



FAMILY DAY CARE AUSTRALIA

# Family Day Care Sector Profile

DECEMBER 2017

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## OVERVIEW

This report is Family Day Care Australia's (FDCA) fifth 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 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 December 2016 quarter to the December 2017 quarter, however the primary focus of the analysis relates to the changes between the September 2017 quarter and the December 2017 quarter.

<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.

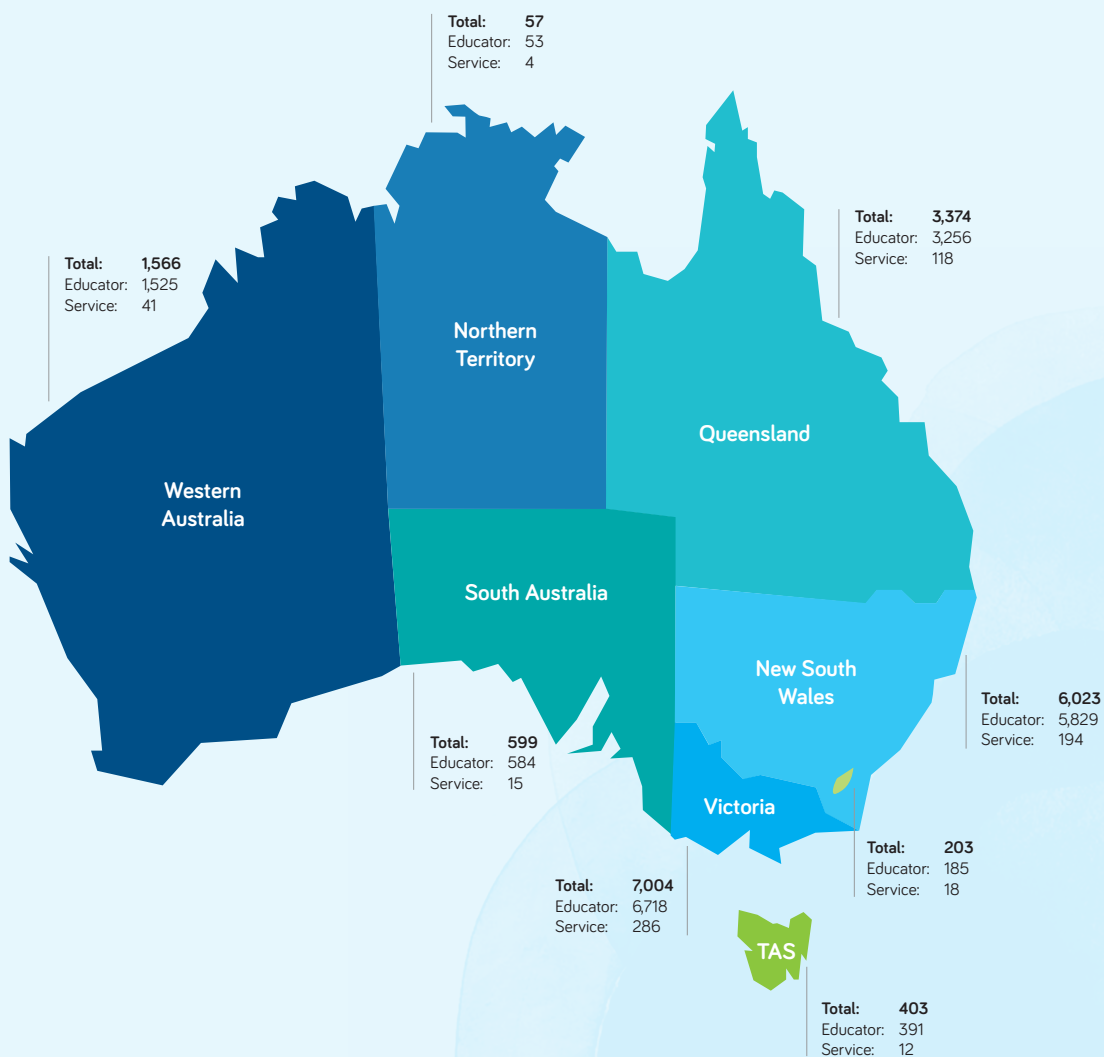
# STATE OF THE SECTOR

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

The total number of family day care services and educators across Australia is 688 and 18,541 respectively.

