



FAMILY DAY CARE AUSTRALIA

FAMILY DAY CARE SECTOR PROFILE

JUNE 2018



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1. Overview

This report is Family Day Care Australia's (FDCA) seventh quarterly report profiling the family day care sector.¹

The report consolidates and analyses a number of data sources (including FDCA internal member data,² and data from the Australian Children's Education and Care Quality Authority and the Australian Bureau of Statistics) 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 June 2017 quarter to the June 2018 quarter, however the primary focus of the analysis relates to the changes between the March 2018 quarter and the June 2018 quarter.



1.1 About Family Day Care Australia

Family Day Care Australia is an apolitical, independent, not for profit, national member association representing family day care educators and approved family day care services.

Our mission is to represent, support and promote the family day care sector in delivering high quality early childhood education and care to more Australian children. For more information about Family Day Care Australia go to familydaycare.com.au

¹ All FDCA Family Day Care Sector Profile editions can be accessed at <http://www.familydaycare.com.au/representing-you/sector-profile>

² All FDCA data provided within this report is presented in line with FDCA's Privacy Policy.

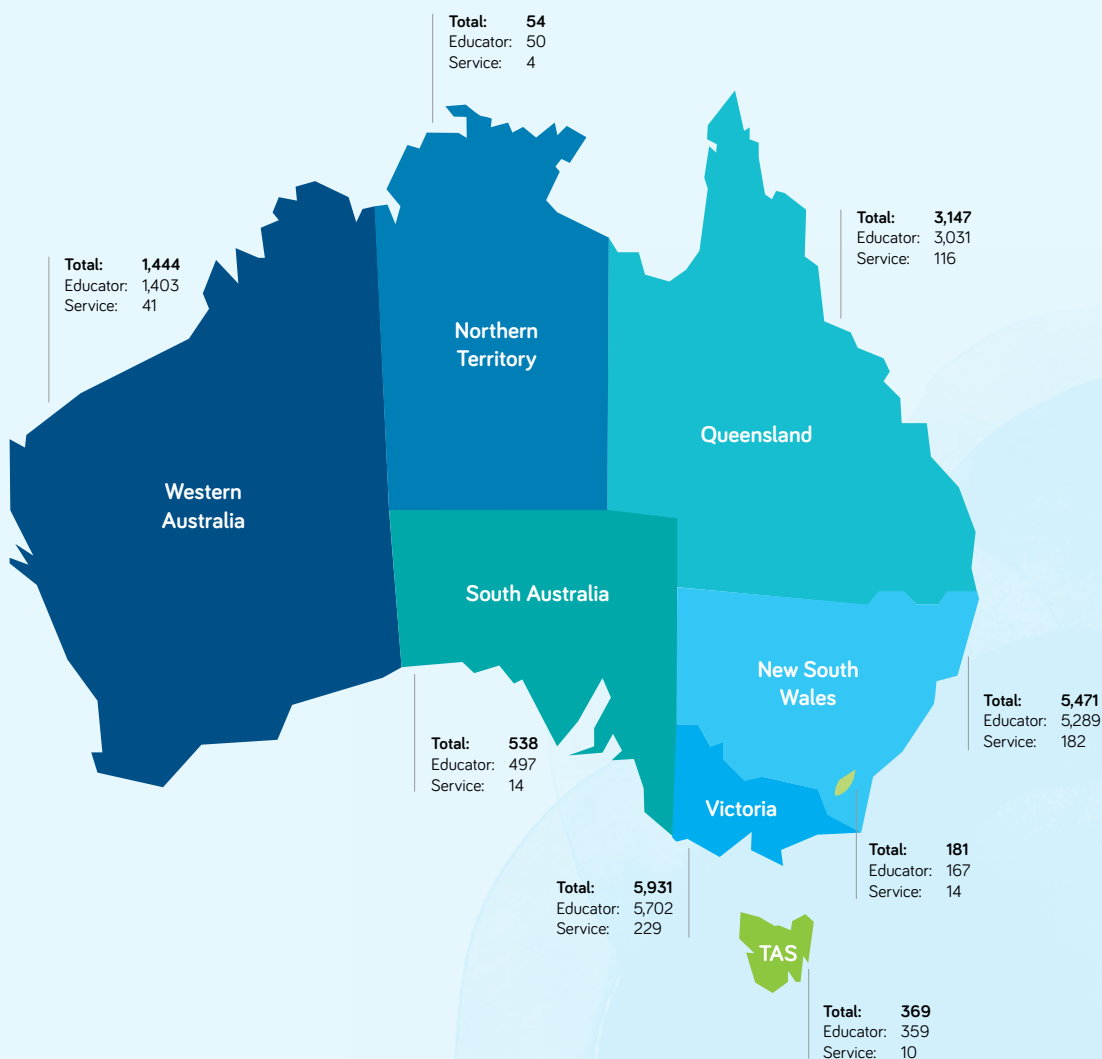
2. State of the Sector

Figure 1 below presents the total number of FDCA members, both services and educators, by state and territory, as at 30 June 2018.

The total number of family day care services and educators across Australia is 610 and 16,498 respectively.

Victoria has the largest family day care community with 229 services and 5,702 educators, and the Northern Territory has the smallest with 4 services and 50 educators.

FIGURE 1: NUMBER OF CURRENT FAMILY DAY CARE MEMBERS AS AT 31 JUNE 2018.



2.1 Educator Member Numbers

Table 1 below provides a breakdown of family day care educator members by state and territory from 30 June 2017 to 30 June 2018.

