



inColour

July-24

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RECHILD CARE CHILD

Assessing Child Care?

.. child's play

Sign up to our **Pro Plan**, with month-to-month and annual options, to immediately assess some of the metrics below, and order a report, for any custom catchment area in the country!

Demographics

- Total Population
- Working population
- Proportion of Pop. Aged Under 5
- School Population
- Population Growth & Forecasts By Age
- Recent Development Activity
- Employment Performance & Participation Rate
- Income & SEIFA performance

Nearby Competition

- LDC Centres & Places
- Places Per Population Aged Under 5
- Forecast Places Per Population
- Distance Between Centres
- Distance From Centres to Schools
- Centre Age
- Daily Fees
- Availability

Activity, Amenity & Access

- Total School Enrolments
- School Attendees Per 100 People
- School Attendees Per LDC Place
- Commercial Drivers
- Public Transport Trips Relative To Population
- Infrastructure & much more..

July-24

About AreaSearch



What We Do:

Our aim is to take the process of opportunity identification, assessment and reporting from weeks down to minutes ensuring our clients spend their time on deals that make sense, and quickly dismiss those that don't.

The AreaSearch platform covers the major drivers of investment performance, many of which are often overlooked, and provides instant targeting and analysis from macro right down to the address level.

With clients ranging from large property institutions to retail and essential service providers, developers and buyer's agents, our platform provides value at various market junctures, facilitating quick and confident location-based decisions.

Our Platform:

In-depth and instant area analysis, projections and reporting for custom (radial, polygon, drive-time) and predefined areas.

Choropleth and heatmap visualisation with hundreds of statistical overlays and hundreds of thousands of property points.

Best-in-class sector research incorporating data from multiple sources and deep demographic cross examination for effective supply and demand assessment.

Targeting: reverse engineered location analysis ~ choose your criteria, find top ranking locations.

Macro master file access to craft the perfect investment rationale.

Valued users include

dexus

Leading Australian Property Institution

Genius
childcare

National Child Care Operator

REVELOP

Diversified Investment Group

DWS

International Asset Management Group

CCREAL

International Investment Group

M P G
MCCA PROPERTY GROUP

Residential & Commercial Buyers Advocacy

In minutes, not days..

Seamlessly integrate AreaSearch in your workflows so you can do more work in less time, with far better results.

- Carefully compiled and thoroughly cross examined datasets featuring hundreds of thousands of unique datapoints.
- Features crafted by property people, inspired by industry experience spanning multiple decades.
- Instant local and macro insights with data updates semi-daily across various workable and presentable formats.

About This Report

This report aims to deliver a concise and factual overview of Australia's long day care sector, assisting investors and operators in aligning their current and future services with the needs of Australian families. Our research examines the variations in supply and demand dynamics across states and subregions, focusing on net additions of long day care places. This analysis is cross-referenced with May-24 local population data, school locations, and other relevant factors which site visitors can explore in detail for any custom catchment area in the country on our platform.

The Sector

The child care sector plays a crucial role in enhancing economic productivity by facilitating greater workforce participation and prioritising early childhood development. Government subsidies can cover up to 95% of child care costs for some parents. Despite bipartisan support, however, the sector faces persistent challenges related to costs, staffing, and access to care. These issues are often exacerbated by geographical misallocation of resources due to inadequate network planning.

Based on the latest data from ACECQA, Australia currently has 2.3 children under the age of 5 per Long Day Care (LDC) place. With this cohort projected to grow by 21.8% (337,399 children) by 2041, an estimated 147,908 additional places and 2,003 new centres (assuming the current ratio of 73 places per centre) will be needed to maintain the existing level of service.

Regional disparities are notable. For instance, Sydney's City and Inner South, one of the most well-supplied regions based on resident and school-based demand, has 1.63 children and 3.49 school places per LDC place. In contrast, Perth's Mandurah has 3.05 children and 9.17 school places per LDC place.

While local assessments covering resident, workforce, and school trends (see page 5) are crucial to the site selection and development process, we aim for the broader figures discussed in this report to provide insight into the volume of both opportunities and risks across states and subregions.

[Click for interactive detail](#)

Kids Per Place LDC By City

State Trends	
School Proximity	5
NSW	6
VIC	8
QLD	10
WA	12
SA	14
TAS	16
NT	17
ACT	18

9,150
Long Day Care Centres

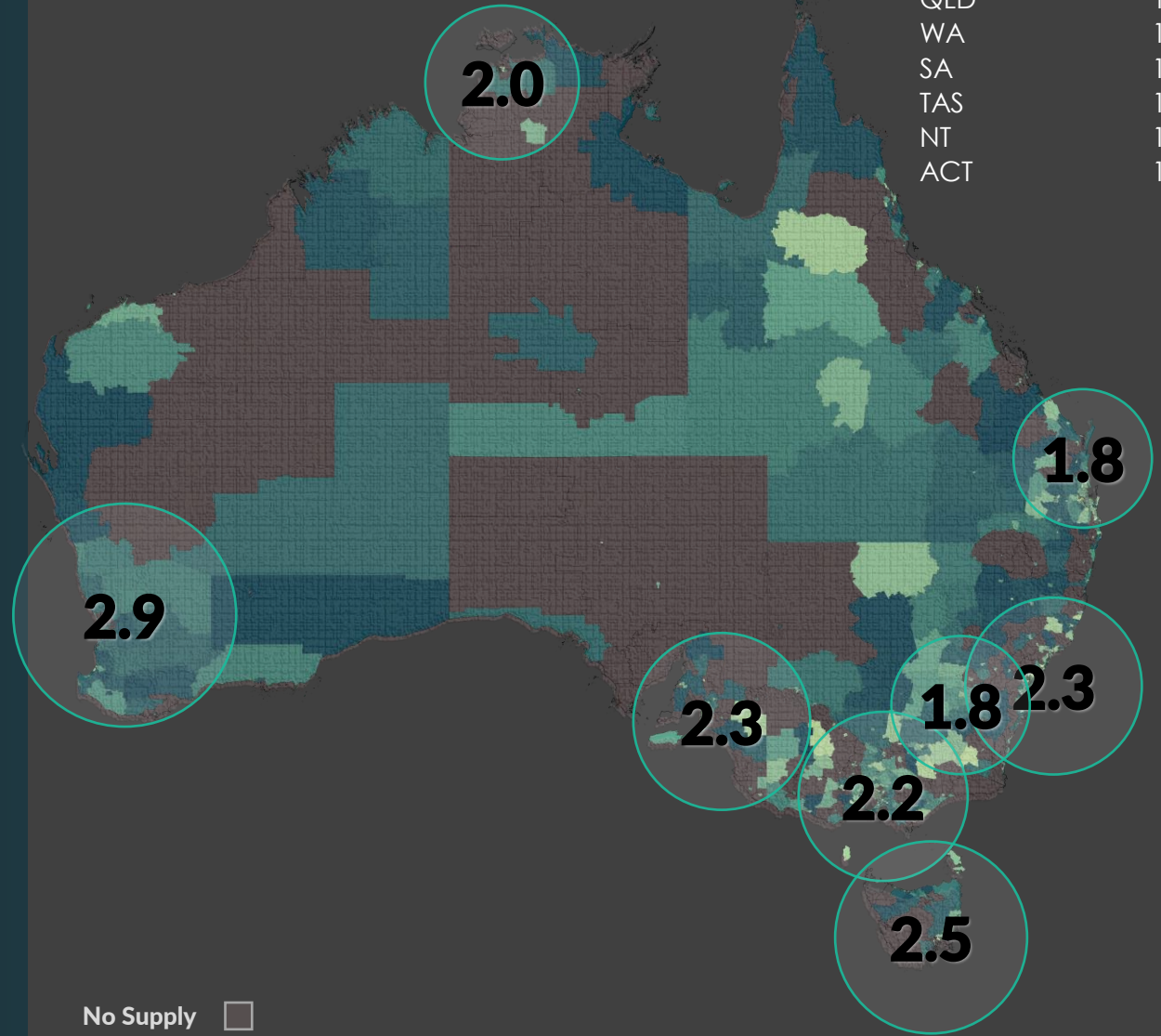
17,729
2024 Place Approvals

2.3
Supply Ratio: Kids Per Place

613m
Distance to Schools

\$136
Daily Fee *

c.\$3,400
Rent Per Child



No Supply

* Place-weighted avg. across all LDC service types/age categories



State & City Trends

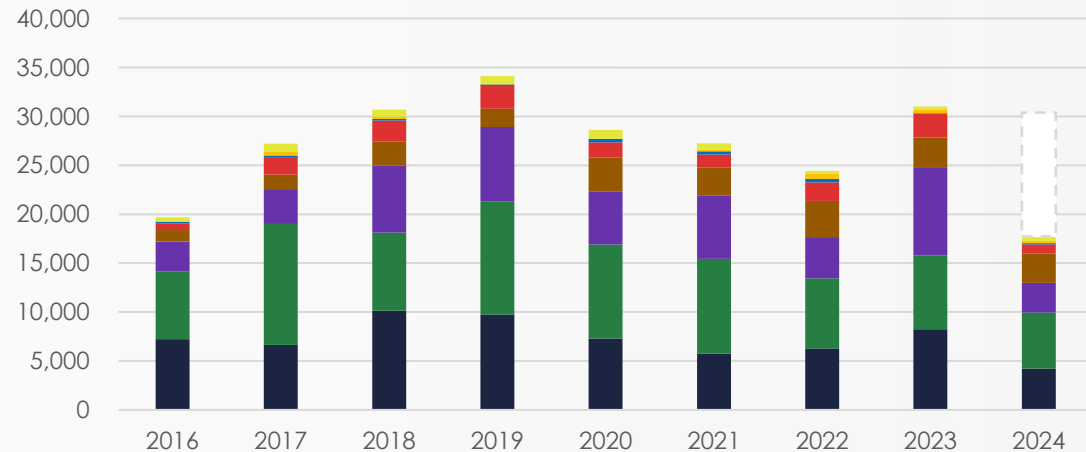
View interactive detail: AreaSearch.com.au/incolour/childcare

In the last quarter, Australia experienced an increase in new long day care place approvals, with 8,151 places registered. This figure is notably higher than the five-year average. While there has been a modest rise from the quarterly trend observed over the previous 12 months, the annual approval rates align with historical benchmarks. Victoria has consistently led in total approval volumes, whereas Western Australia has experienced the highest approval rate relative to its five-year average.

Over the past five years, rent per child has typically ranged from \$2,900 to \$4,000 nationwide, according to transactions assessed by AreaSearch. WA and NSW have generally experienced the highest rates.

Meanwhile, the average full-day fee for child care varies from \$114.5 in TAS to \$146.3 in ACT. Over the past two years, the most significant fee increases were observed in ACT and QLD, with growth rates of 15.1% and 14.2%, respectively.

- New South Wales
- Western Australia
- Northern Territory
- Victoria
- South Australia
- Australian Capital Territory
- Queensland
- Tasmania



Annualised

2024 LDC place approvals expected to be in line with the 5 year average

	Kids Per Place	School Enrolments Per Place	Average Daily Fee	Avg. LDC / School Proximity	% Aged Under 5	Pop. Growth Since Census	Res. Dwelling Apprvls. Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income (000s)
Greater Sydney	2.3	5.7	140	469	6.0	4.8	0.7	3.8	60	86.7
Non-Metro NSW	2.5	6.7	128	717	5.5	2.9	0.6	3.1	56.4	67.6
Greater Melbourne	2.2	5.5	143	496	5.9	6.5	0.9	4.1	64.1	78.6
Non-Metro Vic.	2.4	6.7	133	566	5.4	2.3	0.8	3.1	57.4	64.7
Greater Brisbane	1.8	4.9	135	575	6.0	8.4	0.8	4.3	64.5	76
Non-Metro Qld	2.1	6.2	126	647	5.4	6.0	0.6	3.8	59.1	69.9
Greater Adelaide	2.3	6.6	137	461	5.4	4.8	0.7	4	61.7	69.5
Non-Metro SA	4.2	11.8	123	416	5.0	4.2	0.6	3.5	54.1	60.6
Greater Perth	2.9	7.7	138	523	6.1	9.6	0.6	3.7	65.2	84
Non-Metro WA	4.2	11.6	129	582	6.0	7.2	0.5	3.8	59.4	76.6
Greater Hobart	2.5	7.7	116	546	5.2	3.7	0.6	4.3	61.6	69.2
Non-Metro Tas.	3.9	11	113	456	5.0	4.1	0.5	4	55.7	62.3
Greater Darwin	2	4.8	123	502	6.8	7.9	0.2	2.9	69.7	80.4
Non-Metro NT	4.8	10.1	116	1,640	7.3	14.3	0.2	5.9	50.7	65.8
Australian Capital Territory	1.8	4.9	146	593	5.9	4.0	1.1	3.6	69.6	89.1




School Proximity Study

View area & interactive detail: </incolour/childcare>

While this document is based on analysis of defined statistical areas, we are yet to meet a parent who takes statistical boundaries into consideration when putting their child into day care. What is routinely considered however, and frequently the key to success, is proximity to nearby schools.

