*in*Colour

October-24

Interact: AreaSearch.com.au/incolour/childcare

RE CHILD 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..

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About Area**Search**

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

MPG
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.

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About This Report

This report provides an up-to-date overview of Australia's long day care sector, assisting investors and operators in aligning their services with the needs of Australian families. Our analysis examines the variations in supply and demand dynamics across different states and subregions. We evaluate net additions of long day care places and compare these with August 2024 local population data, school locations, and other relevant factors. Users can access detailed assessments 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 of up to 95% are available to some parents, reflecting bipartisan support for the sector. Nonetheless, challenges persist regarding costs, staffing, and access to care, which can be exacerbated when resources are geographically misallocated due to inadequate network planning.

Our analysis of the latest data from ACECQA reveals that Australia currently has 2.5 children under the age of five for each Long Day Care (LDC) place. With this age group projected to grow by 16% (274,816 children) by 2041, an estimated 109,514 additional places and 1,476 new centres will be needed, assuming the current ratio of 74 places per centre remains constant. Regional disparities are notable. For instance, Melbourne's Inner South, one of the country's most well-supplied areas based on both resident and school-based demand, has 1.49 children and 4.65 school places per LDC place. In contrast, Perth's North East has 3.14 children and 7.6 school places per LDC place.

While local assessments of 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 offer insight into both the volume of opportunities and risks across states and subregions. We have also included some recent and upcoming market opportunities, along with commentary on rental dynamics observed over recent years.

Click for interactive detail

Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

9,215
Long Day Care Centres

27,566
2024 Place Approvals

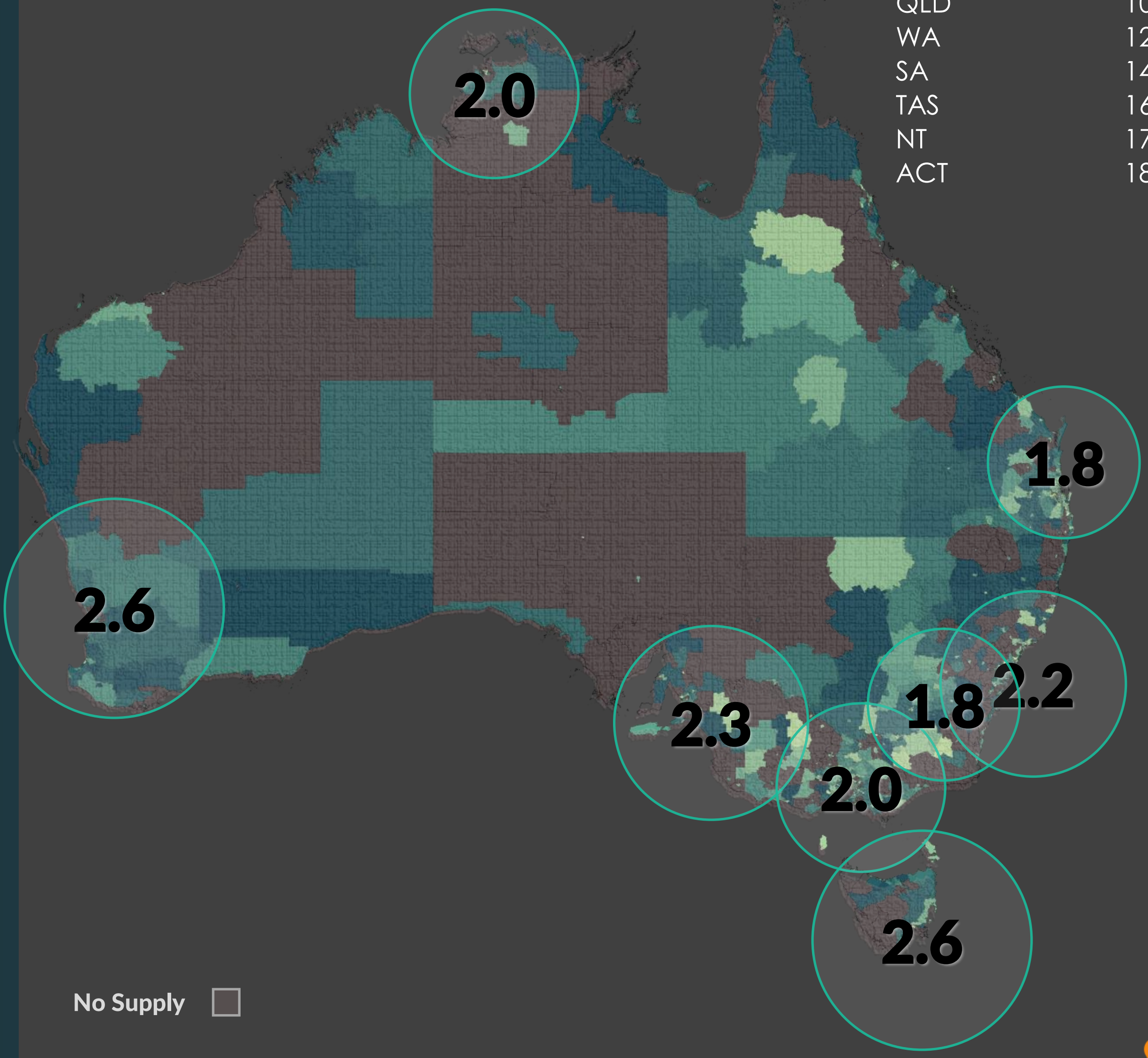
2.3
Supply Ratio: Kids Per Place

555m
Distance to Schools

$141
Daily Fee *

c.$3,400
Rent Per Child

Kids Per Place LDC By City



No Supply

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

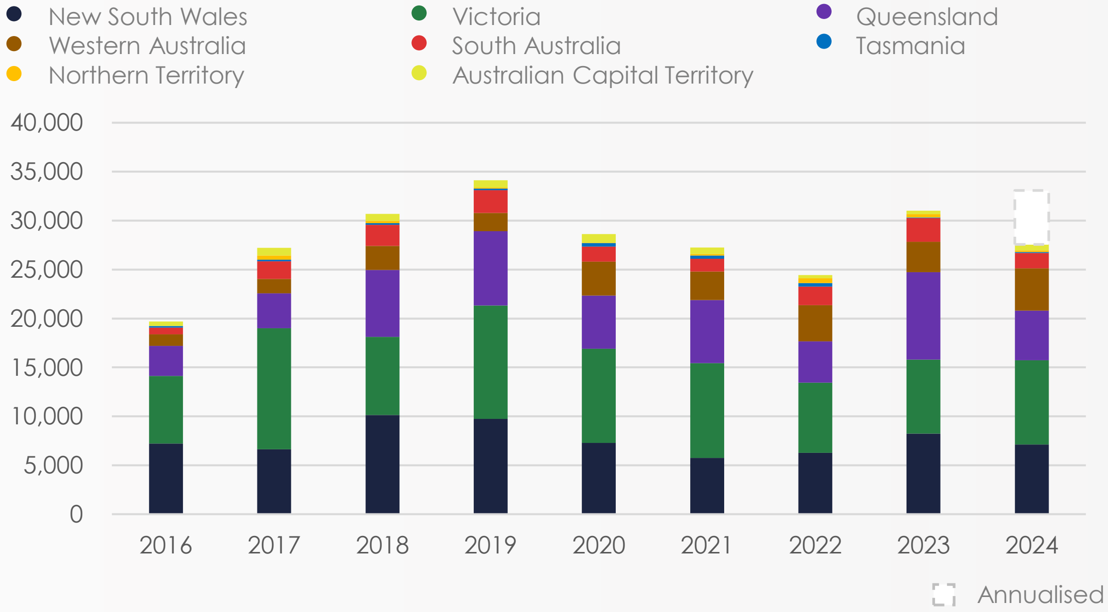
State & City Trends

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

In the last quarter, Australia experienced a significant rise in the approval of new long day care places, with 10,645 places registered, surpassing the five-year average. VIC has been at the forefront in terms of total approval volumes, whereas ACT has experienced the highest approval rate compared to its five-year average.

Over the past five years, rents per child have generally ranged from $2,900 to $4,000 nationwide, based on transactions evaluated by AreaSearch with NSW and WA typically exhibiting the highest rates.

The average full day fee for child care varies, with parents in TAS paying $119.5, while those in ACT face an average of $151.5. Over the past two years, the most significant increases in fees have been observed in QLD and ACT, with growth rates of 16.7% and 15.0%, respectively.



Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

2024 LDC place approvals on track to be just above 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. Dwellling 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

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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 83 2km school catchments identified with no LDC supply and 497 schools where the surrounding LDC place ratio is greater than 5 children per place. Additionally, there were 922 schools identified with no LDC supply within 1km, over half of these being located in metro areas.

