



FAMILY DAY CARE AUSTRALIA

# FAMILY DAY CARE SECTOR PROFILE

SEPTEMBER 2018



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# 1. Overview

This report is Family Day Care Australia's (FDCA) eighth quarterly report profiling the family day care sector.<sup>1</sup>

The report consolidates and analyses a number of data sources (including FDCA internal member data,<sup>2</sup> the Australian Children's Education and Care Quality Authority 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.<sup>3</sup>

Information in this report is presented from the September 2017 quarter to the September 2018 quarter, however the primary focus of the analysis relates to the changes between the June 2018 quarter and the September 2018 quarter.



## 1.1 About Family Day Care Australia

FDCA 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 FDCA go to [familydaycare.com.au](http://familydaycare.com.au)

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

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

<sup>3</sup> Due to rounding, individual percentages in the tables and figures may not add up to 100%.

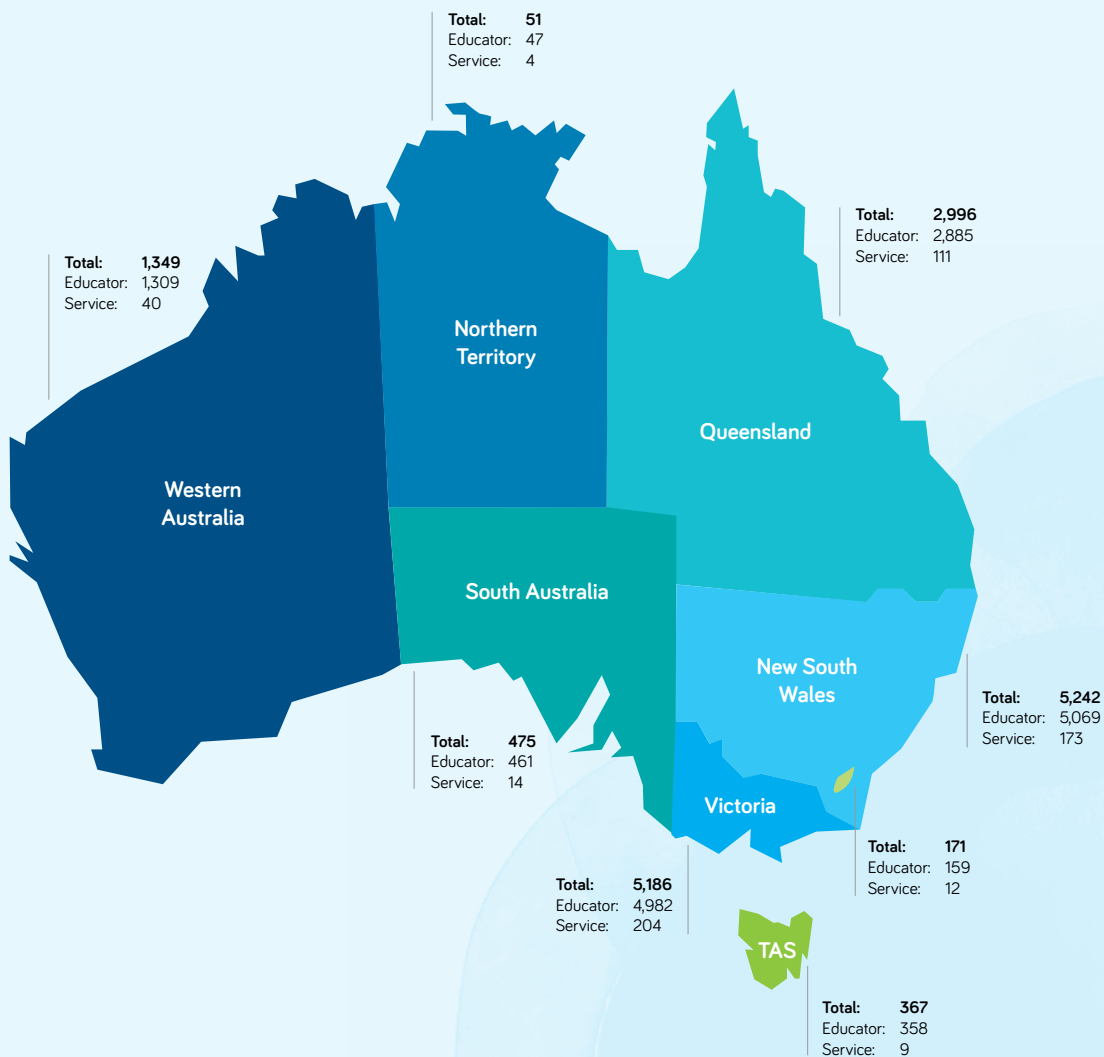
## 2. State of the Sector

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

The total number of family day care services and educators across Australia is 567 and 15,270 respectively.

Victoria has the largest family day care community with 204 services and 4,982 educators, and the Northern Territory has the smallest with 4 services and 47 educators.

**FIGURE 1: NUMBER OF CURRENT FDCA MEMBERS AS AT 30 SEPTEMBER 2018.**



## 2.1 Educator Member Numbers

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

New South Wales, Victoria and Queensland continue to retain the largest proportion of family day care educator members, representing 84.7% of total educator members across the three states.