This is our preferred method of detailed opportunity identification (shortlisting) for clients, and some clear opportunities can be seen on the adjoining charts. Both charts plot every school in Australia with 200 or more children aged under 5 residing within a 2km radius, with the upper chart highlighting the level of LDC supply against the number of children per place and lower chart showing LDC supply vs the total number of children.

On this basis there were **73** 2km school catchments identified with **no LDC supply** and **472** schools where the surrounding LDC place ratio is **greater than 5** children per place. Additionally, there were **908** schools identified with **no LDC supply** within 1km, more than half of these being located in metro areas.

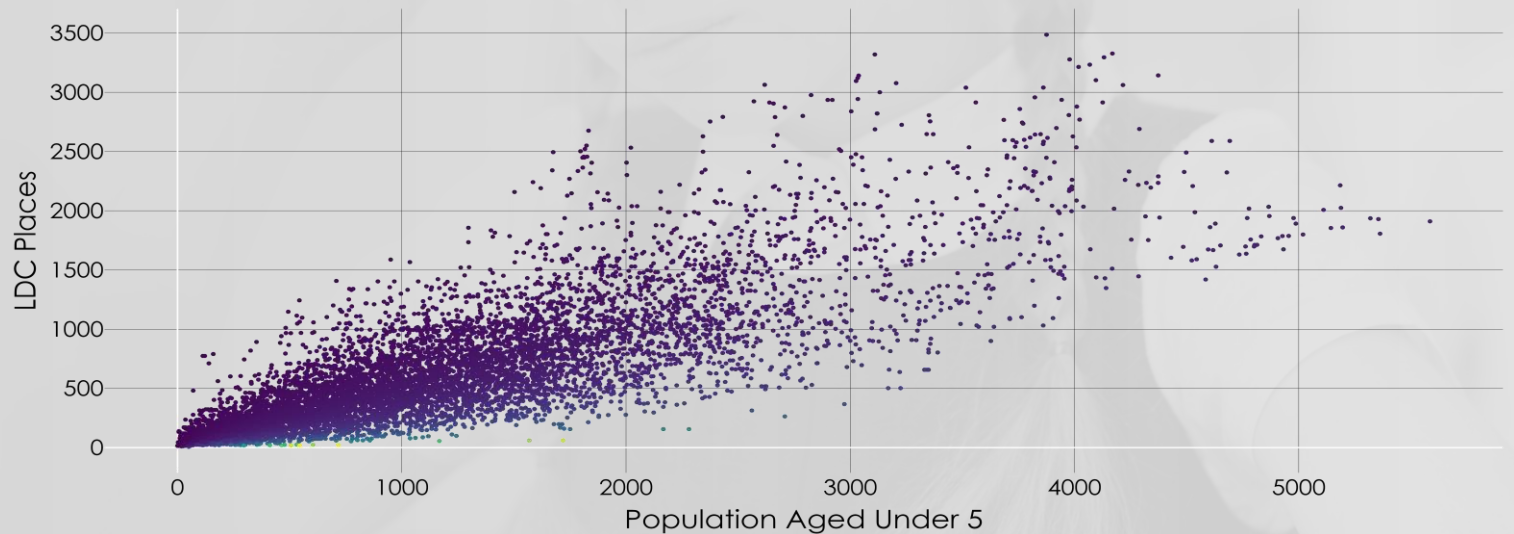
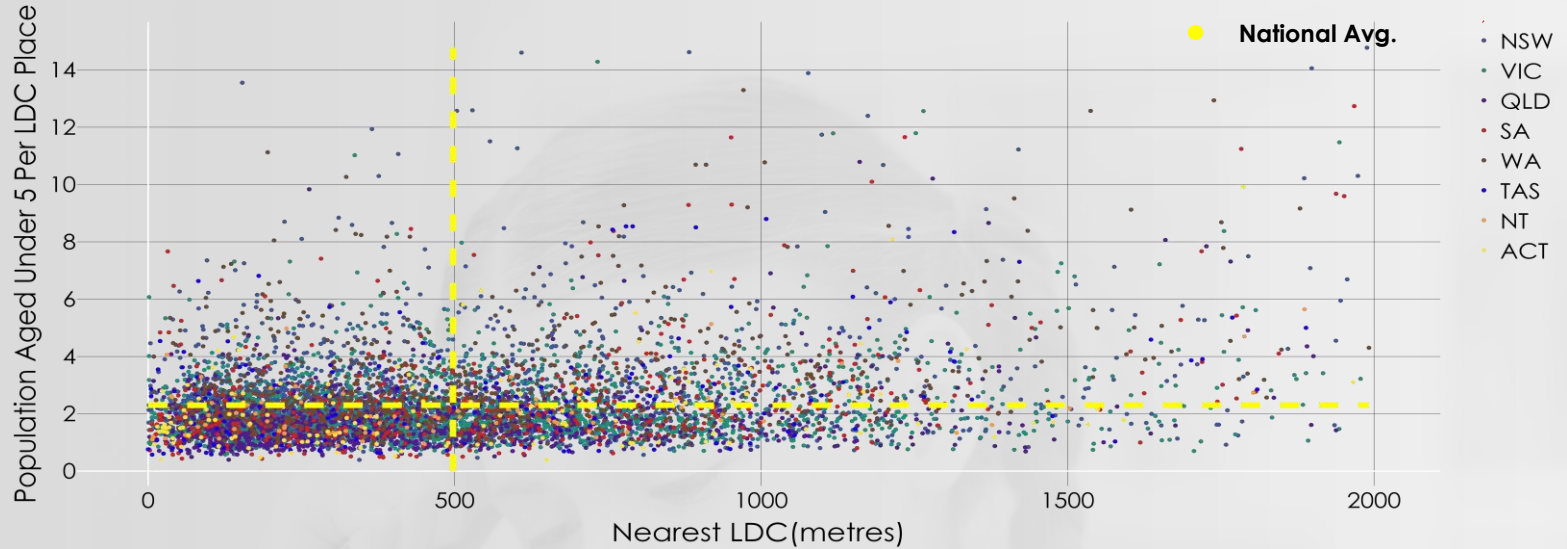


Get your hands on the data

Contact us at:
AreaSearch.com.au/contact

School Catchment Analysis

Note: Catchments with supply ratios above 15 excluded for visualisation purposes



Greater Sydney & New South Wales

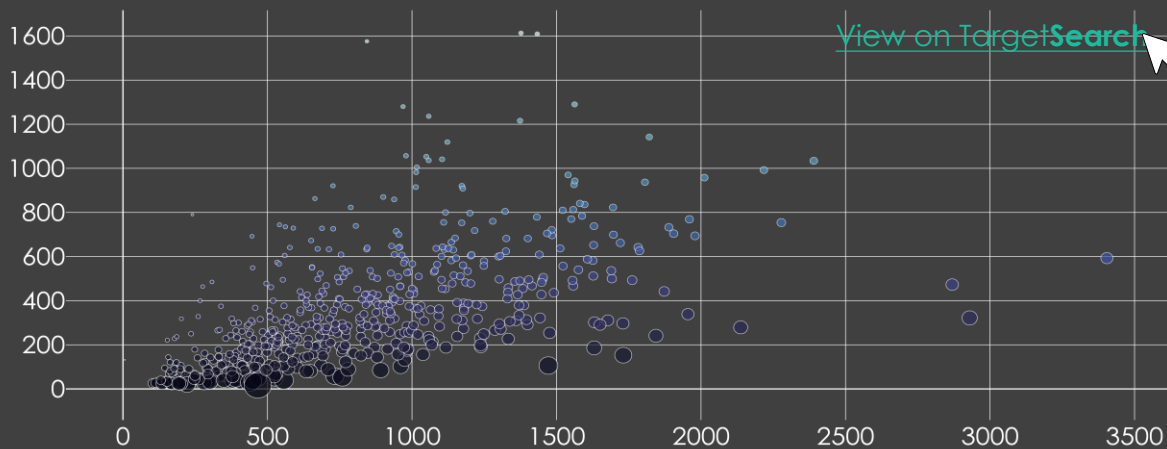
The number of long day care place approvals in NSW has significantly surpassed the typical volume observed over a three-month period in the past five years, with an increase of 2,271 registrations during this period. This marks a rise from the quarterly trend noted over the past 12 months, where approval rates have similarly surpassed historical annual averages.

NSW has 486,929 children under the age of 5 and a total of 207,739 long day care (LDC) places, resulting in a demand/supply ratio of 2.3 children per place, ranking it fifth in this metric. Population growth projections to 2041 indicate that the state will need an additional 29,498 LDC places to maintain the current ratio, assuming no closures of existing centres. The majority of these new places will be required in the metropolitan region. With an average of 58 places per centre, which is the smallest centre size among all states, NSW would need to establish 503 new centres to meet this projected demand.

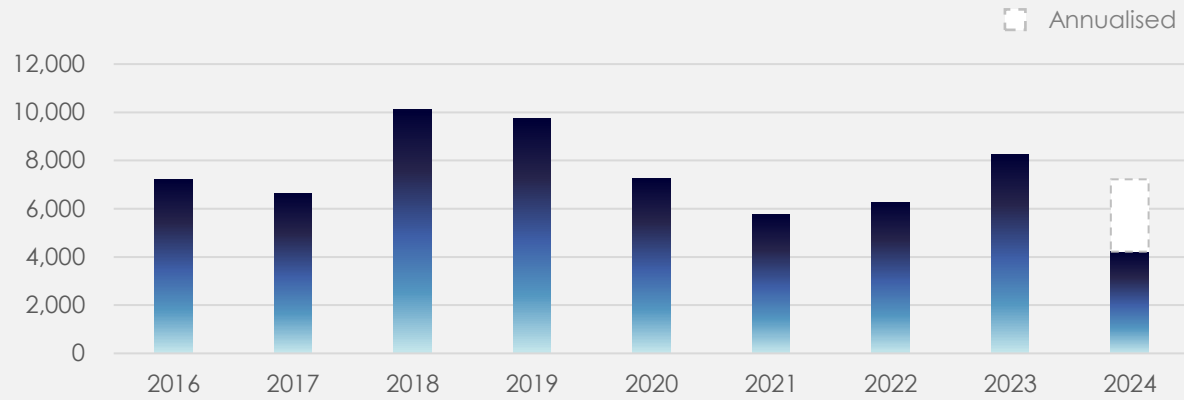
Regarding proximity, the population in NSW is generally well-served compared to other states. On average, individuals are located 0.4 km from their nearest child care centre in metropolitan areas and 14.8 km in non-metropolitan regions. However, there remains considerable variation in this metric at the subregional level.

There are significant variations in supply and demand across SA4 regions within NSW. For instance, New England & North West and Blacktown exhibit particularly high demand from residents and school-based populations relative to available services. Conversely, regions like City & Inner South experience lower demand compared to the supply of services.