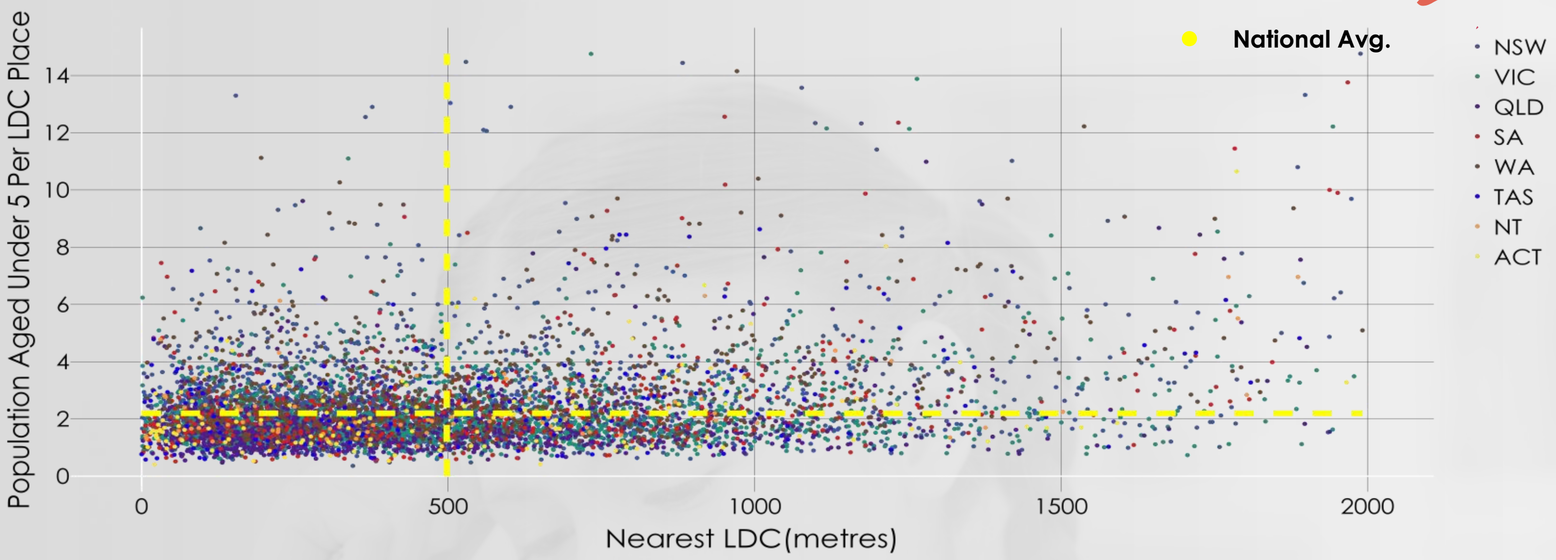
Get your hands on the data

Contact us at:

AreaSearch.com.au/contact

School Catchment Analysis

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



Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

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Greater Sydney & New South Wales

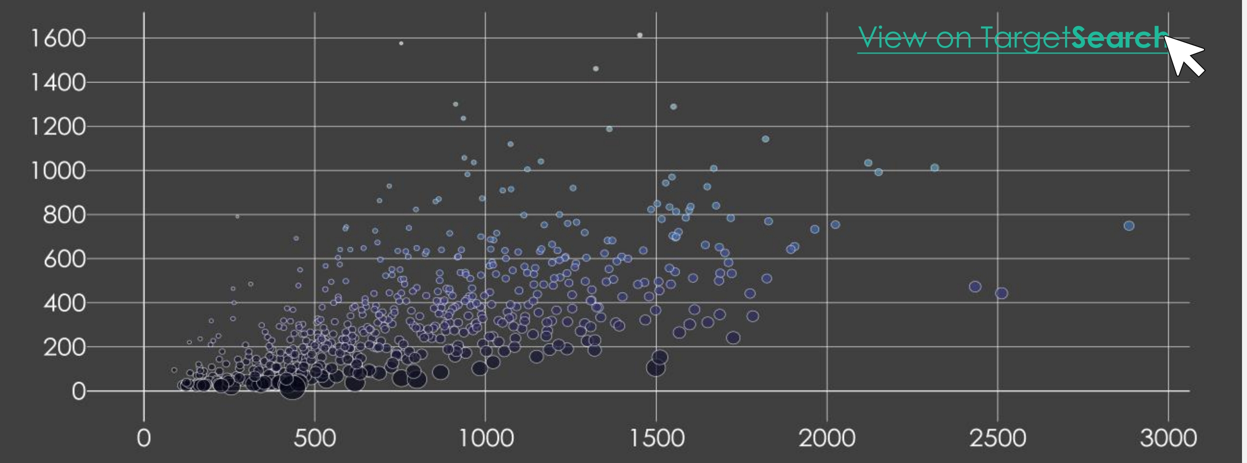
In the last quarter, NSW saw an increase in the approval of new long day care places, with 3,023 places registered. This number exceeds the five-year average and marks a significant rise from the quarterly trend of the past year. Furthermore, annual approval rates have risen considerably compared to historical standards.

NSW has a population of 547,306 children under five years old and offers a total of 209,205 long day care (LDC) places. The current demand/supply ratio is 2.6 children per LDC place, placing it fifth among the states. To maintain this ratio by 2041, considering projected population growth and assuming no closures of existing centres, an additional 27,824 LDC places will be required, mainly in metropolitan areas. With an average of 58 places per centre, the smallest average size among the states, this would require the establishment of 472 new centres.

The region's population is generally well served in terms of distance compared to other states. Typically, residents are located 0.4 km from their nearest centre in metropolitan areas and 14.8 km in non-metropolitan regions. However, there is notable variation in this metric at a subregional level.

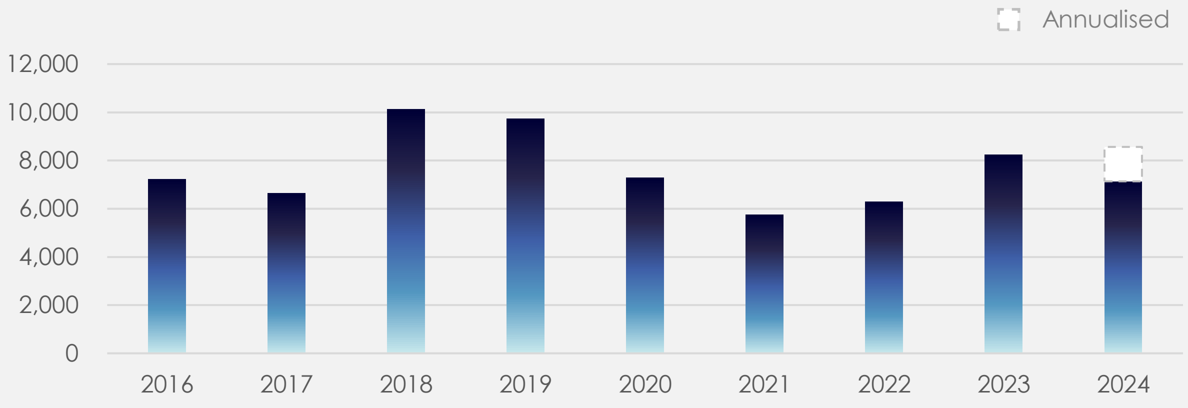
The disparity between supply and demand across SA4 regions in NSW is more pronounced than in other states. Regions such as New England & North West and Blacktown exhibit high demand from both resident and school-based populations compared to available services. In contrast, the City & Inner South region shows lower demand relative to the supply of services on these bases, though offset to a high degree by strong commercial/workforce drivers.

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



View net approvals by SA4 Region

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	2,527	145,481	104,441	2.2	5.7	144	470
Baulkham Hills and Hawkesbury	139	9,870	6,491	1.5	5.0	150	712
Blacktown	182	10,484	10,112	3.0	7.0	133	482
City and Inner South	140	9,010	5,654	1.7	3.5	160	383
Eastern Suburbs	129	6,878	6,526	2.0	5.5	169	341
Inner South West	321	14,500	7,712	2.6	5.6	130	381
Inner West	142	8,627	6,911	1.8	5.0	157	330
North Sydney and Hornsby	211	12,622	11,973	1.7	6.0	168	453
Northern Beaches	106	7,239	6,393	1.9	5.6	155	452
Outer South West	155	9,638	5,391	2.4	5.4	131	608
Outer West and Blue Mountains	159	9,643	6,707	2.3	5.6	130	558
Parramatta	261	13,676	7,525	2.5	5.5	134	418
Ryde	91	5,884	5,593	1.8	5.3	162	492
South West	223	12,490	6,665	2.7	7.4	132	492
Sutherland	131	6,365	5,527	2.1	5.9	140	407
Central Coast	137	8,555	5,261	2.4	6.1	140	656
Non-Metro NSW	1,026	63,724	45,763	2.6	6.6	133	719

* Kids Per Place

Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

A few interesting areas ..

