



# Eyre Peninsula

Early Education & Care

November 2023

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# Executive Summary

## Purpose

Community Early Learning Australia was engaged by Regional Development Australia to create a comprehensive business case to support Regional Development to advocate for investment in early childhood education and care (childcare) in the Eyre Peninsula, to meet support parent's capacity to work, meet industry needs and to address children's developmental needs.

The Eyre Peninsula is ripe for growth, with over \$28 billion in new investment planned in the next four years and close to 30,000 new jobs coming to the region. The success of this investment depends on capacity to attract a workforce to the region, and to attract families the region needs access to long daycare. Long daycare is also crucial to gender equity, without childcare in many districts mothers cannot work.

This project aligns with directions in the South Australian Royal Commission into Early Childhood Education and Care (ECEC), which recognises the importance of ECEC for all children in the two years before school and additional ECEC for the most vulnerable children. We note within our analysis the possible impact of the scale up to two years of preschool, and 30 hours of kindergarten for vulnerable children on further diminishing local capacity by resulting in the withdrawal of existing occasional care places.

The report is prepared in light of significant Government investment in Cheaper Child Care, the benefits of which will not be realized in the Eyre Peninsula without an investment in long daycare infrastructure. Existing funding mechanisms, the Community Child Care Fund, have not been available to much of the peninsula and are insufficient to fund building costs.

Provision of long daycare, where community managed and culturally safe, also supports Closing the Gap, with several areas of the Eyre Peninsula having large indigenous populations.

We draw upon the to determine optimum levels of access, categorizing areas with one place per three children or less as a desert, and aiming for at least a 0.4 ratio of places to children.

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## Why the number of children requiring long daycare doesn't equate to the number of places

Throughout this document you will see a lower count for places than the number of children requiring long daycare. We have drawn upon the Mitchell Institute's Deserts and Oases Report calculation of 0.4 places per child as being sufficient to eliminate a childcare desert and ensure all children and parents can access long daycare as needed.

Children usually attend long daycare on a part time basis, on average for three days a week. So multiple families occupy one place.

For example a 100 place centre would support 250 children in a community to access long daycare on average 2 days a week each week. Some children will attend more than two days, but this is offset by younger children aged 0-1 who are less likely to attend at all.

Community consultation would confirm the robustness of this approach in each of the regions, as patterns of long daycare access may vary across geographies.

The first part of this document articulates key demographic characteristics across ten areas:

- ▶ Wudinna
- ▶ Streaky Bay
- ▶ Elliston
- ▶ Franklin Harbour
- ▶ Ceduna
- ▶ Port Lincoln
- ▶ Lower Eyre
- ▶ Tumby Bay
- ▶ Whyalla
- ▶ Kimba

The analysis includes excerpts from the community consultation in Kimba which strengthen the case for long daycare and capture insights from locals, and people outside the region who would live in Kimba if childcare was available. This strengthens the case for change, and could be replicated across all regions.

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The second part of this document draws together analysis across the Eyre Peninsula including providing a cost benefit analysis. These summary documents can be shared with stakeholders. The section also provides an advocacy strategy, fact sheet and a series of key messages for briefing different stakeholders.

## A note about data sources

Throughout this document we have relied upon a range of data sources, primarily:

- ▶ ABS Community profiles for parental workforce data
- ▶ Census data, including through ABS Quikstats, for population demographics
- ▶ GapMaps for mapping and population projections
- ▶ ACECQA Snapshots, National Register and Starting Blocks for service provider information
- ▶ AEDC website for child vulnerability data
- ▶ Preschool websites and annual reports for enrolment data
- ▶ Local council websites for community insights
- ▶ RDA insights regarding community development.

The data drawn upon is at the local government level where available, otherwise is drawn from suburb level data or data at the broader SA2 level.

We have utilized public data where available, for example from service websites and annual reports, to determine existing service levels and offerings. Some data, for example vacancies in long daycare, is not readily available for some services.

We have integrated data on new investments to project future labour force requirements, and estimate impacts on the demand for long daycare.

We have relied upon the best data available, and made projections and calculations on this basis. The projections need to be tested in community consultation to ascertain precise community needs.

## Glossary of Terminology

Throughout the document a range of terminology is utilised. Below are a list of the key terms:

**National Quality Framework** - The National Quality Framework (NQF) is Australia's system for regulating early childhood education and care. It provides a national approach to regulation, assessment, and quality improvement. The Australian Children's Education and Care Quality Authority (ACECQA) is an independent national authority that helps administer the NQF.

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**National Quality Standards** - The National Quality Standards set a high national benchmark for early childhood education and care and outside school hours care services in Australia. Regulatory authorities assess services against each of the 7 quality areas and give them an overall rating based on these results.

The ratings are:

<b>Excellent</b>	<ul style="list-style-type: none"> <li>▶ Service promotes exceptional education and care, demonstrates sector leadership and is committed to continually improving.</li> <li>▶ Awarded by ACECQA.</li> <li>▶ Services rated Exceeding National Quality Standard in all quality areas may <a href="#">choose to apply for this rating</a>.</li> </ul>
<b>Exceeding National Quality Standard</b>	<ul style="list-style-type: none"> <li>▶ Service goes beyond the requirements of the National Quality Standard in at least 4 of the 7 quality areas, with at least two of these being quality areas 1, 5, 6, or 7.</li> </ul>
<b>Meeting National Quality Standard</b>	<ul style="list-style-type: none"> <li>▶ Service meets the National Quality Standard.</li> <li>▶ Service provides quality education and care in all 7 quality areas.</li> </ul>
<b>Working Towards National Quality Standard</b>	<ul style="list-style-type: none"> <li>▶ Services provides a safe education and care program.</li> <li>▶ There are 1 or more areas identified for improvement.</li> </ul>
<b>Significant Improvement required</b>	<ul style="list-style-type: none"> <li>▶ Service does not meet 1 of the 7 quality areas or a section of the legislation and there is a significant risk to the safety, health and wellbeing of children.</li> </ul>

**Australian Early Development Census** - The Australian Early Development Census (AEDC) is a national assessment conducted every 3 years to examine how children have developed by the time they start school. The AEDC highlights what is working well and what needs to be improved or developed to support children and families. Children are assessed across five areas, called domains – physical health and wellbeing, social competence, emotional maturity, language and cognitive skills (school-based) and communication skills and general knowledge. Children are assessed as on track, developmentally at risk or developmentally vulnerable in each domain.

**Out of school hours care** – Care provided to children of school age before or after school hours, often including vacation care.

**Ruralcare** – State education department funded daycare

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**SEIFA** - Socio-Economic Indexes for Areas (SEIFA) is a product developed by the ABS that ranks areas in Australia according to relative socio-economic advantage and disadvantage. In this report, the Index of Relative Socio-Economic Disadvantage (IRSD) is used which ranks communities from 1, highly disadvantaged to 10, highly advantaged.

## Key Demographic Findings

The Eyre Peninsula is large and diverse, and includes pockets of advantage and disadvantage, growing and declining communities, and areas of population density and sparseness.

Data on child vulnerability (where available at a robust level) shows most children across the region are more likely to start school behind their peers than across the rest of South Australia, which aligns with evidence about the impact of socio-economic disadvantage and regionality on children's vulnerability. Quality early childhood education, such as long daycare, can support children to start school ready, so investing in long daycare for all children regardless of parent's work status is a good long term investment.

Most councils have high levels of employment overall, but female employment is most likely to be part time and many mothers are out of the labour force. This is especially the case in smaller districts where there is no long daycare available. These are also likely to be the areas with the lowest unemployment. If businesses want to grow they need to attract new employees, and mothers out of the labour force are the one resource in abundance in many smaller districts.

Household income usually falls within \$75,000 and \$85,000, well below the state average of \$94,291. Larger cities including Whyalla, Port Lincoln and Ceduna, have much lower levels of household income and higher unemployment as well as very high levels of child vulnerability. This points to a lower capacity to pay for long daycare, and a lower likelihood that private providers will seek to establish services in the area given that lower fees would need to be levied.

Agriculture is a key source of employment throughout, creating likely seasonal demand for long daycare so larger services may be needed to cope with peak demand periods.

## Key Findings Regarding Childcare Demand and Supply

Five districts, Tumby Bay, Wudinna, Elliston, Franklin Harbour and Kimba do not have a long day care service, whilst Whyalla, Port Lincoln, Lower Eyre and Ceduna require additional quality places to meet existing demand and ensure workforce availability for significant new industry investment.

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Bar Streaky Bay, all of the regional districts across the Eyre Peninsula that were examined have an insufficient supply of childcare services based on the Mitchell Institute's definition of deserts as less than one place per 3 children (0.33), with a national average of 0.38 places per child.

In this report we have used 0.4 as the benchmark ratio, aiming for 0.4 places per child to enable families to work, and capacity for scale up of work in peak seasons given the peaks and troughs of a local economy heavily driven by agriculture.

Some of the regional districts have sufficient population to ensure the viability of childcare services, whilst others have smaller markets that are unlikely to be viable on their own. However, these areas have very low unemployment and will be challenged to meet industry demands without access to labour. Mothers out of the labour force, or working part time, are a key resources across all areas with only a minority of mothers working full time, and up to half of all mothers out of the labour force.

## Key Findings Regarding Childcare Needs

Across the Eyre Peninsula different models of ECEC will be needed to meet community needs. Investment will be needed, by federal government to build infrastructure, and other levels of government to ensure centre sustainability particularly for small centres and ongoing contribution to the regional economy.

Tendering all centres out concurrently would support one provider to operate across the region, pooling resources and management and supporting services in times of crises. It is likely to be a more sustainable management model.

Location	Recommendation	Basis for projection
<b>Wudinna</b>	24 place centre	Places based on 0.4 places per child by current population estimate of 61 children without long daycare
<b>Streaky Bay</b>	No current need. Future need projected	Current estimated population of 129. By 2031 there will be a need for another 5 places not factored into current analysis
<b>Elliston</b>	24 place centre	Places based on 0.4 places per child by current population estimate of 59 children without long daycare
<b>Franklin Harbour</b>	21 place centre	21 places currently needed based on 0.4 places per child by current population estimate of 52 children without long daycare

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<b>Ceduna</b>	21 place centre	Places based on 0.4 places per child by current population of 51 children in excess of current long daycare capacity in community
<b>Port Lincoln</b>	89 place centre	Places based on 0.4 places per child by current population of 222 children in excess of long daycare capacity in community
<b>Lower Eyre</b>	100 place centre	90 places currently needed based on 235 children in excess of current long daycare capacity in community, 100 places recommended to meet imminent industry and projected population growth
<b>Tumby Bay</b>	100 place centre	63 places currently needed, with up to 100 extra needed long term due to Cape Hardy Green Hydrogen. 100 places to fill short-medium term need
<b>Whyalla</b>	200 places needed across 2 centres	173 places needed currently based on current population of 433 children in excess of current long daycare capacity in community. 200 places recommended to meet imminent industry growth with new foreshore hotel development.
<b>Kimba</b>	19 place centre	19 places based on 0.4 places per child by current population of 46 children without long daycare
<b>TOTAL</b>	598 places	~1495 children by 0.4 places per child (a place 2 days a week for every child)

It should be noted that some of these services – particularly those below 50 places, are unlikely to be viable unless they are subsidised to realise the ongoing benefits of parents participating in the workforce.

## Summary of cost and potential benefits

The proposed approach is for the building and registration of 10 long daycare centres. Based on an average cost of \$5.5million per centre including, fit out and registration thus would cost around \$55 million and create 598 places.

The Community Child Care Fund has not been accessible to much of the Eyre Peninsula, and the notional amounts provided in the fund are insufficient to grow infrastructure in regional and remote areas.

The potential benefits of this include supporting around over 1000 parents per annum to work full time, or increase hours. This would result in a direct return on investment of around \$44.1 million per annum in additional income through greater workforce participation of families, with up to an additional \$11.1 million

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per annum of new jobs created in the early childhood sector. In addition around \$6.5 million would be saved through better child development outcomes.

## Next Steps

Community consultation is needed to confirm the data projections contained in this report, and to strengthen the local case for change. Excerpts from the Kimba community consultation have been included in this report, which validate the projected demand and provide insights into how a lack of childcare dissuades families from settling in the region.

The second part of this document articulates a business case regarding the investment needed across the region including the costs and benefits of the investment and includes a proposed advocacy strategy. Part two can be used as a stand alone document for advocacy.

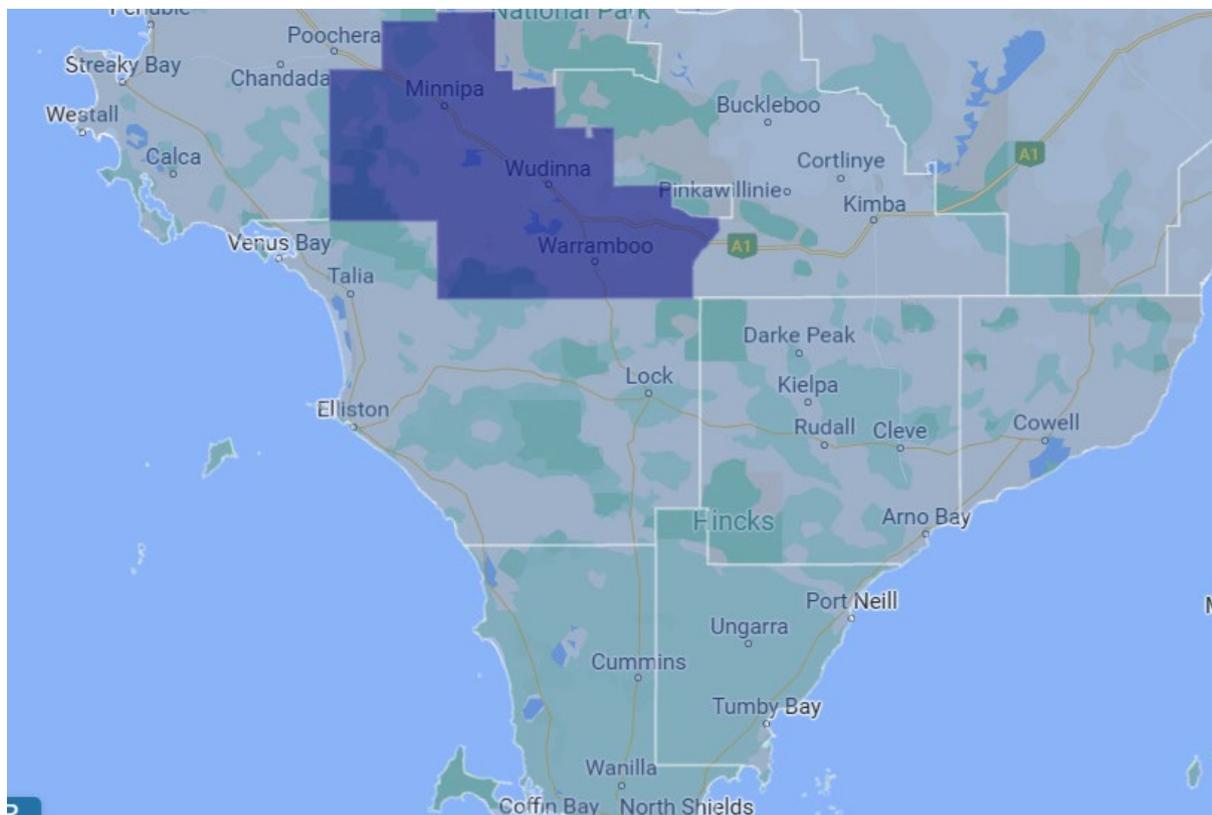
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# Wudinna

## Demographic analysis

NOTE: Data for Wudinna and Elliston is drawn on together where required, as ABS data is most often available at the SA2 level which combines these two district councils.

Wudinna is a large inland regional district of almost 5400 square kilometres. The main suburbs are Minnipa, Wudinna, Kyancutta and Warrambo.



The District's prime source of income is agriculture-related, predominantly cereal cropping. Sheep and beef cattle are also farmed.

Tourism, small business and mining are evolving as potential alternative industries for the area.

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## Population

The population in Wudinna is 1275, and has declined marginally (-1.2%) in the last five years. There are around 61 children aged four or under. Wudinna is marginally younger than on average across South Australia.

	Wudinna	South Australia
<b>0 to 4 years</b>	4%	5%
<b>5 to 17 years</b>	19%	15%
<b>18 to 24 years</b>	5%	8%
<b>25 to 64 years</b>	50	52%
<b>64 to 84 years</b>	17	17%
<b>85 years and over</b>	4%	3%

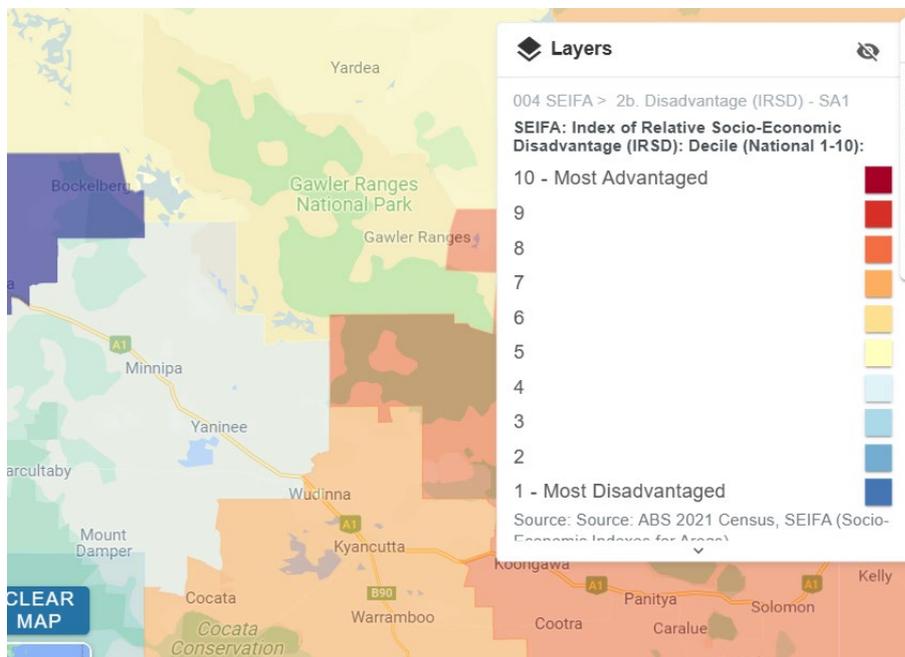
## Income

Income levels in the broader area, encompassing Elliston, are below the national average with a household income of \$87,887 compared to the national average of \$105,794

## SEIFA

The district varies from moderately disadvantaged to advantaged, with Wudinna, Kyancutta and Warramboe being more advantaged (in the seventh decile with ten being most advantaged) than Minnipa which is in the fourth decile.