Over the last quarter from June 2018 to September 2018, there continued to be a decrease in total numbers of educator members nationally (7.4%), as well as declines of varying magnitude across all states and territories. This is consistent with the general trend since 2016, and similar to the downward movement in national numbers noted in the June 2018 Sector Profile Report (7.5%). The greatest proportional decrease in educator numbers in the last quarter occurred in Victoria (12.6%) with a decline of 720 educators. The next largest proportional decreases occurred in South Australia (7.2%), representing a decline of 36 educators, followed by New South Wales and Queensland (4.2%), with declines of 220 and 146 educators respectively.

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 Child Care Package<sup>4</sup> and ongoing compliance enforcement activity by the Australian Government. FDCA is deeply concerned that this ongoing trend of declining educator numbers is a result of legitimate providers being caught in a draconian and poorly targeted compliance enforcement regime.

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

State	Sep-17	Dec-17	Mar-18	Jun-18	Sep-18
Queensland	3,370	3,256	3,175	3,031	2,885
New South Wales	6,157	5,829	5,621	5,289	5,069
Australian Capital Territory	197	185	1,71	167	159
Victoria	7,098	6,718	6,421	5,702	4,982
Tasmania	395	391	377	359	358
South Australia	675	584	543	497	461
Western Australia	1,565	1,525	1,475	1,403	1,309
Northern Territory	58	53	51	50	47
<b>Total</b>	<b>19,515</b>	<b>18,541</b>	<b>17,834</b>	<b>16,498</b>	<b>15,270</b>

<sup>4</sup> See [www.education.gov.au/ChildCarePackage](http://www.education.gov.au/ChildCarePackage)

## 2.2 Educator Age

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

Over the past quarter from June 2018 to September 2018, there was a decrease in numbers in all educator age brackets, with the three largest proportional decreases occurring in the <24 age group (22.7%), the 25-29 age bracket (15.3%), and the 30-34 age group (11.8%).

