



FAMILY DAY CARE AUSTRALIA

Family Day Care Sector Profile

DECEMBER 2016



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OVERVIEW

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

The report consolidates and analyses a number of data sources (including FDCA internal member data¹, 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 is presented from all quarters throughout 2016, however the primary focus of the analysis relates to the December 2016 quarter.

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

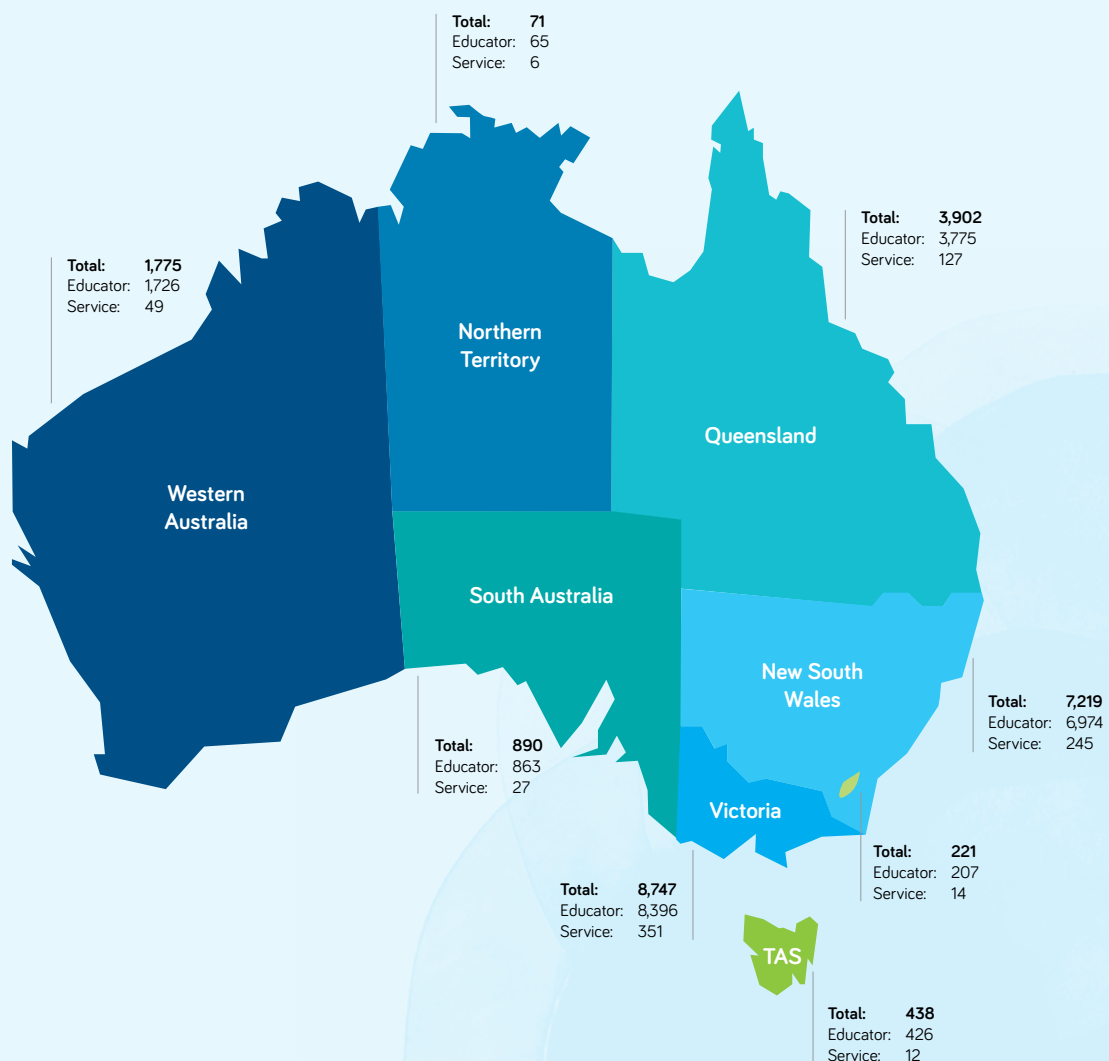
FDCA MEMBER NUMBERS

Figure 1 below presents the number of FDCA members, both services and educators, by state and territory, as at 31 December 2016.

The total number of family day care services and educators across Australia is 831 and 22,432 respectively.

Victoria has the largest family day care community with 351 services and 8,396 educators, and the Northern Territory is the smallest with 6 services and 65 educators.