Victoria, New South Wales and Queensland continue to retain the largest proportion of family day care educator members, representing 85.1% of total educator members across the three states.

In line with the general trend over 2016 and 2017, there continued to be a decrease (7.5 %) in total educator numbers nationally from the March 2018 quarter to the June 2018 quarter as well as decreases across all states and territories. This is the largest percentage decrease in educator numbers between quarters since the inception of the Family Day Care Sector Profile in March 2016. The greatest proportional decline in educator numbers in the last quarter occurred in Victoria (11%) with a decrease of 719 educators. The next highest proportional decreases occurred in South Australia (8.5%), representing a decline of 46 educators, followed by New South Wales (5.9%) with a decline of 332 educators.

As outlined in previous editions of the Family Day Care Sector Profile report, this continued downward trend in numbers of educators may in part be attributed to the impact of a raft of changes to the child care payments legislative framework in recent times, the transition to the new Child Care package³ and ongoing compliance enforcement activity by the Australian Government.

TABLE 1: EDUCATOR MEMBER NUMBERS BY STATE AND TERRITORY FROM 30 JUNE 2017 TO 30 JUNE 2018.

State	Jun-17	Sep-17	Dec-17	Mar-18	Jun-18
Queensland	3,499	3,370	3,256	3,175	3,031
New South Wales	6,581	6,157	5,829	5,621	5,289
Australian Capital Territory	204	197	185	1,71	167
Victoria	7,724	7,098	6,718	6,421	5,702
Tasmania	401	395	391	377	359
South Australia	711	675	584	543	497
Western Australia	1,633	1,565	1,525	1,475	1403
Northern Territory	64	58	53	51	50
Total	20,817	19,515	18,541	17,834	16,498

³ See www.education.gov.au/ChildCarePackage

2.2 Educator Age

The age distribution of educator members from 30 June 2017 to 30 June 2018 is depicted in Table 2 and Figure 2 below.

The age groups currently with the highest proportion of educator members are the 35-39 age bracket (15.4 % of all educator members), the 40-44 age group (15.6%) and the 45-49 age group (15.3%). After the age of 50, the numbers of educators in each age group start to decline more sharply, as can be seen in Figure 2.