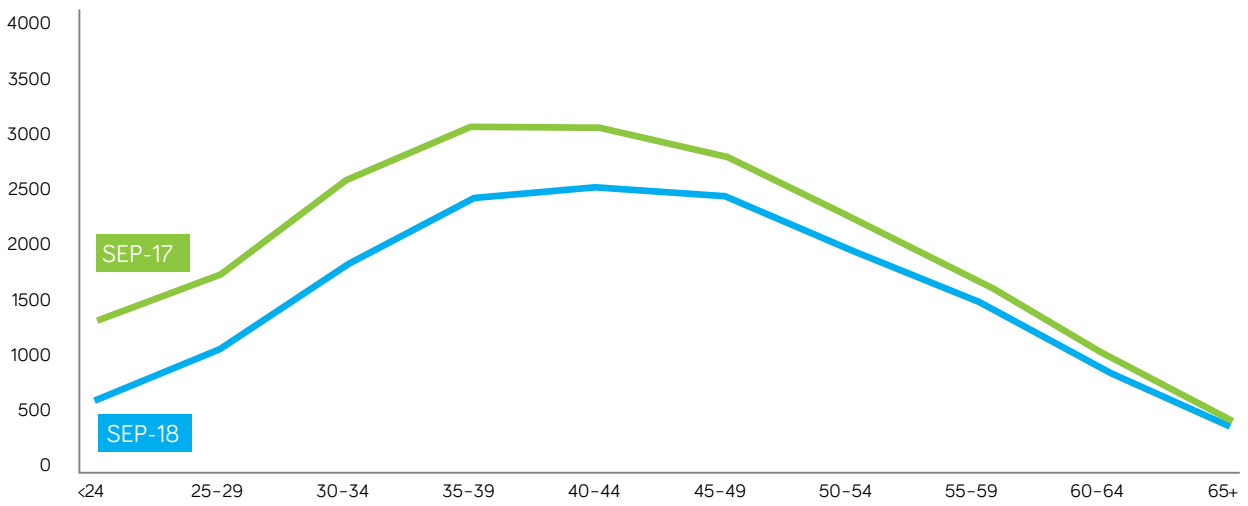
As at 30 September 2018, the age groups with the highest proportion of educator members remain the 35-39 age bracket (15.5% of all educator members), the 40-44 age group (16.1%) and the 45-49 age group (15.6%), showing little variation from the last quarter. Similarly, after the age of 50, the number of educators in each age group declines more sharply, as can be seen in Figure 2.

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

Age	Sep-17	Dec-17	Mar-18	Jun-18	Sept-18
<24	1,282	1,064	941	776	600
25-29	1,699	1,571	1,444	1,228	1,040
30-34	2,533	2,309	2,241	2,030	1,791
35-39	3,007	2,867	2,737	2,534	2,373
40-44	3,000	2,836	2,775	2,577	2,461
45-49	2,736	2,657	2,620	2,523	2,380
50-54	2,180	2,157	2,102	1,967	1,904
55-59	1,649	1,650	1,605	1,551	1,475
60-64	1,020	1,005	970	936	882
65+	408	424	398	376	364
Not Available	1	1	1	0	0
<b>Total</b>	<b>19,515</b>	<b>18,541</b>	<b>17,834</b>	<b>16,498</b>	<b>15,270</b>



**FIGURE 2: EDUCATOR MEMBER NUMBERS BY AGE AT 30 SEPTEMBER 2017 TO 30 SEPTEMBER 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 September 2017 to 30 September 2018.<sup>5</sup>

The last quarter from 30 June 2018 to 30 September 2018 saw a decline in total service member numbers of 7.05%. This compares with 6.6% in the previous quarter. The largest proportional decrease in service numbers occurred in the Australian Capital Territory (14.3%) although the actual numbers were small (n=2). The next largest proportional decrease in service members occurred in Victoria with a decline of 10.9%, representing a decline of 25 services. Tasmania also saw a decline of a similar proportion (10%), however this represented a decrease of only one service. Service numbers in South Australia and the Northern Territory remained the same as for the past quarter.

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

State	Sep-17	Dec-17	Mar- 18	Jun-18	Sept-18
Queensland	115	118	119	116	111
New South Wales	203	194	192	182	173
Australian Capital Territory	14	18	16	14	12
Victoria	298	286	255	229	204
Tasmania	11	12	11	10	9
South Australia	20	15	16	14	14
Western Australia	43	41	40	41	40
Northern Territory	3	4	4	4	4
<b>Total</b>	<b>707</b>	<b>688</b>	<b>653</b>	<b>610</b>	<b>567</b>

<sup>5</sup> 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 September 2017 to 30 September 2018.<sup>6</sup>

Consistent with the overall drop in educator members, the number of educators in all remoteness categories, except for Very Remote Australia, declined between the end of June 2018 and end of September 2018. The largest proportional decline in educator member numbers (9.1%) occurred within the Major Cities category, with a decrease of 1,169 educators. Over this reporting period, there was no change in number of educators located in Outer Regional Australia, however those located in Remote Australia fell slightly by 6.3% (n=7). The number of educators located in Very Remote Australia saw a small increase in actual numbers of 2, or 11.1%.

