that match the necessary demand. It is anticipated more OSHC services will be provided on-site as part of the redevelopment and upgrades of a number of schools in the City of Sydney area, currently being planned or delivered by School Infrastructure NSW.

It is recommended the City continues to advocate for well-located after school care to meet the needs of families in the area.

Demand

The *Child Care Needs Analysis 2019* uses a refined methodology to calculate demand. This is based on data from the Australian Bureau of Statistics (ABS) to calculate the population of resident children and the use of formal care, as well as unmet demand where families are seeking some or greater access to care.

The same methodology is applied for the children of non-resident workers in the City of Sydney, with modifications to the population dataset, described later in this report.

In 2018 the City of Sydney had an estimated resident population (ERP) of approximately 240,000 people. This is expected to grow by approximately 100,000 residents to 340,000 in 2036; an increase of 40.9 per cent. All City Villages are predicted to have an increasing population in the period 2018 to 2036, with Green Square, Chinatown & City South, and CBD & Harbour more than doubling in population.

Although the proportions of families with children is expected to stay the same at around 15 per cent, the overall increase in population of children aged from birth to four years and five to 12 years will see a continued demand for ECEC and OSHC.

In addition, as a major Central Business District and employment hub, the demand from workers for child care has a significant impact on demand for services in the City of Sydney. The number of workers is set to increase from 389,927 in 2016 to 512,906 by 2036.

While estimates identify there being significant unmet demand in the CBD, research has indicated that occupancy is low in many child care centres across the CBD.

Given the large numbers of existing and anticipated workers within the City local area, this report has identified a need to undertake more detailed investigations to understand the barriers and drivers for child care for the worker population.

It will be important for the City of Sydney to monitor local usage and national trends, as well as future development applications for child care centres, on a regular basis, in order to understand any changes to supply and demand.

Promoting access for all

Consistent with the findings of the 2013 study, this report highlights the critical role of the City of Sydney in enabling and prioritising access to ECEC and OSHC for families experiencing vulnerability and disadvantage, or families with additional needs, such as a parent or child with a disability.

Analysis of the Australian Early Developmental Census (AEDC) 2018 results for the City of Sydney indicates that overall the City performs well, with a lower proportion of developmentally vulnerable children than the average for NSW. However there are some suburbs where there are significantly higher proportions of developmentally vulnerable children, including Woolloomooloo and Rosebery. This reinforces the need for the City of Sydney to prioritise these children and families by facilitating access to affordable, good quality ECEC and OSHC, and other targeted services and programs.

The introduction of the Child Care Subsidy by the Federal Government in 2018 (replacing previous schemes) has changed the way many people can access financial assistance for formal ECEC and OSHC. It includes income and work activity testing. Although the net result is that more people can access more financial assistance, it does mean families that cannot meet the work activity test can access only 24 hours of care each fortnight, which is a reduction from the 48 hours of care under the previous scheme. It will be important for the City of Sydney to ensure families experiencing vulnerability or disadvantage who are impacted by this change, can still access this important education before formal schooling.

As a direct service provider, and with properties leased through the Accommodation Grants Program, the City has a range of mechanisms to influence affordability and operations of its child care services. This report recommends the City continues its existing efforts and explores opportunities to expand how it helps children and families experiencing vulnerability and disadvantage to access child care into the future.

Future child care models

The study identifies a range of holistic frameworks and models that consider the needs of children and families across the broader functions of Local Government.

With emerging models of care, such as intergenerational learning, and integrated child and family services models there is the potential for the City to consider new models for the delivery of child care.

It also highlights that future ways of working, including flexible arrangements, virtual interactions and increasing specialist or contractor roles are likely to change the frequency, regularity and hours of child care needed within the City, challenging existing operating models.

Overall, there is an opportunity for the City of Sydney to consider more strategic and integrated organisation-wide approaches to meeting the needs of children and families within the City. This will include not only how it manages and operates its portfolio of properties, but thinking about how all its services and programming is integrated to meet the needs of children and families.

Conclusion

The *Child Care Needs Analysis 2019* shows a complex range of factors that influence the supply and demand of child care. Many of these factors and variables will need to be monitored by the City over the coming period of significant residential and workforce growth to 2036.

Since 2013, the City of Sydney has undertaken a deliberate and successful strategy to increase child care places from the significant shortfall being experienced in 2013 and predicted to remain until 2031. The 2019 study indicates that overall, supply is now meeting demand, and this trend is set to continue to 2036.

It will be important for the City to monitor this at a Village level, and further investigate the demand for child care from workers, as this is a significant driver of demand for places in the City of Sydney. It has also highlighted the geographical challenges in ensuring child care is located in the right places. While across Villages there is slight variation in supply, it will be important to monitor overall trends and allocation of supply and demand.

The study shows there are a number of schools where OSHC services are full with a waiting list; this is placing a strain on some families who need after school care to support their work arrangements.

The City of Sydney plays a valuable role as an enabler and provider of ECEC and OSHC services. It will be important for the City to consider its strategic directions for its portfolio over coming years, based on all the factors identified within the study, and consider how it integrates the voices and needs of children across the organisation.

1. Introduction

The City of Sydney is updating its *Child Care Needs Analysis 2013* for long day care, preschool and occasional care considering past, current and future demand to 2036; and in a new study also wants to understand outside of school hours care (OSHC) focusing on existing supply, and methodologies for future demand.

The primary purpose of the study is to “provide an accurate analysis of current and projected future demand for early education and care across the City’s 10 Village precincts ... [identifying] the clear drivers and impacts for current and future, supply and demand, culminating in a ‘gap analysis’ by location”¹.

This builds on the 2013 report that provided current and future demand for children’s services for children aged from birth to five years, not at school; and identified the opportunities and barriers to children’s services provision as framed by regulatory and policy environments.

City of Sydney response to the *Child Care Needs Analysis 2013*

The *Child Care Needs Analysis 2013* indicated a significant undersupply of child care and provided a range of recommendations in relation to increasing supply and improving access to early childhood education and care (ECEC) for residents. Over the past six years the City of Sydney has undertaken a range of actions to respond to recommendations from the report.

The City of Sydney committed capital funding to develop and constructed four new long day care centres (LDC) located in:

- Annandale: The Crescent Early Learning Centre
- Alexandria: Goodstart Huntley Street Early Learning Centre
- Zetland: Waranara Early Education Centre
- Darlinghurst: Goodstart East Sydney Early Learning Centre

These new centres have added 294 child care places to the market.

As part of the Accommodation Grants Program (AGP), and as a response to the *2013 Study*, each of these new services have specific performance criteria including priority of places and reduced fees to encourage and prioritise places for children and families experiencing vulnerability or disadvantage. Following a review of other ECEC services in the City’s network, this performance criterion was applied in all ECEC services under the AGP, ensuring that families experiencing vulnerability and disadvantage can access child care places at services owned and/or operated by the City of Sydney and its providers.

1 City of Sydney (2018), *Request for quotation Number 118,004 Child Care Needs Analysis 2018*, p. 3.

In addition, the City's has worked with developers to secure new child care centres for new developments in the City of Sydney through:

- conditional sale of land
- new developments
- review of its development controls.

These actions, along with an increase in the number of services operating, mean that the supply of child care has increased significantly since 2013, providing families more choice of ECEC services and significantly reducing the deficit in supply of places.

Project aims

The City wants to:

- understand local government's role in ECEC
- understand key demographic trends relating to children and families in the local area in each of the Village precincts
- review the City's existing child care supply and demand methodologies in order to provide a forecast for supply and demand to 2036
- consult widely with stakeholders including ECEC and OSHC providers and families using ECEC and/or OSHC services
- review government policies that may impact on supply and demand of ECEC and OSHC services
- review the City's planning frameworks particularly considering the State Environmental Planning Policy (SEPP) and its interaction with the City's Development Control Plan (DCP)
- understand the drivers of not-for-profit and private child care provision in the local area
- consider alternate models of child care provision and delivery.

Families At Work (FAW) was retained by the City of Sydney to investigate these areas and this report provides findings of this investigation.

Methodology

This report utilises a number of different methodologies including:

- desktop research
- online and phone surveys to all children's services providers in the local area
- an online survey targeted to residents and non-resident workers who have children or are planning children in the future
- interviews with key ECEC and OSHC stakeholders.

Review of existing early childhood education and care services market place

To determine the current supply of ECEC services in the City of Sydney, a complete listing of all ECEC and OSHC services was obtained from the Education and Care Services National Registers published by Australian Children's Education & Care Quality Authority (ACECQA). Each service was contacted by phone and an online survey.

Current and future child care needs

Demand for child care was determined by understanding a range of factors including:

- the current and future population of children residing in the City of Sydney area
- the proportion of these children likely to access formal care
- the proportion of children accessing LDC or OSHC
- proportion of unmet demand for child care
- how many days children access care
- the current and future population of children from non-resident workers in the City

Data sources

The following key data sources were used for this study.

Australian Bureau of Statistics (ABS)

- Census 2016
- *Childhood Education and Care, Australia June 2017 (Cat 4402.0)*

City of Sydney

- Floorspace Employment Survey 2017
- Profile ID (Resident Forecast)
- Development monitoring
- Employment forecasts

Consultant studies

- User Survey: *Understanding your child care needs survey 2019*
- Market research with providers
- ACECQA

Education and care services included in this report

This report considers those services that are defined as education and care services under the *Education and Care Services National Law 2010* (Commonwealth) and its subordinate *Education and Care Services National Regulation 2011* (Commonwealth). The Regulation defines education and care services as meaning

any service providing or intended to provide education and care on a regular basis to children under 13 years of age².

² *Education and Care Services National Law 2010*, Cl. 5, (1).

What services are included

The following ECEC and OSHC services are included in this report. These service types are considered 'formal child care' that is regulated care away from the child's home.

“Long day care – these are centre based child care services providing all day or part time care for children. Long day care primarily provides services for children aged 0-5 years.

Occasional child care – comprises services usually provided at a centre on an hourly or sessional basis for short periods or at irregular intervals for parents who need time to attend appointments, take care of personal matters, undertake casual and part time employment, study or have temporary respite from full time parenting. These services are aimed primarily at children aged 0-5 years.

Outside school hours care – these services provide care for school aged children to 12 years old before school, after school, during school holidays and/or on pupil free days. OSHC may use stand alone facilities, share school buildings and grounds and/or share facilities such as community halls. [These services are generally referred to as before school care, after school care and vacation care.]

Preschool – includes services that deliver early childhood education programs provided by a qualified teacher that are aimed at children in the year before they commence full time schooling, although there are different child starting ages across jurisdictions.”³

What services are not included

It excludes mobile children's services; short term on-site care at gyms, hospitals or conferences attended by the parents; early intervention and some disability services; and personal arrangements such as nannies or babysitters.

3 Productivity Commission (2014), *Childcare and Early Childhood Learning*, Inquiry Report No. 73, Canberra, p. 76.

2. Review of local government's role in ECEC and OSHC

This section of the report provides an overview of the City of Sydney's role in ECEC and OSHC services. It also considers a variety of roles that local government can take as a direct provider, landlord, enabler, capital funder and advocate for children'.

The City of Sydney children's services

The City has had a long history in the provision of a range of children's services.

The City currently manages ten children's services including LDC, preschool, occasional care, after school care, and vacation care. All service staff are employed by the City and managed by a team under the Manager, Child and Family Services. These services are:

- Alexandria Child Care Centre – LDC
- Broughton Street Kindergarten, Glebe – preschool
- Hilda Booler Kindergarten, Glebe – preschool
- Redfern Occasional Child Care
- KGV Children's Program, The Rocks – after school care and vacation care
- Pyrmont Children's Program – after school care and vacation care
- Redfern Children's Program – after school care and vacation care
- Surry Hills Children's Program – after school care
- Ultimo Children's Program – after school care and vacation care
- Woolloomooloo Children's Program – after school care and vacation care

The City has a strong commitment to supporting those families who may be experiencing vulnerability or disadvantage providing free or low-cost access to services at Redfern Occasional Child Care, Redfern Children's Program, Surry Hills Children's Program and Woolloomooloo Children's Program. These areas have increased numbers of families living in social housing or Aboriginal and Torres Strait Islander families. The City applies priority of access guidelines for these services which are shown below.

Priority of access guidelines

Families must earn a weekly gross income that is at or below the determined threshold as specified in the *Income Test for Low Income Health Care Cards* – retaining income threshold table.

Positions at these services are allocated to children currently enrolled at the service and then to children currently on the waiting list in the following priority order;

First Priority: children at risk of serious abuse or neglect

Second Priority: siblings of children currently enrolled

Third Priority: family meets one or more of the following – Lives in City of Sydney LGA – Works in City of Sydney LGA – Attends school or services in City of Sydney LGA⁴

The City provides a work-based child care centre for its employees at Chippendale Child Care Centre, where City employees receive priority of access to places. City employees are able to receive fringe benefits tax exemption salary packaging of their child care fees at this centre and any other children's service directly managed by the City.

In addition to the services the City directly manages, it owns 18 centres which are leased at reduced or no rental costs to not-for-profit providers under the AGP. The AGP requires each of the not-for-profit providers to meet specific performance criteria that support the City in meeting its objectives to ensure affordable, quality care is available and programs can support children from families experiencing vulnerability and disadvantage. The AGP is an important program providing benefits to both the City and not-for-profit tenants with formal leases that are reviewed every five years "based on achieving identified community outcomes"⁵.

The City has two long day care commercial leases with two for-profit providers.

Overall, the City of Sydney's children's services portfolio provides 1,496 approved places for ECEC and OSHC. This represents 15.2 per cent of the total places in the City of Sydney local area.

A complete list of all children's services owned and/or leased by the City is attached in Appendix A.

The City is also involved with children through provision of:

- creative arts programs in school holidays at the Pine Street Creative Arts Centre
- targeted programs to children at different City libraries such as a dedicated children's area at the Green Square Library
- planning assessments for long day care centres
- ongoing monitoring of child care supply and analysis against the projected demand
- the Community Services Grants Program where children's services may be recipients of these grants
- strategic oversight of child and family services with a recent focus on child protection and child safe organisations
- management with tenants of child care centres owned by the City.

4 City of Sydney, Child and Family Services, *Priority of Access Procedure*, August 2018.

5 City of Sydney (2014), *Productivity Commission Public Enquiry – Childcare and Early Childhood Learning*, p. 6.

The role of local governments

Local governments are well placed to understand and meet the diverse needs of their local community through oversight and funding of infrastructure and facilities; this includes resident families with children and those coming into the community who may have child care responsibilities.

A 2013 report by the University of Technology Sydney (UTS) identified the following key roles and functions for local government:

Whole of community strategic planner	Strategic planning considers the current and future needs of the whole community taking into account the “social, economic and environmental planning dimensions of community development”
Service planning partner	Partnering with other government agencies and external stakeholders to plan for children’s services
Enabler	Actively supporting the development of child care provision as needed by the local area; for example, provision of demographic and market data, discussions with planners prior to lodgement of DAs, financial assistance to enable access to children’s services for target children and families
Provider	A direct provider of ECEC and OSHC services
Strategic land use planner	Use of planning tools to encourage children’s services development that considers the health and safety of children, minimises impact on residents including traffic to and from the service, ease of access to public transport, and proximity to related facilities and services

Source: University of Technology, Centre for Local Government (2013), Best Practice Guideline for the Planning and Development of Child Care Facilities, p. 12-14.

This supports feedback from stakeholder interviews that identified local government as proactive facilitators and enablers of children’s services provision within the community. This feedback also noted the importance of local government processes not unnecessarily hindering the provision of children’s services, for example, land use and planning tools.

The City of Sydney's sphere of influence

It is important that children's services are considered within a wider framework that informs the work that the City of Sydney engages in with regard to community, social and economic infrastructure in its entirety.

The City of Sydney developed *A City for All, Social Sustainability Policy and Action Plan*, that considers issues related to cohesion and connectedness through enhancing social justice and community resilience. This policy and action plan sets out an ambitious agenda to meeting the following United Nations' Sustainable Development Goals (SDG), including:

- Good Health and Wellbeing (SDG 3)
- Decent Work and Economic Growth (SDG 8)
- Reduced Inequalities (SDG 10)
- Sustainable Cities and Communities (SDG 11)
- Peace, Justice and Strong Institutions (SDG 16)
- Partnerships for the Goals (SDG 17).

"Putting people's wellbeing at the heart of our city is the essence of social sustainability. Sustaining a socially just and resilient society is vital to Sydney's progress." Applying a social justice lens enables the City to consider how social inequity impacts in the local area, and develop strategies and actions that can be put in place to ensure that a diverse community continues to thrive into the future.

A key consideration for the *Social Sustainability Policy and Action Plan* is where the City places its efforts to get best outcomes for children and families. An analysis of the City's roles against the UTS framework indicates that:

- As a provider under this Plan this report recommends the City will continue providing social programs and services including "child care services"⁶ targeted to those families that the market does not cater for. This has been a key emphasis for the City, providing services that are specifically targeted to those families who may be experiencing vulnerability or disadvantage with service eligibility based on holding a government health care card. These services provide an education and care program that supports the social and emotional wellbeing of children and families, creating safe places of sanctuary through place-based and play-based approaches. One service coordinator commented that children and families love coming to the service as it is a safe place and they don't want to go anywhere else.

Some stakeholders commented that the market is delivering universal children's services and where local government can make the greatest impact is by supporting those children and families who may find it more difficult to access ECEC or OSHC services. This could include, for example, those families experiencing vulnerability or disadvantage who may find child care fees unaffordable. This reflects the City's view of its involvement in direct children's services provision to date.
- As an enabler and strategic land use planner the City has used recent child care capital works programs to influence broad child care supply as well as child care for targeted families. Four new long day care centres have been built in Alexandria, Green Square, Bourke Street and Annandale.
- As a service planning partner with the not-for-profit external providers that manage these new services, the City influences priority of access to places and affordability of daily child care fees through the AGP in return for providing places to children aged from birth to two years and accommodating children experiencing vulnerability and disadvantage.

6 City of Sydney (2018), *A City for All – Towards a Socially Just and Resilient Sydney*, p. 20.

Opportunities for child care and beyond

Best-practice exemplar

Many stakeholders commented that local government children's services are often viewed as exemplars of best-practice provision. This was because of local governments' long history of involvement in direct service provision within a strong strategic and transparent framework, and with shared internal infrastructure and resources that support this provision. There are opportunities for the City to build on its existing practices and articulate where it provides exemplars of best practice.

Of particular note is the strong work that the City does in supporting children and families who may be experiencing vulnerability and disadvantage to more easily access children's services.

Recommendation

It is recommended that the City consider partnering with internal or external action researchers to document the successes of these programs.

This action research could be shared with external stakeholders who may be interested in understanding how local government can support children and families where the market does not meet always meet demand from particular target groups.

Advocacy

The City also has a role to play in advocacy in children's services as a direct service provider, considering some of the following issues which are discussed later in the report.

- Equitable access to good quality ECEC and OSHC services for those children and families who may find it more difficult to access these services due to vulnerability and disadvantage.
- National planning principles that could impact on areas of over and under supply of children's services.
- National workforce strategy that would encourage and support a pipeline of appropriately qualified ECEC and OSHC staff.
- Maintaining and strengthening an appropriately resourced National Quality Framework (NQF).

The City of Sydney would need to consider its position in relation to these and other matters as it relates to its own direct service provision, and supports outcomes in *A City for All* for children and families living in the local area.

Many local governments are seen as market leaders in their community, and anecdotally, the City of Sydney is seen in this way. There may be opportunities for the City to use this leadership role to influence not only the child care market, but also the public policy area that ECEC and OSHC services operate in.

Recommendation

It is recommended that the City continue its participation in children's services organisations that advocate for quality and access for ECEC and OSHC services, such as Early Childhood Australia (ECA), Australian Community Children's Services (ACCS), and the Local Government Children's Services Managers Network.

Other frameworks that influence the role of local government

Some local governments have adopted frameworks that focus attention on specific groups such as Child Friendly Cities or place-based approaches such as Municipal Early Years Plans. This section of the report provides information on some of the ways that local government is involved in the provision of ECEC and OSHC services through wider child well-being frameworks.

Child Friendly Cities

Child Friendly Cities, commencing in 1996, is a United Nations initiative that aims to put children at the centre of a local government agenda. The initiative considers how article 12 of the United Nations Convention on the Rights of the Child can provide practical agency to children's voices in areas that affect them.

Article 12: 1. States Parties shall assure to the child who is capable of forming his or her own views the right to express those views freely in all matters affecting the child, the views of the child being given due weight in accordance with the age and maturity of the child.⁷

Through this lens, local government is encouraged to consider its governance, services and environment in collaboration with children where children may be affected by local decisions.

A UNICEF report outlines a framework for collaboration with children and other relevant stakeholders through nine key areas. The following chart shows this framework.

Children's views are actively sought, listened to and taken into account in decision making processes	Legislative frameworks promote and protect the rights of all children	A local government wide children's strategy or agenda
Internal resources and/or structures to coordinate the children's strategy	Systematic assessment and evaluation of the children's strategy	A budget to allow implementation of the strategy
A regular State of the Cities Children report	Raising awareness about children's rights internally and externally	Advocacy to children

Source: UNICEF (2004), *Building Child Friendly Cities, A Framework for Action*, UNICEF Innocenti Research Centre, Italy, p. 4

⁷ [ohchr.org/Documents/ProfessionalInterest/crc.pdf](https://www.ohchr.org/Documents/ProfessionalInterest/crc.pdf), accessed 15 April 2019.

Case study – Wollongong City Council

Wollongong's Child Friendly City Initiative is an important part of creating a family friendly city. Council does this because it:

- “Provides children with an opportunity to express ideas and opinions about decisions that affect them
- Increases children’s sense of connection and belonging to their community
- Teaches children new skills
- Helps create programs and services that better reflect children’s needs
- Keeps children at the centre of a City’s vision for development”⁸

Wollongong City Council began involving children in its decision making in 2006 in one area of Council business – playground development – as a way to understand, implement and measure successes of adopting Child Friendly Cities.

In 2012 Wollongong City Council consulted with 100 children and young people of varying ages from three to 25 years to inform the development of Council’s Community Strategic Plan. Children were asked “what they most liked about living in Wollongong, what things worry them the most about living in Wollongong, what they could change to make Wollongong a better place to live, and if Wollongong was the very best place to live, what would it look and feel like”⁹. Part of this consultative process included children in years four and five from different primary schools presenting to a resident community summit with 200 attendees about their issues, concerns and opportunities for their community. This resulted in the release of a child friendly Community Strategic Plan – *Wollongong 2022 ... Report to the Children & Young People of Wollongong* (2012) where each of the six community goals describe what children told Council, what needs to happen to achieve the outcomes, and how children and young people can help achieve these goals.

Wollongong City Council continues to use this approach today.

Municipal Early Years Plans – Victoria

Local governments in Victoria are encouraged to develop Municipal Early Years Plans (MEYP) that are place-based, whole of local community and systems approaches to “prevention, equity, health and long-term social and educational outcomes for children”¹⁰, particularly those experiencing vulnerability or disadvantage. MEYPs focus on children aged from birth to eight years; however this does not preclude a Council taking a wider view considering outcomes the children and families through community capacity building and partnership approaches across an LGA.

MEYPs identify the many ways councils could be involved in ECEC and early year’s programs and is not limited to just those services directly delivered by a council. MEYPs encourage councils to consider their roles in relation to facilities and service provision, advocacy, planning and coordination and community capacity building, it could include universal and targeted children’s services, early intervention and prevention, health programs such as the Eat Smart Play Smart program developed by the National Part Foundation of Australia and targeted to OSHC services, fitness and well-being, playgroups, transition to school, and early childhood health centres.

8 wollongong.nsw.gov.au/services/community/Pages/childrenfamily.aspx, accessed 6 May 2019

9 Wollongong City Council (2012), *Wollongong 2022, Report to the Children & Young People of Wollongong*, p. 2.

10 Municipal Association of Victoria (2018), *MAV Resource Guide to Municipal Early Years Planning*, p. 6.

Case study – The City of Greater Geelong

The City of Greater Geelong has four key themes for its 2018 to 2022 MEYP. These are:

- Supporting families to help children achieve their full potential
- Promoting high-quality, innovative services
- Providing early and sustained support for those who need it most
- Providing accessible and inclusive services¹¹

These themes were identified to work towards improving the health and well-being of children aged from birth to eight years in the local area; and reflected a wider Victorian Government interest in child well-being, and early intervention and prevention.

Through consultation the City of Greater Geelong identified the spheres of influence and action areas that would have the greatest impact over the four-year period. The following extract shows the strategies identified in theme two and the actions the City is working towards.



THEME TWO: PROMOTE HIGH-QUALITY, INNOVATIVE SERVICES

We want to support early years professionals to deliver high-quality, integrated services across the municipality. This will only be possible if we work collaboratively with the broad range of different organisations offering early years services in our region.

WHAT YOU TOLD US

You value access to quality services, health services and a strong sense of community.

STRATEGY	ACTION
Work together with other service providers to achieve better outcomes for children and families.	<ul style="list-style-type: none">• Embedding a culture of collaboration across early years services including; Family Support agencies, Child Protection services, The Orange Door, Community Health services and Inclusion Support services.• Build infrastructure that supports collaborative (integrated) service delivery, including maintenance and refurbishment of facilities to meet growing needs of communities.
Embrace new ideas and better ways to work.	<ul style="list-style-type: none">• Identify business improvement activities that promote best practice service delivery models.• Build partnerships for agreed action, and continuous improvement.

Source: The City of Greater Geelong (2018), *Municipal Early Years Plan 2018-22*, p. 14

The MEYP sits within the wider context of *Greater Geelong: A Clever and Creative Future*, and National and Victorian government policies.

11 The City of Greater Geelong (2018), *Municipal Early Years Plan 2018-22*, p. 5.

Engaging with children in the City of Sydney

Children in Sydney are helping create their City, by being part of planning for local places in their community, as well as providing their input into *Sustainable Sydney 2050*, the new Community Strategic Plan for Sydney.

Since 2012 children and young people have been a key focus for the City's dedicated Community Engagement team to help design local spaces, such as parks and playgrounds. Children have inspired many landscape architects with their imaginative and practical ideas for parks and playgrounds including Reconciliation Park, the new City Centre playground, Fitzroy Gardens' playground and new skate spaces.

As part of the community engagement for Sustainable Sydney 2050, students from 19 primary and high schools across the City have provided their input into the priorities for their City in 2050 through workshops, summits and presentations to the Lord Mayor. By involving children and young people in engagement and decision-making processes, the City aims to create places and spaces that meet children's needs and celebrate their creativity, as well as increase their understanding of local government, so they can continue to be engaged members of the community.

Summary

The City of Sydney has a range of programs, beyond those listed in this report, focussed on meeting the needs of children and young people. However, as best-practice, the City could explore holistic models to meet the needs of children and families, beyond its role in ECEC and OSHC.

Recommendation

The City explore strategic and holistic models for meeting the needs of children, ranging from ongoing community and civic engagement, to strategies which integrate the voice, needs and safety of children across the different functions of the organisation.

3. Review of NSW and Australian Governments' policies impacting on demand and supply

This section of the report provides an overview of NSW and Australian government policies that may impact on demand and supply of ECEC and OSHC services.

What has impacted

Child Care Subsidy

The Child Care Subsidy (CCS) commenced in July 2018 replacing the Child Care Benefit (CCB) and Child Care Rebate (CCR). CCS is a payment from the Australian Government to help eligible families afford ECEC and OSHC services.

The amount of CCS a family is eligible for depends on total annual family income, amount of work or related activity per fortnight, and type of children's service used. The CCS is capped to an hourly rate by service type. These caps are for:

- long day care – \$11.55/hour
- family day care – \$10.70/hour
- before, after and vacation care at \$10.10/hour.

The family income thresholds for CCS eligibility are more generous than the previous CCB. The threshold for CCB eligibility was an annual family income of \$156,914; the CCS threshold is \$352,453.

Under CCS more families are eligible to receive some type of subsidy payment. Families earning from \$188,163 to \$352,453 per annum are better off under CCS receiving a maximum payment of \$10,373 per year compared with the previous CCR which was capped at \$7,600 per child per year. There has been a small increase in child care centre occupancy since the introduction of CCS which has been attributed to those families previously not eligible due to higher incomes now accessing child care¹².

¹² educationtrust.folkestone.com.au/childcare-market-in-australia-government-funding/, accessed 18 April 2019.

At the lower end, the income threshold for families that meet the work activity test and are eligible to receive the maximum subsidy increased from \$45,114 to \$68,163 per annum. Currently around 30 per cent of families receiving CCS have incomes below this minimum threshold¹³.

CCS eligibility is based on a three step work activity test which provides for up to 100 hours of CCS per fortnight. The activity test is broader than previously and includes a wide definition of paid and unpaid work. A single parent or the person working the least hours per fortnight in a couple family must be engaged in at least eight hours per fortnight of approved activities to receive CCS.

Under CCS low income families earning less than \$65,710 who do not meet the work activity test are now only eligible for 24 hours per fortnight of subsidised care in contrast to the previous 48 hours/fortnight of subsidised care.

There have been, and continues to be, sector wide concerns that those families who are low income earners and do not meet the work activity test will find it increasingly difficult to access ECEC or OSHC services due to affordability; and it is these families that would benefit most from access to quality early learning and leisure environments. A 2016 report by Fox and Geddes draws together significant international and Australian research showing that 15 hours per week of attendance at a high quality early learning program benefits most children, and higher hours of attendance, up to 30 hours per week, produce significantly better outcomes for those children experiencing vulnerability or disadvantage. These outcomes are measured in better reading, writing and mathematics scores; and these outcomes continue well into secondary school¹⁴.

The Australian Government provides top up payments additional to the CCS to families who may find it challenging to afford ECEC or OSHC services – this payment is called Additional Child Care Subsidy (ACCS). ACCS is targeted to child well-being, grandparent carers, and families experiencing temporary financial hardship, and transition to work through receipt of Government payments and a work participation plan¹⁵. Low income families who may be experiencing vulnerability or disadvantage are often those who are eligible for ACCS.

The following table shows the number of children and families who accessed the old Special CCB up to 30 June 2018 and those that received the new ACCS. Since the implementation of CCS the number of children and families who are receiving ACCS to support child safety and well-being has declined significantly. In the September quarter 2017 17,030 children received Special CCB related to child well-being and in the September quarter 2018 this number has reduced to 9,140 children, almost halving.

13 Cth, Education and Employment Legislation Committee, Estimates, Senate, 21 February 2019, p. 61. parlinfo.aph.gov.au/parlInfo/search/display/display.w3p;query=Id%3A%22committees%2Festimate%2F5b4ca39d-d1ec-436a-8935-f55c9916433e%2F0000%22, accessed to May 2019.

14 Fox, S and Geddes, M. (2016), *Preschool – Two Years are Better Than One: Developing a Preschool Program for Australian 3 Year Olds – Evidence, Policy and Implementation*, Mitchell Institute Policy Paper No. 03/2016. Mitchell Institute, Melbourne. Available from: mitchellinstitute.org.au, p. 26, accessed 1 May 2019.

15 education.gov.au/additional-child-care-subsidy-0, accessed 15 April 2019.

Table 1. Access to Special Child Care Benefit/Additional Child Care Subsidy

	Sept quarter 2018		June quarter 2018		Sept quarter 2017	
Eligibility criteria	Children	Families	Children	Families	Children	Families
Child Well being	9,140	6,440	15,680	10,820	17,030	11,490
Grandparent	4,890	3,330	6,800	4,040	8,080	4,490
Transition To Work	6,750	4,350	8,610	6,040	10,760	7,430
Total	20,780	14,120	31,090	20,900	35,870	23,410

Source: Department of Education and Training: Early Childhood and Child Care in Summary September Quarter 2017, p. 14 and Early Childhood and Child Care and Summary June Quarter 2018, p. 17; Child Care in Australia Report for September quarter 2018, Table 7.1: Number of Families and Children accessing Additional Child Care Subsidy

Recommendation

The City continues to facilitate the Accommodation Grants Program with Specific Performance Criteria which target families experiencing vulnerability or disadvantage, as a key strategy to provide access to ECEC for these families.

The City continues to monitor the attendance of families experiencing vulnerability through the annual reporting by the service providers in the Accommodation Grants Program to identify emerging trends.

The City continues to ensure strategies are in place to encourage uptake of places for children in target groups, and/or remove barriers to accessing ECEC.

The City monitors any changes to the numbers of children attending its children's services located in Redfern, Surry Hills, and Woolloomooloo (with eligibility predicated on the income test for Health Care Card holders).

The City may need to consider how its service delivery may need to change in specific areas if child care participation trends for children and families experiencing declines.

NSW preschool funding

Since 2016 the NSW Government has invested significantly in its Start Strong program targeted to meeting the Universal Access targets of 600 hours of preschool participation for a child in the year before they start school. In 2016 the initial funding was for \$15 million targeted to preschools to make services more affordable for families. In 2018 an additional \$215 million was committed to 2021 to ensure ongoing access to preschool participation. Providers of preschool programs were required to pass on 75 per cent of the additional funds to families through fee reductions.

In 2019 three year old children whose parents have a health care card are also eligible to receive fee discounts provided under Start Strong. Additionally, in 2019 all three year olds will be eligible to receive this funding on a sliding scale of subsidies based on the current year before school base rate. This sliding scale is 25 per cent in 2019, 30 per cent in 2020, 40 per cent in 2021 and 50 per cent in 2022 and thereafter.

Overall, this program has made preschool more affordable for many families.

Both of the City's preschools – Broughton Street and Hilda Booter – cater to children aged three and four years. The current fee for children aged four years is \$45 per day and for children aged three years is \$47.50 per day.

Both preschools have extensive waiting lists with immediate demand. Broughton Street currently has 50 children on its waiting list and Hilda Booter has over 300 children on its waiting list, with 110 of these children wanting immediate access. There are only nine preschools in the City, compared with 105 long day care centres. There are limited choices for those families that prefer preschool.

Consideration

Given the limited choices around preschools, the City should consider any future funding opportunities to expand or support additional places in preschools.

Potential future impacts

NSW before and after school care fund

The NSW Government has committed \$120 million over the next four years to increase supply of before and after school care. This strategy will target public schools in Sydney, Newcastle, Illawarra, Central Coast and major regional areas. Public schools in these areas are required to “open their playgrounds, halls or classrooms for before and after school care and school holiday care from 7am to 6pm”¹⁶. There will be a specific funding support those schools where on-site options may not be viable, such as providing transport to and from off-site OSHC providers.

The \$120 million strategy includes:

- “\$50 million over four years to help schools buy new equipment and expand their facilities
- \$40 million over four years to provide rental subsidies to service providers located at public primary schools if they can demonstrate savings have been passed on to families
- \$20 million over four years for an implementation fund focused on schools where a standalone service may not be viable, including smaller schools and rural and remote communities
- \$8.5 million over four years for a team of specialists to help coordinate services and resources on an area or regional basis, to make it easier to setup and maintain a service and to take the hassle out of managing contracts with providers for principals
- \$2 million for a new website and mobile app to allow parents and carers to search for and book student places online”¹⁷.

Part of the strategy will also include reducing the cost of before and after school care to families by providing a capped rental subsidy of up to \$15,000 for providers located on public school grounds.

¹⁶ nsw.liberal.org.au/candidates/gladys-berejiklian/news/articles/BEFORE-AND-AFTER-SCHOOL-CARE, accessed 22 May 2019.

¹⁷ nsw.liberal.org.au/candidates/gladys-berejiklian/news/articles/BEFORE-AND-AFTER-SCHOOL-CARE, accessed 22 May 2019.

A team is currently working on the strategy within the NSW Department of Education. This strategy commence from July 2019; with parents being able to register their interest in accessing OSHC services from that time.

NSW Department of Education School Infrastructure Program

The NSW Government has a program underway to upgrade and expand public schools in NSW. Schools Infrastructure NSW¹⁸ lists the following program of works in the City of Sydney's local area:

- works in progress for the new Inner Sydney High School
- works in progress for the Alexandria Park Community School Redevelopment
- planning for new Ultimo Public School
- planning for Fort Street Public School upgrade
- planning for a new primary school in Green Square.

OSHC is being considered as part of the public school works.

Consideration

The City should monitor the progress and outcomes, including changes to supply, of the NSW Government before and after school care funding on the local area to determine any impacts for its own services.

The City should monitor changes to OSHC supply on school grounds and how this impacts the need for off-site services, such as those provided by the City of Sydney.

Recruitment and retention of degree qualified early childhood teachers and educators

The *Education and Care Services National Regulation* require that degree qualified early childhood teachers (ECT) must be employed for all or some of the time that a long day care centre or preschool operates. Currently in NSW a second teacher is required in those services with 40 or more children; from 2020 all other states and territories will be required to have a second teacher with approved qualifications in services with 60 or more children in attendance.

The Australian Department of Jobs and Small Business predicts that the education and training sector will be one of the four largest areas of employment growth over the next five years¹⁹. The following table shows national employment projections over the next five years for those working in the child care sector.

¹⁸ schoolinfrastructure.nsw.gov.au/, accessed 19 November 2019.

¹⁹ lmip.gov.au/default.aspx?LMIP/GainInsights/EmploymentProjections, accessed 1 May 2019.

Table 2. Five year national employment projections for the child care sector

	Qualification	May 18	May-23	Growth
Child Care Centre Managers	Bachelor	13,300	16,000	20.9%
Early Childhood Teachers	Bachelor	40,800	49,800	22%
Child Carers	Certificate III	156,300	183,900	17.6%

Source: Labour Market Information Portal, 2018 Industry Employment Projections – five years to May 2023

Around 20 per cent growth is projected at all child care levels. There is increasing concern in the sector about where this pipeline will come from. One option is to up-skill existing employees to Bachelor level. However, a 2016 National Workforce Study²⁰ found that educators who were working towards an ECT degree were more likely to leave children's services once they had completed their qualification looking for employment opportunities that offered better pay and conditions outside of long day care.

2019 National Quality Framework review

The NQF commenced in 2012. Regular review processes were built into the NQF to ensure that it continued to meet the objectives in the National Law. In 2019 a second review commenced, building on the work identified in the 2014 review and implemented in 2018. The current review focuses on the assessment and quality rating process; as well as how the NQF can reflect recommendations from the Royal Commission into Institutional Responses to Child Sexual Abuse; the National Review of Teacher Registration; and the Review of the Australian Qualifications Framework. Any outcomes from this review will be presented to the Education Council in a Draft Regulatory Impact Statement in 2020. This review covers the following areas.

Approvals <ul style="list-style-type: none"> • Scope of services regulated under the NQF • Application efficiency and effectiveness • Maintaining current information about service delivery • Physical environment 	Operation <ul style="list-style-type: none"> • Sustainability of NQF • Regulatory approach • Qualifications requirements • Protecting children and staff in an emergency • Education and care in OSHC • Education and care in Family Day Care
Public awareness of service quality <ul style="list-style-type: none"> • Value of quality rating for families 	Compliance and enforcement <ul style="list-style-type: none"> • Appropriateness of sanctions • Protected disclosures • Prohibition notices

Source: Education Services Australia 2019, *National Quality Framework Review Issues Paper*, p. 12-33.

