



FAMILY DAY CARE AUSTRALIA

# Family Day Care Sector Profile

MARCH 2017

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## OVERVIEW

This report is Family Day Care Australia's (FDCA) second quarterly report profiling the family day care sector.

The report consolidates and analyses a number of data sources (including FDCA internal member data<sup>1</sup>, the Australian Children's Education and Care Quality Authority National Register and Australian Bureau of Statistics data) to provide ongoing insight into the nature of the family day care sector.

The report provides information and analysis relating to the general profile of the family day care sector, the location of educators and services by remoteness area and socio-economic disadvantage, educators' age, and services' National Quality Standard (NQS) quality ratings.

Information in this report is presented from the March 2016 quarter to the March 2017 quarter, however the primary focus of the analysis relates to the changes between the December 2016 quarter and the March 2017 quarter.

<sup>1</sup> All FDCA data provided within this report is presented in line with FDCA's Privacy Policy.

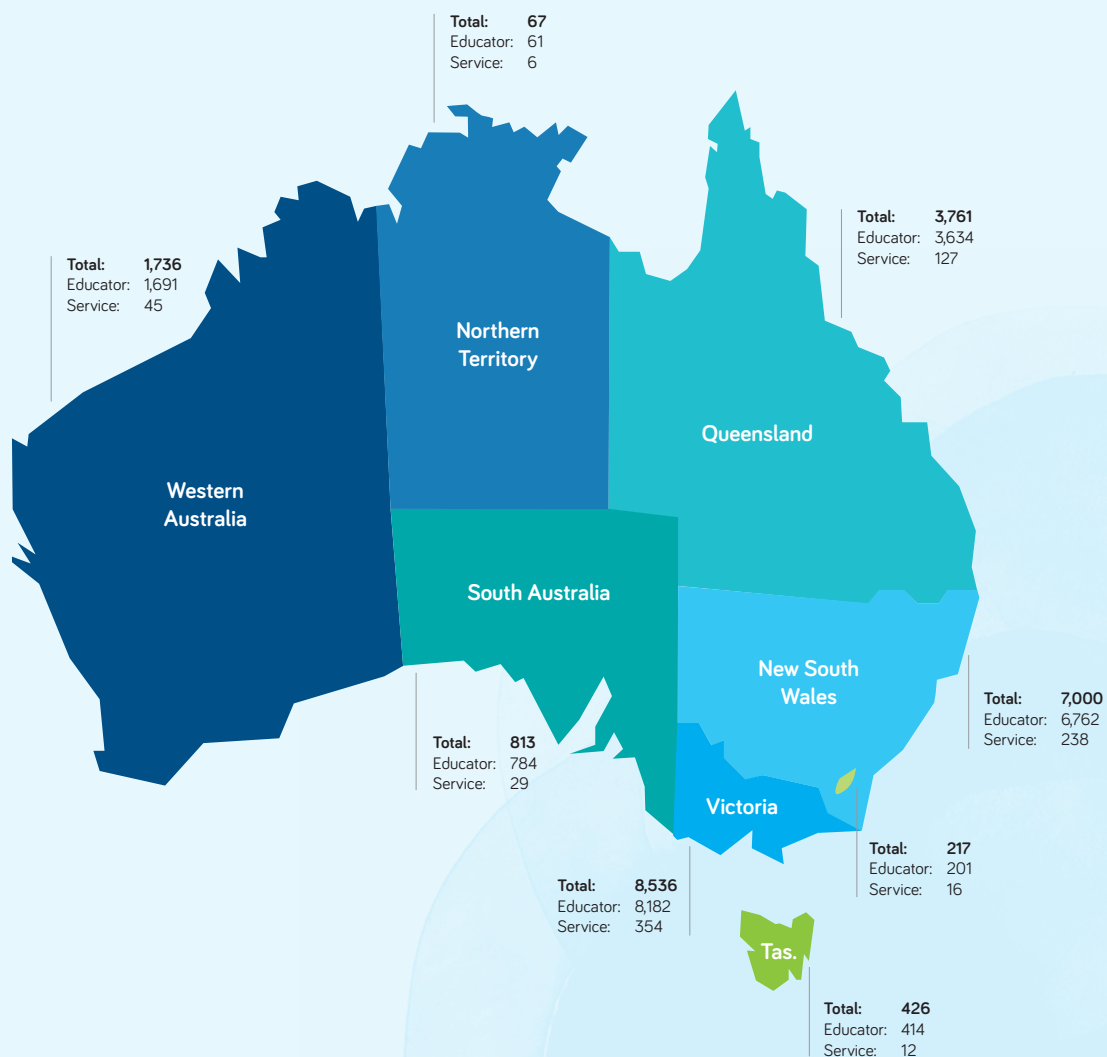
# FDCA MEMBER NUMBERS

Figure 1 below presents the number of FDCA members, both services and educators, by state and territory, as at 31 March 2017.