SA2 Population Under 5 (x-axis) vs. LDC Places (y-axis)



Net LDC Place Approvals 2016 - 2024 YTD



	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity
Greater Sydney	2,518	144,333	106,943	2.3	5.7	140	469
Baulkham Hills and Hawkesbury	140	10,014	6,590	1.6	4.9	146	713
Blacktown	177	9,988	10,107	3.4	7.3	129	485
City and Inner South	140	8,979	5,888	1.6	3.5	153	381
Eastern Suburbs	131	7,057	6,660	2.0	5.3	162	339
Inner South West	316	14,250	7,920	2.7	5.7	127	378
Inner West	143	8,707	7,101	1.9	5.0	153	331
North Sydney and Hornsby	211	12,542	12,739	1.8	6.0	163	452
Northern Beaches	106	7,235	6,543	2.0	5.6	150	453
Outer South West	152	9,235	5,391	2.6	5.6	126	604
Outer West and Blue Mountains	159	9,569	6,771	2.4	5.7	126	553
Parramatta	261	13,595	7,742	2.5	5.6	131	417
Ryde	91	5,857	5,809	1.9	5.3	159	518
South West	224	12,452	6,613	2.8	7.4	126	477
Sutherland	131	6,355	5,650	2.2	5.9	134	408
Central Coast	136	8,498	5,419	2.3	6.2	134	667
Non-Metro NSW	1,025	63,406	46,738	2.5	6.7	128	717

* Kids Per Place





A few interesting areas ..

areasearch.com.au/nsw/auburn_central

areasearch.com.au/nsw/box_hill_nelson

areasearch.com.au/nsw/glenfield

areasearch.com.au/nsw/epping_east_north_epping

Demographic Drivers

Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwelling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
5,484,055	6.0	4.8	0.7	3.8	60.0	86,706
284,945	5.5	7.8	1.4	2.5	65.3	92,680
434,257	7.6	8.3	1.2	4.7	60.6	70,315
357,623	4.1	7.9	0.5	4.3	68.2	100,144
274,122	5.1	4.9	0.3	3.7	65.2	154,289
625,131	6.1	3.3	0.4	3.9	52.8	66,070
315,415	5.1	3.5	0.4	3.8	64.3	97,510
438,604	5.1	3.4	0.4	3.7	65.1	131,694
268,137	5.4	1.7	0.3	1.9	65.5	119,715
315,182	7.4	6.0	0.7	5.0	60.5	68,215
343,332	6.6	3.4	0.5	3.0	61.4	71,957
518,139	6.7	5.0	0.8	4.1	54.5	64,994
211,611	5.3	4.7	0.9	3.6	63.1	94,508
508,441	6.8	7.2	1.1	5.5	49.5	63,730
235,571	5.8	2.6	0.5	2.2	64.5	91,709
353,545	5.6	2.0	0.5	2.7	55.7	69,700
2,911,285	5.5	2.9	0.6	3.1	56.4	67,556

2.3

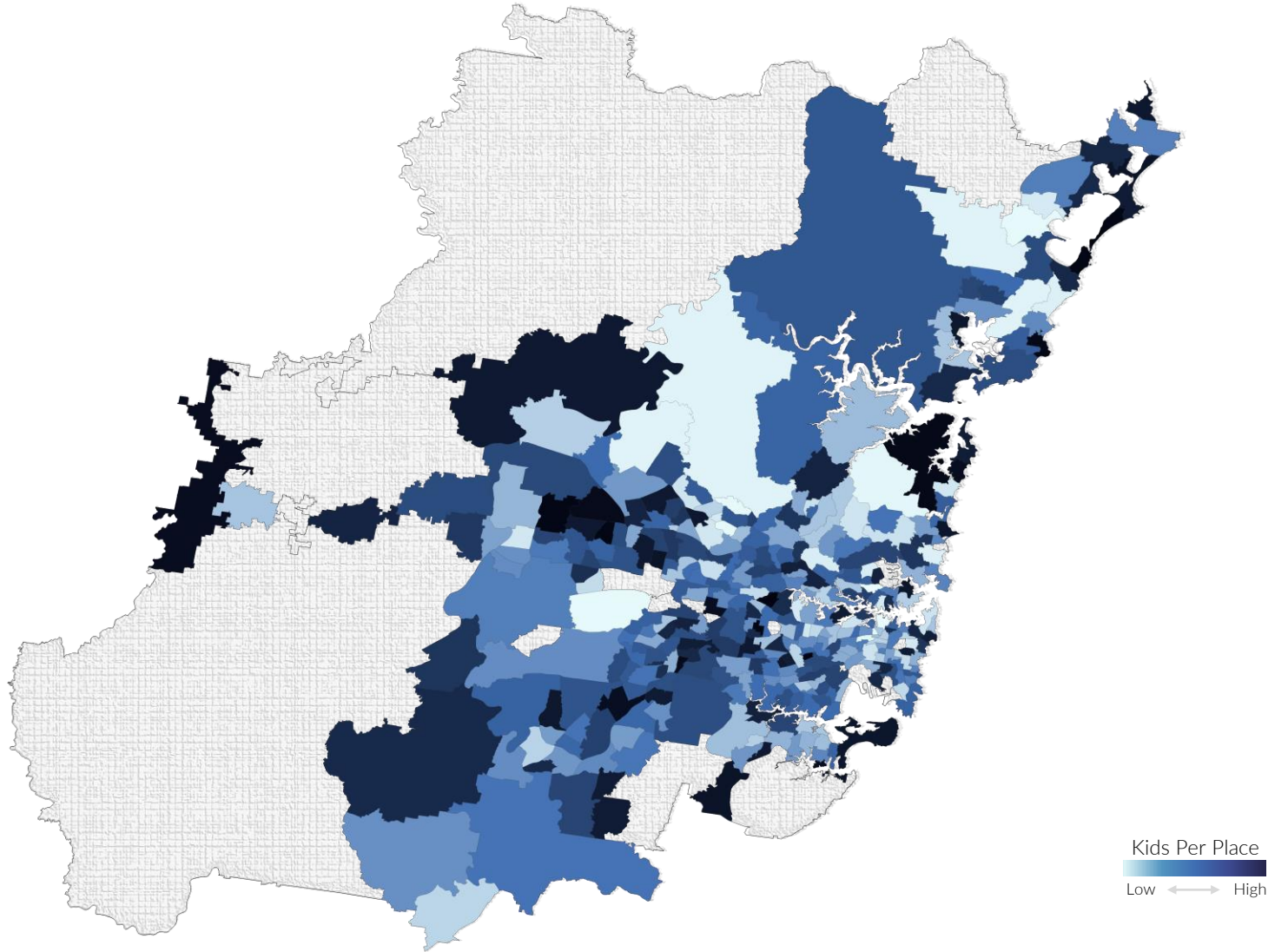
Children Aged Under 5 Per LDC Place

\$140 +11.1%
2yr growth

Average Daily Fee

469m * Metro

Average School Proximity



Greater Melbourne & Victoria

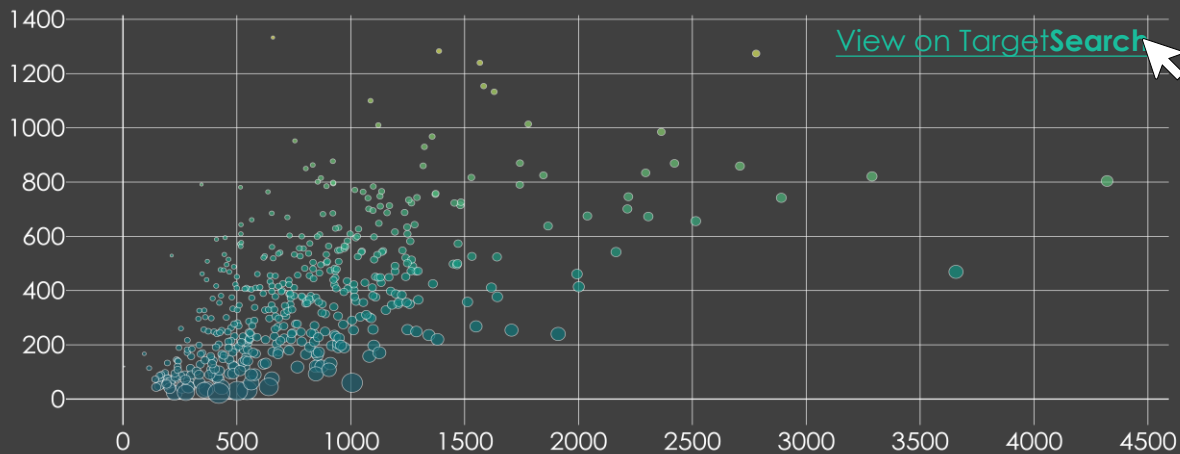
In the last quarter, VIC saw new long day care place approvals consistent with the five-year average, with 2,176 places registered during this period. This mirrors the quarterly trend observed over the past 12 months, while annual approval rates have remained aligned with historical benchmarks.

Victoria has a total of 395,914 children under the age of five and offers 180,000 long day care (LDC) places. This results in a demand/supply ratio of 2.2 children per place, ranking the state sixth in this metric. Population growth projections to 2041 indicate that Victoria will require an additional 65,339 LDC places to maintain the current ratio, assuming no existing centres close. Most of this demand will be concentrated in the metropolitan region. Victoria has the largest average centre size in the country, with approximately 91 places per centre. To meet the projected demand, 713 new centres of this size would be necessary.

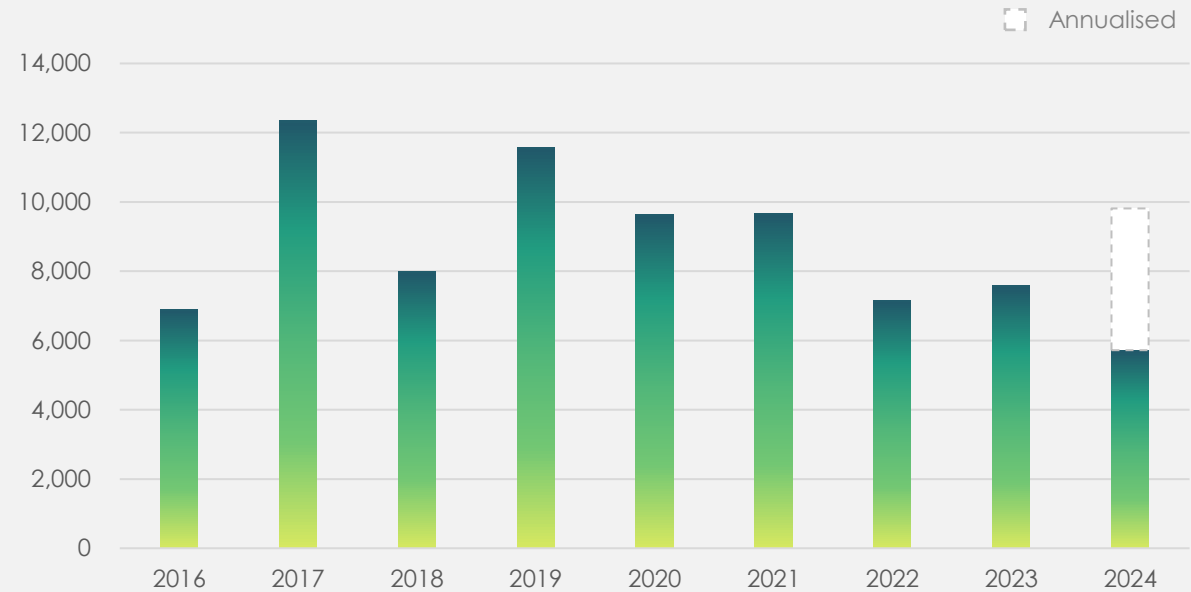
The region's population generally has better-than-average access to child care compared to other states. On average, individuals are located 0.5 km from their nearest centre in metropolitan areas and 2.4 km in non-metropolitan areas. Further variations in these distances are observed at the subregional level.

Over the past year, place approvals in VIC have exceeded those in most other states on a per population basis. Notable SA4 regions experiencing a supply shortfall include Warrnambool & South West and North West. The 'children per place' metric in these areas stands at 3.2 and 2.8, respectively. Additionally, the ratio of school places to LDC places in these regions is recorded at 9.4 and 6.8.