²⁰ Irvine, S, Thorpe, K, McDonald, P, Lunn, J, & Sumsion, J (2016, May), *Money, Love and Identity: Initial findings from the National ECEC Workforce Study. Summary report from the national ECEC Workforce Development Policy Workshop*, Brisbane, Queensland: QUT.

The inclusion of OSHC services under the NQF has made significant contributions to raising the quality of OSHC services, including a focus on child health and well-being, leisure activities, active engagement with children in planning their program of activities, and community outreach.

A 2017 report tracking the implementation of the NQF from its inception through regular sector surveys found that 2017 respondents had positively impacted on their services through:

- educators were more interested and engaged in programming and planning – 29% of respondents
- their services were working more closely with the wider community – 28% of respondents
- educators regularly engage in reflective practices – 28% of respondents
- children experiencing improved learning outcomes – 24% of respondents²¹.

The increased emphasis on services working more closely with the wider community is a significant shift from the 2014 survey when only 15 per cent of respondents noted this. This wider community engagement reflects how the City operates its OSHC services, particularly those that target children and families experiencing vulnerability and disadvantage. These services operate within a much wider child well-being program providing leisure activities and programs that focus on trauma informed principles, and actively partnering with other non-government agencies to provide extensive family support.

Child safe principles

The National Office for Child Safety was established in July 2018 in the Department of Prime Minister and Cabinet. This Office was established in response to the Royal Commission into Institutional Responses to Sexual Abuse and will continue the work completed by the Australian Human Rights Commission on the National Principles for Child Safe Organisations. The Office will also develop and implement the Commonwealth Child Safe Framework and the National Strategy to Prevent Child Sexual Abuse. The National Principles were endorsed by the Council of Australian Governments (COAG) in February 2019. The National Principles are listed below.

21 Australian Community Children's Services (2018), *Trends in Community Children's Services* 2017, p. 44.

1. Child safety and wellbeing is embedded in organisational leadership, governance and culture.
2. Children and young people are informed about their rights, participate in decisions affecting them and are taken seriously.
3. Families and communities are informed and involved in promoting child safety and wellbeing.
4. Equity is upheld and diverse needs respected in policy and practice.
5. People working with children and young people are suitable and supported to reflect child safety and wellbeing values in practice.
6. Processes to respond to complaints and concerns are child focused.
7. Staff and volunteers are equipped with the knowledge, skills and awareness to keep children and young people safe through ongoing education and training.
8. Physical and online environments promote safety and wellbeing while minimising the opportunity for children and young people to be harmed.
9. Implementation of the national child safe principles is regularly reviewed and improved.
10. Policies and procedures document how the organisation is safe for children and young people.

The Principles aim to provide a nationally consistent approach to organisational child safety practices and are applicable to any child related organisation including ECEC and OSHC services. Currently compliance with the Principles is not mandatory; however work is underway through a Child Safe Sectors Leadership Group which includes the Chief Executive Office of ACECQA, to consider how these Principles may be reflected in the National Quality Standard (NQS).

Some ECEC and OSHC services have already started applying these Principles in practice. A guidebook²² has been developed by the Australian Human Rights Commission referring the principal back to its authorising environment within the Convention on the Rights of the Child, identifying key areas where organisations can take action and indicators that show the principle is being met.

It is outside the scope of this report to assess the extent to which the City of Sydney is already meeting these standards. The City has a Child Protection Policy and Procedures and is implementing training in this area.

Recommendation

The City should monitor requirements for the implementation of the Child Safe Principles by Local Government and it should be proactive in implementing the principles in its own services.

Consideration

The City may want to develop a best-practice guideline to describe optimum built environments for child care centres, interactions between spaces, child age break ups and maximum numbers of children, and above ground floor facilities. This will provide an extra tool for the City to influence the provision for quality environments for children.

²² childsafe.humanrights.gov.au/sites/default/files/2019-02/National_Principles_for_Child_Safe_Organisations2019.pdf, accessed 24 April 2019.

4. Review of the regulatory and planning environments

This section of the report reviews past child care DAs and considers what role the City could take influencing child care supply through planning. It reviews the existing City DCP as it relates to child care and the SEPP, and identifies some barriers and enablers of child care provision related to planning.

Review of the Child Care DCP and SEPP

Key planning documents for the City are the *Sydney DCP 2012*, Section 4.4.4 Child care centres and the Child Care Planning Guideline established under the *State Environmental Planning Policy (Educational Establishments and Child Care Facilities) 2017* (SEPP).

In many areas the DCP and SEPP are complimentary, with the SEPP adding compliance pathways beyond what the City requires through the DCP.

The SEPP takes precedence over the child care DCP except in relation to “building height, side and rear setbacks and car parking rates”²³. The SEPP specifically precludes a DCP from making any specifications relating to:

... ages, age ratios, groupings, numbers or the like, of children ... (a) operational or management plans or arrangements (including hours of operation), (b) demonstrated need or demand for child care services, (c) proximity of facility to other early education and care facilities, (d) any matter relating to development for the purpose of a centre-based child care facility contained in ... design principles set out in [Parts 2, 3 and 4] of the Child Care Planning Guideline ... this clause applies regardless of when the development control plan was made (State Environmental Planning Policy (Educational Establishments and Child Care Facilities) 2017, Part 3, Clause 26)

In practice, this stops the City from using any existing or future controls relating to these matters.

During research with providers, one stakeholder commented that the SEPP was developed, in part, to override local planning laws that had not kept pace with community needs, expectations and the built environment, particularly in CBD areas where outdoor space and car parking is very limited and there is strong demand for child care. However, this has changed over the preceding years.

23 NSW Department of Planning and Environment (2017), *Child Care Planning Guideline*, p. 3.

Analysis of the DCP and SEPP, and confirmed by the City Planners, noted there are still some outstanding issues between the DCP and SEPP. These are:

- child care centres located above ground floor. Planners commented that Building Code of Australia (BCA) will be reviewing child care provision in 2022. The SEPP does not specifically require a safe haven or an emergency lift; it comments that “fire safety and evacuation may be a priority in a high-rise building”²⁴ and “child care facilities above ground level may consider providing additional measures to protect staff and children [including] independent emergency escape routes ... safe haven or separate emergency area where children and staff can muster during the initial stages of a fire alert or other emergency”²⁵. The DCP explicitly states the requirement for either a safe haven or an emergency lift
- the SEPP does not specify a maximum number of child care places and specifically precludes the City from making any determinations on these matters. The current DCP specifies no more than 90 child places and at least 33 per cent of these child places must be for children aged under two years
- the SEPP does not specify minimum amounts of solar access; it does specify that outdoor areas should have “year-round solar access to it least 30 per cent of the ground area, with no more than 60% of the outdoor space covered ... shade structures ... to it least 30% of the outdoor area”²⁶. The current DCP requires the outdoor areas must have “at least three hours of solar access to 50% of the required outdoor area between 9am and 3pm on 22 June”²⁷. The DCP does not make reference to shade
- noise impacts. City Planners commented that the city has traditionally taken a technocratic response often requiring acoustic building solutions rather than considering operational and good practice solutions such as how children actively engage in a well-designed and good quality educational program.

Since the introduction of the SEPP, the City cannot rely on the DCP to influence quality outcomes on the built environment or for the children attending the child care facilities.

The City may be better placed to consider best-practice guidelines that describe optimum built environments, interactions between spaces, child age break ups and maximum numbers of children, and above ground floor facilities. It may also enable the City to comment on optimum environments for OSHC (where both the DCP and SEPP are silent).

The City of Parramatta uses its DCP in this way. The DCP defers to the SEPP²⁸. It “encourages excellence and best practice in the design of centre-based child care services [to] encourage ... providers to achieve best practice in the physical design of centre-based child care services ... and limit the potential impacts of child care centres in the residents’ enjoyment of their neighbourhood”.

The Parramatta DCP also references child care close to workplaces, businesses and above ground floor²⁹. While these requirements are very similar to the City of Sydney, the specific noting of proximity to work places and business may be a useful reference for the City in medium and high density areas.

24 NSW Department of Planning and Environment (2017), *Child Care Planning Guideline*, p. 9.

25 NSW Department of Planning and Environment (2017), *Child Care Planning Guideline*, p. 31.

26 NSW Department of Planning and Environment (2017), *Child Care Planning Guideline*, p. 36.

27 City of Sydney DCP 2012, Section 4: Development types, 4.4.4 Child care centres, clause 4.4.4 (3) (c).

28 City of Parramatta DCP 2012 clause 5.2, p. 5-19.

29 City of Parramatta DCP 2012 clause 5.2.3.3 (0.3 and 0.4), p. 5-25-26.

The Parramatta DCP refers to the use of physical measures as well as management measures to manage sound. Management measures include limiting the number of children in an outdoor area at any one time and staging outdoor activities to reduce the number of children outside³⁰.

Recommendation

It is recommended the City update the sections of DCP where it is no longer relevant due to the SEPP.

Review of child care Development Applications

In the past four years the City has received 32 DAs for child care centres. Nine of these 32 are completed, potentially providing around 611 child places, and another eight are under construction with expected completion dates between June 2019 and July 2020 providing around another 750 child places.

The following table shows the status of each of these DAs with the number of services and child places they may provide.

Table 3. Current status of City of Sydney child care Development Applications

Status	Number of services	Number of places
Under construction	8	669
Approved but not yet constructed	11	491
Lodged by not approved	2	110
Total	21	1,350

Source: City of Sydney

Twenty-one DAs are either under construction, approved pending construction or lodged pending approval. The following table shows these DAs by number of child places that could be added in each Village.

30 City of Parramatta DCP 2012 clause 5.23.5, p. 5-29.

Table 4. Total DA child places in the pipeline

	Total child places
CBD and Harbour	11
Chinatown and CBD South	147
Crown and Baptist Streets	40
Glebe Point Road	244
Green Square and City South	254
Harris Street	90
King Street	144
Redfern Street	420
Total	1,350

To 2019 most of the child care growth will occur in:

- Redfern Street providing potentially 420 child places
- Green Square and City South providing potentially 254 child places
- Glebe Point Road providing potentially 244 child places.

There were no DAs in Macleay Street & Woolloomooloo, and Oxford Street.

The existing DAs will be adequate to cover the current ECEC demand based on the current and future projections. It is anticipated that additional DAs will be lodged in the period to 2036 and this will need to be monitored by the City of Sydney.

Recommendation

The City continues to monitor DAs for child care centres to understand future impacts on supply.

Barriers and enablers of child care provision

City planners were not aware of any specific development issues related to the current child care DCP or SEPP.

Enablers

There is greater alignment between the SEPP and the children's services regulatory framework through the *Education and Care Services National Law and Education and Care Services National Regulation*. The SEPP sets out a pathway to building compliance, with design guidance and solutions for each of the matters for consideration.

All child care DAs are referred to the City's Child and Family Services team for comment and feedback. This ensures that an ECEC lens is considered as part of the approval process. Any concerns are discussed with the applicant including feedback to influence areas where the SEPP is very general and the DCP more specific. This process often has a positive outcome on the planning process.

Child care providers need confidence that their child care facility will be financially viable. Having access to information about forecast demand can assist providers plan for services in areas of under supply.

Local governments can identify underutilised land that could be made available for child care provision.

Recommendation

The *Child Care Needs Analysis 2019* is a publically accessible document to provide important context for potential suppliers.

Barriers

While the SEPP can be an enabler of child care provision, its lack of specificity could act as a potential barrier particularly to those developers who may be new to the sector with little or no understanding of children's services operations to help translate high level considerations into practice. This may result in child care facility plans that may not provide good quality care for children.

Finding suitable child care locations in high density areas can be challenging. A recent application received by the city was for a child care facility located over multiple levels with only one outdoor area located on the rooftop. There was no direct access to the outdoor area for children located on the lower levels of the facility.

Conditions of consent can make it difficult for ECEC services to quickly adjust to changes in market demand related to hours of operation, number of children and age break up of children.

What role should the City take in influencing planning?

A key question for the City to consider is whether the interests of the primary client of a child care facility, that is the child, should be, or are considered in planning frameworks. Generally a planning framework looks at what impacts a specific building may have on surrounding areas. For a child care facility the question of the child's best interests is addressed through the NQF. While the City's current child care DCP includes requirements that can directly impact on quality including maximum number of child places and prescribed hours of solar access, these were based on older legislation which did not integrate child care quality and planning considerations. How much should the City try to influence access to good quality child care for children and how much should be delivered through external regulatory frameworks?

The DCP prescribes a minimum number of child places for children aged less than two years and a maximum number of children in any one facility. Some City stakeholders view the ability to influence the supply of social infrastructure such as child care as an important enabler of community cohesion and economic participation, while others question whether this is a role that City should take through a planning framework.

It should however be noted that the new SEPP now states that we cannot consider numbers of children and age requirements when assessing a DA, as a result the Council can no longer apply this requirement.

The City also uses Voluntary Planning Agreements (VPA) as a way to increase community infrastructure and facilities including child care. A recent VPA at 505-523 George Street, Sydney included a 130 place child care facility. The City has also had pre-VPA discussions with a developer the Green Square and City South Village. VPAs cannot be relied upon to deliver at the time and in the location needed as they required a developer to make an offer in relation to the development of a site and delivery is still dependent on the development proceeding.

Recommendation

The City may wish to consider how it can use planning processes to continue to influence new child care centres in areas where there is an undersupply.

5. Drivers for private and not for profit provision of child care

This section of the report considers social and economic drivers for child care provision including current and future issues, considerations and opportunities.

What are some of the social drivers for child care provision?

Population growth

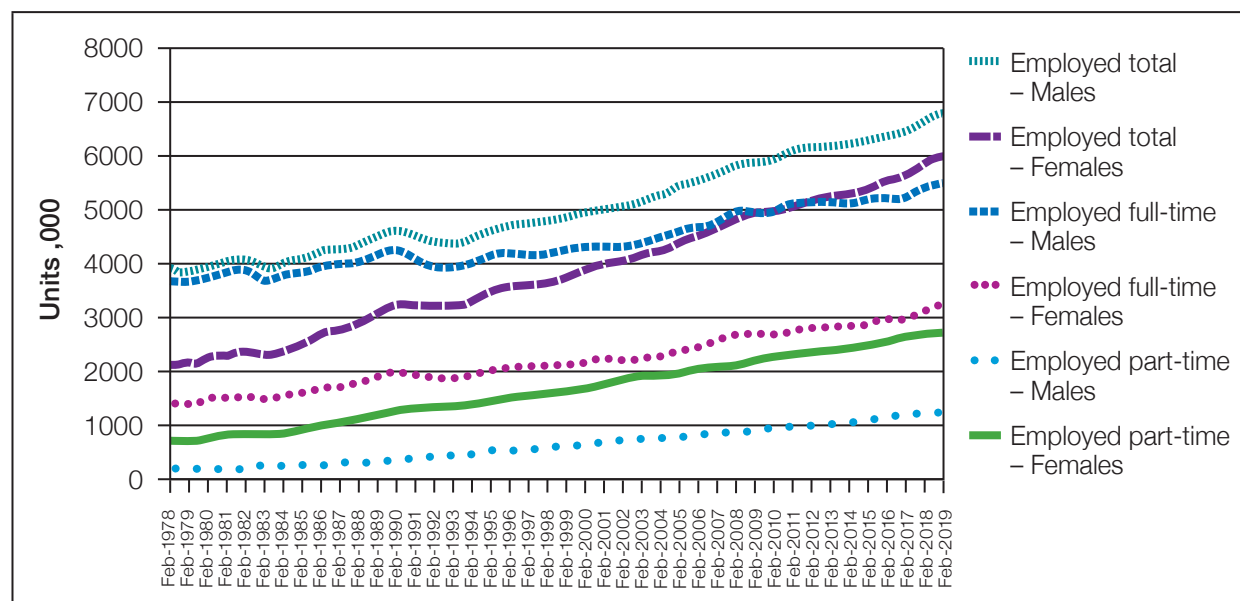
The current estimated resident population for the City of Sydney is 240,229 (2018). The resident population has been increasing each year; from 2006 the resident population has increased from 1.4 per cent to 4.8 per cent annually. By 2036 the population of the City of Sydney is estimated to be 339,490; a 40.9 per cent increase from 2018. There have been commensurate increases in the population of children aged from birth to four years and five to 11 years over this period. As the population grows, so does demand for access to infrastructure and social services, such as ECEC and OSHC services.

Workforce participation

In the period 1978 to 2019 women's workforce participation in Australia increased almost threefold from 2,116,500 to 6,000,600; over the same period men's workforce participation has increased by about 40 per cent from 3,881,102 to 6,790,900³¹. More men work full-time; over time this number is proportionally declining. Women's full and part-time workforce participation has steadily increased over time. The following chart shows workforce participation by gender from 1978 to 2019.

31 Australian Bureau of Statistics (2019), *Labour Force, Australia*, Table 1. Labour force status by Sex, Australia – Seasonally adjusted and Original.

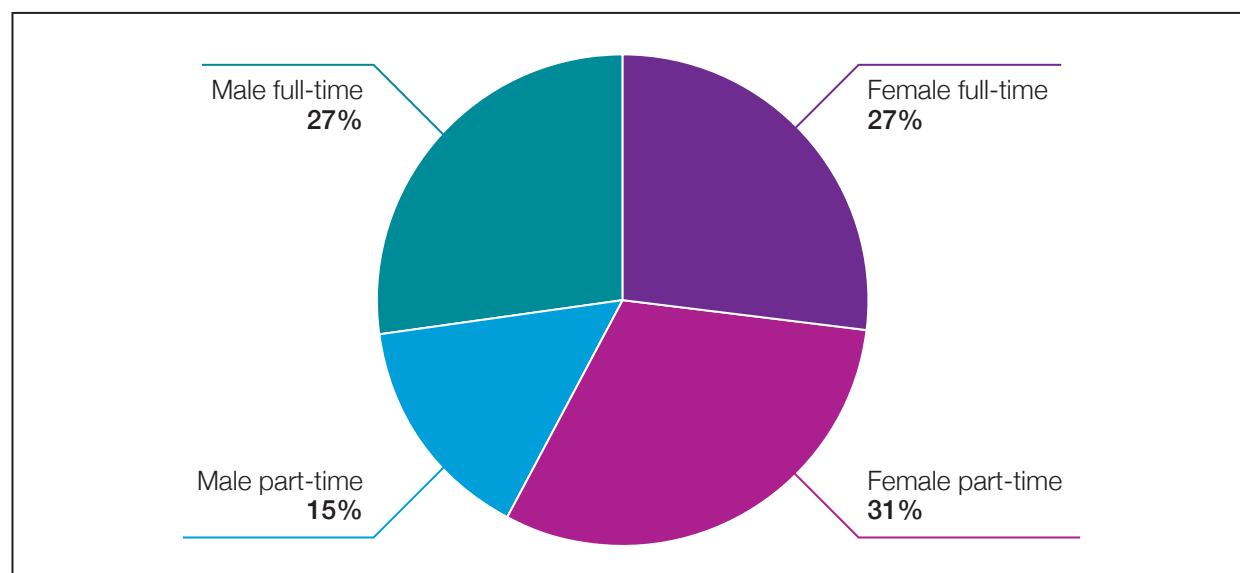
Table 5. Workforce participation 1978 to 2019 by gender and work mode



Source: Australian Bureau of Statistics (2019), *Labour Force, Australia*, Table 1. Labour force status by Sex, Australia – Seasonally adjusted and Original

The number of women participating in the paid workforce will continue to increase at a faster rate than the number of men. The Department of Jobs and Small Business predicts that in the five-year period to 2023 women's workforce participation will increase by 8.8 per cent; men's workforce participation over the same period will only grow by 5.6 per cent³². The following extracted chart shows the share of projected employment growth over the five-year period to May 2023 by work mode and gender.

Table 6. Share of projected employment growth – five-year period to May 2023

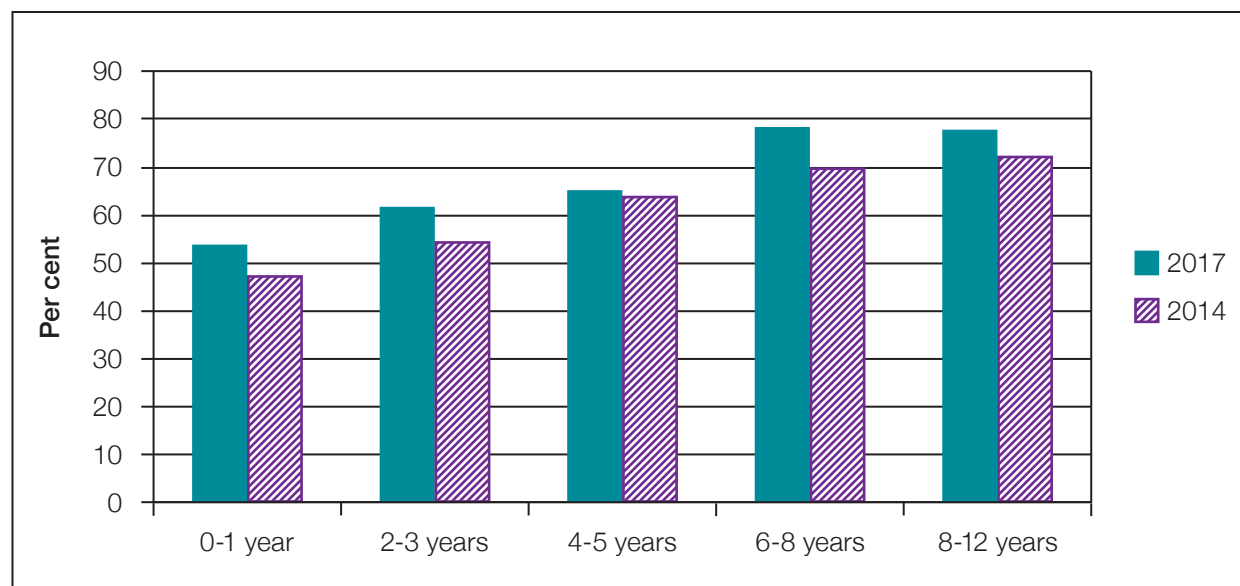


Source: Department of Jobs and Small Business, *Female Employment Projections 2018 Report*, p. 1

³² Department of Jobs and Small Business (2018), *Female Employment Projections 2018 Report*, p. 1.

ABS data shows that female workforce participation is predicated on the age of the youngest child in the family; the younger the child the less female workforce participation. The following chart shows that in 2017 around 50 per cent of women were in the paid workforce when their child was aged from birth to one year, this number increased to just over 60 per cent when the child was aged four to five years and over 70 per cent when the child was aged five to 12 years.

Table 7. Proportion of women employed by age of youngest child



Source: ABS, *Childhood Education and Care Australia*, Table 4 (2014) and Table 9 (2017)

The type of care used is also predicated on the age of the child; the younger the child the less formal and informal care used. Generally, the younger the child the less formal care that is used. The following table shows the proportion of formal or informal care used when the female parent is employed by age of the youngest child.

Table 8. Type of care used when the female parent is employed by age of youngest child

	Age of youngest child, female parent employed	
	Child aged 0 1 year	Child aged 9 12 years
Formal care	85%	93%
Informal care	76%	86%

Source: ABS (2017), *Childhood Education and Care Australia*, Table 9

As more women are participating in the paid workforce, if they have children aged 12 years or younger they are more likely to require access to ECEC or OSHC services.

There are increasing numbers of children participating in child care

The numbers of children participating in formal child care has been steadily increasing from year to year in Australia. The following table shows an increase of just over 66,000 children participating in child care from 1,250,270 children in June 2016 to 1,316,350 children in September 2018.

Table 9. Number of children using child care, June quarter 2016 to September quarter 2018

	Total Children	Per cent of Australian population
June 2016	1,250,270	30.9%
September 2016	1,288,480	31.9%
December 2016	1,280,770	31.4%
March 2017	1,281,260	31.4%
June 2017	1,268,140	31.5%
September 2017	1,312,650	32.2%
December 2017	1,302,940	31.9%
March 2018	1,287,900	31.5%
June 2018	1,269,260	30.7%
September 2018	1,316,350	

Source: Department of Education and Training, *Early Childhood and Child Care in Summary, Quarters June 2016 to June 2018; Child Care in Australia – Sept Quarter 2018*

Children participating in formal child care represent just over 30 per cent of the Australian population over the same period. There has only been one public quarterly report since the commencement of CCS and the Department is no longer reporting on proportion of Australian population. It will be important to monitor the number of children participating in child care under the new payment system and whether this increases as predicted by the Productivity Commission in its 2015 report³³.

Recommendation

The City will need to monitor workforce trends as well as proportions of children participating in formal child care on a regular basis over the coming years to ensure supply continues to meet demand; or that significant increases to demand are identified early on.

³³ pc.gov.au/inquiries/completed/childcare/report, accessed 24 April 2019.

What are some of the economic drivers for child care provision?

Occupancy

The largest operating expense for ECEC and OSHC services is related to wages and salaries. The number of staff required is based on services complying with child: staff ratios determined by relevant National Law and Regulation. In NSW the ratios are:

- for children aged from birth to less than two years: one educator for every four children
- for children aged two to less than three years: one educator for every five children
- for children aged three to five years: one educator for every 10 children
- for primary school-aged children attending OSHC: one educator for every 15 children.

Depending on the type of property payments made such as mortgages or rent; wages and salaries can represent from 60 per cent to 85 per cent of operating expenses. To meet these costs ECEC and OSHC services need to maintain a baseline of fee income through child occupancy. IbisWorld – an Australian market research company – estimates that 70 per cent occupancy is a breakeven threshold for long day care centres. Similar data is not available for OSHC services³⁴.

Tenure

Child care operators who lease properties need to ensure they had adequate length of tenure to receive a return on capital or operational investments they have made on their leased property. Several stakeholders commented that longer tender periods would facilitate OSHC providers investing in infrastructure to improve quality outcomes for children. One stakeholder commented they would not invest capital unless they have access to long-term leases with reasonable options.

Length of leases has also impacted on the child care market in the CBD. In the early 2010s the CBD office market was weak with many vacancies. A way to attract tenants was to include child care in the premises. This was a twofold strategy. First it was an attractive option for those employers who wanted to provide child care to their people as a tenant in the building. Secondly most child care centres have longer than usual leases, varying from 10 to 20 years, due to the need to amortise the capital investment required. Long leases increase the weighted average lease expiry (WALE) which measures the average time period in which all leases in a property will expire. A long WALE indicates a steady future income stream and increases the value of the property³⁵.

However, rent reviews are built into long child care leases, and as office vacancies decreased from around 8% in 2019 to 4% in 2019 child care rents have increased³⁶, increasing the cost of child care to parents; and in turn, in some instances impacting occupancy as these CBD fees are often more expensive than child care services located outside of the CBD area.

34 Cited in Urban Economics (2018), *Occupancy and Performance Appraisal: Early Childhood Education and Care Sector*, p. 34.

35 Information provided by Peter Fanous, Principal, Peritus Child Care Sales.

36 Property Council of Australia, *Office Market Report*, research.propertycouncil.com.au/data-room/office, accessed 20 June 2019 and reinsw.com.au/Web/Posts/Latest_News/2019/4._April/office_vacancy_rates_in_Sydney_hit_19-year_low.aspx, accessed 20 June 2019.

Flexibility of children's services delivery to respond to changing demands of parents

The Workplace Gender Equality Agency reports that 57 per cent of employers have flexible work practices and strategies in place and 27 per cent of employees were accessing these in 2018. Common work practices offered by employers included flexible work hours (63 per cent) and part-time work (84 per cent)³⁷. In March 2019 46 per cent of women in the workforce were working on a part-time basis, and some of this would be for child care related reasons³⁸.

There are increasing numbers of families who are working more flexibly and require access to flexible child care. In the current environment it is challenging for formal child care to provide flexible care. These challenges relate to the interplay between approved hours of operation, meeting child to staff ratios across the day, fixed wages and salary costs, and industrial relations frameworks. Operating outside standard business hours, assuming regulatory approval to do so, incurs additional staffing costs related to overtime or shift rates, and these are most often passed on to families through increased fees for care outside regular business hours.

A 2016 report³⁹ by the Australian Institute of Family Studies (AIFS) exploring child care and work place flexibility commented on the challenges families working flexibly had managing child care opening and closing times particularly with multiple children where long day care and before or after school care hours are not always compatible. Service closing times presented particular challenges for workers who may be subject to unexpected overtime, for example emergency services workers who cannot leave in the middle of an emergency when their shift finishes.

AIFS research reported that families wanted access to flexibility in child care bookings to change days and hours from week to week as their shifts changed. ECEC and OSHC services require a baseline of child utilisation to meet operating expenses⁴⁰. There is little financial capacity, unless the service is underutilised, to allow for unoccupied places if a shift worker does not require this care.

Child care as property investment

The long day care service property market comprises:

- single service owners – 40 per cent
- two to 25 service owners – 30 per cent
- 25+ service owners – 30 per cent.

There are a number of large private and ASX listed equity firms that have invested in child care centre properties. Child care centre property investment has historically had steady, higher yields compared to other commercial properties with one child care property firm quoting yields of 8 per cent in 2009 and 6 per cent in 2017⁴¹.

37 data.wgea.gov.au/industries/1#work_flex_content, accessed 7 May 2019.

38 Australian Bureau of Statistics (2019), *Labour Force, Australia*, Table 1. Labour force status by Sex, Australia.

39 aifs.gov.au/publications/flexible-child-care-and-australian-parents-work-and-care-decision-making/executive-summary, accessed 7 May 2019.

40 *ib id.*, accessed 7 May 2019.

41 charterkc.com.au/valuations/charter-insight-market-update-child-care/, accessed 7 May 2019.

Child care property investment is viewed as relatively low risk due to ongoing demand for child care, and long-term tenancy agreements usually of 10 to 15 years duration with a number of five-year options beyond this.

Targeting child care property investors is also one way that private/commercial child care providers can raise capital for business consolidation or expansion. Some child care investors buy properties and lease them back to the original vendor.

Large providers now comprise around 15 per cent of the total child care market for long day care and OSHC. One ASX listed child care property investor, Charter Hall Social Infrastructure REIT, currently has 410 early learning properties leased to 29 tenants in Australia and New Zealand. Goodstart Early Learning, the largest not-for-profit provider in Australia with 644 centres, leases 50 per cent of these properties; and G8, the largest ASX listed company with 519 long day care centres leases 8 per cent of these properties⁴².

With the tightening of bank lending post the Royal Commission into Misconduct in the Banking, Superannuation and Financial Services Industry, it is likely that some of these private equity firms may be more cautious about investment, potentially impacting on supply in areas of demand.

Investment in child care providers

There is also a high level of interest from private equity firms in investment in child care provision. This is mostly targeted to large providers. Recent examples include:

- Junior Adventures Group (JAG) the largest OSHC provider in Australia – the equity funder viewed the business as having a strong market position, in a growth industry, and limited capital assets to manage⁴³
- Only About Children and Guardian Early Learning Group, both long day care providers.

Some private child care providers are on a growth strategy whose primary focus is to position the business for sale or equity investments sometime in the future.

Summary

Social and economic drivers will continue to influence the City of Sydney child care market place and it is most likely that the market will continue to respond to increases in the child population for working parents.

The market is less likely to respond to the needs of those families who have less capacity to pay for child care, such as those families with tenuous workforce engagement or those experiencing vulnerability of disadvantage and find it difficult to meet the work activity test required for Child Care Subsidy eligibility. The City has a strong role to play in continuing to target these child and families through its direct service provision and the AGP.

The City may also want to consider purchasing other properties in the future in locations where places for children and families experiencing vulnerability or disadvantage may be located.

42 charterhall.com.au/investor/all-funds/cqe/property-portfolio, accessed 7 May 2019.

43 afr.com/companies/financial-services/quadrant-eyes-20pc-growth-with-junior-adventures-afterschool-care-buyout-20180613-h11bcv, accessed 7 May 2019.

6. The City's resident profile

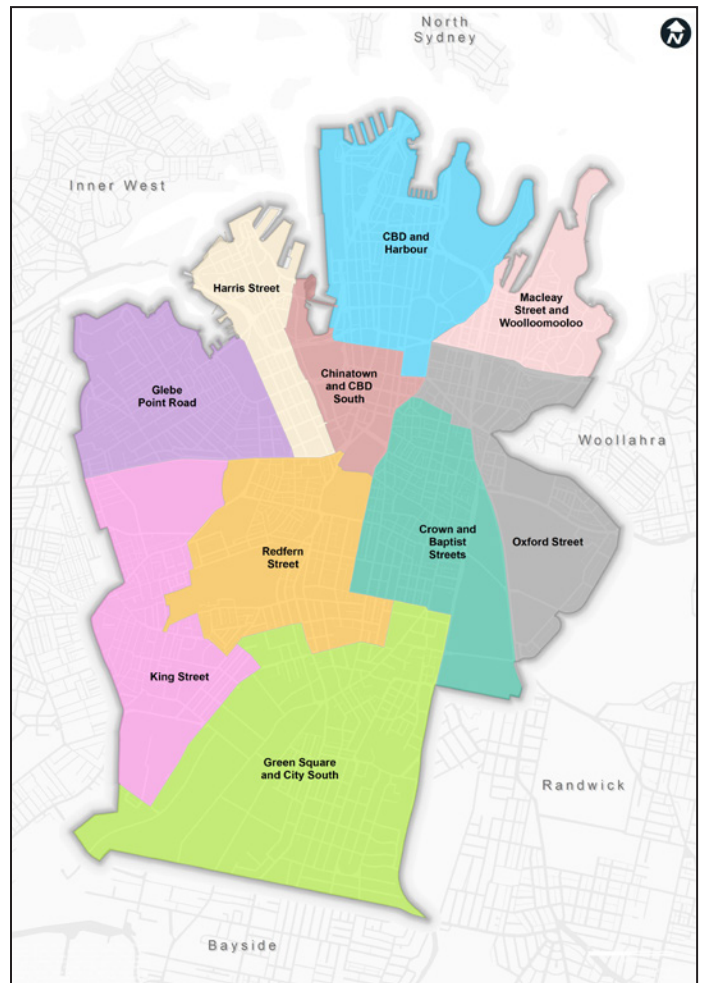
This section reviews the current (2018) and future (2036) child populations by local area and village areas for the City of Sydney. Data on child vulnerability reported by the Australian Early Development Census (AEDC) is also included.

The City of Sydney comprises 10 Village areas defined by unique characteristics and qualities. The Village areas are:

- CBD and Harbour
- Chinatown and CBD South
- Crown and Baptist Streets
- Glebe Point Road
- Green Square and City South
- Harris Street
- King Street
- Macleay Street and Woolloomooloo
- Oxford Street and
- Redfern Street.

Information about public school catchment areas (see Appendix B) and feedback from eight schools is included in each Village summary.

It was not possible to obtain data relating to future Department of Education school populations. The Director, Schools Planning, School Infrastructure indicated that the Department anticipated “there will be sufficient capacity in both our primary and secondary schools to 2031”⁴⁴.



⁴⁴ Email received 13 May 2019, 2.47pm from Director, Schools Planning, School Infrastructure NSW, Strategic Planning, Department of Education and Training.

Current and future population – City of Sydney

Population

In 2018 the City of Sydney had an estimated resident population (ERP) of 240,229 people. This is expected to grow by approximately 96,000 residents to 339,498 in 2036; an increase of 40.9 per cent.

All City Villages are predicted to have increased population in the period 2018 to 2036, with CBD and Harbour doubling, and Green Square, and Chinatown & City South more than doubling in population. The following table shows the population changes in each Village area.

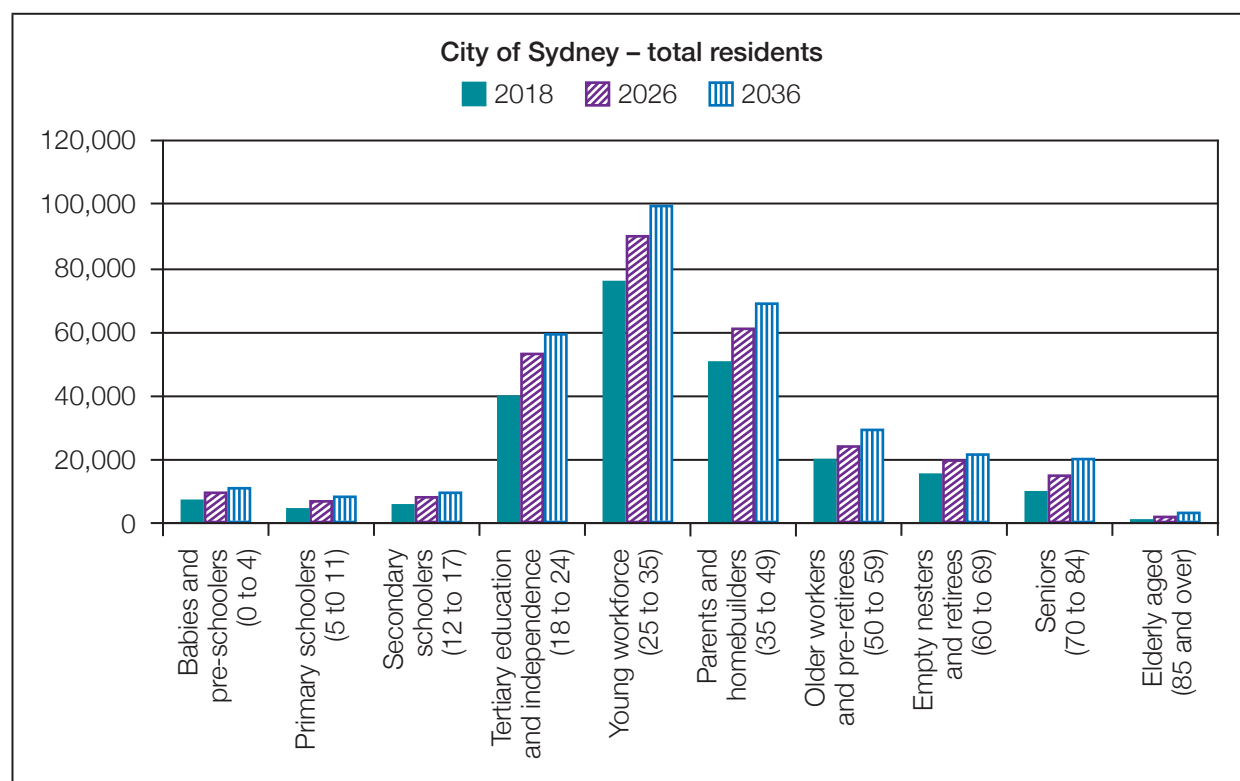
Table 10. City of Sydney Village area's current and future population

	2018 ERP	2036 Estimate	Change	Per cent change
CBD & Harbour	9,464	19,359	9,895	104.6%
Chinatown & CBD South	22,218	37,593	15,375	69.2%
Crown & Baptist Streets	23,807	28,883	5,076	21.3%
Glebe Point Road	25,935	27,572	1,637	6.3%
Green Square & City South	37,473	77,124	39,651	105.8%
Harris Street	21,168	24,550	3,382	16.0%
King Street	23,472	30,564	7,092	30.2%
Macleay Street & Woolloomooloo	23,948	23,802	-146	-0.6%
Oxford Street	20,915	21,102	187	0.9%
Redfern Street	31,772	48,949	17,177	54.1%
LGA	240,229	339,498	99,269	41.3%

Source: Community Profile; Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

The following table shows the predicted population profile in the City of Sydney from 2018 to 2036.