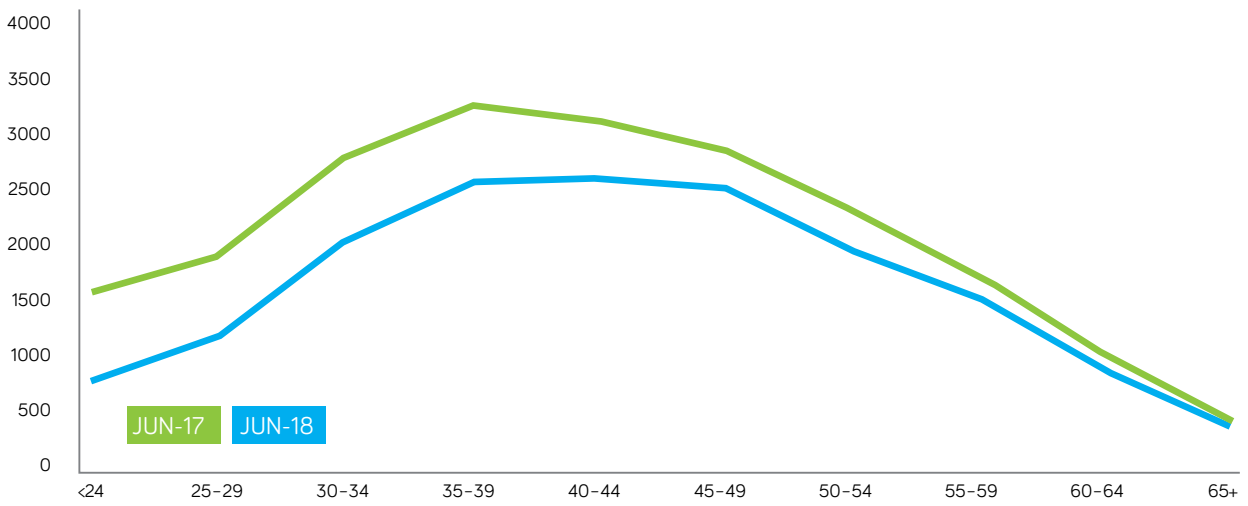
From the March 2018 quarter to the June 2018 quarter there was a decrease in numbers in all educator age brackets, with the three largest proportional decreases occurring in the <24 age group (17.5 %), the 25-29 age bracket (15%), and the 30-34 age group (9.4%).

TABLE 2: EDUCATOR MEMBER NUMBERS BY AGE FROM 30 JUNE 2017 TO 30 JUNE 2018.

Age	Jun-17	Sep-17	Dec-17	Mar-18	Jun-18
<24	1,555	1,282	1,064	941	776
25-29	1,902	1,699	1,571	1,444	1,228
30-34	2,772	2,533	2,309	2,241	2,030
35-39	3,227	3,007	2,867	2,737	2,534
40-44	3,102	3,000	2,836	2,775	2,577
45-49	2,834	2,736	2,657	2,620	2,523
50-54	2,285	2,180	2,157	2,102	1,967
55-59	1,703	1,649	1,650	1,605	1,551
60-64	1,020	1,020	1,005	970	936
65+	415	408	424	398	376
Not Available	2	1	1	1	0
Total	20,817	19,515	18,541	17,834	16,498



FIGURE 2: EDUCATOR MEMBER NUMBERS BY AGE AT 30 JUNE 2017 TO 30 JUNE 2018.



2.3 Service Member Numbers

Table 3 below shows the total member numbers of family day care services by state and territory from 30 June 2017 to 30 June 2018.⁴

The last quarter saw a greater decline in total service member numbers (6.6%) compared with the previous quarter (5.1%). The largest proportional decrease in service numbers occurred in South Australia (12.5%) although the actual numbers were small (n=2). The next largest proportional decrease in service members occurred in the Australian Capital Territory with a decline of 12.5%. Victoria saw the largest decline in terms of actual numbers (n=26), representing 10.2% of the state's service members. Service numbers in the Northern Territory remained the same as for the past two quarters.

TABLE 3: SERVICE MEMBER NUMBERS BY STATE AND TERRITORY FROM 30 JUNE 2017 TO 30 JUNE 2018.

State	Jun-17	Sep-17	Dec-17	Mar-18	Jun-18
Queensland	123	115	118	119	116
New South Wales	217	203	194	192	182
Australian Capital Territory	14	14	18	16	14
Victoria	326	298	286	255	229
Tasmania	12	11	12	11	10
South Australia	23	20	15	16	14
Western Australia	44	43	41	40	41
Northern Territory	3	3	4	4	4
Total	762	707	688	653	610

⁴ Please note: at the time of reporting 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 Child Care Subsidy (CCS) approval

3. Location

3.1 Remoteness Area

Educator members

Table 4 below provides a breakdown of educator members' location by remoteness area from 30 June 2017 to 30 June 2018.⁵

Consistent with the overall drop in educator members nationally, the number of educators in all remoteness categories declined between the end of March 2018 and end of June 2018. The largest proportional decline in educator member numbers (14.3%) occurred within the Very Remote Australia category, but the actual numbers (n=3) were very small, while the Major Cities of Australia category showed the largest decrease in actual educator numbers (1,114), equating to 8% of all educators in this category. Over this reporting period, there were also declines in numbers within the Outer Regional Australia and Inner Regional Australia categories of 7% and 5.3% respectively.

