



IPART Independent
Pricing and Regulatory
Tribunal | NSW

2025 Independent Market Monitoring Review (IMMR)

Provider costs and data webinar – 14 October 2025

Early childhood education and care team



IPART acknowledges the Traditional Owners of the lands where we live and work. Our office is located on Gadigal land and our work touches on Aboriginal lands and waterways across NSW.

We pay respect to their Elders both past and present, and recognise Aboriginal people's unique and continuing cultural connections, rights and relationships to land, water and Country.

Agenda

- 01 IPART 2025 IMMR
- 02 Data inputs and requests
- 03 Estimating provider costs
- 04 **Discussion and questions**
- 05 Testing cost model inputs
- 06 **Discussion and questions**

*NSW Childcare and
Economic
Opportunity Fund
Act 2022
(CEOF Act)*

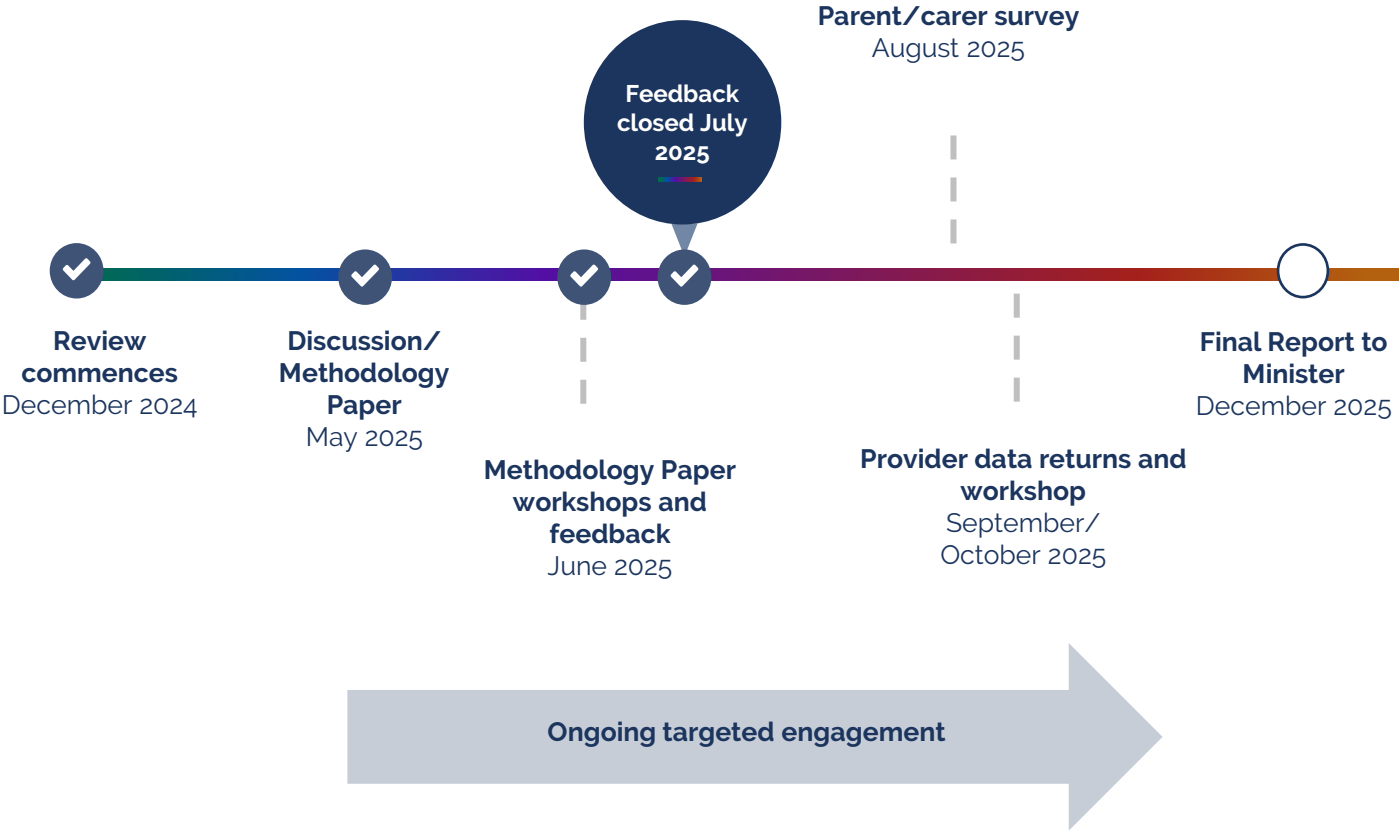
Principal objective