Victoria has the largest family day care community with 286 services and 6,718 educators, and the Northern Territory is the smallest with 4 services and 53 educators.

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



## EDUCATOR MEMBER NUMBERS

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

In line with the general trend across 2016 to 2017, there continued to be a decrease (5%) in total educator numbers nationally, from the September 2017 quarter to the December 2017 quarter. Similarly, all states and territories showed decreases in educator numbers between these quarters. The greatest proportional decline in educator numbers in the last quarter occurred in South Australia (13.48%), with a decrease of 91 educators. The next highest proportional decrease occurred in the Northern Territory (8.6%), although the actual decrease was only 5 educators. Victoria suffered the most significant decline in actual educator numbers nationally (n= 380), equating to 5.4% of all educator members in this state.

As outlined in the previous edition of the Family Day Care Sector Profile, this continued downward trend in the number of educators may be attributed to a number of changes to the child care payments legislative framework in order to facilitate greater levels of compliance within the sector.

New South Wales, Queensland and Victoria continue to retain the largest family day care educator numbers, which equates to 85.2 % of total educators between the three states.

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

State	Dec-16	Mar-17	Jun-17	Sep-17	Dec-17
Queensland	3,775	3,634	3,499	3,370	3,256
New South Wales	6,974	6,762	6,581	6,157	5,829
Australian Capital Territory	207	201	204	197	185
Victoria	8,396	8,182	7,724	7,098	6,718
Tasmania	426	414	401	395	391
South Australia	863	784	711	675	584
Western Australia	1,726	1,691	1,633	1,565	1,525
Northern Territory	65	61	64	58	53
<b>Total</b>	<b>22,432</b>	<b>21,729</b>	<b>20,817</b>	<b>19,515</b>	<b>18,541</b>

## SERVICE MEMBER NUMBERS

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

The last quarter saw a modest decline in total service member numbers (2.7%) compared with the previous quarter. This was due to small increases in the number of family day care services from September 2017 to December 2017 in Queensland (n=+3), the Australian Capital Territory (n=+4), Tasmania (n=+1) and the Northern Territory (n=+1). The largest proportional decrease in service numbers occurred in South Australia (25%), although the actual numbers were relatively small (n=5). Service numbers in Western Australia, New South Wales, and Victoria also declined by 4.7%, 4.4% and 4% respectively.

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

State	Dec-16	Mar-17	Jun-17	Sep-17	Dec-17
Queensland	127	127	123	115	118
New South Wales	245	238	217	203	194
Australian Capital Territory	14	16	14	14	18
Victoria	351	354	326	298	286
Tasmania	12	12	12	11	12
South Australia	27	29	23	20	15
Western Australia	49	45	44	43	41
Northern Territory	6	6	3	3	4
<b>Total</b>	<b>831</b>	<b>827</b>	<b>762</b>	<b>707</b>	<b>688</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 members' location by remoteness area<sup>4</sup> from December 2016 to December 2017.

The number of educators in all remoteness categories has declined between September 2017 and December 2017, apart from the Very Remote Australia category which saw a slight increase of 4.8% (n=1). Over this same period, there was a 5.7% decline in educator numbers within Major Cities, a 5.2% decline in Remote Australia, and small declines of 2.5% and 2.3% in Inner Regional Australia and Outer Regional Australia respectively.

Despite the 5% 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 (77.9%) of educators continued to reside within Major Cities of Australia. The number of educators residing in regional or remote areas (21.9%) remains largely the same as for the June 2017 – September 2017 quarter (21.3 %). The percentage of educators residing in Remote Australia and Very Remote Australia has remained static at 0.7%.

**TABLE 3:** EDUCATOR MEMBER NUMBERS BY REMOTENESS AREA FROM 31 DECEMBER 2016 TO 31 DECEMBER 2017.

Remoteness Area	Dec-16	Mar-17	Jun-17	Sep-17	Dec-17
Major Cities of Australia	17,861	17,291	16,486	15,325	14,457
Inner Regional Australia	3,101	3,060	2,999	2,912	2,838
Outer Regional Australia	1,261	1,203	1,163	1,116	1,090
Remote Australia	130	111	110	116	110
Very Remote Australia	36	28	25	21	22
Not Available	43	36	34	25	24
<b>Total</b>	<b>22,432</b>	<b>21,729</b>	<b>20,817</b>	<b>19,515</b>	<b>18,541</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 location data by remoteness area from 31 December 2016 to 31 December 2017.