Table 11. City of Sydney forecast age structure by service age groups



Source: Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

There are predicted increases in population for:

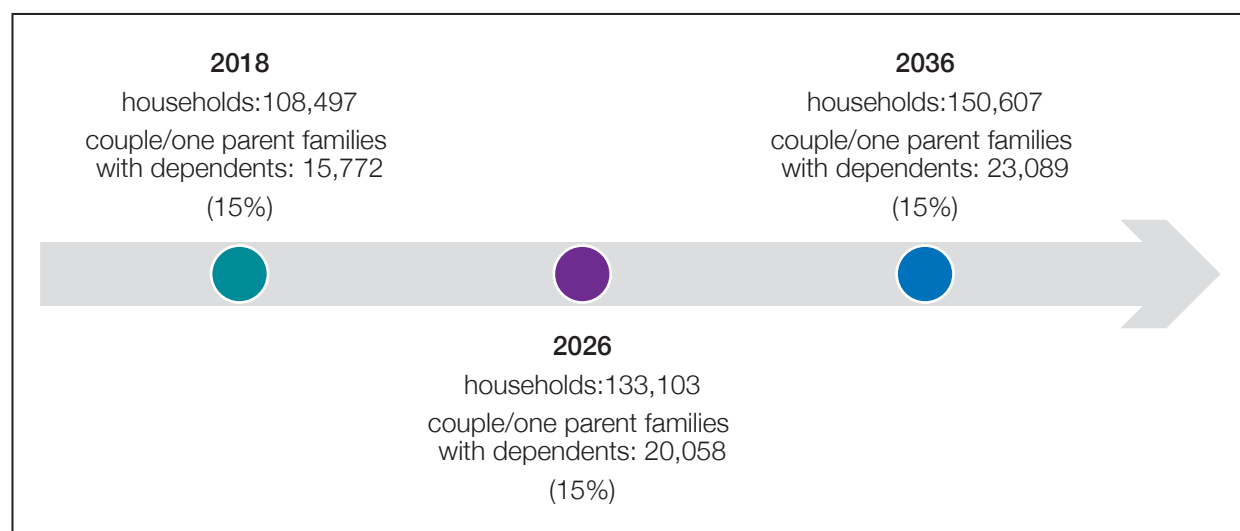
- babies and preschoolers (birth to four years) from 8,559 children in 2018 to 12,210 children in 2036
- primary schoolers (five to 11 years) from 6,174 children in 2018 to 9,677 children in 2036 and
- parents and homebuilders (35 to 49 years), those most likely to be in the age range of child bearing and rearing, from 50,861 residents in 2018 to 69,845 residents in 2036.

This supports ongoing and sustained demand for ECEC and OSHC services to 2036 in the local area.

Households

There is a predicted increase in households in the City of Sydney.

Table 12. City of Sydney – households



Source: Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

While there will be an overall increase in the number of residents with dependents, the proportion of couple or one parent families with dependents will remain at about 15 per cent of all family types. Some of these households will include children aged from birth to 12 years.

Australian Early Developmental Census

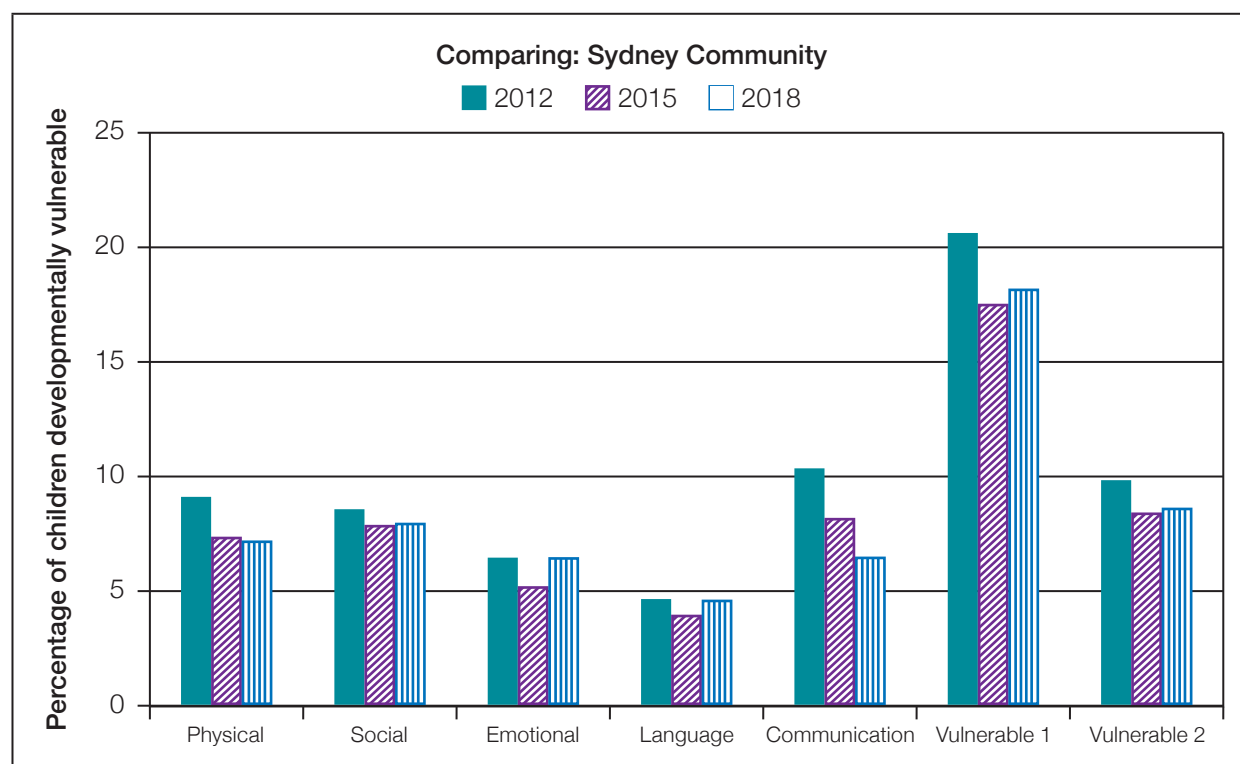
The AEDC is a nationwide triennial survey of children in their first year of full-time school; 2018 was the fourth wave of the survey. Teachers of children in their first year of school complete a survey on each child over five developmental domains. These domains are:

- physical health and well-being
- social competence
- emotional maturity
- language and cognitive skills and
- communication skills and general knowledge

These domains are key predictors of effective learning, academic success, overall health and well-being in later years. The AEDC is a useful tool when considering gaps and opportunities for ECEC service delivery.

The following graph shows the proportion of children in the City of Sydney who are considered developmentally vulnerable in specific domains. It also shows the proportion of children who are considered vulnerable in one or more, or two or more domains. To be considered developmentally vulnerable a child would have scored in the lowest 10 per cent of the national AEDC population.

Table 13. City of Sydney Percentage of Children Developmentally Vulnerable in 2018



Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

In the period 2012 to 2018 the proportion of children in the City who are considered developmentally vulnerable in specific domains decreased in two domains only – physical health and well-being, and communication skills and general knowledge; all other domains decreased slightly in the period 2012 to 2015, then increased in 2018 back to the 2012 level. While there was an overall decrease in the proportion of children vulnerable in one or more, or two or more domains both proportions increased in the period 2015 to 2018 to just below the 2012 levels. Further research may enable the City to understand why this increase occurred.

In 2018 around one in 10 Australian children commenced school developmentally vulnerable in two or more domains, and one in five children commenced school developmentally vulnerable in one or more domains. Participation in high quality ECEC can assist those children who are developmentally vulnerable in closing the gap with their peers. Children who may be experiencing vulnerability or disadvantage had improved scores in reading, writing and mathematics from participation in the appropriate dose of high quality early education programs⁴⁵.

Children in the City of Sydney are less developmentally vulnerable when compared with all Australian children; however there are differences in developmental vulnerability across different City suburbs as the following table shows.

45 Fox, S and Geddes, M. (2016). *Preschool – Two Years are Better Than One: Developing a Preschool Program for Australian 3 Year Olds – Evidence, Policy and Implementation*, Mitchell Institute Policy Paper No. 03/2016. Mitchell Institute, Melbourne. Available from: mitchellinstitute.org.au, p. 26, accessed 1 May 2019.

Table 14. City of Sydney suburbs – percentage of children developmentally vulnerable in 2018

	Number of children	Percentage of children developmentally vulnerable (%)						
		Physical health and wellbeing [†]	Social competence	Emotional maturity	Language and cognitive skills (school based)	Communication skills and general knowledge	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
Australia	308,953	9.6	9.8	8.4	6.6	8.2	21.7	11
New South Wales	98,020	8.5	9.2	6.8	5.2	8	19.9	9.6
Sydney community	1,056	7.2	8	6.5	4.6	6.5	18.1	8.6
Alexandria/Beaconsfield	85	2.4	2.4	4.8	7.2	3.6	10.8	4.8
Camperdown	46	20.9	7	11.6	2.3	7.1	31	14
Central Sydney	62	3.4	5.1	1.7	0	5.1	10.2	3.4
Darlinghurst	32	0	6.3	3.1	3.1	0	6.3	3.1
Erskineville/Eveleigh	93	7.7	6.6	7.7	5.5	8.8	15.4	8.8
Glebe/Forest Lodge	103	7	6	7	8	7	19	9
Newtown/Darlington/Chippendale	119	11.9	5.9	9.3	1.7	2.5	20.3	6.8
Potts Point/Rushcutters Bay/Elizabeth Bay	46	0	9.1	4.5	6.8	2.3	13.6	4.5
Pymont	63	3.3	14.8	6.6	0	9.8	23	8.2
Redfern	74	1.4	5.6	4.2	2.8	4.2	8.3	5.6
Rosebery	73	6.9	9.7	9.7	6.9	8.3	27.8	8.3
Surry Hills	62	4.9	9.8	6.6	3.3	3.3	13.1	6.6
Ultimo/Haymarket	51	6.4	10.6	8.5	8.5	12.8	25.5	12.8
Waterloo	57	7.1	7.1	1.8	5.4	10.7	16.1	8.9
Woolloomooloo	25	29.2	29.2	16.7	16.7	20.8	45.8	41.7
Zetland	55	15.4	11.5	1.9	0	5.8	19.2	11.5

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 13 June 2019.

Almost 42 per cent of children living in Woolloomooloo are developmentally vulnerable in two or more domains (nearly four times the average of all Australian children) and 46 per cent are developmentally vulnerable in one or more domains (more than double the Australian average); the next closest in one domain is Rosebery at 27.8 per cent and in two domains is Ultimo/Haymarket as 12.8 per cent. This is in stark contrast to Darlinghurst where only three per cent of children are developmentally vulnerable in two or more domains and six per cent in one or more domains.

Ancestry

Residents in the City of Sydney come from diverse cultural backgrounds with those of English (23.4 per cent) and Chinese (17.4 per cent) ancestry comprising the largest population groups. The following table shows the top five ancestry groups in 2016 and 2011.

Table 15. Ancestry of City of Sydney – per cent of total people

	2016 Census	change	2011 Census
English	26.8%	=	28.5%
Chinese	19.9%	↑	14.3%
Australian	17.6%	↓	20.5%
Irish	11.8%	=	12.5%
Scottish	7.9%	=	8.6%

Source: profile id., Community Profile 2016 Census Results, Ancestry

The proportion of residents of Chinese ancestry has increased by five per cent from the 2011 to 2016 Census', and the proportion of those of Australian ancestry has declined slightly.

Household income

Resident household income is very disparate. In 2016 31.6 per cent of households earned more than \$2500 per week, while 18.2 per cent of households earned less than \$650 per week. This is slightly higher than the Greater Sydney area with 28.3 per cent and 15.1 per cent respectively. There was a slight increase in the proportion of households in the lowest earning quartile and a slight decrease in the proportion of households in the highest earning quartile in the period 2011 to 2016. The following table shows the proportion of City households in each quartile.

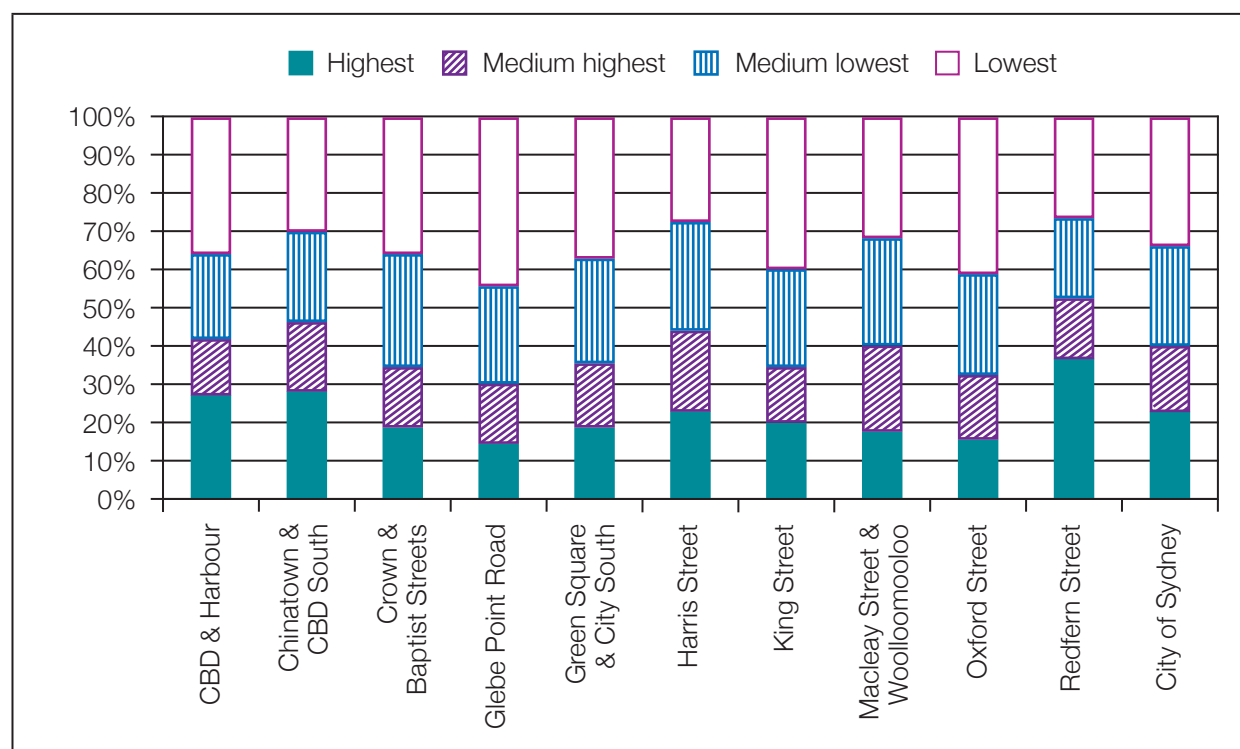
Table 16. Household income quartiles

	2016 Census	change	2011 Census
Lowest	22.8%	↑	21.6%
Medium lowest	17.3%	↓	18%
Medium highest	25.4%	↑	23.1%
Highest	34.5%	↓	37.3%

Source: profile id., Community Profile 2016 Census Results, Household income quartiles

Household income disparity continues across Villages as well. The following table shows the proportion of households by income quartiles. Villages with proportionally more households in the highest income quartiles were Glebe Point Road (45 per cent) and Oxford Street (41.1 per cent). The Villages with proportionally more households in the lowest quartiles were Redfern Street (36.2 per cent), followed by Chinatown & CBD South (27.7 per cent). The following table shows household income quartiles in 2016.

Table 17. Household income quartiles by Village



Source: profile id., Community Profile 2016 Census Results, Household income quartiles

Resident workers

In 2016 there were 117,206 resident workers in the City, just over half of the 2016 population; two thirds (64.5 per cent) of these resident workers worked in the City⁴⁶.

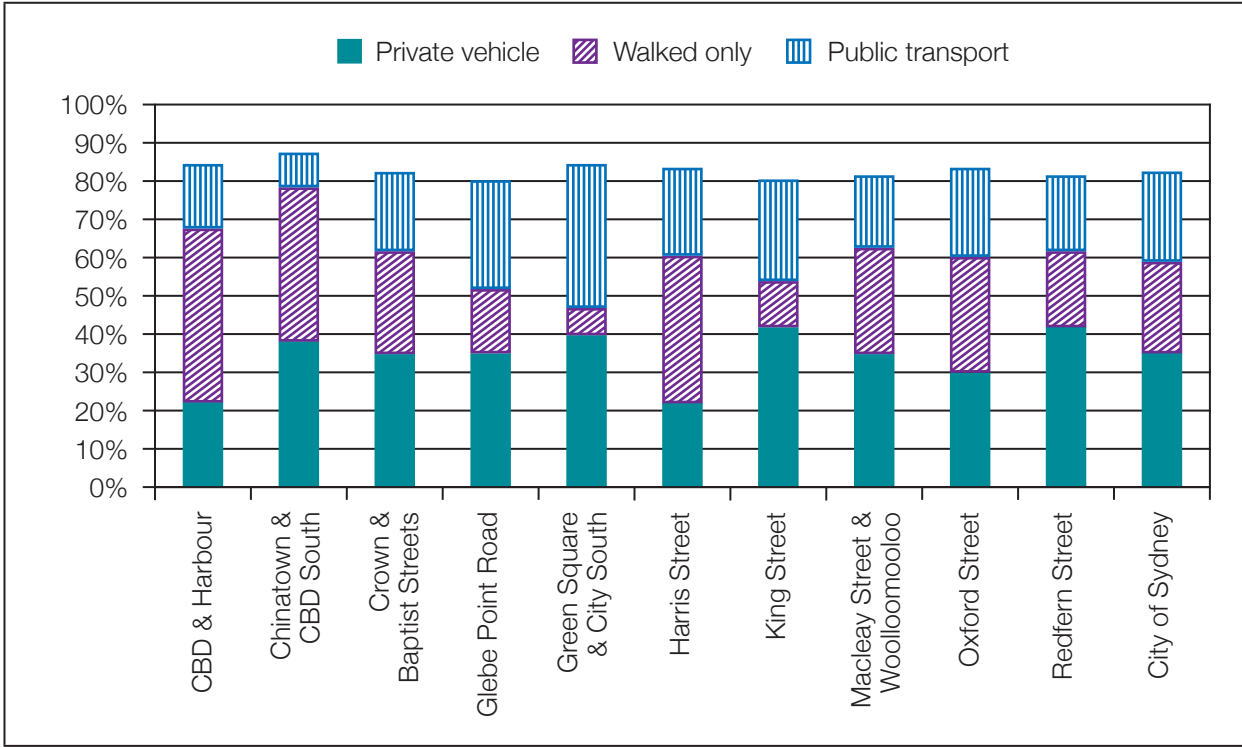
Resident workers used the following modes of transport in 2016.

- Public transport – 38.4 per cent
- Walked only – 26.0 per cent
- Private vehicle – 25.4 per cent⁴⁶

Preferred mode of travel to work varied by Village and proximity to CBD or larger work hubs. Resident workers in those Villages located closer to the Sydney CBD or other work hubs such as the Royal Prince Alfred health precinct and The University of Sydney opted to use public transport or walk to work. There was more private vehicle use in Villages with less public transport options and located further away from work hubs. Only 8.7 per cent of Chinatown & CBD South resident workers used private vehicles to get to work compared with 37.5 per cent of resident workers in Green Square & City South. The following table shows resident workers' modes of travel to work.

46 profile id., Community Profile 2016 Census Results, Residents' place of work and Method of travel to work.

Table 18. Method of travel to work by Village



Source: profile id., Community Profile 2016 Census

Village area analysis

CBD & Harbour

Population

The population in CBD & Harbour will more than double in the period 2018 to 2036 from 9,464 to 19,359 residents. The proportion of children aged from birth to four years and five to 11 years will increase slightly over the same period. The proportion of the population of parents and home builders, most likely to need access to ECEC or OSHC services will remain steady. The following table shows the population in 2018 and 2036.

Table 19. CBD & Harbour – current and future population

	2018		2036	
	Number		Number	Per cent change
Total population	9,464		19,359	
Change in population			9,895	104.6%
	Number	Per cent of population	Number	Per cent of population
Babies and pre-schoolers (0 to 4)	245	2.6%	583	3.0%
Primary schoolers (5 to 11)	138	1.4%	361	1.9%
Parents and homebuilders (35 to 49)	2,173	22.7%	4,383	22.6%

Source: Community Profile; Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

The 2016 Census showed that just over half of the resident population in the CBD and Harbour village area (51.2%) were in the workforce.

Households

In line with the doubling of the Village population, the number of households in CBD & Harbour will also increase by over 50 per cent in the period 2018 to 2036. While the population will increase, the proportion of couple or one parent families with dependents will remain steady at about 12 per cent of all family types. The following table shows the number of households in 2018 and 2036.

Table 20. CBD & Harbour – households

	2018	2026	2036
Total households	4,388	7,847	9,449
Couple/one parent families with dependents			
Number	526	981	1,184
Per cent of households	12.0%	12.5%	12.5%

Source: Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

Public school catchment and OSHC capacity

CBD & Harbour falls into the catchment area of one public school shown in the table below.

Table 21. Public primary schools located in CBS & Harbour Village

NSW Department of Education catchment area	2012 child population	2018 child population	Change in population	OSHC provider to school
Fort Street Public School				
All within the Village	99	220	+121	Two providers – Fort Street OSHCLUB, King George V Children's Program – providing 75 child places for after school care and vacation care, and 45 places for before school care. OSHC providers indicated that there were vacancies for before school care and vacation care. One service provider was at full capacity for after school care, wanting to expand after school care places, however this was not an option due to physical space constraints

Source: myschool.edu.au; ECEC and OSHC service survey

Information provided by Fort Street Public School indicates that the school anticipates child numbers continuing to increase slowly, placing some pressure on after school care and vacation care. The school considered both service providers as essential services to the school and local community, and wanted to ensure that OSHC places were available as the child population increased over time.

Other schools in this Village include St Andrews Cathedral School that also has a specialised Indigenous program Gawura School; and St Mary's Cathedral College. These schools do not provide separate data on K to 6 child populations.

Australian Early Developmental Census

Children living in CBD & Harbour were less developmentally vulnerable over time with proportionally less children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table shows the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains. To be considered developmentally vulnerable a child would have scored in the lowest 10 per cent of the national AEDC population.

Table 22. AEDC – Central Sydney area covering CBD & Harbour and Chinatown & CBD South

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	27.1%	8.2%
2015	14.3%	4.8%
2018	10.2%	3.4%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

In this period, proportions of children in all developmental domains decreased except for social competence which measured:

- in 2012: 4.1 per cent of the child population
- in 2015: 2.4 per cent of the child population and
- in 2018: 5.1 per cent of the child population.

Fort Street Public School has not noted any changes to the numbers or nature of families experiencing vulnerability or disadvantage attending the school. And one private school noted that:

“[there are] an increasing number of families putting their children into out of school care for longer hours, from a younger age. Very often from Kindergarten age we have children in [OSHC] to 6pm every day of the week. More parents are wanting before school care as well so they can get into and out of the city at earlier times to beat the traffic. More students presenting with emotional, social and language needs which means the quality of the out of school care needs to be improved”

Chinatown & CBD South

Population

The population in Chinatown & CBD South will increase by nearly 70 per cent in the period 2018 to 2036 from 22,218 to 37,593 residents. The proportion of children aged from birth to four years and five to 11 years will remain steady at 2.8 per cent and 1.4 per cent respectively. The proportion of the population who are parents and home builders, most likely to need access to ECEC or OSHC services will increase slightly from 17 per cent to 18.1 per cent. The following table shows the population in 2018 and 2036.

Table 23. Chinatown & CBD South – current and future population

	2018		2036	
	Number		Number	Per cent change
Total population	22,218		37,593	
Change in population			15,375	69.2%
	Number	Per cent of population	Number	Per cent of population
Babies and pre-schoolers (0 to 4)	688	2.8%	1,056	2.8%
Primary schoolers (5 to 11)	340	1.4%	520	1.4%
Parents and homebuilders (35 to 49)	4,118	17.0%	6,792	18.1%

Source: Community Profile; Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

The 2016 Census showed that just over half of the resident population in the Chinatown and CBD South village area (50.2%) were in the workforce.

Households

The number of households in Chinatown and CBD South will increase by just over 60 per cent in the period 2018 to 2036. While the population will increase, the proportion of couple or one parent families with dependents will increase slightly from 13.9 per cent to 15.8 per cent of all family types. The following table shows the number of households in 2018 and 2036.

Table 24. Chinatown & CBD South – households

	2018	2026	2036
Total households	7,975	10,783	12,474
Couple/one parent families with dependents			
Number	1,106	1,618	1,967
Per cent of households	13.9%	15.0%	15.8%

Source: Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

Public school catchment and OSHC capacity

Chinatown and CBD South falls across three public school areas. These are:

- Crown Street Public School – the triangle bounded by Wentworth Avenue, and Elizabeth and Liverpool Streets (reported in Crown & Baptist Streets Village area)
- Fort Street Public School – the eastern part of the Village to Harbour and Day Streets to Central Station (reported in CBD & Harbour Village area) and
- Ultimo Public School – the western part of the Village to Pyrmont Street (reported in Harris Street Village area).

Australian Early Developmental Census

Children living in Chinatown & CBD South were less developmentally vulnerable over time with proportionally less children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table shows the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains. To be considered developmentally vulnerable a child would have scored in the lowest 10 per cent of the national AEDC population.

Table 25. AEDC – Ultimo/Haymarket

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	41.9%	22.6%
2015	33.3%	11.1%
2018	25.5%	12.8%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

In the period 2012 to 2018 there are less children developmentally vulnerable in two or more domains, however there was a small increase in the proportion of children developmentally vulnerable in two or more domains from 2015 to 2018.

In this period, proportions of children in all developmental domains decreased except for language and cognitive skills which measured:

- in 2012: 3.2 per cent of the child population
- in 2015: 7.4 per cent of the child population and
- in 2018: 8.5 per cent of the child population.

Crown & Baptist Streets

Population

The population in Crown & Baptist Street will increase by 21.3 per cent in the period 2018 to 2036 from 23,807 to 28,883 residents. The proportion of children aged from birth to four years and five to 11 years will increase very slightly by 0.1 per cent for each age group. The proportion of the population of parents and home builders, most likely to need access to ECEC or OSHC services will decrease slightly by 1.1 per cent from 23.8 per cent to 22.7 per cent. The following table shows the population in 2018 and 2036.

Table 26. Crown & Baptist Streets – current and future population

	2018		2036	
	Number		Number	Per cent change
Total population	23,807		28,883	
Change in population			5,076	21.3%
	Number	Per cent of population	Number	Per cent of population
Babies and pre-schoolers (0 to 4)	812	3.4%	1,015	3.5%
Primary schoolers (5 to 11)	593	2.5%	759	2.6%
Parents and homebuilders (35 to 49)	5,641	23.8%	6,543	22.7%

Source: Community Profile; Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

The 2016 Census showed that just over half of the resident population in the Crown and Baptist Streets village area (52.5%) were in the workforce.

Households

The number of households in Crown & Baptist Streets will increase by 20 per cent in the period 2016 to 2036. While the population will increase, the proportion of couple or one parent families with dependents will remain at about 12.5 per cent of all family types. The following table shows the number of households in 2016 and 2036.

Table 27. Crown & Baptist Streets – households

	2018	2026	2036
Total households	11,488	12,648	14,025
Couple/one parent families with dependents			
Number	1,425	1,578	1,780
Per cent of households	12.4%	12.5%	12.7%

Source: Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

Public school catchment and OSHC capacity

Crown & Baptist Streets falls across four public school areas. The table below shows the schools in this Village area.

Table 28. Public primary schools located in Crown & Baptist Streets Village

NSW Department of Education catchment area	2012 child population	2018 child population	Change in population	OSHC provider to school
Alexandria Park Community School				
The western side of the Village	381	804	+424	One provider – Camp Australian – with 80 places for before, after and vacation care. After school care is operating at full capacity with a waiting list; both before school care and vacation care are operating at 50 per cent capacity
Bourke Street Public School				
All within the Village	136	443	+307	Three providers – Helping Hands Bourke Street, Surry Hills Children's Program (after school care) and Girls and Boys Brigade (vacation care) – with at least 120 places for after school care and vacation care. One provider commented that the boundary changes to accommodate the relatively new Alexandria Park Community School had resulted in much of the social housing falling outside of the Bourke Street Public School boundary. They were concerned that the children from these changed areas may be increasingly marginalised at Bourke Street, and over represented at Alexandria Park resulting in less diversity of school population

NSW Department of Education catchment area	2012 child population	2018 child population	Change in population	OSHC provider to school
Crown Street Public School				
Triangle bounded by Wentworth Ave, and Elizabeth and Liverpool Streets	283	296	+13	Four providers – Surry Hills Neighbourhood Centre – Crown Street OSHC: ASC, Surry Hills Children's Program (after school care) and Girls and Boys Brigade (vacation care) – all providing up to 140 child places. The afterschool care program recently increased its places from 70 to 120 to meet increased demand from families. The school was able to provide the physical space needed for this expansion Walla Mulla Children's Program provides 30 before, after and vacation care places. This service has vacancies across the week
Gardeners Road Public School				
A one block width between Dank and Phillip Streets (reported in Green Square Village area)	264	360	+96	Reported in Green Square Village area

Alexandria Park Community School and Bourke Street Public School populations have grown over the past six years, and Crown Street Public School has a stable child population varying very little over the period 2012 to 2018.

Bourke Street Public School commented that its OSHC provider was very responsive to the growing demand for OSHC, particularly vacation care. The school was also concerned about increased numbers of students experiencing vulnerability or disadvantage. It particularly noted the services provided by the Girls & Boys Brigade and the City's Surry Hills Children's Program saying that they:

"cannot rate this service highly enough, they provide a multi layered support service that supports children, families and the community ... the staff are fantastic, the system is very thorough, they are very well trained, and really support families that would otherwise fall through the gap. It is a very popular service [and is] well targeted ... They not only provide educational assistance, but they help families with welfare issues, and will alert me to issues that I would not otherwise be aware of, which helps me (and the child/ren) greatly"

OSHC services believed that the area was well catered for OSHC.

Australian Early Developmental Census

Children living in Crown & Baptist Streets were less developmentally vulnerable over time with proportionally less children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table shows the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains. To be considered developmentally vulnerable a child would have scored in the lowest 10 per cent of the national AEDC population.

Table 29. AEDC – Surry Hills area

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	24.5%	14.6%
2015	22.6%	15.1%
2018	13.1%	6.3%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

In this period, proportions of children in all developmental domains decreased.

Glebe Point Road

Population

The population in Glebe Point Road will increase by 6.3 per cent in the period 2018 to 2036 from 25,935 to 27,572 residents. The proportion of children aged from birth to four years will decrease slightly by 0.2 per cent, and increase slightly by 0.2 per cent for children aged five to 11 years in the same period. The proportion of the population of parents and home builders, most likely to need access to ECEC or OSHC services will also remain steady at just over 19 per cent. The following table shows the population in 2018 and 2036.

Table 30. Glebe Point Road – current and future population

	2018		2036	
	Number		Number	Per cent change
Total population	25,935		27,572	
Change in population			1,637	6.3%
	Number	Per cent of population	Number	Per cent of population
Babies and pre-schoolers (0 to 4)	959	3.7%	976	3.5%
Primary schoolers (5 to 11)	860	3.3%	975	3.5%
Parents and homebuilders (35 to 49)	5,097	19.8%	5,290	19.2%

Source: Community Profile; Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

The 2016 Census showed that just under half of the resident population in the Glebe Point Road village area (48.2%) were in the workforce.

Households

The number of households in Glebe Point Road will increase by nine per cent in the period 2018 to 2036. While the population will increase, the proportion of couple or one parent families with dependents will remain steady at just over 17 per cent of all family types. The following table shows the number of households in 2018 and 2036.

Table 31. Glebe Point Road – households

	2018	2026	2036
Total households	11,826	12,696	12,975
Couple/one parent families with dependents			
Number	2,107	2,275	2,290
Per cent of households	17.8%	17.9%	17.6%

Source: Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

Public school catchment and OSHC capacity

The Village of Glebe Point Road falls across two public school areas. The table below shows the schools in this Village area.

Table 32. Primary schools located in Glebe Point Road Village

NSW Department of Education catchment area	2012 child population	2018 child population	Change in population	OSHC provider to school
Forest Lodge Public School				
Mostly within the Village with a small part west of Booth Street falling into Inner West Council	310	333	+23	One provider – FLASCA – with 60 before school care places, 130 after school care places and 100 vacation care places. This service also caters for students from St James. Currently there are vacancies in all areas
Glebe Public School				
With a very small rectangle across Broadway that falls into Redfern Street	130	292	+162	One provider – Centipede @ Glebe School Inc – with 70 places for before, after and vacation care. The after school care is full with a waiting list. It has vacancies for before school care and vacation care
St James Catholic Primary School				
N/A	98	152	+54	Two providers – FLASCA and Whoosh Care Glebe. Whoosh has 28 places for after school care program only. Vacancies every day

There is one other school located in the area – The International Grammar School catering for year K to 12 (it is not possible to determine K to 6 population).

There were varied perceptions of over and under supply with the service at Glebe believing there was an under supply, and Forest Lodge and St James was adequate.

Australian Early Developmental Census

Children living in Glebe Point Road are more developmentally vulnerable over time with proportionally more children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table shows the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains. To be considered developmentally vulnerable a child would have scored in the lowest 10 per cent of the national AEDC population.

Table 33. AEDC – Glebe/Forest Lodge

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	15.8%	6.3%
2015	14.0%	8.1%
2018	19.0%	9.0%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

In this period, proportions of children in all developmental domains increased except for emotional maturity.

- Physical health and well-being from 6.3 per cent in 2012 to seven per cent in 2018
- Social competence from 5.3 per cent in 2012 to six per cent in 2018
- Language and cognitive skills from 4.2 per cent in 2012 to eight per cent in 2018
- Communication skills and general knowledge from 6.3 per cent in 2012 to seven per cent in 2018

Green Square & City South

Population

The population in Green Square & City South will more than double in the period 2018 to 2036 from 37,473 to 77,124 residents. The proportion of children aged from birth to four years will remain steady at 4.9 per cent, and children aged five to 11 years will increase slightly from 2.9 per cent to 3.8 per cent. The proportion of the population of parents and home builders, most likely to need access to ECEC or OSHC services will increase slightly from 20 per cent to 21 per cent. The following table shows the population in 2018 and 2036.

Table 34. Green Square & City South – current and future population

	2018		2036	
	Number		Number	Per cent change
Total population	37,473		77,124	
Change in population			39,651	105.8%
	Number	Per cent of population	Number	Per cent of population
Babies and pre-schoolers (0 to 4)	1,905	4.9%	3,763	4.9%
Primary schoolers (5 to 11)	1,118	2.9%	2,908	3.8%
Parents and homebuilders (35 to 49)	7,791	20.0%	16,215	21.0%

Source: Community Profile; Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

The 2016 Census showed that more than half of the resident population in the Green Square and City South village area (54.2%) were in the workforce.

Households

The number of households in Green Square & City South will double in the period 2018 to 2036. While the population will increase, the proportion of couple or one parent families with dependents will remain steady at just over 18 per cent of all family types. The following table shows the number of households in 2018 and 2036.

Table 35. Green Square & City South – households

	2018	2026	2036
Total households	17,246	27,672	33,528
Couple/one parent families with dependents			
Number	3,175	5,125	6,314
Per cent of households	18.4%	18.5%	18.8%

Source: Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

Public school catchment and OSHC capacity

Green Square & City South falls across two public school areas. The table below shows the schools in this Village area.

Table 36. Primary schools located in Green Square & City South Village

NSW Department of Education catchment area	2012 child population	2018 child population	Change in population	OSHC provider to school
Erskineville Public School				
A small part between Euston Road and the canal (reported in King Street Village area)				One provider – Gowrie NSW Erskineville OSHC – with 130 before, after and vacation care places. There were vacancies on all days across the week
Gardeners Road Public School				
Falling mostly in this Village	264	360	+96	One OSHC provider with 60 approved places. (This service did not respond to the market survey)
Our Lady of Mount Carmel Catholic Primary School				
N/A	130	87	-43	One provider – SCEGS OSHC Waterloo – with 45 after school care places. This service had limited vacancies on a few days in the week

The City of Sydney is working with the Department of Education on plans for a new school at Joynton Avenue in Zetland, located next to the Green Square Community & Cultural Precinct.

Australian Early Developmental Census

Green Square & City South mostly aligns with the following AEDC areas – Alexandria/Beaconsfield, Redfern, Rosebery, Waterloo and Zetland. These areas are reported here.

Alexandria/Beaconsfield

Children living in Alexandria/Beaconsfield are less developmentally vulnerable over time with proportionally less children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table shows the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains.

Table 37. AEDC – Alexandria/Beaconsfield

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	15.8%	7.0%
2015	5.6%	1.9%
2018	10.8%	4.8%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

While proportionally less children were developmentally vulnerable in the period 2012 to 2018 there was an increase in the proportion of children developmentally vulnerable from 2015 to 2018.

In this period, proportions of children in all developmental domains decreased except for:

- emotional maturity from 3.5 per cent in 2012 to 4.8 per cent in 2018 and
- language and cognitive skills (school-based) from 4.8 per cent in 2012 to 7.2 per cent in 2018.

Redfern

Children living in Redfern are less developmentally vulnerable over time with proportionally less children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table shows the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains.

Table 38. AEDC – Redfern

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	21.4%	8.8%
2015	14.5%	9.1%
2018	8.3%	5.6%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

In this period, proportions of children in all developmental domains decreased except for:

- social competence from 3.5 per cent in 2012 to 5.6 per cent in 2018.

Rosebery

Children living in Rosebery are more developmentally vulnerable over time with proportionally more children being vulnerable in one or more domains. There are proportionally less children being vulnerable in two or more domains in the period 2012 to 2018. The following table shows the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains.

Table 39. AEDC – Rosebery

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	20.8%	13.2%
2015	21.3%	10.7%
2018	27.8%	8.3%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

In this period, proportions of children in developmental domains that increased were:

- physical health and well-being from 6.5 per cent in 2012 to 6.9 per cent in 2018
- emotional maturity from 5.3 per cent in 2012 to 9.7 per cent in 2018 and
- language and cognitive skills from 6.5 per cent in 2012 to 6.9 per cent in 2018.

Waterloo

Children living in Waterloo are less developmentally vulnerable over time with proportionally less children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table shows the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains.

Table 40. AEDC – Waterloo

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	40.8%	30.6%
2015	28.3%	19.6%
2018	16.1%	8.9%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

All developmental domains decreased in the period 2012 to 2018.

Zetland

Children living in Zetland are more developmentally vulnerable over time with proportionally more children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table shows the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains.