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## Employment

The broader Le Hunte-Elliston region has a low unemployment rate of 2.9% at the last census, lower than the 5.1% national average. Around two-thirds of employees work in the agricultural, forestry and fishing industry with the remainder in areas including construction, retail, transport and real estate.

A range of infrastructure projects are planned for Wudinna in the medium term that will generate over 50 jobs during construction. A larger infrastructure project, an iron ore mine, planned for the longer term, may generate additional demand beyond that projected in this analysis.

Given the low unemployment in the region, it will be essential for the region to both attract new workers to the region and maximise maternal employment.

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## Maternal Employment

Most females are in the labour force across the region, and are likely to work part time.

Child aged 0-4	Coupled female	Single female parent
Employment worked full time	5	4
Employed worked part time	22	0
Unemployed	0	0
Not in labour force	9	0

## Projected changes to population of children

The numbers of children aged 0 to 5 years across the broader district encompassing Wudinna and Elliston is expected to decline from 161 in 2022 (estimated 100 0-4 year olds) to 136 in 2031. Based on present estimates of 64 children aged four or less in Wudinna, this may decline to around 48 children by 2031.

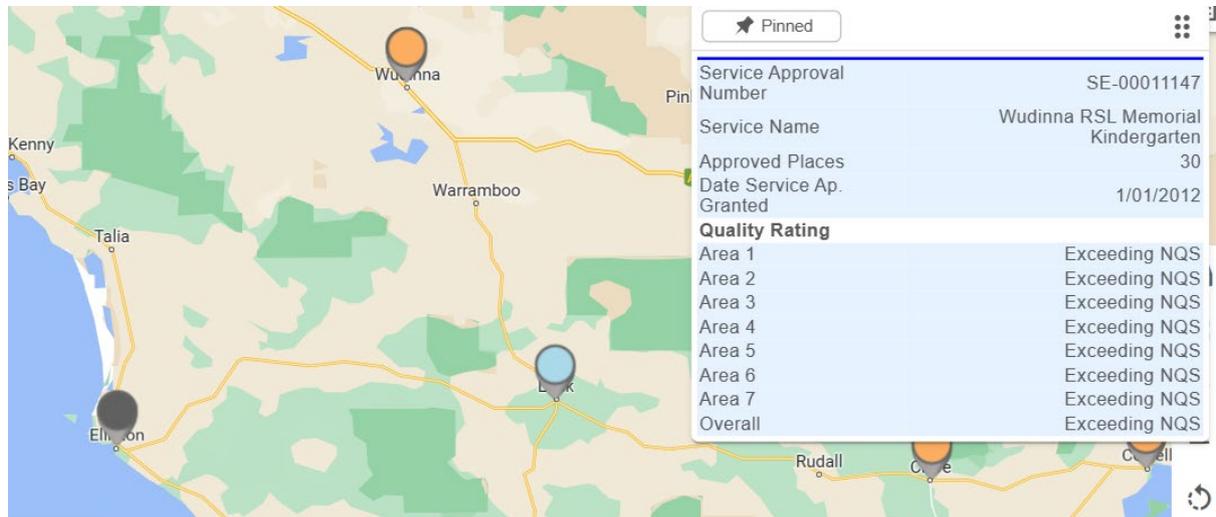
## Children's vulnerability

The Australian Early Development Census is a triennial census which asks teachers of children in their first year of school about each child's development. Aggregated results by community are available for analysis. Results for Wudinna are difficult to rely upon as they are based on few reports, so levels of vulnerability would need to be tested in community consultation.

Geography	Physical 1	Social 1	Emotional 1	Language 1	Communication 1	Vuln 1 1	Vuln 2 1
Australia	9.8	9.6	8.5	7.3	8.4	22.0	11.4
South Australia	10.7	11.2	10.3	7.9	8.6	23.8	12.7
Le Hunte/Elliston and surrounds	3.3	3.3	0.0	0.0	0.0	6.7	0.0

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## Service analysis



There are no long daycare centres in or near, Wudinna with the only providers being the local kindergarten that also offers occasional care on a Thursday morning and a family daycare scheme. Kindergarten enrolments were 15 in term 3 2023.

## Service needs

CELA's review of early childhood services finds that around 61 children are without access to long daycare, with at least an additional 24 long daycare places needed based on ensuring a ratio of 0.4 places per child is met.

## Location

Wudinna benefits from close proximity to local key towns of Minnipa and Warrambo. Given this it is the ideal location for a two room long daycare centre.

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## Population

The population in Streaky Bay is 2264, and has increased marginally (<1%) in the last five years. There are around 129 children aged four or under.

	Streaky Bay	South Australia
<b>0 to 4 years</b>	6%	5%
<b>5 to 17 years</b>	15%	15%
<b>18 to 24 years</b>	4%	8%
<b>25 to 64 years</b>	50%	52%
<b>64 to 84 years</b>	22%	17%
<b>85 years and over</b>	3%	3%

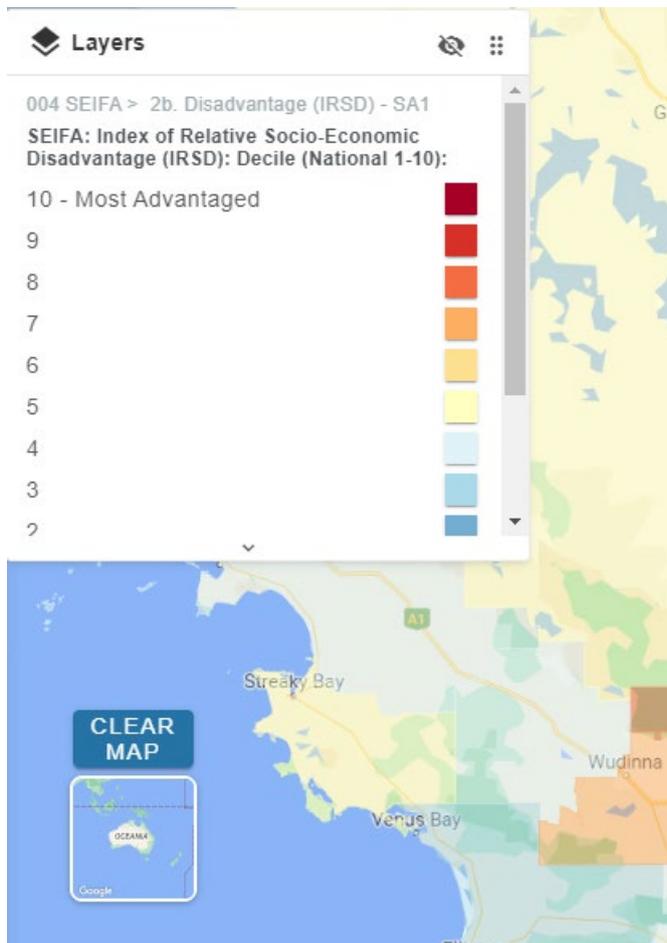
## Income

Income levels in the broader area, encompassing Elliston, are below the national average with a household income of \$73,416 compared to the national average of \$105,794.

## SEIFA

The district is an average level of advantage, with a rating of 5 out of ten, midpoint between most disadvantaged and most advantaged.

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## Employment

The region has a moderate level of unemployment, around 5% at the last census. Around two-thirds of employees work in the agricultural, forestry and fishing industry with the remainder in areas including construction, retail, transport and real estate.

A range of infrastructure projects are projected for Streaky Bay in the short to medium term that may create over 120 short term, and at least 80 ongoing jobs.

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## Maternal Employment

Women with children are likely to work part time, or to not be in the labour force.

Child aged 0-4	Coupled female	Single female parent
<b>Employment worked full time</b>	9	3
<b>Employed worked part time</b>	34	3
<b>Unemployed</b>	0	0
<b>Not in labour force</b>	34	0

## Projected changes to population of children

The numbers of children aged 0 to 5 years across Streaky Bay is growing, and projected to increase from 106 in 2021 to 118 in 2031. Note – this is an undercount as at June 2022 there are an estimated 129 0 to 4 year olds in Streaky Bay. Given this, based on current population growth there will be around 140 children in 2031.

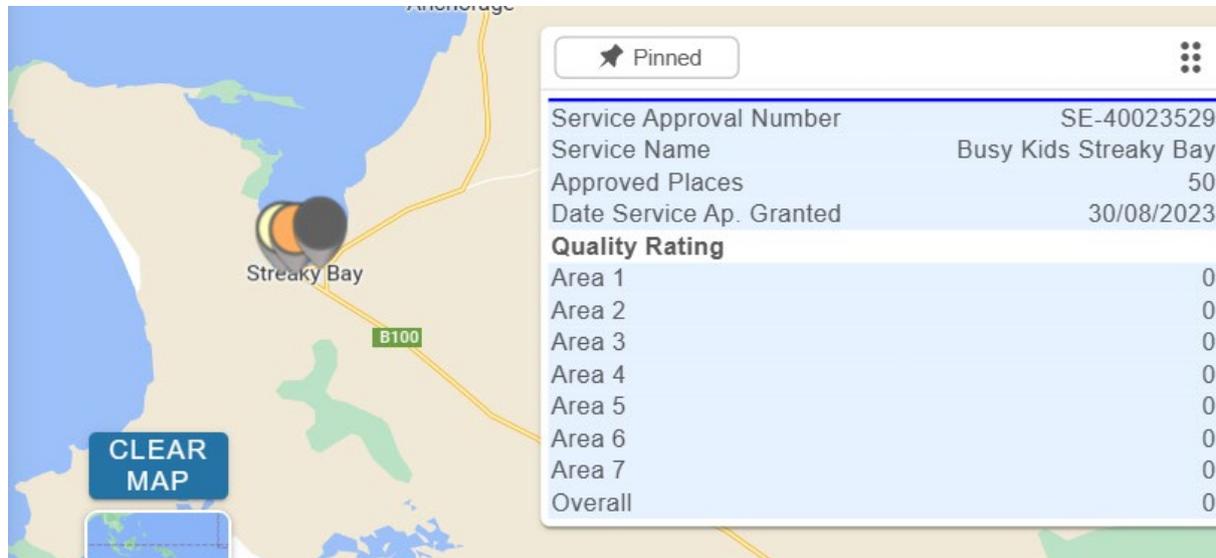
## Children's vulnerability

The Australian Early Development Census is a triennial census which asks teachers of children in their first year of school about each child's development. Aggregated results by community are available for analysis. Results for Streaky Bay show children have around the same level of vulnerability in the area as in South Australia on average, although they are more likely to be vulnerable in more than one area. Results are difficult to rely upon as they are based on few reports, so levels of vulnerability would need to be tested in community consultation.

Geography	Physical 1	Social 1	Emotional 1	Language 1	Communication 1	Vuln 1 1	Vuln 2 1
Australia	28,341 (9.8)	27,788 (9.6)	24,271 (8.5)	21,107 (7.3)	24,064 (8.4)	63,264 (22.0)	32,718 (11.4)
South Australia	2,023 (10.7)	2,125 (11.2)	1,950 (10.3)	1,494 (7.9)	1,622 (8.6)	4,490 (23.8)	2,411 (12.7)
Streaky Bay	3 (10.0)	4 (13.3)	3 (10.0)	2 (6.7)	3 (10.0)	7 (23.3)	5 (16.7)

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## Service analysis



There is one, new long daycare centre with 50 approved places in Streaky Bay. The fees at Busy Kids are \$120 to \$130 per day from 8 to 5:30 pm, which is around the maximum fee cap for Child Care Subsidy at \$13.73.

Additionally there is an out of school hours care program, and a 41 place Children's Centre that provides preschool to four year olds. The Children's Centre offers occasional care at a highly subsidised rate, for three hour sessions across three days a week. This centre has around 17 children enrolled in preschool each term, with around 60 children in occasional care.

## Service needs

CELA's review of early childhood services finds that Streaky Bay may now have sufficient access to childcare with the opening of the new long daycare centre. The new centre will mean Streaky Bay has one childcare place per 2.6 children, a ratio of 0.39 which is outside the definition of a childcare desert and only marginally below the working ratio we are using on 0.4. The centre is large enough to accommodate most children attending two days a week at present.

However, there will be a need for additional services as the population increases, which may exceed the projections due to planned mining industry expansion and likely flow on direct and indirect jobs. One option may be to extend the existing new service if demand exceeds supply.

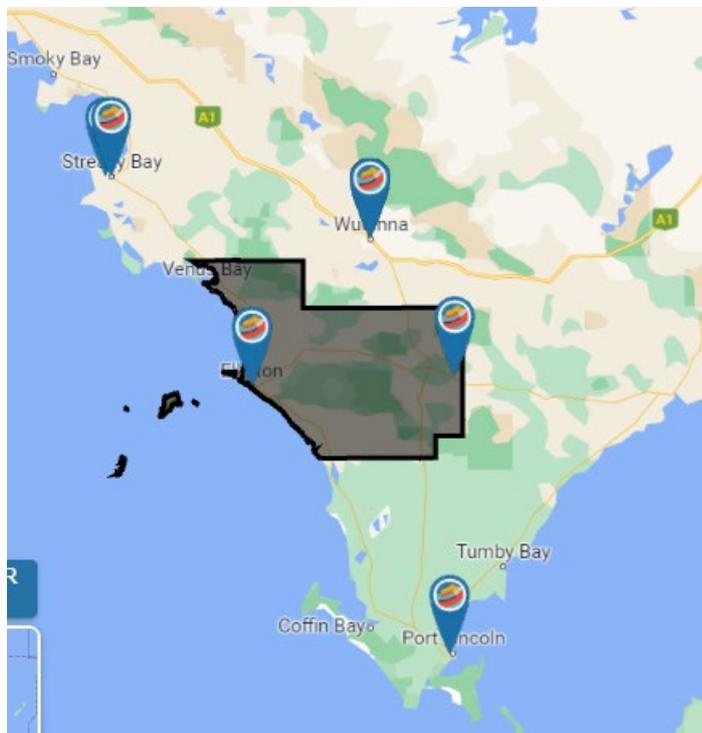
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# Elliston

## Demographic analysis

NOTE: Data for Wudinna and Elliston is drawn on together where required, as ABS data is most often available at the SA2 level which combines these two district councils.

Elliston is a large coastal regional district of almost 6500 square kilometres. The main suburbs are Venus Bay, Elliston, Lock and Sheringa.



The district's prime source of income is agriculture-related, fishing and tourism.

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## Population

The population in Elliston is 1036, and has declined marginally (-5%) in the last five years. There are around 59 children aged four or under.

	Elliston	South Australia
<b>0 to 4 years</b>	6%	5%
<b>5 to 17 years</b>	17%	15%
<b>18 to 24 years</b>	4%	8%
<b>25 to 64 years</b>	53%	52%
<b>64 to 84 years</b>	18%	17%
<b>85 years and over</b>	2%	3%

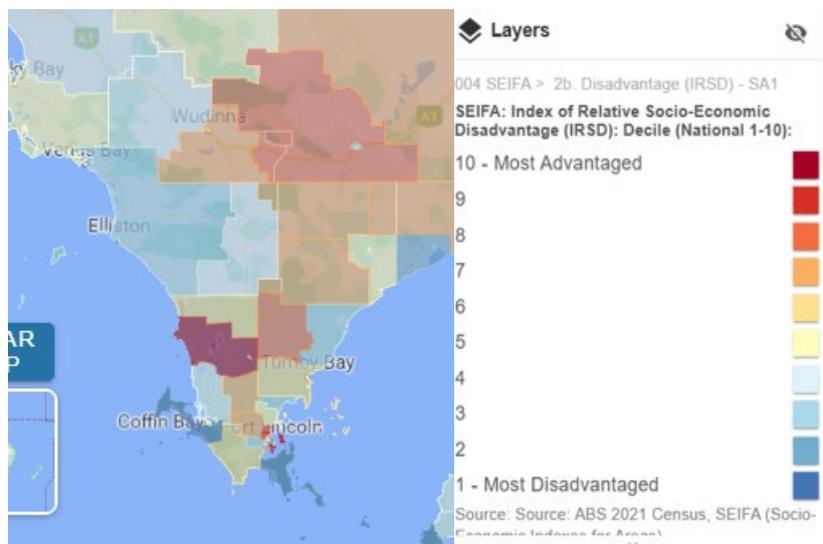
## Income

Income levels in Elliston are well below the national average with a household income of \$76,955 compared to the national average of \$105,794.

## SEIFA

The district is moderately disadvantaged, and is categorised in the fourth decile, with one being most disadvantaged and 10 being least disadvantaged.

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## Employment

The broader Le Hunte-Elliston region had a low unemployment rate of 2.9% at the last census, lower than the 5.1% national average. Around two-thirds of employees work in the agricultural, forestry and fishing industry with the remainder in areas including construction, retail, transport and real estate. There are a variety of longer term infrastructure projects planned that will increase employment marginally.

## Maternal Employment

Mothers of young children are likely to either work part time or are not in employment in Elliston, with full time employment rare, most likely due to the absence of long daycare. This means there is a potential untapped additional labour force if childcare was available.