FIGURE 1: NUMBER OF CURRENT FAMILY DAY CARE AUSTRALIA MEMBERS AS AT 31 DECEMBER 2016.





EDUCATOR MEMBER NUMBERS

Table 1 below outlines the total number of family day care educators by state and territory across all four quarters in 2016.

In all states and territories, apart from Western Australia, there has been a slight downward trend in educator numbers across 2016 (3.4%). The most pronounced decline between quarters occurred from the September 2016 quarter to the December 2016 quarter (2.6%), which may be partially attributed to seasonality, given that the figures were sourced on 31 December 2016, a period whereby many educators have ceased working for the calendar year. An additional contributing factor to this trend may be attributed to a number of legislative instruments that commenced over this period which made additional changes to the child care payments legislative framework and aimed to facilitate greater levels of compliance within the sector.

As would be expected, the three most populous states (New South Wales, Queensland and Victoria) retain the largest family day care educator numbers, which equates to 85.3% of total educators between the three states.

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

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

SERVICE MEMBER NUMBERS

Table 2 below outlines the total number of family day care services by state and territory across all four quarters in 2016.²

Contrary to the apparent downward trend in educator numbers, service numbers in all states and territories either increased or remained relatively static throughout 2016, with an overall increase of 9.2%. The most pronounced increases occurred in New South Wales (10.9%) and in Victoria (11.1%).

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

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

² 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.

In the December 2016 quarter the vast majority (79.6%) of educators reside within Major Cities of Australia. 13.8% reside in Inner Regional areas and 5.6% are located in Outer Regional Australia with 0.7% of educators reside in Remote or Very Remote areas.

There was a 3.5% decline in educator numbers within Major Cities across the four quarters, which is comparable to the overall decline in educator numbers (3.4%) across the sector throughout 2016. Proportionately and between individual quarters, the most significant decline in numbers again was from the September 2016 quarter to the December 2016 quarter within Major Cities at 2.8%.

In total 20.2% of educators reside in regional or remote areas – this percentage remained relatively consistent across 2016.

TABLE 3: EDUCATOR MEMBER NUMBERS BY REMOTENESS AREA³ FROM 31 MARCH 2016 TO 31 DECEMBER 2016.

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

³ 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 December 2016.

There has been an increase in service numbers across the four quarters (9.2%) which can be primarily attributed to an increase in service numbers within Major Cities, which increased by 13% over this period. However, there was a minor decrease in service numbers in Major Cities from the September 2016 quarter to the December 2016 quarter.

A total of 17.4% of services are located in regional or remote areas in December 2016.

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

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

SOCIO-ECONOMIC DISADVANTAGE

Educator

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

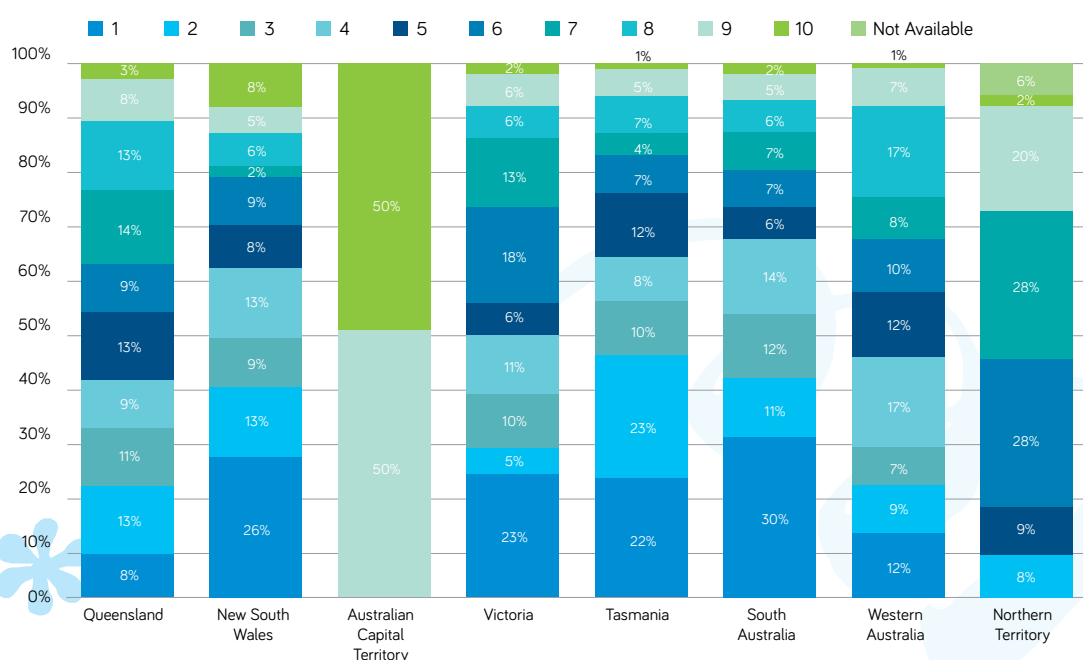
In the December 2016 quarter, the decile with the highest representation of educator numbers, at 19.5%, is the decile 1 category, which represents areas with the highest level of socio-economic disadvantage.