Despite the 7.4% decrease in total educator member numbers since the previous quarter, and some movements across most categories, the remoteness profile of the family day care sector has not changed significantly. The vast majority (76.6%) of educators continued to reside within the Major Cities of Australia, which was largely unchanged from the previous reporting period (78%). The overall proportion of educators residing in Inner and Outer Regional areas (22.5%) remained essentially the same as at end of June 2018 (21.2%), and the percentage of educators residing in Remote Australia and Very Remote Australia showed almost no change at 0.8%.

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

Remoteness Area	Sep-17	Dec-17	Mar-18	Jun-18	Sept-18
Major Cities of Australia	15,325	14,457	13,984	12,870	11,701
Inner Regional Australia	2,912	2,838	2,646	2,505	2,447
Outer Regional Australia	1,116	1,090	1,067	992	992
Remote Australia	116	110	113	112	105
Very Remote Australia	21	22	21	18	20
Not Available	25	24	3	1	5
<b>Total</b>	<b>19,515</b>	<b>18,541</b>	<b>17,834</b>	<b>16,498</b>	<b>15,270</b>

<sup>6</sup> 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 September 2017 to 30 September 2018 is presented in Table 5 below.<sup>7</sup>

The general downward trend in service member numbers in the Major Cities of Australia continued over the last quarter, showing a decline of 44 services, representing a 9.4% decrease since the previous quarter. Otherwise there was minimal or no variation in numbers of services located in regional and remote areas since the June 2018 Sector Profile Report.

Additionally, the proportion of services located in Major Cities of Australia has continued to decline slightly over the last quarter, now representing 74.8% of all services, down from 76.7%, whereas the proportion of services located in regional or remote areas has continued to increase slightly, now representing 24.7% of total service members, up from the previous quarter (23.3%).

**TABLE 5: SERVICE MEMBER NUMBERS BY REMOTENESS AREA FROM 30 SEPTEMBER 2017 TO 30 SEPTEMBER 2018**

Remoteness Area	Sep-17	Dec-17	Mar-18	Jun-18	Sept-18
Major Cities of Australia	562	539	510	468	424
Inner Regional Australia	90	92	88	88	87
Outer Regional Australia	47	49	49	47	46
Remote Australia	6	5	4	5	5
Very Remote Australia	2	2	2	2	2
Not Available	0	1	0	0	3
<b>Total</b>	<b>707</b>	<b>688</b>	<b>653</b>	<b>610</b>	<b>567</b>

<sup>7</sup> ABS catalogue 1270.0.55.005 - 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 number of educator members by relative socio-economic disadvantage from 30 September 2017 to 30 September 2018.<sup>8</sup>

Variations in the distribution of educator members over the June - September 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% compared to 23.9% as at end of June 2018.