The general downward trend in member service numbers in major cities continued in the December 2017 quarter, showing a small decrease of 4.1% on the previous quarter. There were small increases in member service numbers in Inner Regional and Outer Regional areas of 2.2% and 4.3% respectively, and numbers of services in Very Remote Australia remained static. The largest proportional decrease in member services (16.67%) occurred in Remote Australia, although in actual numbers this equated to a decline of just one service.

A total of 21.4 % of member services are located in regional or remote areas at 31 December 2017, up from 20.5% in the September 2017 quarter.

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

Remoteness Area	Dec-16	Mar-17	Jun-17	Sep-17	Dec-17
Major Cities of Australia	676	672	616	562	539
Inner Regional Australia	92	94	91	90	92
Outer Regional Australia	47	51	47	47	49
Remote Australia	5	7	6	6	5
Very Remote Australia	1	2	2	2	2
Not Available	10	1	0	0	1
<b>Total</b>	<b>831</b>	<b>827</b>	<b>762</b>	<b>707</b>	<b>688</b>



## SOCIO-ECONOMIC DISADVANTAGE

### Educator

Table 5 illustrates educator member numbers by socio-economic disadvantage decile from 31 December 2016 to 31 December 2017.<sup>5</sup>

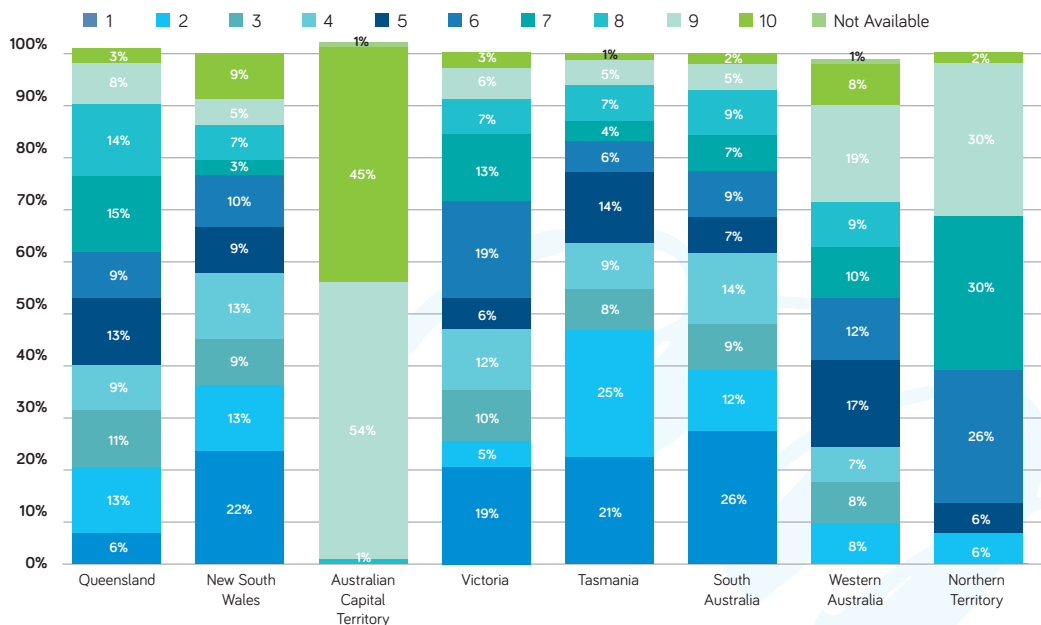
In the December 2017 quarter, the category with the highest number of educators (16.2%) has continued to be the decile 1 category, which represents areas with the highest level of socio-economic disadvantage. While numbers in this decile have decreased by 11.09% from the previous quarter, the overall proportion of educators within the decile 1 category has only decreased marginally (1.1%).

Over half (55.8%) 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 56.9% in the September 2017 quarter. However this is not reflected across all states and territories as depicted in Figure 2 below.