Over half (59.2%) of educators reside in areas that are in the five deciles of highest socio-economic disadvantage.

TABLE 5: EDUCATOR MEMBER NUMBERS BY SOCIO-ECONOMIC DISADVANTAGE⁴ 31 MARCH 2016 TO 31 DECEMBER 2016 USING AUSTRALIAN RANKING.

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

FIGURE 2: EDUCATOR MEMBER NUMBERS BY SOCIO-ECONOMIC DISADVANTAGE AND STATE AND TERRITORY AS AT 31 DECEMBER 2016 USING AUSTRALIAN RANKING.



⁴ 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 socio-economic disadvantage from 31 March 2016 to 31 December 2016.

Similar to the socio-economic distribution of educators, the decile with the highest representation of services is decile 1 which retains 23.5% of services. Additionally, virtually mirroring the educator distribution, the majority (60.5%) of services are located in areas that are in the five deciles of highest socio-economic disadvantage in December 2016.

Numbers of services increased or remained static in all decile categories throughout 2016, apart from those located in decile 7 and 9 areas, which decreased slightly in numbers.

TABLE 6: SERVICE MEMBER NUMBERS BY SOCIO-ECONOMIC DISADVANTAGE 31 MARCH 2016 TO 31 DECEMBER 2016 USING AUSTRALIAN RANKING.

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



EDUCATOR

AGE

Table 7 below illustrates FDCA educator member numbers by age from 31 March 2016 to 31 December 2016.

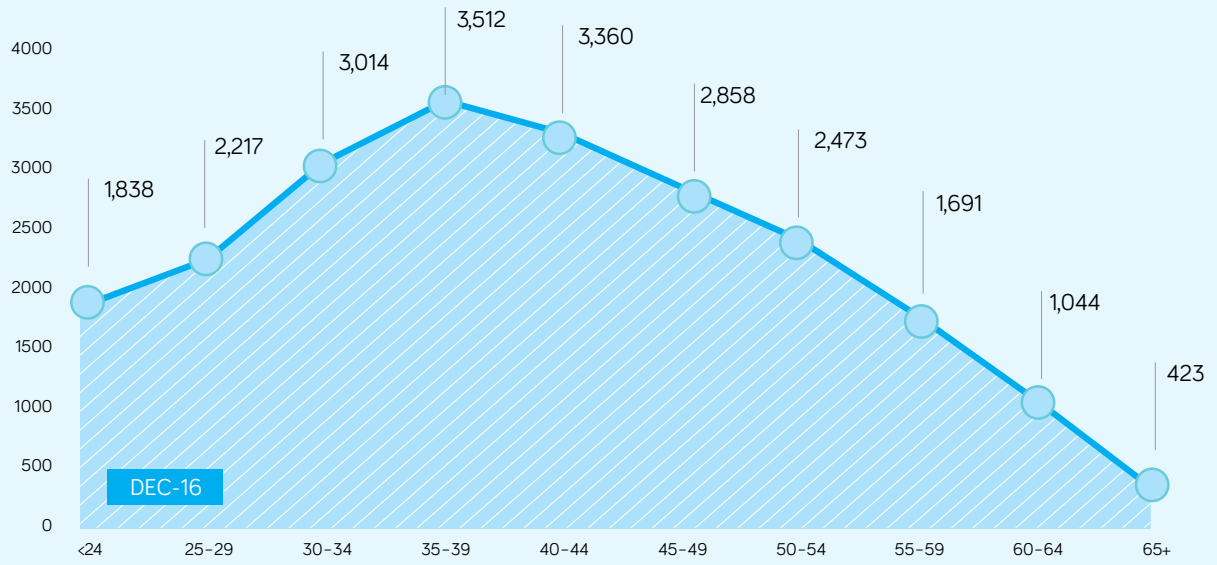
In the December 2016 quarter, 44.1% of educators fell within the 30-44 age range. The age range at this time with the highest number of educators was the 35-39 range, which makes up 15.7% of total educators. The median age falls within 40-44 category.