SA2 Population Under 5 (x-axis) vs. LDC Places (y-axis)



Net LDC Place Approvals 2016 - 2024 YTD



	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity
Greater Melbourne	1,561	142,951	115,652	2.2	5.5	143	496
Inner	191	15,848	11,436	1.7	4.8	153	373
Inner East	117	9,768	8,472	1.7	6.7	157	470
Inner South	153	13,923	10,627	1.6	4.6	153	437
North East	163	15,957	14,662	2.3	5.2	141	479
North West	120	11,478	10,249	2.9	6.8	140	551
Outer East	161	13,437	12,135	2.2	5.7	143	511
South East	278	25,339	20,302	2.4	5.8	136	500
West	284	29,231	21,458	2.4	5.3	140	556
Mornington Peninsula	94	7,970	6,311	2.1	5.8	138	609
Non-Metro Vic.	404	37,049	36,364	2.4	6.7	133	566

* Kids Per Place





A few interesting areas ..

areasearch.com.au/vic/melton_south_weir_views

areasearch.com.au/vic/coburg_north

areasearch.com.au/vic/truganina_north

areasearch.com.au/vic/dromana

Demographic Drivers

Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwelling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
5,236,160	5.9	6.5	0.9	4.1	64.1	78,609
677,590	4.0	9.8	1.1	4.2	71.1	100,302
393,438	4.2	5.4	0.7	4.0	62.0	98,353
441,298	5.0	4.4	0.7	2.6	66.1	105,038
572,345	6.4	5.9	1.0	4.0	64.1	72,905
452,121	7.1	6.6	1.0	5.5	60.6	67,885
529,478	5.6	2.2	0.4	3.1	64.6	72,243
921,253	6.6	7.1	0.9	4.1	62.4	65,900
934,770	7.4	9.6	1.4	4.9	63.6	68,157
313,867	5.4	1.8	0.5	2.8	58.9	74,893
1,613,558	5.4	2.3	0.8	3.1	57.4	64,682

2.2

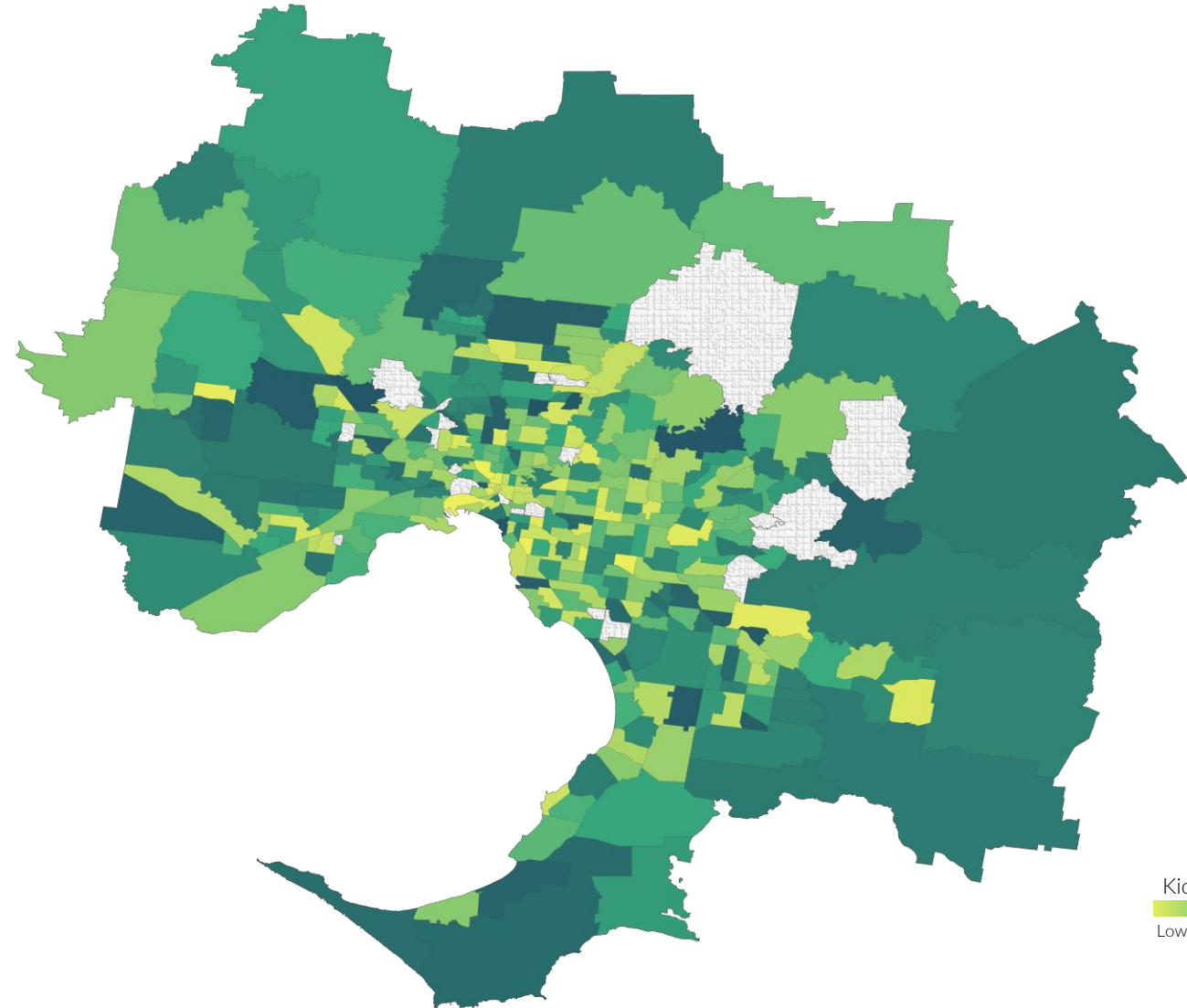
Children Aged Under 5 Per LDC Place

\$143 +13.6%
2yr growth

Average Daily Fee

496m * Metro

Average School Proximity



Greater Brisbane & Queensland

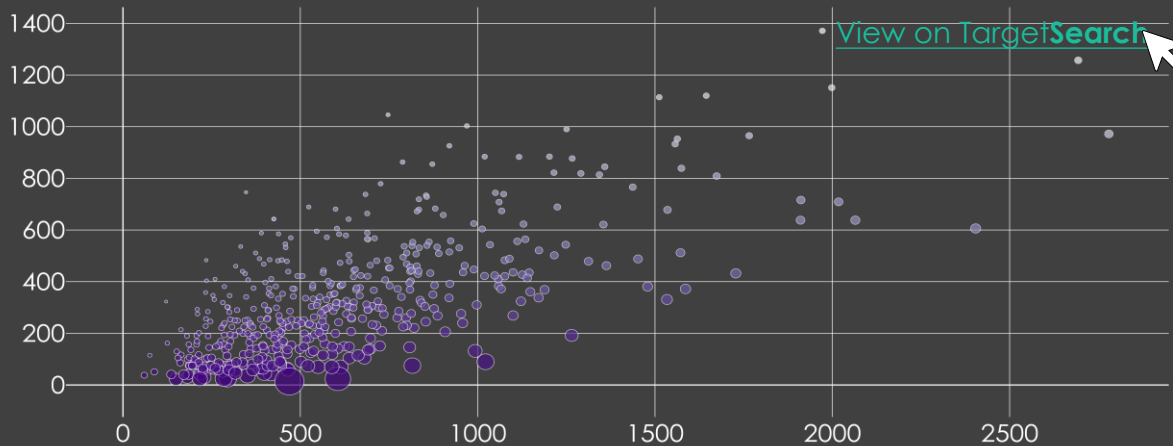
The number of long day care place approvals in QLD has been significantly lower than the typical volume observed over the past five years for a three-month period, with an increase of 1,126 places registered during this timeframe. This represents a notable deceleration from the quarterly trend recorded over the past 12 months. However, on an annual basis, the overall approval rates have been consistent with historical averages.

Queensland has a population of 312,416 children under the age of five and offers a total of 161,686 long day care places. This results in a demand/supply ratio of 1.9 children per place, ranking the state seventh in this metric. Projections for population growth up to 2041 indicate that the metro region will need an additional 24,844 places to maintain its current ratio of 1.8. Given that there are approximately 86 places per centre in Queensland, an estimated 441 new centres would be necessary to accommodate this increase.

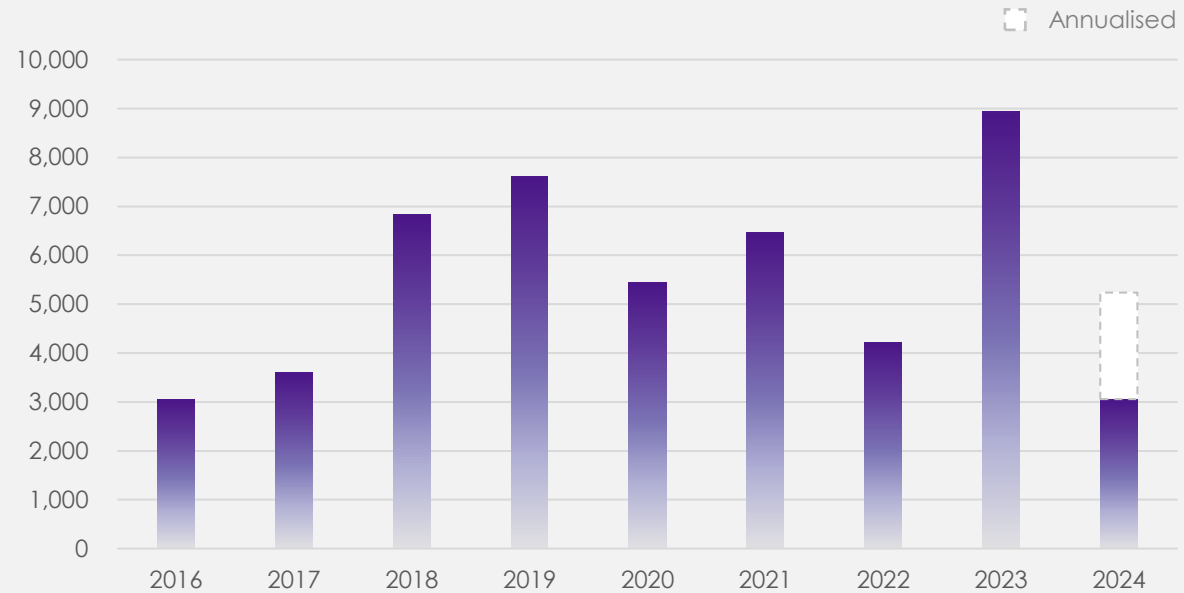
Regarding distance, the population in QLD is generally well-served compared to other states. Typically, a resident is located 0.8 km from their nearest child care centre in metropolitan areas and 3.3 km in non-metropolitan regions. However, there remains significant variation in this metric at a subregional level.

Outback was noted for having a 'children per place' metric of 4.9 and a ratio of school places to long day care places at 10.5.