The total number of family day care services and educators across Australia is 827 and 21,729 respectively.

Victoria has the largest family day care community with 354 services and 8,182 educators, and the Northern Territory is the smallest with 6 services and 61 educators.

**FIGURE 1: NUMBER OF CURRENT FAMILY DAY CARE AUSTRALIA MEMBERS AS AT 31 MARCH 2017.**







## EDUCATOR MEMBER NUMBERS

Table 1 below outlines the total number of family day care educators by state and territory from March 2016 to March 2017.

In line with the general trend across 2016, there continued to be a decrease (3.1%) in total educator numbers across Australia from the December 2016 quarter to the March 2017 quarter. All states and territories showed decreases in educator numbers between these quarters, with the greatest decrease occurring in South Australia (9.1%). The Northern Territory showed a moderate decrease of 6.2%, with the lowest decrease in numbers occurring in Western Australia (2%).

As outlined in the December 2016 edition of the Family Day Care Sector Profile, this trend may partially be attributed to a number of legislative instruments that commenced over this period which made additional changes to the child care payments legislative framework in order to facilitate greater levels of compliance within the sector. This quarter saw the introduction of legislative instruments that restricted the provision of family day care to children aged 14 and over or at secondary school and capped the GCCB/SCCB rate for family day care services.<sup>2</sup>

New South Wales, Queensland and Victoria continue to retain the largest family day care educator numbers, which equates to 85.5% of total educators between the three states.

**TABLE 1: EDUCATOR MEMBER NUMBERS BY STATE AND TERRITORY FROM 31 MARCH 2016 TO 31 MARCH 2017.**

State	Mar-16	Jun-16	Sep-16	Dec-16	Mar-17
Queensland	4,036	4,015	3,912	3,775	3,634
New South Wales	7,254	7,172	7,125	6,974	6,762
Australian Capital Territory	219	217	208	207	201
Victoria	8,442	8,434	8,624	8,396	8,182
Tasmania	460	455	435	426	414
South Australia	1,024	977	922	863	784
Western Australia	1,716	1,723	1,735	1,726	1,691
Northern Territory	76	73	67	65	61
<b>Total</b>	<b>23,227</b>	<b>23,066</b>	<b>23,028</b>	<b>22,432</b>	<b>21,729</b>

<sup>2</sup> The Child Care Benefit (Children in respect of whom no-one is eligible) Amendment Determination 2017; The Child Care Benefit (Session of Care) Amendment Determination 2017.

## SERVICE MEMBER NUMBERS

Table 2 below outlines the total number of family day care services by state and territory from March 2016 to March 2017.<sup>3</sup>

Total service numbers decreased slightly from the December 2016 quarter to the March 2017 quarter (0.5%). The largest decrease in service numbers during this period occurred in Western Australia (8.2%), followed by New South Wales (2.9%).

All other states and territories remained static during this period, or increased service numbers slightly. South Australia showed the greatest percentage increase in service number from the December 2016 quarter (7.4%).

**TABLE 2: SERVICE MEMBER NUMBERS BY STATE AND TERRITORY FROM 31 MARCH 2016 TO 31 MARCH 2017.**

State	Mar-16	Jun-16	Sep-16	Dec-16	Mar-17
Queensland	126	124	132	127	127
New South Wales	221	241	244	245	238
Australian Capital Territory	10	12	14	14	16
Victoria	316	324	344	351	354
Tasmania	12	10	10	12	12
South Australia	27	27	25	27	29
Western Australia	44	48	52	49	45
Northern Territory	5	6	6	6	6
<b>Total</b>	<b>761</b>	<b>792</b>	<b>827</b>	<b>831</b>	<b>827</b>

<sup>3</sup> Please note: FDCA service members may be at different stages in the approvals process, i.e. not all FDCA service members have a final service approval or CCB approval.



