



FAMILY DAY CARE AUSTRALIA

FAMILY DAY CARE SECTOR PROFILE

MARCH 2018



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1. Overview

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

The report consolidates and analyses a number of data sources (including FDCA internal member data², 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 2017 quarter to the March 2018 quarter, however the primary focus of the analysis relates to the changes between the December 2017 quarter and the March 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.

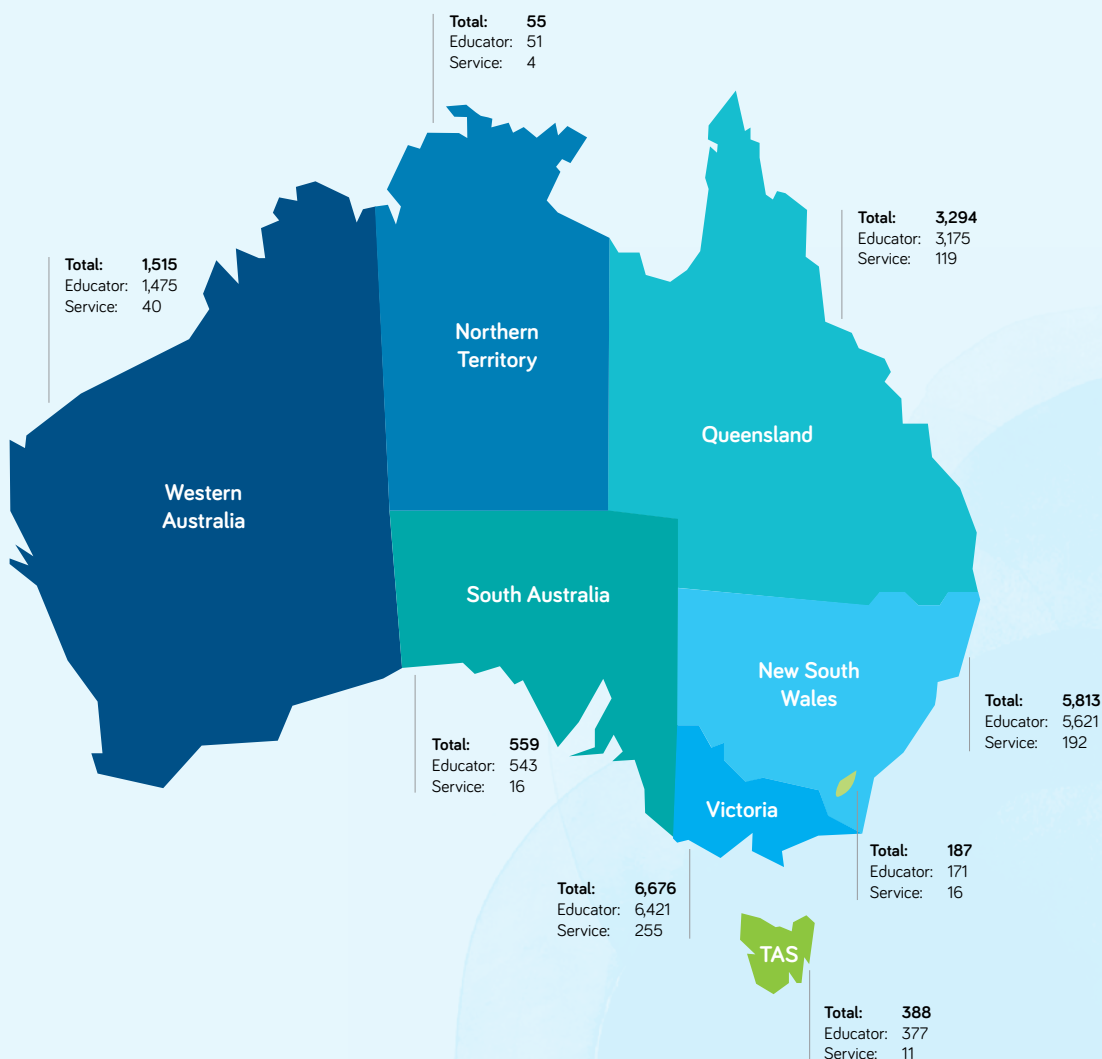
2. State of the Sector

Figure 1 below presents the total number of FDCA members, both services and educators, by state and territory, as at 31 March 2018.