SA2 Population Under 5 (x-axis) vs. LDC Places (y-axis)



Net LDC Place Approvals 2016 - 2024 YTD



	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity
Greater Brisbane	980	89,048	53,506	1.8	4.9	135	575
East	81	7,065	4,843	1.9	5.1	129	555
North	82	7,704	5,352	1.9	4.4	141	561
South	137	11,919	9,635	2.0	5.8	140	507
West	74	6,581	5,732	1.5	5.9	141	559
Inner City	109	9,110	5,904	1.5	5.6	151	406
Ipswich	147	13,621	7,142	2.1	5.0	130	648
Logan - Beaudesert	169	15,629	5,707	1.9	4.1	125	604
Moreton Bay - North	92	8,633	4,056	1.8	5.1	130	752
Moreton Bay - South	89	8,786	5,135	1.8	3.9	137	568
Non-Metro Qld	892	72,638	38,684	2.1	6.2	126	647

* Kids Per Place





A few interesting areas ..

areasearch.com.au/qld/scarborough_newport

areasearch.com.au/qld/pallara_willawong

areasearch.com.au/qld/narangba

areasearch.com.au/qld/kangaroo_point

Demographic Drivers

Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwelling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
2,737,885	6.0	8.4	0.8	4.3	64.5	76,007
251,357	5.5	4.8	0.6	3.3	63.5	77,522
236,838	6.0	5.5	0.5	4.1	67.2	78,055
399,482	5.9	7.7	0.6	3.9	67.3	76,154
198,914	5.1	5.1	0.4	2.7	66.7	96,635
321,980	4.2	10.2	1.0	4.0	72.6	107,131
403,280	7.0	9.9	0.8	4.9	60.9	64,015
400,938	7.1	11.4	1.2	4.6	60.5	61,661
290,991	5.4	9.9	1.0	6.6	54.6	62,512
234,105	6.6	7.5	0.5	4.2	68.6	73,699
2,771,918	5.4	6.0	0.6	3.8	59.1	69,889

1.8

Children Aged Under 5 Per LDC Place

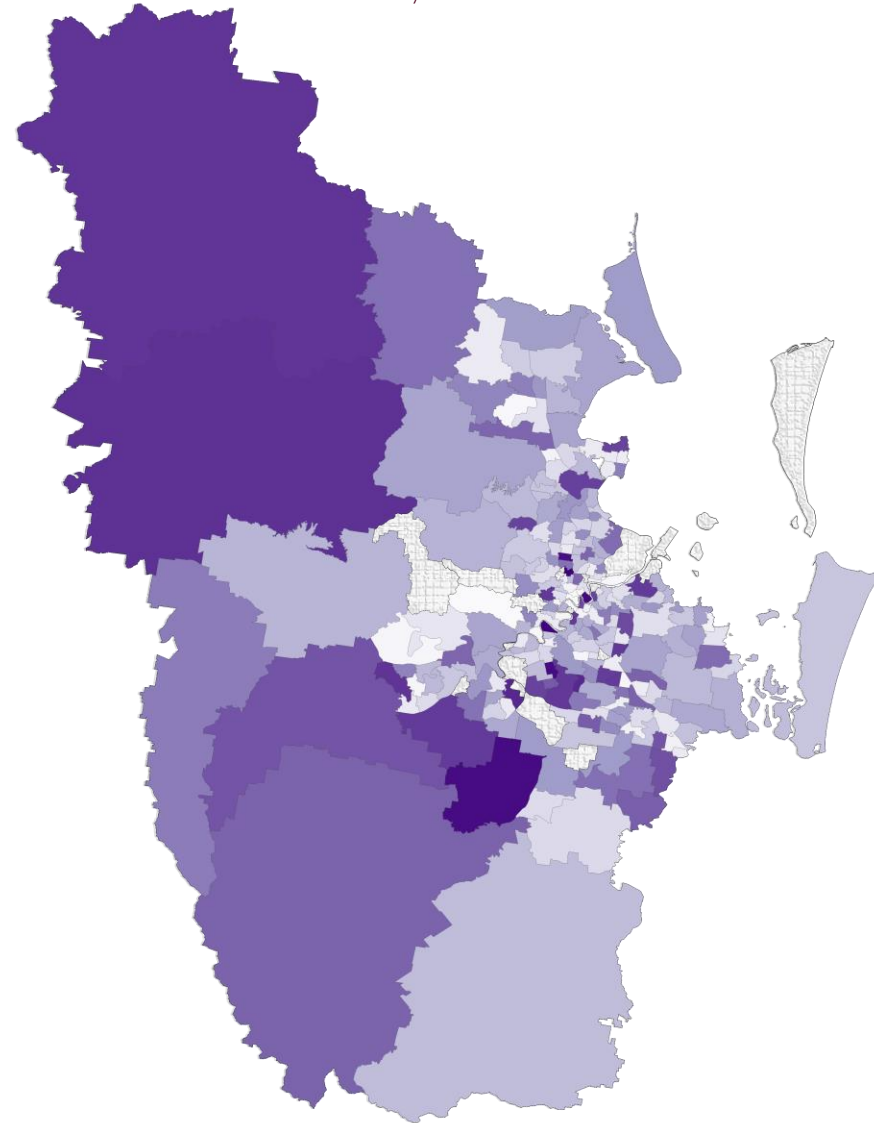
\$135 +14.1%
2yr growth

Average Daily Fee

575m

Average School Proximity

* Metro



Kids Per Place
Low ← High



Greater Perth & Western Australia

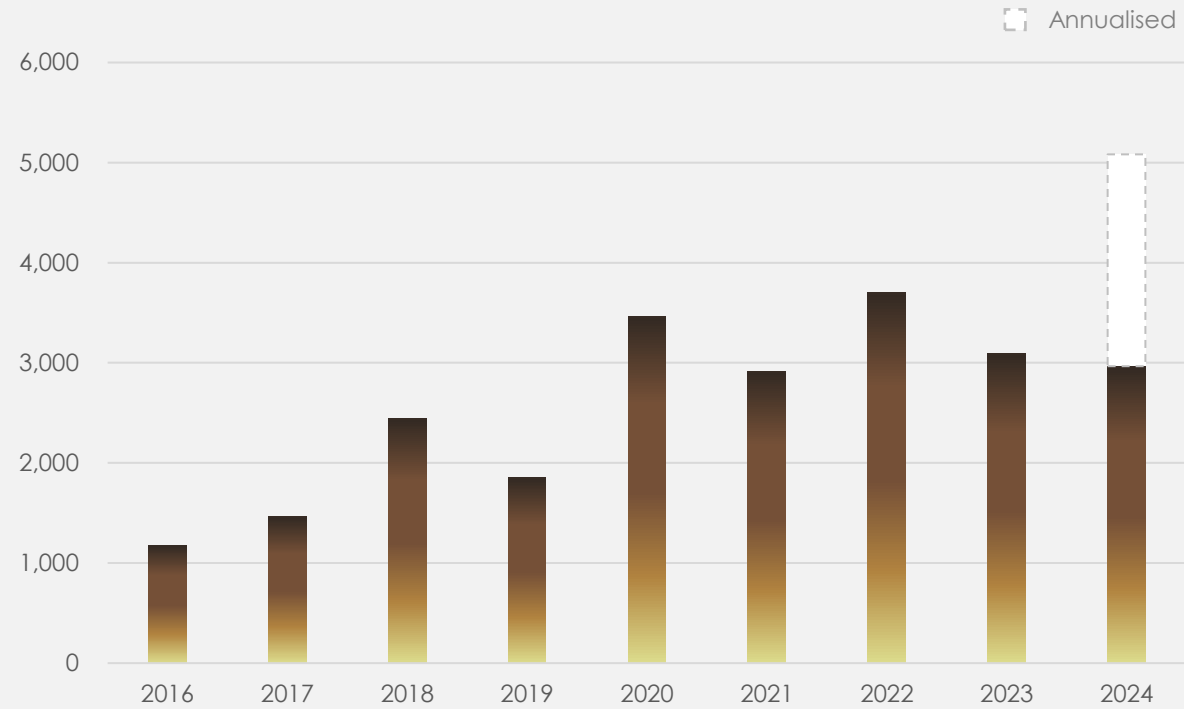
The number of long day care place approvals in WA has significantly exceeded the typical volume observed over the past five years, with an increase of 1,470 registered in the recent period. This represents a notable rise from the quarterly trend seen over the past 12 months, while overall annual approval rates have also increased compared to historical benchmarks.

Western Australia has 175,968 children under the age of 5 and a total of 57,172 long day care places, resulting in a demand/supply ratio of 3.1 children per place, placing it second in these terms. Population growth projections to 2041 indicate that the metro region will need 9,029 new places to maintain the current ratio, given an anticipated 18.4% increase in the child population (+26,132 in total). With an average of 66 places per centre in WA, 149 new centres would be needed to meet this demand.

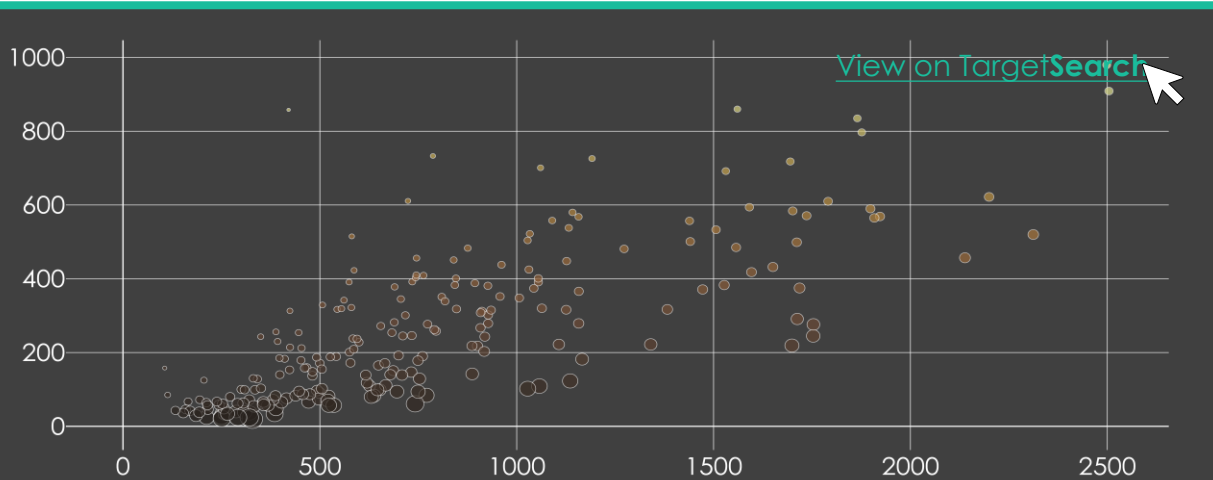
In terms of distance, the region's population has lower-than-average access to child care services compared to other states. On average, individuals are located 0.7 km from their nearest centre in metropolitan areas and 14.6 km in non-metropolitan areas, with further variations observed at the subregional level.

Over the past 12 months, place approvals in WA have been higher on a per population basis compared to most other states. However, certain SA4 regions, such as Wheat Belt and Mandurah, show significant supply shortfalls. The 'children per place' metric in these regions stands at 5.4 and 3.0, respectively. Additionally, the ratio of school places to LDC places is recorded at 15.2 in Wheat Belt and 9.2 in Mandurah.

Net LDC Place Approvals 2016 - 2024 YTD



SA2 Population Under 5 (x-axis) vs. LDC Places (y-axis)



	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity
Greater Perth	700	49,073	27,366	2.9	7.7	138	523
Mandurah	32	2,078	745	3.1	9.2	121	666
Inner	68	4,524	2,376	2.0	7.9	155	498
North East	83	5,700	3,535	3.6	8.0	135	585
North West	183	12,948	8,471	3.0	8.1	137	499
South East	178	12,961	6,423	2.9	7.2	137	532
South West	156	10,862	5,816	2.9	7.5	137	489
Non-Metro WA	164	8,099	2,577	4.2	11.6	129	582

* Kids Per Place





A few interesting areas ..

areasearch.com.au/wa/piara_waters_forrestdale

areasearch.com.au/wa/nollamara_westminster

areasearch.com.au/wa/dawesville_bouvard

areasearch.com.au/wa/wellard_west_bertram



Demographic Drivers

Total Population	% Aged Under 5 Since Census	Population Growth	Res. Dwelling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
2,320,568	6.1	9.6	0.6	3.7	65.2	83,983
119,846	5.3	11.3	0.9	3.5	52.2	76,215
200,653	4.5	10.1	0.5	2.4	67.1	136,202
304,941	6.6	10.3	0.7	3.7	65.8	75,936
625,548	6.2	8.4	0.5	3.9	66.9	80,867
581,315	6.4	9.8	0.6	4.6	65.0	75,338
488,265	6.3	10.1	0.7	3.2	65.2	83,737
573,504	6.0	7.2	0.5	3.8	59.4	76,602