# LOCATION

## REMOTENESS AREA

### Educator

Table 3 below provides a breakdown of educator location by remoteness area.

The vast majority (79.6%) of educators continue to reside within Major Cities of Australia. Between the December 2016 and March 2017 quarters the proportion of educators operating in Inner Regional Australia has increased from 13.8% to 14.1%. The proportion of educators residing in Outer Regional Australia has remained relatively static between these quarters at 5.5%. Additionally, 0.6% of educators reside in Remote or Very Remote areas.

The number of educators in all categories has declined between the December 2016 quarter and the March 2017 quarter. There was a 3.2% decline in educator numbers within Major Cities over this period and a 4.6% decline in Outer Regional Australia. The most significant proportional declines over this period occurred in Remote and Very Remote Australia at 14.6% and 22.2% respectively.

20.3% of educators reside in regional or remote areas.

**TABLE 3: EDUCATOR MEMBER NUMBERS BY REMOTENESS AREA<sup>4</sup> FROM 31 MARCH 2016 TO 31 MARCH 2017.**

Remoteness Area	Mar-16	Jun-16	Sep-16	Dec-16	Mar-17
Major Cities of Australia	18,506	18,382	18,376	17,861	17,291
Inner Regional Australia	3,187	3,154	3,145	3,101	3,060
Outer Regional Australia	1,311	1,312	1,284	1,261	1,203
Remote Australia	143	138	142	130	111
Very Remote Australia	35	37	36	36	28
Not Available	45	43	45	43	36
<b>Total</b>	<b>23,227</b>	<b>23,066</b>	<b>23,028</b>	<b>22,432</b>	<b>21,729</b>

<sup>4</sup> ABS Cat. No. 1270.0.55.006 - Australian Statistical Geography Standard (ASGS): Postcode 2011 to Remoteness Area 2006.

## Service

Table 4 presents service member numbers by remoteness area from 31 March 2016 to 31 March 2017.

Service numbers in all remoteness categories increased from the December 2016 quarter to the March 2017 quarter, apart from in Major Cities, which decreased slightly (0.6%).<sup>5</sup>

A total of 18.6% of services are located in regional or remote areas at March 2017, up from 17.4% in the December 2016 quarter.

**TABLE 4: SERVICE MEMBER NUMBERS BY REMOTENESS AREA FROM 31 MARCH 2016 TO 31 MARCH 2017.**

Remoteness Area	Mar-16	Jun-16	Sep-16	Dec-16	Mar-17
Major Cities of Australia	598	641	679	676	672
Inner Regional Australia	95	84	85	92	94
Outer Regional Australia	45	43	44	47	51
Remote Australia	6	7	5	5	7
Very Remote Australia	1	1	1	1	2
Not Available	16	16	13	10	1
<b>Total</b>	<b>761</b>	<b>792</b>	<b>827</b>	<b>831</b>	<b>827</b>

<sup>5</sup> The postcode of the registered office on the ACECQA National Register was utilised to determine the remoteness area of approved services in this report. The December 2016 Family Day Care Sector Profile utilised the postcode registered internally with Family Day Care Australia which may result in some minor discrepancies in the data between the December 2016 data set and the March 2017 set. Of particular note in relation to this matter is the increase of services in remote and regional areas.



## SOCIO-ECONOMIC DISADVANTAGE

### Educator

Table 5 illustrates educator member numbers by socio-economic disadvantage decile from 31 March 2016 to 31 March 2017.