Child aged 0-4	Coupled female	Single female parent
<b>Employment worked full time</b>	0	4
<b>Employed worked part time</b>	22	0
<b>Unemployed</b>	4	0
<b>Not in labour force</b>	17	0

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## Projected changes to population of children

The numbers of children aged 0 to 5 years across the broader district encompassing Wudinna and Elliston is expected to decline from 161 in 2022 (estimated 100 0-4 year olds) to 136 in 2031. Based on present estimates of 59 children aged four or less, this would decline to around 47 children by 2031.

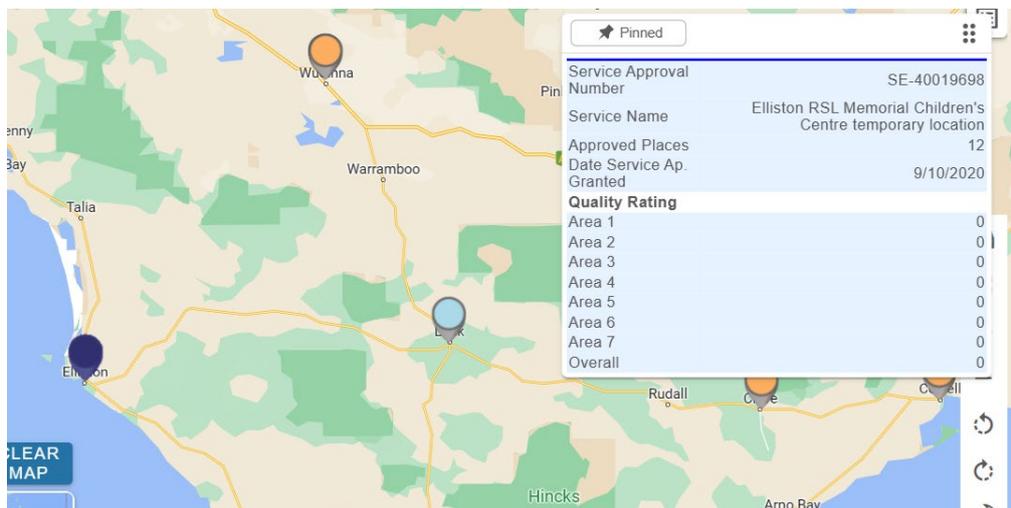
## Children's vulnerability

The Australian Early Development Census is a triennial census which asks teachers of children in their first year of school about each child's development. Aggregated results by community are available for analysis. Results for Elliston are difficult to rely upon as they are based on few reports.

Therefore localised consultation is needed to determine vulnerability.

Geography	Physical	Social	Emotional	Language	Communication	Vuln 1	Vuln 2
Australia	9.8	9.6	8.5	7.3	8.4	22.0	11.4
South Australia	10.7	11.2	10.3	7.9	8.6	23.8	12.7
Le Hunte/Elliston and surrounds	3.3	3.3	0.0	0.0	0.0	6.7	0.0

## Service analysis



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There are no long daycare centres in or near, Elliston with the only providers being the local children's centre in Elliston (12 places) and Lock early learning centre (30 places) which offer preschool. The preschools have significant availability, with both varying between 5 and 10 children enrolled at any stage.

## Service needs

CELA's review of early childhood services finds that around 59 children are without access to long daycare, with around an additional 24 long daycare places needed, with less than this being categorised as a childcare desert.

### Location

A decision needs to be made on the preferred location for a long daycare centre, noting similar numbers of children in Lock and Elliston in kindergarten. Given population demographics Lock may be a better location for a new 24 place centre.

### Service size

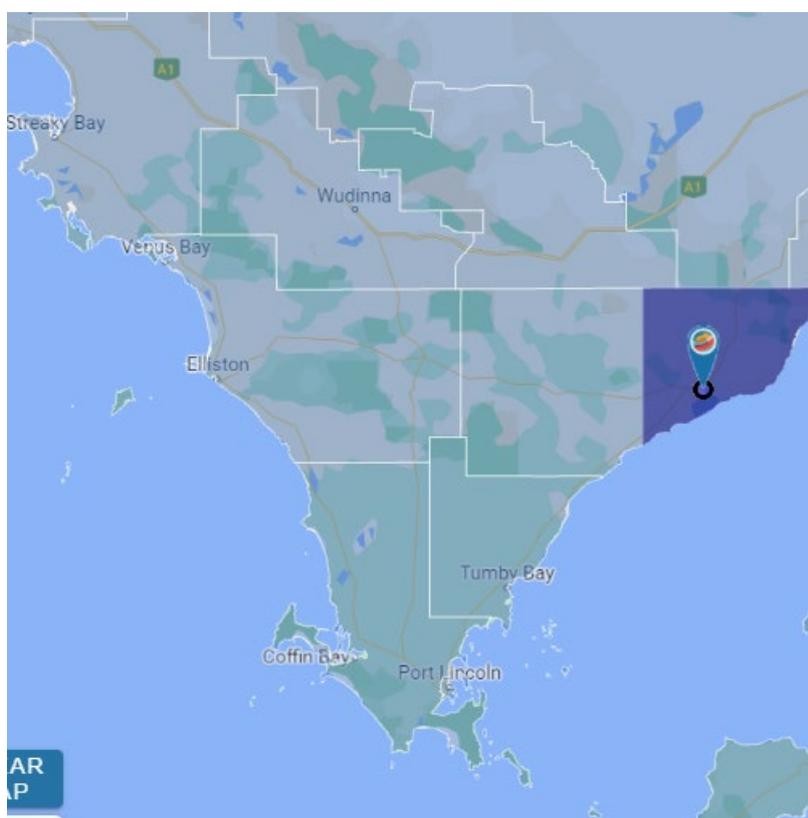
There is a need to accommodate an additional 24 children minima per day in addition to the kindergarten cohort.

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# Franklin Harbour

## Demographic analysis

The District Council of Franklin Harbour is a large coastal district of almost 3300 square kilometres. The main town is Cowell.



The main industries are agricultural including wheat and sheep, supplemented by fishing and oyster farming industries, with tourism emerging as an additional industry.

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## Population

The population in Franklin Harbour is 1315, and remained relatively stable in the last five years. There are around 52 children age four or under.

	Franklin Harbour	South Australia
<b>0 to 4 years</b>	4%	5%
<b>5 to 17 years</b>	13%	15%
<b>18 to 24 years</b>	4%	8%
<b>25 to 64 years</b>	48%	52%
<b>64 to 84 years</b>	28%	17%
<b>85 years and over</b>	2%	3%

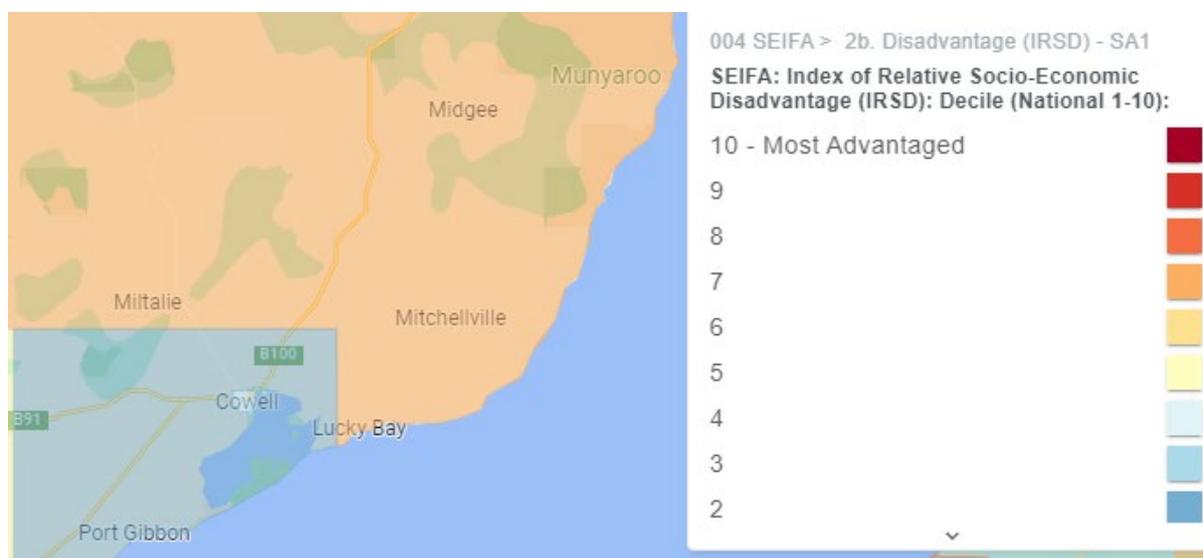
## Income

Income levels are below the national average with a household income of \$77,413 compared to the national average of \$105,794

## SEIFA

The district varies from disadvantaged to advantaged, with Cowell being more disadvantaged (in the second decile with one being most disadvantaged) than Mitchelville and Midgee which are in the seventh decile and moderately advantaged.

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## Employment

The broader Kimba-Cleve-Franklin Harbour region had a low unemployment rate of 2.4% at the last census. Around two-thirds of employees work in the agricultural, forestry and fishing industry with the remainder in areas including construction, retail, transport and real estate.

## Maternal Employment

Mothers of young children are likely to either be in part time employment, or not in the labour force, most likely due to the absence of long daycare.

Child aged 0-4	Coupled female	Single female parent
Employment worked full time	3	0
Employed worked part time	19	0
Unemployed	0	0
Not in labour force	3	4

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## Projected changes to population of children

The numbers of children aged 0 to 5 years across the broader district is expected to decline from 311 in 2022 to 257 in 2031. Based on present estimates of 48 children aged four or less in Franklin Harbour, this would decline to around 40 children by 2031.

## Children’s vulnerability

The Australian Early Development Census is a triennial census which asks teachers of children in their first year of school about each child’s development. Aggregated results by community are available for analysis. Results for Franklin Harbour are difficult to rely upon as they are based on few reports, but indicate vulnerability is around the national average. Levels of vulnerability would need to be tested in community consultation.

Geography	Physical	Social	Emotional	Language	Communication	Vuln 1	Vuln 2
Australia	28,341 (9.8)	27,788 (9.6)	24,271 (8.5)	21,107 (7.3)	24,064 (8.4)	63,264 (22.0)	32,718 (11.4)
South Australia	2,023 (10.7)	2,125 (11.2)	1,950 (10.3)	1,494 (7.9)	1,622 (8.6)	4,490 (23.8)	2,411 (12.7)
Cleve/Franklin Harbour	2 (4.0)	3 (6.0)	0 (0.0)	6 (12.0)	4 (8.0)	9 (18.0)	5 (10.0)

## Service analysis

**Layers**

- 01 Childcare
- 0b\_Facilities - Non LDC
- Overall Rating**

**Service Analysis Pop-up:**

- Service Approval Number: SE-00010281
- Service Name: Cowell Early Childhood Centre
- Approved Places: 30
- Date Service Ap. Granted: 1/01/2012
- Quality Rating**
- Area 1: Exceeding NQS
- Area 2: Exceeding NQS
- Area 3: Exceeding NQS
- Area 4: Exceeding NQS
- Area 5: Exceeding NQS
- Area 6: Exceeding NQS
- Area 7: Exceeding NQS
- Overall: Exceeding NQS

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There are no Child Care Subsidy funded long daycare centres in or near Franklin Harbour. However, the 30 place Cowell Early Childhood Centre offers preschool, a long day care 'rural care' program from 8 to 1 and 1 to 6 and before and after school care. This does not operate in school holidays.

In 2022 it had 14 preschool children and 24 rural care children.

## Service needs

CELA's review of early childhood services finds there is high demand for care given the high utilisation of the ruralcare program. This program supports children to access early education but is insufficient in meeting families employment needs given it does not operate in school holidays.

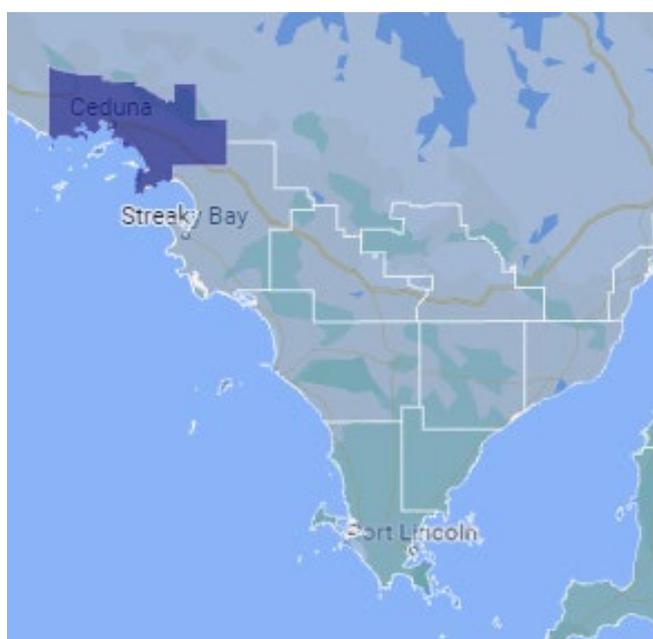
Given the central location of Franklin Harbour to new industry development it will be optimal to build a small, 21 place centre in Cowell.

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# Ceduna

## Demographic analysis

Ceduna is a large coastal regional district of over 5400 square kilometres. The main suburbs are Ceduna, Thevenard, Smoky Bay and Koonibba.



The district's prime source of income is agriculture-related, including aquaculture, as well as Thevenard being a high frequency deep sea port.

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## Population

The population in Ceduna is 3588, and has increased marginally (<1%) in the last five years. There are around 226 children aged four or under. There is a significant Aboriginal and Torres Strait Islander community across Ceduna, including a community of around 860 people centred around Koonibba.

	Ceduna	South Australia
0 to 4 years	6%	5%
5 to 17 years	16%	15%
18 to 24 years	7%	8%
25 to 64 years	52%	52%
64 to 84 years	17%	17%
85 years and over	2%	3%

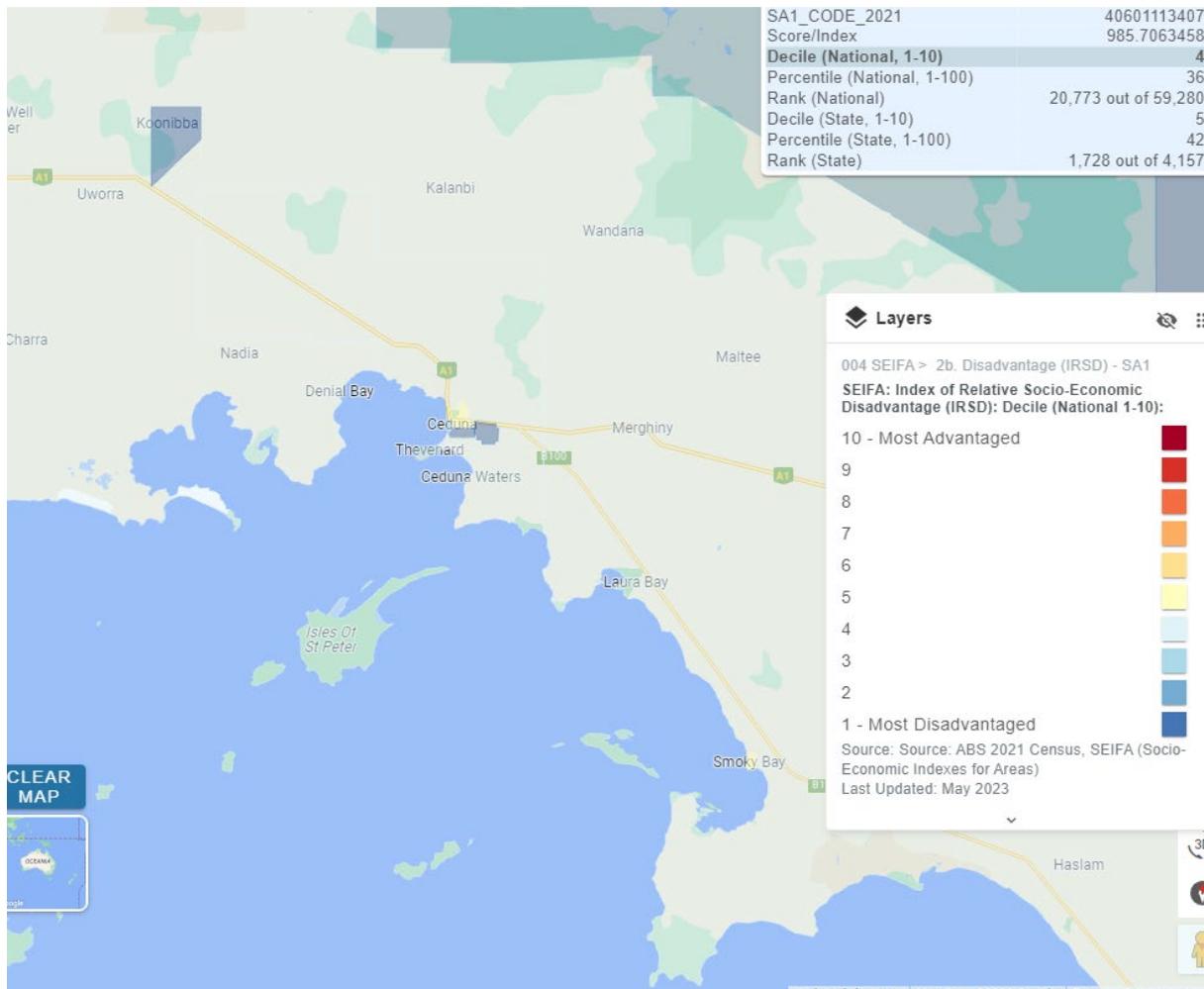
## Income

Income levels are well below the national average with a household income of \$49,546 being under half the national average of \$105,794

## SEIFA

The district varies from moderately disadvantaged to very disadvantaged, with small parts of central Ceduna and Smoky Bay being more advantaged (in the fifth decile with ten being most advantaged) and Koonibba and other parts of Ceduna being in the most disadvantaged decile.

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## Employment

The region had a moderate unemployment rate of 4 % at the last census. Around a third of employees work in the agricultural, forestry and fishing industry with the remainder in areas including construction, retail, accommodation and real estate. Infrastructure investments including in abalone farming, and a new arts centre are likely to drive both short term and ongoing employment, including part time employment for women.