Table 41. AEDC – Zetland

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	16.7%	3.3%
2015	28.9%	15.6%
2018	19.2%	11.5%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

In this period, proportions of children in developmental domains that increased were:

- physical health and well-being from 3.3 per cent in 2012 to 15.4 per cent in 2018 and
- social competence from 10 per cent in 2012 to 11.5 per cent in 2018.

Harris Street

Population

The population in Harris Street will grow by 16 per cent in the period 2018 to 2036 from 21,168 to 24,550 residents. The proportion of children aged from birth to four years will decrease slightly from 4.2 per cent to 3.8 per cent, and children aged five to 11 years will remain steady. The proportion of the population of parents and home builders, most likely to need access to ECEC or OSHC services will decrease slightly from 21.1 per cent to 19.9 per cent. The following table shows the population in 2018 and 2036.

Table 42. Harris Street – current and future population

	2018		2036	
	Number		Number	Per cent change
Total population	21,168		24,550	
Change in population			3,382	16.0%
	Number	Per cent of population	Number	Per cent of population
Babies and pre-schoolers (0 to 4)	848	4.2%	938	3.8%
Primary schoolers (5 to 11)	643	3.2%	806	3.3%
Parents and homebuilders (35 to 49)	4,285	21.1%	4,894	19.9%

Source: Community Profile; Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

The 2016 Census showed that just over half of the resident population in the Harris Street village area (52.2%) were in the workforce.

Households

The number of households in Harris Street will increase by around 20 per cent in the period 2018 to 2036. While the population will increase, the proportion of couple or one parent families with dependents will remain steady at just under 19 per cent of all family types. The following table shows the number of households in 2018 and 2036.

Table 43. Harris Street – households

	2018	2026	2036
Total households	8,629	9,242	10,478
Couple/one parent families with dependents			
Number	1,623	1,735	1,958
Per cent of households	18.8%	18.8%	18.7%

Source: Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

Public school catchment and OSHC capacity

Harris Street falls in one public school area. The table below shows the school in this Village area.

Table 44. Primary school located in Harris Street Village

NSW Department of Education catchment area	2012 child population	2018 child population	Change in population	OSHC provider to school
Ultimo Public School				
Covering the eastern part of the Village from Pyrmont Street	292	290	-2	Three providers – Pyrmont and Ultimo Children's Programs providing 75 places each in after school care and vacation care, and Kids Capers Ultimo OSHC with 35 before and 70 after school care places. The Children's Programs had limited vacancies and the other had 10 to 15 vacancies for after school care on three afternoons. Kids Capers had lots of vacancies Monday to Friday

Both OSHC services felt that the supply of OSHC was adequate in their area.

Australian Early Developmental Census

Children living in Harris Street are more developmentally vulnerable over time with proportionally more children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table shows the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains. To be considered developmentally vulnerable a child would have scored in the lowest 10 per cent of the national AEDC population.

Table 45. AEDC – Pyrmont

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	17.6%	7.3%
2015	11.5%	5.7%
2018	23.0%	8.2%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

In this period, proportions of children in all developmental domains decreased except for:

- social competence from 1.8 per cent in 2012 to 14.8 per cent in 2018
- emotional maturity from six per cent in 2012 to 6.6 per cent in 2018 and
- communication skills and general knowledge from 9.1 per cent in 2012 to 9.8 per cent in 2018.

King Street

Population

The population in King Street will grow by 30.2 per cent in the period 2018 to 2036 from 23,472 to 30,564 residents. The proportion of children aged from birth to four years and five to 11 years will decrease slightly by 0.4 per cent and 0.3 per cent respectively. The proportion of the population of parents and home builders, most likely to need access to ECEC or OSHC services will also decrease slightly from 23.8 per cent to 22 per cent. The following table shows the population in 2018 and 2036.

Table 46. King Street – current and future population

	2018		2036	
	Number		Number	Per cent change
Total population	23,472		30,564	
Change in population			7,092	30.2%
	Number	Per cent of population	Number	Per cent of population
Babies and pre-schoolers (0 to 4)	1,020	4.4%	1,215	4.0%
Primary schoolers (5 to 11)	904	3.9%	1,115	3.6%
Parents and homebuilders (35 to 49)	5,569	23.8%	6,727	22.0%

Source: Community Profile; Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

The 2016 Census showed that nearly three-fifths of the resident population in the King Street village area (58.7%) were in the workforce.

Households

The number of households in King Street will increase by around 20 per cent in the period 2018 to 2036. The proportion of couple or one parent families with dependents will remain steady at around 18 per cent of all family types. The following table shows the number of households in 2018 and 2036.

Table 47. King Street – households

	2018	2026	2036
Total households	10,405	11,840	13,257
Couple/one parent families with dependents			
Number	1,875	2,156	2,319
Per cent of households	18.0%	18.2%	17.5%

Source: Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

Public school catchment and OSHC capacity

King Street falls across three public school areas. The table below shows the schools in this Village area.

Table 48. Primary schools located in King Street Village

NSW Department of Education catchment area	2012 child population	2018 child population	Change in population	OSHC provider to school
Erskineville Public School				
A small part between Euston Road and the Alexandra canal	310	389	+79	One provider – Gowrie NSW Erskineville OSHC – with 130 places in before, after and vacation care. There is a waiting list for after school care
Newtown Public School				
Within King Street Village, crossing slightly into Redfern Street just north of Erskineville Station, and the western area from Australia Street falling into the Inner West Council local government area	298	407	+109	Two providers – Kids Capers Newtown VAC with 70 vacation care places, and Newtown Kids Cottage with 81 before and 154 after school care places. There is a waiting list for after school care only
Newtown North Public School				
Excluding Victoria Park and the area south of City Road to Forbes Street, which is in Redfern Street Village	261	278	+17	One provider – Newtown North OOSH Inc – with 110 places in before, after and vacation care. There are some vacancies for all options

NSW Department of Education catchment area	2012 child population	2018 child population	Change in population	OSHC provider to school
St Mary's Catholic Public School				
N/A	187	195	+8	One provider – St Mary's Erskineville OSHC Inc – with 56 places in before, after and vacation care. There is a waiting list for after school care, and the service has no capacity to expand

All OSHC services felt that there was an adequate supply of OSHC in the area.

Australian Early Developmental Census

King Street includes the AEDC areas of Camperdown and around 50 per cent of Newtown/Darlington/Chippendale. These areas are reported here.

Camperdown

Children living in Camperdown are more developmentally vulnerable over time with proportionally more children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table show the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains.

Table 49. AEDC – Camperdown

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	10.5%	2.6%
2015	20.5%	6.8%
2018	30.0%	14.0%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

Proportions of children increased in the following developmental domains:

- physical health and well-being from 2.6 per cent in 2012 to 20.9 per cent in 2018
- social competence from 2.6 per cent in 2012 to 7 per cent in 2018 and
- emotional maturity from 2.6 per cent in 2012 to 16 per cent in 2018.

Newtown/Darlington/Chippendale

Children living in Newtown/Darlington/Chippendale are more developmentally vulnerable over time with proportionally more children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table show the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains.

Table 50. AEDC – Newtown/Darlington/Chippendale

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	12.0%	5.1%
2015	17.4%	7.4%
2018	20.3%	6.8%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

Proportions of children increased in the following developmental domains:

- physical health and well-being from 6 per cent in 2012 to 11.9 per cent in 2018
- social competence from 3.4 per cent in 2012 to 5.9 per cent in 2018 and
- emotional maturity from 3.4 per cent in 2012 to 9.3 per cent in 2018.

Macleay Street & Woolloomooloo

Population

The population in Macleay Street & Woolloomooloo will marginally decline by 0.6 per cent in the period 2018 to 2036 from 23,948 to 23,802 residents. The proportion of children aged from birth to four years and five to 11 years will remain steady. The proportion of the population of parents and home builders, most likely to need access to ECEC or OSHC services will decrease slightly from 23.6 per cent to 22.2 per cent. The following table shows the population in 2018 and 2036.

Table 51. Macleay Street & Woolloomooloo – current and future population

	2018		2036	
	Number		Number	Per cent change
Total population	23,948		23,802	
Change in population			-146	-0.6%
	Number	Per cent of population	Number	Per cent of population
Babies and pre-schoolers (0 to 4)	530	2.3%	524	2.2%
Primary schoolers (5 to 11)	357	1.5%	385	1.6%
Parents and homebuilders (35 to 49)	5,490	23.6%	5,292	22.2%

Source: Community Profile; Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

The 2016 Census showed that just over half of the resident population in the Macleay Street and Woolloomooloo village area (53.1%) were in the workforce.

Households

The number of households in Macleay Street & Woolloomooloo will increase by three per cent in the period 2018 to 2036. The proportion of couple or one parent families with dependents will remain steady at about 7.5 per cent of all family types. The following table shows the number of households in 2018 and 2036.

Table 52. Macleay Street & Woolloomooloo – households

	2018	2026	2036
Total households	11,924	11,958	12,265
Couple/one parent families with dependents			
Number	874	949	935
Per cent of households	7.3%	7.9%	7.6%

Source: Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

Public school catchment and OSHC capacity

Macleay Street & Woolloomooloo falls across two public school areas. The table below shows the schools in this Village area.

Table 53. Primary schools located in Macleay Street & Woolloomooloo Village

NSW Department of Education catchment area	2012 child population	2018 child population	Change in population	OSHC provider to school
Darlinghurst Public School				
School boundary is split evenly at William Street & New South Head Road between the eastern side of this Village and the north east end of Oxford Street Village (reported in Oxford Street Village area)				Two providers – Darlo Play Centre with 120 before and after school care places. There are some vacancies across the week for both. Walla Mulla Children's Program provides 30 before, after and vacation care places. This service has vacancies across the week
Plunkett Street Public School				
All within Macleay Street and Woolloomooloo	51	46	-5	One provider – Woolloomooloo Children's Program – with 45 places in after school care and vacation care. There are no children on the waiting list at this service

The OSHC services felt that there was an adequate supply of OSHC in the area.

Australian Early Developmental Census

Macleay Street & Woolloomooloo includes the AEDC areas of Potts Point, Rushcutters Bay/Elizabeth Bay, and Woolloomooloo. These areas are reported here.

Rushcutters Bay/Elizabeth Bay

Children living in Potts Point, Rushcutters Bay/Elizabeth Bay are less developmentally vulnerable over time with proportionally less children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table show the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains.

Table 54. AEDC – Rushcutters Bay/Elizabeth Bay

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	21.4%	14.3%
2015	0.0%	0.0%
2018	13.6%	4.5%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

Proportions of children increased in the following developmental domains:

- emotional maturity from 3.6 per cent in 2012 to 4.5 per cent in 2018.

Woolloomooloo

Children living in Woolloomooloo are much more developmentally vulnerable than their counterparts on any other area of the City. The following table show the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains.

Table 55. AEDC – Woolloomooloo

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2018	45.8%	41.7%

NB: There is no data for 2-12 and 2015 as there were too few teachers and/or children to report on

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

Proportionally more Woolloomooloo children were measured as vulnerable in all domains.

- Physical health and well-being 29.2 per cent 2018
- Social competence 29.2 per cent in 2018
- Emotional maturity 16.7 per cent 2018
- Language and cognitive skills 16.7 per cent in 2018
- Communication skills and general knowledge 20.8 per cent 2018

Oxford Street

Population

The population in Oxford Street will only grow by 0.9 per cent in the period 2018 to 2036 from 20,915 to 21,201 residents. The proportion of children aged from birth to four years and five to 11 years will decrease slightly by 0.2 per cent for each age group. The proportion of the population of parents and home builders, most likely to need access to ECEC or OSHC services will slightly decline from 25.3 per cent to 23.7 per cent. The following table shows the population in 2018 and 2036.

Table 56. Oxford Street – current and future population

	2018		2036	
	Number		Number	Per cent change
Total population	20,915		21,102	
Change in population			187	0.9%
	Number	Per cent of population	Number	Per cent of population
Babies and pre-schoolers (0 to 4)	601	2.9%	562	2.7%
Primary schoolers (5 to 11)	547	2.7%	532	2.5%
Parents and homebuilders (35 to 49)	5,215	25.3%	4,993	23.7%

Source: Community Profile; Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

The 2016 Census showed that nearly 58.1% of the resident population in the Oxford Street village area were in the workforce.

Households

The number of households in Oxford Street will increase by three per cent in the period 2018 to 2036. While the population will increase, the proportion of couple or one parent families with dependents will remain steady at about 12 per cent of all family types. The following table shows the number of households in 2018 and 2036.

Table 57. Oxford Street – households

	2018	2026	2036
Total households	10,445	10,390	10,797
Couple/one parent families with dependents			
Number	1,292	1,279	1,299
Per cent of households	12.4%	12.3%	12.0%

Source: Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

Public school catchment and OSHC capacity

Oxford Street falls across three public school areas. The table below shows the schools in this Village area.

Table 58. Primary schools located in Oxford Street Village

NSW Department of Education catchment area	2012 child population	2018 child population	Change in population	OSHC provider to school
Crown Street Public School				
Between Eastern Distributor and Moore Park Road (reported in Crown & Baptist Street Village area)				<p>Four providers – Surry Hills Neighbourhood Centre – Crown Street OSHC: ASC, Surry Hills Children's Program (after school care) and Girls and Boys Brigade (vacation care) – all providing up to 140 child places. The afterschool care program recently increased its places from 70 to 120 to meet increased demand from families. The school was able to provide the physical space needed for this expansion</p> <p>Walla Mulla Children's Program provides 30 before, after and vacation care places. This service has vacancies across the week</p>

NSW Department of Education catchment area	2012 child population	2018 child population	Change in population	OSHC provider to school
Darlinghurst Public School				
School boundary is split fairly evenly at William Street & New South Head Road between the eastern side of Macleay Street & Woolloomooloo Village and the north east end this Village	232	322	+90	Two providers – Darlo Play Centre with 120 before and after school care places. There are some vacancies across the week for both. Walla Mulla Children's Program provides 30 before, after and vacation care places. This service has vacancies across the week
Paddington Public School				
Mostly within this Village with a very small part in Waverley local government area	261	279	+18	Two providers – Kids Capers Paddington VAC with 40 vacation care places and Paddington Out of School Hours Inc with 100 before and after school are places. There is a long waiting list for after school care, and while the vacation care program operates close to capacity it does have vacancies. The vacation care program would like to expand but there is not adequate space to do so
St Francis of Assisi Catholic Primary School				
N/A	224	209	-15	One provider – St Francis Regional Leisure Centre with 12 before school care and 45 after school care places; there is no vacation care. This service does not have a waiting list and operates with vacancies

Paddington Public School noted “a large increase in demand ... families now ask when they are making kindergarten enrolment enquiries what OSHC we offer, and whether they will be able to secure a place ... the issue for us is space- we have 2 classrooms dedicated to OSHC, but cannot offer any more ... what we need is a dedicated storey for OSHC & VC”

The general perception of supply from services was that it was adequate or a slight undersupply, particularly for vacation care.

Australian Early Developmental Census

Children living in Darlinghurst are more developmentally vulnerable over time with proportionally more children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table show the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains. To be considered developmentally vulnerable a child would have scored in the lowest 10 per cent of the national AEDC population.

Table 59. AEDC – Darlinghurst

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	3.7%	0.0%
2015	8.3%	2.8%
2018	6.3%	3.1%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

Proportions of children increased in the following developmental domains:

- emotional maturity from 2.8 per cent in 2015 to 3.1 per cent in 2018 and
- social competence from 2.8 per cent in 2015 to 6.3 per cent in 2018.

Redfern Street

Population

The population in Redfern Street will grow by over 50 per cent in the period 2018 to 2036 from 31,772 to 48,949 residents. The proportion of children aged from birth to four years will remain steady, and children aged five to 11 years will increase slightly from 2.2 per cent to 2.5 per cent. The population of parents and home builders, most likely to need access to ECEC or OSHC services will also remain steady at 17 per cent. . The following table shows the population in 2018 and 2036.

Table 60. Redfern Street – current and future population

	2018		2036	
	Number		Number	Per cent change
Total population	31,772		48,949	
Change in population			17,177	54.1%
	Number	Per cent of population	Number	Per cent of population
Babies and pre-schoolers (0 to 4)	951	3.1%	1,578	3.2%
Primary schoolers (5 to 11)	674	2.2%	1,315	2.7%
Parents and homebuilders (35 to 49)	5,481	17.6%	8,716	17.8%

Source: Community Profile; Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

The 2016 Census showed that less than half of the resident population in the Redfern Street village area (45.8%) were in the workforce.

Households

The number of households in Redfern Street will increase by two thirds in the period 2018 to 2036. While the population will increase, the proportion of couple or one parent families with dependents will increase slightly from 12.5 per cent to 14.2 per cent. The following table shows the number of households in 2018 and 2036.

Table 61. Redfern Street – households

	2018	2026	2036
Total households	14,170	18,028	21,362
Couple/one parent families with dependents			
Number	1,768	2,362	3,043
Per cent of households	12.5%	13.1%	14.2%

Source: Population and household forecasts, 2018 to 2036, prepared by .id, February 2019

Public school catchment and OSHC capacity

Redfern Street falls across five public school areas. The table below shows the schools in this Village area.

Table 62. Primary schools located in Redfern Street Village

NSW Department of Education catchment area	2012 child population	2018 child population	Change in population	OSHC provider to school
Alexandria Park Community School				
Covering the eastern half of Redfern Street (reported in Crown & Baptist Streets Village area)			K-12 school, separate data not available for K-6	One provider – Camp Australian – with 80 places for before, after and vacation care. After school care is operating at full capacity with a waiting list; both before school care and vacation care are operating at 50 per cent capacity
Darlington Public School				
All within the Redfern Street Village	236	228	-8	One provider – Darlington After Care & Vacation Care with 100 places in after school care and vacation care; there is no before school care. There are no waiting lists at this service
Erskineville Public School				
North of Swanston Street (reported in King Street Village area)	310	389	+79	One provider – Gowrie NSW Erskineville OSHC – with 130 places in before, after and vacation care. There is a waiting list for after school care
Glebe Public School				
Very small rectangle below Broadway (reported in Glebe Point Road)	130	292	+102	One provider – Centipede @ Glebe School Inc – with 70 places for before, after and vacation care. The after school care is full with a waiting list. It has vacancies for before school care and vacation care
Newtown North Public School				
(Reported in King Street Village area)	261	278	+17	One provider – Newtown North OOSH Inc – with 110 places in before, after and vacation care. There are some vacancies for all options

The OSHC services had mixed response to supply – some felt that there was an adequate supply and other an undersupply of OSHC in the area.

Australian Early Developmental Census

Children living in Erskineville/Eveleigh are less developmentally vulnerable over time with proportionally less children being vulnerable in one or more, or two or more domains in the period 2012 to 2018. The following table show the proportion of children who are considered developmentally vulnerable in one or more, or two or more domains. To be considered developmentally vulnerable a child would have scored in the lowest 10 per cent of the national AEDC population.

Table 63. AEDC – Erskineville/Eveleigh

	Vulnerable on one or more domains of the AEDC	Vulnerable on two or more domains of the AEDC
2012	25.4%	11.3%
2015	15.8%	6.6%
2018	15.4%	8.8%

Source: Australian Early Developmental Census, aedc.gov.au/data/data-explorer?id=135224, accessed 27 May 2019

Proportions of children increased in the following developmental domains:

- communication skills and general knowledge from 7 per cent in 2012 to 8.8 per cent in 2018.

Summary

The City of Sydney is estimated to increase its population by 41% in the period 2018 to 2036 with a commensurate increase in children aged from birth to four years and five to 11 years. The greatest growth will occur in the Villages of Green Square, Chinatown & CBD South, and CBD & Harbour.

In 2036 it is estimated that 15% of the population will comprise couple/one parent families with dependents.

City residents have disparate household incomes.

AEDC results show that children living in the City of Sydney are less developmentally vulnerable when compared with all children in Australian and NSW; however there are significant pockets of difference across City suburbs. The suburbs showing high proportions of developmentally vulnerable children include, Woolloomooloo, Ultimo/Haymarket and Rosebery.

There are 15 public primary schools and four Catholic Diocese schools that service the City local area.

Recommendations

The City undertakes further research into areas with higher than average proportions of children who are developmentally vulnerable to further inform child care strategies and local programs and services.

The City continues to monitor population growth in the City of Sydney local area and at a Village level.

7. Current ECEC and OSHC supply in the City of Sydney local area

The current supply of ECEC and OSHC services was sourced from ACECQA's National Registers, which contains information about approved education and care services and providers. This was supplemented with a market survey of children's services operating in the City of Sydney to gain further insights about local operations and trends, including the ages of children attending ECEC services.

All children's services catering for children aged from birth to 12 years of age in the City of Sydney were contacted by phone and email to complete a survey in April and May 2019; this included LDC, preschool, occasional care, before and after school care and vacation care. Family day care was not included. This survey had an 88 per cent response rate, with 126 of the 146 children's services responding.

City of Sydney Local Government Area

The following table summarises the ECEC and OSHC provision in the City of Sydney local area.

Table 64. Children's services in the City of Sydney local area

How many ECEC services?	How many places?	How many places by age?*
146 ECEC & OSHC services	9,476 places	Estimated break up of places
Long day care – 106	Long day care – 6,585	For children before they attend school
Total OSHC – 31	Total OSHC – 2,475	Birth-2yrs – 1,668
before school – 15	before school – 1,078	2-3yrs – 1,678
after school – 24	after school – 2,022	3-4yrs – 2,840
vacation – 20	vacation – 1,374	For children at primary school
Preschool – 9	Preschool – 416	5-12yrs – 2,475

*This is an estimate of age break up only, and an under representation of the number of places available for each age group as 20 services did not respond to the survey

Source: Families At Work

Number of ECEC and OSHC services and approved places by Village area

Children before they go to school

Number of services

The following table shows the number of services for children before they go to school by type and Village area.

Table 65. Number of ECEC services by Village area

	LDC + Occ Care	Preschool	Total number of services
CBD & Harbour	26	0	26
Chinatown & CBD South	3	0	3
Crown & Baptist Streets	8	2	10
Glebe Point Road	8	3	11
Green Square & City South	25	0	25
Harris Street	11	0	11
King Street	7	1	8
Macleay Street & Woolloomooloo	2	2	4
Oxford Street	6	0	6
Redfern Street	10	1	11
Totals	106	9	115

Source: ACECQA Registers, March 2019, manually cross referenced to check if in City of Sydney local area

CBD and Harbour had the largest number of long day care services catering predominantly to the worker population in the area, followed by Green Square and City South, which is an area of high population and housing growth. Macleay Street and Woolloomooloo and Chinatown and CBD South had the least number of LDC services.

Number of approved child care places

Long day care comprise the majority of approved places (94.05 per cent) provided to children aged from birth to five years in the city area. The following table shows the number of approved LDC and preschool places in each Village area.

Table 66. Number of approved long day care and preschool places by Village

	LDC	Preschool	Estimated total number of places
CBD & Harbour	1,632		1,632
Chinatown & CBD South	287		287
Crown & Baptist Streets	419	69	488
Glebe Point Road	507	178	685
Green Square & City South	1,753		1,753
Harris Street	583		583
King Street	418	39	457
Macleay Street & Woolloomooloo	142	70	212
Oxford Street	288		288
Redfern Street	556	60	616
Totals	6,585	416	7,001

* Some services could not be contacted or were not able to provide this information

Source: individual contact with each service

Most of the approved places are in:

- Green Square and City South: 1,753 LDC places
- CBD and Harbour: 1,632 LDC places.

The least number of approved places are provided in Macleay Street and Woolloomooloo (212 places).

Age break up of approved child places

Across the City of Sydney there are 7,001 approved places for children aged for birth to 5 years; this includes LDC and preschool.

Places for children aged from birth to less than two years and two to three years comprised the lowest proportions of approved places provided, averaging 24 per cent of approved places across the local area. Families At Work's anecdotal reporting indicates that places for children aged from birth to less than two years comprise 20 per cent to 25 per cent of the market place. The following table shows the number of approved places for children aged from birth to five years not at school by age and Village area.

Table 67. Number of approved places for children aged from birth to 5 years by Village

	0-2yrs	2-3yrs	3 5yrs	Total	0-2 yrs	2-3yrs	3 5yrs	Total
CBD & Harbour	457	435	519	1,632	28%	27%	32%	87%
Chinatown & CBD South	85	75	112	287	30%	26%	39%	95%
Crown & Baptist Streets	132	127	233	488	27%	26%	48%	101%
Glebe Point Road	118	125	354	685	17%	18%	52%	87%
Green Square & City South	360	419	604	1,753	21%	24%	34%	79%
Harris Street	145	171	247	583	25%	29%	42%	96%
King Street	110	107	222	457	24%	23%	49%	96%
Macleay Street & Woolloomooloo	52	31	131	212	25%	15%	62%	102%
Oxford Street	73	69	120	288	25%	24%	42%	91%
Redfern Street	136	119	298	616	24%	19%	48%	91%
Totals	1,668	1,678	2,840	7,001	24%	24%	41%	89%

*The total number of child places is an accurate representation of number of approved places. Totals by age group may be an under representation as some services could not be contacted, were not able to provide this information or were not operating at full capacity

Source: individual contact with each service

Green Square and City South, and CBD and Harbour had the greatest number of approved child places, 1,753 and 1,632 respectively. Macleay Street and Woolloomooloo, and Chinatown and CBD South had the least number of approved places, 212 and 287.

Chinatown and CBD South, and CBD and Harbour had the largest proportion of approved places for children aged from birth to less than two years; 30 per cent and 28 per cent respectively, followed by Crown and Baptist Streets at 27 per cent, and Harris Street, Macleay Street and Woolloomooloo, and Oxford Street all at 25 per cent. Glebe Point Road had the lowest proportion of approved places for children aged from birth to less than two years at 15 per cent. Macleay Street and Woolloomooloo has the greatest proportion of approved places for children aged three to five years (62 per cent), followed by Glebe Point Road (52 per cent) and King Street (49 per cent) – all areas with proportionally more preschools catering exclusively for children aged three to five or four to five years of age.

Outside of School Hours Care services

Number of services

There are 31 approved OSHC providers in the city area. The following table shows the number of before, after and vacation care services these providers operate.

Table 68. Number of OSHC services by Village area

	Before	After	Vacation	Total approved OSHC services
CBD & Harbour	2	3	3	3
Chinatown & CBD South	0	0	0	0
Crown & Baptist Streets	1	2	3	4
Glebe Point Road	2	3	1	5
Green Square & City South	2	2	2	2
Harris Street	0	2	2	2
King Street	4	4	4	5
Macleay Street & Woolloomooloo	1	2	2	2
Oxford Street	3	3	1	4
Redfern Street	0	3	2	4
Totals	15	24	20	31

Source: ACECQA Registers, March 2019, cross referenced to determine if in City of Sydney local area

More providers offered after school care than other OSHC services. King Street had the largest number of OSHC services. Chinatown and CBD South had no OSHC services. There are no schools located in this Village and children who live in this Village are likely to attend Ultimo Public School or Fort Street Public School. Both the schools are located in other City Villages.

Number of approved child places

OSHC providers have a maximum number of child places approved for operation. Generally, there is greater demand for after school care than before school care, so providers will not operate at full capacity for before school care, voluntarily capping the number of before school care places based on demand. For example, an OSHC provider may be approved for a total of 90 places and opt to provide only 30 of these 90 places for before school care due to demand.

The following table shows the estimated number of OSHC places by Village area. The total column shows the total number of approved OSHC places in each Village area as some services often voluntarily cap their operational places for before school care due to lower demand from families.

Table 69. Number of OSHC places by Village area

	Before	After	Vacation	Ttotal approved places
CBD & Harbour	115	145	145	145
Chinatown & CBD South	–	–	–	0
Crown & Baptist Streets	120	300	240	360
Glebe Point Road	165	320	170	550
Green Square & City South	105	155	140	155
Harris Street	–	75	75	90
King Street	337	450	366	520
Macleay Street & Woolloomooloo	4	52	53	75
Oxford Street	232	265	40	390
Redfern Street	–	190	145	190
Totals	1,078	1,952	1,374	2,475

* Some services could not be contacted or were not able to provide this information

Source: individual contact with each service

Most of the places are in:

- Glebe Point Road: 550 approved OSHC places
- King Street: 520 approved OSHC places

Chinatown and CBD South had no approved OSHC places as there are no schools located in the Village.

It is important to note that some of the before, after and vacation care services in the local area are approved for more places than currently required to meet existing families' demands. This allows these services to have capacity to grow in the future.

Cost of ECEC and OSHC

ECEC services

Daily fees for ECEC varied across the City area from \$88 for children aged three to five years in Redfern Street (where parents provided everything for their child's attendance including all food and drink) to \$175 in Oxford Street for children aged from birth to less than two years. CBD and Harbour had the most expensive fees and Redfern Street the least expensive fees. The average daily fee for ECEC in the City ranges from \$143.33 for children aged from birth to less than two years 0-2, \$139.15 for children aged two to three years and for children three to five years \$131.04.

The following table shows the average fees for ECEC services in each Village by age group.

Table 70. Average daily fees by age group and Village

	LDC – average daily cost			Preschool – average daily cost	
	0-2 yrs	2-3 yrs	3 5yrs	3yo	4yo
CBD & Harbour	\$162.98	\$161.36	\$156.82	–	–
Chinatown & CBD South	\$150.33	\$147.33	\$144.33	–	–
Crown & Baptist Streets	\$151.19	\$144.06	\$136.07	–	\$39.00
Glebe Point Road	\$140.43	\$134.00	\$124.86	\$47.50	\$45.00
Green Square & City South	\$131.83	\$123.47	\$116.31	–	–
Harris Street	\$133.94	\$130.11	\$123.17	–	–
King Street	\$135.86	\$135.14	\$125.93		
Macleay Street & Woolloomooloo	\$156.85	\$156.75	\$148.50	\$82.00	\$52.00
Oxford Street	\$151.00	\$146.00	\$127.67	–	–
Redfern Street	\$118.88	\$113.30	\$106.75	–	\$40.00
Average daily fee across the City	\$143.33	\$139.15	\$131.04	\$64.75	\$44.00

* Some services could not be contacted or were not able to provide this information

Source: individual contact with each service

OSHC services

OSHC sessional⁴⁷ fees varied across the local area. The highest sessional fees were:

- before school care – \$22.31 in CBD and Harbour
- after school care – \$27.04 in CBD and Harbour and
- vacation care – \$71 in Macleay Street and Woolloomooloo.

And the lowest sessional fees were:

- before school care – \$7.00 in Macleay Street and Woolloomooloo
- after school care – \$21 in Crown and Baptist Streets and
- vacation care – \$50.00 in Redfern Street.

The following table shows the average fees for OSHC by service type in each Village.

47 A session is considered to the minimum period that a service charges a fee for.

Table 71. Average sessional fees by OSHC type and Village

	Average daily cost		
	Before	After	Vacation
CBD & Harbour	\$22.31	\$27.04	\$58.75
Chinatown & CBD South	–	–	–
Crown & Baptist Streets	\$15.00	\$21.00	\$60.00
Glebe Point Road	\$15.67	\$22.75	\$57.50
Green Square & City South	\$14.70	\$22.47	\$53.41
Harris Street	–	\$23.00	\$57.00
King Street	\$16.25	\$26.00	\$56.25
Macleay Street & Woolloomooloo	\$ 7.00	\$23.75	\$71.00
Oxford Street	\$12.50	\$25.17	\$55.00
Redfern Street	–	\$25.50	\$50.00
Average daily fee across City	\$14.78	\$24.08	\$57.66

* Some services could not be contacted or were not able to provide this information

Source: individual contact with each service

Quality rating

One hundred and thirty nine of the 146 children's services located in the City of Sydney local area had been rated under the NQS. Seven relatively new services were rated as 'Provisional – not yet assessed' pending their first assessment and rating visit.

Children's services in the City of Sydney generally rated higher than the NSW average. Just over half of the LDCs located in the City were rated as Exceeding NQS compared with just over a quarter in all NSW. Twenty-two per cent of OSHC services rated as Exceeding NQS compared with 16 per cent in all NSW, and preschools in the City fared better than their counterparts in all NSW.

The following table shows the ratings for children's services in the City of Sydney and those of all services located in NSW by service type. Overall, children's services in the City provide high quality ECEC and OSHC when compared with the rest of NSW.

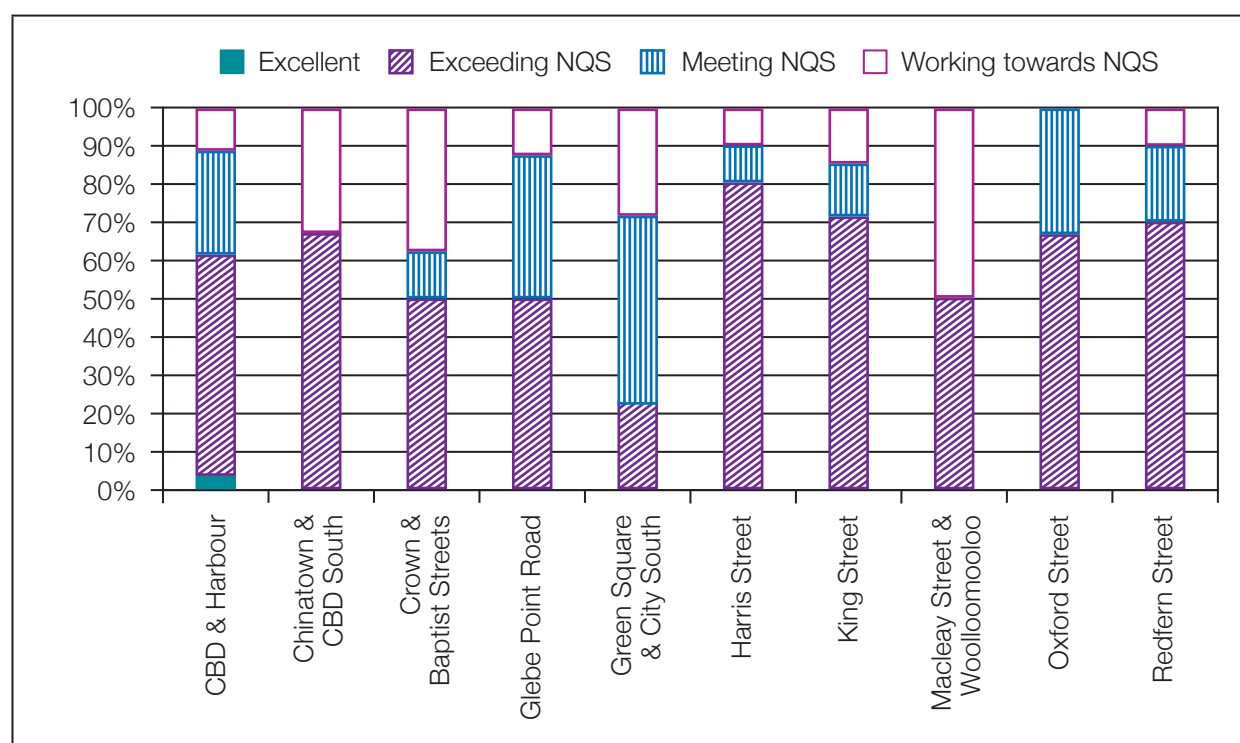
Table 72. Quality rating of children's services located in the City of Sydney

	Excellent		Exceeding NQS		Meeting NQS		Working towards NQS	
	CoS	NSW	CoS	NSW	CoS	NSW	CoS	NSW
Long Day Care	1%	0%	54%	28%	27%	47%	18%	24%
Out of School Hours Care	0%	0%	21%	16%	57%	50%	21%	34%
Preschool	0%	1%	56%	49%	44%	41%	0%	9%

Source: ACECQA Registers March 2019; ACECQA NQS Snapshots as of 31 March 2019, NQS data, acecqa.gov.au/nqf/snapshots, accessed 23 May 2019

The following tables show the quality rating by service type and Village area. Village areas where LDC services were well-established and had a longer history of operation and continuous quality improvement, such as the CBD and Harbour or Redfern Street generally had more services rating Exceeding NQS compared with newer areas such as Green Square where new services had more recently engaged with the NQS and were rated as Working Towards or Meeting NQS.

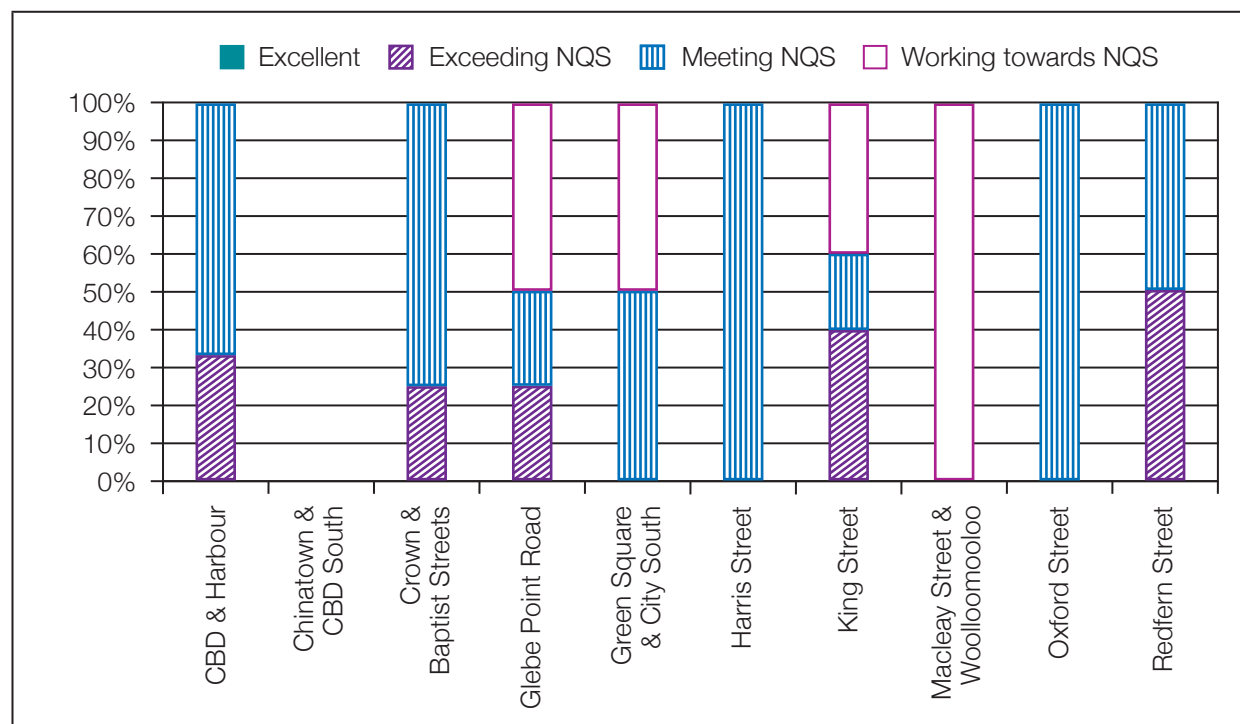
Table 73. Long day care quality rating by Village area



Source: ACECQA Registers, March 2019

Many more OSHC services were rated as Meeting NQS. OSHC services generally do not rate as highly as other centre-based ECEC services. Anecdotally this is in part attributed to the challenges of operations often in shared space and the more transient nature of the workforce due to split and/or very short shifts. The following table shows the quality rating of OSHC service by village area.