2.9

Children Aged Under 5 Per LDC Place

\$138

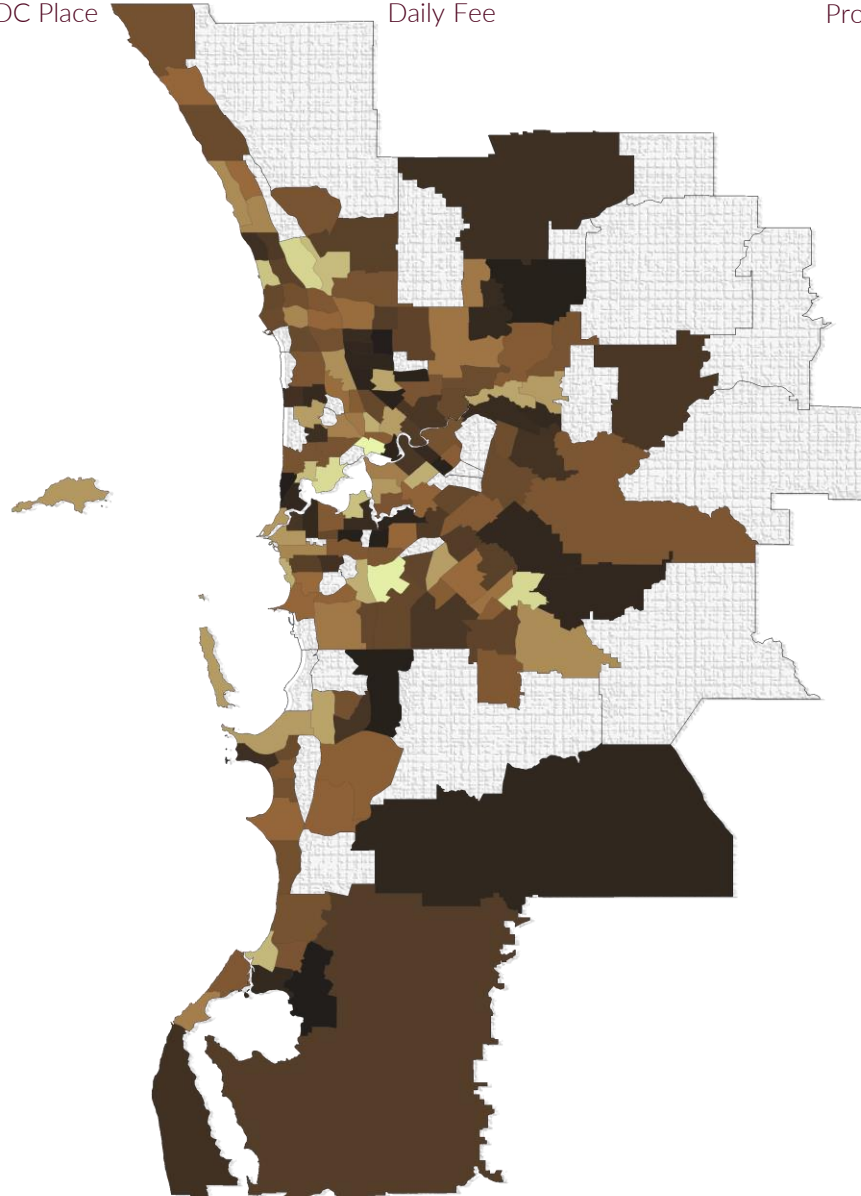
+12.5%
2yr growth

Average Daily Fee

523m

Average School Proximity

* Metro



Kids Per Place
Low ← → High



Greater Adelaide & South Australia

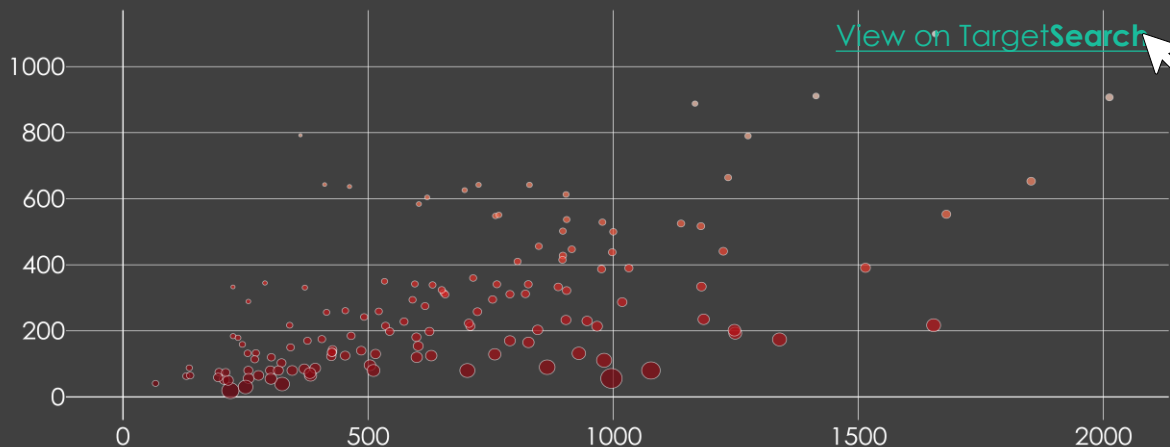
In the last quarter, South Australia saw a notable increase in new long day care place approvals, with 844 new places approved. This number exceeds the five-year average. The quarterly trend over the past year also indicates growth, with annual approval rates higher than historical averages.

South Australia has 98,473 children under the age of five and a total of 38,524 long day care places, resulting in a demand/supply ratio of 2.6 children per place, ranking fourth in this metric. Population growth projections up to 2041 suggest that the metropolitan region will need 4,647 new places to maintain the current ratio, due to an expected 13.8% increase in the child population, adding approximately 10,816 children. With an average of 79 places per centre in South Australia, 62 new centres will be needed to meet this demand.

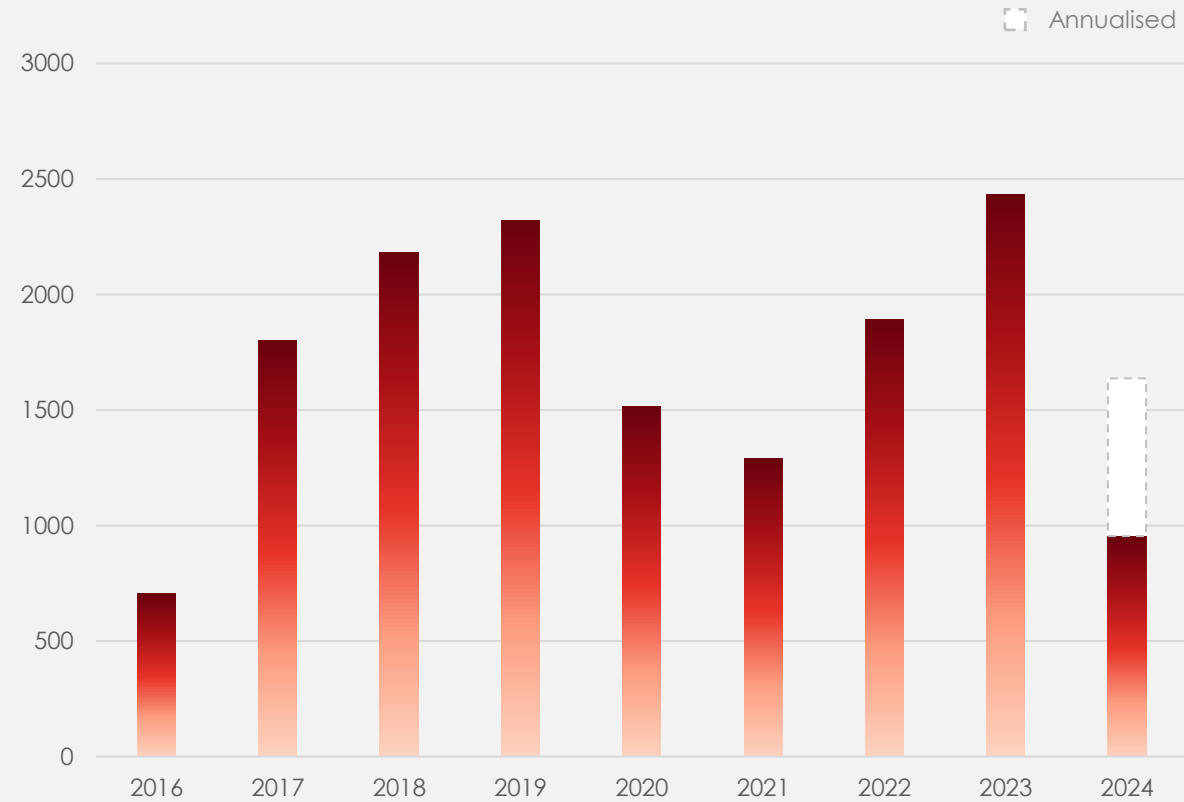
Regarding distance, the population in the region is generally well-served compared to other states. On average, metro residents are 0.7km from their nearest centre, while non-metro residents are 5.4km away. There are additional variations in these distances at the subregional level.

There are significant variations in supply and demand across SA4 regions compared to other states, with areas such as Outback and North experiencing high resident and school-based population demand relative to available services.

SA2 Population Under 5 (x-axis) vs. LDC Places (y-axis)



Net LDC Place Approvals 2016 - 2024 YTD



	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity
Greater Adelaide	409	33,675	34,407	2.3	6.6	137	461
Central and Hills	110	8,815	9,202	1.7	7.0	136	391
North	121	10,305	11,253	3.0	7.1	136	542
South	112	8,580	8,993	2.3	6.7	139	459
West	66	5,975	4,959	2.2	5.3	140	431
Non-Metro SA	74	4,849	8,123	4.2	11.8	123	416

* Kids Per Place





A few interesting areas ..

- areasearch.com.au/sa/lewiston_two_wells
- areasearch.com.au/sa/parafield_gardens
- areasearch.com.au/sa/craigmore_blakeview
- areasearch.com.au/sa/davoren_park

Demographic Drivers

Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwelling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
1,454,198	5.4	4.8	0.7	4.0	61.7	69,465
328,543	4.6	5.2	0.8	3.3	63.4	85,160
480,565	6.3	5.5	0.8	4.9	60.2	59,829
388,820	5.1	3.7	0.5	3.7	61.6	68,495
256,270	5.1	4.9	0.8	3.8	62.5	68,880
407,288	5.0	4.2	0.6	3.5	54.1	60,575