Across the collection period from March 2016 to December 2016, minor increases can be observed in the 50-54, 60-64 and 65+ age ranges, though numbers in all other ranges have declined which again reflects the general overall decline in educator number across 2016. As expected, the most significant proportional decline between individual quarters in most categories is from the September 2016 to December 2016 quarters.

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

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

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





SERVICE

OVERALL QUALITY RATING

Table 8 below depicts the number of services by overall quality rating and state as at 31 December 2016.

The majority of services in the Australian Capital Territory (76.5%), New South Wales (62.8%) and South Australia (82.9%) were not yet assessed at this time. Tasmania had the largest number of services assessed (86%), followed by the Northern Territory (80%).

Queensland retained two of the three total Excellent rated services and 34.1% of assessed Queensland services were rated Exceeding the National Quality Standard (NQS). 50% of assessed services in Tasmania were rated Exceeding the NQS.

The proportion of assessed services rated Meeting the NQS was 39.8% in Queensland, 31.6% in New South Wales and 26.5% in Victoria. Victoria and New South Wales were the only two states that had services rated Significant Improvement required, at 5.4% and 4.5% of assessed services respectively.

TABLE 8: NUMBER OF SERVICES BY OVERALL QUALITY RATING⁵ AND STATE AS AT 31 DECEMBER 2016.

State	Not yet assessed	Significant Improvement Required	Working Towards NQS	Meeting NQS	Exceeding NQS	Excellent	Total	Assessed Services
ACT	13	0	2	1	1	0	17	24%
NSW	225	6	63	42	22	0	358	37%
NT	1	0	2	0	1	1	5	80%
QLD	58	0	21	35	30	2	146	60%
SA	29	0	6	0	0	0	35	17%
TAS	2	0	4	2	6	0	14	86%
VIC	94	15	156	74	34	0	373	75%
WA	26	0	23	4	2	0	55	53%
Total	448	21	277	158	96	3	1,003	55%

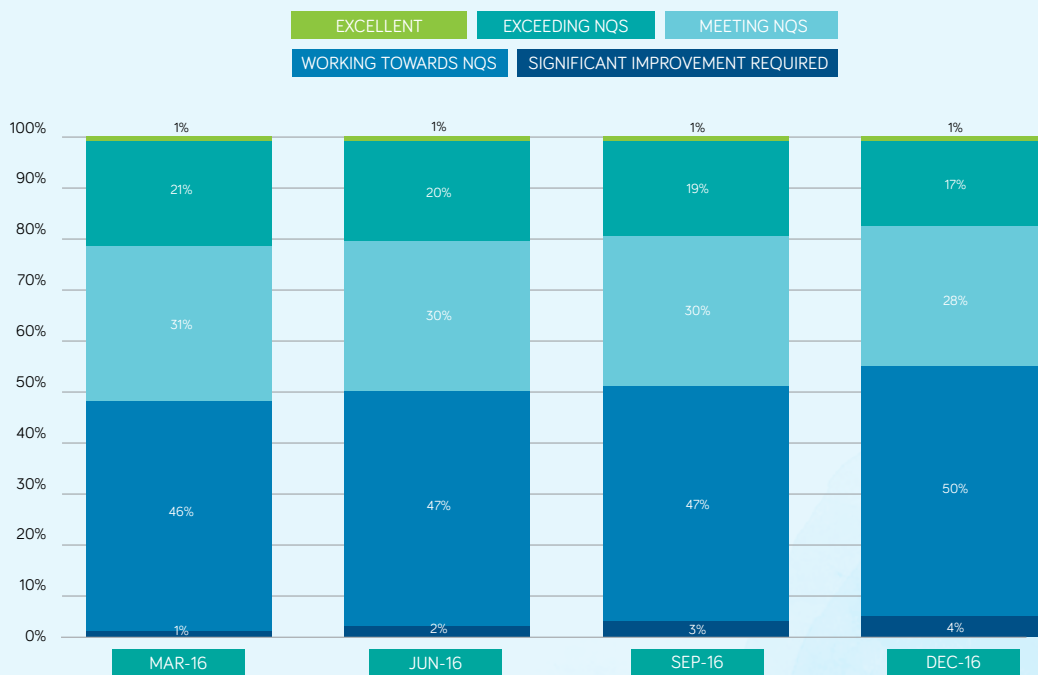
⁵ ACECQA National Register, as at 31 December 2016.