areasearch.com.au/nsw/denham_court_bardia

areasearch.com.au/nsw/epping_east_north_epping

areasearch.com.au/nsw/auburn_central

areasearch.com.au/nsw/bankstown_south

Demographic Drivers

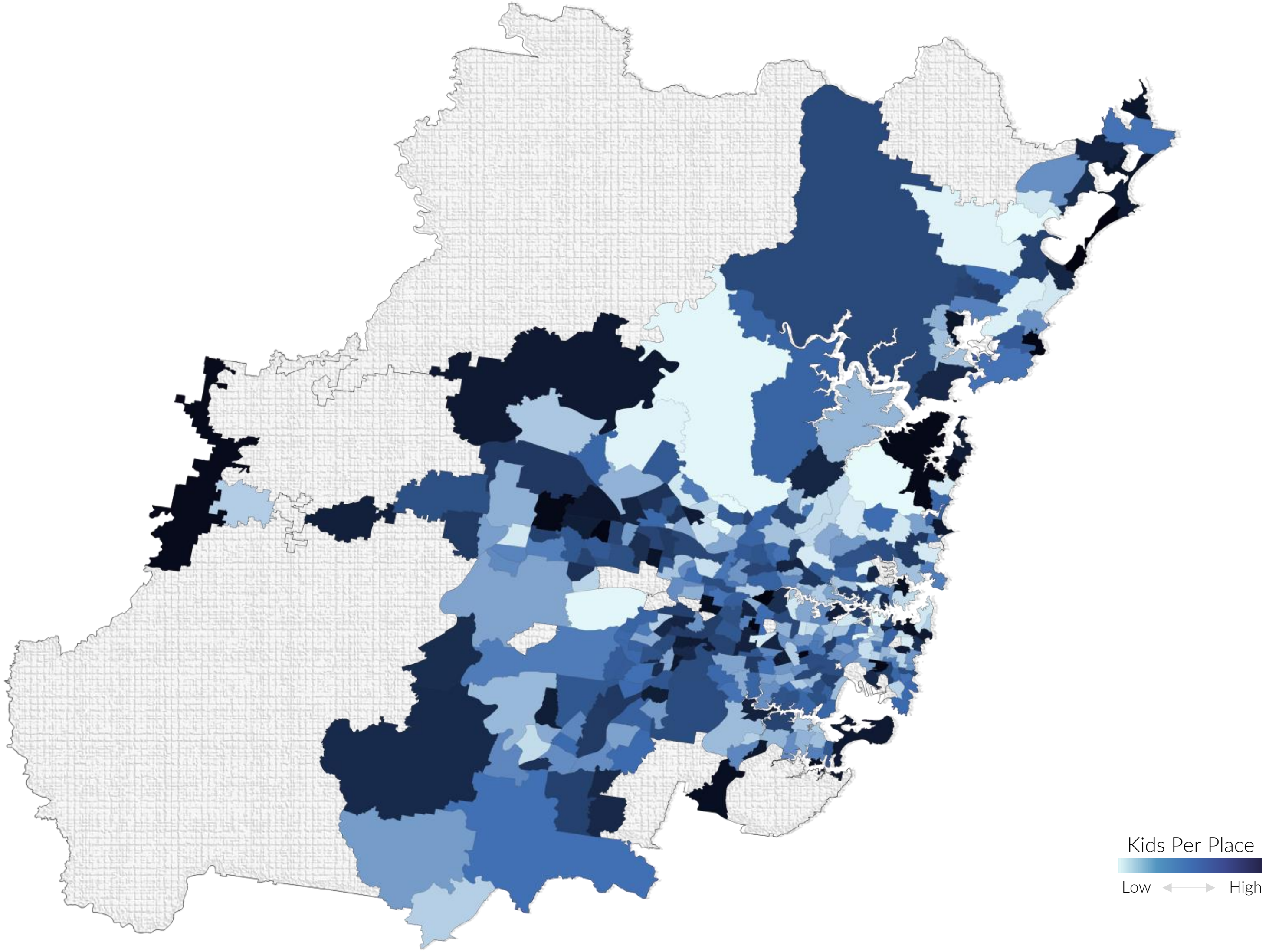
Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwellling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
5,502,120	6.0	5.2	0.6	3.9	60.0	87,111
287,503	5.5	8.8	1.2	2.7	65.3	93,113
436,636	7.6	8.9	0.8	4.7	60.6	70,644
359,551	4.1	8.5	0.4	4.6	68.2	100,612
274,419	5.1	5.0	0.3	4.1	65.2	155,010
625,425	6.1	3.4	0.4	4.1	52.8	66,379
316,583	5.1	3.9	0.4	3.3	64.3	97,966
439,118	5.1	3.6	0.4	3.5	65.1	132,310
268,344	5.4	1.8	0.3	2.4	65.5	120,275
316,915	7.4	6.6	0.7	4.6	60.5	68,534
344,081	6.6	3.6	0.5	3.3	61.4	72,293
521,529	6.7	5.7	0.6	4.2	54.5	65,298
211,876	5.3	4.9	0.9	3.5	63.1	94,950
510,219	6.8	7.5	0.9	5.3	49.5	64,028
236,229	5.8	2.9	0.5	2.4	64.5	92,138
353,692	5.6	2.1	0.4	3.0	55.7	70,025
2,917,986	5.5	3.1	0.6	3.3	56.4	67,872

* Metro

2.2
Children Aged Under 5 Per LDC Place

$144 +12.2% 2yr growth
Average Daily Fee

470m
Average School Proximity



Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

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Greater Melbourne & Victoria

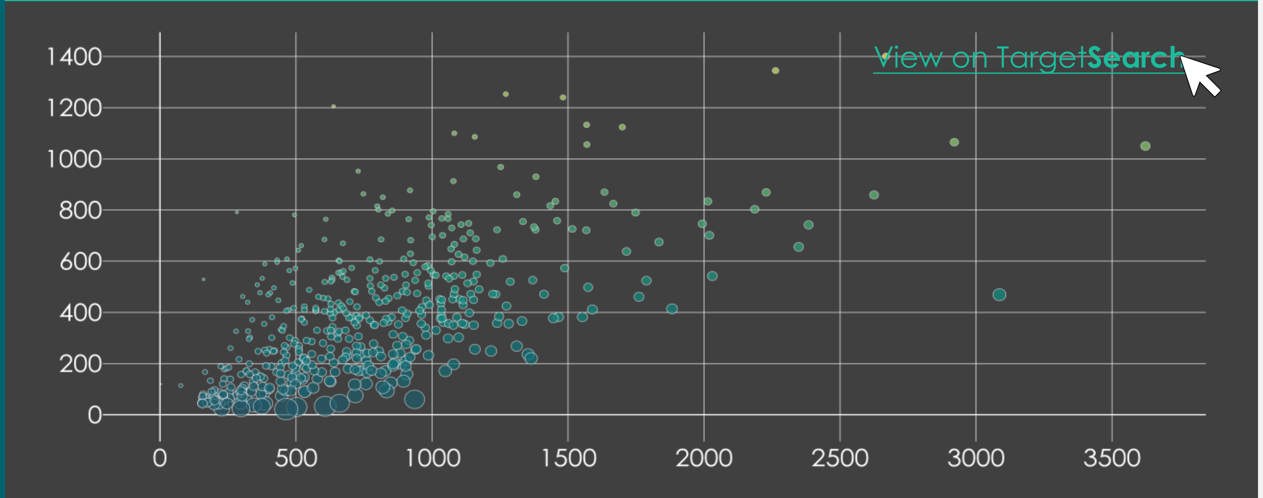
In Victoria, the number of long day care place approvals has seen a notable increase, with 3,099 new places registered over the latest quarter. This marks a significant rise compared to the quarterly trend of the past year, while annual approval rates have remained consistent with historical patterns.

Victoria is home to 439,366 children under five, with 182,649 long day care places available, resulting in a demand/supply ratio of 2.4 children per place. This ranks sixth among the states. To maintain this ratio amidst projected population growth through 2041, an additional 30,319 long day care places will be needed, assuming no closures of current centres. Most of this demand is expected in metropolitan areas. With an average of 91 places per centre, the largest among the states, approximately 329 new centres will be necessary to meet this demand.

In terms of accessibility, the population in Victoria generally enjoys better-than-average access to child care compared to other states. On average, residents are situated 0.5 km from the nearest centre in metropolitan areas and 2.4 km in non-metropolitan areas, with further variations at the subregional level.

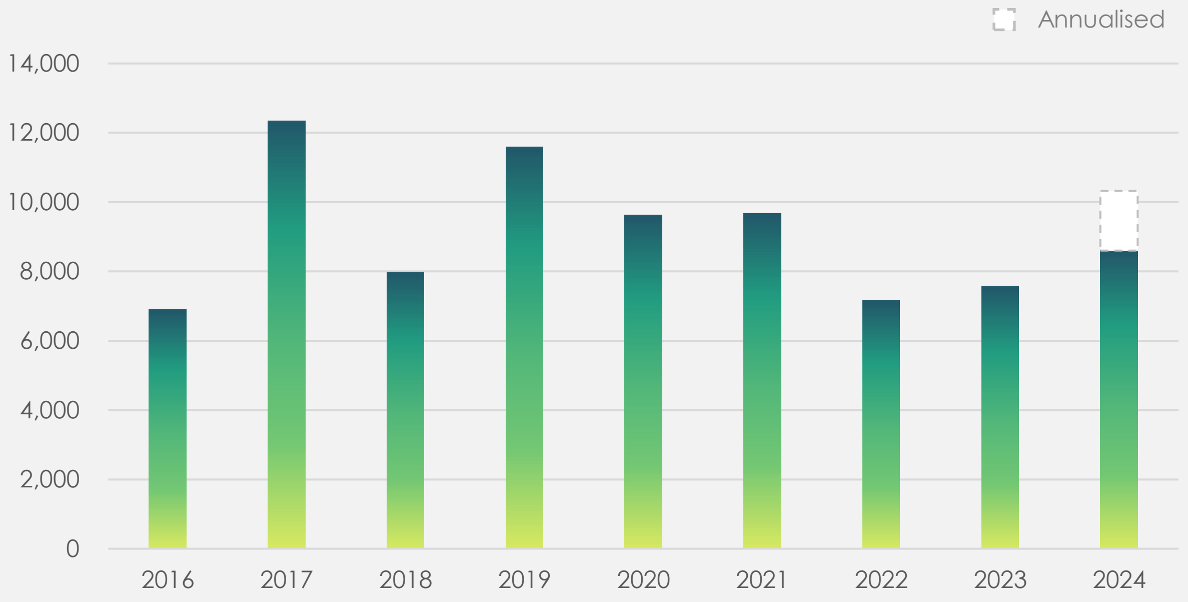
The Warrnambool & South West region stands out with a 'children per place' metric of 3.3. In this area, the ratio of school places to long day care places is a high 9.4.