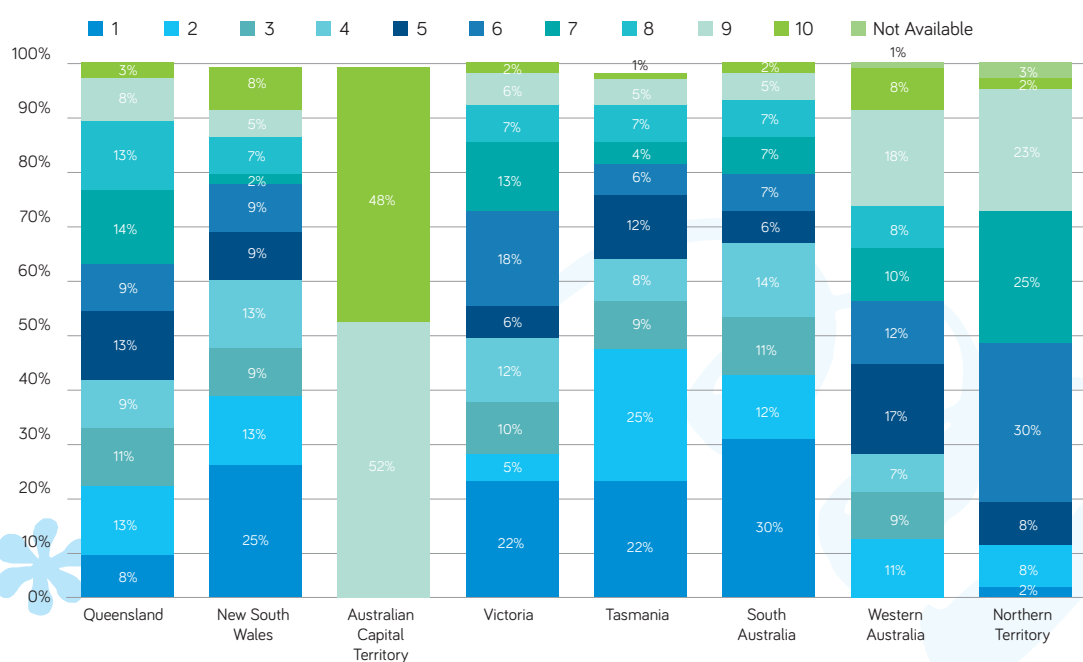
In the March 2017 quarter, the decile with the highest number of educators, at 19.1% is the decile 1 category, which represents areas with the highest level of socio-economic disadvantage. This proportion had decreased only slightly from the December 2016 quarter (19.5%).

Over half (58.9%) of educators continue to reside in areas that are in the five deciles of highest socio-economic disadvantage.

**TABLE 5: EDUCATOR MEMBER NUMBERS BY SOCIO-ECONOMIC DISADVANTAGE<sup>6</sup> FROM 31 MARCH 2016 TO 31 MARCH 2017.**

Index of Relative Socio-economic Disadvantage	Mar-16	Jun-16	Sep-16	Dec-16	Mar-17
1	4,808	4,682	4,591	4,379	4,151
2	2,323	2,313	2,304	2,223	2,139
3	2,319	2,289	2,268	2,199	2,127
4	2,542	2,526	2,510	2,481	2,409
5	2,035	2,075	2,074	2,007	1,968
6	2,819	2,802	2,825	2,775	2,683
7	2,073	2,073	2,060	2,001	1,929
8	1,709	1,671	1,706	1,694	1,695
9	1,494	1,520	1,568	1,550	1,539
10	1,049	1,062	1,071	1,074	1,046
Not Available	56	53	51	49	43
<b>Total</b>	<b>23,227</b>	<b>23,066</b>	<b>23,028</b>	<b>22,432</b>	<b>21,729</b>

**FIGURE 2: EDUCATOR MEMBER NUMBERS BY SOCIO-ECONOMIC DISADVANTAGE AND STATE AND TERRITORY AS AT 31 MARCH 2017 USING AUSTRALIAN RANKING.**



<sup>6</sup> ABS Cat. No. 2033,055,001 Census of Population and Housing: Socio-Economic Indexes for Areas (SEIFA), Australia, 2011.

## Service

Table 6 below depicts service member numbers by socio-economic disadvantage from 31 March 2016 to 31 March 2017.<sup>7</sup>

Similar to the socio-economic distribution of educators, the decile with the highest representation of services is decile 1 (highest socio-economic disadvantage) which retains 22.7% of services.

**TABLE 6:** SERVICE MEMBER NUMBERS BY SOCIO-ECONOMIC DISADVANTAGE FROM 31 MARCH 2016 TO 31 MARCH 2017.

Index of Relative Socio-economic Disadvantage	Mar-16	Jun-16	Sep-16	Dec-16	Mar-17
1	175	176	188	195	188
2	78	80	83	90	88
3	70	71	72	71	81
4	74	82	91	85	90
5	62	60	66	62	64
6	87	103	105	111	104
7	78	74	80	76	75
8	49	52	50	50	52
9	45	45	41	44	48
10	23	26	31	31	30
Not Available	20	23	20	16	7
<b>Total</b>	<b>761</b>	<b>792</b>	<b>827</b>	<b>831</b>	<b>827</b>

<sup>7</sup> The postcode of the registered office on the ACECQA National Register was utilised to determine the remoteness area of approved services in this report. The December 2016 Family Day Care Sector Profile utilised the postcode registered internally with Family Day Care Australia which may result in some minor discrepancies in the data between the December 2016 data set and the March 2017 set.