To increase participation in the State's workforce, particularly for women, by making quality ECEC more affordable and accessible

IPART's IMMR role

IPART, as commissioned person, is required to investigate and report on the ECEC sector every 2 years

2025 IMMR timeline



Data inputs for the 2025 IMMR

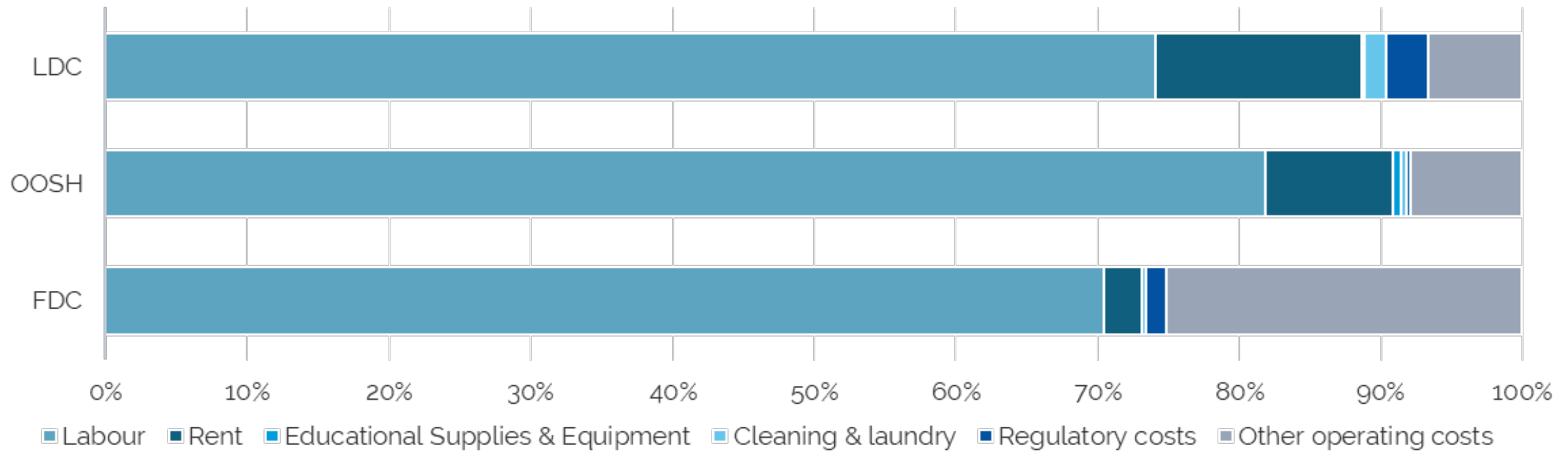
We are using a range of data to undertake our modelling and analysis, for example:

- Child Care Subsidy (CSS) data
- Australian Bureau of Statistics (ABS) data
- Australian Children's Education and Care Quality Authority (ACECQA) data
- National Early Childhood Education and Care Collection (NECECC) data
- Early Childhood Education and Care National Workforce Census (NWC) data
- NSW Dept. of Planning, Housing and Infrastructure (DPHI) and NSW Dept. of Education (DoE) data
- Parent/carers survey results
- Aggregated results of our provider costs and revenue information request
- Information from existing surveys, other research and feedback