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



View net approvals by SA4 Region

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	1,579	145,299	114,704	2.0	5.4	149	497
Inner	191	15,747	11,233	1.6	4.9	159	368
Inner East	117	9,768	8,292	1.6	6.7	161	470
Inner South	151	13,885	10,548	1.5	4.7	161	442
North East	166	16,231	14,600	2.1	5.1	146	476
North West	122	11,749	10,076	2.6	6.6	146	558
Outer East	163	13,637	11,934	2.1	5.6	148	512
South East	282	26,059	20,566	2.2	5.6	143	508
West	292	30,146	21,383	2.2	5.1	146	553
Mornington Peninsula	95	8,077	6,072	2.0	5.7	146	600
Non-Metro Vic.	408	37,350	36,032	2.4	6.6	138	566

* Kids Per Place

Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

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A few interesting areas ..

areasearch.com.au/vic/tarneit_west_mount_cottrell

areasearch.com.au/vic/dromana

areasearch.com.au/vic/tarneit_north

areasearch.com.au/vic/cranbourne_east_south

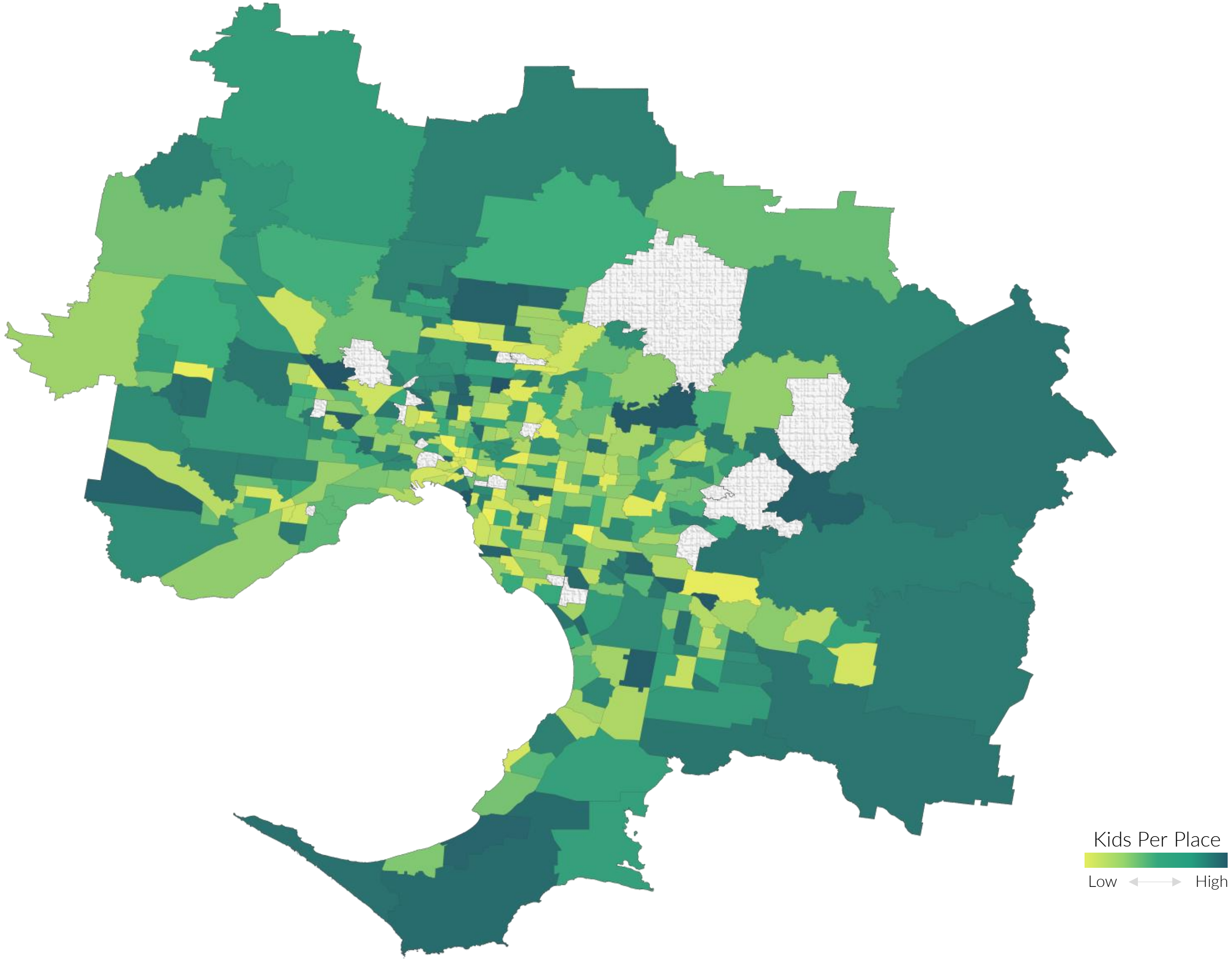
Demographic Drivers

Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwellling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
5,248,562	5.9	6.7	0.8	4.2	64.1	78,974
678,330	4.0	9.9	0.9	4.4	71.1	100,767
394,096	4.2	5.5	0.5	4.1	62.0	98,809
441,770	5.0	4.5	0.6	2.8	66.1	105,525
573,501	6.4	6.1	0.9	4.3	64.1	73,244
452,837	7.1	6.7	0.9	5.3	60.6	68,200
530,212	5.6	2.3	0.4	3.7	64.6	72,579
923,691	6.6	7.4	0.8	4.1	62.4	66,206
939,948	7.4	10.2	1.3	4.7	63.6	68,474
314,177	5.4	1.9	0.4	3.3	58.9	75,240
1,616,522	5.4	2.5	0.7	3.4	57.4	64,982

2
Children Aged Under 5 Per LDC Place

$149 +14.9% 2yr growth
Average Daily Fee

497m * Metro
Average School Proximity



Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

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Greater Brisbane & Queensland

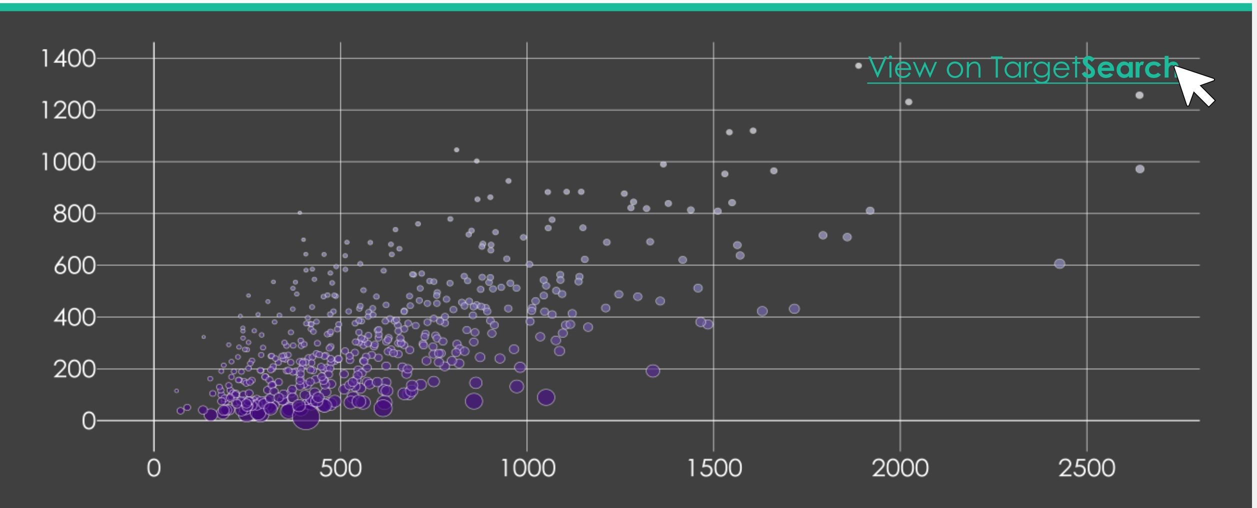
In the last quarter, Queensland saw a substantial increase in new long day care place approvals, with 2,309 places registered. This number is significantly above the five-year average and marks a notable rise from the quarterly trend observed over the past year. However, the overall annual approval rates have remained consistent with historical levels.

Queensland has a population of 353,387 children under five and offers 163,623 long day care (LDC) places. The demand-to-supply ratio is 2.2 children per available place, placing the state seventh in this metric. Population growth projections up to 2041 suggest a need for an additional 31,906 LDC places to maintain the current ratio, assuming all existing centres continue to operate. Most of this demand is anticipated in the metropolitan areas. With an average of 86 places per centre in Queensland, approximately 368 new centres would be required to meet this future demand.

The region's population is generally well serviced in terms of distance compared to other states. On average, individuals are located 0.8 km from their nearest centre in metropolitan areas and 3.3 km in non-metropolitan areas, though there is considerable variation at the subregional level.

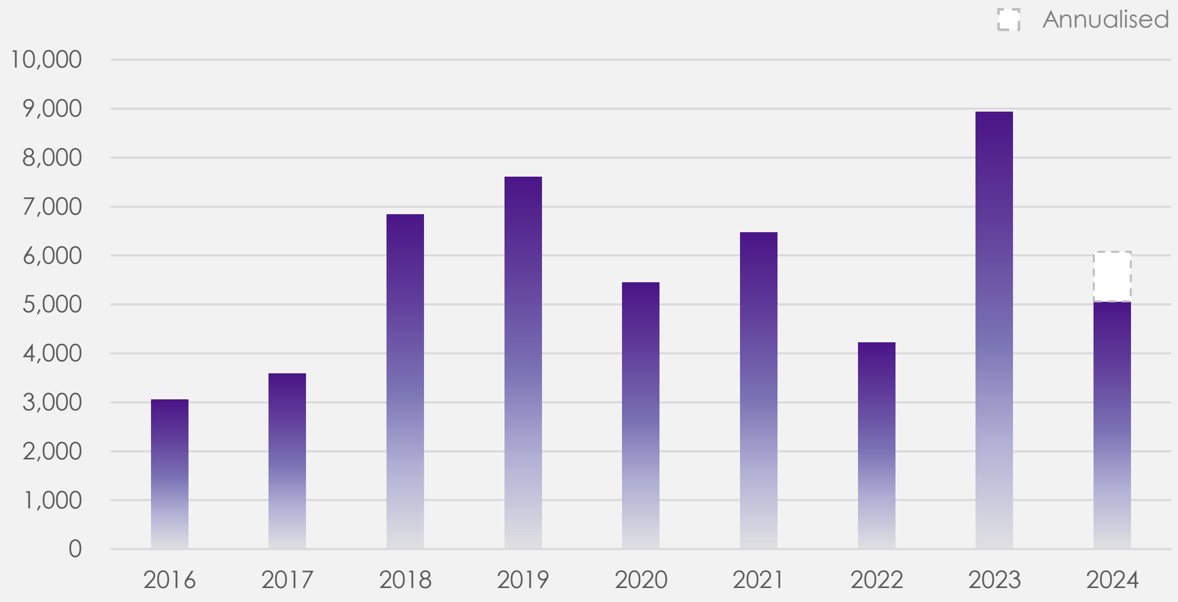
The Outback region was noted for having a 'children per place' metric of 4.7, and a ratio of school places to LDC places at 9.8.