The total number of family day care services and educators across Australia is 653 and 17,834 respectively.

Victoria has the largest family day care community with 255 services and 6,421 educators, and the Northern Territory has the smallest with 4 services and 51 educators.

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



2.1 Educator Member Numbers

Table 1 below outlines the total member numbers of family day care educators by state and territory from 31 March 2017 to 31 March 2018.

In line with the general trend over 2016 and 2017, there continued to be a decrease (3.8%) in total educator numbers nationally, from the December 2017 quarter to the March 2018 quarter, although this has slowed somewhat since last report. Similarly, all states and territories showed decreases in educator numbers. The greatest proportional decline in educator numbers in the last quarter occurred in the Australian Capital Territory (7.6%) with a decrease of 14 educators. The next highest proportional decrease occurred in South Australia (7%), with a decline of 41 educators. Victoria suffered the most significant decline in actual educator numbers nationally (n=297), equating to 4.4% of all educator members in this state. This reflects the fact that Victoria retains the largest number of educators in any state or territory.

As outlined in the previous editions of the Family Day Care Sector Profile report, this continued downward trend in numbers of educators may be attributed to a number of changes to the child care payments legislative framework and associated compliance activity.

Victoria, New South Wales and Queensland continue to retain the largest proportion of family day care educator members, which equates to 85.3% of total educators between the three states.

TABLE 1: EDUCATOR MEMBER NUMBERS BY STATE AND TERRITORY FROM 31 MARCH 2017 TO 31 MARCH 2018.

State	Mar-17	Jun-17	Sep-17	Dec-17	Mar-18
Australian Capital Territory	201	204	197	185	171
New South Wales	6,762	6,581	6,157	5,829	5,621
Northern Territory	61	64	58	53	51
Queensland	3,634	3,499	3,370	3,256	3,175
South Australia	784	711	675	584	543
Tasmania	414	401	395	391	377
Victoria	8,182	7,724	7,098	6,718	6,421
Western Australia	1,691	1,633	1,565	1,525	1,475
Total	21,729	20,817	19,515	18,541	17,834

2.2 Educator Age

The age distribution of educator members from 31 March 2017 to 31 March 2018 is depicted in Table 2 and Figure 2 below.

From the December 2017 quarter to the March 2018 quarter there was a decrease in numbers in all educator age brackets.

During this reporting period, the largest proportional decreases occurred at both ends of the age range: in the <24 age group (11.6 %) and the 25-29 age group (8.1%) as well as the 60-64 and 65+ age brackets (3.5% and 6.1% respectively).

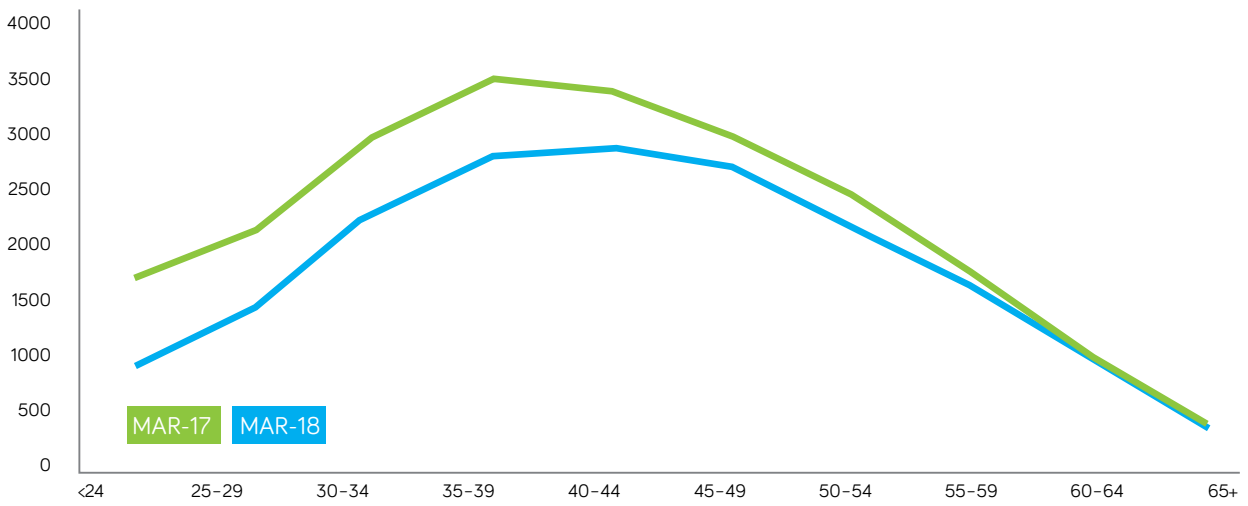
The age groups currently with the highest proportion of educator members are the 35-39 age bracket (15.3 % of all educator members), and the 40-44 age group (15.6%). After the age of 45, the numbers of educators in each age group start to decline more sharply, as can be seen in Figure 2.