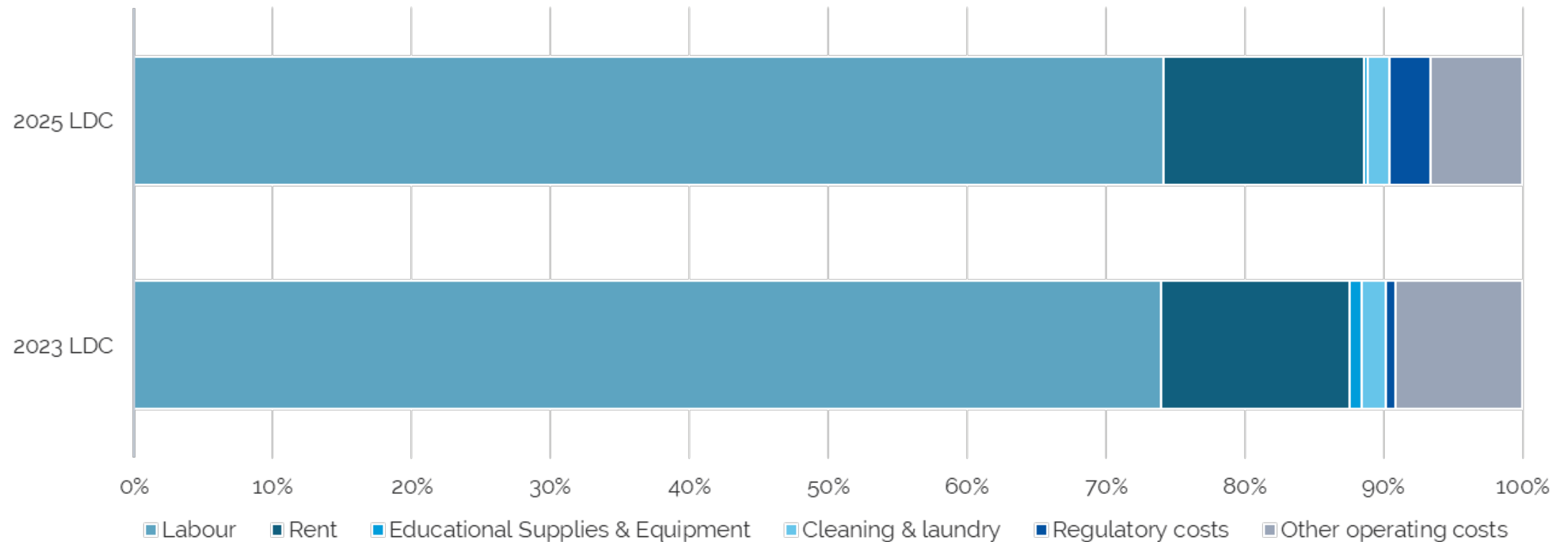
2025 IMMR consultation so far

- 7 Written submissions on Methodology Paper
- ~30 (substantive) responses to our Methodology Paper Feedback Survey
- ~70 attendees across 2 Methodology Paper public webinars
- 12 meetings with key stakeholders
- Attendance at the Aboriginal Community-Controlled Organisation (ACCO) ECEC leadership event hosted by SNAICC (peak national voice for Aboriginal and Torres Strait Islander Children)
- Service site visits – Cullunghutti Aboriginal Child and Family Centre (ACFC), Giiguy Gamambi Preschool in Nambucca Heads
- ~1,700 responses to our parent/carer ECEC survey
- ~30 (substantive) single-service and 7 medium/large service provider responses to our provider costs and revenue information request (totalling ~290 services so far, with 2 more large provider responses yet to come)