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## Maternal Employment

Most mothers of young children either work part time, or are not in the labour force.

Child aged 0-4	Coupled female	Single female parent
Employment worked full time	35	22
Employed worked part time	73	15
Unemployed	0	3
Not in labour force	40	3

## Projected changes to population of children

The numbers of children aged 0 to 4 years across Ceduna is expected to increase expected to remain relatively stable at around 226 children over the next 8 years.

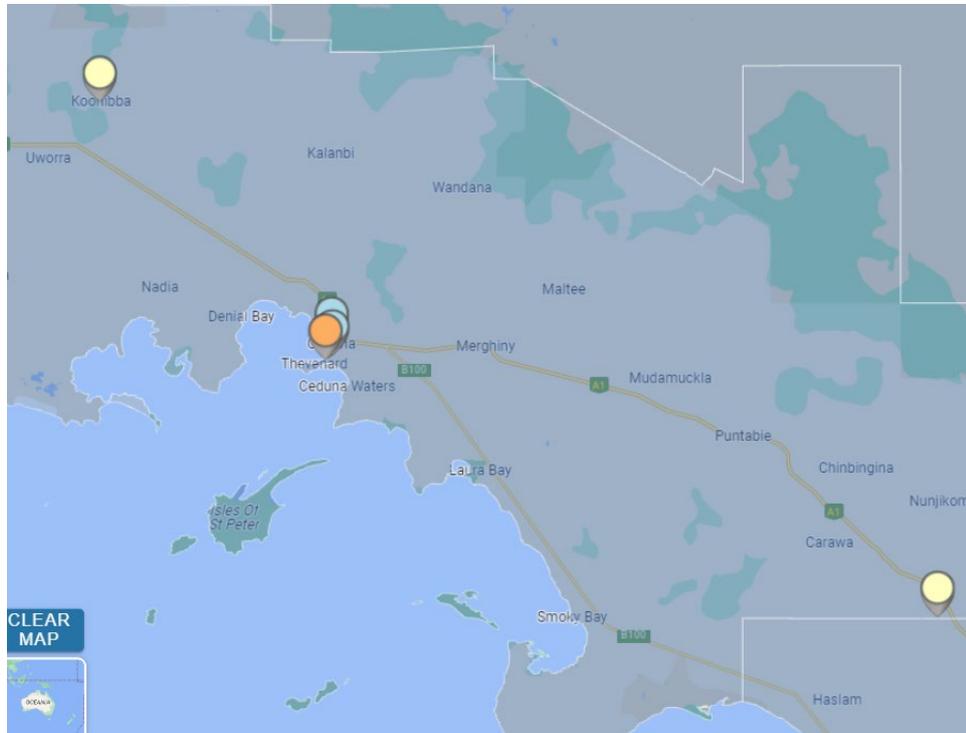
## Children's vulnerability

The Australian Early Development Census is a triennial census which asks teachers of children in their first year of school about each child's development. Aggregated results by community are available for analysis. Ceduna has a high level of vulnerability with nearly forty percent of children starting school behind in one or more areas of development.

Geography	Physical 1	Social 1	Emotional 1	Language 1	Communication 1	Vuln 1 1	Vuln 2 1
Australia	28,341 (9.8)	27,788 (9.6)	24,271 (8.5)	21,107 (7.3)	24,064 (8.4)	63,264 (22.0)	32,718 (11.4)
South Australia	2,023 (10.7)	2,125 (11.2)	1,950 (10.3)	1,494 (7.9)	1,622 (8.6)	4,490 (23.8)	2,411 (12.7)
Ceduna	11 (23.4)	8 (17.0)	9 (19.1)	10 (21.3)	6 (12.8)	19 (40.4)	9 (19.1)

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## Service analysis



There are two long daycare centres offering 70 places in total.

- ▶ Ceduna Community Children’s Centre is a 52 place community operated working towards centre that offers long daycare. Its fees are \$110 per day. Ceduna Out of School Hours Care offers care to children outside of school hours and is co-located at this site.
- ▶ Koonibba Child Care Centre is part of the Multi-functional Aboriginal Children Service run at Koonibba. The maximum number of children that can be cared for at the Child Care Centre at any one time is eighteen: twelve over two years old and six under two years old.

There are two preschools and a child and family centre:

- ▶ an 18 place preschool Miltaburra
- ▶ a 15 place preschool Koonibba. Both are meeting national quality standards although exceeding in several elements.
- ▶ Ngura Yadurirn Children and Family Centre is a 52 place exceeding rated kindergarten in Ceduna that also offers occasional care. In 2022 it has 31 3 year olds and 38 4 year olds

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In addition, Crossways Early Learning Centre is a 28 place working towards three and four year old kindergarten located a Ceduna Crossways Lutheran school.

## Service needs

CELA's review of early childhood services finds that the area is in a childcare desert with marginally less than one long daycare space per three children when considering the two services that offer long daycare.

A new centre with an additional 21 places would provide the community with a level of access similar to other communities and support women to work in areas of industry growth.

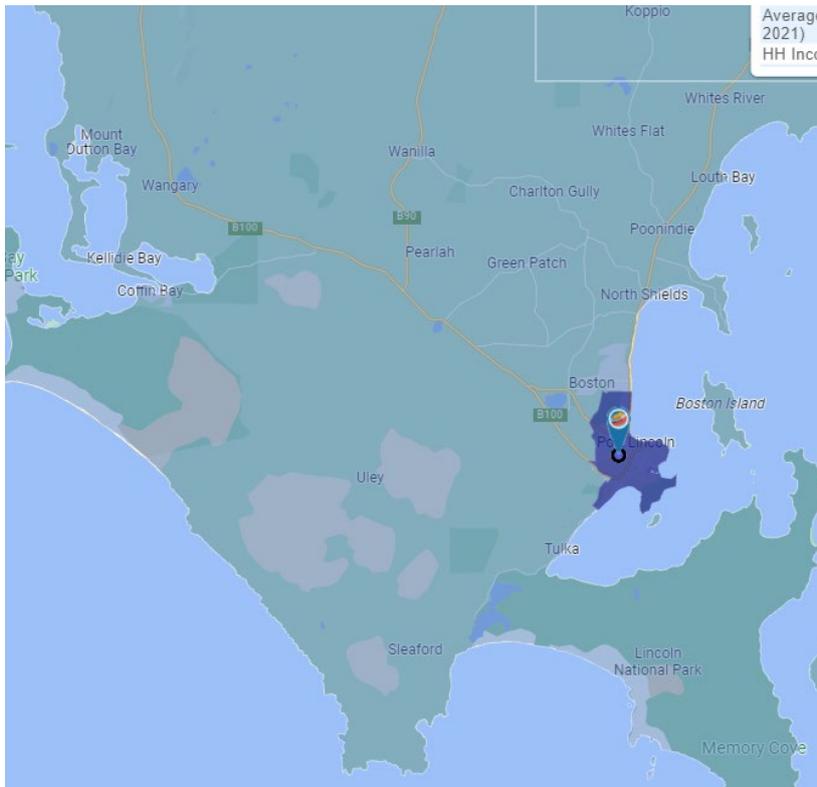
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# Port Lincoln

## Demographic analysis

Port Lincoln is a small, densely populated coastal city which covers 30.4 square kilometres.



The District's prime source of income is agriculture-related, predominantly fishing and grains.

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## Population

The population in Port Lincoln is 14947 and has increased marginally (1%) in the last five years. There are around 837 children aged four or under. Around 3% of the population are Aboriginal or Torres Strait Islander.

	Port Lincoln	South Australia
0 to 4 years	5%	5%
5 to 17 years	16%	15%
18 to 24 years	8%	8%
25 to 64 years	50%	52%
64 to 84 years	18%	17%
85 years and over	3%	3%

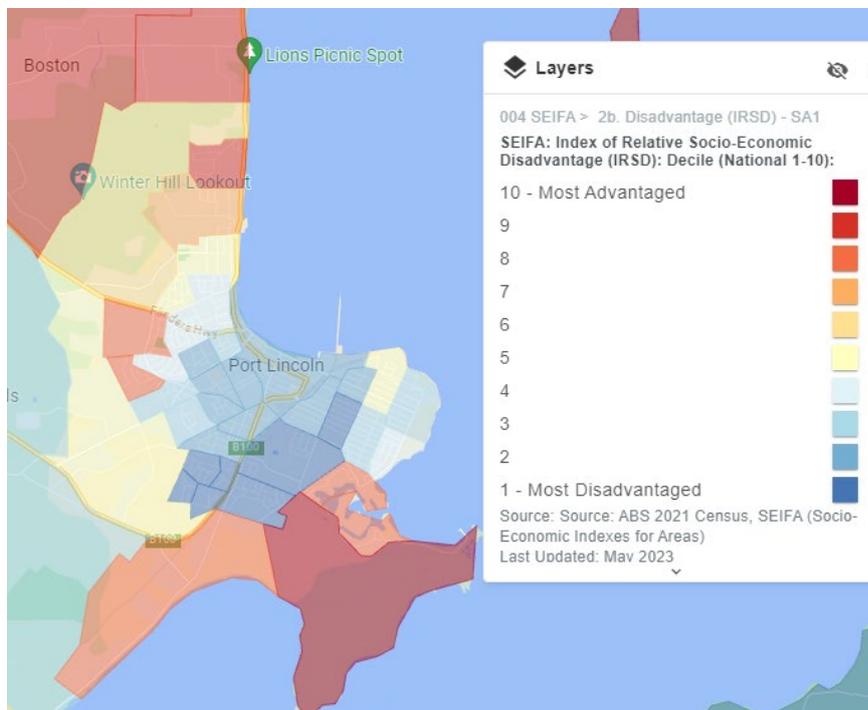
## Income

Income levels in Port Lincoln are well below the national average with a household income of \$47,603 compared to the national average of \$105,794.

## SEIFA

The district varies from very disadvantaged in central Port Lincoln to highly advantaged in some areas.

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## Employment

The region had an unemployment rate of 4.3% at the last census, which is higher than other regions in the Peninsula but below the Australian average of 5.1%. The main industries are agriculture and fishing, construction, rental, retail and hiring and retail trade.

The region is experiencing a significant growth in employment due to increased residential and commercial construction developments creating hundreds of jobs in the next few years, with flow on indirect roles in new communities.

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## Maternal Employment

Most females with young children work part time, although a large number are not in the labour force.

Child aged 0-4	Coupled female	Single female parent
Employment worked full time	59	31
Employed worked part time	256	17
Unemployed	10	8
Not in labour force	146	30

## Projected changes to population of children

The numbers of children aged 0 to 4 years across Port Lincoln is expected to remain relatively stable. However, given the housing developments it is possible more families will be attracted to the area.

## Children's vulnerability

The Australian Early Development Census is a triennial census that asks teachers of children in their first year of school about each child's development. Results for Port Lincoln reveal children have a high level of vulnerability, with over one in four children starting school behind, with levels of vulnerability increasing to one in three in some parts of Port Lincoln.

Region (including local communities)	Vulnerable on one or more domain(s)						Vulnerable on two or more domains					
	2015		2018		2021		2015		2018		2021	
	n	%	n	%	n	%	n	%	n	%	n	%
Australia	62,960	22.0	63,448	21.7	63,264	22.0	31,754	11.1	32,434	11.0	32,718	11.4
SA	4,338	23.5	4,564	23.9	4,490	23.8	2,259	12.2	2,490	13.0	2,411	12.7
Lower Eyre Peninsula	46	23.5	80	35.9	66	28.3	27	13.6	44	19.8	40	17.1
Cummins/Coffin Bay/Wangary/Wanilla	10	28.6	9	28.1	5	22.7	8	22.9	6	18.8	5	22.7
Kirton Point/Lincoln Gardens	15	24.6	23	53.5	19	39.6	7	11.5	11	26.2	14	29.2
Outer Port Lincoln	5	20.8	12	35.3	7	21.2	4	16.7	5	14.7	3	9.1
Port Lincoln Central/Marina	10	18.5	30	32.6	25	25.0	5	9.3	16	17.4	14	14.0
Port Lincoln North/Boston	6	27.3	6	27.3	10	33.3	3	12.5	6	27.3	4	12.9

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## Service analysis



Across Port Lincoln there are 3 long daycare centres offering 214 places in total. These are:

- ▶ Toy Box Community Child Care Centre. Exceeding rated service offering 80 places . Fees are \$125 per day. The centre is fully subscribed.
- ▶ Little Learner Early Education and Care Centre. Working towards centre offering 114 places. Fees are \$94.50 per day. The centre is fully subscribed.
- ▶ TAFE SA Tiny TAFE Child Care Centre. Meeting rated service offering 20 places. Fees are \$111 per day. The centre has vacancies on two days a week.
- ▶ In addition Navigator College is 44 place meeting rated service which offer long daycare to children aged 3-5 years. This is not included in the analysis given children under 3 cannot attend.
- ▶ Port Lincoln Children’s Centre is 32 place centre including long daycare (ruralcare, funded under CCCF), which is rated as exceeding and has a philosophy embracing Aboriginal culture.

Thus all up there are around 246 long daycare/rural care places available.

In addition to the above two, there are four other early learning centres or preschools for children aged 4:

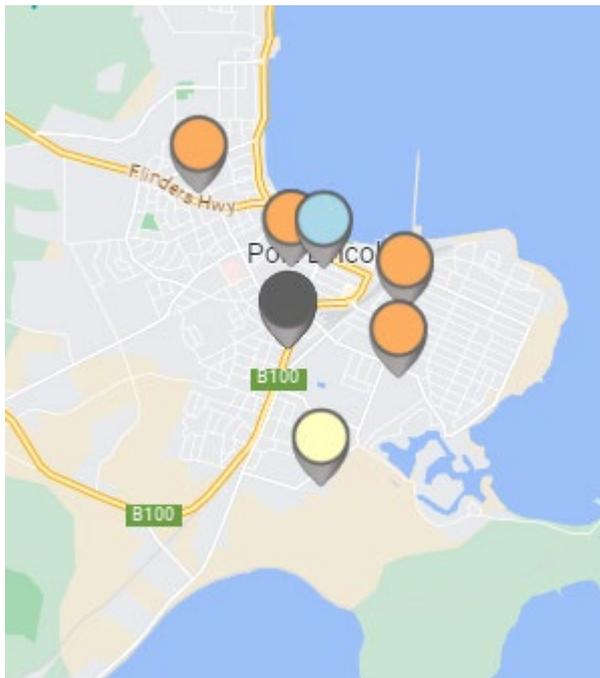
- ▶ Bishop Kindergarten (30 places, exceeding, 61 enrolments)

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- ▶ Park Terrace Kindergarten (44 places, exceeding, 58 enrolments)
- ▶ Kirton Point Children’s Centre (50 places, exceeding, 50 enrolments)
- ▶ St Joseph’s Preschool (a new 38 place preschool)

and one family day care service that is working towards the National Quality Standards.

There is high demand for preschool with each preschool offering multiple group sessions.



## Service needs

CELA’s review finds that there is less than one childcare place per three children. To meet the needs of a projected 222 children without access increase to a ratio of 0.4 an additional 89 places would be needed.

## Location

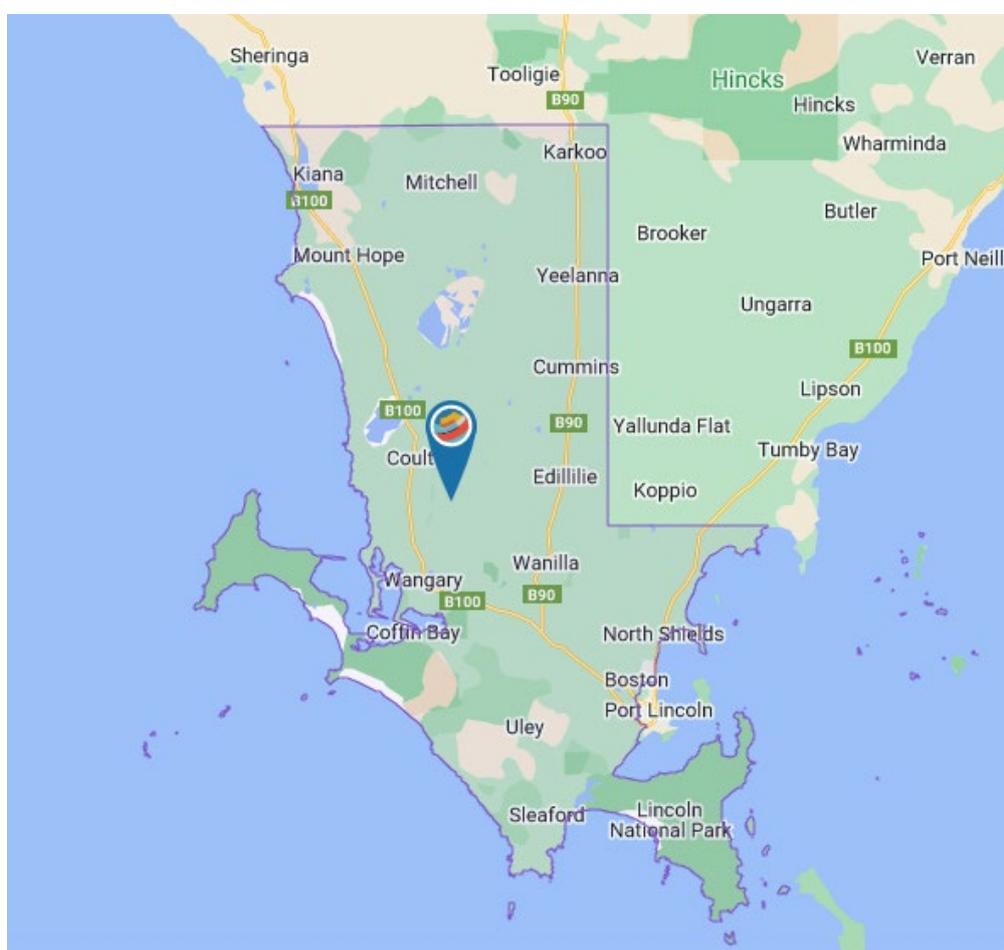
One option is to build a three room, 89 place centre in a central location, with community consultation to indicate if there is a need for a centre in the east of Port Lincoln potentially near the Lincoln Lakes development.