Despite these declines, the remoteness profile of the family day care sector has not changed significantly. The vast majority (78%) of educators continued to reside within the Major Cities of Australia, which was largely unchanged from the previous reporting period (78.4%). The proportion of educators residing in Inner and Outer Regional areas (21.4%) remained essentially the same as at end of March 2018 (21.6%), and the percentage of educators residing in Remote Australia and Very Remote Australia showed no change at 0.8%.

TABLE 4: EDUCATOR MEMBER NUMBERS BY REMOTENESS AREA FROM 30 JUNE 2017 TO 30 JUNE 2018.

Remoteness Area	Jun-17	Sep-17	Dec-17	Mar-18	Jun-18
Major Cities of Australia	16,486	15,325	14,457	13,984	12,870
Inner Regional Australia	2,999	2,912	2,838	2,646	2,505
Outer Regional Australia	1,163	1,116	1,090	1,067	992
Remote Australia	110	116	110	113	112
Very Remote Australia	25	21	22	21	18
Not Available	34	25	24	3	1
Total	20,817	19,515	18,541	17,834	16,498

⁵ ABS catalogue 1270.055.005 - Australian Statistical Geography Standard (ASGS): Volume 5 - Remoteness Structure, July 2016, released 16.3.2018

Service members

Service member distribution by remoteness area from 30 June 2017 to 30 June 2018 is presented in Table 5 below.⁶

The general downward trend in service member numbers in the Major Cities of Australia continued over the last quarter, showing a decline of 42 services, which represented an 8.2% decrease since the previous quarter. There was also a small drop of 4.1% in service member numbers in Outer Regional Australia. In Remote Australia there was a 25% increase in service members, although in actual numbers this equated to a rise of just one service, and there was no change in numbers of services in Inner Regional and Very Remote Australia.

The proportion of services located in regional or remote areas represented 23.3% of total service members, up slightly from the previous quarter (21.9%).

TABLE 5: SERVICE MEMBER NUMBERS BY REMOTENESS AREA FROM 30 JUNE 2017 TO 30 JUNE 2018.

Remoteness Area	Jun-17	Sep-17	Dec-17	Mar-18	Jun-18
Major Cities of Australia	616	562	539	510	468
Inner Regional Australia	91	90	92	88	88
Outer Regional Australia	47	47	49	49	47
Remote Australia	6	6	5	4	5
Very Remote Australia	2	2	2	2	2
Not Available	0	0	1	0	0
Total	762	707	688	653	610

⁶ ABS catalogue 1270.055.005 - Australian Statistical Geography Standard (ASGS): Volume 5 - Remoteness Structure, July 2016, released 16.3.2018



3.2 Socio-economic Disadvantage

Educator members

Table 6 below illustrates numbers of educator members by relative socio-economic disadvantage from 30 June 2017 to 30 June 2018.⁷

Variations in the distribution of educator members over the June 2018 quarter have been minimal. For example, there has been almost no change in the proportion of educator members residing in decile 1 and 2 areas (representing the two areas of highest socio-economic disadvantage): 23.9% compared to 23.4% as at end of March 2018.