2024-25 estimated average provider costs



Changes in long day care (LDC) costs since 2023 IMMR



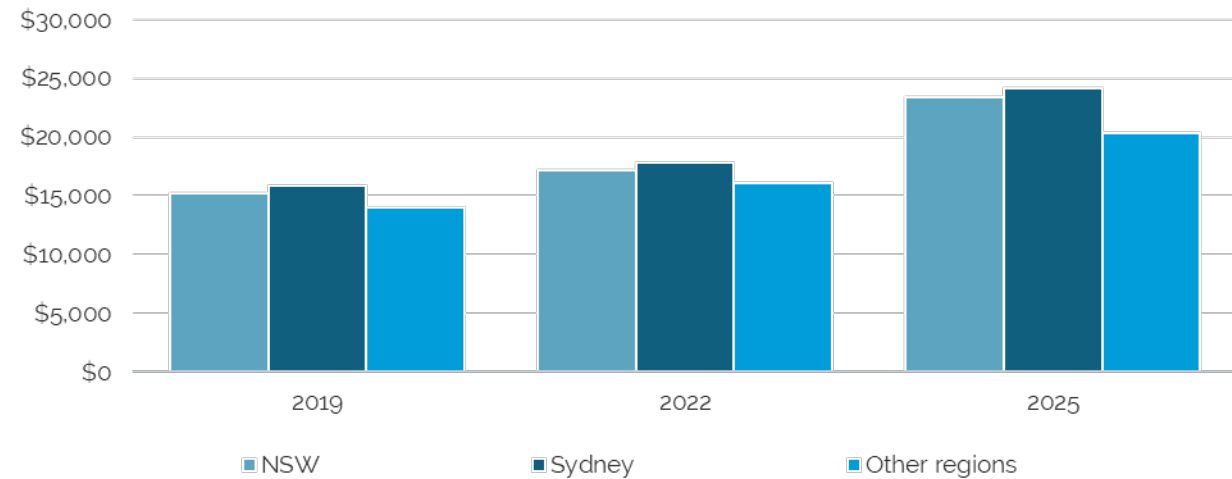
Changes in outside of school hours care (OOSH) costs since 2023 IMMR



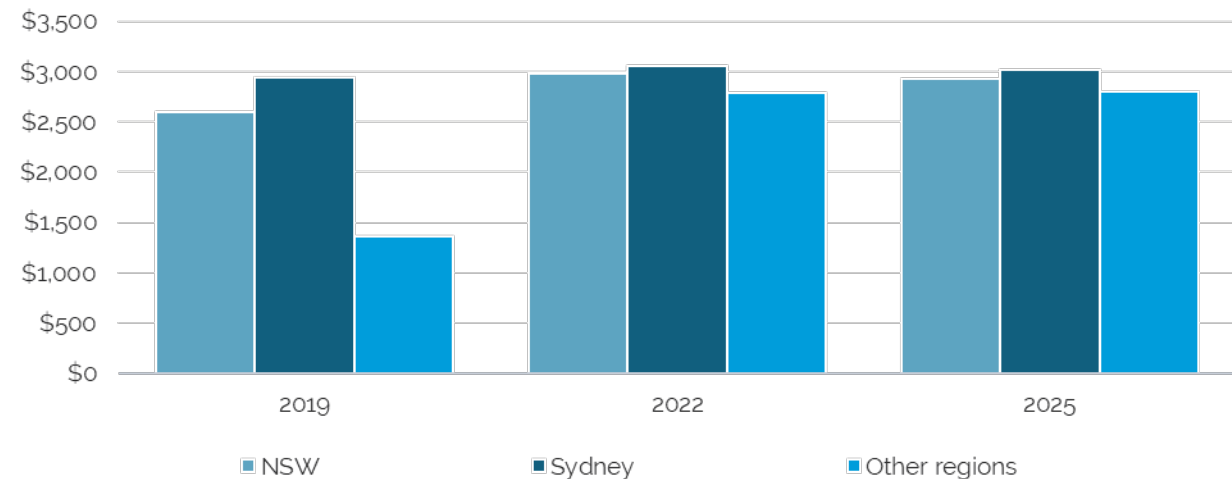
Average labour costs per place offered (\$ nominal)