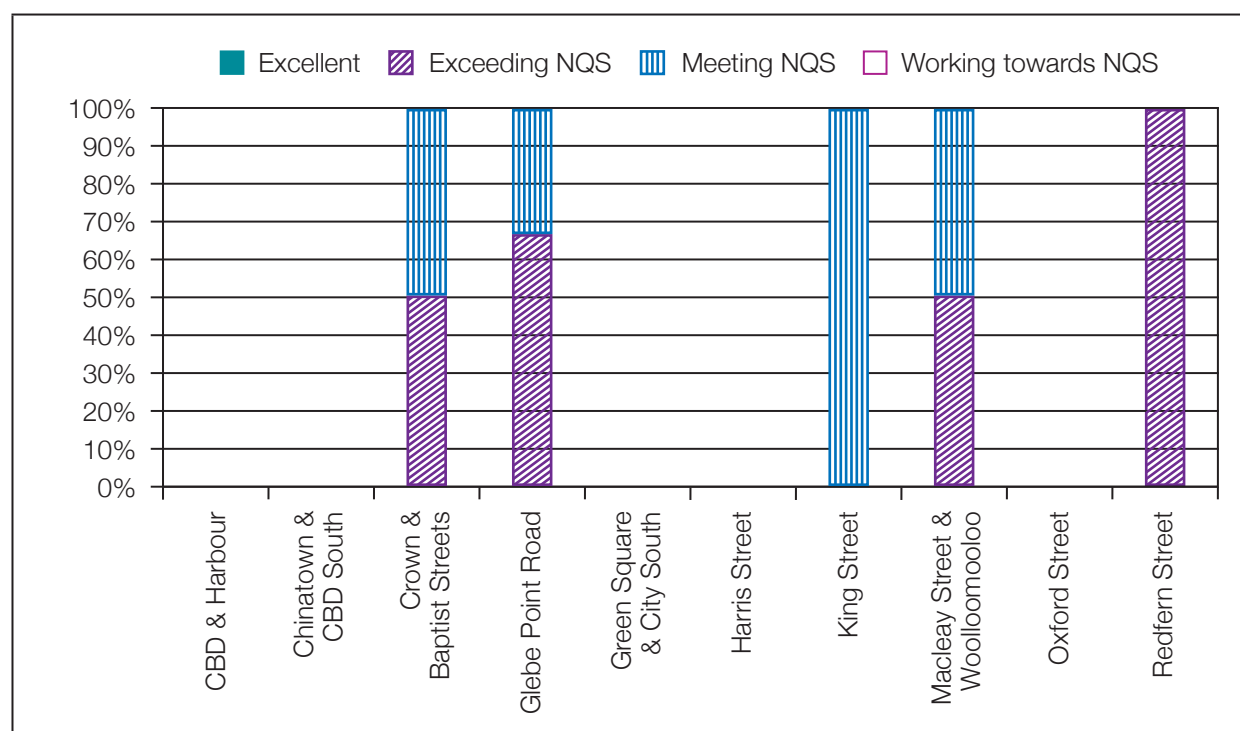
Table 74. OSHC quality rating by Village area



Source: ACECQA Registers, March 2019

Some preschools in the local area were rated as Meeting NQS. Historically with an emphasis on education rather than education and care, preschools have achieved higher ratings than other service types. The preschools that received the rating of Meeting NQS include a standalone service with limited infrastructure support, services where preschool or education and care services are not the primary business of the organisation, or where the educational program is part of a much wider purpose of supporting families who may be experiencing vulnerability or disadvantage.

Table 75. Preschool quality rating by Village area



Source: ACECQA Registers, March 2019

Waiting lists and vacancies

ECEC services

There is a perception from some families that there are not enough child care places, particularly for children under two years or age. Around two thirds of the services contacted had waiting lists with wait times varying from a few weeks to more than 12 months (only a very few services), all other ECEC services that responded to this question had vacancies, mostly across all age groups and days.

Very few ECEC services were operating at full capacity. Those services that responded to this question and were at full capacity were located in:

- CBD and Harbour – one service, rated as Meeting NQS
- Glebe Point Road – one service, rated as Exceeding NQS
- King Street – one service, rated as Exceeding NQS
- Macleay Street and Woolloomooloo – one service, rated as Exceeding NQS
- Oxford Street – one service, rated as Exceeding NQS and
- Redfern Street – one service, rated as Exceeding NQS.

Services with high quality ratings were less likely to have vacancies than those services with lower quality ratings.

Services that reported waiting times for places were due to families on waiting lists for places in the future for unborn children, or existing vacancies did not match parent demand, for example preferred days and hours.

OSHC services

Across the local area, OSHC services had vacancies for before school care and in some Villages for vacation care. The number of vacancies for after school care varied across all Villages. Village areas where after school care seemed to be in greatest demand were:

- Green Square where services had no vacancies and waiting lists for after school care
- Harris Street where there were limited vacancies for after school care and waiting lists
- King Street where some of the services had waiting lists for after school care and were operating at full capacity and
- Oxford Street where one of the four services was operating at full capacity and had a six-month waiting list for after school care.

Summary

ECEC services

In April 2019 there were 6,495 approved places for children aged from birth to five years in the City. The largest numbers of approved places for children aged from birth to five year are located in the Villages of:

- Green Square with 1,753 places, with 21 per cent of these for children aged from birth to less than two years
- CBD & Harbour with 1,632 places, with 28 per cent of these for children aged from birth to less than two years.

There were vacancies in many LDC centres, with some CBD centres having only 30 per cent occupancy. The long day centres that were full were most often well-established, with strong community connections and providing high quality education and care. Around two thirds of LDC centres contacted had waiting lists with waiting times varying from a few weeks to 12 months (very few services).

OSHC services

In April 2019 there were 31 OSHC services providing a total of 2,475 places in the City of Sydney, including before school care, after school care and vacation care. Some services cater to more than one primary school. Market research undertaken through this study showed that seven after school care services, catering for 10 of the public primary schools located in the local area were full, with waiting lists. The greatest demand for after school care was in in the villages of Harris, King and Oxford Streets.

The largest numbers of approved OSHC places were located in the Villages of:

- Glebe Point Road with 550 places including 165 before school care, 320 after school care, and 170 vacation care places
- King Street with 520 places including 337 before school care, 450 after school care, and 366 vacation care places.

The demand is less for before school care and after school care.

Comments reported in the parent survey indicated that the lack of after school care was a concern for many families, with some families having to stretch the limits of their flexible work practices, and others not understanding why schools do not offer OSHC places that match demand.

Recommendation

The City of Sydney continues to advocate for, and monitor, the supply of on-site OSHC, including the School Infrastructure NSW program of works to redevelop and upgrade local schools, to identify the need for additional off-site care, such as that provided by the City of Sydney's services.

8. Parent survey

This section of the report documents the results of the online parent survey *Understanding your child care needs* and outlines trends and issues that emerged from the survey responses.

There were 570 respondents to the survey. The data relating to each section below refers only to respondents of that particular question in the survey.

Unless otherwise stated, all data is sourced from the parent user survey *Understanding your child care needs*.

Survey design

The survey was designed by Families At Work, in consultation with the City of Sydney, as an online survey, accessible from the City of Sydney's website. The survey was emailed to all City of Sydney children's services and providers in the City of Sydney. It was promoted by Facebook advertising through the City of Sydney's account, and distributed to more than 4,000 subscribers of the *SydneyYourSay* community engagement newsletter. Hard copies of the survey were distributed to Children's Programs in Surry Hills, Redfern and Woolloomooloo.

About the respondents

Family status

Nearly all respondents (93 per cent, 530) had children and five per cent (30) were pregnant or planning to have children in next three years.

Three quarters (73 per cent, 417) lived in the City of Sydney, across all Village areas.

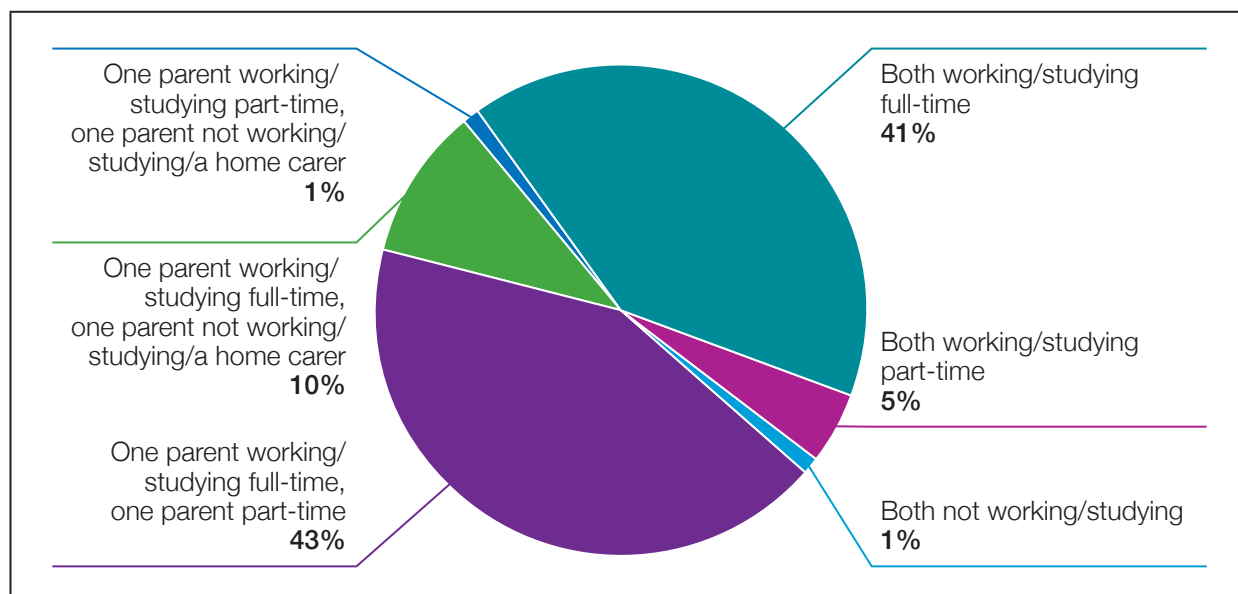
Family type

The majority of respondents were married/de facto couples caring for their own children (90 per cent, 477), 9 per cent (47) were single parents and seven respondents were another family member/care giver/guardian/other caring for children.

Work status

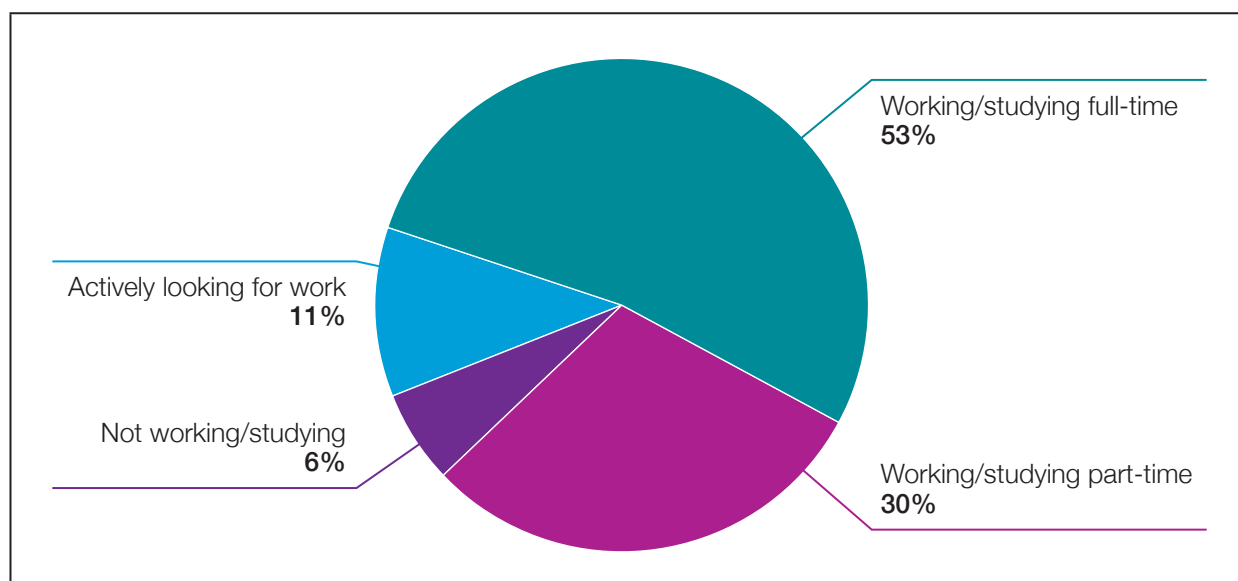
Around 40 per cent of married/de facto couples both worked/studied full-time (41 per cent) or had one parent working/studying full time and the other parent part time (43 per cent). The following table shows the work status of married/de facto couple families.

Table 76. Married/de facto couple families work status



Just over half (53 per cent) of the single parent respondents worked/studied full-time and nearly one third (30 per cent) were working/studying part-time. The following table shows the work status of single parent respondents.

Table 77. Single parent work status



Four of the seven other carers of children worked full-time.

Cultural background

The majority (88 per cent, 459) of the respondents spoke English as their main language at home, followed by Mandarin (2 per cent, 11). It is likely that people who do not speak English as their first language may be under represented in survey responses.

Eleven respondents (2 per cent) identified as Aboriginal or Torres Strait Islander.

Age of respondents

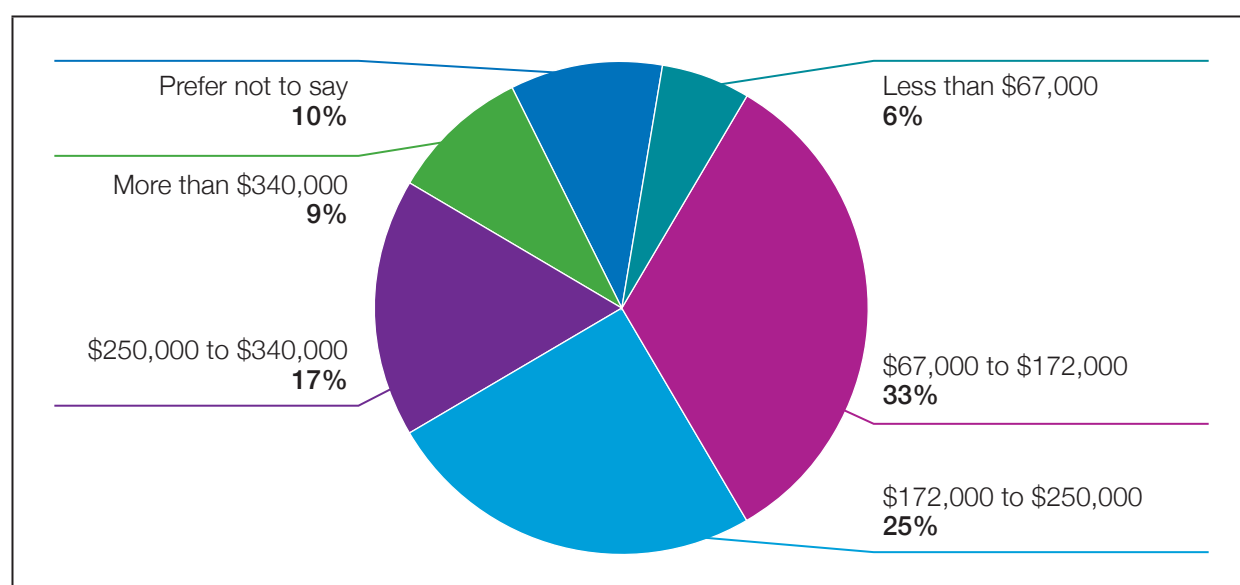
Sixty-nine per cent (362) of respondents were aged 31 to 40 years, followed by one quarter aged 41 to 50 years; years mostly associated with child bearing and rearing.

Family income

One third (170) of respondents had combined family incomes ranging from \$67,000-\$172,000 – families in this income band who apply for CCS will be eligible for a subsidy ranging in from 85 per cent to 50 per cent. One quarter (133) of respondents had combined family incomes ranging from \$172,000-\$250,000 – families in this income band who apply to CCS will be eligible for a 50 per cent subsidy. Six per cent of families were in the lowest income band and would be eligible for maximum CCS, if they also meet the work activity test.

The following table shows the income range of respondents.

Table 78. Income range of respondents



Children

Seventy-three per cent (381) of respondents to this question had children aged from birth to 11 years, or who are 12 years old and still at primary school. These respondents had a total of 645 children; 62 per cent (402) of these children were aged from birth to 4 years and 38 per cent (243) aged from 5 to 11 years.

- 99 per cent (379) respondents with children had one child
- 48 per cent (184) of respondents with children had two children
- 11 per cent (43) of respondents with children had three children
- two per cent (8) of respondents with children had four children
- 0.5 per cent (2) of respondents with children had five child

Eleven (3 per cent) of respondents had children with a disability.

Use of child care or outside school hours care

Eighty-six per cent (325) of respondents to this question used ECEC or OSHC and 14 per cent (54) did not use ECEC or OSHC.

Reasons for not using child care or outside school hours care

Of the 45 respondents that did not use ECEC and provided a reason:

- 14 preferred to care for their child themselves
- 11 indicated other reasons mostly related to still being on parental/maternity leave
- nine could not afford the care that was available
- six used family or friends to look after their children
- four could not get care at their preferred location and
- one did not like the idea of child care.

Of the 20 respondents who did not use OSHC and provided a reason:

- seven preferred to care for their child themselves
- five indicated other reasons including one respondent with an ill child and another who is concerned about the lack of qualifications of educators in OSHC
- four used family or friends to look after their children
- two could not get the days or hours they wanted and
- two could not afford the care that was available.

Type of care used

The 657 children aged from birth to 12 years of respondents attended 969 sessions of diverse types of child care; just under 1.5 different child care arrangements per child per week. One quarter (28 per cent, 268) of these child sessions were for LDC, and just under one fifth were sessions where the child was cared for by family members/friends (19 per cent, 183) followed by after-school care (14 per cent, 134), vacation care (12 per cent, 119), and a nanny (7 per cent, 71). The following table shows the type of care used by respondents for their children.

Table 79. Types of child care used for each child

	Number of children	Per cent
Long day care	268	28%
Family members/friends	183	19%
After school care	134	14%
Vacation care	119	12%
Nanny	71	7%
Preschool/kindergarten	83	9%
Before school care	54	6%
Occasional child care	40	4%
Family day care	10	1%
Other	7	1%
	969	100%

Reasons for using care

Respondents with children were asked to rate from not important to very important different considerations for the care they were using now.

Respondents with children aged from birth to five years considered the following considerations as important or very important:

- the quality rating of the care required (88 per cent)
- the educational program provided (87 per cent)
- close to home (82 per cent)
- cost of care (70 per cent)

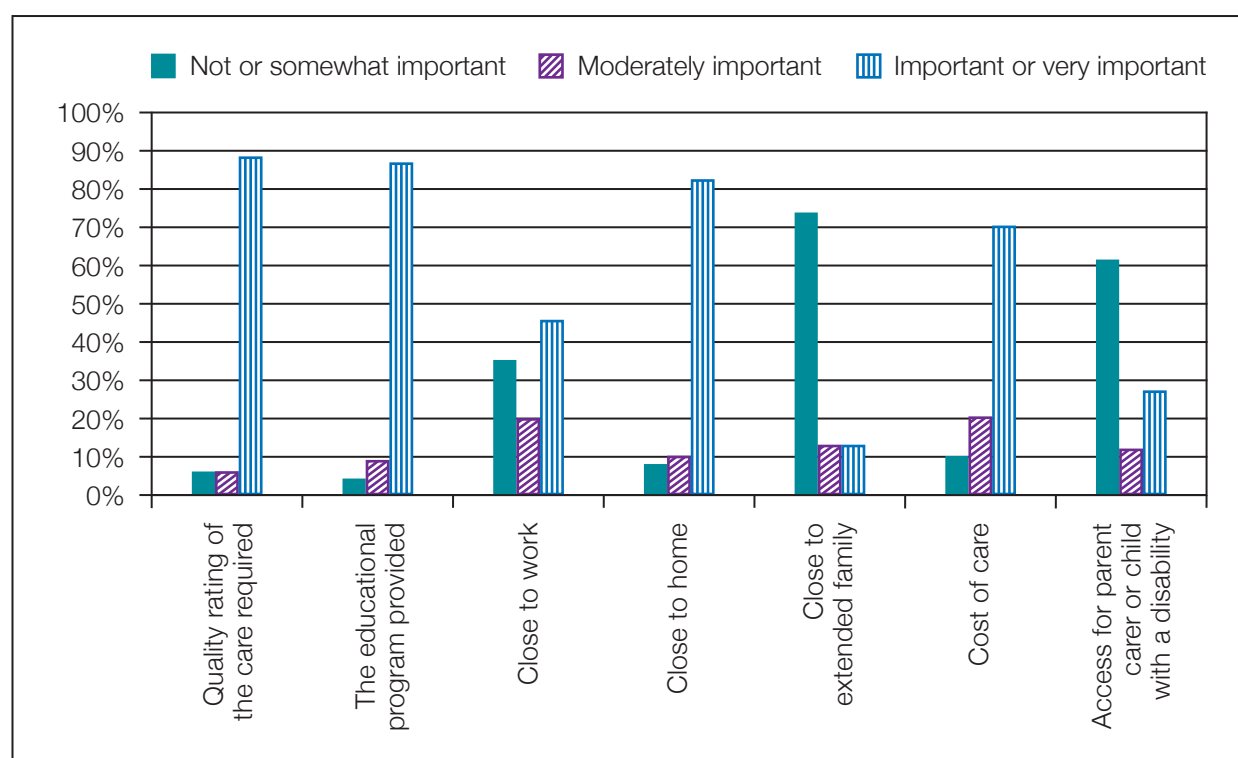
Considerations of least importance (not important or somewhat important) were:

- close to extended family (74 per cent)
- access for parent carer or child with a disability (61 per cent)
- close to work (35 per cent).

It should be noted that families with extended family nearby, or with a child with a disability, might consider these highly important – which may not be reflected in the survey responses.

The following table shows these results.

Table 80. Children aged from birth to 5 years considerations for current child care use



Respondents with children aged from five to 12 years considered the following as important or very important. These are the same reasons as for children aged from birth to five years, however proximity to home was more important than quality:

- close to home (86 per cent). Many children would be attending schools with designated catchment areas based on respondents' residence; it is most likely that any OSHC service would be located close to home
- the quality rating of the care required (82 per cent) and
- the educational program provided (71 per cent).

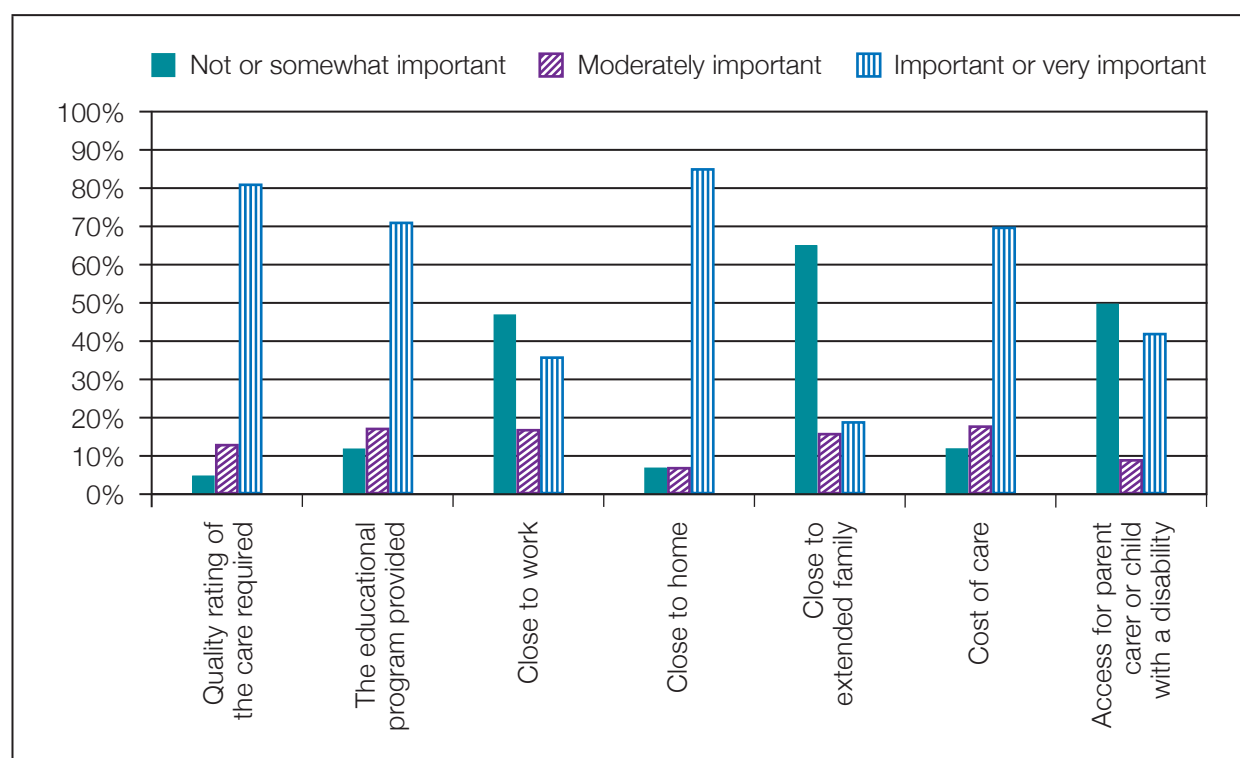
Considerations of least importance (not important or somewhat important) for children aged from 5 to 12 years were:

- close to extended family (65 per cent)
- access parent care or child with a disability (49 per cent) and
- close to work (16 per cent).

It should be noted that families with extended family nearby, or with a child with a disability, might consider these highly important – which may not be reflected in the survey responses.

The following table shows these results.

Table 81. Children aged from 5 to 12 years considerations for current OSHC use



Some survey respondents made specific comments about quality noting concerns about staff qualifications, range of activities provided to children and the impact turnover can have on quality of care.

“Better pre-school readiness program”

“I am highly disappointed at the quality of school readiness programs at daycare centres. Early childhood education should be free 3 days a week from aged 3yrs. It has been extremely difficult to find long daycare with university educated teachers. As an educator myself I am highly dissatisfied with the quality of early childhood education in NSW.”

“My school aftercare is so boring and nothing to do. Local councils should group a few local schools and do multi sports. Keep kids active “

“Quality of care is important. We travel to the north shore for care (and school) as there is a lack of quality care in the city.”

“I have seen so many child carers who lack basic empathy and clearly dislike their job. They are just a business and a badly ran one at that! Turnover is high in most centers and I feel the people hired can barely read and write themselves (you see this is the daily class updates they send out) yet we leave them to teach.”

“Staff turnover is high in the centres my children have attended. Maybe provide a bonus for childcare staff working in city of Sydney to compensate for high transport and living costs. Many travel long distances to work here.”

Travel to care

Nearly half (46 per cent, 138) of parent respondents to this question walked to their child care facility, and of those that walked to their child care facility the majority (120 out of 138) lived in the City of Sydney local area.

One third (99) used a car as the driver; and of these 58 lived in the City and 41 lived outside of the City area.

There seems to be a preference for City residents for child care located within walking distance of their homes.

Reasons using child care or outside of school hours care

Respondents were asked to rate from not important to very important the reasons they used child care or OSHC for their children aged from birth to five years and five to 12 years.

Respondents with children aged from birth to 5 years considered the following reasons as important or very important for their use of child care or OSHC:

- work related (97 per cent)
- socialisation for the child (86 per cent) and
- activity for children (85 per cent).

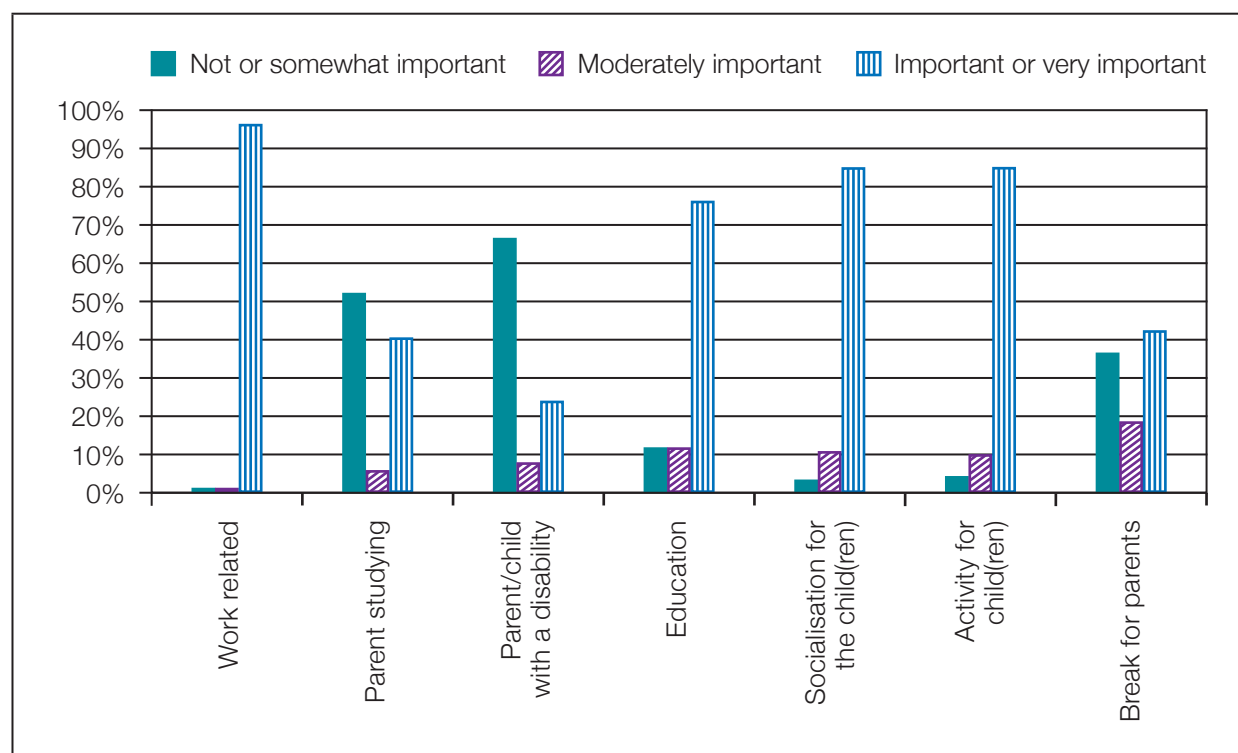
Reasons that were least important (not important or somewhat important) for respondents' use of child care were:

- parent/child with a disability (67 per cent)
- parent studying (53 per cent) and
- break for the parents (38 per cent).

As noted above; families with a parent or child with a disability might consider these highly important – which may not be reflected in the survey responses.

The following table shows these results.

Table 82. Children aged from birth to 5 years reasons for use of child care



Respondents with children aged from five to 12 years considered the following reasons as important or very important for their use of child care or OSHC:

- work related (95 per cent)
- activity for children (78 per cent) and
- socialisation for the child (74 per cent).

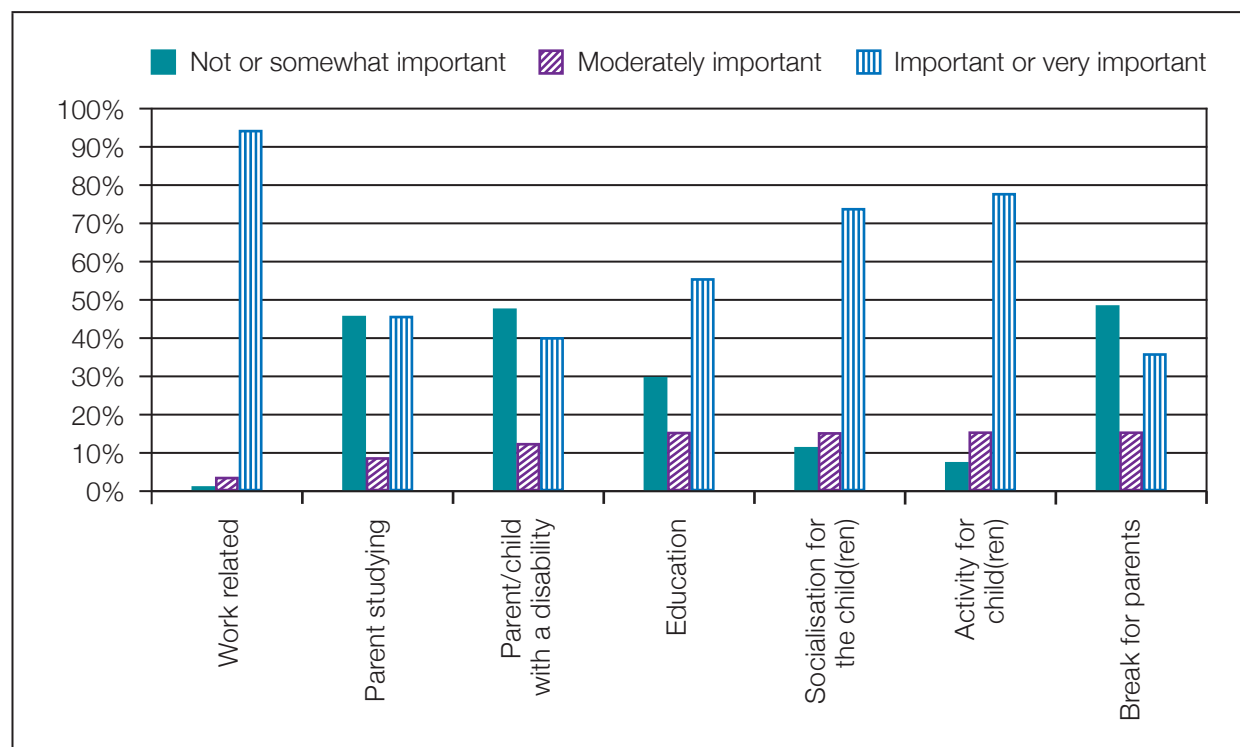
These are the same areas that were rated at the highest by respondents with children aged from birth to five years, with socialisation rating second and activity third for the younger children.

The reasons that were least important (not important or somewhat important) for respondents with the older children were the same as those with younger children and these were:

- break for the parents (49 per cent)
- parent/child with a disability (47 per cent) and
- parent studying (46 per cent).

The following table shows these results.

Table 83. Children aged from 5 to 12 years reasons for use of outside school hours care



Receipt of Child Care Subsidy

Seventy-nine per cent (243) of parent respondents receive CCS and 21 per cent do not, however one fifth of respondents do not receive CCS, although only 10 per cent of all respondents were above the eligibility threshold for CCS.

Preferred child care

Eighty-two per cent (253) of parent respondents are using their preferred child care or OSHC. Many respondents commented on proximity to their home and/or work place, the quality and reputation of the services they were using, and for those using OSHC the co-location of the OSHC and the school the children were attending, the appropriateness of the service hours to suit work hours and the ability to access CCS.

“We wanted to find somewhere close to home that shared our values”

“The hours are great and they’re close to my work in the city. Handy for pick up/drop off especially if the trains are running late”

“Level of care and affection shown to children at centre is very high and the facilities are wonderful. My daughter is very happy there which makes us happy”

“It’s local (walking distance from home), my son’s peer group also go there (kids he knows from school and from the surrounding community), the facilities are excellent/inviting and the team are fantastic. Can’t believe how lucky we are.”

“Fantastic team of committed staff with a diverse range of backgrounds and interest areas”

“CCS available, long opening hours”

Almost one fifth (18 per cent, 56) of parent respondents were not using their preferred child care or OSHC. Reasons why respondents were not using their preferred child care or OSHC included prohibitive cost of care, lack of availability close to home, preference of attendance at a “proper preschool” as respondents did not believe this could be delivered in a LDC setting, accommodating respondents who worked outside regular business hours such as shift workers, concerns about quality, and wanting/using a nanny and finding this cost prohibitive.

“Full time Childcare is too expensive for 2 kids with 2 full time working parents who don’t get the child care rebate or subsidy. We had to find an au pair and have the eldest in daycare 1 day pw to give him other stimulation and socialisation.”

“Rating is below average but unable to find a long day care which opens @6:30am since I live very far from work.”

“Long daycare hours don’t cover my nursing shifts (7am-730pm or 7pm-730am). I have to use a nanny AND long daycare on the same day. It costs more than I am earning. If I use only a nanny, it is cheaper, however my children miss out on socialization and the education program of a long day centre or preschool.”

“for our 3 year old we would prefer a proper pre school program / school. Although the limited hours would cause us major problems but our child’s education (especially early childhood) comes 1st.”

Another 22 parent respondents specifically commented on ECEC service hours not matching work hours, particularly with more employees accessing workplace flexibility and working outside of regular office hours.

“Council childcare should have longer hours.”

“As a single mother who works full time and with little to no support from the other parent, it is a struggle to manage drop offs and pick ups and working and I feel like I am penalised in a fashion for trying to juggle a career.”

“There are very few options in my area with long hours that accommodate work. Most open at 7 and close at 6. Would be great to have more places open at 6:30 and close at 6:30.”

“All the child care hours seem to be based around white collar workers 9 to 5. A lot of blue collar workers start early or late and there is no care for these more unusual hours.”

“Overnight care is badly needed.”

Preferred child care location

Parent respondents were asked whether they used child care or OSHC within the City of Sydney local area or outside it and whether this was their preference.

Two hundred and sixteen respondents with children aged from birth to five years used child care within the City of Sydney; of these 187 said this was their preferred location.

Forty-six respondents with children aged from birth to five years used child care outside the City of Sydney; of these 36 said this was their preferred location.

Eighty-two respondents with children aged from five to 12 years used OSHC within the City of Sydney; of these 74 said this was their preferred location.

Forty respondents with children aged from five to 12 years used OSHC outside the City of Sydney; 31 said this is their preferred location.

What influences the use of child care or OSHC?

Parent respondents were asked to consider what influenced their use of child care or OSHC services for children aged from birth to five years and children aged from five to 12 years.

For children aged from birth to five years the greatest influences for parent respondents were:

- the care was good quality – 30 per cent
- close to home – 18 per cent
- close to work – 16 per cent and
- the cost of care was affordable – 15 per cent.

Parent respondents could select several influences. Some of the influences may be more important than others; for example 68 per cent of respondents to this question listed the care was good quality as an influence.