**TABLE 5: EDUCATOR MEMBER NUMBERS BY SOCIO-ECONOMIC DISADVANTAGE FROM 31 DECEMBER 2016 TO 31 DECEMBER 2017.**

Index of Relative Socio-economic Disadvantage	Dec-16	Mar-17	Jun-17	Sep-17	Dec-17
1	4379	4,151	3,855	3,381	3,006
2	2223	2,139	2,031	1,886	1,766
3	2199	2,127	1,989	1,860	1,765
4	2481	2,409	2,330	2,190	2,090
5	2007	1,968	1,891	1,791	1,721
6	2775	2,683	2,625	2,519	2,426
7	2001	1,929	1,853	1,765	1,718
8	1694	1,695	1,662	1,598	1,560
9	1550	1,539	1,501	1,461	1,428
10	1074	1,046	1,039	1,033	1,029
Not Available	49	43	41	31	32
<b>Total</b>	<b>22432</b>	<b>21,729</b>	<b>20,817</b>	<b>19,515</b>	<b>18,541</b>

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



<sup>5</sup> ABS Cat. No. 2033.0.55.001 Census of Population and Housing: Socio-Economic Indexes for Areas (SEIFA), Australia, 2011

## Service

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

Similar to the socio-economic distribution of educator members, the decile with the highest representation of services is decile 1 (highest socio-economic disadvantage) which retains 19.6% of services.

Over half (60.6%) of services are located in areas that are categorised under the five deciles of highest socio-economic disadvantage.

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

Index of Relative Socio-economic Disadvantage	Dec-16	Mar-17	Jun-17	Sep-17	Dec-17
1	195	188	170	145	135
2	90	88	78	66	65
3	71	81	78	76	79
4	85	90	85	80	79
5	62	64	59	60	59
6	111	104	95	91	89
7	76	75	68	64	61
8	50	52	47	47	46
9	44	48	50	44	44
10	31	30	26	26	24
Not Available	16	7	6	8	7
<b>Total</b>	<b>831</b>	<b>827</b>	<b>762</b>	<b>707</b>	<b>688</b>

<sup>6</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 2017 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 onwards.



# EDUCATOR AGE

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

From the September 2017 quarter to the December 2017 quarter there was a decrease in all educator age ranges, apart from the 55-59 age range which saw a marginal increase of one educator (0.06%) and the 60-64 age group which saw an increase of 16 (3.9%).

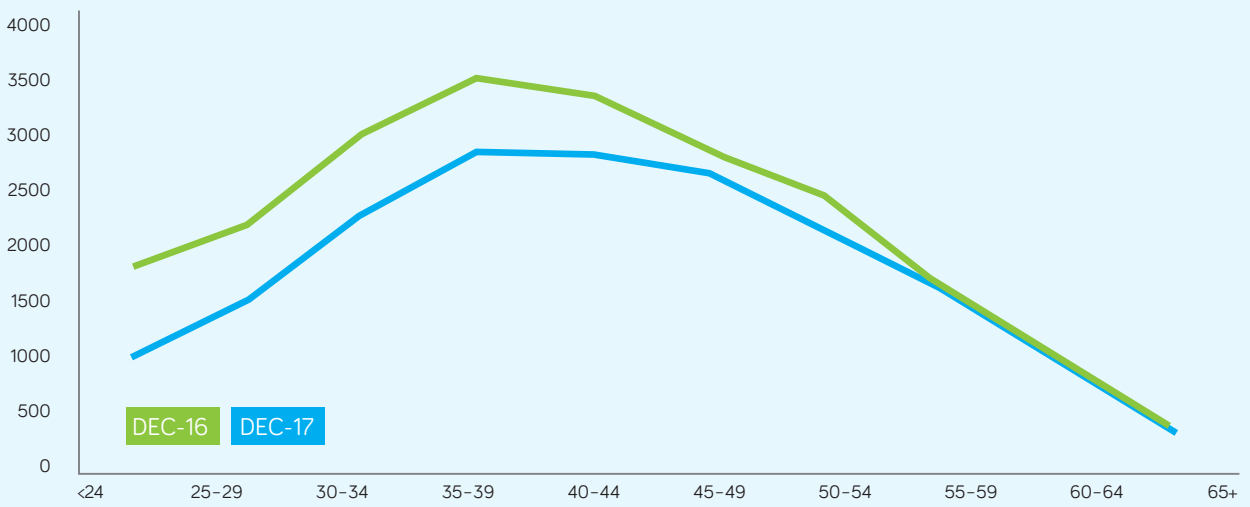
The largest proportional decreases occurred in the <24 age range (17%), the 30-34 age range (8.8%) and the 25-29 age range (7.5%) during this reporting period.