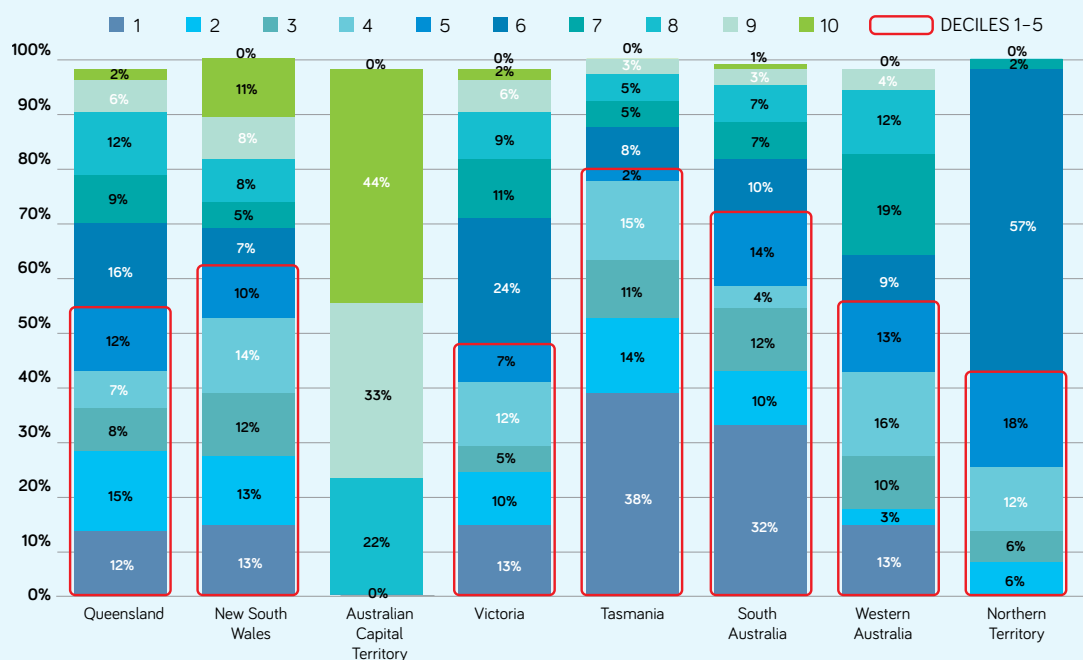
Similarly, over half (52.2%) of all educator members nationally resided in areas that are ranked within the first five deciles of highest socio-economic disadvantage, which is almost the same proportion as in the previous quarter (52.9%). However this distribution is not consistent across all states and territories as depicted in Figure 3 below. The states with the largest proportions of educators residing in areas ranked within the first 5 deciles of relative socio-economic disadvantage are Tasmania (80%), South Australia (72%), New South Wales (62%), and Queensland (54%), with Victoria sitting at just under half at 47%. These proportions are the same as for the previous quarter, despite movement in actual member numbers nationally.

TABLE 6: EDUCATOR MEMBER NUMBERS BY RELATIVE SOCIO-ECONOMIC DISADVANTAGE FROM 30 JUNE 2017 TO 30 JUNE 2018.

Index of Relative Socio-economic Disadvantage	Jun-16	Sep-17	Dec-17	Mar-18	Jun-18
1	3855	3,381	3,006	2,252	2,033
2	2031	1,886	1,766	2,085	1,907
3	1989	1,860	1,765	1,408	1,285
4	2330	2,190	2,090	2,024	1,875
5	1891	1,791	1,721	1,667	1,522
6	2625	2,519	2,426	2,747	2,548
7	1853	1,765	1,718	1,526	1,396
8	1662	1,598	1,560	1,815	1,707
9	1501	1,461	1,428	1,307	1,261
10	1039	1,033	1,029	993	953
Not Available	41	31	32	10	11
Total	20817	19,515	18,541	17,834	16,498

⁷ ABS catalogue 2033.055.001 - Census of Population and Housing: Socio-Economic Indexes for Areas (SEIFA), Australia, 2016.

FIGURE 3: EDUCATOR MEMBER NUMBERS BY SOCIO-ECONOMIC DISADVANTAGE AND STATE AND TERRITORY AS AT 30 JUNE 2018.



Service members

Table 7 below depicts service member distribution by relative socio-economic disadvantage from 30 June 2017 to 30 June 2018.⁸ During this reporting period, the deciles with the highest representation of services are deciles 1 and 6, with 13.8% of services each, followed closely by decile 2 with 12.1% of service members.

Just over a quarter of service members (25.9%) are located within deciles 1 and 2 (the two highest areas of socio-economic disadvantage), slightly down from the previous quarter (26.6%). Over half (54.6%) of family day care services continue to be located in areas categorized under the five deciles of highest socio-economic disadvantage. This represents a marginal increase on the previous quarter (53.9%).

TABLE 7: SERVICE MEMBER NUMBERS BY SOCIO-ECONOMIC DISADVANTAGE FROM 30 JUNE 2017 TO 30 JUNE 2018.