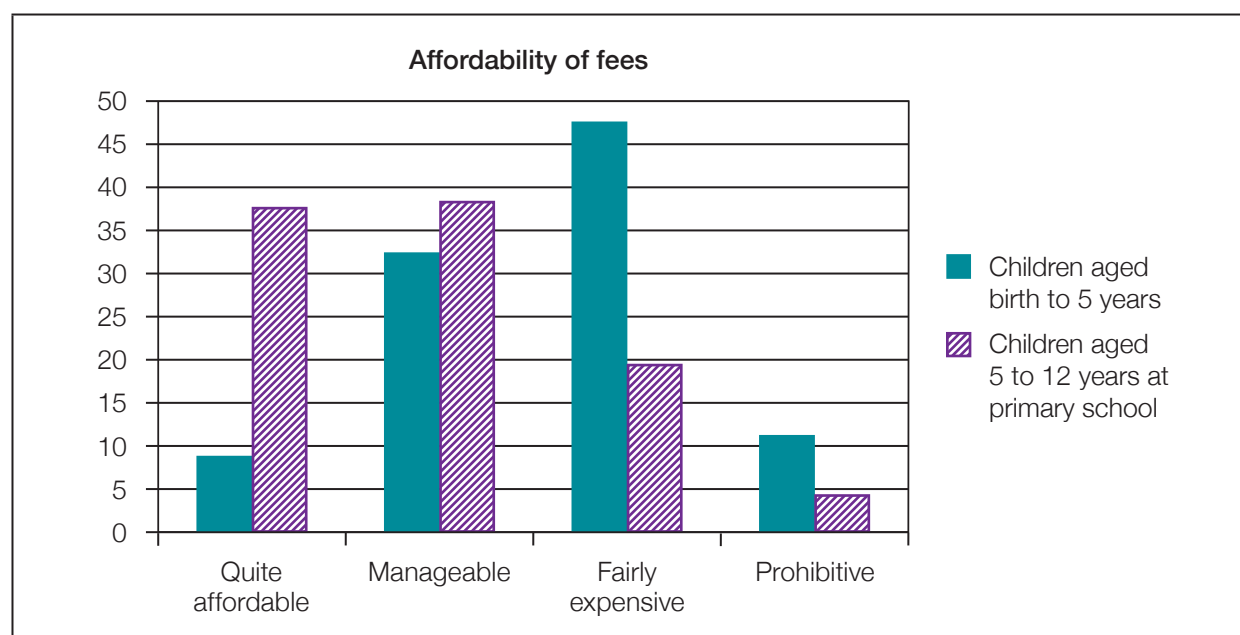
For children aged from five to 12 years the greatest influences for parent respondents were:

- close to home – 30 per cent
- the care was good quality – 22 per cent and
- the cost of care was affordable – 20 per cent.

Cost of care

Respondents with children were asked to describe their perceptions of their daily out-of-pocket expenses for their youngest child attending child care or OSHC. Respondents with children aged from birth to five years said that their daily fees were fairly expensive (48 per cent), manageable (33 per cent), prohibitive (11 per cent) or quite affordable nine per cent). Respondents with children aged from five to 12 years said their fees are quite affordable (38 per cent) or manageable (38 per cent), fairly expensive (23 per cent) or prohibitive (four per cent). The following table shows perceptions of affordability of fees for each age group.

Table 84. Out-of-pocket expenses per day for your youngest child



More than 50 respondents specifically commented on the pressures that high costs of care placed on the family.

“The out of pocket costs put stress on our family.”

“The cost of deposits is stopping me from enrolling at TAFE, as I cannot afford the cost of daycare & the deposits.”

“I don’t know how families with more than one child afford childcare. What’s the point in working if it all goes to childcare anyway.”

“As a single parent, I found the costs of daycare absolutely horrific...I was paying the equivalent of rent every week.”

“It is ridiculous how expensive childcare is. It is completely unfair on women who end up being stuck on part time jobs because of prohibitive childcare costs. This only contributes to more gender inequality in the workplace and in society in general.”

Child care should be an enabler of workforce participation and cost of child care should not be a barrier to this participation.

Days of attendance

Parent respondents’ children attended child care from one day a week to a few children (5) attending some type of care six or seven days a week. The greatest number of respondents’ children attended three days a week (128) followed by five days a week (112). This is slightly different to ABS data that shows that most children attend two to three days a week in long day care or before and/or after school care⁴⁸.

The following table shows the number of days children attend care each week.

Table 85. Days a week children are in care

1 day	2 days	3 days	4 days	5 days	6 or 7 days
23	102	128	86	112	3

Four hundred and fifty-four children attended 801 days of care per week.

Respondents of 320 children said they used the days of care they did because this is how many days they needed; respondents of 114 children said they used the days they did because it was too expensive to have the child in care for additional days; respondents of 89 children said they prefer their child to attend care on a part-time basis; and respondents of 27 children said they would like more days, however these are the only days available.

48 ABS (2018), *Childhood Education and Care, Australia, June 2017*, Cat. No. 4402DO006_201406, Table 6, Usual weekly hours of care.

"I am considering more days so that I can work more but am concerned about the impact to the benefit."

"These are the days offered for his age group."

"The pre-school only covers 3 days per week for 4 to 5 year olds. Long daycare in my area has a two days per week minimum for [enrolment]. The pre-school fees are not included in the childcare rebate system and I'm unable to afford an extra two days of long daycare. This leaves my mother who I also care for (due to age and disability) assisting me with child care two days per week ... which is not ideal."

Respondents on waiting lists for a child care or outside school hours care

Of the 300 respondents to this question, 67 (22.3%) respondents were on waiting lists for child care or OSHC, the majority of these respondents (85%) were on waiting lists for LDC.

Respondents were on:

- one waiting list: 17 respondents
- two to three waiting lists: 24 respondents
- four to five waiting lists: 13 respondents and
- six + waiting lists: 6 respondents.

For the waiting list that respondents were with on, respondents paid:

- no fees: 96 waiting lists
- under \$20: eight waiting lists
- \$21 to \$50: 37 waiting lists
- \$51 to \$100: eight waiting lists and
- over \$100: three waiting lists.

Most respondents had been on waiting lists for less than 12 months (70 per cent).

Respondents were asked to comment about their experiences in waiting lists. Concerns related to lack of transparency about how places are allocated, the length of time to get a place particularly for babies, why OSHC places are not part of what is offered when accepting a school place.

"On waiting list, but lack of transparency on status/progress."

"Some centres have a 2 year waiting list, so you need to take [what] you can get really."

"The waiting lists, particularly for babies, are outrageously long ... Different centres have [different] processes for [how] they operate their waiting lists i.e. some require you to call them regularly others call you."

"The Council run childcare in my area (Inner West) has a very long waiting list, as does the Council run OOSH."

"I do not understand why before/after school care places are not guaranteed for those who need them, if a school spot is guaranteed. Why can supply not meet demand and what will happen when the new [suburb] estate opens if there is already a shortage?"

"Waiting time for After School Care at local primary school is more than 12 months which is a real issue for working parents."

"I haven't had a great experience with waiting lists. I don't believe they are always administered 'fairly' by centres and it's sometimes the person who has enquired most recently/ hassled the most that has gotten a daycare place above someone who has been on the waiting list for the longest."

Summary

The majority of respondents (80 per cent) had annual family incomes that aligned with Child Care Subsidy eligibility, with only six per cent of these families in the lowest income band for eligibility.

Many parent respondents (86 per cent) used ECEC or OSHC. Of the 14 per cent of parent respondents who did not use ECEC or OSHC the most frequently cited reason was preference to care for their child themselves.

Parent respondents considered the quality rating of care, the proximity to home and the educational program provided as most important reasons for use of ECEC or OSHC, and of least importance were close to extended family, access parent care or child with a disability and close to work. However, these results could be linked to respondents' access (or lack of) to nearby extended family and/or having a parent/child with a disability.

This survey highlighted that the majority of parents are in preferred child care options. Eighty-two per cent of parent respondents were using their preferred ECEC or OSHC. Preference related to cost of care, preferred location, and days and hours available.

For the majority of parent respondents using ECEC or OSHC within the City of Sydney this was their preferred location. Similarly, for those parent respondents using ECEC or OSHC outside the City, this was their preferred location.

Key influencers for the use of care were the care was good quality, it was close to home and the cost of care was affordable.

Half of the respondents with children aged from birth to five years said that their daily fees were fairly expensive and another third manageable; and 11 per cent said their fees were prohibitive. Around one third of the respondents with children aged from 5 to 12 years said their fees are quite affordable or manageable; only four per cent said their fees were prohibitive. More than 50 respondents specifically commented on the pressures that high costs of care placed on the family.

49 ABS (2017), *Childhood Education and Care, Australia*, Table 6: Children aged 0-12 years who usually attended care: Care usually attended by weekly hours of care.

Parent respondents' children attended child care three days a week (128) or five days a week (112). Around half of the children were attending the days they did as this is how many days were needed. This is a higher ratio than the national average attendance of 2.25 days per week⁴⁹. The survey average days of attendee have been used in the future child care use methodology. The survey did not ask respondents about their choice of actual days in order to gain greater understanding of vacancies throughout the week.

Sixty-three respondents were on waiting lists for ECEC or OSHC, the majority for long day care. Some respondents commented on long waiting lists and not being able to find the child care they needed.

Respondent concerns about waiting lists related to lack of transparency about how places are allocated, the length of time to get a place particularly for babies, and why OSHC places are not part of what is offered as part of accepting a school place.

Recommendations

Due to the low response rate from low income families that are potentially experiencing vulnerability or disadvantage, more targeted and personal engagement will need to be undertaken with these families to understand their experience and insights, as a separate piece of work or as part of the next Child Care Needs Analysis.

Given the survey findings indicated child care located close to home was more important than it being located close to work; further research will need to be undertaken to understand the needs of workers in the City of Sydney.

Further research with centres will enable the City of Sydney to understand demand peaks and troughs throughout the week, and vacancy rates on any particular days.

9. Future ECEC and OSHC supply methodology

This section of the report outlines the methodological approach used by FAW and agreed to by the City of Sydney to determine current and future ECEC and OSHC demand to 2036.

Agreed methodological approach

This methodological approach uses data from the ABS *Childhood Education and Care, Australia June 2017 (Cat 4402.0)*. This data set is used as it clearly identifies days and weekly hours of use of long day care and before and/or after school care. This data specifically excludes use of preschool and vacation care.

The following outlines a step by step approach to determining demand for long day care and before and/or after school care.

1. To calculate current and future demand we need to identify the total number of children aged from birth to four years and five to 11 years for the City of Sydney and for each Village area in 2018 (using estimated resident population) and 2036. These age break ups are used as long day care is targeted to children aged from birth to four years, and before and/or after school care is targeted to children attending primary school aged from five to 11 years. This data is sourced from Population and Household Forecasts, 2018 and 2036, prepared by .id.
2. Not all children use long day care or before and/or after school care. ABS data from the *Childhood Education and Care, Australia June 2017*, Table 1 shows that 43 per cent of all children aged from birth to four years and 17 per cent of all children aged from five to 11 years use some type of formal child care⁵⁰. To calculate the possible numbers of children who may use formal child care these percentages are applied to the total child population and each Village population in 2018 and 2036.
3. This provides an estimate of how many children may use some type of formal child care. The next step is to determine how many of these children using formal child care are using long day care or before and/or after school care as their formal care option. The same ABS data (Table 1) shows that:
 - 85 per cent of children aged from birth to four years using formal care are using long day care
 - 87 per cent of children aged from five to 11 years using formal care are using before and/or after school care and
 - seven per cent of children aged from five to 11 years using formal care are using long day care.

⁵⁰ Formal child care is considered to be “regulated care away from the child’s home”. bs.gov.au/AUSSTATS/abs@.nsf/Latestproducts/4402.0Glossary1June%202017?opendocument&tabname=Notes&prodno=4402.0&issue=June%202017&num=&view=, accessed 25 June 2019.

To calculate the possible number of children who may use long day care or before and/or after school care these percentages are applied to the proportion of children from step two who may use formal child care in the City and by Village area in 2018 and 2036.

4. Some families are not able to access any or adequate child care to meet their needs. These families have an unmet demand for child care that the market is not providing for. The same ABS data (Table 18) indicates that eight per cent of families require additional formal child care; therefore, eight per cent of all children aged from birth to four years and five to 11 years in the City area and each Village may require additional long day care or before and/or after school care in 2018 and 2036.

To calculate unmet demand this eight per cent is applied to the total child population in 2018 and 2036 for the entire City and each village area.

5. We now know the estimated total number of children that may use or need long day care or before and/or after school care in 2018 and 2036. However, most children use formal child care on a part time basis regardless of their parents' workforce participation.

As part of this report parents responded to an online survey – Understanding your child care needs. Parent respondents who were currently using child care were asked to indicate how many days per week their child attended different types of care. Results from the survey shows that the current ratios of children to one full time child place are:

- 1.53 children per one long day care place and
- 1.48 children per one before and/or after school care place⁵¹.

These ratios are applied to the possible total demand calculated for long day care or before and/or after school care in the City and by Village area in 2018 and 2036. This calculation provides us with the equivalent full time child places that may be required in 2018 and 2036.

This assumes no dramatic changes to children's services, families' workforce participation and preferred child care use. As noted earlier in the study, the City will need to closely monitor these trends.

6. From the market survey in section seven of this report we know the estimated number of long day care and before and/or after school care places in the City and by Village area.

Section four of this report shows the number of DAs that have been approved by Village area. AS of June 2018 there were 21 DAs that were either under construction, approved pending commencement of construction or lodged pending approval that could provide a total of 1,350 places if all go ahead. These DA places have been added to the 2036 Village market supply to calculate total future child places.

These numbers are matched together to calculate possible over or under supply of long day care and before and/or after school care in the City and by Village area in 2018 and 2036.

Non-resident worker population

The same methodological approach is applied to the non-resident worker population in the City as some non-resident workers would be accessing ECEC services close to work to enable them to participate in the paid workforce. 2018 and 2036 non-resident worker populations are sourced from the City of Sydney's internal projections.

51 Parent survey conducted as part of this research – Understanding your child care needs (2019).

To calculate the possible number of children aged from birth to 5 years not at school for these non-resident workers, the City requested additional data from the ABS 2016 Census showing the number of children aged birth to four years and five to 11 years by local government area of residence, where:

- either one parent of a couple family works in the City of Sydney local area
- both parents work in the City of Sydney local area or
- if a lone parent household, that parent works in the City of Sydney local area.

Children of parents who live outside of metropolitan Sydney have been excluded from the analysis, as they are unlikely to come into the local area for child care.

Not all of these non-resident workers with children would bring their children into the City local area to access child care close to work. The following assumptions have been made about child care use of non-resident workers:

- The number of children where only one parent of a couple family works in the City of Sydney local area has been halved to allow for these children to go to child care close to home or the other parent's workplace.
- Not all non-resident workers with children aged from birth to 4 years will want to travel into the City with their children to access child care close to work. A distance index has been applied assuming that non-resident workers who live in close proximity to the City are more likely to use child care close to work. The proximity calculations using this methodology are that 66.7 per cent of children from local government areas within 10 km of the City are likely to use child care in the City; 33.3 per cent of children from local government areas within 10 km and 20 km of the City are likely to use child care in the City; and those beyond 20 km will not use child care in the City.

The methodology has highlighted a number of challenges in predicting demand of child care for non-resident workers, including, cost, location and length of commute. Potentially, these workers comprise the largest percentage of users of child care within the CBD. The number of workers is projected to increase significantly over the coming years.

Recommendation

This is a unique challenge for the City and therefore it is recommended the City undertakes further research to refine and understand worker child care demand.

Methodological limitations

One limitation of this data is that the proportion of children who attend preschool as a separate service type is no longer included in the survey *Childhood Education and Care, Australia June 2017*. The exclusion of this measurement commenced with the advent of the new regulatory framework in 2010 when it became compulsory for all ECEC services to deliver a preschool program regardless of service type. There is a separate ABS preschool survey that measures child attendance at a preschool program. The use of this survey would not add to the methodological framework as it only measures children in the year before they attend formal school and does not distinguish between long day care and preschool use.

It is important to note that the survey does not include information on vacation care. It does include information on before and after school care, however it does not count before school care services and after school care services as separate entities but as one inclusive OSHC service type.

10. Current and future supply of ECEC and OSHC services

This section of the report considers whether the existing supply of ECEC and OSHC services in the City of Sydney meet the current and potential future child population demand for care to 2036.

Resident demand is calculated by Village area and non-resident worker demand by all of the City of Sydney.

Current supply of ECEC and OSHC services

As of March 2019 there were 106 long day care services providing 6,585 places, 31 OSHC services providing 2,475 OSHC places, and nine preschool services providing 416 places. The following table shows the number of service by type and approved places.

Table 86. Number of services and approved child places in the City of Sydney

Service type	Number of services	Number of approved places
Long day care	106	6,585
OSHC	31	2,475
Preschool	9	416

Source: ACECQA Registers, March 2019, market survey for this report

Approximately 24 per cent of places for children aged from birth to five years were for children aged from birth to less than two years.

The following table shows the Village areas with the largest number of services.

Table 87. Number of long day care and preschool places by Village

	LDC	Preschool	Estimated total number of places
CBD & Harbour	1,632		1,632
Chinatown & CBD South	287		287
Crown & Baptist Streets	419	69	488
Glebe Point Road	507	178	685
Green Square & City South	1,753		1,753
Harris Street	583		583
King Street	418	39	457
Macleay Street & Woolloomooloo	142	70	212
Oxford Street	288		288
Redfern Street	556	60	616
Totals	6,585	416	7,001

Some services could not be contacted or were not able to provide this information

Source: ACECQA Registers, March 2019, market survey for this report

Very few long day care services were operating at full capacity, with vacancies across most days and age groups; some CBD centres having only 30% occupancy. Around two thirds of long day care centres had waiting lists with waiting times varying from a few weeks to 12 months (very few services). Waiting lists were often for children yet to be born or where vacancies did not with fit parent needs.

The total column shows the total number of approved OSHC places in each Village area as some services often voluntarily cap their operational places for before school care due to lower demand from families.

Table 88. Number of OSHC places by Village area

	Before	After	Vacation	Estimated total number of places
CBD & Harbour	115	145	145	145
Chinatown & CBD South	–	–	–	0
Crown & Baptist Streets	120	300	240	360
Glebe Point Road	165	320	170	550
Green Square & City South	105	155	140	155
Harris Street	–	75	75	90
King Street	337	450	366	520
Macleay Street & Woolloomooloo	4	52	53	75
Oxford Street	232	265	40	390
Redfern Street	–	190	145	190
Totals	1,078	1,952	1,374	2,475

Some services could not be contacted or were not able to provide this information

Source: ACECQA Registers, March 2019, market survey for this report

Many after school care places were at full capacity with greatest demand for after school are in Green Square, and Harris, King and Oxford Streets. There were vacancies for before school care and vacation care.

Summary

ECEC supply and demand

Using 2018 population data, this study shows long day care places across the City for residents and non-resident workers just meets demand; there is a small under supply of 153 places. While the data showed pockets of under supply in some Village areas, particularly in CBD & Harbour and Chinatown & CBD South, this does not reflect the experience of many child care providers in these Villages, who are not operating at capacity. This highlights the need to further investigate the demand from non-resident workers.

Green Square & City South and Chinatown & CBD South, currently shown as areas where places exceed demand, is an area in transition. These urban renewal areas will more than double in population by 2036, and it is estimated the over-supply will be reduced from that shown in 2018.

By 2036 the under supply will increase to 1,492 as the resident and worker populations grow. This assumes that all facilities subject to a development application are built and operating. In addition, it is likely further development of child care facilities will occur over this period.

Given the significant potential demand generated from workers, it is recommended the City undertake further research and ongoing monitoring to understand needs and trends for child care usage by the children of non-resident workers.

A degree of oversupply is important in the child care system as it allows parents and carers the option of a choice of provider and means services can accommodate short-term changes to employment patterns and child care needs.

OSHC supply and demand

Overall in 2018 the supply of before and/or after school care places across the City for residents was higher than demand; and in 2036 it is anticipated supply will continue to meet demand. However, a number of schools, service providers and parents indicated there was an undersupply of places for after school care. This suggests that the location of places is not aligned with local demand.

The over-supply of OSHC places is more in line with the findings of the market survey where OSHC services had vacancies in before school care and vacation care. The pressure point for OSHC care was for after school care. Many of the schools located in the catchment areas for the Villages with potential undersupply of before and/or after school care places have had growing child populations in the period 2012 to 2018. Some of the OSHC providers in these Village areas were full or operating at close to full capacity for after school care only; all before school care programs operated with vacancies.

Some survey respondents (24) specifically commented on the lack of availability of after school care places and that these services should keep in line with growing school populations.

“OOSH program at [school name withheld] Public School is facing uncertainty. It is oversubscribed so that many families are missing out and are struggling to find alternatives ... I’m worried about affordability for our family if this [OSHC property rental increase] is passed on to us. Many families using the care pay significantly reduced fees (large local vulnerable community) and so I am concerned that they may be priced out, or that our family will be faced with even bigger fee increase to support those families. If we need to remove our children from afterschool care the 2 days per week they go (using our flexible working to the max) it will significantly increase stress in our family and there is a high chance it will tip our mental health. I would expect many families to be feeling the same way right now. If the City can do anything to help with this situation it would be incredibly helpful!!!”

“Subsidised vacation care options in the CBD would be great.”

“There are minimal spaces available in OOSH care at my daughter’s school. We were lucky enough to get 5 days after school, but other families had to scramble. I feel that if your child goes to that school, OOSH care should be available to you. How else are working parents meant to work office hours?”

“I have been completely unable to get aftercare at the school since my children started. There needs to be family daycare for school aged children.”

“Whilst the care attached to the school is good – it’s not always available – particular in school holidays or for occasional days. Some affordable and local school holiday activities would be very welcome.”

Supply barriers to accessing care

The ECEC and OSHC survey showed that many ECEC services and some OSHC services had vacancies.

The parent survey showed that one in five parent respondents (18 per cent, 56) were not using their preferred ECEC or OSHC. Reasons cited for not using preferred ECEC or OSHC included the prohibitive cost of care, not being located close to home, the quality and/or desired program being delivered by the service, and parents needing care outside of regular business hours.

Some parent respondents indicated that they were unable to find the child care that they wanted and were waiting periods of time to access care.

How can ECEC services have vacancies and parents are still not able to access the care they need or want? Insights from the parent survey indicate that:

- the days or hours that a service has available does not match family needs
- there are vacancies in particular age groups that do not match the age of children in a family
- daily fees for CBD based long day care may not be affordable for some families or
- the hours of service provision may not suit some families particularly those who work long hours, flexible hours or shift work.

Child care service operating practices may also create barriers to accessing care.

- Some services prescribe minimum days, particular days, or hours of attendance, and these may be more than or not suit what a family requires.
- Some services prescribe the need for consecutive days of attendance and these may not fit with what a family needs.
- Some services may close for more weeks over the Christmas/New Year period than a family can manage with their leave accruals.
- Increasingly more services are charging fees to go on waiting lists and some families may not be able to afford to pay fees to go on multiple waiting lists.

Anecdotal information from FAW employee surveys indicate that where available and affordable, families prefer child care close to the workplace for babies and toddlers; providing a level of comfort for parents in the case of an accident or emergency, and the ability to visit their child as needed. The corollary is that families prefer older children to attend child care close to home so that children are meeting other local children who may be part of their future school cohort.

Some ECEC providers also commented on the length of time babies and toddlers attend ECEC services. Babies and toddlers are often in care for more hours per day than older children.

11. Alternate child care provision models and service delivery

This section of the report considers alternate models of child care provision that could support different groups of children to access children's services.

The efficacy of existing models for future delivery

The City of Sydney predominantly relies on the market place to deliver ECEC and OSHC services in the local area.

In the four year period from 2014 to 2018 the City received 32 Development Applications for child care construction. Most of this growth has or will occur in the village areas of Green Square and City South (eight services) and Redfern Street (six services).

The City provides updated data related to the existing children's services market place and encourages potential child care providers to use this data to inform their decisions regarding sites.

Future child care provision and the changing nature of work

Most families access child care to facilitate workforce participation. ECEC services are structured around providing education and care to suit regular work hours. How will the changing nature of work impact on child care use?

There are significant shifts occurring in the work place. The 'gig' economy, with greater use of short-term workers and contracts, and increasing use of artificial intelligence (AI) are changing how and when people engage with the workforce. Deloitte talks about shifts in the type of work being done, the workforce itself and the workplace⁵².

⁵² deloitte.com/insights/us/en/focus/technology-and-the-future-of-work/redefining-work-workforces-workplaces.html, accessed 11 June 2019.

Shifts in type of work being done

Globally it is predicted that 60 per cent of occupations have at least 30 per cent of task work that could be automated⁵³. While the Organisation for Economic Cooperation and Development (OECD) estimates that 9% of jobs are at risk due to automation⁵⁴; countries with advanced economies, such as Australia, will be more impacted due to higher wages and an economic imperative to automate. In Australia it is predicted that around 23 per cent of work activities will be displaced by AI by 2030⁵⁵.

Between three to 14 per cent of the global workforce will need to switch occupational categories to remain in paid employment⁵⁶. Employment growth is most likely to occur in industries such as services, infrastructure and energy. The service economy is predominantly a female sector comprising health care, social assistance and education.

There will be an increase in high wage occupation growth for professional workers and a decline in middle income occupations.

One of the biggest job loser groups will be lower educated males often engaged in work that relies on physical capability such as labouring and machine operations; tasks that are at high risk of technological disruption⁵⁷.

Shifts in the workforce

There will be a shift in how people engage with the workforce. More people will become contingent workers providing specialist skills to supplement in-house generalists. In 2016, 11.6% of the Australian workforce was an independent contractor/freelancer⁵⁸, and it is anticipated that this will increase over time. More and more workers will hold multiple jobs.

Workplaces will shift from completing tasks to “problem solving and managing human relationships”⁵⁹.

Employers will no longer “attract, develop and retain ... [they will] ... access, curate and engage” their internal and external workers⁶⁰. Employers will be required to manage worker expectations that meet multi-directional career and personal life goals.

Shifts in the workplace

Automation and IT will continue to enable changes to where work gets done. There will be a shift from traditional office co-location to virtual interactions; and combined with more contingent workers will create challenges about how to foster “culture and team connections”.

53 James Manyika, Susan Lund, Michael Chui, Jacques Bughin, Jonathan Woetzel, Parul Batra, Ryan Ko, Saurabh Sanghvi (2017) *Jobs Lost, Jobs Gained: Workforce Transitions in a Time of Automation*, McKinsey & Company, p. 2.

54 OECD (2017) “Future of Work and Skills”, paper presented at the 2nd Meeting of the G20 Employment Working Group, Hamburg, Germany, p. 8.

55 OECD (2019) *The Future of Work, How does Australia compare? OECD Employment Outlook 2019*, p. 1.

56 McKinsey & Company, *ibid.*

57 Bank West Curtin Economics Centre (2018) *Future of Work in Australia, Preparing for tomorrow's world*, p. 87.

58 *ibid.*, p. 19.

59 Deloitte, *op cit.*

60 Deloitte, *op cit.*

There will be increased use of workplace flexibility and flexible work practices as how and when work gets done changes. More workers will not be required to be physical present to perform tasks but rather engage in virtual teams solving problems and creative thinking, and this could be locally or globally.

Flexible child care

Current ECEC and OSHC provision is predicated on regular (as we know it now) business hours.

In the past there have been extended hours and 24/7 child care centres to specifically accommodate parent employees requiring care outside of standard hours, including The Star casino and in large CBD precincts. However, utilisation outside of regular business hours was very low or not at all, resulting in all of these services discontinuing care outside of regular business hours.

The most recent Child Care Flexibility Trials were conducted by the Australian Government in 2013 and 2014. Options included early open and late close times in long day care, offering weekend care and overnight care in long day care, and family day care educators offering 24/7 care changeable at short notice.

These trials were evaluated by the Australian Institute of Family Studies (AIFS) who reported that:

- flexibility meant different things to different families. It could be access to non-standard hours or flexibility with booking arrangements to change child days and hours to match changing shifts
- flexibility was just one of the things families wanted from their child care arrangements
- there was a high cost associated with delivering this care including wages with shift loadings for service staff and
- success was dependent on educator availability and service capacity⁶¹.

ECEC and OSHC industrial frameworks are also based on regular business hours. There is a cost impost to a service provider operating outside of regular business hours and this cost would be passed on to families through increased fees for this type of care.

Currently it is very challenging to identify a sustainable, flexible and affordable model of extended hours ECEC or OSHC.

What does this mean for child care in the future?

Working from home is not a substitute for child care. Freelance/contingent parent workers will still need access to child care, and this child care is most likely to vary as freelance work ebbs and flows.

The current ECEC and OSHC models may not be fit for purpose for the future of work.

Alternate models of service delivery

The following are some emerging child care models in Australia. The City may want to consider these in the future. Integrated child and family services and intergenerational care models are some examples that could be actively pursued with a view to supporting some of the outcomes in *A City For All – Towards a Socially Just and Resilient Sydney*. For example, co-working spaces located with on-site child care is a way to support individual workers or small office-based businesses to provide child care to their employees.

61 aifs.gov.au/publications/flexible-child-care#footnote-000, accessed 11 June 2019.

Integrated child and family services

The Victorian Government is providing capital funding for integrated child and family services. These services are community hubs providing a range of education and care, health, and child and family services as needed by the community. To be eligible for these grants services must include at least 66 child places in a preschool or long day care centre, maternal and child health services (the Victorian equivalent to early childhood health centres), allied health services providing early childhood intervention and prevention, and family services. Additionally the design of the service needs to be flexible, providing multipurpose spaces and other services that meet the needs of the local community. This could include supported playgroups, parenting programs, community meetings spaces or adult education programs.

Integrated child and family services are designed so that there is physical integration with multiple services delivered in one building and/ or one room; and practice integration, for example, with one service provider employing staff of diverse services with a common commitment to collaboration, actively supported referrals and sharing of family information as needed to enable joint work with children and families.

Intergenerational care

There are some emerging Australian examples of children's services and aged care services working more closely together. Griffith University in the Gold Coast is conducting an Intergenerational Care Project looking at two operating models – a shared campus or visiting campus.

There are benefits of intergenerational learning for children and older people and the following extract from Griffith University summarises these benefits⁶².

I Benefits of Intergenerational Learning Programs

FOR CHILDREN

- Provide an opportunity to learn from and connect with the older generation
- Helps improve the behaviour that children show towards older people in general
- Improvements in children's pro-social behaviours of sharing, helping and cooperating
- Decrease likelihood of juvenile delinquency in later life

FOR OLDER PEOPLE

- Provide older adults with a sense of purpose
- Enhance the dignity experienced by older people
- Alter communities' perceptions of older adults and the ageing process from negative to positive
- Improve the social outcomes of older people
- Encourage older people to remain living in their home for longer

Source: <https://www.intergenerationalcare.org/wp-content/uploads/2019/08/IGC-MEDIA-KIT.pdf>, accessed 9 May 2019

62 <https://www.intergenerationalcare.org/wp-content/uploads/2019/08/IGC-MEDIA-KIT.pdf>, accessed 9 May 2019.

Some children's services have implemented informal visiting arrangements where groups of preschool children visit local residential aged care facilities on a regular basis, engaging in planned activities with the older residents such as arts, craft, music and movement.

Various state Playgroup Associations have successfully implemented intergenerational playgroups, including a publication from Playgroup Victoria about starting playgroups in aged care facilities⁶³.

Co-working spaces and child care

There are an increasing number of co-working offices being established in the City area. Co-working spaces enable individuals or small teams to work independently or collaboratively in shared office space. Tenants pay for access to a fully serviced office that could range from a desk space to a private office. Some of these co-working spaces are now offering access to informal child care through an on-site creche where tenants can leave their children with paid child carers; however, the tenant cannot leave the premises as the is not an approved provider. One co-working space in Melbourne- Happy Hub Bub – provides an approved 16 place child-care centre that caters to children from four months to 5 years charging \$129 per day for a permanent booking and \$139 per day for a casual booking.

Recommendation

The City's focus in the future should be targeted to specific needs in particular locations including children and families experiencing vulnerability; affordability for families on low income; and flexibility of service delivery for a changing workforce.

Pros and cons of operating models

The City is a direct service provider, a landlord through commercial leases and recipients of the AGPs in return for social benefit, and a child care developer most recently constructing four long day care centres; covering all areas of child care provision.

There are very limited alternate operating models that the City could consider and these are mostly adaptations of existing service delivery models. These adaptations could relate to provision of land, or preferred governance structure of child care providers in City owned premises.

⁶³ playgroup.org.au/site/DefaultSite/filesystem/documents/VenueDocs/Starting%20Playgroups%20in%20Aged%20Care%20Facilities.pdf, accessed 9 May 2019.

12. Recommendations

The *Child Care Needs Analysis 2019* outlines a complex range of factors that influence the supply and demand of ECEC and OSHC services in the City of Sydney local area. The study shows that overall, supply is meeting demand, with only a small short-fall predicted to 2036. It is anticipated that this gap is likely to be met through the supply of privately operated childcare.

This study shows a different landscape to the 2013 study, where there was a significant undersupply of ECEC places and the undersupply was forecast to continue to 2031. Recommendations in 2013 were focussed on increasing the supply of places through investment, advocacy, and planning agreements. In addition, it was recommended the City of Sydney focus on strategies to improve access for ECEC for families experiencing vulnerability and disadvantage, and update its Development Control Plan for child care.

Building on the 2013 study, this report identifies a range of opportunities and recommendations for the City of Sydney to continue to facilitate the provision of quality ECEC and OSHC to meet ongoing demand. The report highlights the different roles and functions of local governments in child care, including as providers, enablers, and strategic land use planners.

The key opportunities relate to:

- ongoing monitoring and analysis of data to identify trends and issues
- facilitating access to ECEC and OSHC for families experiencing vulnerability and disadvantage
- emerging models of care, future service models and workforce changes
- updates to planning guidance and building best practice
- advocacy role in supporting the needs of children and families within the City.

Recommendation 1: Regular monitoring and data analysis

There are a range of variables that will impact supply and demand of ECEC and OSHC that will need to be closely monitored by the City of Sydney over the coming years.

In 2019, there were 115 ECEC services in the City of Sydney, providing a total of 7,001 approved places. This has grown from 4,502 ECEC places in 2013. In 2019 there were 31 OSHC services providing 2,475 places. This growth in supply is supported by comments in the parent survey which indicate more than 80 per cent of respondents are using their preferred ECEC or OSHC. Continuing to monitor DAs for child care centres to understand supply trends will be important.

With the City's residential and worker population forecast to increase significantly to 2036, it will also be important to monitor population and worker growth, as well as supply and demand patterns overall and at a Village level.

With the City of Sydney serving as a major CBD, the study has highlighted a significant proportion of child care demand generated by non-resident workers and the importance child care plays in enabling economic development within our City. Service providers located in CBD areas have indicated that utilisation rates are lower than what would be expected from the current analysis. Therefore, this study recommends further research into the barriers and drivers for non-resident workers to use child care in the City of Sydney, particularly the CBD areas.

Further research with centres to understand demand peaks and troughs throughout the week, and vacancy rates on any particular days may also enable greater insights.

Recommendation 2: Ensuring access for all

Consistent with the 2013 study, this study identifies the critical role for the City of Sydney in the ongoing facilitation of access for families experiencing vulnerability and disadvantage. This is especially important following the introduction of the income and work activity tested CCS by the Federal Government in 2018, which has changed the financial assistance model for ECEC and OSHC.

While most families are better off with more financial assistance, some families who do not meet the new work activity test are eligible for less care than under the previous schemes.

At a State level, the NSW Government's Start Strong program has provided funding to reduce costs for children to attend preschool in the year before they start school.

This report includes an analysis of the AEDC which shows that overall children in the City of Sydney are less-developmentally vulnerable when compared to children across the whole of NSW. However, in Rosebery and Woolloomooloo the proportion of developmentally vulnerable children is particularly high.

Given the importance of ECEC to improve learning, health and well-being outcomes for children, the report highlights the importance of the City's AGP and the specific performance criteria to encourage access by families experiencing vulnerability and disadvantage.

In addition, the parent survey indicated that affordability of child care was an issue for more than half of the respondents; further highlighting the need for affordable and quality child care such as that provided by services through the AGP

It is therefore recommended that:

- the City continues to facilitate the AGP, with specific performance criteria which target families experiencing vulnerability or disadvantage, as a key strategy to provide access to ECEC for these families
- the City continues to monitor the attendance of vulnerable families, through the annual reporting by the service providers in the AGP to identify emerging trends and respond to changes
- the City looks to continue, and try new, strategies to encourage the uptake of places for children in target groups, and/or remove barriers to accessing ECEC
- the City monitors any changes to the numbers of children attending its children's services located in Redfern, Surry Hills, and Woolloomooloo
- the City engages with families that are potentially experiencing vulnerability or disadvantage to understand their experience, insights and child care needs
- the City undertakes further research into areas with higher than average proportions of children who are developmentally vulnerable, to further inform local child care strategies, programs and services.

Recommendation 3: Future service models

The City of Sydney directly manages 10 ECEC and OSHC services, including one long day care centre, two preschools, one occasional care, and six OSHC services. In addition, there are 21 child care facilities operated through the AGP, commercial leases and work-based care.

The report includes opportunities for emerging models of care such as intergenerational care, integrated care, and co-location with co-working spaces.

The study also notes the changing workforce trends, including more virtual interactions, short-term, specialised contracts and freelance roles and its implications for how childcare could be provided in the future.

The report recommends the City's investigate emerging models of care and consider how it can evolve its delivery model in the future to better meet changing needs. As part of this, the study also recommends the City considers the opportunities of greater integrated child and family services across all the City's planning, services and programing.

Recommendation 4: Updated planning guidance

A SEPP for child care was introduced by the NSW Government in 2017, which overrides the City's DCP. The SEPP is less-specific than the City's DCP. The City may want to develop a best-practice guideline to describe optimum built environments for child care centres, interactions between spaces, child age break ups and maximum numbers of children, and above ground floor facilities. This will provide an extra tool for the City to influence the provision for quality environments for children, where issues are not addressed by the DCP or SEPP.

Recommendation 5: Ongoing advocacy to support child care

As a global city and as a direct service provider, this study outlines City's important role as an advocate for children and families within the City. This includes not only promoting quality and access of ECEC and OSHC, but as an important influencing voice in broader policy changes that impact on ECEC and OSHC supply and demand.

It references the important role of children and young people in the City of Sydney, as articulated through the City's Social Sustainability Policy and Action Plan, *A City for All*. In addition, this study outlines the benefits of formal education and care for children and young people.

It is recommended that the City continue its participation in children's services organisations that advocate for quality and access for ECEC and OSHC services, such as Early Childhood Australia (ECA), Australian Community Children's Services (ACCS), and the Local Government Children's Services Managers Network.

Given the issues with after school care noted in the study, it is recommended the City of Sydney continues to advocate for, and monitor the supply of on-site OSHC. This includes the Department of Education's School Infrastructure program of works to redevelop and upgrade local schools and the inclusion of onsite OSHC.