The highest proportion of educators (within a single age bracket) remains in the 35-39 age range (15.5% of all educator members).

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

Age	Dec-16	Mar-17	Jun-17	Sep-17	Dec-17
<24	1,838	1,690	1,555	1,282	1,064
25-29	2,217	2,068	1,902	1,699	1,571
30-34	3,014	2,911	2,772	2,533	2,309
35-39	3,512	3,393	3,227	3,007	2,867
40-44	3,360	3,259	3,102	3,000	2,836
45-49	2,858	2,875	2,834	2,736	2,657
50-54	2,473	2,375	2,285	2,180	2,157
55-59	1,691	1,721	1,703	1,649	1,650
60-64	1,044	1,007	1,020	1,020	1,005
65+	423	427	415	408	424
Not Available	2	3	2	1	1
<b>Total</b>	<b>22,432</b>	<b>21,729</b>	<b>20,817</b>	<b>19,515</b>	<b>18,541</b>

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





# SERVICE QUALITY RATING

## OVERALL QUALITY RATING

This last 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 December 2017. It also includes numbers of services yet to be assessed.

The states with the highest proportion of services rated Exceeding NQS are Queensland (25%) and Northern Territory (20%).

Victoria and New South Wales remain the only two states with services rated by ACECQA as Significant Improvement Required. However the number of services with this rating in both states has decreased since the previous quarter, albeit by small amounts (Victoria n=1 and New South Wales n=3).

There has been an overall increase in the proportion of total services assessed nationally since the last quarter (78% to 81%). Western Australia has the largest proportion of services assessed (98%) followed by Tasmania (93%).

**TABLE 8: NUMBER OF SERVICES BY OVERALL QUALITY RATING<sup>7</sup> AND STATE AND TERRITORY AS AT 31 DECEMBER 2017.**

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	118	15	48	270	82%
NT	1	1	0	2	0	1	5	80%
QLD	1	32	38	32	0	25	128	80%
SA	0	1	2	6	0	9	18	50%
TAS	0	6	2	5	0	1	14	93%
VIC	0	32	71	169	8	67	347	81%
WA	0	5	6	28	0	1	40	98%
<b>Total</b>	<b>2</b>	<b>108</b>	<b>181</b>	<b>363</b>	<b>23</b>	<b>158</b>	<b>835</b>	<b>81%</b>

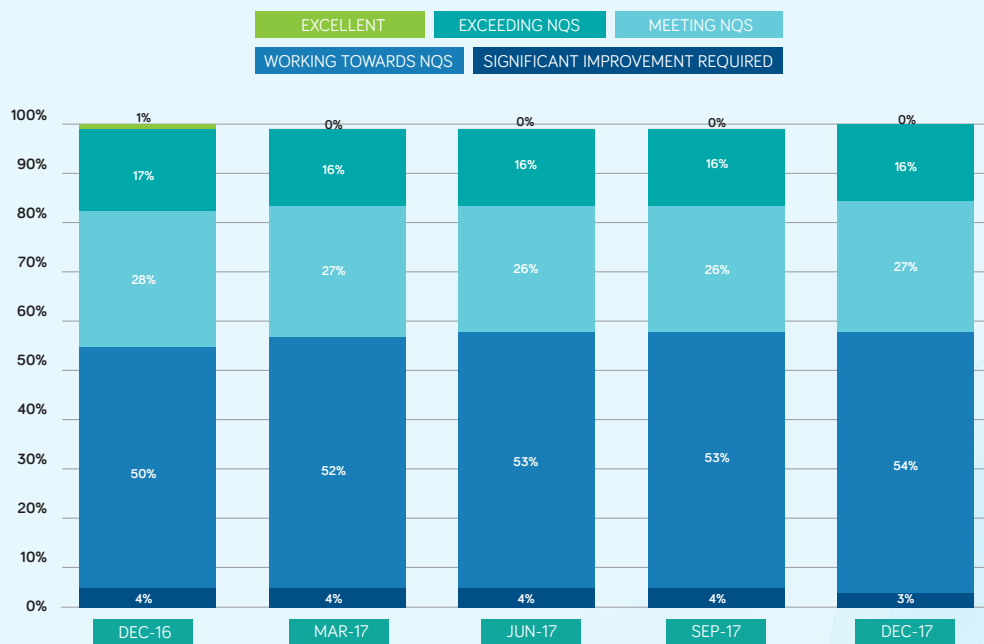
<sup>7</sup> ACECQA National Register, as at 31 December 2017.