2.3

Children Aged Under 5 Per LDC Place

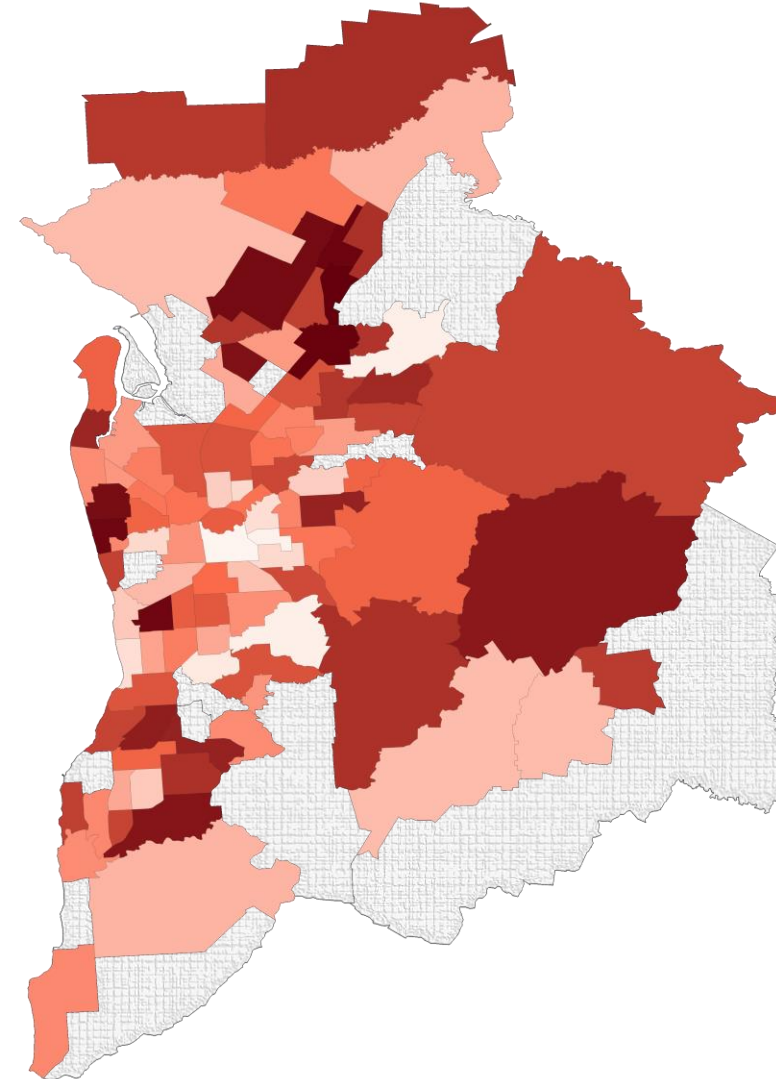
\$137 +13.3%
2yr growth

Average Daily Fee

461m

* Metro

Average School Proximity



Kids Per Place
Low ← High



Greater Hobart & Tasmania

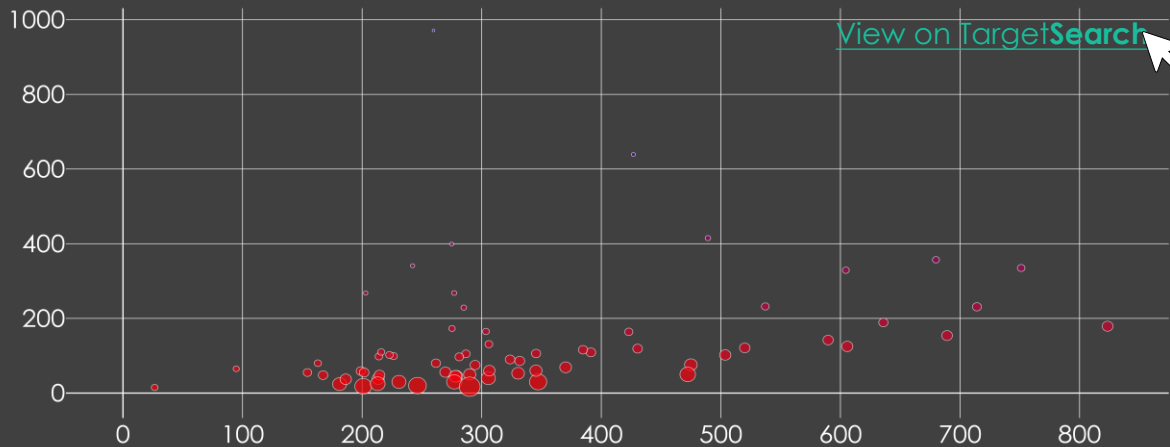
TAS experienced a number of new long day care place approvals in the last quarter significantly below the five-year average, with an increase of 46 registered during this period. This continues the quarterly trend observed over the past 12 months. Annually, overall approval rates were notably lower than historical benchmarks. On a yearly growth basis, TAS ranked eighth among all states for approval activity. The state has a total of 29,309 children under the age of 5 and 9,349 long day care places available. This results in a demand/supply ratio of 3.1 children per place, ranking the region first in this metric. Population growth projections to 2041 indicate a decrease in demand for child care, with the number of children under 5 expected to decline by 3.2% (937 fewer children).

The region's population has lower-than-average access to child care services compared to other states, with the typical resident located 2.5 km from the nearest child care centre. The disparity between supply and demand across SA4 regions in Tasmania is generally less marked than in other states. However, the West & North West region stands out significantly when considering the 'kids per place' metric.

	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity
Greater Hobart	70	5,264	2,552	2.5	7.7	116	546
Non-Metro Tas.	70	4,085	2,160	3.9	11.0	113	456

* Kids Per Place

SA2 Population Under 5 (x-axis) vs. LDC Places (y-axis)



2.5

Children Aged Under 5 Per LDC Place

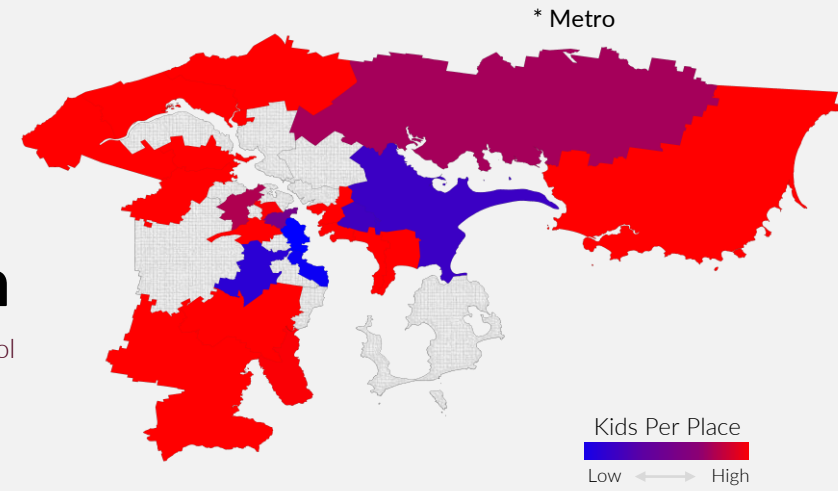
\$116

Average Daily Fee

+8.6% 2yr gr

546m

Average School Proximity

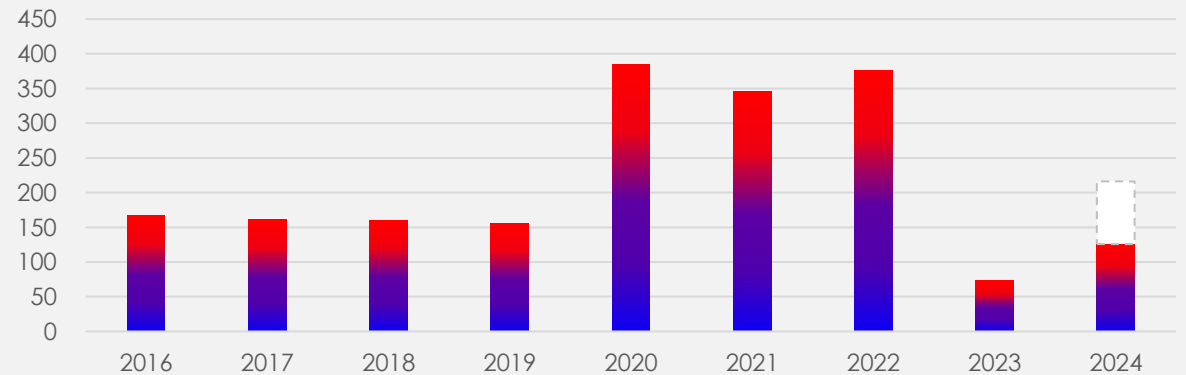


Demographic Drivers

Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwelling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
256,212	5.2	3.7	0.6	4.3	61.6	69,196
321,861	5.0	4.1	0.5	4.0	55.7	62,260

Net LDC Place Approvals 2016 - 2024 YTD

Annualised



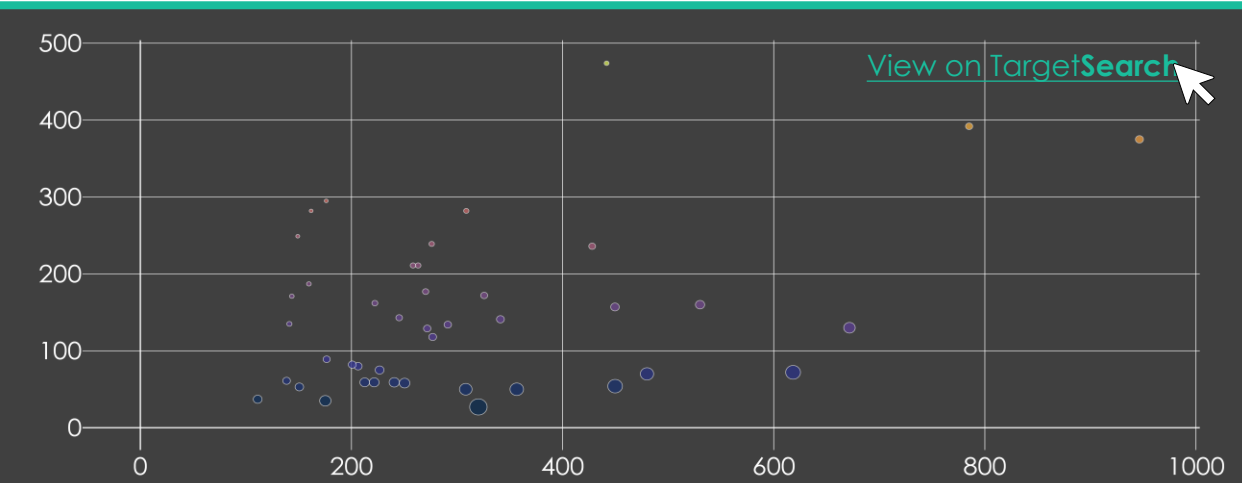
Greater Darwin & Northern Territory

The number of long day care place approvals in NT has been significantly higher than the average observed over the typical 3-month period in the past 5 years, with an increase of 80 registered during this period. This represents a notable rise from the quarterly trend seen over the past 12 months. However, on an annual basis, overall approval rates have been below historical benchmarks. In terms of yearly growth, NT ranked seventh among all states for approval activity. The Northern Territory has 17,625 children under the age of five and a total of 6,715 long day care places. This results in a demand/supply ratio of 2.6 children per place, placing the region third in these terms. Population projections up to 2041 indicate that the metro area will require 1,037 additional places to maintain its current ratio of 2.0. Given that there are approximately 68 places per centre in the NT, this would necessitate the establishment of 13 new centres to meet the projected demand. The region's population has lower-than-average access to child care services compared to other states. On average, residents are located 0.9 km from the nearest centre in metropolitan areas and 8.4 km in non-metropolitan areas. The disparity in supply and demand across SA4 regions in NT is typically less significant compared to other states. Outback is at the higher end of the demand spectrum, with 4.8 children under five per available place. Conversely, the Darwin region has a lower demand, with 2.0 children per place.

	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity
Greater Darwin	69	5,136	5,895	2.0	4.8	123	502
Non-Metro NT	28	1,539	2,327	4.8	10.1	116	1,640

* Kids Per Place

SA2 Population Under 5 (x-axis) vs. LDC Places (y-axis)



2

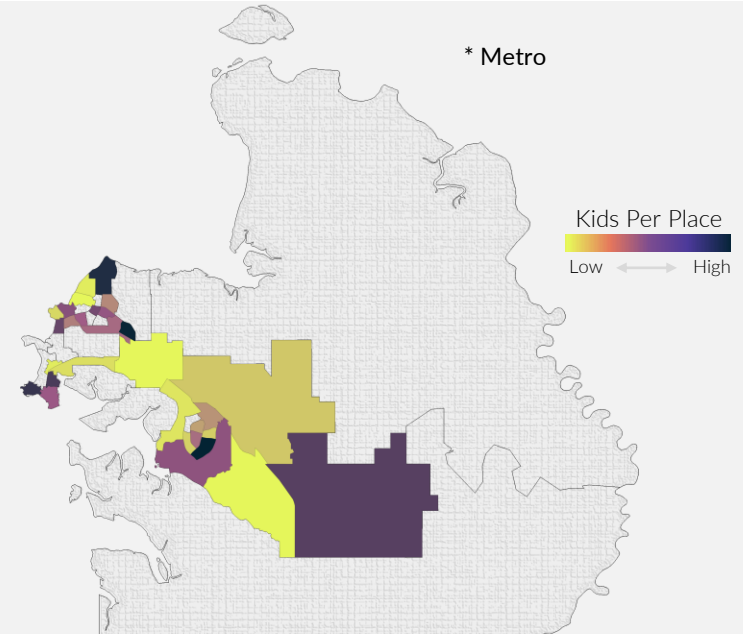
Children Aged Under 5 Per LDC Place

\$123

Average Daily Fee
+9.7% 2yr gr

502m

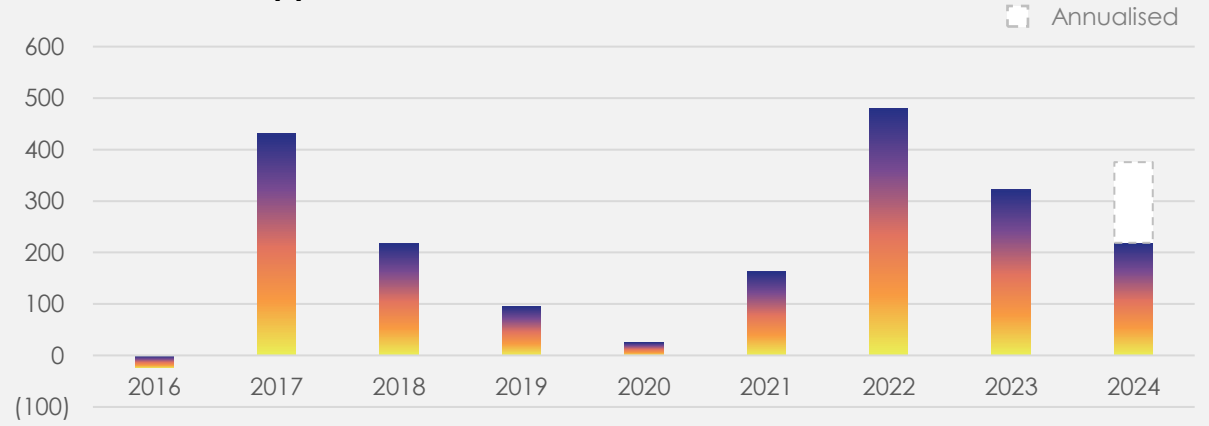
Average School Proximity



Demographic Drivers

Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwelling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
150,968	6.8	7.9	0.2	2.9	69.7	80,424
101,833	7.3	14.3	0.2	5.9	50.7	65,802

Net LDC Place Approvals 2016 - 2024 YTD



Canberra & Australian Capital Territory

The number of long day care place approvals in the ACT has been slightly below the typical figures observed over the past 5 years, with an increase of 138 registered during this period. This indicates a slowdown from the quarterly trend observed over the past 12 months, while overall annual approval rates have remained consistent with historical benchmarks.