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



View net approvals by SA4 Region

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	987	89,979	53,647	1.8	4.9	141	573
East	81	7,065	4,828	1.9	5.1	134	552
North	83	7,807	5,352	1.8	4.3	146	561
South	138	12,002	9,634	1.9	5.8	146	505
West	75	6,745	5,732	1.4	5.7	146	559
Inner City	111	9,292	5,934	1.4	5.5	154	416
Ipswich	149	13,889	7,199	2.0	4.9	140	643
Logan - Beaudesert	170	15,825	5,722	1.8	4.1	132	602
Moreton Bay - North	92	8,633	4,096	1.8	5.1	137	752
Moreton Bay - South	88	8,721	5,150	1.8	3.9	141	561
Non-Metro Qld	902	73,644	38,755	2.1	6.1	132	646

* Kids Per Place

Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

A few interesting areas ..

areasearch.com.au/qld/doolandella

areasearch.com.au/qld/kangaroo_point

areasearch.com.au/qld/scarborough_newport

areasearch.com.au/qld/yarrabilba

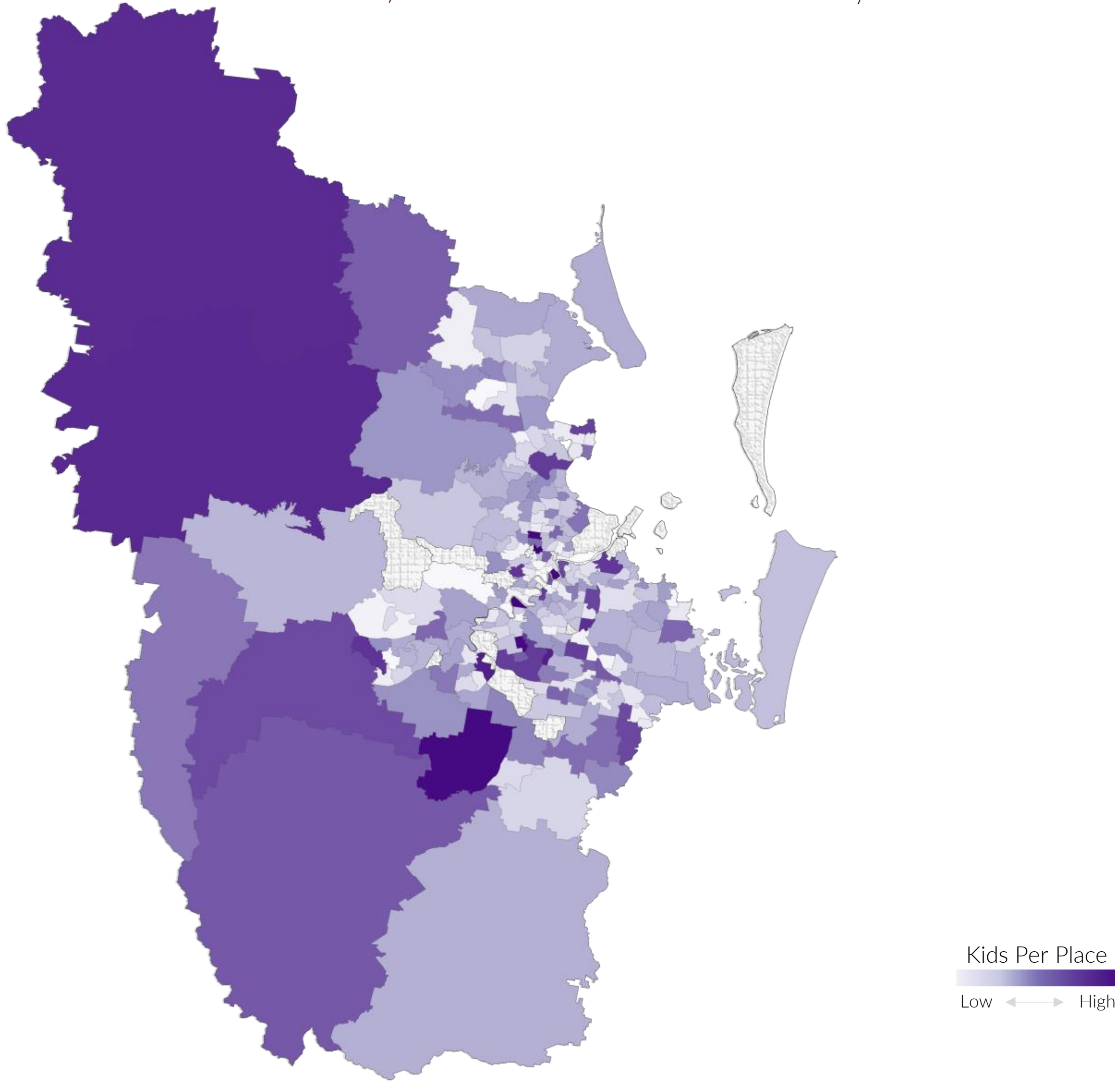
1.8
Children Aged Under 5 Per LDC Place

$141 +17.0% 2yr growth
Average Daily Fee

573m * Metro
Average School Proximity

Demographic Drivers

Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwellling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
2,744,204	6.0	8.6	0.7	4.5	64.5	76,510
251,490	5.5	4.9	0.6	3.2	63.5	78,035
237,106	6.0	5.6	0.3	4.2	67.2	78,572
400,144	5.9	7.9	0.5	3.9	67.3	76,659
199,030	5.1	5.2	0.3	3.1	66.7	97,275
322,051	4.2	10.2	0.9	4.2	72.6	107,841
405,619	7.0	10.5	0.9	5.1	60.9	64,439
402,512	7.1	11.9	1.1	5.2	60.5	62,069
292,003	5.4	10.3	0.9	6.5	54.6	62,926
234,249	6.6	7.6	0.3	4.2	68.6	74,187
2,777,297	5.4	6.2	0.6	3.7	59.1	70,352



Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

Greater Perth & Western Australia

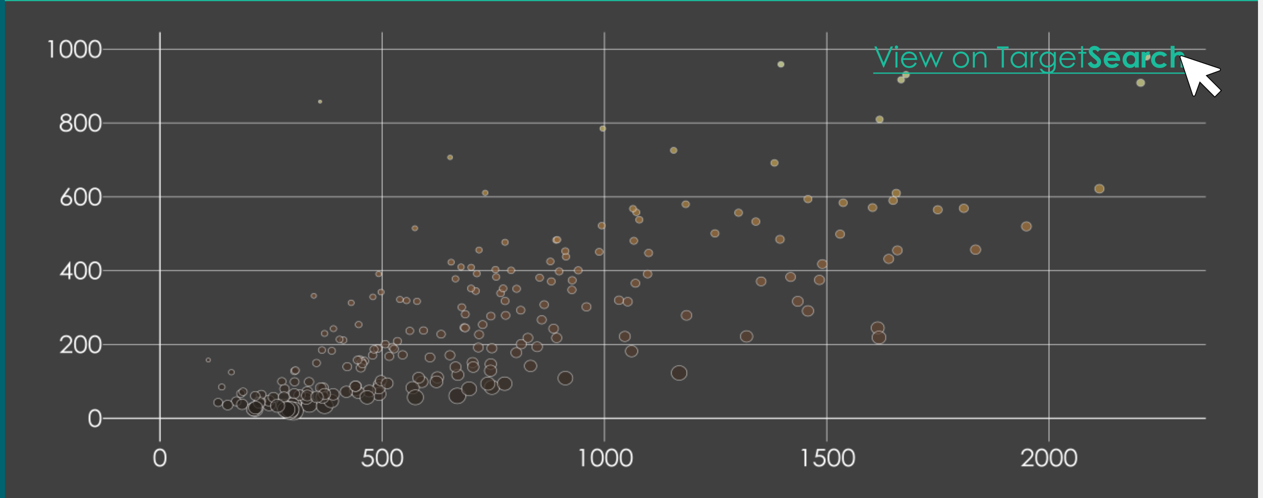
In the last quarter, Western Australia saw a notable increase in new long day care place approvals, with 1,511 places registered, surpassing the five-year average for the same period. This trend indicates a rise compared to the previous year, with annual approval rates exceeding historical benchmarks.

Western Australia, with a population of 188,639 children under 5, provides 58,718 long day care places, resulting in a demand-to-supply ratio of 3.2 children per place, the second highest in the state. By 2041, the metropolitan region will need 13,742 additional places to maintain this ratio due to a projected 27.2% increase in the child population, adding 41,156 children. With an average of 66 places per centre, 210 new centres will be necessary to meet future demand.

Regionally, access to child care services is below average compared to other states. Residents are, on average, 0.7km from the nearest centre in metropolitan areas and 14.6km in non-metropolitan areas, with variations at the subregional level.