Preliminary analysis and results

LDC



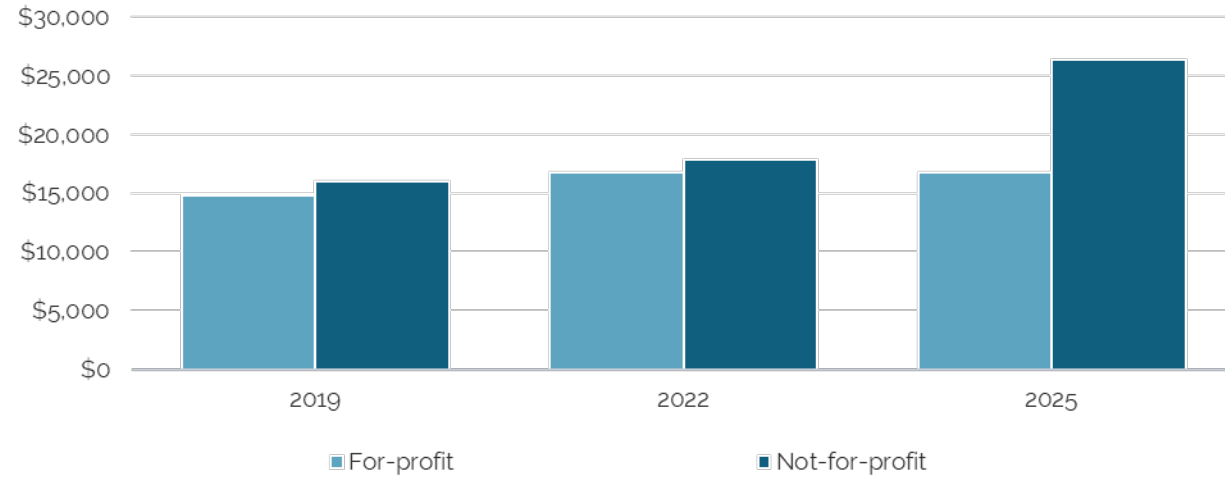
OOSH



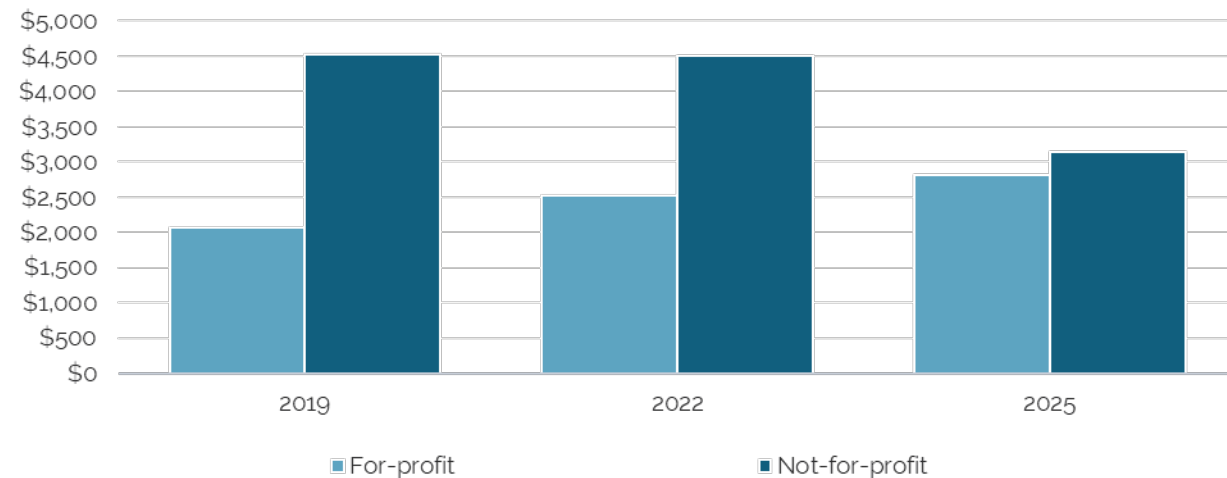
Average labour costs per place offered

Preliminary analysis and results

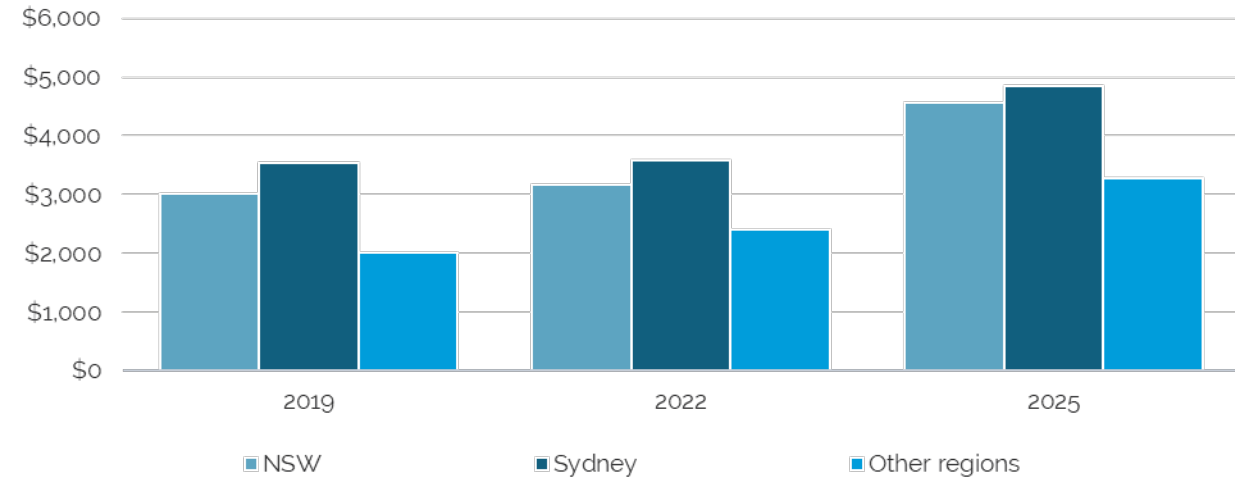
LDC



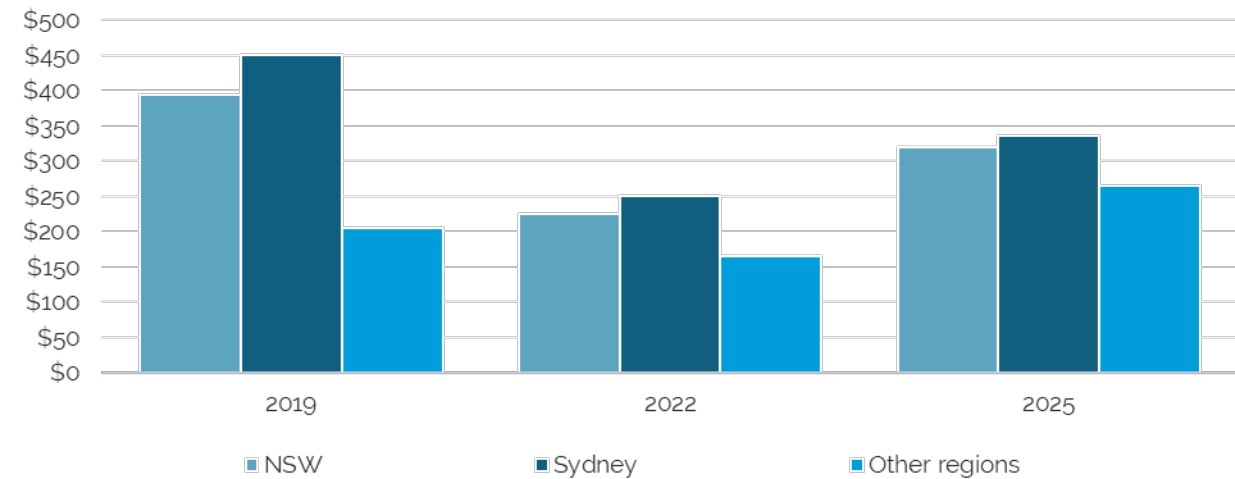
OOSH



LDC

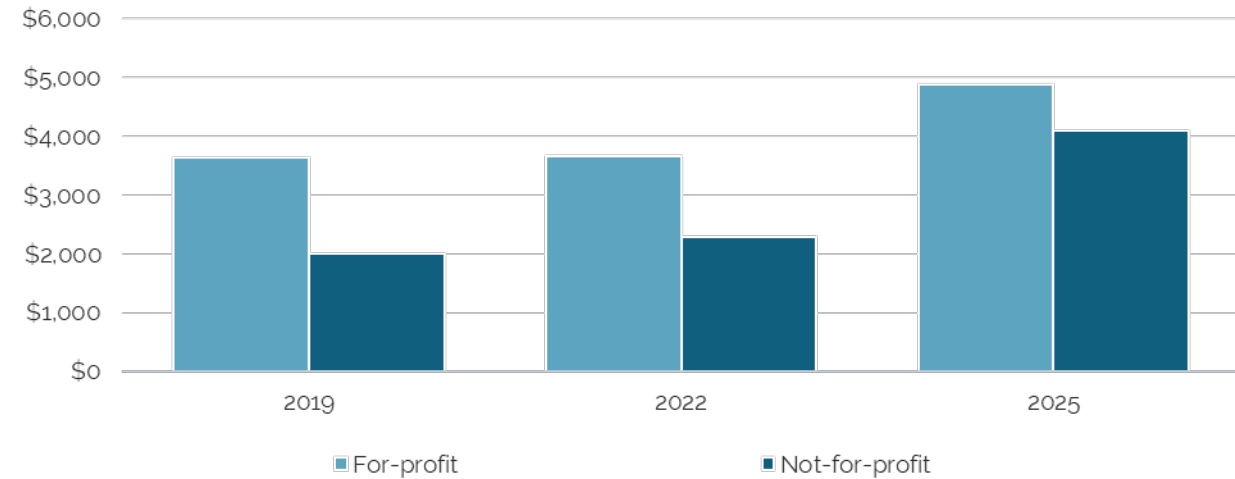


OOSH

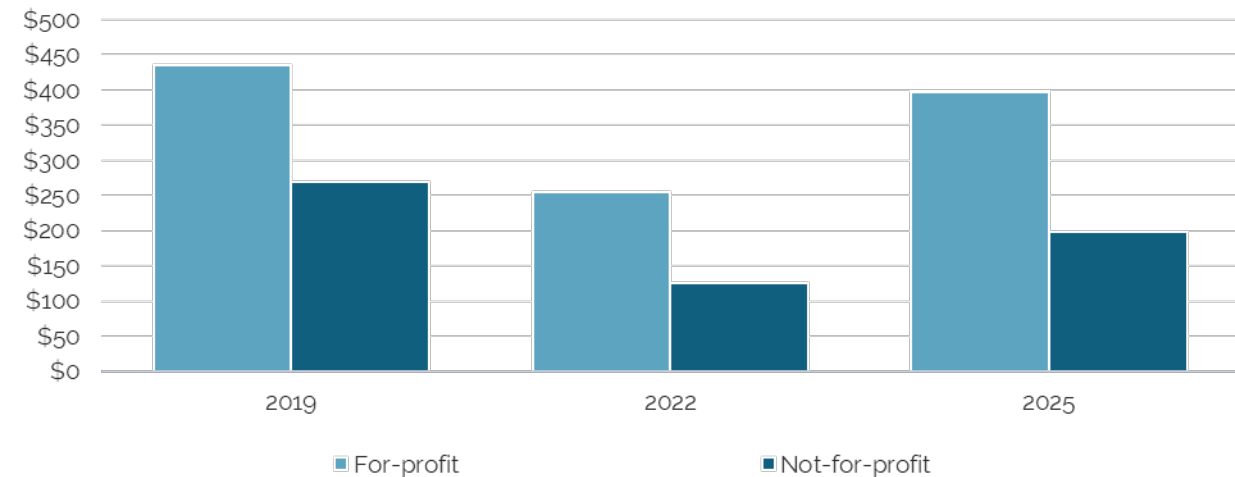


Average rent costs
per place offered

LDC



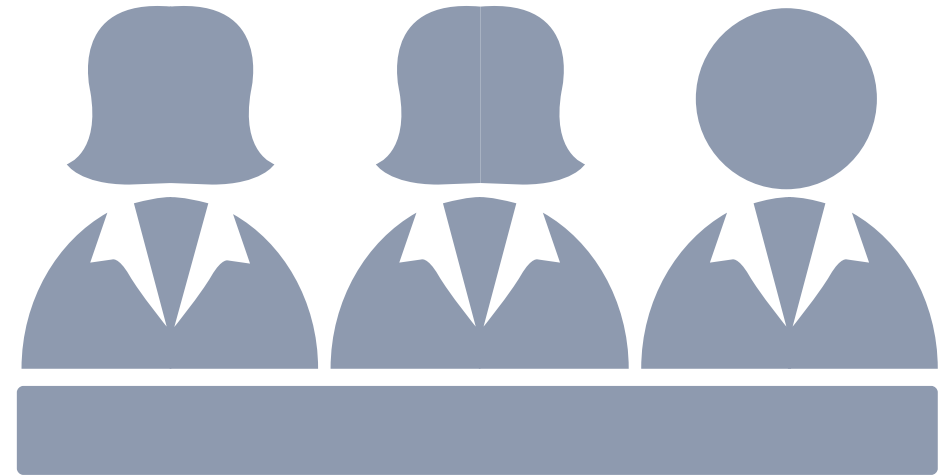
OOSH



Average rent costs
per place offered

Discussion, questions and feedback

- Do these results reflect what you are experiencing?