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# Lower Eyre

## Demographic analysis

Lower Eyre is a large coastal regional district of 4715 square kilometres. The main suburbs include Cummins and Coffin Bay.



Key industries include agriculture and aquaculture, fishing and tourism.

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## Population

The population in Lower Eyre is 6100, and increased by 7% in the last five years. There are around 335 children aged four or under.

	Lower Eyre	South Australia
0 to 4 years	6%	5%
5 to 17 years	17%	15%
18 to 24 years	6%	8%
25 to 64 years	53%	52%
64 to 84 years	18%	17%
85 years and over	1%	3%

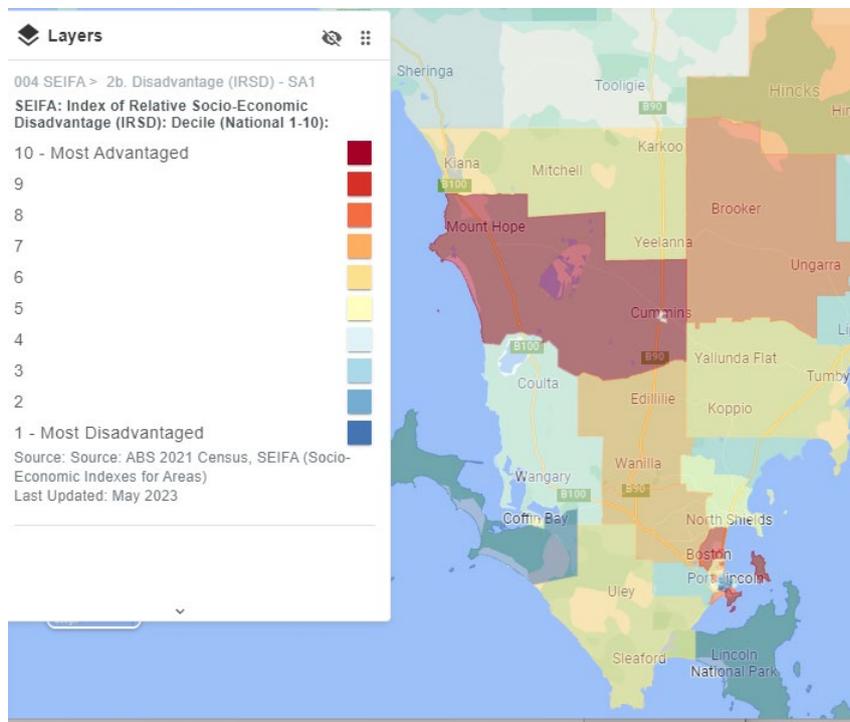
## Income

Income levels in Lower Eyre are higher than across much of the Eyre Peninsula but are below the national average with a household income of \$94,855 compared to the national average of \$105,794

## SEIFA

The district varies from moderately disadvantaged to highly advantaged, with Cummins and Boston being more advantaged and other areas near Port Lincoln and Wangary being moderately disadvantaged.

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## Employment

The region has a low unemployment rate, 2.4% at the last census. Across the larger region encompassing Tumby Bay, half of all employees work in the agricultural, forestry and fishing industry with the remainder in areas including construction, retail, transport and real estate.

Lower Eyre Peninsula is projected to attract significant levels of investment in mining and other industries, which would result in the creation of hundreds of jobs in the construction phase and ongoing. Provision of childcare will be essential to attract a workforce, and to ensure the existing workforce can scale up.

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## Maternal Employment

Most females with children aged under four are in the labour force, but a significant number are not.

Child aged 0-4	Coupled female	Single female parent
Employment worked full time	33	9
Employed worked part time	115	6
Unemployed	4	0
Not in labour force	90	3

## Projected changes to population of children

The district is estimated to grow by around 10 percent to 2031, meaning around an additional 33 children aged 0 to 4.

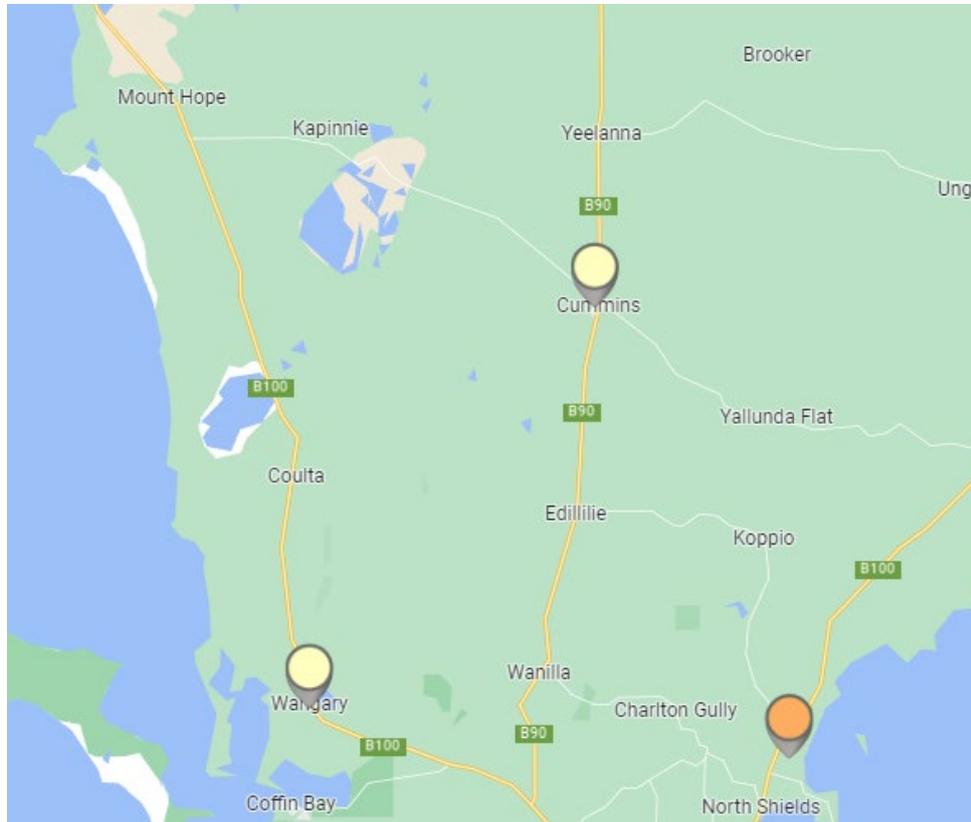
## Children's vulnerability

The Australian Early Development Census is a triennial census which asks teachers of children in their first year of school about each child's development. Across the Lower Eyre region between one in three and one in four children are starting school behind their peers.

Region (including local communities)	Vulnerable on one or more domain(s)						Vulnerable on two or more domains					
	2015		2018		2021		2015		2018		2021	
	n	%	n	%	n	%	n	%	n	%	n	%
Australia	62,960	22.0	63,448	21.7	63,264	22.0	31,754	11.1	32,434	11.0	32,718	11.4
SA	4,338	23.5	4,564	23.9	4,490	23.8	2,259	12.2	2,490	13.0	2,411	12.7
Lower Eyre Peninsula	46	23.5	80	35.9	66	28.3	27	13.6	44	19.8	40	17.1
Cummins/Coffin Bay/Wangary/Wanilla	10	28.6	9	28.1	5	22.7	8	22.9	6	18.8	5	22.7
Kirton Point/Lincoln Gardens	15	24.6	23	53.5	19	39.6	7	11.5	11	26.2	14	29.2
Outer Port Lincoln	5	20.8	12	35.3	7	21.2	4	16.7	5	14.7	3	9.1
Port Lincoln Central/Marina	10	18.5	30	32.6	25	25.0	5	9.3	16	17.4	14	14.0
Port Lincoln North/Boston	6	27.3	6	27.3	10	33.3	3	12.5	6	27.3	4	12.9

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## Service analysis



Across Lower Eyre there is one long daycare centre and two preschools:

- ▶ Cummins Child Parent Centre is a 44 place centre that offers long daycare and preschool. It is rated meeting the NQS. Its fees are \$92 per day.
- ▶ Poonindie Early Childhood Centre is a 30 place centre (17 enrolments in 2022) that is rated as excellent and offers four year old preschool.
- ▶ Lake Wangary Preschool is a 22 place (10 enrolments in 2022) preschool rated as meeting the NQS.

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## Service needs

CELA's review of early childhood services finds that around 225 children are without access to long daycare with around 90 places needed, rising to around 100 as the population increases.

## Location and size

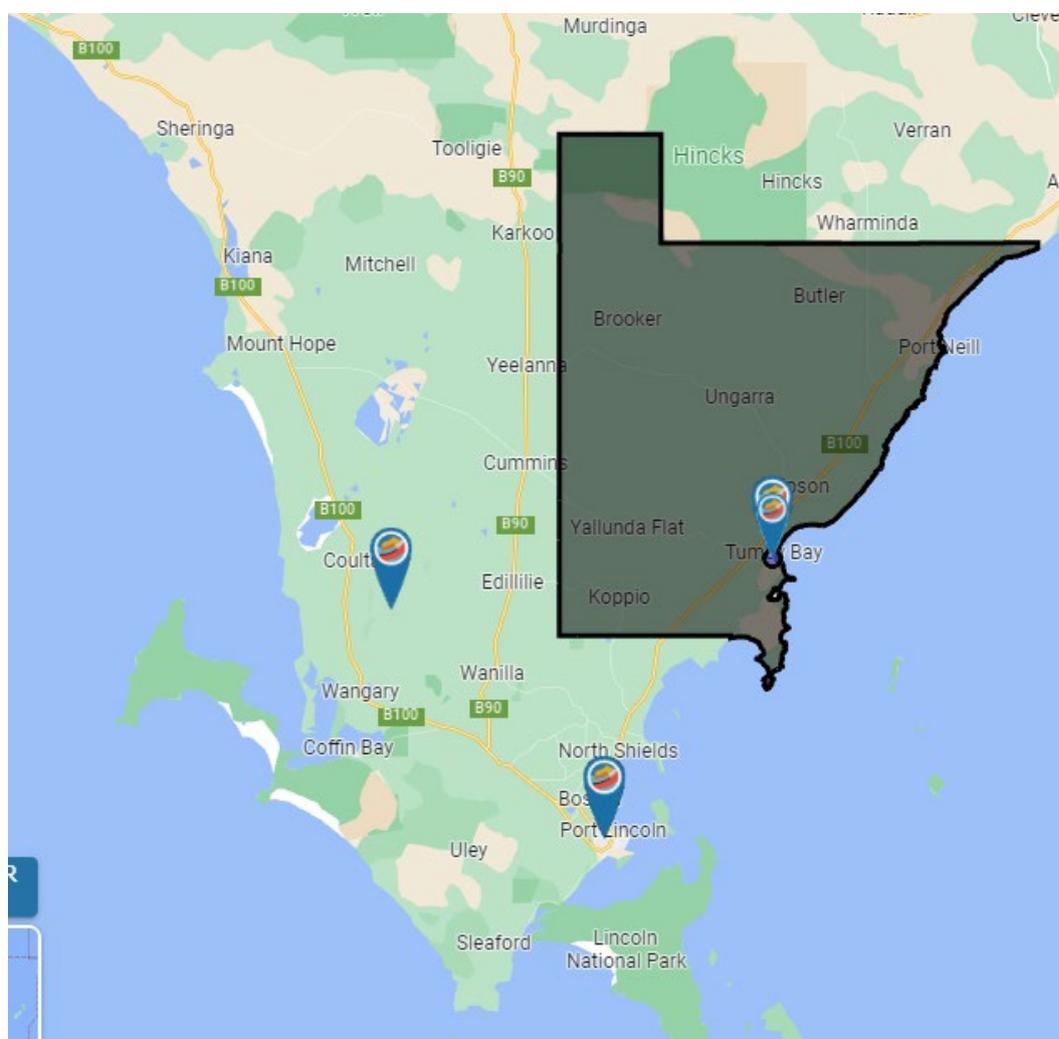
Distance is a key consideration in Lower Eyre with a dispersion of communities. A large centre would ideally be placed in Cummins to provide access to the broad district. Subject to industry development, a second centre may be required closer to Coffin Bay.

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# Tumby Bay

## Demographic analysis

Tumby Bay is a large coastal regional district of almost 2700 square kilometres. The main town is Tumby Bay, with other towns being Port Neill, Ungarra and Lipson.



The District's prime source of income is agriculture-related, construction and real estate and rental.

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## Population

The population in Tumby Bay is 2889 and has increased marginally (1.3%) in the last five years. There are around 154 children aged four or under.

	Tumby Bay	South Australia
0 to 4 years	5%	5%
5 to 17 years	14%	15%
18 to 24 years	3%	8%
25 to 64 years	47%	52%
64 to 84 years	27%	17%
85 years and over	4%	3%

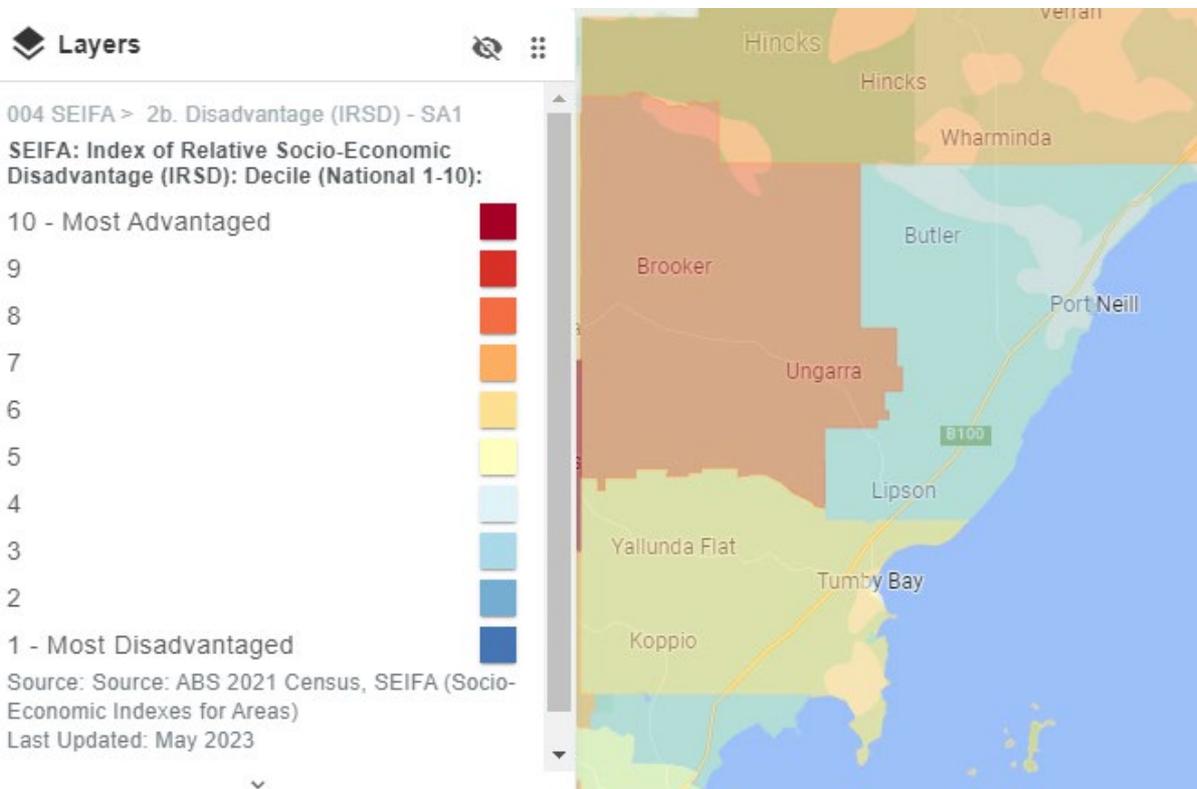
## Income

Income levels in the region are well below the national average with a household income of \$76,266 compared to the national average of \$105,794

## SEIFA

The district varies from moderately disadvantaged in Port Nell to advantaged in Brooker.

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## Employment

The region has a low unemployment rate of 3% at the last census. Across the larger region encompassing Tumby Bay, half of all employees work in the agricultural, forestry and fishing industry with the remainder in areas including construction, retail, transport and real estate. Tumby Bay is facing a large expansion with the funding of a green energy program creating thousands of short term jobs, and hundreds of ongoing roles, in addition to a range of mining investments likely to increase employment.

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## Maternal Employment

Most females with children aged under four are in the labour force, but a significant number are not. Most mothers work part time.

Child aged 0-4	Coupled female	Single female parent
Employment worked full time	13	23
Employed worked part time	66	33
Unemployed	0	0
Not in labour force	41	13

## Projected changes to population of children

The projected population is expected to increase marginally over the next five years, with a projected population of 156 children aged 0 to 4 in 2031. Note: this does not take into account the massive industry growth which will see the population increase three fold during construction phases, and around 15% overall. Given this the number of places needed for long daycare may be high in the short term, and could remain high depending on future industry attraction.