Appendix A: List of all children's services owned or leased by the City of Sydney

Centre Name	Service Operator	Suburb	Operating Status	Service Approved places	Tenancy Status
CBD & Harbour					
Lance Pre-School and Child Care Centre	KU Children's Services	Millers Point	Operating	39	Accommodation Grant Program
Phillip Park Community & Children's Centre	KU Children's Services	Sydney	Operating	52	Accommodation Grant Program
Crown & Baptist					
John J Carroll Pre-School	KU Children's Services	Surry Hills	Operating	40	Accommodation Grant Program
Surry Hills Children's Centre	SDN Children's Services	Surry Hills	Operating	60	Accommodation Grant Program
Surry Hills Long Day Care	Surry Hills Neighbourhood Centre	Surry Hills	Operating	24	Accommodation Grant Program
Glebe Point Road					
Broughton Street Kindergarten	City of Sydney	Glebe	Operating	18	Council Operated
Hilda Booler Kindergarten	City of Sydney	Glebe	Operating	40	Council Operated
The Crescent Early Learning Centre	Good Start Early Learning	Annandale		80	Accommodation Grant Program

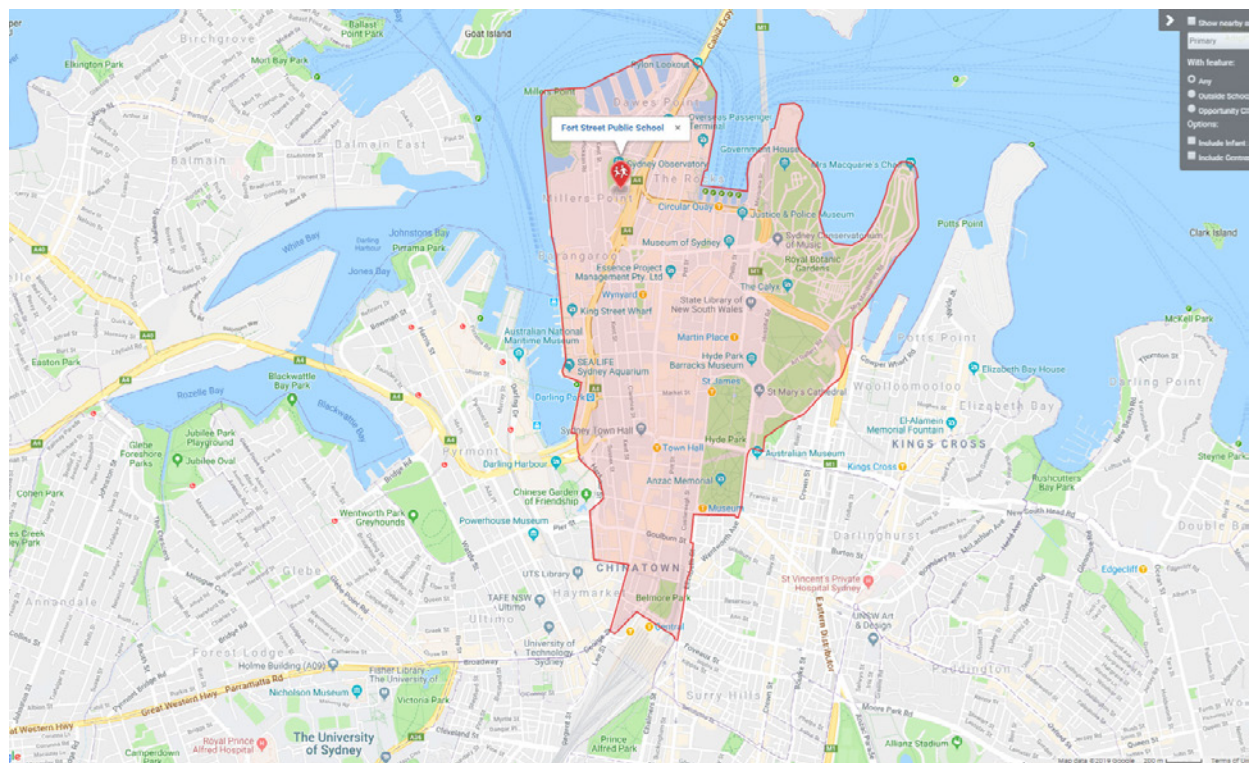
Centre Name	Service Operator	Suburb	Operating Status	Service Approved places	Tenancy Status
Green Square & City South					
Huntley Street Early Learning Centre	Good Start Early Learning	Alexandria	Operating	80	Accommodation Grant Program
Waranara Early Education Centre	Good Start Early Learning	Zetland	Operating	74	Accommodation Grant Program
Rosebery Child Care Centre – sub lease	Rosebery Child Care Inc (community based)	Rosebery	Operating	40	Accommodation Grant Program
Harris Street					
Kindy Patch 1	G8	Ultimo	Operating	45	Commercial
Kindy Patch 2	Believe	Ultimo	Operating	59	Commercial
Maybanke Pre-School	KU Children's Services	Pymont	Operating	30	Accommodation Grant Program
Ultimo Child Care Centre	KU Children's Services	Ultimo	Operating	65	Accommodation Grant Program
SDN Children's Services Pymont	SDN Children's Services	Pymont	Operating	40	Accommodation Grant Program
McKee Street Child Care Centre (Magic Pudding Child Care)	UTS Child Care Inc	Ultimo	Operating	61	Accommodation Grant Program
King Street					
Alexandria CCC	City of Sydney	Alexandria	Operating	66	Council operated
Sunbeam Kindergarten	KU Children's Services	Alexandria	Operating	37	Accommodation Grant Program

Centre Name	Service Operator	Suburb	Operating Status	Service Approved places	Tenancy Status
Macleay Street & Woolloomooloo					
Rushcutters Bay Childcare Centre	KU Children's Services	Rushcutters Bay	Operating	50	Accommodation Grant Program
Oxford Street					
East Sydney Early Learning Centre	Good Start Early Learning	Darlinghurst	Operating	60	Accommodation Grant Program
Redfern Street					
Chippendale Child Care	Children's Services Community Management	Chippendale	Operating	36	Contract Agreement
Redfern Occasional Care	City of Sydney	Redfern	Operating	36	Council Operated
James Cahill Pre-School	KU Children's Services	Waterloo	Operating	48	Accommodation Grant Program
Lois Barker Child Care Centre	SDN Children's Services	Waterloo	Operating	45	Accommodation Grant Program

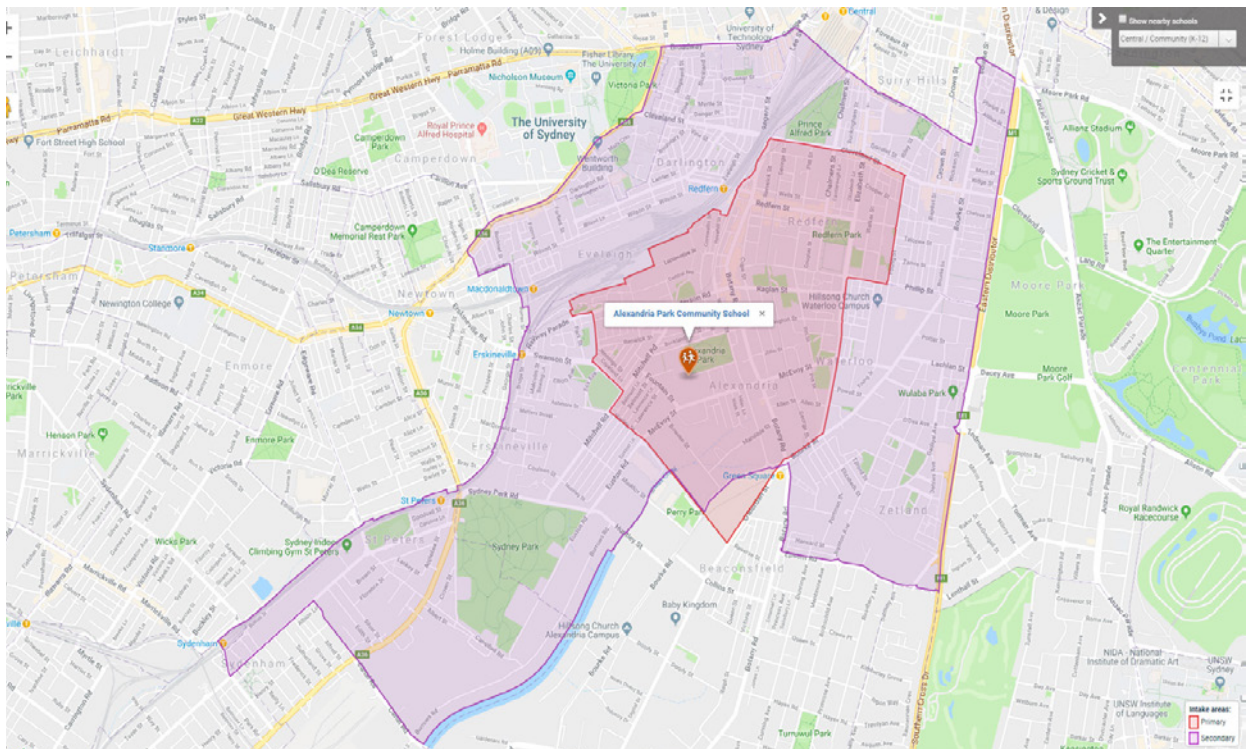
Appendix B: Department of Education primary school catchment areas

All maps were sourced from education.nsw.gov.au/school-finder (accessed 24 April 2019).

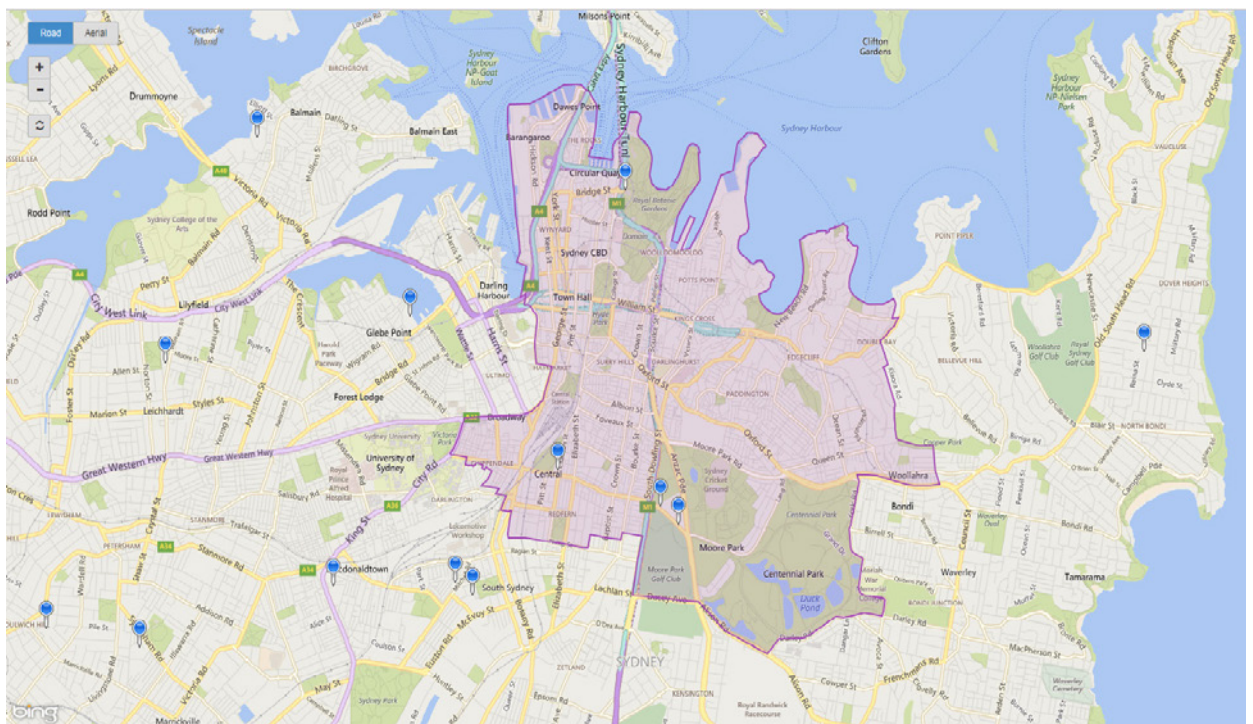
Fort Street Public School Boundary – School boundary encompasses all of CBD Harbour Village, and the eastern side of Chinatown & CBD South Village



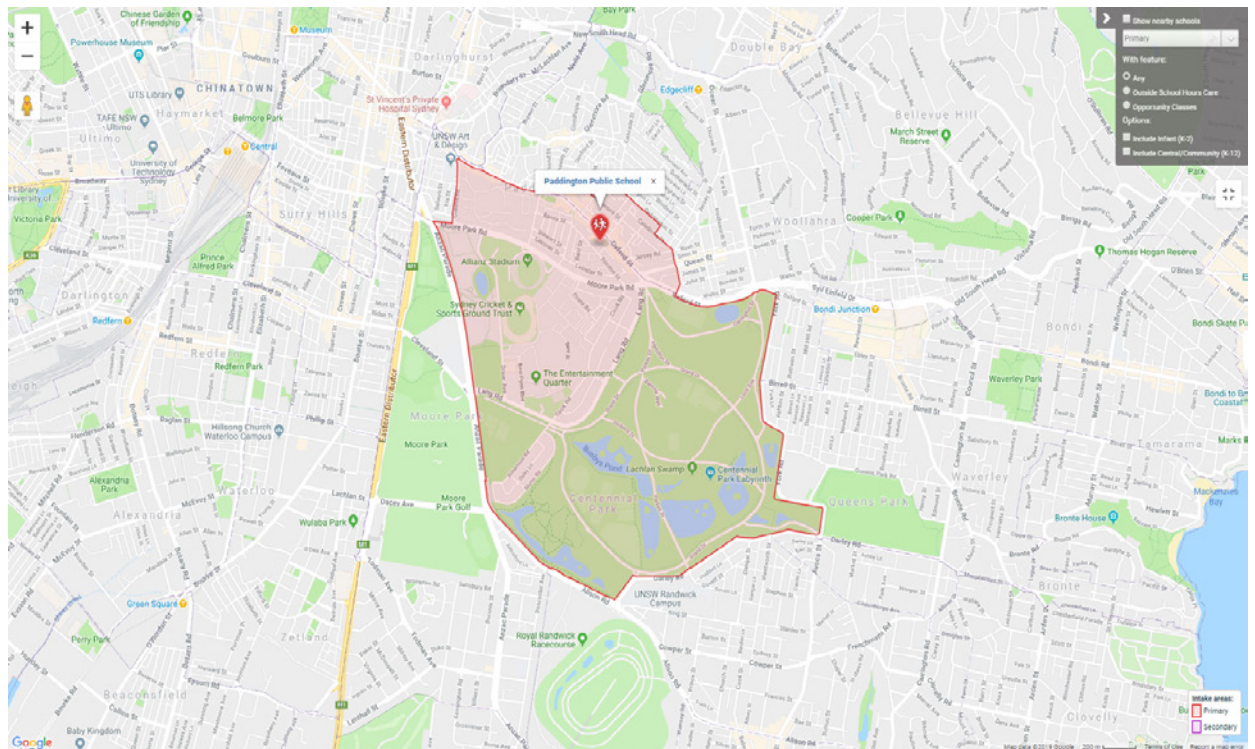
Alexandria Park Community School (red shaded area) – School boundary encompasses the eastern half of Redfern Street Village, and the western side of Crown & Baptist Street Village



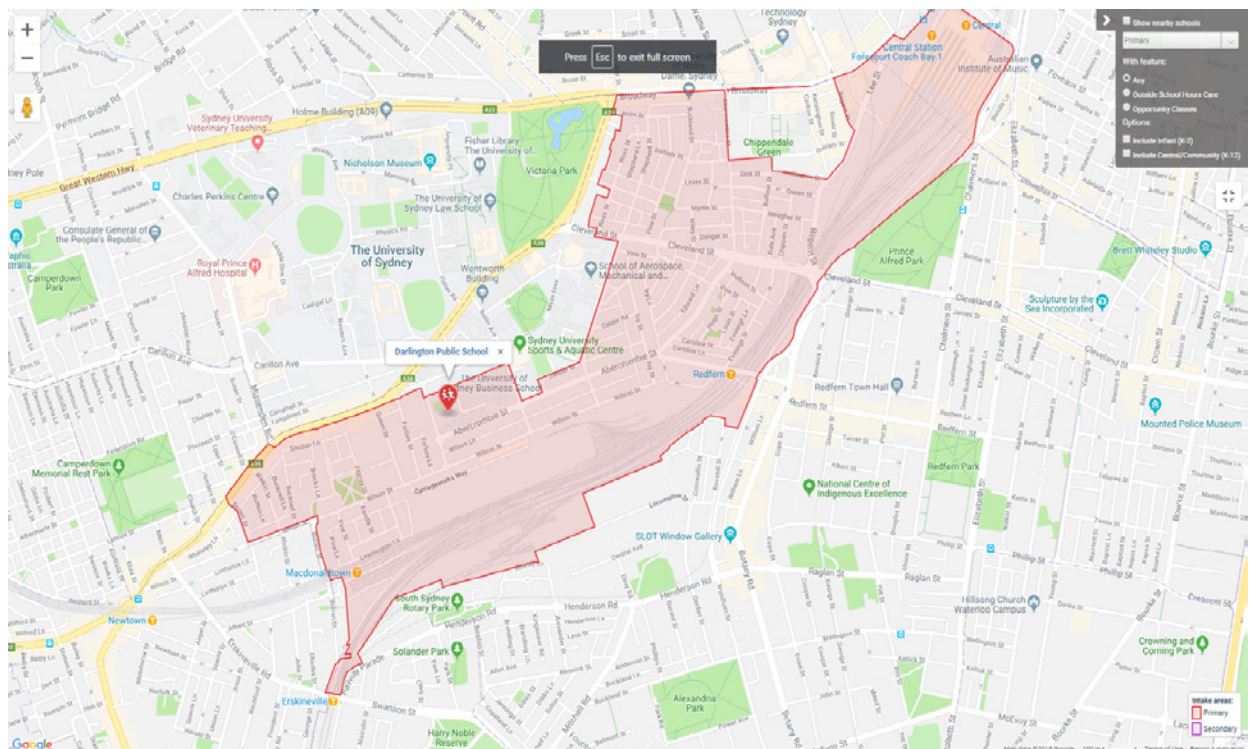
Inner Sydney High School – opening 2020 – School boundary will encompass CBD Harbour, China Town & CBD South, Macleay Street and Woollloomooloo, Oxford Street, the northern half of Redfern Street



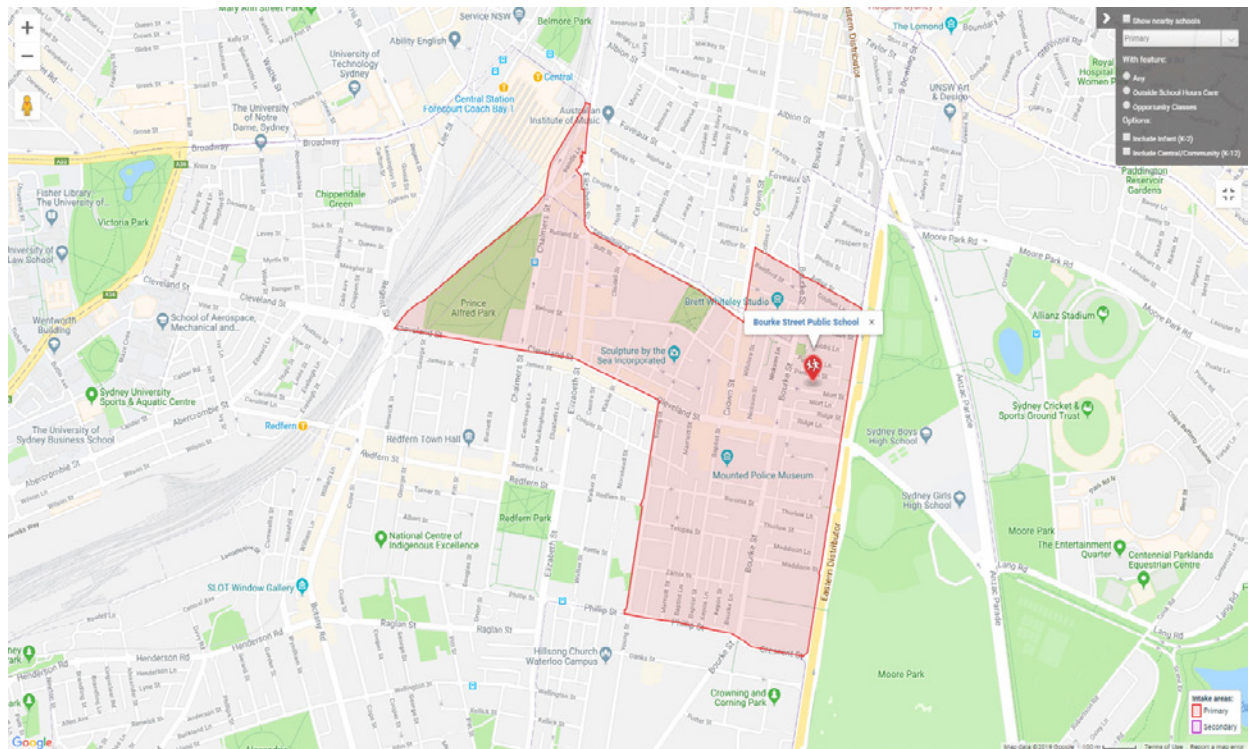
Paddington Public School – The school boundary is mostly entirely within Oxford Street Village, with a small part of its catchment in Waverley Council LGA



Darlington Public School – the School boundary is entirely within Redfern Street Village



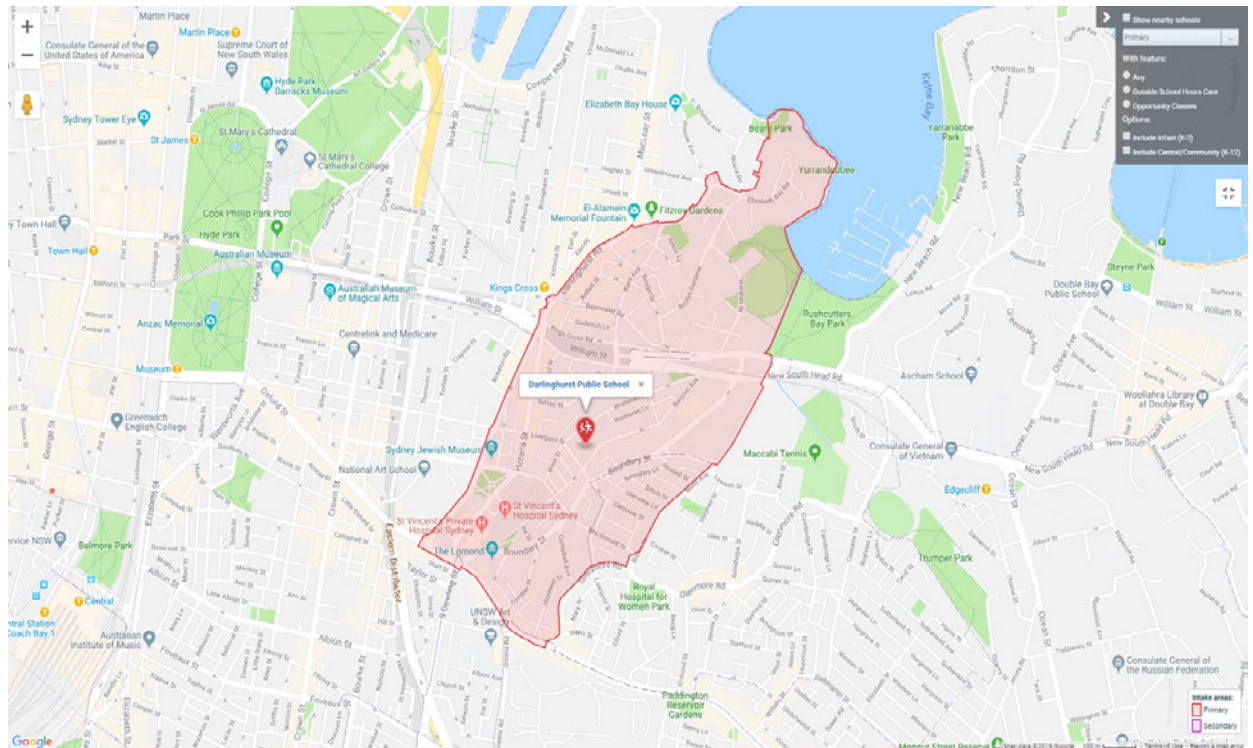
Bourke Street Public School – the school boundary is entirely within Crown & Baptist Streets Village



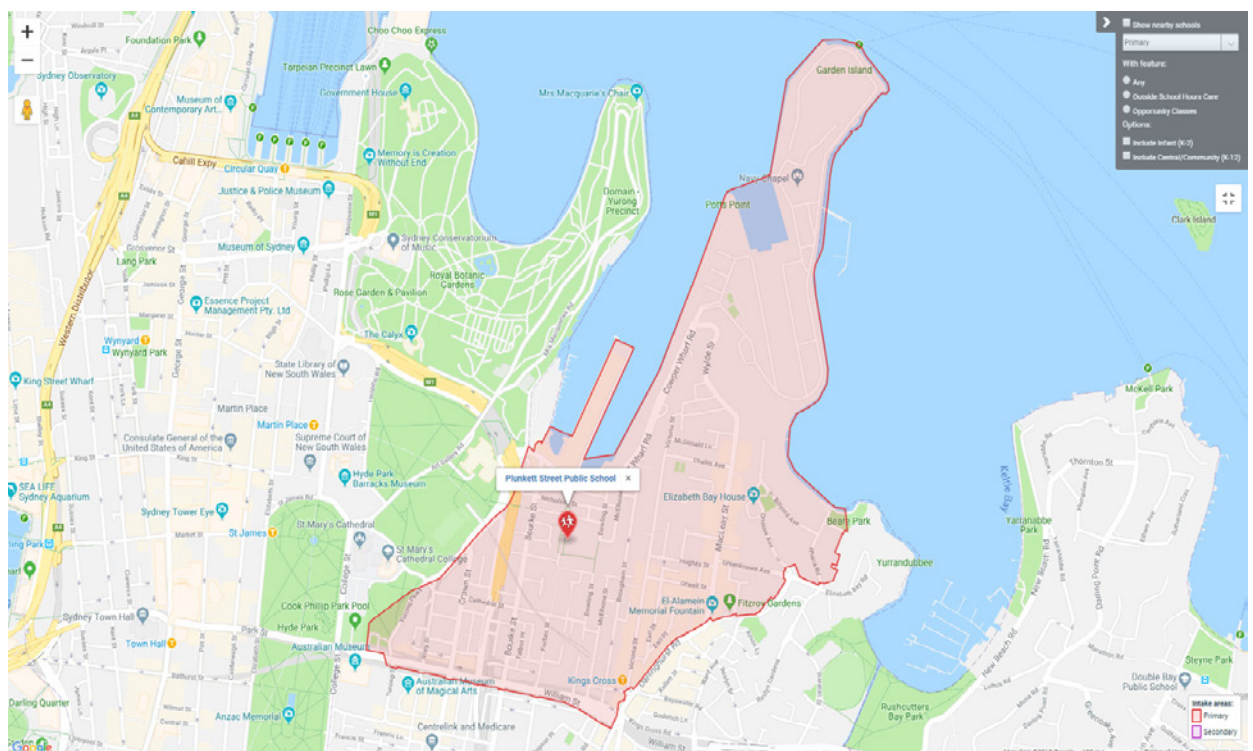
Crown Street Public School – the school boundary is mostly in Crown & Baptist Streets Village, with a slight overlap into Chinatown & CBD South NW of Wentworth Ave below Hyde Park, and a slight overlap into Oxford Street Village between the Eastern Distributor and Moore Park Road



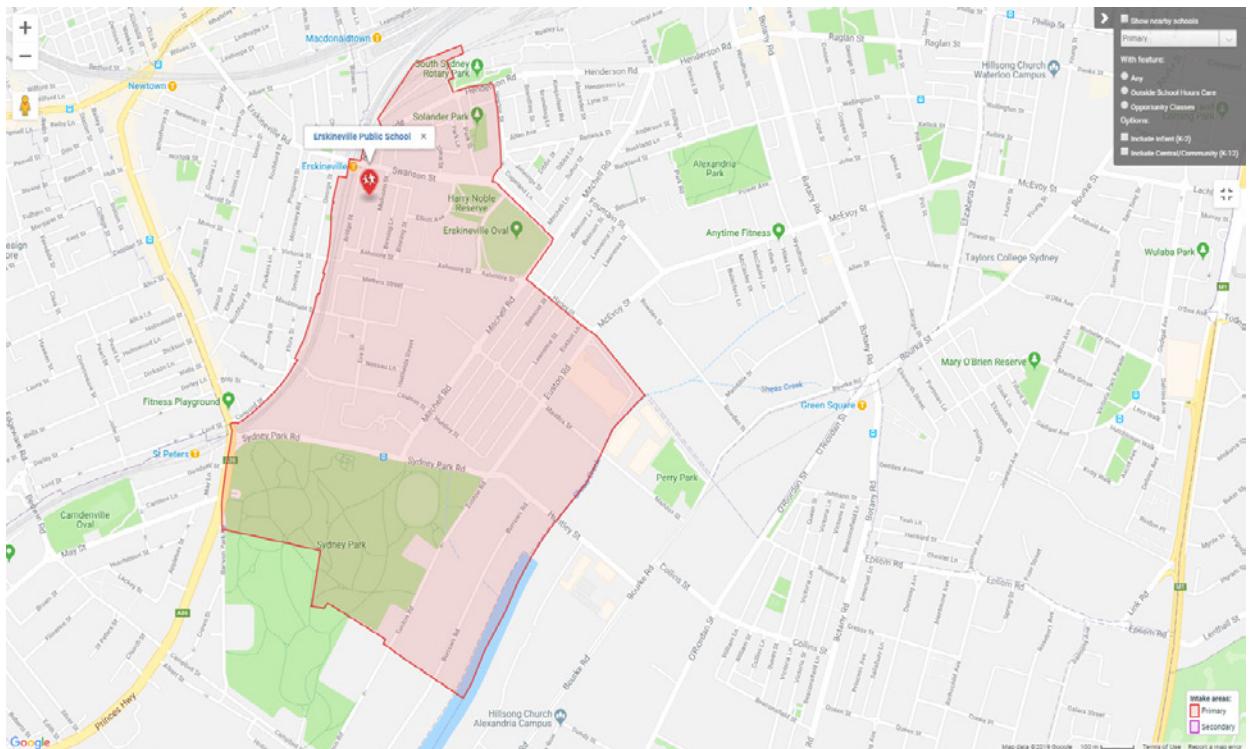
Darlinghurst Public School – the school boundary is split fairly evenly at William Street/New South Head Road between the eastern side of Macleay Street & Woolloomooloo Village and the NE end of Oxford Street Village



Plunkett Street Public School – the school boundary is entirely within the Macleay Street & Woolloomooloo Village



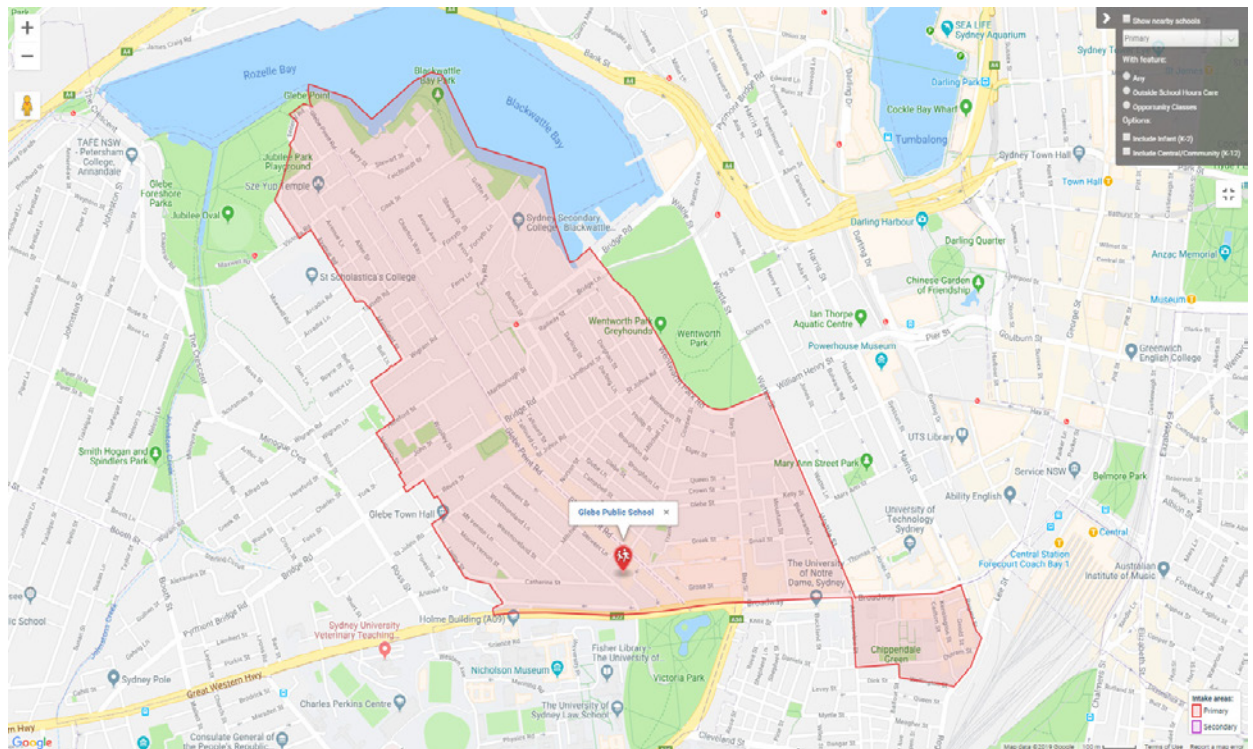
Erskineville Public School – the school boundary crosses Green Square (Euston Road and the canal), King Street and Redfern Street Villages



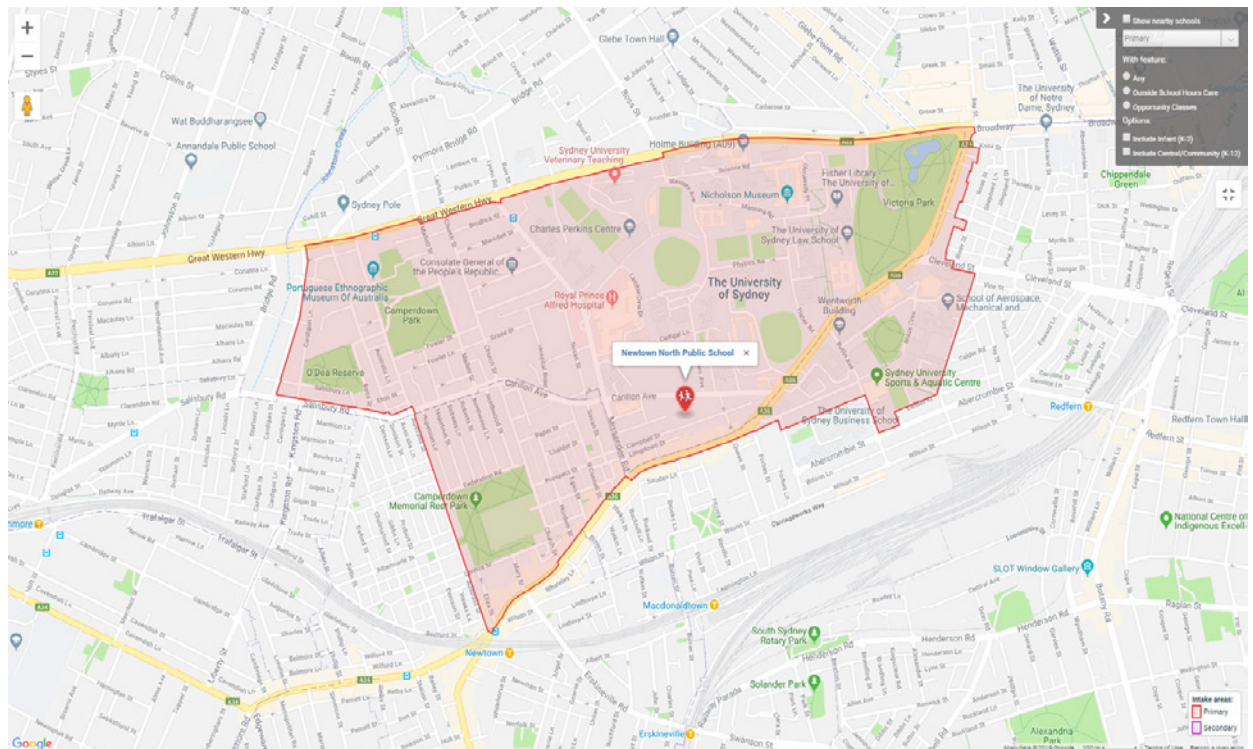
With Forest Lodge Public School – the school boundary lies on the western edge of Glebe Point Road Village, and extends into Inner West LGA



Glebe Public School – the boundary lies mostly within Glebe Point Road Village, except for the bottom rectangle below Broadway which is in Redfern Street Village



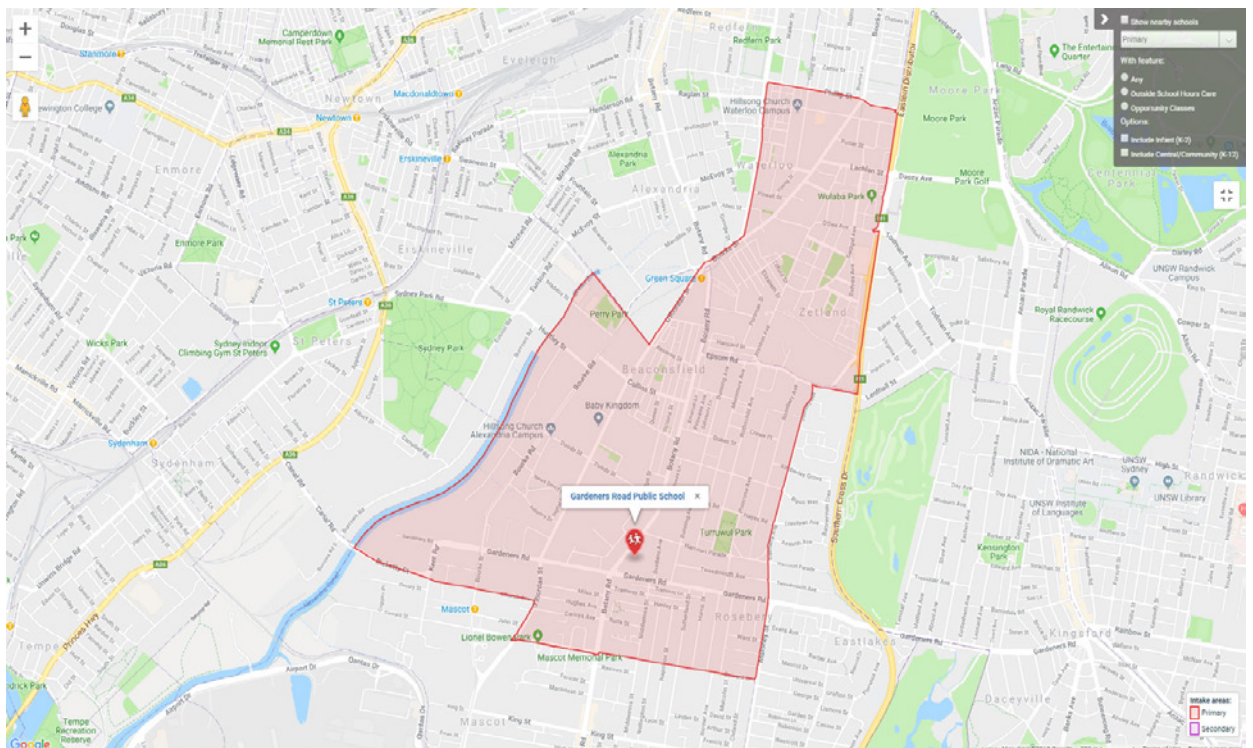
Newtown North Public School – the school boundary lies in King Street and Redfern Street Villages, with a small portion west of Australia Street in the Inner West LGA



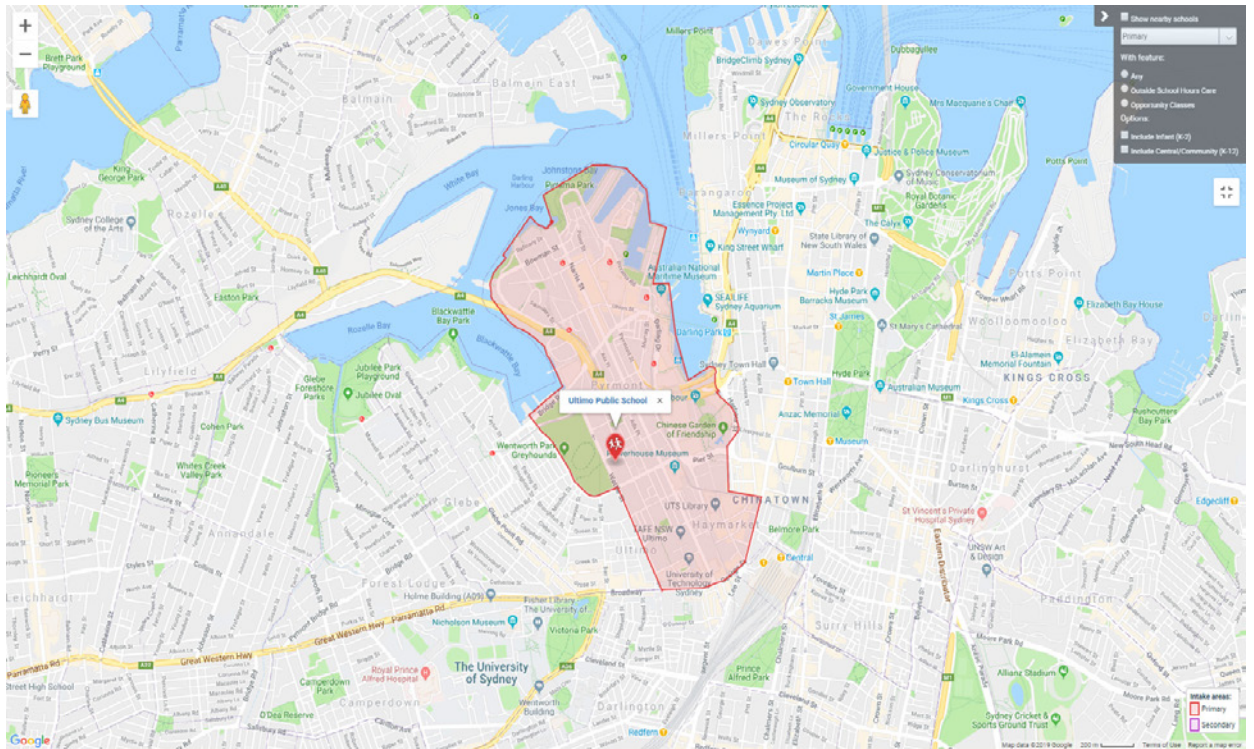
Newtown Public School – the school boundary is within King Street Village, crossing slightly into Redfern Street just north of Erskineville Station, and the western area from Australia Street falling into the Inner West LGA



Gardeners Road Public School – the school boundary lies mostly in Green Square Village, slightly overlapping into Crown & Baptist Streets Village between Danks Street and Phillip Street



Ultimo Public School – the school boundaries are in Harris Street and Chinatown CBD South Villages



Appendix C: Detailed analysis of current and future supply and demand for ECEC and OSHC services

Calculating the number of children of non-resident workers who may use formal child care in the City

The following table shows the number children of non-resident workers, by family composition and by location of residence. This raw data was provided by ABS and shows the number of children aged birth to four and five to 11 years by LGA of residence; where either one parent works in the City of Sydney local area; both parents work in the City of Sydney local area; or if a lone parent household, that parent works in the City of Sydney local area.