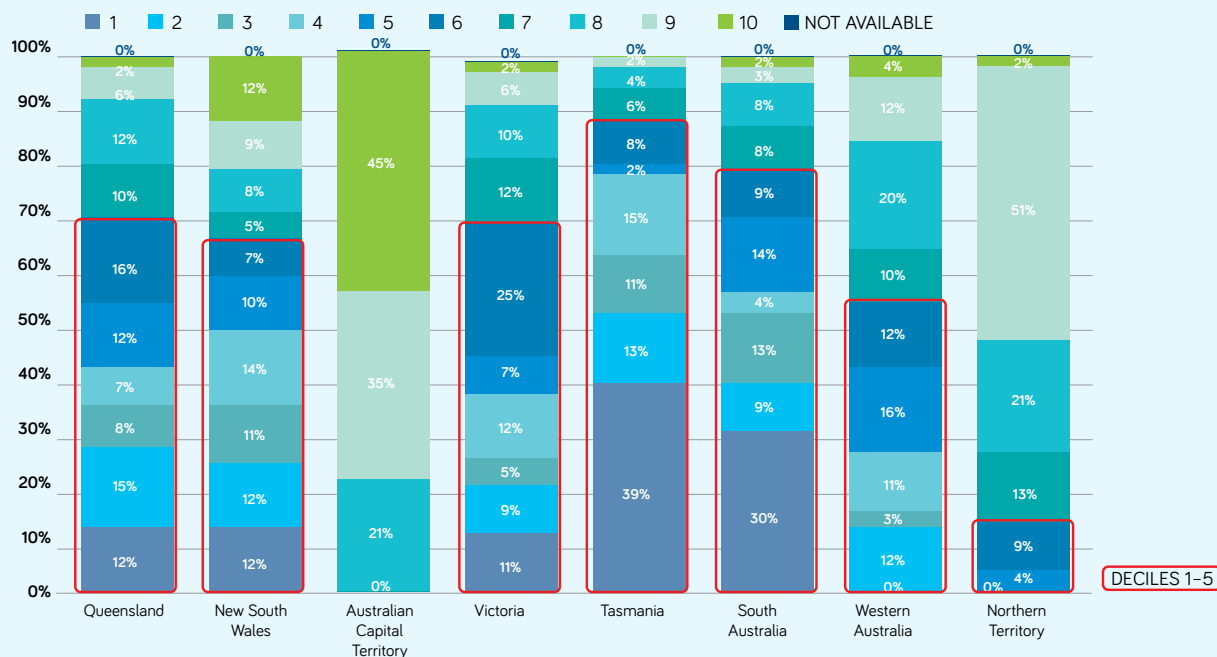
Similarly, over half (51.7%) of all educator members nationally resided in areas that are ranked within the first five deciles of highest socio-economic disadvantage, which is almost the same proportion as in the previous quarter (52.2%). However this distribution is not consistent across all states 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 (70%), New South Wales (59%), and Queensland (54%), with Victoria sitting at 44%. These proportions are similar to the previous quarter, despite small movements in actual member numbers nationally. Tasmania continues to stand out as the state with the largest proportion of educators (39%) residing in areas ranked as Decile 1 locations.

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

Index of Relative Socio-economic Disadvantage	Sep-17	Dec-17	Mar-18	Jun-18	Sept-18
1	3,381	3,006	2,252	2,033	1,792
2	1,886	1,766	2,085	1,907	1,752
3	1,860	1,765	1,408	1,285	1,196
4	2,190	2,090	2,024	1,875	1,724
5	1,791	1,721	1,667	1,522	1,425
6	2,519	2,426	2,747	2,548	2,329
7	1,765	1,718	1,526	1,396	1,310
8	1,598	1,560	1,815	1,707	1,608
9	1,461	1,428	1,307	1,261	1,200
10	1,033	1,029	993	953	922
Not Available	31	32	10	11	12
<b>Total</b>	<b>19,515</b>	<b>18,541</b>	<b>17,834</b>	<b>16,498</b>	<b>15,270</b>

<sup>8</sup> 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 30 SEPTEMBER 2018.**



### Service members

Table 7 below depicts service member distribution by relative socio-economic disadvantage from 30 September 2017 to 30 September 2018.<sup>9</sup>

As with the distribution of educators, despite some movements in actual numbers, there has been little change in the proportions of services according to relative socio-economic disadvantage since the last reporting period.

During this reporting period, the deciles with the highest representation of services are deciles 1 and 6, with 12.8% of services each, followed closely by decile 2 with 12.5% of service members. Just over a quarter of service members (25.4%) continue to be located within deciles 1 and 2 (the two highest areas of socio-economic disadvantage), virtually unchanged from the previous quarter (25.9%). Over half (53.4%) of family day care services continue to be located in areas categorised under the five deciles of highest socio-economic disadvantage. This represents a marginal decrease on the previous quarter (54.6%).

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

Index of Relative Socio-economic Disadvantage	Sep-17	Dec-17	Mar-18	Jun-18	Sept-18
1	145	135	87	84	73
2	66	65	87	74	71
3	76	79	61	61	55
4	80	79	63	59	55
5	60	59	54	55	49
6	91	89	92	84	73
7	64	61	67	63	58
8	47	46	58	52	46
9	44	44	49	46	49
10	26	24	35	32	31
Not Available	8	7	0	0	7
<b>Total</b>	<b>707</b>	<b>688</b>	<b>653</b>	<b>610</b>	<b>567</b>

<sup>9</sup> 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 FDCA's Family Day Care Sector Profile Report provides insights into performance of family day care services under the National Quality Framework, drawing on data provided by ACECQA.