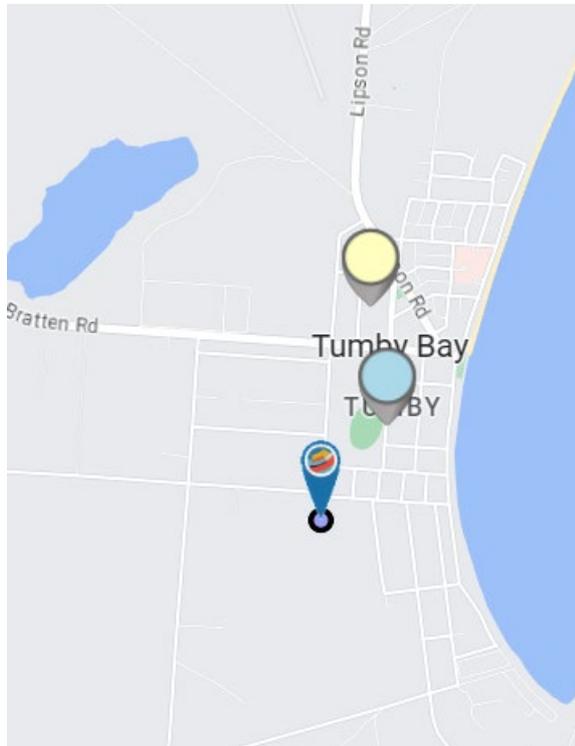
## Children's vulnerability

The Australian Early Development Census is a triennial census that asks teachers of children in their first year of school about each child's development. Aggregated results by community are available for analysis. Results for Tumbly Bay are difficult to rely upon as they are based on few reports, and need to be tested in community consultation.

	2009		2012		2015		2018		2021		Signif 2009 vs 2021
	n	%	n	%	n	%	n	%	n	%	
Vulnerable on one or more domain(s)	2	11.8	5	17.2	3	10.7	8	24.2	1	3.6	No change
Vulnerable on two or more domains	0	0.0	2	6.9	2	7.1	5	15.2	0	0.0	No change

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## Service analysis



Tumby Bay has:

- ▶ a 45 place kindergarten that is rated as Working Towards, the kindergarten offers Ruralcare 5 days a week (up to 19 children) and 19 children are enrolled in kindergarten.
- ▶ and an out of school hours care program.

## Service needs

CELA's review of early childhood services finds that around 156 children are without access to long daycare, with around an additional 63 long daycare places needed immediately. Given the imminent industry expansion, a large long daycare centre should be built that can accommodate 100 children when at full capacity.

### Location

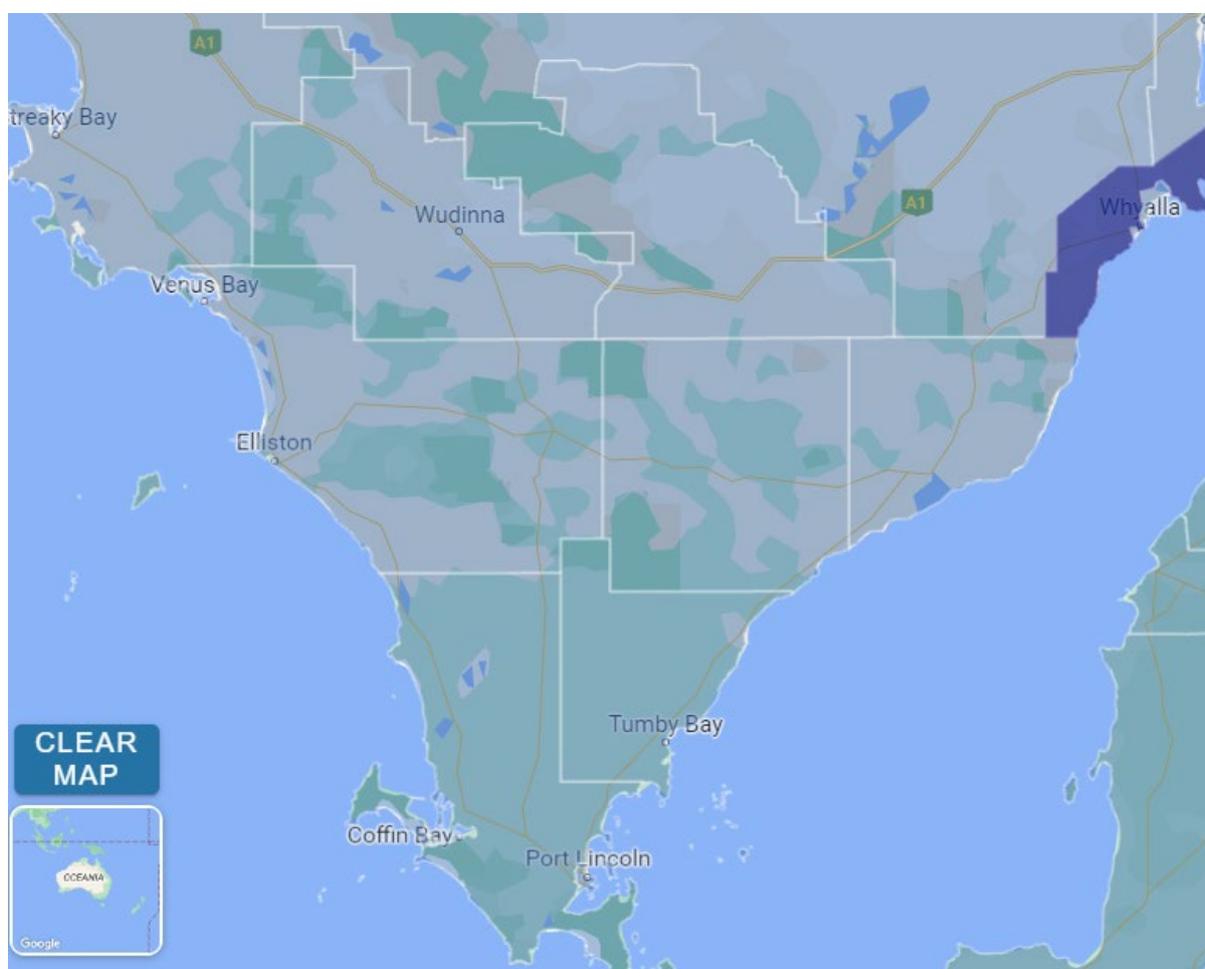
A new long 100 place daycare centre should be located in Tumby Bay.

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# Whyalla

## Demographic analysis

Wudinna is a medium sized regional city of over 1000 square kilometres. The main suburbs in addition to Whyalla are Douglas Hills, Mullaquana and Port Bonython.



The District's is known for manufacturing and steel production, with new significant investment in green energy announced for the region.

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## Population

The population in Whyalla is 21894, and has declined marginally (<1%) in the last five years. There are around 1114 children aged four or under, including around 142 Aboriginal or Torres Strait Islander children.

	Whyalla	South Australia
0 to 4 years	5%	5%
5 to 17 years	17%	15%
18 to 24 years	7%	8%
25 to 64 years	52%	52%
64 to 84 years	17%	17%
85 years and over	2%	3%

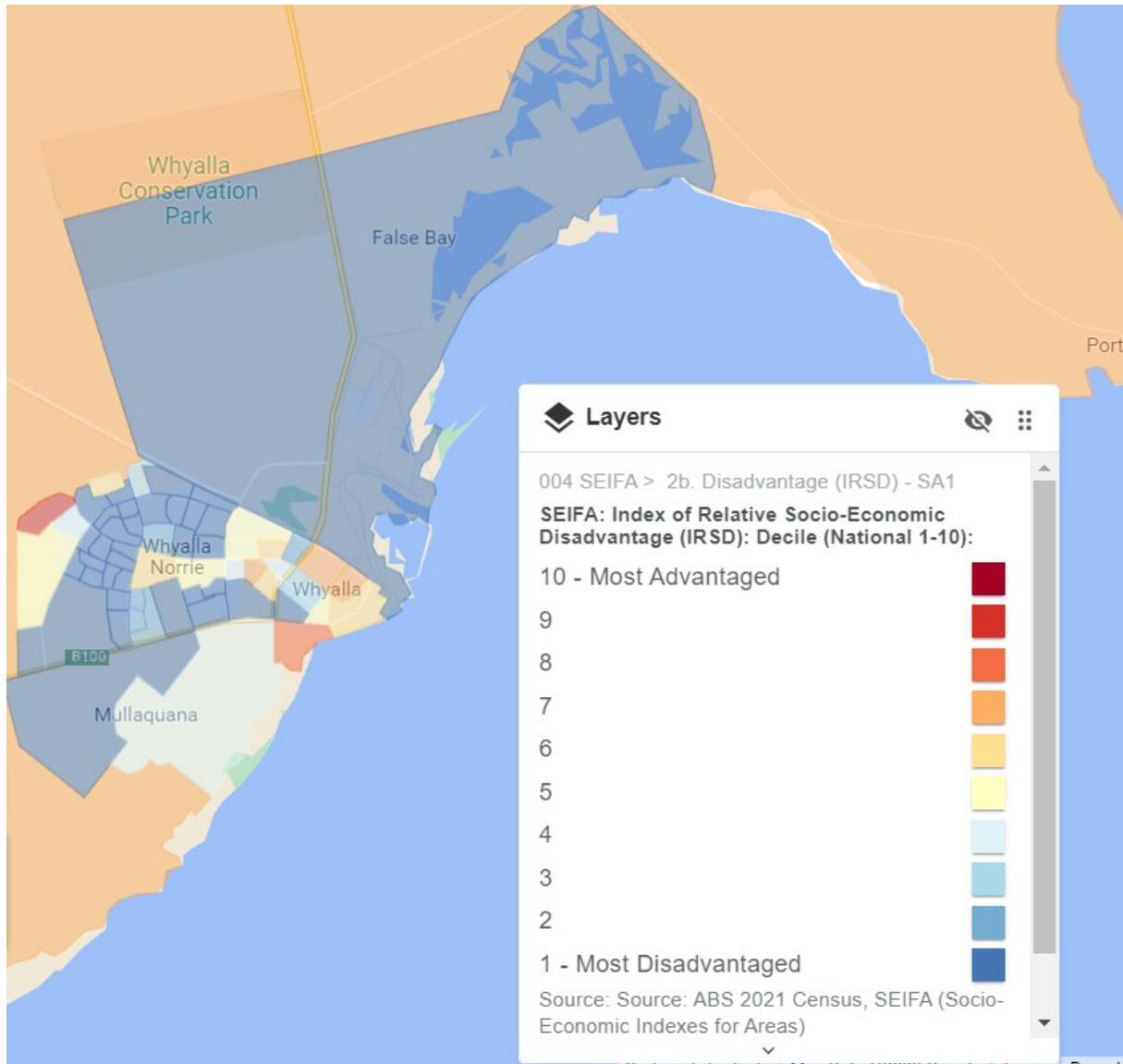
## Income

Income levels in Whyalla are well below the national average with a household income of \$48,066 compared to the national average of \$105,794

## SEIFA

The district varies from highly disadvantaged to advantaged within close proximity. Overall, Whyalla is in the lowest decile for disadvantage and is the 11<sup>th</sup> most disadvantaged area in South Australia.

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## Employment

Whyalla has a higher unemployment rate than average, sitting at 7.58% at the last census. Employment is spread across a breadth of industries including construction, transport, retail, rentals and real estate and health care. A range of new industry investments will drive employment growth, including a hotel development and energy project creating hundreds of jobs. In the long term, investment in green energy and hydrogen may drive creation of thousands of jobs.

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## Maternal Employment

There are a significant number of mothers not in the labour force in Whyalla, representing a potentially untapped labour pool. Women are also much more likely to work part time than full time.

Child aged 0-4	Coupled female	Single female parent
Employment worked full time	116	82
Employed worked part time	235	25
Unemployed	4	16
Not in labour force	247	71

## Projected changes to population of children

The numbers of children are likely to increase only marginally in the next five years, with a projected 1120 children aged 0-4 in 2031. This may change due to increasing industry investment attracting people to the region.

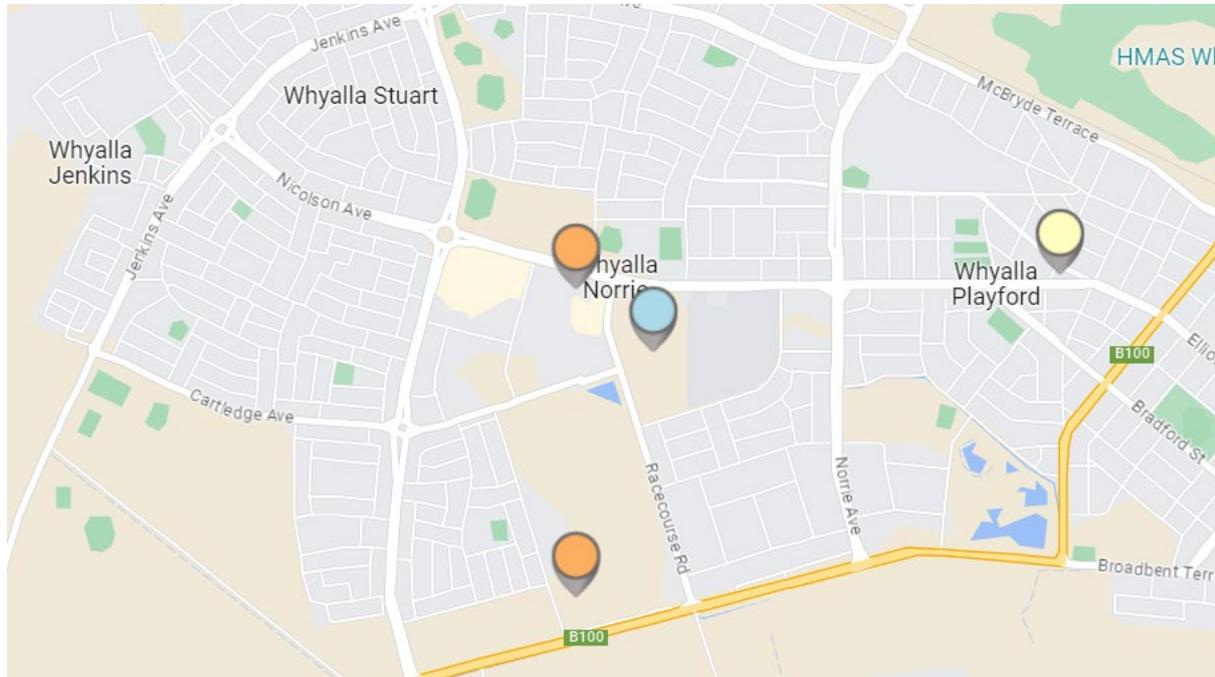
## Children's vulnerability

The Australian Early Development Census is a triennial census which asks teachers of children in their first year of school about each child's development. Aggregated results by community are available for analysis. Results for Whyalla show children are more likely to start school behind than in other areas of South Australia or Australia.

Geography	Physical ①	Social ①	Emotional ①	Language ①	Communication ①	Vuln 1 ①	Vuln 2 ①
Australia	28,341 (9.8)	27,788 (9.6)	24,271 (8.5)	21,107 (7.3)	24,064 (8.4)	63,264 (22.0)	32,718 (11.4)
South Australia	2,023 (10.7)	2,125 (11.2)	1,950 (10.3)	1,494 (7.9)	1,622 (8.6)	4,490 (23.8)	2,411 (12.7)
Whyalla	32 (12.1)	26 (9.8)	20 (7.6)	37 (14.1)	28 (10.6)	66 (25.0)	38 (14.4)

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## Service analysis

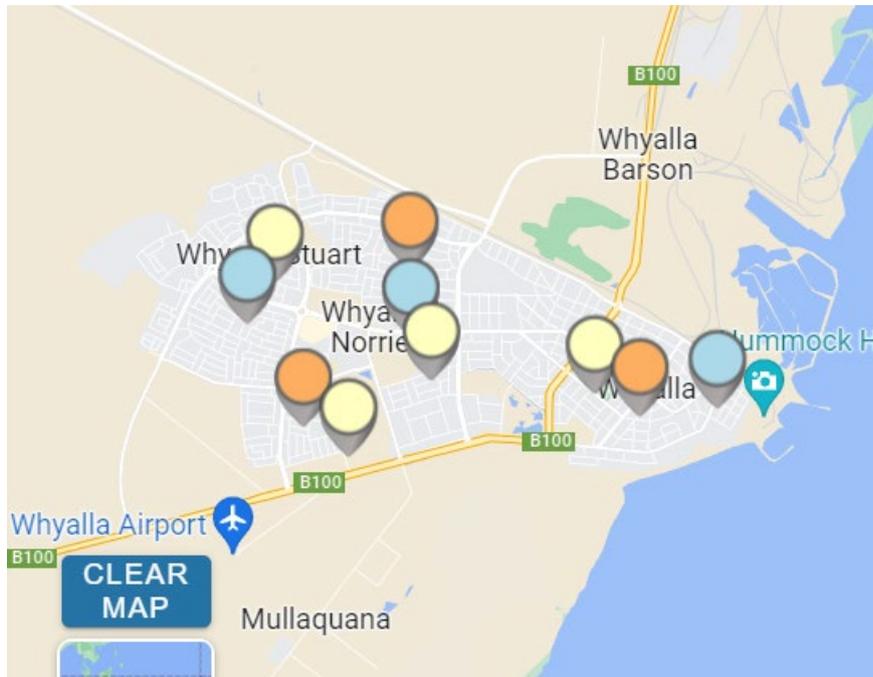


Whyalla has 5 long daycare facilities with 275 places. They are:

- ▶ Goodstart Early Learning – 75 place service Meeting NQS, \$137.50 per day (vacancies)
- ▶ TAFE SA Whyalla Campus – 40 place Working towards NQS, \$110 per day
- ▶ Whyalla Child Care Centre (community based) – 68 place Exceeding NQS, \$97 per day
- ▶ Sunrise Christian School Early Learning Centre – 52 place Exceeding NQS, \$109 per day (2021) age 2 and above
- ▶ Wynbring Jida Child Care Centre (not on map) – a 40 place Multifunctional Aboriginal Childcare Centre that costs \$92 per day

Bar the last centre, all these centres are in Whyalla Norrie or Whyalla Playford. There are around 350 children in Whyalla Stuart and 150 in Whyalla Jenkins, close to half of the population of 0-4 year olds.