Figure 4 below indicates the proportion of family day care services by overall quality rating from 31 December 2016 to 31 December 2017.

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 or Exceeding the NQS remaining largely unchanged over the past 12 months.

Despite a slight decrease in the proportion of services rated Meeting NQS and Exceeding NQS from the December 2016 quarter to the December 2017 quarter, the proportion of services in all quality rating areas has not fluctuated significantly from the September 2017 quarter.

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





## QUALITY AREA RATING

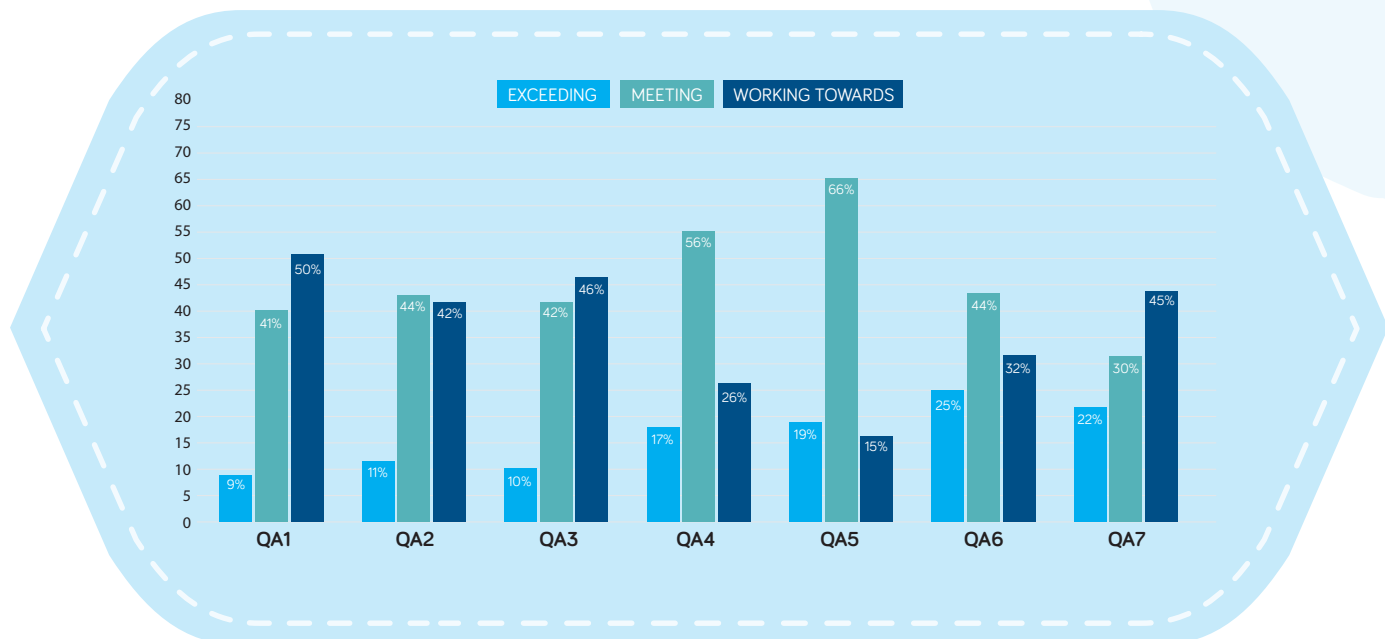
Figure 5 below shows service data by NQS Quality Area rating as provided by ACECQA at 31 December 2017.

The proportion of services rated Exceeding NQS has largely remained the same as for the September 2017 quarter across all Quality Areas.<sup>8</sup>

Based on ACECQA's Quality Area rating data, family day care services perform best<sup>9</sup> 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 ; 73% of services fall within these rating categories in QA4; and 85% meet these benchmarks in QA5.

A majority of all family day care services are rated as either Meeting NQS or Exceeding NQS across all NQS Quality Areas apart from QA1 (50%). 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 RATING<sup>10</sup> AS AT 31 DECEMBER 2017.**



<sup>8</sup> Please see the September 2017 edition of the Family Day Care Sector Profile at <http://www.familydaycare.com.au/representing-you/sector-profile>.

<sup>9</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>10</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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