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

The majority of approved family day care services (54%) continue to be rated by ACECQA as Working Towards the NQS, remaining largely unchanged over the past quarter.

Since the June 2018 quarter, there have been some slight changes in the proportion nationally of assessed services rated as Excellent (now 0.2%, previously 0.3%), Exceeding the NQS (now 15%, previously 16%) and Meeting the NQS (now 29%, previously 27%).

Looking over the past 12 months there have been slight improvements in the reduction of the overall proportion of services requiring significant improvement (4% down to 1.8%) and an increase in the number of services rated as Meeting the NQS (from 26% up to 29%).

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

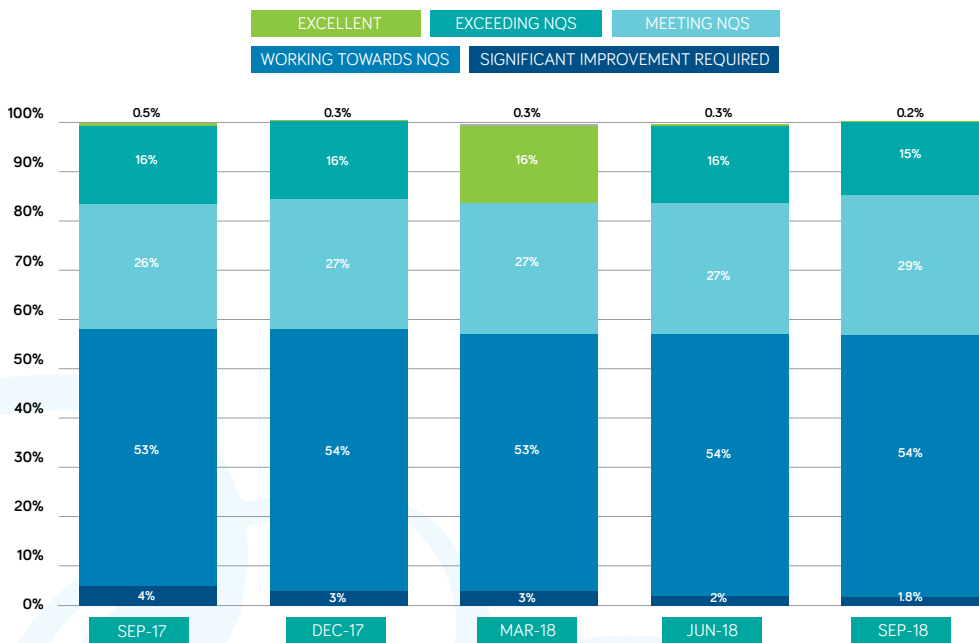


Table 8 below depicts the number of assessed family day care services by overall quality rating and state or territory as at 30 September 2018. It also includes numbers of services yet to be assessed.

In the June to September 2018 quarter Queensland is the only state where a service has been awarded an overall Excellent rating; the states and territories with the highest proportions of assessed services rated as Exceeding NQS are Tasmania, Queensland and the Northern Territory, with 45.5%, 26.9% and 25% of services in these three states respectively. New South Wales and Victoria are the only states with services rated by ACECQA as Significant Improvement Required, representing 4.5% and 0.4% of assessed services in those states.

There has been a marginal increase in the proportion of total services assessed nationally since the last quarter (85% to 86%).

**TABLE 8: NUMBER OF SERVICES BY OVERALL QUALITY RATING<sup>10</sup> AND STATE AND TERRITORY AS AT 30 SEPTEMBER 2018.**

State	Excellent	Exceeding NQS	Meeting NQS	Working Towards NQS	Significant Improvement Required	Not yet assessed	Total	Assessed Services
ACT	0	1	4	3	0	4	12	67%
NSW	0	22	61	126	10	25	244	90%
NT	0	1	1	2	0	0	4	100%
QLD	1	28	39	36	0	11	115	90%
SA	0	1	2	9	0	1	13	92%
TAS	0	5	2	4	0	0	11	100%
VIC	0	26	67	129	1	54	277	81%
WA	0	6	4	24	0	6	40	85%
<b>Total</b>	<b>1</b>	<b>90</b>	<b>180</b>	<b>333</b>	<b>11</b>	<b>101</b>	<b>716</b>	<b>86%</b>

<sup>10</sup> ACECQA National Register, as at 30 June 2018.