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In addition there are 6 kindergartens or early learning centres for children of preschool age and one family day care scheme many of which also offer occasional care (OSHC also on above map):

- ▶ Whyalla Stuart Early Childhood Centre offers occasional care for children over two on Thursday (working towards, 55 place, 44 children preschool in 2022)
- ▶ McRitchie Crescent Childrens Service offers occasional care for children over three on Wednesday and Thursday (Meeting but exceeding in several areas, 45 place, 53 children attending preschool in 2022)
- ▶ Norrie Stuart Children’s Services Centre offers occasional care for children over three on Wednesday and Thursday morning (Exceeding service, 45 place, 29 preschool enrolments)
- ▶ Gabmididi Manoo Children and Family Centre offers occasional care Tuesday to Thursday (Exceeding service, 56 place, 54 preschool enrolments, 50 occasional care enrolments)
- ▶ Win Newby Kindergarten (Meeting service 39 place, 48 preschool enrolments in 2022, a decline from 66 in 2020 due to steel work closure)
- ▶ Neta Kranz Children’s Centre (Exceeding service, 45 places, 37 preschool enrolments)

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## Service needs

CELA's review of early childhood services finds that there are around 171 additional long daycare places needed in the district. The high demand for occasional care demonstrates that parents are wanting additional ECEC although the activity test will limit access to long daycare for parents who are not employed.

Two long daycare centres, of around 100 places each, are needed, to provide for immediate and near term needs given accommodation infrastructure development.

## Location

Consultation should occur to determine the impact of new industry investment on demand for long daycare.

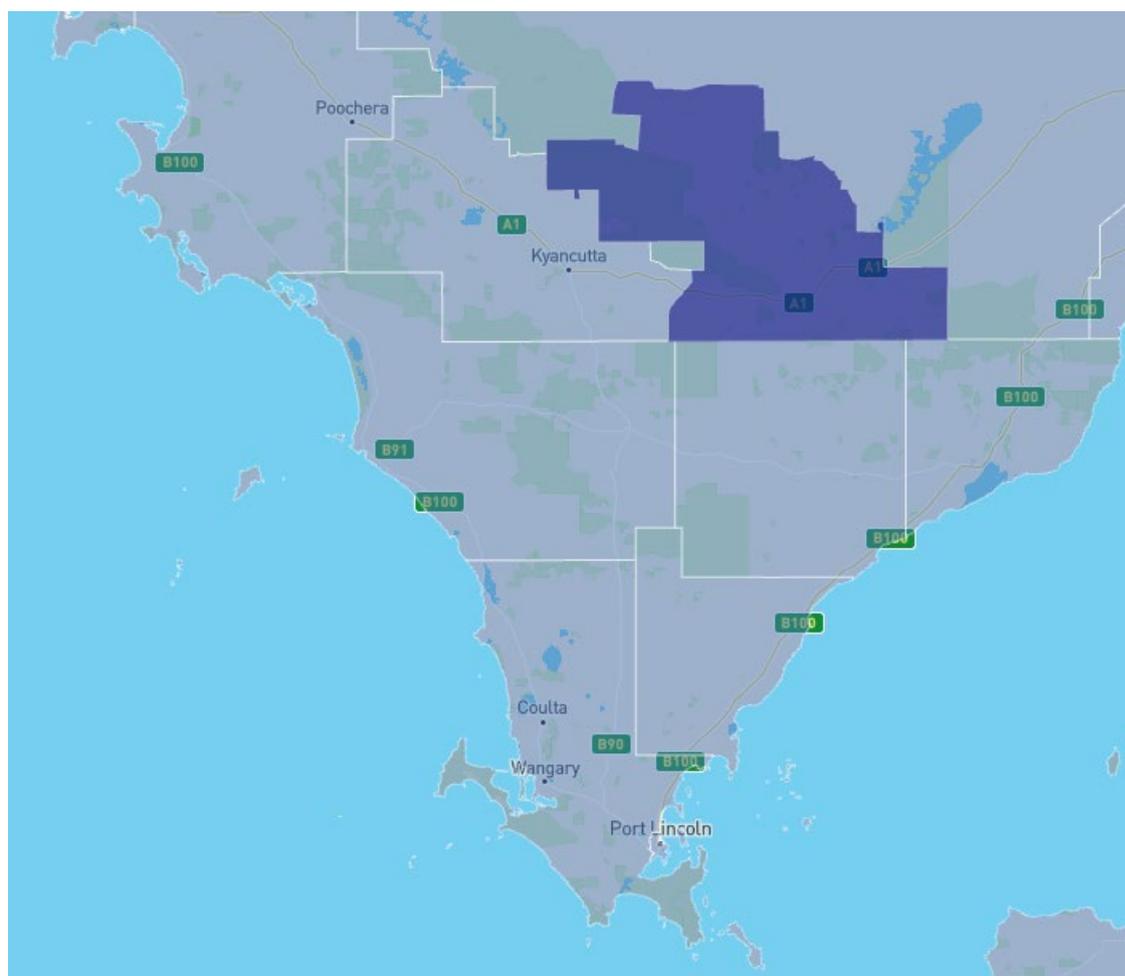
Given the lack of places in the Whyalla Stuart and Whyalla Jenkins regions consideration could be given to siting a long daycare centre in these locations.

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# Kimba

## Demographic analysis

Kimba is a large regional district of nearly 4000 square kilometres.



The district is known for its agricultural production, predominately cattle farming.

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## Population

The population in Kimba is 1049, and has declined around 2.7% in the last five years according to the census. There are around 46 children aged 0 to 4 according to ABS Quickstats, which is higher than earlier census estimates of 35.

	Kimba	South Australia
0 to 4 years	5%	5%
5 to 17 years	18%	15%
18 to 24 years	5%	8%
25 to 64 years	50%	52%
64 to 84 years	18%	17%
85 years and over	4%	3%

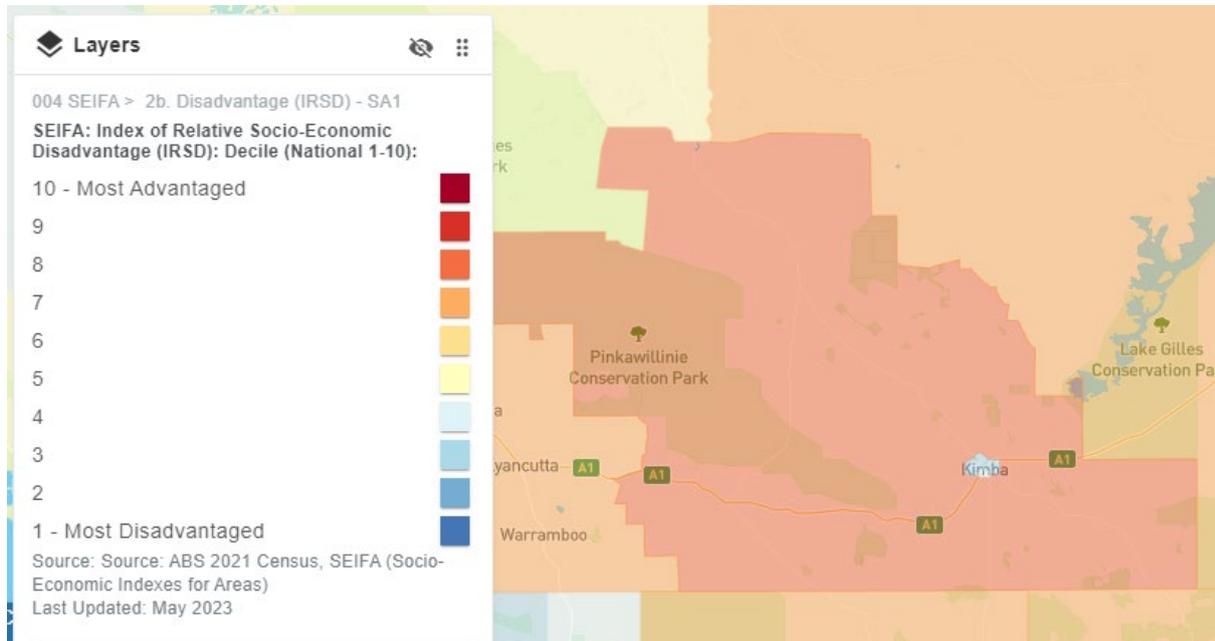
## Income

Income levels in Kimba are below the national average with a household income of \$77,457 compared to the national average of \$105,794.

## SEIFA

Central Kimba is moderately disadvantaged, ranking in the third decile for disadvantage with one being the most disadvantaged and ten being the most advantaged. Families residing on properties outside of central Kimba are likely to be more advantaged and are ranked moderately advantaged in the eight decile.

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## Employment

Kimba has a low unemployment rate, sitting at around 2.4% at the last census. Employment is primarily in agriculture and allied services like transport, and in the service industry including real estate.

## Maternal Employment

Women are much more likely to work part time than full time, with an equal number not working to those working full time.

Child aged 0-4	Coupled female	Single female parent
Employment worked full time	6	6
Employed worked part time	21	9
Unemployed	0	0
Not in labour force	9	3

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## Projected changes to population of children

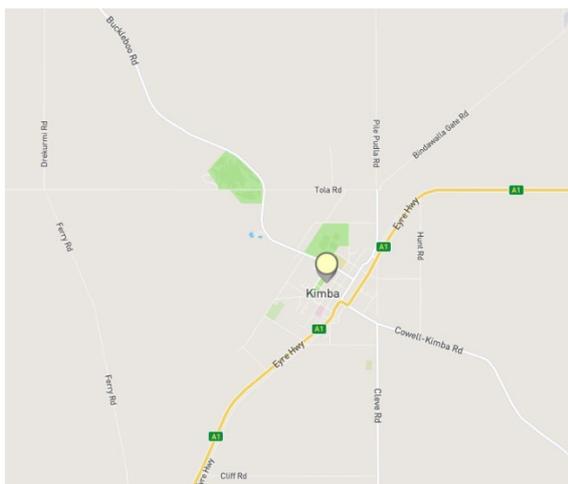
The overall population is likely to diminish by 9.5% by 2031, meaning a fall to around 41 children aged 0-4.

## Children’s vulnerability

The Australian Early Development Census is a triennial census which asks teachers of children in their first year of school about each child’s development. Aggregated results by community are available for analysis. Results for Kimba, which are included in the Cleve/Frankland data, are difficult to rely upon as they are based on few reports, but indicate vulnerability is around the national average. Levels of vulnerability would need to be tested in community consultation.

Geography	Physical ①	Social ①	Emotional ①	Language ①	Communication ①	Vuln 1 ①	Vuln 2 ①
Australia	28,341 (9.8)	27,788 (9.6)	24,271 (8.5)	21,107 (7.3)	24,064 (8.4)	63,264 (22.0)	32,718 (11.4)
South Australia	2,023 (10.7)	2,125 (11.2)	1,950 (10.3)	1,494 (7.9)	1,622 (8.6)	4,490 (23.8)	2,411 (12.7)
Cleve/Franklin Harbour	2 (4.0)	3 (6.0)	0 (0.0)	6 (12.0)	4 (8.0)	9 (18.0)	5 (10.0)

## Service analysis



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Kimba Community Kindergatarn is a 30 place kindergarten rated as meeting National Quality Standards. It provides sessional kindergarten with 19 children attending in 2022. Occasional care is available but families are limited to one 2hr 45m minute session per week.

## Service needs

CELA's review finds that a 19 place early childhood centre would support Kimba to operate at 0.4 places per child, and meet the needs of working parents for long daycare.

### Informing service planning through community consultation

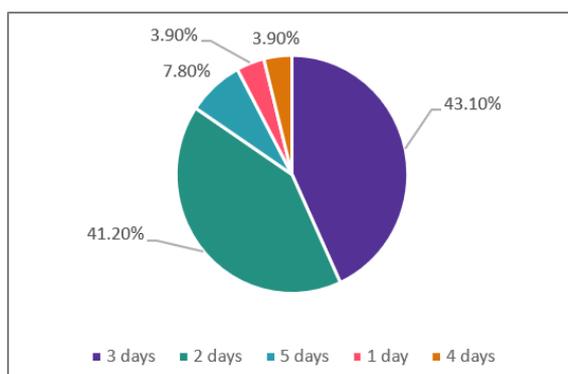
CELA's community consultation in Kimba has confirmed a high level of community interest in long daycare.

A community survey elicited 90 responses include 39 from parents of 0-4 year olds.

Close to 90 percent of the parents of 0-4 year olds said they would utilise long daycare.

Most of these parents would start their children in long daycare from the age on one, and for two to three days per week, although a small proportion want four or five days, and around 4% want one day only. The average of around 2.8 days per week long daycare needed for around 90 percent of families with children aged above one years of age confirms the 19 places estimated.

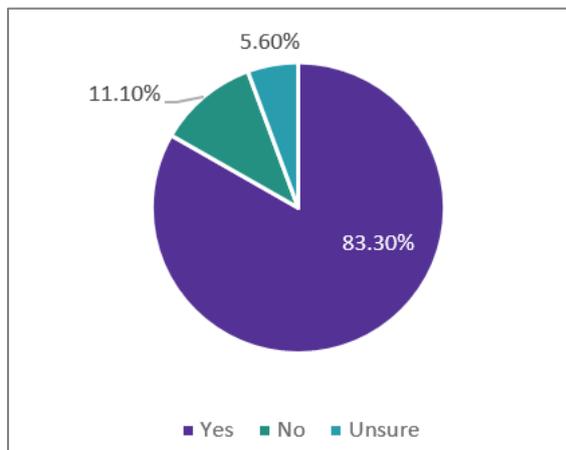
Figure 1: How many days per week would your child attend long day care? Kimba survey



The community consultation also realised a high unmet demand for out of school hours care that could mean additional places are needed beyond those projected if co-location at or near a school is an option.

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**Figure 2 Respondents with children aged 5-12 who would use outside school hours care if available**



Data and quotes provided in the survey strength the case for investment by confirming how an absence of long daycare impacts community capacity to attract workers.

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*“My partner has family in Kimba, we currently live in Adelaide. The one thing that has prevented us from moving to Kimba is the childcare situation. If we were to move now and have children, we would have to rely on solely my partners family for care. I’m a teacher and that will significantly affect how many days I can commit to working if I’m dependent on family members that also work full-time.” – Survey respondent*

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Eighty 80 percent of respondents agree families do not move to Kimba or move from the area because of an absence of long daycare.

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# Part Two

The case for investment in long daycare  
in the Eyre Peninsula

# Case for investment in long daycare in the Eyre Peninsula

## About the Eyre Peninsula

**The Eyre Peninsula is set for tremendous growth, with billions of dollars of investment flowing in the next few years. However, a limited workforce poses a constraint on growth.**

The Eyre Peninsula is a large peninsula of over 170,000 kilometres. The area is one of South Australia's most productive regions, producing over \$3.8 billion of the state's gross state product per annum. The area is renowned for its fishing, aquaculture, agriculture and mining and manufacturing industry. The region is on the precipice of major change, with around \$28 billion of development pipelined over the next decade and close to 30,000 jobs coming the region. The Eyre Peninsula will advance South Australia's green energy industry, and the peninsula is an untapped tourism destination.

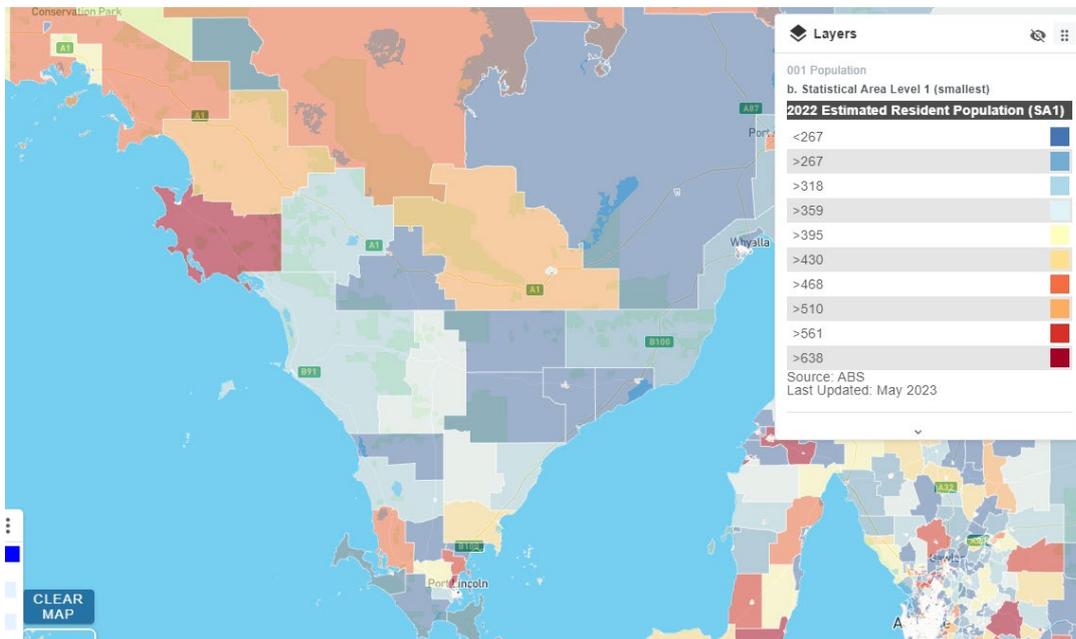
However, the industry's capacity to grow is limited by its ability to grow and attract a local workforce. And a key break on growth is the absence of early childhood education services, in particular long daycare services. This means that thousands of mothers across the region cannot work, and families are not able to settle in the region.

## Demographic outline

**The Eyre Peninsula is vast with it taking over five hours to drive from one end to another. It is made up of two large regional cities and smaller communities, so services need to be dispersed across the region.**

The Eyre Peninsula is a vast region. To drive from north to south takes over five hours, whilst only slightly less to traverse east to west. The peninsula is made up of 11 regions of varying sizes, from populous regional cities of Whyalla and Port Lincoln, to less populous districts like Ceduna and Lower Eyre, and others small communities such as Streaky Bay, Tumby Way, Kimba Wudinna, Elliston and Franklin Harbour.

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## Labour market statistics

**The local labour market is tight with minimal unemployment. Mothers of young children, who are most likely not to work, or to work part time, are a key untapped resource.**

The Eyre Peninsula has a very tight labour market. The unemployment rate in much of the peninsula hovers around 2%, well below the national average. This means there is little capacity to scale up industry within the existing labour force.