The number of children who live outside of metropolitan Sydney have been aggregated under 'Elsewhere in Australia'. These are not included in the analysis, as they are unlikely to come into the City of Sydney local area for child care. There are two rows for totals for the number on children of non-resident workers in metropolitan Sydney; the first includes all children, the second excludes those living in the City of Sydney local area, as they have been analysed in the resident children section:

- the first is for all of metropolitan Sydney
- the second is for metropolitan Sydney without the City of Sydney local area workforce children.

Table 89. Children by parent status; parent/s working in the City of Sydney by LGA, 2016

Children of working population by LGA	Couple family: Both parents worked in Sydney LGA			Couple family: Both parents worked in Sydney LGA			Couple family: Both parents worked in Sydney LGA			Couple family: One parent worked in Sydney LGA			Couple family: One parent worked in Sydney LGA			Couple family: One parent worked in Sydney LGA			Couple family: Total	Couple family: Total	Couple family: Total	Lone parent family: Parent worked in Sydney LGA			Lone parent family: Parent worked in Sydney LGA			Lone parent family: Parent worked in Sydney LGA			Total	Total					
	LGA	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11				Total															
Bayside	667	625	1,297	2,509	2,638	5,146	3,178	3,260	6,441	118	274	393	3,298	3,533																							
Blacktown	382	350	733	3,146	3,644	6,794	3,529	3,999	7,526	66	175	244	3,594	4,175																							
Burwood	103	127	229	414	542	953	519	668	1,188	26	42	65	541	711																							
Camden	67	49	115	652	657	1,309	721	704	1,429	16	28	45	732	730																							
Campbelltown (NSW)	155	120	276	1,356	1,387	2,747	1,508	1,513	3,020	63	91	159	1,576	1,600																							
Canada Bay	476	432	909	1,642	1,721	3,362	2,119	2,149	4,272	52	166	220	2,168	2,320																							
Canterbury-Bankstown	615	626	1,243	3,690	4,188	7,880	4,304	4,818	9,122	163	333	498	4,467	5,149																							
Cumberland	206	211	418	2,126	1,999	4,128	2,333	2,217	4,550	49	97	151	2,386	2,310																							
Fairfield	91	48	144	771	846	1,622	861	902	1,759	45	85	130	914	986																							
Georges River	508	500	1,003	2,256	2,597	4,858	2,770	3,094	5,860	84	176	255	2,849	3,268																							
Hawkesbury	6	13	15	136	216	357	146	227	371	11	10	19	157	241																							
Hornsby	406	434	844	2,275	3,249	5,522	2,683	3,685	6,363	34	138	175	2,722	3,823																							
Hunters Hill	80	119	198	264	413	677	339	530	874	11	17	29	350	549																							
Inner West	1,751	1,569	3,321	4,006	4,442	8,443	5,755	6,010	11,771	170	475	642	5,926	6,489																							
Ku-ring-gai	495	796	1,293	2,035	3,835	5,873	2,531	4,635	7,167	45	154	208	2,579	4,786																							
Lane Cove	299	335	631	867	1,027	1,898	1,167	1,360	2,523	31	64	100	1,204	1,424																							
Liverpool	178	162	341	1,462	1,670	3,133	1,644	1,828	3,475	42	95	140	1,689	1,925																							
Mosman	221	285	508	561	940	1,503	784	1,230	2,014	18	65	77	802	1,287																							
North Sydney	557	362	916	1,464	1,188	2,648	2,014	1,547	3,566	61	161	225	2,074	1,711																							
Northern Beaches	931	1,156	2,089	4,231	6,287	10,515	5,167	7,439	12,607	77	245	318	5,240	7,690																							
Parramatta	523	426	944	3,546	3,224	6,767	4,065	3,654	7,719	80	152	238	4,147	3,809																							
Penrith	73	53	128	1,016	1,188	2,207	1,093	1,244	2,337	35	89	125	1,128	1,332																							

LGA	Couple family: Both parents worked in Sydney LGA			Couple family: One parent worked in Sydney LGA			Couple family: One parent worked in Sydney LGA			Couple family: One parent worked in Sydney LGA			Couple family: Total			Couple family: Total			Couple family: Total			Lone parent family: Parent worked in Sydney LGA			Lone parent family: Parent worked in Sydney LGA			Lone parent family: Parent worked in Sydney LGA			Total		Total	
	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11	Total	0-4	5 11	Total	
Randwick	917	959	1,875	2,615	3,035	5,649	3,530	3,996	7,525	100	298	395	3,630	4,299																				
Ryde	397	372	769	1,927	2,075	4,001	2,328	2,447	4,772	59	131	191	2,383	2,575																				
Strathfield	98	102	200	562	523	1,081	656	622	1,278	22	40	63	684	662																				
Sutherland Shire	740	640	1,381	3,336	4,182	7,520	4,082	4,823	8,904	103	247	351	4,181	5,072																				
Sydney	1,674	1,190	2,867	2,531	1,515	4,039	4,204	2,709	6,910	198	393	596	4,406	3,102																				
The Hills Shire	292	280	573	1,980	2,749	4,728	2,271	3,024	5,295	19	94	118	2,295	3,120																				
Waverley	666	641	1,305	1,565	1,593	3,160	2,233	2,233	4,463	45	168	213	2,276	2,403																				
Willoughby	531	722	1,251	1,773	2,388	4,158	2,306	3,107	5,414	58	146	206	2,360	3,249																				
Woollahra	518	518	1,035	1,067	1,421	2,492	1,584	1,942	3,525	52	137	185	1,635	2,075																				
Metro Sydney	14,631	14,230	28,860	57,796	67,379	125,173	72,424	81,604	154,034	1,964	4,797	6,767	74,392	86,405																				
Metro Sydney (excl CoS)	12,957	13,040	25,993	55,265	65,864	121,134	68,220	78,895	147,124	1,766	4,404	6,171	69,986	83,303																				
Elsewhere in Australia	218	194	408	3,860	4,930	8,792	4,078	5,128	9,200	112	236	348	4,190	5,359																				
Total	14,845	14,424	29,266	61,657	72,306	133,965	76,501	86,729	163,229	2,079	5,033	7,113	78,581	91,759																				

Source: ABS 2016 Census

It has been assumed that not all of these non-resident workers with children would bring their children into the City local area to access child care close to work. The number of children where only one parent of a couple family works in the City of Sydney local area has been halved to allow for these children to go to child care close to home or the other parent's workplace.

The following table includes:

- all non-resident worker children of a couple family where both work in the City
- all non-resident children of a sole parent who works in the City
- half of the children of a couple family where one parent of the family works in the City.

Table 90. Number of non-resident worker children who may access child care close to work

Children of working population by LGA	Total	Total	Total
LGA	0-4	5-11	Total
Bayside (A)	2,040	2,218	4,263
Blacktown (C)	2,021	2,347	4,374
Burwood (A)	336	440	771
Camden (A)	409	406	815
Campbelltown (C) (NSW)	896	905	1,809
Canada Bay (A)	1,349	1,459	2,810
Canterbury-Bankstown (A)	2,623	3,053	5,681
Cumberland (A)	1,318	1,308	2,633
Fairfield (C)	522	556	1,085
Georges River (A)	1,720	1,975	3,687
Hawkesbury (C)	85	131	213
Hornsby (A)	1,578	2,197	3,780
Hunters Hill (A)	223	343	566
Inner West (A)	3,924	4,265	8,185
Ku-ring-gai (A)	1,558	2,868	4,438
Lane Cove (A)	764	913	1,680
Liverpool (C)	951	1,092	2,048
Mosman (A)	520	820	1,337
North Sydney (A)	1,350	1,117	2,465
Northern Beaches (A)	3,124	4,545	7,665
Parramatta (C)	2,376	2,190	4,566
Penrith (C)	616	736	1,357
Randwick (C)	2,325	2,775	5,095
Ryde (C)	1,420	1,541	2,961
Strathfield (A)	401	404	804
Sutherland Shire (A)	2,511	2,978	5,492
Sydney (C)	3,138	2,341	5,483

Children of working population by LGA	Total	Total	Total
LGA	0-4	5 11	Total
The Hills Shire (A)	1,301	1,749	3,055
Waverley (A)	1,494	1,606	3,098
Willoughby (C)	1,476	2,062	3,536
Woollahra (A)	1,104	1,366	2,466
Metro Sydney	45,467	52,698	98,210
Metro Sydney (excl CoS)	42,329	50,357	92,728

Source: ABS 2016 Census

It has been assumed that not all non-resident workers with children aged from birth to 4 years will want to travel into the City with their children to access child care close to work. A distance index has been applied assuming that non-resident workers who live in close proximity to the City are more likely to use child care close to work. The proximity assumptions are that:

- 66.7 per cent of children from local government areas within 10 km of the City are likely to use child care in the City
- 33.3 per cent of children from local government areas within 10 km and 20 km of the City are likely to use child care in the City
- those beyond 20 km will not use child care in the City.

The following table shows these calculations.

Table 91. Non-resident worker children discounted by proximity to the City of Sydney

Children of working population by LGA	Total	Total	Total	Distance centroid to centroid straight line	Distance multiplier (0 10km 100%; 10 20km - 50%; >20km - 0%)	Total with distance factor reduction	Total with distance factor reduction	Total with distance factor reduction
LGA	0-4	5 11	Total	km	Factor	0-4	5 11	Total
Bayside (A)	2,040	2,218	4,263	6.81	0.67	1,360	1,479	2,843
Blacktown (C)	2,021	2,347	4,374	35.39	0.00	0	0	0
Burwood (A)	336	440	771	9.24	0.67	224	293	514
Camden (A)	409	406	815	46.18	0.00	0	0	0
Campbelltown (C) (NSW)	896	905	1,809	39.39	0.00	0	0	0

Children of working population by LGA	Total	Total	Total	Distance centroid to centroid straight line	Distance multiplier (0 10km 100%; 10 20km – 50%; >20km – 0%)	Total with distance factor reduction	Total with distance factor reduction	Total with distance factor reduction
LGA	0-4	5 11	Total	km	Factor	0-4	5 11	Total
Canada Bay (A)	1,349	1,459	2,810	10.24	0.33	449	486	936
Canterbury-Bankstown (A)	2,623	3,053	5,681	15.77	0.33	873	1,017	1,892
Cumberland (A)	1,318	1,308	2,633	24.24	0.00	0	0	0
Fairfield (C)	522	556	1,085	28.56	0.00	0	0	0
Georges River (A)	1,720	1,975	3,687	14.22	0.33	573	658	1,228
Hawkesbury (C)	85	131	213	73.32	0.00	0	0	0
Hornsby (A)	1,578	2,197	3,780	35.57	0.00	0	0	0
Hunters Hill (A)	223	343	566	8.20	0.67	149	228	377
Inner West (A)	3,924	4,265	8,185	4.44	0.67	2,617	2,845	5,459
Ku-ring-gai (A)	1,558	2,868	4,438	17.84	0.33	519	955	1,478
Lane Cove (A)	764	913	1,680	8.39	0.67	509	609	1,121
Liverpool (C)	951	1,092	2,048	36.75	0.00	0	0	0
Mosman (A)	520	820	1,337	7.74	0.67	347	547	891
North Sydney (A)	1,350	1,117	2,465	6.32	0.67	900	745	1,644
Northern Beaches (A)	3,124	4,545	7,665	22.99	0.00	0	0	0
Parramatta (C)	2,376	2,190	4,566	18.91	0.33	791	729	1,520
Penrith (C)	616	736	1,357	46.92	0.00	0	0	0
Randwick (C)	2,325	2,775	5,095	6.96	0.67	1,550	1,851	3,398
Ryde (C)	1,420	1,541	2,961	13.15	0.33	473	513	986
Strathfield (A)	401	404	804	11.71	0.33	134	134	268

Children of working population by LGA	Total	Total	Total	Distance centroid to centroid straight line	Distance multiplier (0 10km 100%; 10 20km – 50%; >20km – 0%)	Total with distance factor reduction	Total with distance factor reduction	Total with distance factor reduction
LGA	0-4	5 11	Total	km	Factor	0-4	5 11	Total
Sutherland Shire (A)	2,511	2,978	5,492	24.14	0.00	0	0	0
Sydney (C)	3,138	2,341	5,483	0.00	1.00	3,138	2,341	5,483
The Hills Shire (A)	1,301	1,749	3,055	40.18	0.00	0	0	0
Waverley (A)	1,494	1,606	3,098	5.69	0.67	996	1,071	2,066
Willoughby (C)	1,476	2,062	3,536	9.81	0.67	984	1,375	2,359
Woollahra (A)	1,104	1,366	2,466	4.78	0.67	736	911	1,645
Metro Sydney	45,467	52,698	98,210			17,323	18,786	36,107
Metro Sydney (excl CoS)	42,329	50,357	92,728			14,185	16,446	30,624

The Source: ABS 2016 Census

Based on these three calculations above there may be:

- 14,185 children aged from birth to 4 years of non-resident workers who may use formal child care in the City.

Non-resident children aged from 5 to 11 years are not included in the current and future demand as most school age children would be attending schools in their home catchment areas, therefore attending OSHC close to home.

The City of Sydney worker forecasts show estimated growth in the workforce in the City of Sydney local area. Since there is no way of knowing the future distribution or number of children of those workers specifically, the growth rate of the workforce has been applied to the number of children by age group and by local area to allow for future demand; that is:

- 2016 to 2018 – 1.8%
- 2016 to 2026 – 19%
- 2016 to 2036 – 40.6%.

These same proportions of growth have been applied to the non-resident worker children aged from birth to 4 years.

- In 2018 there may be 14,445 non-resident worker children who may use formal child care in the city
- In 2026 there may be 16,887 non-resident worker children who may use formal child care in the city
- In 2036 there may be 19,949 non-resident worker children who may use formal child care in the city

We know the total non-resident worker population and how many non-resident workers worked in each Village in 2016 from the 2016 Census. These proportions have been applied to the projected child populations to calculate current and future demand for ECEC and OSHC services in 2018 and 2036. The following section shows these calculations.

Calculating current and future demand for ECEC and OSHC services for non-resident worker children who may use formal child care in the city

Long day care demand

Table 92. Non-resident worker children who may use formal child care in the City

Step 1: Potential pool of non resident worker children who may use formal care in the city.						
Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	7,894	0	9,141	0	10,772	0
Chinatown and CBD South	1,888	0	2,228	0	2,619	0
Crown and Baptist Streets	841	0	943	0	1,099	0
Glebe Point Road	274	0	308	0	358	0
Green Square and City South	749	0	899	0	1,022	0
Harris Street	1,021	0	1,139	0	1,327	0
King Street	443	0	510	0	601	0
Macleay Street and Woolloomooloo	309	0	344	0	394	0
Oxford Street	467	0	537	0	632	0
Redfern Street	560	0	837	0	1,126	0
City of Sydney LGA	14,445	0	16,887	0	19,949	0

Step 2: Not all children use formal child care. ABS data⁶⁴ shows that 43 per cent of children aged from birth to four years and 17 per cent of children aged from five to 11 years use some type of formal child care.

Variables	43.0%	17.0%	43.0%	17.0%	43.0%	17.0%
Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	3,394	0	3,931	0	4,632	0
Chinatown and CBD South	812	0	958	0	1,126	0
Crown and Baptist Streets	362	0	406	0	473	0
Glebe Point Road	118	0	132	0	154	0
Green Square and City South	322	0	387	0	439	0
Harris Street	439	0	490	0	570	0
King Street	191	0	219	0	258	0
Macleay Street and Woolloomooloo	133	0	148	0	169	0
Oxford Street	201	0	231	0	272	0
Redfern Street	241	0	360	0	484	0
City of Sydney LGA	6,212	0	7,261	0	8,578	0

Step 3: From step 2 we know how many children are using may be using formal child care. We need to know what type of formal care these children are using. ABS data shows that 85 per cent of children aged from birth to four years using formal care are using long day care⁶⁵.

Variables	85.0%	0.0%	85.0%	0.0%	85.0%	0.0%
Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	2,885	0	3,341	0	3,937	0
Chinatown and CBD South	690	0	815	0	957	0
Crown and Baptist Streets	307	0	345	0	402	0
Glebe Point Road	100	0	113	0	131	0
Green Square and City South	274	0	329	0	373	0
Harris Street	373	0	416	0	485	0
King Street	162	0	186	0	220	0
Macleay Street and Woolloomooloo	113	0	126	0	144	0
Oxford Street	171	0	196	0	231	0
Redfern Street	205	0	306	0	412	0
City of Sydney LGA	5,280	0	6,172	0	7,291	0

⁶⁴ ABS (2018), *Childhood Education and Care, Australia, June 2017*, Cat. No. 4402DO006_201406, Table 1, Care usually attended by age of child.

⁶⁵ *ibid.*

Step 4: Not all families can access the formal child care they need. ABS data show that eight per cent of families wanted additional days in long day care and/or before and after school care⁶⁶.

Variables	8.0%	0.0%	8.0%	0.0%	8.0%	0.0%
Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	632	0	731	0	862	0
Chinatown and CBD South	151	0	178	0	209	0
Crown and Baptist Streets	67	0	75	0	88	0
Glebe Point Road	22	0	25	0	29	0
Green Square and City South	60	0	72	0	82	0
Harris Street	82	0	91	0	106	0
King Street	35	0	41	0	48	0
Macleay Street and Woolloomooloo	25	0	28	0	32	0
Oxford Street	37	0	43	0	51	0
Redfern Street	45	0	67	0	90	0
City of Sydney LGA	1,156	0	1,351	0	1,596	0

Step 5: We now have totals for the number of children that may use long day care or before and/or after school care in the City and by Village area in 2018 and 2036 (step 3), and the number of children in the same age groups who may require additional long day care or before and/or after school care (step four). These numbers are tallied together to calculate the possible total demand for long day care or before and/or after school care in the City and by Village area in 2018 and 2036.

Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	3,517	0	4,072	0	4,799	0
Chinatown and CBD South	841	0	993	0	1,167	0
Crown and Baptist Streets	375	0	420	0	490	0
Glebe Point Road	122	0	137	0	159	0
Green Square and City South	334	0	400	0	455	0
Harris Street	455	0	508	0	591	0
King Street	197	0	227	0	268	0
Macleay Street and Woolloomooloo	138	0	153	0	175	0
Oxford Street	208	0	239	0	282	0
Redfern Street	249	0	373	0	502	0
City of Sydney LGA	6,435	0	7,523	0	8,887	0

Source: Population and household forecasts, 2016 to 2036, prepared by .id, February 2019; ABS (2018), *Childhood Education and Care, Australia, June 2017*, Cat. No. 4402DO006_201406, Table 1, Care usually attended by age of child and Table 18, Additional formal care

66 ABS (2018), *Childhood Education and Care, Australia, June 2017*, Cat. No. 4402DO006_201406, Table 18, Additional Formal Care.

Table 93. Resident worker children who may use formal child care in the City

Step 1: Potential pool of resident worker children who may use formal care in the city.						
Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	245	138	503	283	583	361
Chinatown and CBD South	688	340	931	448	1,056	520
Crown and Baptist Streets	812	593	943	665	1,015	759
Glebe Point Road	959	860	1,016	975	976	975
Green Square and City South	1,905	1,118	3,179	2,286	3,763	2,908
Harris Street	848	643	848	738	938	806
King Street	1,020	904	1,129	1,022	1,215	1,115
Macleay Street and Woolloomooloo	530	357	528	390	524	385
Oxford Street	601	547	562	546	562	532
Redfern Street	951	674	1,328	1,032	1,578	1,315
City of Sydney LGA	8,559	6,174	10,965	8,384	12,210	9,676
Step 2: Not all children use formal child care. ABS data ⁶⁷ shows that 43 per cent of children aged from birth to four years and 17 per cent of children aged from five to 11 years use some type of formal child care.						
Variables	43.0%	17.0%	43.0%	17.0%	43.0%	17.0%
Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	105	23	216	48	251	61
Chinatown and CBD South	296	58	400	76	454	88
Crown and Baptist Streets	349	101	405	113	436	129
Glebe Point Road	412	146	437	166	420	166
Green Square and City South	819	190	1,367	389	1,618	494
Harris Street	365	109	365	125	403	137
King Street	439	154	485	174	522	190
Macleay Street and Woolloomooloo	228	61	227	66	225	65
Oxford Street	258	93	242	93	242	90
Redfern Street	409	115	571	175	679	224
City of Sydney LGA	3,680	1,050	4,715	1,425	5,250	1,645

⁶⁷ ABS (2018), *Childhood Education and Care, Australia, June 2017*, Cat. No. 4402DO006_201406, Table 1, Care usually attended by age of child.

Step 3: From step 2 we know how many children are using may be using formal child care. We need to know what type of formal care these children are using. ABS data shows that 85 per cent of children aged from birth to four years using formal care are using long day care and seven per cent of children aged from five to 11 years using formal care are using long day care⁶⁸.

Variables	85.0%	7.0%	85.0%	7.0%	85.0%	7.0%
Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	90	2	184	3	213	4
Chinatown and CBD South	251	4	340	5	386	6
Crown and Baptist Streets	297	7	345	8	371	9
Glebe Point Road	351	10	371	12	357	12
Green Square and City South	696	13	1,162	27	1,375	35
Harris Street	310	8	310	9	343	10
King Street	373	11	413	12	444	13
Macleay Street and Woolloomooloo	194	4	193	5	192	5
Oxford Street	220	7	205	6	205	6
Redfern Street	348	8	485	12	577	16
City of Sydney LGA	3,128	73	4,008	100	4,463	115

Step 4: Not all families can access the formal child care they need. ABS data show that eight per cent of families wanted additional days in long day care and/or before and after school care⁶⁹.

Variables	8.0%	0.0%	8.0%	0.0%	8.0%	0.0%
Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	20	0	40	0	47	0
Chinatown and CBD South	55	0	74	0	84	0
Crown and Baptist Streets	65	0	75	0	81	0
Glebe Point Road	77	0	81	0	78	0
Green Square and City South	152	0	254	0	301	0
Harris Street	68	0	68	0	75	0
King Street	82	0	90	0	97	0
Macleay Street and Woolloomooloo	42	0	42	0	42	0
Oxford Street	48	0	45	0	45	0
Redfern Street	76	0	106	0	126	0
City of Sydney LGA	685	0	877	0	977	0

⁶⁸ *ibid.*

⁶⁹ ABS (2018), *Childhood Education and Care, Australia, June 2017*, Cat. No. 4402DO006_201406, Table 18, Additional Formal Care.

Step 5: We now have totals for the number of children that may use long day care or before and/or after school care in the City and by Village area in 2018 and 2036 (step 3), and the number of children in the same age groups who may require additional long day care or before and/or after school care (step four). These numbers are tallied together to calculate the possible total demand for long day care or before and/or after school care in the City and by Village area in 2018 and 2036.

Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	109	2	224	3	260	4
Chinatown and CBD South	307	4	415	5	470	6
Crown and Baptist Streets	362	7	420	8	452	9
Glebe Point Road	427	10	453	12	435	12
Green Square and City South	849	13	1,416	27	1,676	35
Harris Street	378	8	378	9	418	10
King Street	454	11	503	12	541	13
Macleay Street and Woolloomooloo	236	4	235	5	233	5
Oxford Street	268	7	250	6	250	6
Redfern Street	424	8	592	12	703	16
City of Sydney LGA	3,813	73	4,885	100	5,440	115

Source: Population and household forecasts, 2016 to 2036, prepared by .id, February 2019; ABS (2018), *Childhood Education and Care, Australia, June 2017*, Cat. No. 4402DO006_201406, Table 1, Care usually attended by age of child and Table 18, Additional formal care

OSHC day care demand

Table 94. Resident worker children who may use formal child care in the City – OSHC

Step 1: Potential pool of resident worker children who may use formal care in the city.						
Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	245	138	503	283	583	361
Chinatown and CBD South	688	340	931	448	1,056	520
Crown and Baptist Streets	812	593	943	665	1,015	759
Glebe Point Road	959	860	1,016	975	976	975
Green Square and City South	1,905	1,118	3,179	2,286	3,763	2,908
Harris Street	848	643	848	738	938	806
King Street	1,020	904	1,129	1,022	1,215	1,115
Macleay Street and Woolloomooloo	530	357	528	390	524	385
Oxford Street	601	547	562	546	562	532
Redfern Street	951	674	1,328	1,032	1,578	1,315
City of Sydney LGA	8,559	6,174	10,965	8,384	12,210	9,676
Step 2: Not all children use formal child care. ABS data ⁷⁰ shows that 43 per cent of children aged from birth to four years and 17 per cent of children aged from five to 11 years use some type of formal child care.						
Variables	43.0%	17.0%	43.0%	17.0%	43.0%	17.0%
Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	105	23	216	48	251	61
Chinatown and CBD South	296	58	400	76	454	88
Crown and Baptist Streets	349	101	405	113	436	129
Glebe Point Road	412	146	437	166	420	166
Green Square and City South	819	190	1,367	389	1,618	494
Harris Street	365	109	365	125	403	137
King Street	439	154	485	174	522	190
Macleay Street and Woolloomooloo	228	61	227	66	225	65
Oxford Street	258	93	242	93	242	90
Redfern Street	409	115	571	175	679	224
City of Sydney LGA	3,680	1,050	4,715	1,425	5,250	1,645

⁷⁰ ABS (2018), *Childhood Education and Care, Australia, June 2017*, Cat. No. 4402DO006_201406, Table 1, Care usually attended by age of child.

Step 3: From step 2 we know how many children are using may be using formal child care. We need to know what type of formal care these children are using. ABS data shows that 87 per cent of children aged from five to 11 years using formal care are using before and/or after school care⁷¹.

Variables	0.0%	87.0%	0.0%	87.0%	0.0%	87.0%
Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	0	20	0	42	0	53
Chinatown and CBD South	0	50	0	66	0	77
Crown and Baptist Streets	0	88	0	98	0	112
Glebe Point Road	0	127	0	144	0	144
Green Square and City South	0	165	0	338	0	430
Harris Street	0	95	0	109	0	119
King Street	0	134	0	151	0	165
Macleay Street and Woolloomooloo	0	53	0	58	0	57
Oxford Street	0	81	0	81	0	79
Redfern Street	0	100	0	153	0	194
City of Sydney LGA	0	913	0	1,240	0	1,431

Step 4: Not all families can access the formal child care they need. ABS data show that eight per cent of families wanted additional days in long day care and/or before and after school care⁷².

Variables:	0.0%	8.0%	0.0%	8.0%	0.0%	8.0%
Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	0	11	0	23	0	29
Chinatown and CBD South	0	27	0	36	0	42
Crown and Baptist Streets	0	47	0	53	0	61
Glebe Point Road	0	69	0	78	0	78
Green Square and City South	0	89	0	183	0	233
Harris Street	0	51	0	59	0	64
King Street	0	72	0	82	0	89
Macleay Street and Woolloomooloo	0	29	0	31	0	31
Oxford Street	0	44	0	44	0	43
Redfern Street	0	54	0	83	0	105
City of Sydney LGA	0	494	0	671	0	774

⁷¹ *ibid*

⁷² *ABS (2018), Childhood Education and Care, Australia, June 2017, Cat. No. 4402DO006_201406, Table 18, Additional Formal Care*

Step 5: We now have totals for the number of children that may use long day care or before and/or after school care in the City and by Village area in 2018 and 2036 (step 3), and the number of children in the same age groups who may require additional long day care or before and/or after school care (step four). These numbers are tallied together to calculate the possible total demand for long day care or before and/or after school care in the City and by Village area in 2018 and 2036.

Village	2018		2026		2036	
	0-4	5 11	0-4	5 11	0-4	5 11
CBD and Harbour	0	31	0	64	0	82
Chinatown and CBD South	0	77	0	102	0	119
Crown and Baptist Streets	0	135	0	152	0	173
Glebe Point Road	0	196	0	222	0	222
Green Square and City South	0	255	0	521	0	663
Harris Street	0	147	0	168	0	184
King Street	0	206	0	233	0	254
Macleay Street and Woolloomooloo	0	81	0	89	0	88
Oxford Street	0	125	0	124	0	121
Redfern Street	0	154	0	235	0	300
City of Sydney LGA	0	1,407	0	1,911	0	2,205

Source: Population and household forecasts, 2016 to 2036, prepared by .id, February 2019; ABS (2018), *Childhood Education and Care, Australia, June 2017*, Cat. No. 4402DO006_201406, Table 1, Care usually attended by age of child and Table 18, Additional formal care

How many children use each child place

Most children attend formal children's services less than five days per week. This is regardless of parents' workforce participation. As part of this report parents responded to an online survey – *Understanding your child care needs*. Parent respondents who were currently using child care were asked to indicate how many days per week their child attended different types of care. Results from the survey shows that the current ratios of children to one full time child place are:

- 1.53 children per one long day care place and
- 1.481 children per one before and/or after school care place⁷³.

This assumes no dramatic changes to children's services, families' workforce participation and preferred child care use.

73 Parent survey conducted as part of this research – *Understanding your child care needs* (2019).

The following LDC and OSHC tables list and calculate the following.

- First, it tallies the total children of non-resident workers and residents aged from birth to four and five to 11 years discounting proximity to the CBD, preferences for care close to work, type of formal care use, and proportion of families who may require additional days in care in the City.
- Secondly, using this total we calculate the ratio of children per full-time place based on this proportional attendance.
- Then it lists the total number of current child care places for children aged from birth to four years and five to 11 years in the market place (current supply), and the number of child places approved in development applications where construction is underway or still to be completed (DA pipeline from 2026) and tallies these two figures together to get a total of possible existing child care supply.
- Lastly, we calculate total child places less the total number of children to determine potential over or under supply of child places by Village area and the City of Sydney.

Table 95. Long day care – over/under supply of child places

Variable	1.53 The average number of children per long day care place from the <i>Understanding your child care needs</i> Parent Survey 2019		
2018			
Village	Demand		Supply
	Worker	Resident	Current supply DA pipeline
CBD and Harbour	2,296	72	1,632
Chinatown and CBD South	549	203	287
Crown and Baptist Streets	244	241	419
Glebe Point Road	80	286	507
Green Square and City South	218	563	1,753
Harris Street	297	252	583
King Street	129	304	418
Macleay Street and Woolloomooloo	90	157	142
Oxford Street	136	179	288
Redfern Street	163	282	556
City of Sydney LGA	4,201	2,537	6,585

2026				
DA pipeline is added from 2016 and assumes all child places approved will be provided				
Village	Demand		Supply	
	Worker	Resident	Current supply	DA pipeline
CBD and Harbour	2,658	148	1,632	11
Chinatown and CBD South	648	274	287	147
Crown and Baptist Streets	274	279	419	40
Glebe Point Road	90	303	507	244
Green Square and City South	261	942	1,753	254
Harris Street	331	252	583	90
King Street	148	336	418	144
Macleay Street and Woolloomooloo	100	157	142	
Oxford Street	156	168	288	
Redfern Street	243	394	556	420
City of Sydney LGA	4,911	3,254	6,585	1,350
2036				
Village	Demand		Supply	
	Worker	Resident	Current supply	DA pipeline
CBD and Harbour	3,133	172	1,632	11
Chinatown and CBD South	762	311	287	147
Crown and Baptist Streets	320	301	419	40
Glebe Point Road	104	291	507	244
Green Square and City South	297	1,117	1,753	254
Harris Street	386	279	583	90
King Street	175	362	418	144
Macleay Street and Woolloomooloo	115	155	142	
Oxford Street	184	168	288	
Redfern Street	327	469	556	420
City of Sydney LGA	5,801	3,626	6,585	1,350

Please note that DA pipeline figures are not included in the table for OSHC below as all DAs were for places for children aged from birth to four years.

Table 96. Outside school hours care – over/under supply of child places

Variable	1.48 The average number of children per place from the <i>Understanding your child care needs</i> Parent Survey 2019			
2018				
Village	Demand		Places (after school care)	
	Worker	Resident	Total	Total
CBD and Harbour	0	21	21	145
Chinatown and CBD South	0	52	52	0
Crown and Baptist Streets	0	91	91	360
Glebe Point Road	0	132	132	550
Green Square and City South	0	172	172	155
Harris Street	0	99	99	90
King Street	0	139	139	520
Macleay Street and Woolloomooloo	0	55	55	75
Oxford Street	0	84	84	390
Redfern Street	0	103	103	190
City of Sydney LGA	0	948	948	2,475
2026				
Village	Demand		Places (after school care)	
	Worker	Resident	Total	Total
CBD and Harbour	0	43	43	145
Chinatown and CBD South	0	69	69	0
Crown and Baptist Streets	0	102	102	360
Glebe Point Road	0	150	150	550
Green Square and City South	0	351	351	155
Harris Street	0	113	113	90
King Street	0	157	157	520
Macleay Street and Woolloomooloo	0	60	60	75
Oxford Street	0	84	84	390
Redfern Street	0	158	158	190
City of Sydney LGA	0	1,287	1,287	2,475

2036				
Village	Demand		Places (after school care)	
	Worker	Resident	Total	Total
CBD and Harbour	0	55	55	145
Chinatown and CBD South	0	80	80	0
Crown and Baptist Streets	0	117	117	360
Glebe Point Road	0	150	150	550
Green Square and City South	0	447	447	155
Harris Street	0	124	124	90
King Street	0	171	171	520
Macleay Street and Woolloomooloo	0	59	59	75
Oxford Street	0	82	82	390
Redfern Street	0	202	202	190
City of Sydney LGA	0	1,486	1,486	2,475

Appendix D:

Organisations contacted

Australian Children's Education & Care Quality Authority (ACECQA)

All ECEC and OSHC services in the City of Sydney local area

Australian Childcare Alliance

Citi

City of Brisbane

City of Melbourne

City of Sydney

Commonwealth Bank of Australia

Deutsche Bank

Guardian Early Learning

Inner West Council

KU Children's Services

Lendlease

Lifestart Co-operative Ltd

National Centre for Indigenous Excellence

Network of Community Activities

North Sydney Council

NSW Department of Education

Peritus Childcare Sales

Schools contacted in the City of Sydney local area

- Alexandria Park Community School
- Bourke Street Public School

- Crown Street Public School
- Darlinghurst Public School
- Darlington Public School
- Erskineville Public School
- Forest Lodge Public School
- Fort Street Public School
- Gardeners Road Public school
- Glebe Public School
- International Grammar School
- Newtown Public School
- Newtown North Public School
- Our Lady of Mt Carmel Catholic Primary school
- Paddington Public School
- Plunkett Street Public School
- SCEGGS, Darlinghurst
- St Andrews Cathedral College
- St Francis of Assisi Catholic Primary School
- St James Catholic Primary School
- St Mary's Catholic Primary School
- Ultimo Public School

SNAICC

St Vincent de Paul Society LAC

Willoughby Council

Wollongong City Council

Woollahra Council