- What are the key reasons for changes we are seeing?
- What factors are likely to drive future costs?
- What considerations/limitations should we be particularly mindful of?



Cost model inputs – educator qualifications

Service type	% with Degree	% with Diploma/ Certificate	% without qualifications (or working towards qualification)
LDC	21%	73%	5%
FDC	9%	81%	10%
Preschool	31%	67%	2%
OOSH	1%	23%	76%

Cost model inputs – other & inclusion support staff

Service type	Staff type	Average # per service
LDC	Other staff (administration, kitchen, cleaning or management)	1.2
	Staff specifically employed for inclusion support	0.8
Preschool	Other staff (administration, kitchen, cleaning or management)	1.1
	Staff specifically employed for inclusion support	1.2
OOSH	Other staff (administration, kitchen, cleaning or management)	0.1
	Staff specifically employed for inclusion support	0.3

Cost model
inputs –
places
offered
(typical day)

Preliminary analysis and results

Service type	Age group	Average
LDC	0-12 months	6
	13-24 months	9
	25-35 months	16
	3-5 years	33
Preschool	3-5 years	42
OOSH	6-12 years	82

Discussion, questions and feedback?

- Do these results reflect what you are experiencing?
- What factors/considerations/limitations should we be particularly mindful of?



Contact us

Jennifer Vincent

p: (02) 9290 8418

e: Jennifer.Vincent@ipart.nsw.gov.au

Jessica Clough

p: (02) 9113 7744

e: Jessica.Clough@ipart.nsw.gov.au

Visit our website

[Early childhood education and care - 2025 Independent Market Monitoring Review | IPART](#)



Additional slides

Cost model inputs – 2023 IMMR educator qualifications

Service type	% with Degree	% with Diploma/ Certificate	% without qualifications (or working towards qualification)
LDC	17%	83%	N/A
FDC	6%	94%	N/A
Preschool	28%	72%	N/A
OOSH	7%	32%	61%