# EDUCATOR

## AGE

Table 7 below indicates educator member numbers by age from 31 March 2016 to 31 March 2017.

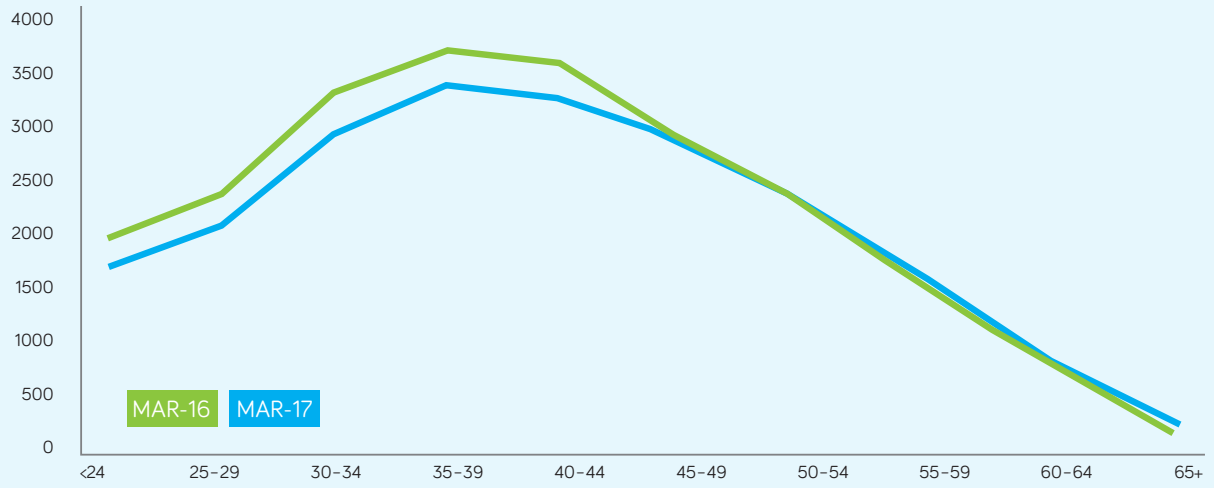
Reflecting the overall decline in member numbers across the period from December 2016 to March 2017, there were minor decreases across most educator age ranges. There were slight increases in the 55-59 age range (1.7%) and the 45-49 age range (0.6%). The largest decreases were in the 25-29 age range (6.7%) and 24 and under (8.1%).

In the March 2017 quarter, 43.8% of educators fell within the 35-49 age range, with the highest proportion of educators located within the 35-39 range (16% of total educators).

**TABLE 7: EDUCATOR MEMBER NUMBERS BY AGE FROM 31 MARCH 2016 TO 31 MARCH 2017.**

Age	Mar-16	Jun-16	Sep-16	Dec-16	Mar-17
<24	1,942	1,973	2,011	1,838	1,690
25-29	2,362	2,334	2,349	2,217	2,068
30-34	3,307	3,210	3,175	3,014	2,911
35-39	3,709	3,657	3,564	3,512	3,393
40-44	3,585	3,497	3,421	3,360	3,259
45-49	2,910	2,937	2,925	2,858	2,875
50-54	2,379	2,402	2,443	2,473	2,375
55-59	1,646	1,670	1,699	1,691	1,721
60-64	1,001	1,008	1,025	1,044	1,007
65+	371	369	410	423	427
Not Available	15	9	6	2	3
<b>Total</b>	<b>23,227</b>	<b>23,066</b>	<b>23,028</b>	<b>22,432</b>	<b>21,729</b>

**FIGURE 3: EDUCATOR MEMBER NUMBERS BY AGE AT 31 MARCH 2016 AND 31 MARCH 2017.**







# SERVICE

## OVERALL QUALITY RATING

Table 8 below depicts the number of services by overall quality rating and state as at 31 March 2017.