TABLE 2: EDUCATOR MEMBER NUMBERS BY AGE FROM 31 MARCH 2017 TO 31 MARCH 2018.

Age	Mar-17	Jun-17	Sep-17	Dec-17	Mar-18
<24	1,690	1,555	1,282	1,064	941
25-29	2,068	1,902	1,699	1,571	1,444
30-34	2,911	2,772	2,533	2,309	2,241
35-39	3,393	3,227	3,007	2,867	2,737
40-44	3,259	3,102	3,000	2,836	2,775
45-49	2,875	2,834	2,736	2,657	2,620
50-54	2,375	2,285	2,180	2,157	2,102
55-59	1,721	1,703	1,649	1,650	1,605
60-64	1,007	1,020	1,020	1,005	970
65+	427	415	408	424	398
Not Available	3	2	1	1	1
Total	21,729	20,817	19,515	18,541	17,834



FIGURE 2: EDUCATOR MEMBER NUMBERS BY AGE AT 31 MARCH 2017 TO 31 MARCH 2018.



2.3 Service Member Numbers

Table 3 below outlines the total member numbers of family day care services by state and territory from 31 March 2017 to 31 March 2018.³

The last quarter saw a greater decline in total service member numbers (5.1%) compared with the previous quarter (2.7%). The largest proportional decrease in service numbers occurred in the Australian Capital Territory (11.1%) although the actual numbers were small (n=2). Victoria saw the largest decline in terms of actual numbers (n=31), which represented 10.8% of the state's service members. Service numbers in the Northern Territory remained static while Western Australia and New South Wales saw small declines of 2.4% and 1% respectively.

TABLE 3: SERVICE MEMBER NUMBERS BY STATE AND TERRITORY FROM 31 MARCH 2017 TO 31 MARCH 2018.

State	Mar-17	Jun-17	Sep-17	Dec-17	Mar-18
Australian Capital Territory	16	14	14	18	16
New South Wales	238	217	203	194	192
Northern Territory	6	3	3	4	4
Queensland	127	123	115	118	119
South Australia	29	23	20	15	16
Tasmania	12	12	11	12	11
Victoria	354	326	298	286	255
Western Australia	45	44	43	41	40
Total	827	762	707	688	653

³ 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 CCB approval.

3. Location

3.1 Remoteness Area

Educator members

Table 4 below provides a breakdown of educator members' location by remoteness area from 31 March 2017 to 31 March 2018.

Please note, the figures in Tables 4 and 5 are derived from the latest ABS data sets on remoteness,⁴ which are informed by data collected through the 2016 Census of Population and Housing. As a result of this change in data sets for Table 4, there appears to be some off trend movement for educator numbers in Major Cities and Inner Regional remoteness area categories. In previous quarters, movement in educator numbers primarily occurred in the Major Cities category, whereas in the March 2018 quarter the decrease in numbers has slowed in Major Cities and increased in Inner Regional areas. This may be simply due to reclassification of Inner Regional areas into Major Cities.

The number of educator members in the majority of remoteness categories has declined between December 2017 and March 2018, apart from the Remote Australia category which saw a slight increase of 2.7% (n=3) on the previous quarter. The largest decline in educator member numbers (6.8%) is evident in the Inner Regional category. Over this same period, there was a 3.3% decline in educator numbers within Major Cities, a 4.6% decline in Very Remote Australia, and declines of 6.8% and 2.1% in Inner Regional Australia and Outer Regional Australia respectively.