## 4.2 Quality Area Rating

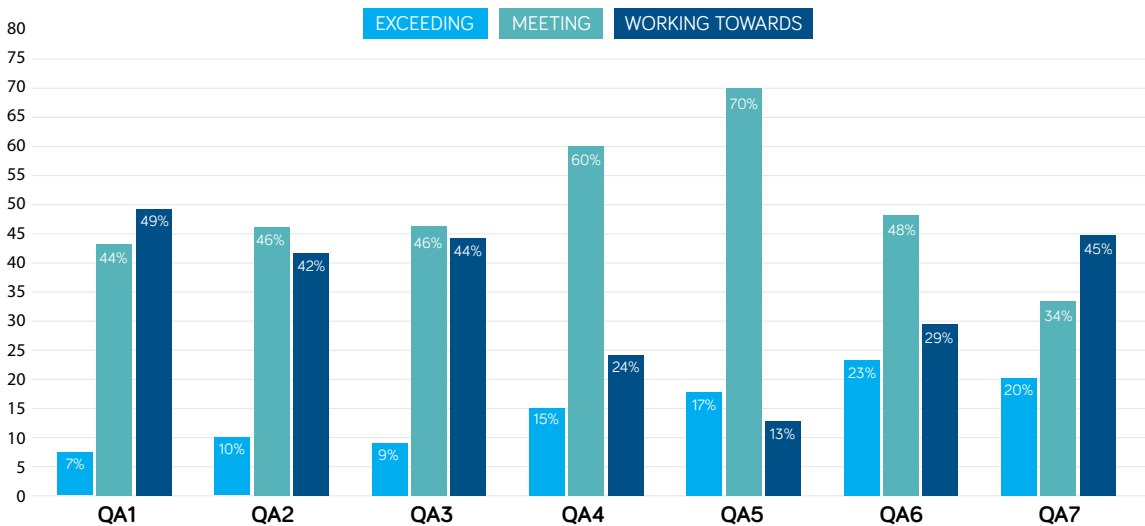
Figure 5 below shows service data by NQS Quality Area rating as provided by ACECQA at 30 September 2018. Supplementary data and analysis on the education and care sector as a whole is available in ACECQA's NQF Snapshot report for Q3 2018.<sup>11</sup>

As can be seen below, more than half of all assessed family day care services are rated as either Meeting NQS or Exceeding NQS for each NQS Quality Area, similar to results in the previous quarter. The proportion of services rated as Exceeding NQS in each Quality Area has also largely remained the same as for the June - September 2018 quarter.<sup>12</sup>

Based on ACECQA's Quality Area rating data, family day care services continue to perform best<sup>13</sup> in QA5 (Relationships with Children), QA4 (Staffing Arrangements), and QA6 (Collaborative Partnerships with Families and Communities): 87% are rated either Meeting NQS or Exceeding NQS in QA5; 74% of services fall within these rating categories in QA4; and 71% meet these benchmarks in QA6.

Across the seven categories, the two Quality Areas where the highest proportion of Exceeding NQS ratings are awarded are in QA6 (23%) and QA7 (20%). These proportions are largely the same as for the previous quarter.

**FIGURE 5: SERVICE QUALITY AREA RATING<sup>14</sup> AS AT 30 SEPTEMBER 2018.**



<sup>11</sup> See [www.acecqa.gov.au/nqf/snapshots](http://www.acecqa.gov.au/nqf/snapshots)

<sup>12</sup> Please see the March 2018 edition of the FDCA Family Day Care Sector Profile Report at <http://www.familydaycare.com.au/representing-you/sector-profile>.

<sup>13</sup> 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.

<sup>14</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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ABN 93 094 436 021  
PO Box 571, Gosford, NSW 2250  
Web: [www.fdca.com.au](http://www.fdca.com.au)

For more information about this report please contact:  
Scott Rollason, General Manager  
Phone: 02 4320 1132  
Email: [scott.rollason@fdca.com.au](mailto:scott.rollason@fdca.com.au)