Index of Relative Socio-economic Disadvantage	Jun-17	Sep-17	Dec-17	Mar-18	Jun-18
1	170	145	135	87	84
2	78	66	65	87	74
3	78	76	79	61	61
4	85	80	79	63	59
5	59	60	59	54	55
6	95	91	89	92	84
7	68	64	61	67	63
8	47	47	46	58	52
9	50	44	44	49	46
10	26	26	24	35	32
Not Available	6	8	7	0	0
Total	762	707	688	653	610

⁸ For March 18 onwards - ABS catalogue 2033.055.001 - Census of Population and Housing: Socio-Economic Indexes for Areas (SEIFA), Australia, 2016. Additionally, it should be noted that the postcode of the registered office on the ACECQA National Register was utilised to determine the remoteness area of approved services in this report.



4. Service Quality Rating

4.1 Overall Quality Rating

This final section of FDCAs Family Day Care Sector Profile provides insights into performance of family day care services under the National Quality Framework, drawing on data provided by ACECQA.

Table 8 below depicts the number of assessed family day care services by overall quality rating and state or territory as at 30 June 2018. It also includes numbers of services yet to be assessed.

Since the March 2018 quarter, there has been no change in the proportion nationally of assessed services rated as Excellent (0.3%), Exceeding the NQS (16%) and Meeting the NQS (27%). There has been a marginal increase in the proportion of services rated as Working Towards NQS (from 53% in the previous quarter to 54% as at end June 2018). Victoria and New South Wales remain the only states with services rated by ACECQA as Significant Improvement Required, although the numbers have decreased since the previous quarter, reducing the overall proportion of services awarded this rating from 3.3% to 2.3%. Tasmania, Queensland and NSW are the states with the highest proportions of assessed services rated as Exceeding NQS, with 50%, 30% and 25% of services respectively.

There has been an overall increase in the proportion of total services assessed nationally since the last quarter (83% to 85%).

TABLE 8: NUMBER OF SERVICES BY OVERALL QUALITY RATING⁹ AND STATE AND TERRITORY AS AT 30 JUNE 2018.

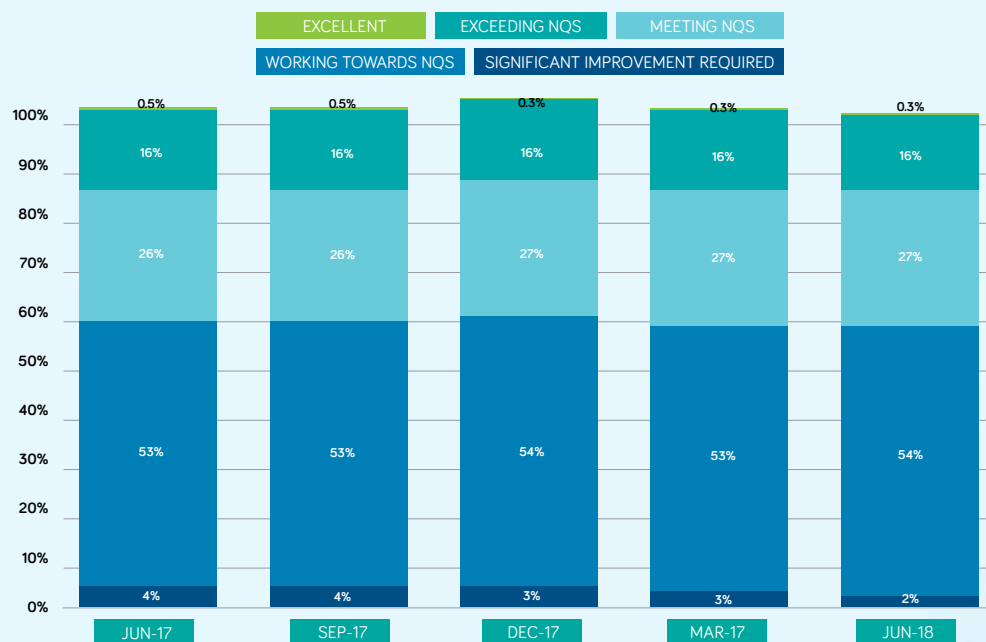
State	Excellent	Exceeding NQS	Meeting NQS	Working Towards NQS	Significant Improvement Required	Not yet assessed	Total	Assessed Services
ACT	0	1	3	3	0	7	14	50%
NSW	0	31	58	124	11	23	247	91%
NT	1	1	0	2	0	0	4	100%
QLD	1	31	38	32	0	17	119	86%
SA	0	1	2	6	0	6	15	60%
TAS	0	6	2	4	0	0	12	100%
VIC	0	28	69	153	4	55	309	82%
WA	0	6	5	23	0	2	36	94%
Total	2	105	177	347	15	110	756	85%

9 ACECQA National Register, as at 30 June 2018.

Figure 4 below indicates the proportion of family day care services by overall quality rating from 30 June 2017 to 30 June 2018.