Despite the 3.8% decrease in total educator member numbers since the previous quarter, the remoteness profile of the family day care sector has not changed significantly. The vast majority (78.4%) of educators continued to reside within Major Cities of Australia. The proportion of educators residing in regional or remote areas (21.6%) remains largely the same as for the December 2017 quarter (21.3%). The percentage of educators residing in Remote Australia and Very Remote Australia has also remained largely static at 0.8%.

TABLE 4: EDUCATOR MEMBER NUMBERS BY REMOTENESS AREA FROM 31 MARCH 2017 TO 31 MARCH 2018.

Remoteness Area	Mar-17	Jun-17	Sep-17	Dec-17	Mar-18
Major Cities of Australia	17,291	16,486	15,325	14,457	13,984
Inner Regional Australia	3,060	2,999	2,912	2,838	2,646
Outer Regional Australia	1,203	1,163	1,116	1,090	1,067
Remote Australia	111	110	116	110	113
Very Remote Australia	28	25	21	22	21
Not Available	36	34	25	24	3
Total	21,729	20,817	19,515	18,541	17,834

⁴ ABS catalogue 1270.055.005 - Australian Statistical Geography Standard (ASGS): Volume 5 - Remoteness Structure, July 2016, released 16.3.2018; as opposed to ABS Cat. No. 1270.055.006 - Australian Statistical Geography Standard (ASGS): Postcode 2011 to Remoteness Area 2006, which was used in all previous editions of the FDCA Sector Profile reports.

Service members

Service member location data by remoteness area from 31 March 2017 to 31 March 2018 is presented in Table 5 below.⁵ Again, please note the updated data sets for remoteness, as mentioned above. However, there is no clear indication of significant off trend movement as is evident in the educator numbers.

The general downward trend in service member numbers in Major Cities of Australia has continued since December 2017, showing a small decrease of 5.4% over the last quarter. There was also a small decrease of 4.4% in service member numbers in Inner Regional areas; however numbers of services in Outer Regional and Very Remote Australia remained static. The largest proportional decrease in service members (20%) occurred in Remote Australia, although in actual numbers this equated to a decline of just one service.

The proportion of services located in regional or remote areas remained relatively unchanged at 21.9% of total services in the March 2018 quarter, compared to 21.4% in the December 2017 quarter.

TABLE 5: SERVICE MEMBER NUMBERS BY REMOTENESS AREA FROM 31 MARCH 2017 TO 31 MARCH 2018.

Remoteness Area	Mar-17	Jun-17	Sep-17	Dec-17	Mar-18
Major Cities of Australia	672	616	562	539	510
Inner Regional Australia	94	91	90	92	88
Outer Regional Australia	51	47	47	49	49
Remote Australia	7	6	6	5	4
Very Remote Australia	2	2	2	2	2
Not Available	1	0	0	1	0
Total	827	762	707	688	653

⁵ 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 the distribution of educator members by relative socio-economic disadvantage from 31 March 2017 to 31 March 2018.⁶

Since the last quarterly report, there has been quite a bit of movement across some deciles, as highlighted in the discussion below. However, this can largely be attributed to the distribution of educator member numbers for March 2018 being based on the latest ABS data sets on socio-economic indexes (released 27 March 2018), which are informed by data collected through the 2016 Census of Population and Housing.

The most significant changes can be seen in the distribution of educator members across deciles 1, 2 and 6. In the March 2018 quarter, the highest proportion of educators occurs in decile 6 areas (15.4% of educator members) rather than the decile 1 category, which was previously the case. The proportion of educator members residing in areas ranked as decile 1 has decreased by around 4 percentage points from 16.2% to 12.6% and the proportion of educators in decile 2 areas has increased by around 2 percentage points from 9.5% in the December 2017 quarter to 11.7% in the March 2018 quarter.