As in the December 2016 Family Day Care Sector Profile report, the majority of services in the Australian Capital Territory (64.3%) and South Australia (83.8%) were not yet assessed; however, the number of services not yet assessed in New South Wales and the Australian Capital Territory has decreased over this quarter. The Northern Territory Regulatory Authority has assessed all services as of this quarter. Tasmania has the next largest proportion of services assessed at 85.8%.

Victoria and New South Wales remain the only two states with services rated Significant Improvement Required. The proportion of services with this rating has risen in New South Wales from the previous quarter (representing 8% of services currently rated), and has fallen in Victoria from the previous quarter (representing 4.4% of services currently rated).

**TABLE 8:** NUMBER OF SERVICES BY OVERALL QUALITY RATING<sup>8</sup> AND STATE AND TERRITORY AS AT 31 MARCH 2017.

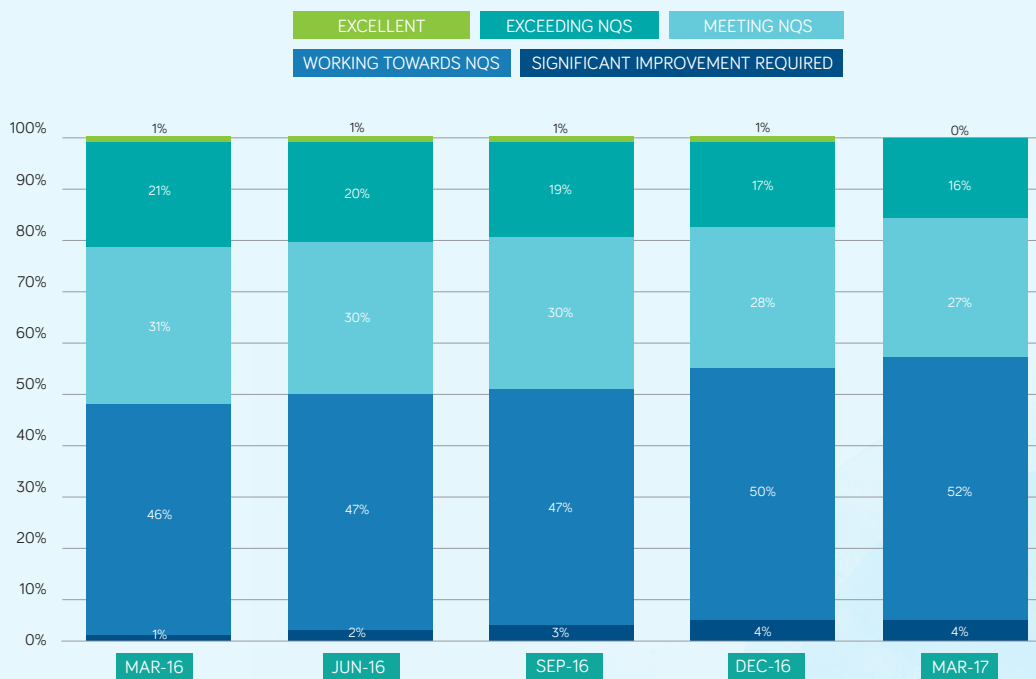
State	Excellent	Exceeding NQS	Meeting NQS	Working Towards NQS	Significant Improvement Required	Not yet assessed	Total	Assessed Services
QLD	2	31	34	22	0	47	136	65%
NSW	0	24	48	90	14	176	352	50%
ACT	0	1	1	3	0	9	14	36%
VIC	0	33	73	156	12	80	354	77%
TAS	0	6	2	4	0	2	14	86%
SA	0	0	0	6	0	31	37	16%
WA	0	2	6	27	0	17	52	67%
NT	1	1	0	2	0	0	4	100%
<b>Total</b>	<b>3</b>	<b>98</b>	<b>164</b>	<b>310</b>	<b>26</b>	<b>362</b>	<b>963</b>	<b>62%</b>

<sup>8</sup> ACECQA National Register, as at 31 March 2017.

Figure 4 below indicates the proportion of services by overall quality rating from 31 March 2016 to 31 March 2017.

The proportion of services in each overall quality rating area has fluctuated slightly from the previous quarter. There is a slight decline in the proportion of services rated Exceeding NQS (from 17% to 16%) and Meeting NQS (from 28% to 27%), and an increase in the proportion of services rated Working Towards NQS (from 50% to 52%). The proportion of services rated Significant Improvement Required remains consistent from the previous quarter at 4%.