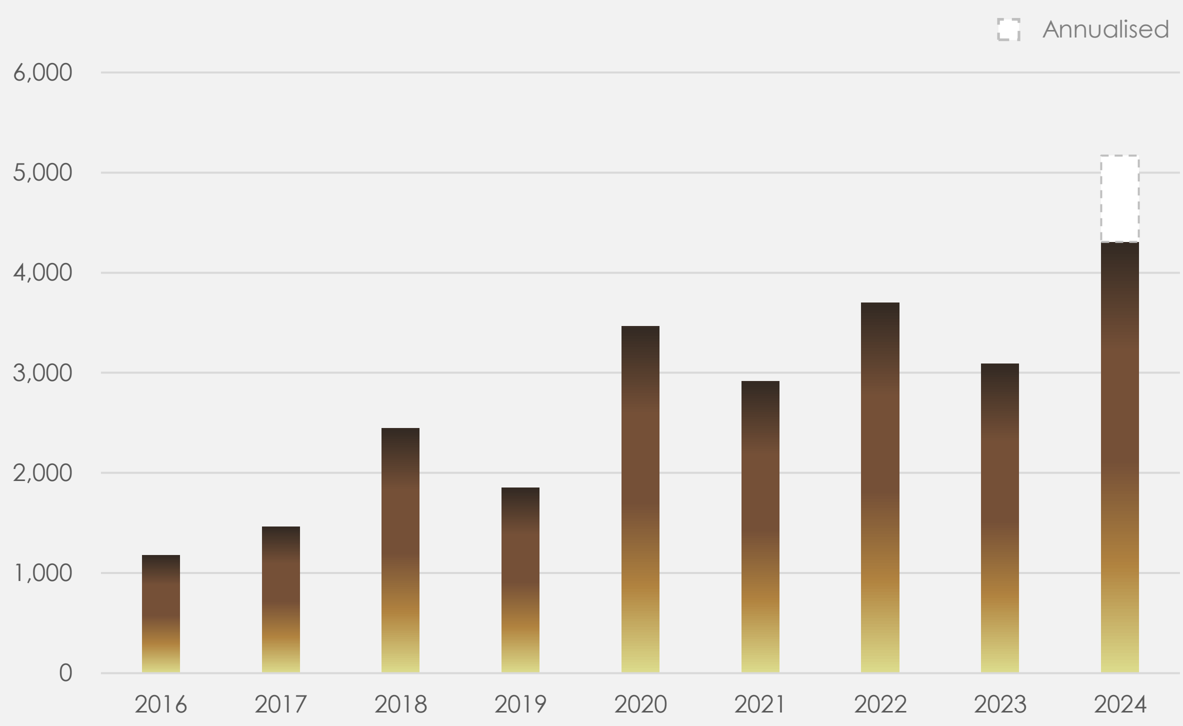
Over the past year, WA's place approvals have been higher than many other states on a per population basis. However, regions like the Wheat Belt and North East face significant supply shortfalls, with 'children per place' ratios of 5.5 and 3.1, respectively. Additionally, the ratio of school places to long day care places is 14.4 and 7.6 in these regions.

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



Net LDC Place Approvals 2016 - 2024 YTD

View net approvals by SA4 Region



	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity
Greater Perth	715	50,525	27,362	2.6	7.5	143	524
Mandurah	33	2,149	780	2.7	8.9	129	660
Inner	67	4,463	2,243	1.8	8.0	156	493
North East	86	5,975	3,502	3.1	7.6	141	591
North West	188	13,388	8,624	2.8	7.8	144	499
South East	183	13,451	6,504	2.6	6.9	141	526
South West	158	11,099	5,709	2.6	7.3	143	501
Non-Metro WA	165	8,193	2,707	4.3	11.4	134	584

* Kids Per Place

Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

A few interesting areas ..

areasearch.com.au/wa/nollamara_westminster

areasearch.com.au/wa/east_perth

areasearch.com.au/wa/piara_waters_forrestdale

areasearch.com.au/wa/casuarina_wandi

Demographic Drivers

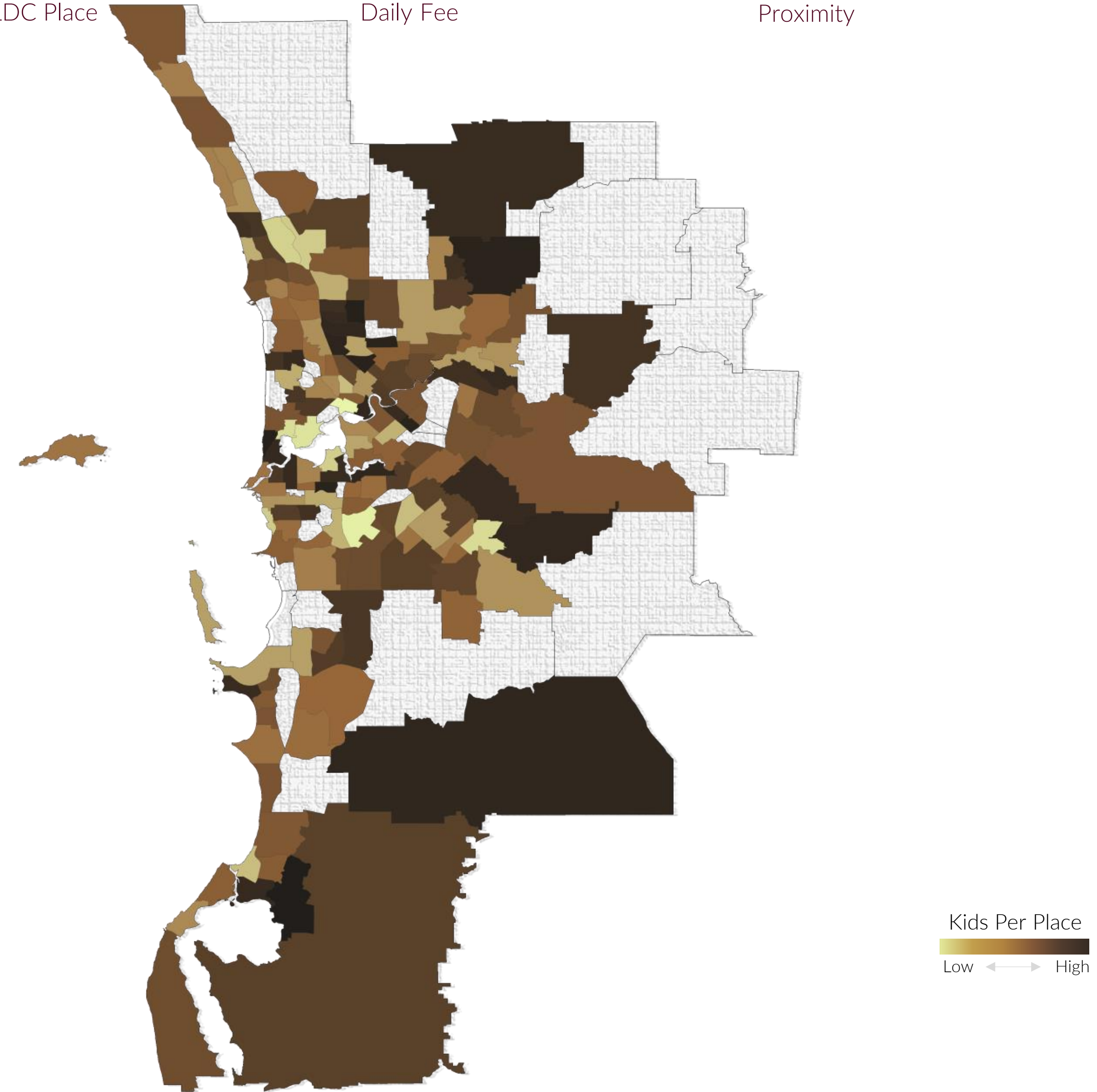
Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwellling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
2,327,813	6.1	10.0	0.6	3.7	65.2	84,658
120,355	5.3	11.8	1.0	3.6	52.2	76,828
201,121	4.5	10.3	0.3	2.4	67.1	137,297
306,166	6.6	10.7	0.7	3.5	65.8	76,547
626,827	6.2	8.6	0.5	4.0	66.9	81,517
583,104	6.4	10.1	0.5	4.4	65.0	75,943
490,240	6.3	10.6	0.7	3.3	65.2	84,410
574,178	6.0	7.4	0.4	3.7	59.4	77,217

* Metro

2.6
Children Aged Under 5 Per LDC Place

$143 +15.0% 2yr growth
Average Daily Fee

524m
Average School Proximity



Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

Greater Adelaide & South Australia

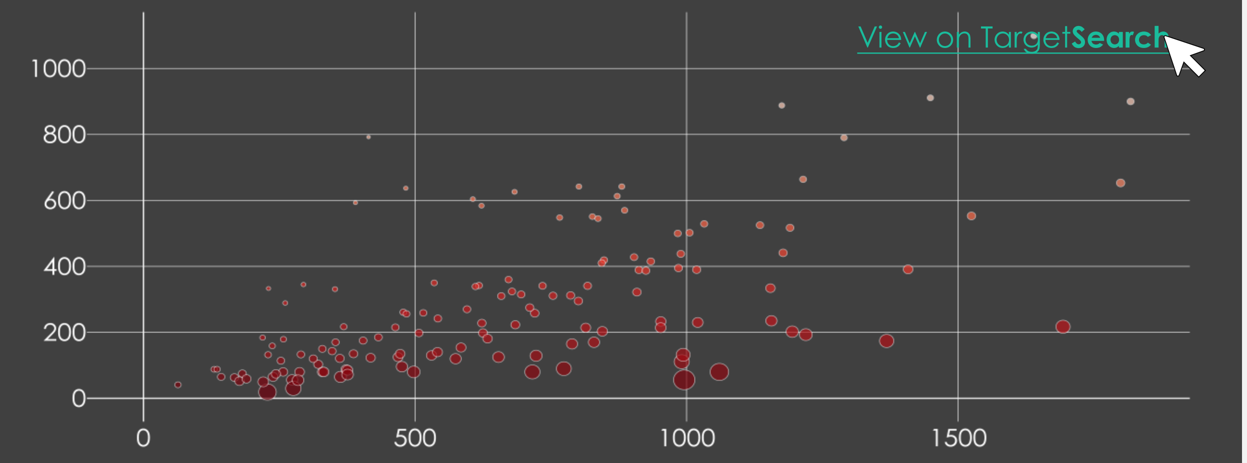
In the last quarter, South Australia saw an increase in new long day care place approvals, with 703 new places registered. This number exceeds the five-year average and shows a slight rise compared to quarterly trend seen over the past year. Annually, approval rates are significantly above historical averages.