The majority of approved family day care services (54%) continue to be rated by ACECQA as Working Towards the NQS, with the proportion of services rated as Meeting the NQS, Exceeding the NQS and Significant Improvement Required remaining largely unchanged over the past twelve months.

FIGURE 4: PROPORTION OF SERVICES BY OVERALL QUALITY RATING FROM 30 JUNE 2017 TO 30 JUNE 2018.





4.2 Quality Area Rating

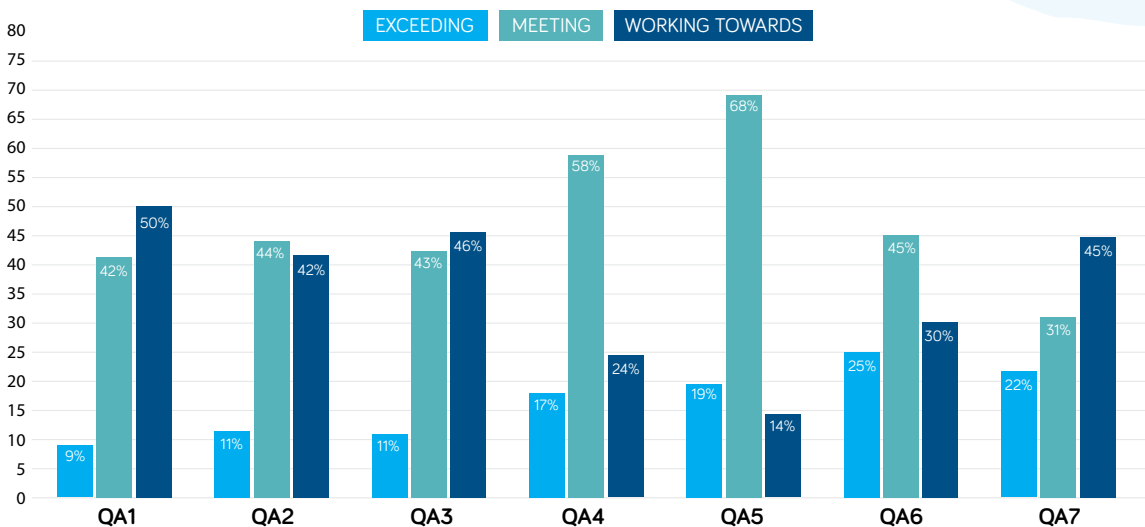
Figure 5 below shows service data by NQS Quality Area rating as provided by ACECQA at 30 June 2018.

The proportion of services rated Exceeding NQS has largely remained the same as for the March 2018 quarter across all Quality Areas.¹⁰

Based on ACECQA's Quality Area rating data, family day care services perform best¹¹ in QA6 (Collaborative Partnerships with Families and Communities), QA4 (Staffing Arrangements), and QA5 (Relationships with Children): 70 % are rated either Meeting NQS or Exceeding NQS in QA6; 76% of services fall within these rating categories in QA4; and 84% meet these benchmarks in QA5.

As can be seen in Figure 5, more than half of all assessed family day care services are rated as either Meeting NQS or Exceeding NQS for each NQS Quality Area. Across the seven categories, the two Quality Areas displaying the highest proportion of Exceeding NQS ratings are awarded in QA6 (25%) and QA7 (22%). These proportions are unchanged from the previous quarter.

FIGURE 5: SERVICE QUALITY AREA RATING¹² AS AT 30 JUNE 2018.



¹⁰ Please see the March 2018 edition of the Family Day Care Sector Profile at <http://www.familydaycare.com.au/representing-you/sector-profile>.

¹¹ This performance measure is based on the three Quality Areas with the highest percentages when combining the Meeting NQS and Exceeding NQS Quality Area ratings.

¹² 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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