**FIGURE 4:** PROPORTION OF SERVICES BY OVERALL QUALITY RATING FROM 31 MARCH 2016 TO 31 MARCH 2017.





## QUALITY AREA RATING

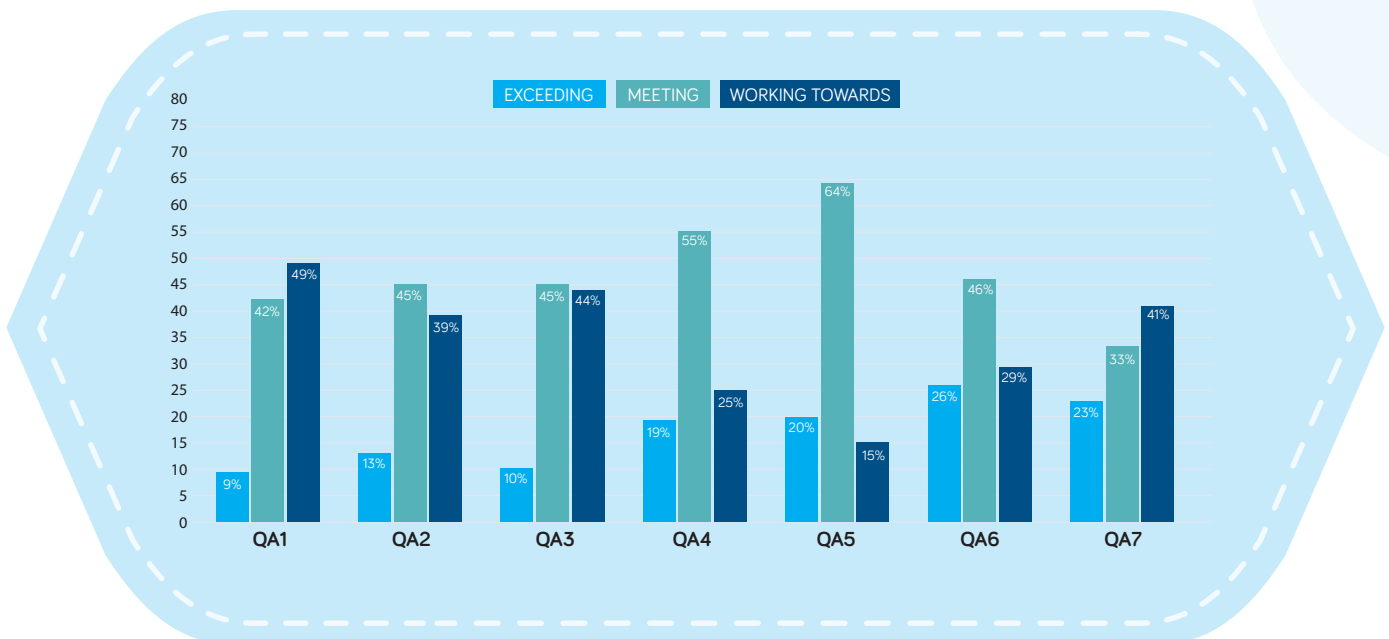
Figure 5 below shows services by NQS Quality Area rating as at 31 March 2017.

The proportion of services rated Exceeding NQS has increased since the last quarter across QA4 (from 11% to 19%), QA5 (from 11% to 20%), QA6 (from 12% to 26%), and QA7 (from 12% to 23%).

74% of services are rated either Meeting NQS or Exceeding NQS in QA4 (Staffing arrangements); 84% fall within these rating categories in QA5 (Relationships with children) and 72% in QA6 (Collaborative partnerships with families and communities).

The majority of services are rated either Meeting NQS or Exceeding NQS in all NQS Quality Areas and the highest proportion of Exceeding NQS ratings are awarded in QA 6 and 7.

**FIGURE 5: SERVICE QUALITY AREA RATING<sup>9</sup> AS AT 31 MARCH 2017.**



<sup>9</sup> The seven NQS Quality Areas are as follows: QA1- Educational program and practice; QA2 - Children's health and safety; QA3-Physical environment; QA4 - Staffing arrangements; QA5 - Relationships with children; QA6 - Collaborative partnerships with families and communities; and, QA7 - Leadership and service management.

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