South Australia has 106,325 children under five and a total of 39,001 long day care places, resulting in a demand/supply ratio of 2.7 children per place, ranking fourth nationally. Population growth forecasts up to 2041 suggest the metro region will need an additional 3,330 places to maintain the current ratio of 2.5 children per place. Given that each centre in South Australia typically has about 80 places, this would require the establishment of approximately 30 new centres to meet projected demand.

In terms of proximity, the region's population is relatively well serviced compared to other states. On average, individuals are 0.7 km from their nearest centre in metropolitan areas and 5.4 km in non-metropolitan areas, with further variations at the subregional level.

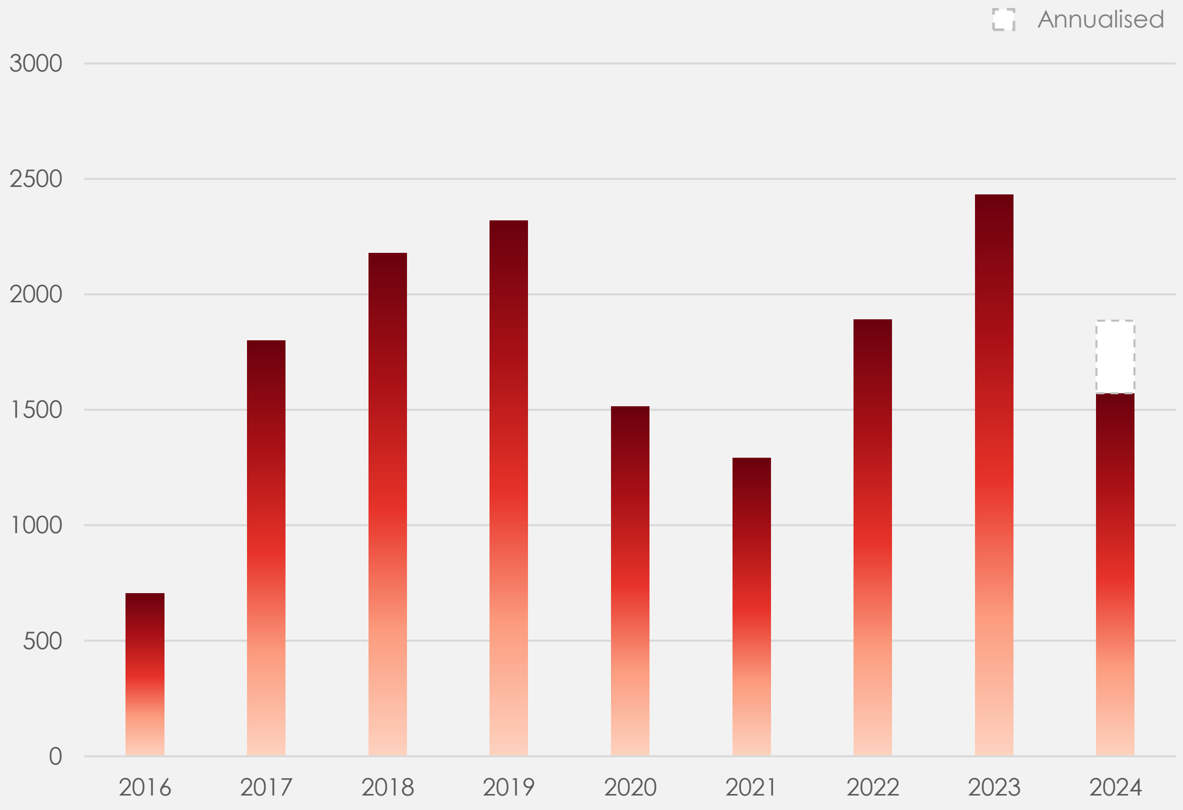
The disparity between supply and demand across SA4 regions is more pronounced than in other states, with areas like Outback and North showing significantly high demand from resident and school-based populations compared to service availability.

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



Net LDC Place Approvals 2016 - 2024 YTD

View net approvals by SA4 Region



	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity
Greater Adelaide	410	33,981	34,327	2.3	6.6	140	461
Central and Hills	109	8,765	9,222	1.7	7.0	138	388
North	123	10,569	11,271	2.9	6.9	139	549
South	112	8,672	8,840	2.3	6.6	142	455
West	66	5,975	4,994	2.3	5.3	142	431
Non-Metro SA	76	5,020	7,901	3.9	11.4	126	425

* Kids Per Place

Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

A few interesting areas ..

areasearch.com.au/sa/davoren_park

areasearch.com.au/sa/craigmore_blakeview

areasearch.com.au/sa/hackham_onkaparinga_hills

areasearch.com.au/sa/rostrevor_magill

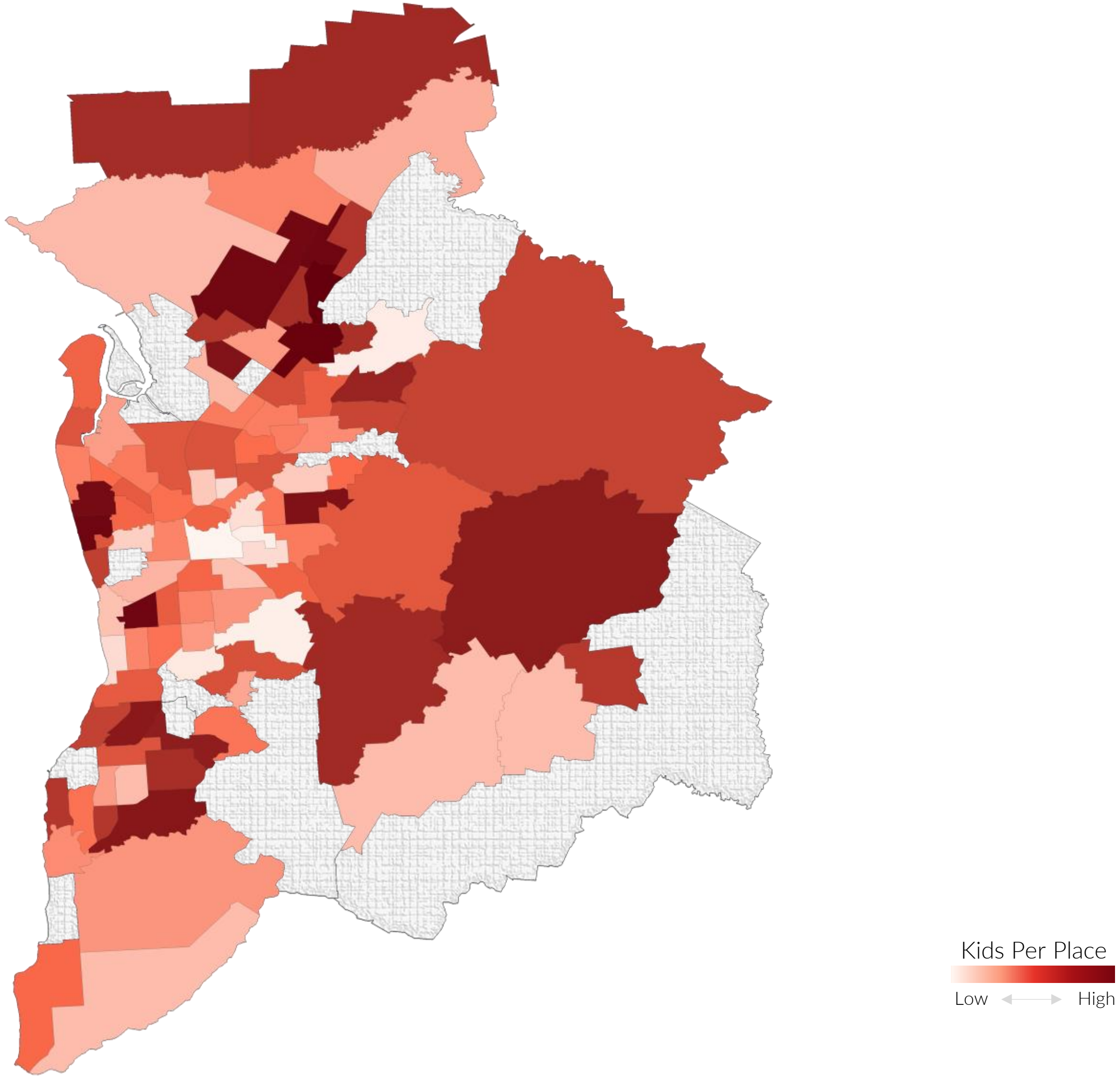
Demographic Drivers

Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwelling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
1,457,295	5.4	5.1	0.7	4.0	61.7	69,927
329,474	4.6	5.5	0.7	3.3	63.4	85,727
482,067	6.3	5.8	0.8	4.8	60.2	60,228
389,146	5.1	3.8	0.5	3.5	61.6	68,951
256,608	5.1	5.0	0.7	4.0	62.5	69,339
408,057	5.0	4.4	0.6	3.4	54.1	60,978

2.3
Children Aged Under 5 Per LDC Place

$140 +12.8% 2yr growth
Average Daily Fee

461m * Metro
Average School Proximity



Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

Greater Hobart & Tasmania

TAS saw no increase in long day care places in the latest quarter, contrasting with the average 3-month growth of 69.65 places over the past five years. TAS ranked eighth among states for approval activity over the past 12 months.