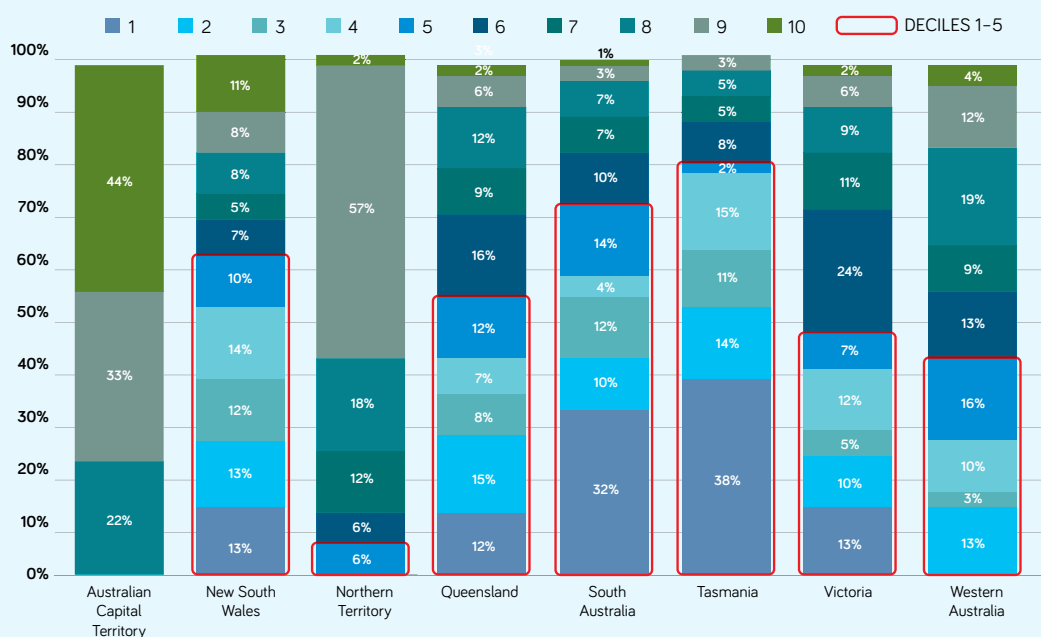
Despite the movements outlined above, the proportion of educator members residing in decile 1 and 2 areas has not changed significantly over the last quarter (25.7% as at December 2017 compared to 23.4% as at March 2018). In addition, over half (52.9%) of all educator members continue to reside in areas that are ranked in the first five deciles of highest socio-economic disadvantage, down slightly from 55.8% in the December 2017 quarter. However this is not reflected across all states and territories as depicted in Figure 3 below. The states with a majority 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%.

TABLE 6: EDUCATOR MEMBER NUMBERS BY RELATIVE SOCIO-ECONOMIC DISADVANTAGE FROM 31 MARCH 2017 TO 31 MARCH 2018

Index of Relative Socio-economic Disadvantage	Mar-17	Jun-16	Sep-17	Dec-17	Mar-18
1	4,151	3855	3,381	3,006	2,252
2	2,139	2031	1,886	1,766	2,085
3	2,127	1989	1,860	1,765	1,408
4	2,409	2330	2,190	2,090	2,024
5	1,968	1891	1,791	1,721	1,667
6	2,683	2625	2,519	2,426	2,747
7	1,929	1853	1,765	1,718	1,526
8	1,695	1662	1,598	1,560	1,815
9	1,539	1501	1,461	1,428	1,307
10	1,046	1039	1,033	1,029	993
Not Available	43	41	31	32	10
Total	21,729	20817	19,515	18,541	17,834

⁶ For March 2018 onwards - ABS catalogue 2033.0.55.001 - 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 31 MARCH 2018.



Service members

Table 7 below depicts service member numbers by relative socio-economic disadvantage from 31 March 2017 to 31 March 2018.⁷ Similar to the socio-economic distribution of educator members, the decile with the highest representation of services is decile 6, with 14% of services, followed closely by deciles 1 and 2 (deciles of highest socio-economic disadvantage) with 13.3% of service members each.

Over half (53.9%) of family day care services continue to be located in areas that are categorised under the five deciles of highest socio-economic disadvantage, and there has only been a slight downward movement in the proportion of services located in decile 1 and 2 areas as at March 2018 (26.6%) compared to the December 2017 quarter (29%). However, as noted above, a significant contributing factor is the use of the latest ABS data sets on socio-economic indexes, which are informed by data collected through the 2016 Census of Population and Housing.