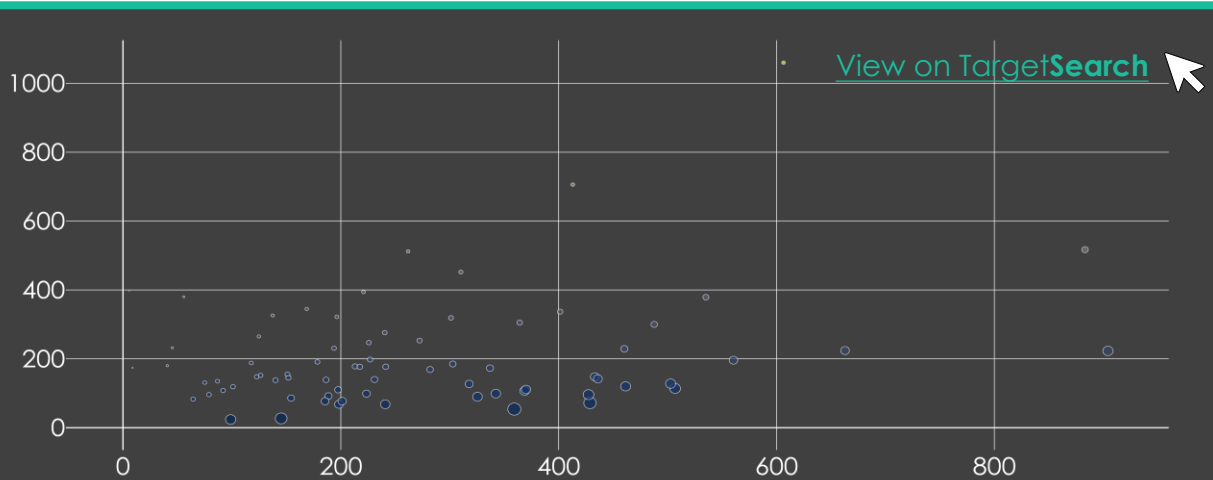
The ACT has a population of 27,656 children under the age of five and offers a total of 15,800 long day care places, resulting in a demand/supply ratio of 1.8 children per place, ranking the region eighth. Projections for population growth up to 2041 indicate that the child population will increase by 22.2%, adding 6,140 children. To maintain the current ratio, an additional 3,507 LDC places will be needed, assuming no existing centres close. With an average of 84 places per centre, this translates to a requirement for 41 new centres.

The region's population enjoys above-average proximity to child care facilities compared to other states, with the typical individual located just 0.8 km from the nearest child care centre.

	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity
Australian Capital Territory	186	15,800	15,061	1.8	4.9	146	593

* Kids Per Place

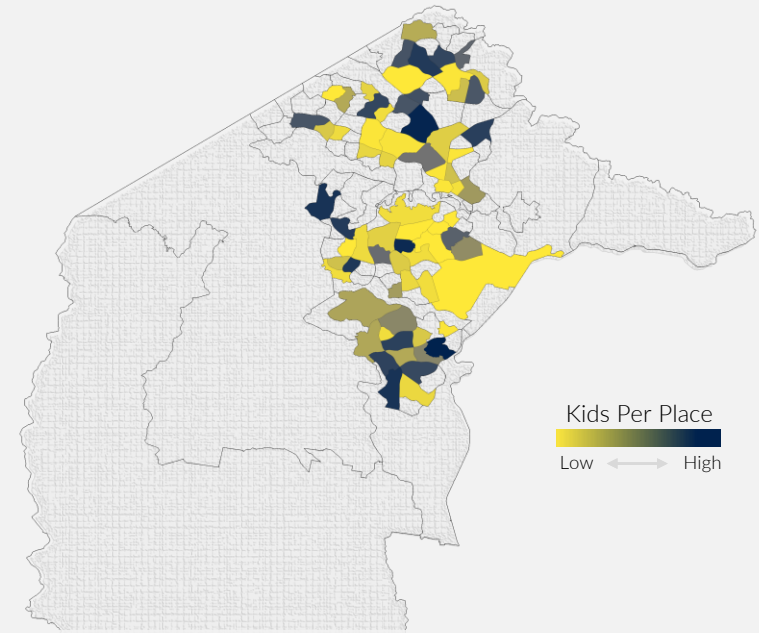
SA2 Population Under 5 (x-axis) vs. LDC Places (y-axis)



1.8
Children Aged Under 5 Per LDC Place

\$146
Average Daily Fee
+15.2% 2yr gr

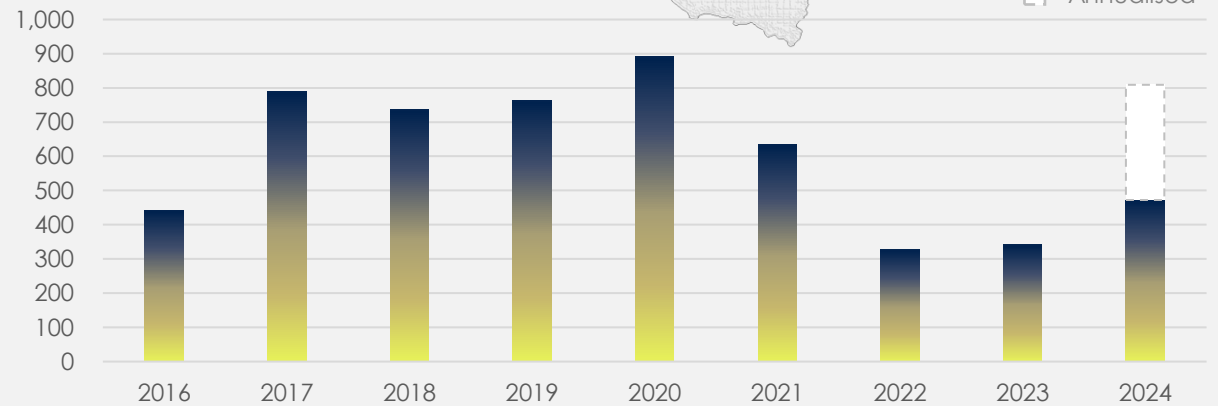
593m
Average School Proximity



Demographic Drivers

Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwelling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
471,154	5.9	3.8	1.1	3.6	69.6	89,141

Net LDC Place Approvals 2016 - 2024 YTD



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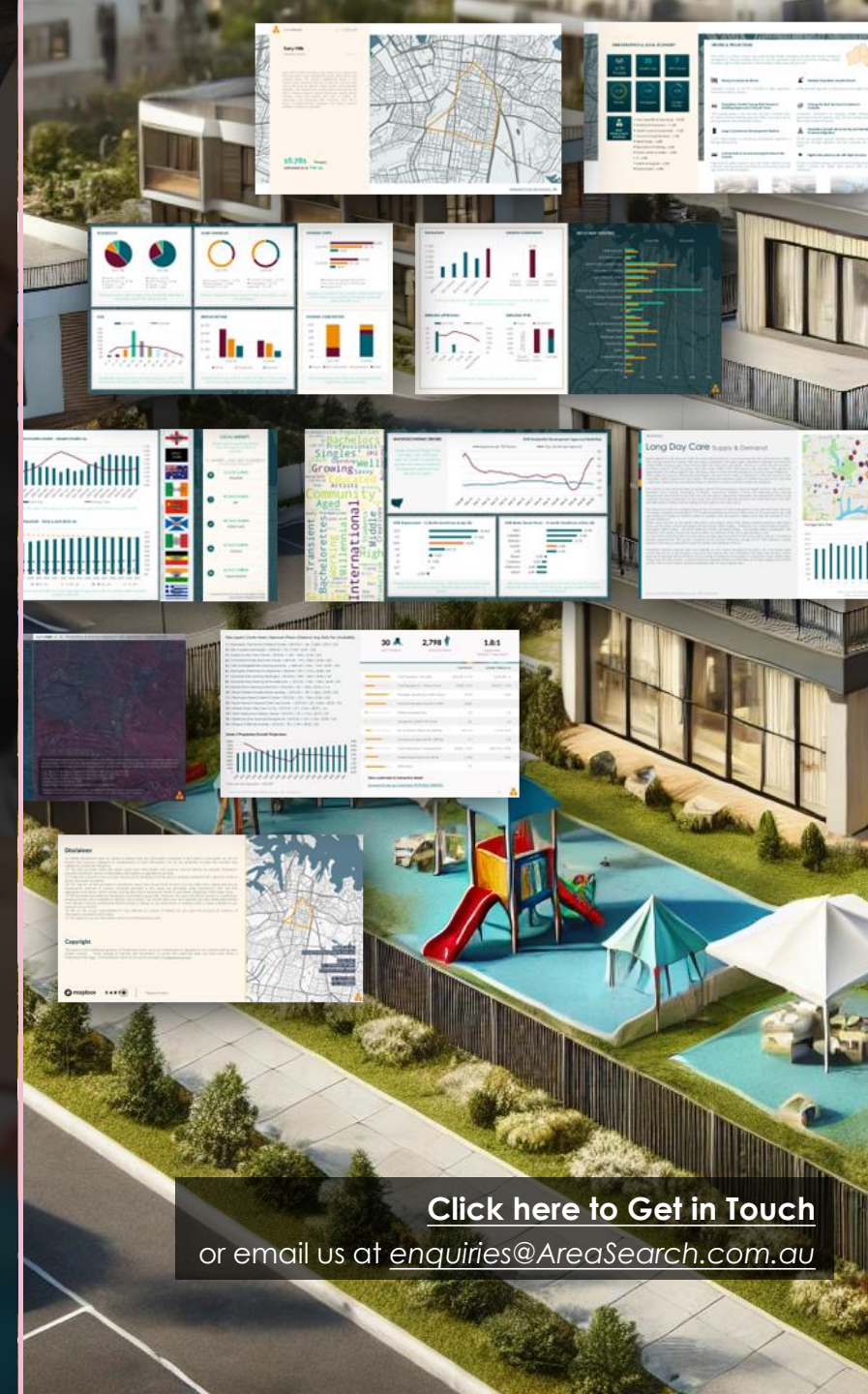
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Data as at Jul-24:

Childcare:	Jul-24
Schools:	Jun-23
Population:	May-24
Development:	Apr-24
Employment:	Dec-23
Income:	2021 Census



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A dark-themed map of Pymont, NSW, Australia, showing a street grid. A yellow location pin is placed on the map, indicating the office location. The map is overlaid on a background image of hands holding a globe.

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