The exceptions are the more populous towns with higher levels of disadvantage, with Port Lincoln having average levels of unemployment, and unemployment in Whyalla and Ceduna running at over 7%.

Whilst unemployment is low, a key challenge across the region is that over 600 mothers of young children are not in the labour force at all, around 40% of all mothers in the region. Less than 10% of mothers of young children work full time.

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## Socio-economic disadvantage

**The region has mixed levels of disadvantage, with household income below the state average and pockets of poverty making it less attractive for investors to build long daycare centres.**

The Eyre Peninsula is large and diverse. Whilst average household incomes usually hover between \$75,000 and \$85,000 per annum, over \$10,000 below the state average, many regions have small pockets of advantage and disadvantage. More populous cities experience higher levels of disadvantage with Whyalla having an average household income of \$48,066, and ranking as highly disadvantaged.

This means it isn't attractive for early childhood providers who operate for profit services to set up in major cities, as higher fees cannot be borne by the community, while the smaller communities lack economies of scale to attract investment.

## Health and wellbeing

**One in six women of childbearing age have mental health conditions, which can impact children's development if support is not available. For communities with no long daycare, especially farming communities, integrating care into daily work is a source of immense pressure.**

Over forty percent of the residents in the Eyre Peninsula suffer from a long term health condition, higher than the state average, with around one in six women of childbearing age suffering from long term mental health conditions. Women in rural areas with post partum depression have much higher rates of parenting stress, in part due to the absence of support services. Another contributing factor is the need to combine work with raising children, and place children in risky environments such as during harvest on farms as there is no child care available. A wealth of evidence shows early stress can negatively impact a child's development but this can be moderated through protective factors including strong relationships with caregivers.

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## How children are faring

**Children in the Eyre Peninsula are more likely to start school behind and to stay behind, and part of the reason for this is a lack of early childhood education options that suit the needs of families.**

Across the Eyre Peninsula children are more likely to start school behind their peers than in the rest of South Australia. Around one in four children start school behind in the region, but this rises to two in five in more disadvantaged areas.

Child vulnerability aligns with socio-economic status, so the more disadvantaged an area the higher the likelihood that children start school behind. Many children who start school behind stay behind.

Children from regional and remote areas are less likely to attend preschool, often due to the distance needing to be travelled for short sessions of education. This further impacts children's vulnerability as attendance at early childhood education is associated with better school readiness including higher scores for literacy and numeracy.

## Service availability

**Accessing long daycare isn't an option for families in smaller communities where there is no provider. For families in larger rural cities, a shortage of places means thousands of children miss out, and thousands of parents cannot work.**

Service availability across the Eyre Peninsula ranges from non-existent to sparse. Small towns including Wudinna, Tumby Bay, Franklin Harbour, Elliston and Kimba do not have a long daycare centre, and at best have access to oversubscribed rural care programs often for limited hours. Families need to rely on makeshift arrangements or travel hundreds of kilometres to access long daycare.

Other areas including Ceduna, Whyalla, Port Lincoln and Lower Eyre have limited access, with less than one place per three children, and many families miss out on care.

There are more than 1000 children that miss out on long daycare across the region.

10 new long daycare centres are needed across the district, with one centre needed in each region and two in Whyalla, to provide 556 places to meet community need both immediately and to meet short-term industry needs. Multiple children can occupy a place, for example on different days, hence why less places are needed than children to account for both full and part-time attendance.

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## Cost-benefit analysis of building 10 long daycare centres across the Eyre Peninsula

**The cost-benefit analysis for investing \$55 million in long daycare is clear. Direct returns on investment are in excess of \$55 million per annum, whilst a decrease in child vulnerability will result in savings of over \$6 million per annum. This is in addition to supporting the delivery of \$28 billion in infrastructure projects.**

### Build cost

An investment of around \$5.5 million per centre is needed to enable high-quality multi-function centres that would support current and short-term community growth, include centre fit-out and registration and the recruitment of staff. This equates to a \$55 million investment across the region. This build cost is likely to create dozens of short-term employment opportunities, not accounted for in this modelling.

### Annual direct return on investment

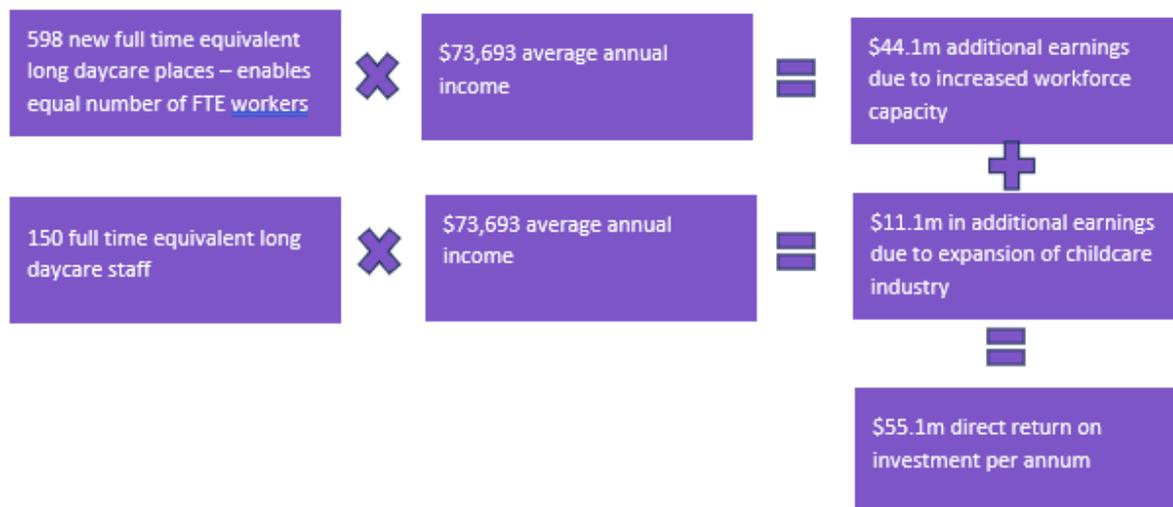
The direct return on investment is derived from the capacity for more parents to work, or to work extra hours, combined with an ongoing increase in employment in the long daycare centres themselves.

Creating 598 places means an equivalent number of parents can work full time (or more if part time). Based on average annual earnings of \$73,693 this equals an additional \$44.1 million per annum in additional earnings for the region. This would have a flow on impact to indirect employment not accounted for here.

Further, the long daycare centres are likely to employ around 150 staff per annum, creating an additional \$11.1 million in employment.

*Therefore, the investment of \$55 millions pays for itself, with a 100% return on investment in the first year.*

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This does not include any return on investment including local employment during the build process.

## Ongoing indirect return on investment

The investment in long daycare is likely to have a range of indirect economic impacts including:

- ▶ Supporting workforce attraction and retention to enable the region to grow, and deliver \$28 billion in new infrastructure projects
- ▶ Supporting greater community functioning including improving maternal physical and mental health
- ▶ Improving children’s outcomes and reducing vulnerability.

Long daycare is essential to enable communities to grow, including to attract a range of essential workers including teachers, nurses and doctors. It is difficult to model the precise contribution long daycare would make to enabling delivery of the \$28 billion new investment, but a lack of daycare will thwart the attraction of workers to the region.

The last of these factors can be modelled to ascertain the long term financial impact of reducing child vulnerability. We know that children who attend early childhood education and care are more likely to be developmentally on track, to start school as prepared as their peers and to complete school.

Across the Eyre Peninsula district more than one quarter of children start school behind at present (with up to forty percent in some areas). This means that at least 380 of the 1495 children who are unable to access early

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learning start school behind. At least half of these children will stay behind and are unlikely to complete school or transition to ongoing employment, at a financial cost of over \$334,000<sup>1</sup> per person over their lifetime.

If just 38 of these children benefit from long daycare sufficiently to start school on track instead, *an additional \$6.5 million will be saved* through lessened social expenditure and increased employment, reduced welfare and criminal costs, and these benefits will be incurred year on year as each cohort starts school ready. Further, this will reduce intergenerational poverty, and increase the capacity of the region.

## Ongoing costs

Further modelling is needed to determine any ongoing subsidisation that smaller services may require to remain viable. It is likely services that are smaller than 50 places may require limited additional financial support to remain viable, depending on the staffing mix, fees and funding. However, this would fall well below the economic benefits of growing the local workforce. Current sources of funding, the Community Child Care Fund (CCCF) are time limited. An ongoing source of funding from state, local or federal government is needed to address the issue of provision in smaller centres.

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<sup>1</sup> <https://www.vu.edu.au/sites/default/files/counting-the-costs-of-lost-opportunity-in-Aus-education-mitchell-institute.pdf>

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FACT SHEET

# The case for long daycare in the Eyre Peninsula

The Eyre Peninsula is set for tremendous growth, with billions of dollars of investment flowing in the next few years. However, a limited workforce poses a constraint on growth, and a key brake on workforce growth is a lack of long daycare services across the region.

This fact sheet presents a summary of key facts about the Eyre Peninsula, and a cost benefit-analysis

of building 10 long daycare centres across the Eyre Peninsula, with 598 places to support over 1000 children to access long daycare.

Investing in long daycare will deliver economic, social and educational benefits across the district both immediately and for generations to come.



\$55 million investment in capital for long daycare returns \$55m annually



Lifelong benefits as more children start school ready and complete, upwards of \$6.5m per year



Enables workforce to support \$28 billion in key infrastructure projects.



Enhances community functioning and gender equality by enabling women to work and increasing household incomes

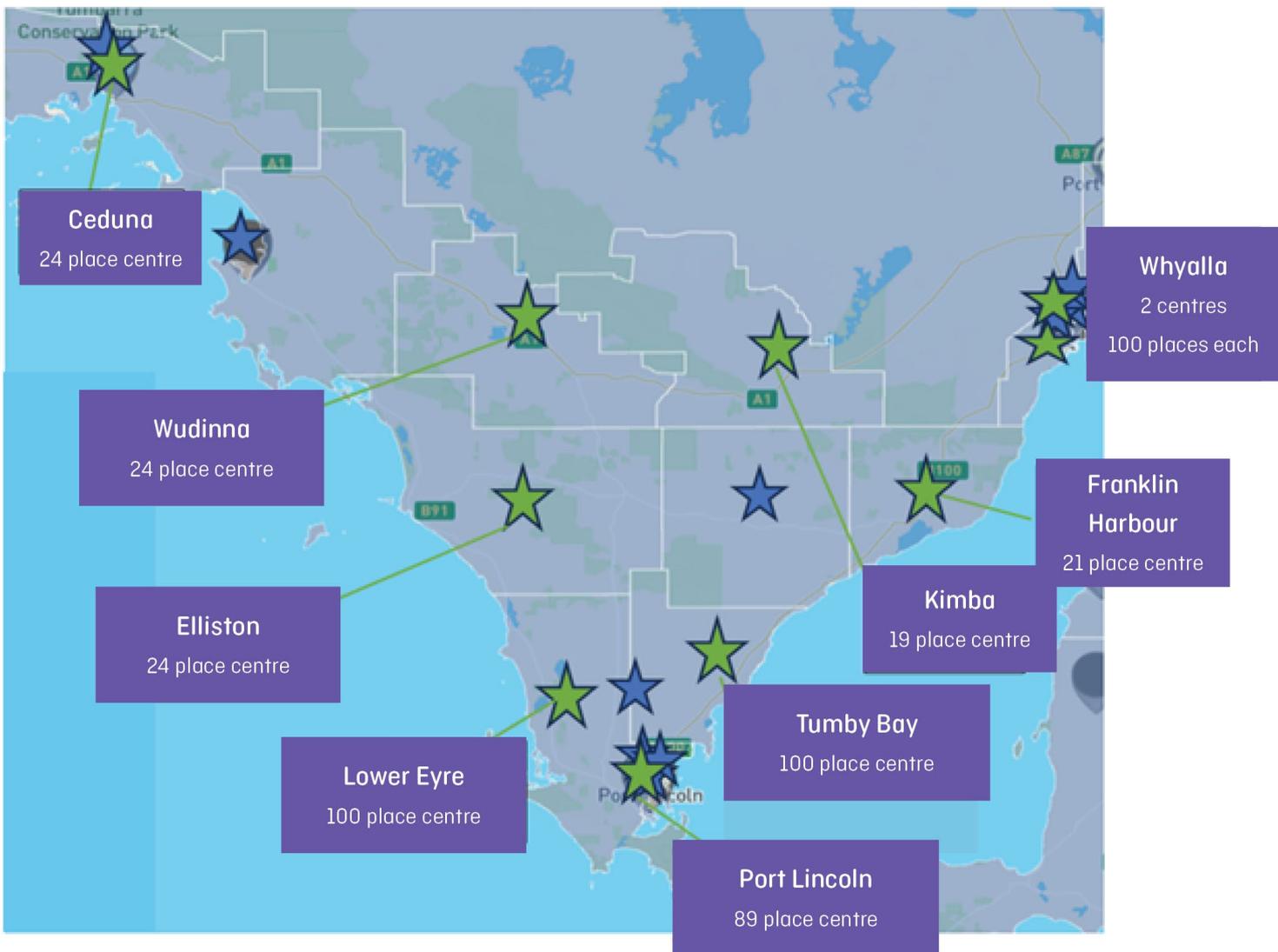
# The case for long daycare in the Eyre Peninsula

The map below illustrates how childcare deserts can be alleviated in a vast, economically critical region.

The blue stars show existing provision (noting multiple services in populous cities) whilst the green stars are the recommended new long daycare centres.

It is possible to alleviate childcare deserts by fully funding the building of new long daycare centres as vital local economic and social infrastructure.

Some of these centres will require ongoing subsidization given their small size. At present this is only possible through the time limited CCCF, but a more permanent mechanism of state, local or federal government funding is needed.



Existing provision (noting multiple services in populous cities)



Recommended new long daycare centres

# The case for long daycare in the Eyre Peninsula

## Key facts about the Eyre Peninsula

### Industry and economic growth

- ▶ The Eyre Peninsula produces over \$3.8 billion of the state's gross state product per annum through industries such as fishing, aquaculture, agriculture and mining and manufacturing.
- ▶ The region is on the precipice of major change, with around \$28 billion of development pipelined over the next decade and close to 30,000 jobs coming the region
- ▶ The Eyre Peninsula will advance South Australia's green energy industry, and is an untapped tourism destination.

Delivery of these key initiatives rests on workforce availability, and without long daycare this is not possible.

### Distance

- ▶ The Eyre Peninsula is a large peninsula of over 170,000 kilometres.
- ▶ It takes about five hours to drive from one end to another.
- ▶ There are 11 regions of varying sizes, from populous regional cities of Whyalla and Port Lincoln with more than 20,000 residents, to small districts with 1000 residents.

The distance across the region is vast, meaning families cannot drive to their nearest service as it may be hundreds of kilometres away.

### Labour market

- ▶ The unemployment rate in most regions hovers around 2%, well below the national average. This means there is little capacity to scale up industry within the existing labour force.
- ▶ More populous towns with higher levels of Port Lincoln, Whyalla and Ceduna have higher unemployment
- ▶ Across the district mothers are unlikely to work, although some work part time.

The tight labour market poses a break on industry expansion. Long daycare will enable mothers to work, and attract new families to the region.

# The case for long daycare in the Eyre Peninsula

## Disadvantage

- ▶ Average household incomes are \$10,000 below the state average, although there are pockets of advantage and disadvantage within each district
- ▶ More populous cities have much higher levels of disadvantage and are amongst the most disadvantaged areas in the state

Some children in the Eyre Peninsula are highly disadvantaged but are least likely to be in early childhood education and care.

## Health and wellbeing

- ▶ Over forty percent of residents have a long term health condition
- ▶ One in six women of childbearing age have a mental health condition

Combining work with raising children creates greater parenting stress, which in turn effects child development outcomes.

## Children's development

- ▶ Across the Eyre Peninsula children are more likely to start school behind their peers than in the rest of South Australia.
- ▶ One in four children starts school behind, rising to two in five in disadvantaged areas
- ▶ Children from regional and remote areas are less likely to attend preschool, often due to the distance needing to be travelled for short sessions of education.

Expanding access to long daycare will provide children in this remote region with a fairer opportunity to start school on track.

# The case for long daycare in the Eyre Peninsula

## Solving the childcare desert – an investment that pays for itself within a year

Families in the Eyre Peninsula live in a childcare desert. This means there is less than one childcare place per three children.

**Families in five districts - Tumby Bay, Wudinna, Elliston, Franklin Harbour and Kimba have no access to long daycare service in their community, and their nearest service can be many hours away.**

Whilst long daycare is available in Whyalla, Port Lincoln, Lower Eyre and Ceduna there are not enough places to meet community demand.

This means most mothers cannot work, and it stops industry from growing as they cannot attract a workforce to the district.

### Findings

Ten new long daycare centres are needed to provide 598 full time places for children aged 0-4 across the region. This will ensure over 1000 children can access long daycare, as most children attend part time so multiple children can occupy a single place.

It will ensure an equal number of parents can work full time, or more if part time, generating economic returns, as well as growing local employment in long daycare centres.

The cost of providing these centres is estimated to be \$55 million, which pays for itself with a 100% return on investment in the first year.

The cost of providing these centres is estimated to be \$55 million, which pays for itself with a 100% return on investment in the first year.

\$44.1m additional earnings as 598 parents can undertake full time work



\$11.1m additional earnings due to expansion of childcare industry



\$55.1m additional earnings per annum

This investment also has immense social returns by supporting community functioning, maternal health, and will have long term returns by reducing child vulnerability.

Half of children who start school behind stay behind. Each child that leaves school early costs governments heavily in terms of additional costs including health,

welfare and criminal justice outlays. By supporting more children to access long daycare, we can expect to see more children start school on track.

If just 38 more children across the district start school on track, this will save \$6.5 million in government expenditure over the cohort of children's lifetime.