TABLE 7: SERVICE MEMBER NUMBERS BY SOCIO-ECONOMIC DISADVANTAGE FROM 31 MARCH 2017 TO 31 MARCH 2018.

Index of Relative Socio-economic Disadvantage	Mar-17	Jun-16	Sep-17	Dec-17	Mar-18
1	188	170	145	135	87
2	88	78	66	65	87
3	81	78	76	79	61
4	90	85	80	79	63
5	64	59	60	59	54
6	104	95	91	89	92
7	75	68	64	61	67
8	52	47	47	46	58
9	48	50	44	44	49
10	30	26	26	24	35
Not Available	7	6	8	7	0
Total	827	762	707	688	653

⁷ For March 2018 onwards - ABS catalogue 2033.0.55.001 - 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 FDCA's 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 31 March 2018. It also includes numbers of services yet to be assessed.

Since the December 2017 quarter, there has been a positive movement, albeit small, in numbers of services rated 'Exceeding NQS' (n=+1 in Western Australia) and 'Meeting NQS' (n=+1 in Victoria). The states with the highest proportion of services rated Exceeding NQS continue to be Queensland (25%) and Northern Territory (25%).

Victoria and New South Wales remain the only states with services rated by ACECQA as Significant Improvement Required. The number of services with this rating in Victoria has decreased by one since the previous quarter. In NSW the number has remained unchanged.

There has been an overall increase in the proportion of total services assessed nationally since the last quarter (81% to 83%). Western Australia and the Northern Territory have the largest proportion of services assessed (100% each), followed by Tasmania (93%).

TABLE 8: NUMBER OF SERVICES BY OVERALL QUALITY RATING⁸ AND STATE AND TERRITORY AS AT 31 MARCH 2018.

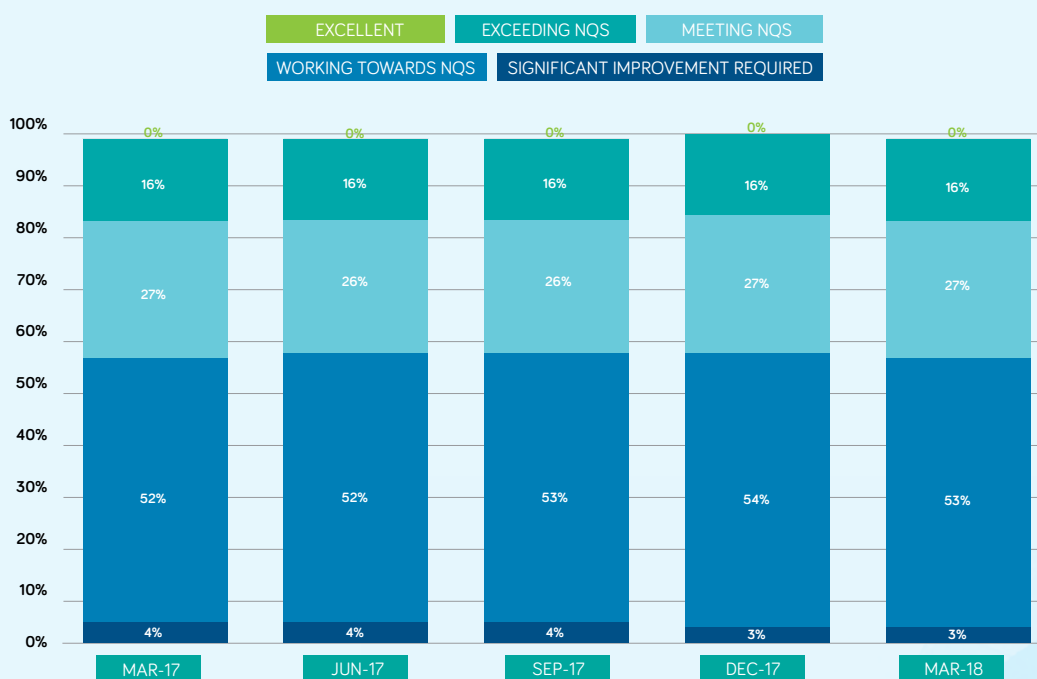
State	Excellent	Exceeding NQS	Meeting NQS	Working Towards NQS	Significant Improvement Required	Not yet assessed	Total	Assessed Services
ACT	0	1	3	3	0	6	13	54%
NSW	0	30	59	116	15	39	259	85%
NT	1	1	0	2	0	0	4	100%
QLD	1	32	39	33	0	23	128	82%
SA	0	1	2	6	0	6	15	60%
TAS	0	6	2	5	0	1	14	93%
VIC	0	32	72	160	7	64	335	81%
WA	0	6	5	28	0	0	39	100%
Total	2	109	182	353	22	139	807	83%