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

The proportion of services in each quality area remains relatively consistent across the four quarters, though there is a decline in the proportion of services rated Exceeding NQS (from 21% to 17%) and an increase in the proportion of services rated Working Towards NQS (from 46% to 50%).

There is an incremental increase of 1% per quarter of services rated significant improvement required.

FIGURE 4: PROPORTION OF SERVICE BY OVERALL QUALITY AREA 31 MARCH 2016 TO 31 DECEMBER 2016.





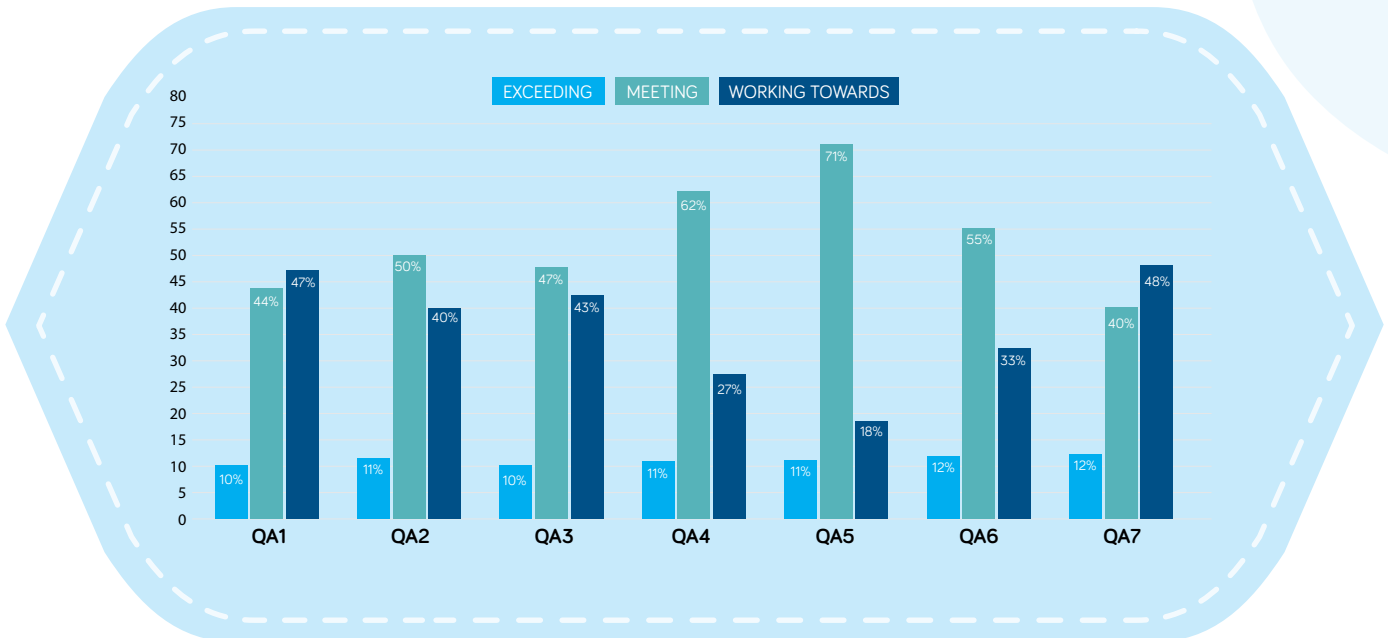
QUALITY AREA RATING

Figure 5 below shows services by NQS Quality Area⁶ rating as at 31 December 2016.

The highest proportion of Exceeding NQS ratings were awarded in the Quality Area (QA) 6 and 7 categories (both at 12%), though Exceeding NQS QA ratings are quite consistent across all Quality Areas, ranging from 10% to 12%.

The proportion of services rated either Meeting or Working Towards NQS is relatively comparable in QA1, QA2, QA3 and QA7; however there is a larger discrepancy between proportions in QA4, QA5 and QA6, with the majority of ratings in these areas allocated to the Meeting NQS category. 71% of services are rated Meeting NQS in QA5, 62% are rated Meeting NQS in QA4 and 55% are rated Meeting NQS in QA6, indicating a consistently strong performance by services in the areas of relationships with children, staffing arrangements and collaborative partnerships with families and communities.

FIGURE 5: SERVICE QUALITY AREA RATING⁶ AS AT 31 DECEMBER 2016.



⁶ 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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