8 ACECQA National Register, as at 31 March 2018.

Figure 4 below indicates the proportion of family day care services by overall quality rating from 31 March 2017 to 31 March 2018.

The majority of approved family day care services (53%) 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 12 months.

FIGURE 4: PROPORTION OF SERVICES BY OVERALL QUALITY RATING FROM 31 MARCH 2017 TO 31 MARCH 2018.





4.2 Quality Area Rating

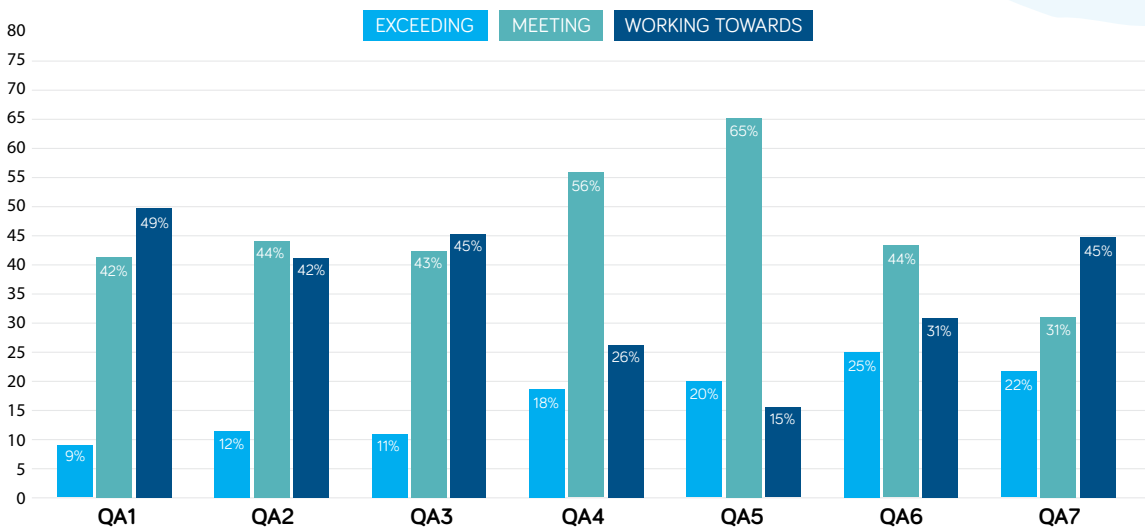
Figure 5 below shows service data by NQS Quality Area rating as provided by ACECQA at 31 March 2018.

The proportion of services rated Exceeding NQS has largely remained the same as for the December 2017 quarter across all Quality Areas.⁹

Based on ACECQA's Quality Area rating data, family day care services perform best¹⁰ in QA6 (Collaborative Partnerships with Families and Communities), QA4 (Staffing Arrangements), and QA5 (Relationships with Children): 69% are rated either Meeting NQS or Exceeding NQS in QA6; 74% of services fall within these rating categories in QA4; and 85% meet these benchmarks in QA5.

More than half of all family day care services are rated as either Meeting NQS or Exceeding NQS across all NQS Quality Areas. Across the seven categories, the two Quality Areas displaying the highest proportion of Exceeding NQS ratings are awarded in QA6 (25%) and QA7 (22%).

FIGURE 5: SERVICE QUALITY AREA RATING¹¹ AS AT 31 MARCH 2018.



⁹ Please see the December 2017 edition of the Family Day Care Sector Profile at <http://www.familydaycare.com.au/representing-you/sector-profile>.

¹⁰ 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.

¹¹ 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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