With 33,070 children under five and 9,359 long day care places, Tasmania has a demand-to-supply ratio of 3.5 children per place, the highest among states. By 2041, demand is expected to decrease as the number of children under five declines by 8.4%, or 628 fewer children.

Residents have less access to child care services than other states, with the nearest centre 2.5 km away on average. The supply-demand disparity across SA4 regions in TAS is generally less pronounced than in other states, except for the West & North West region, which has a notable 'kids per place' ratio.

2.6

Children Aged Under 5 Per LDC Place

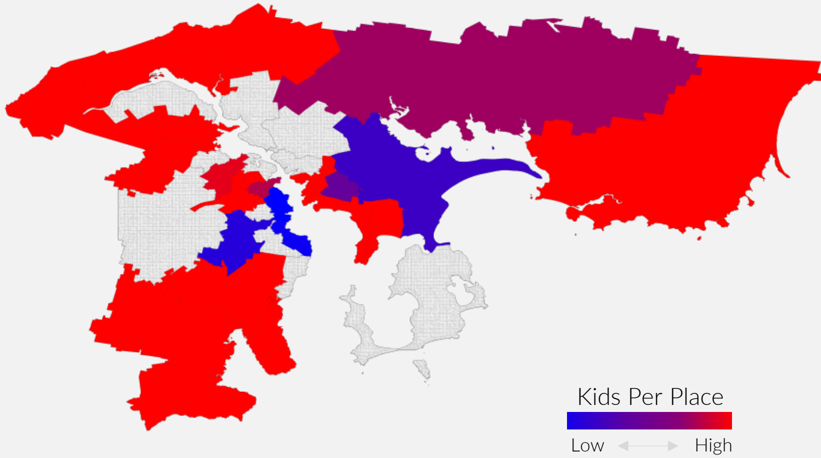
$121

Average Daily Fee

+12.9% 2yr gr

539m

Average School Proximity

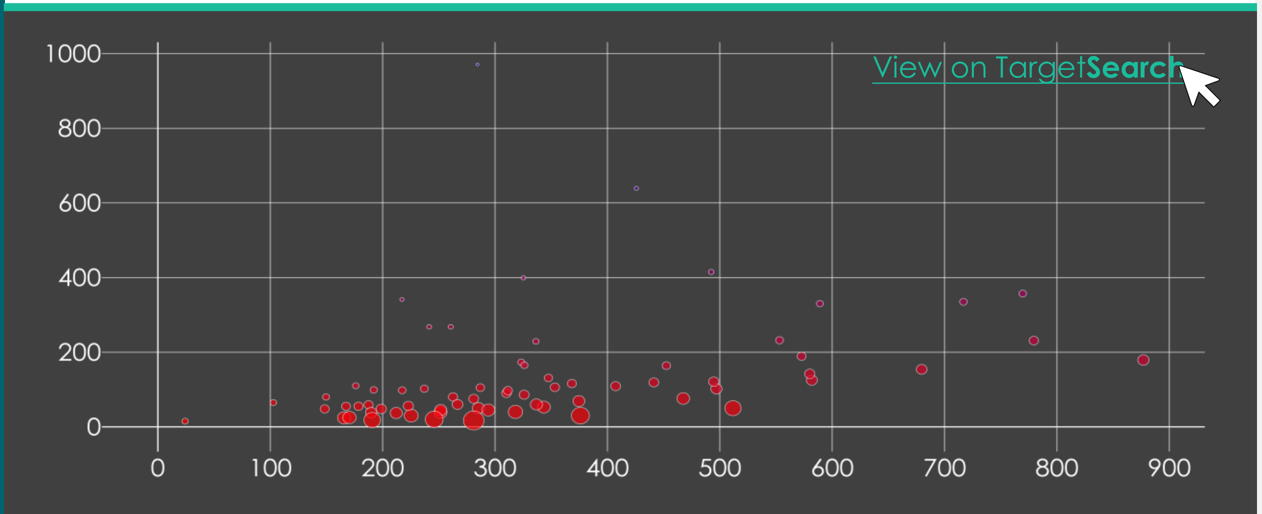


Demographic Drivers

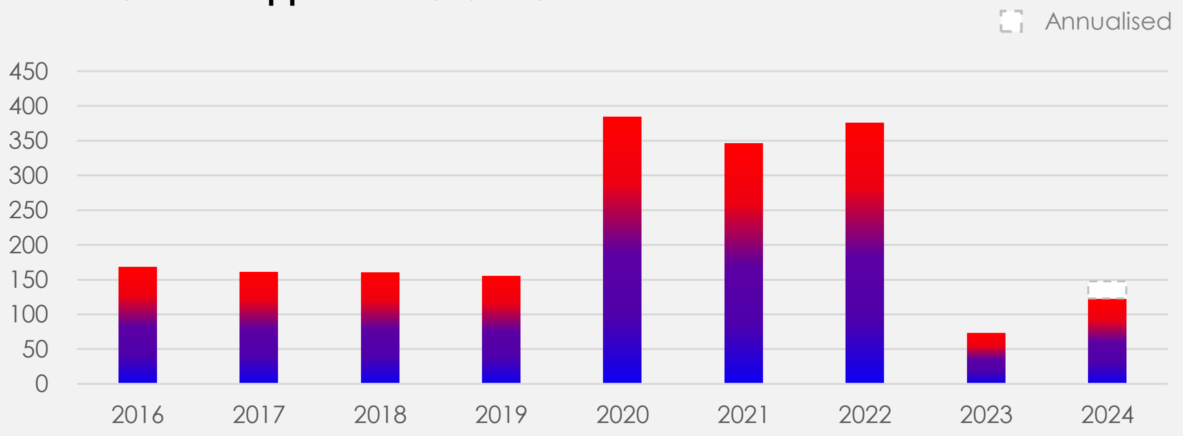
	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity	Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwellling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
Greater Hobart	71	5,304	2,480	2.6	7.6	121	539	257,324	5.2	4.1	0.5	4.3	61.6	69,644
Non-Metro Tas.	69	4,055	2,161	3.9	11.0	117	479	322,851	5.0	4.5	0.5	4.0	55.7	62,663

* Kids Per Place

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



Net LDC Place Approvals 2016 - 2024 YTD



Sources: ABS / ACECQA / ACARA / 2021 Census / NSC / AreaSearch

Greater Darwin & Northern Territory

In the latest quarter, the Northern Territory (NT) saw no increase in the number of long day care places, maintaining the status quo compared to the average of 56.75 places typically added over a three-month period in the past five years. NT ranked seventh among all states in annual approval activity growth.

With 19,490 children under five and 6,677 long day care places, NT has a demand/supply ratio of 2.9 children per place, ranking third in the region. Projections to 2041 indicate NT will need an additional 1,281 long day care places to maintain this ratio, assuming no closures, with most of this requirement (around 18 new centres) being for metropolitan areas.

NT residents have below-average access to child care services compared to other states, with the nearest centre 0.9 km away in metropolitan areas and 8.4 km in non-metropolitan areas. In NT, the disparity between supply and demand in SA4 regions is less marked than in other states. Outback shows higher demand with 4.8 children per place, while Darwin has 2.0 children per place.

2

Children Aged Under 5 Per LDC Place

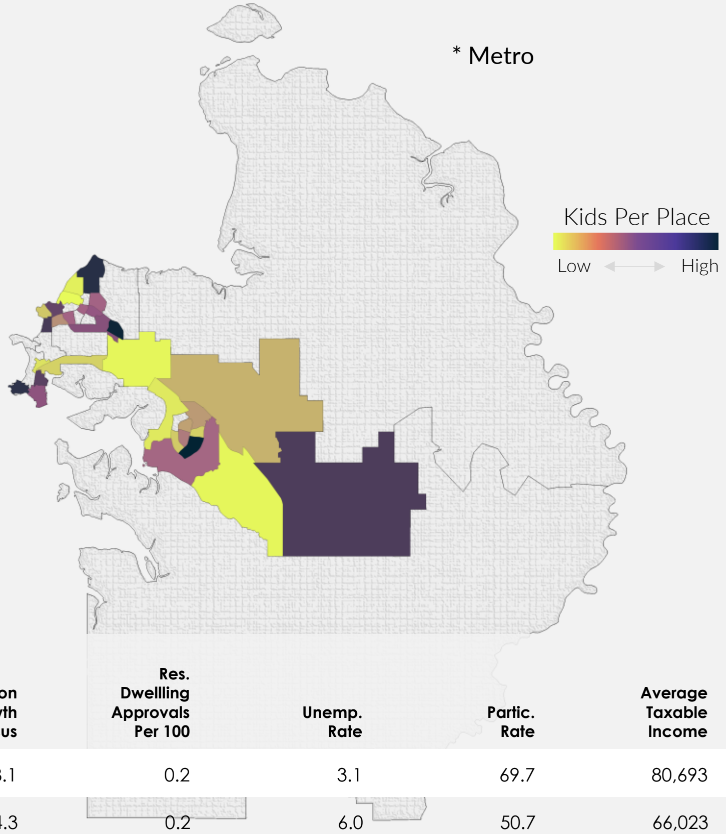
$128

Average Daily Fee

+12.6% 2yr gr

502m

Average School Proximity



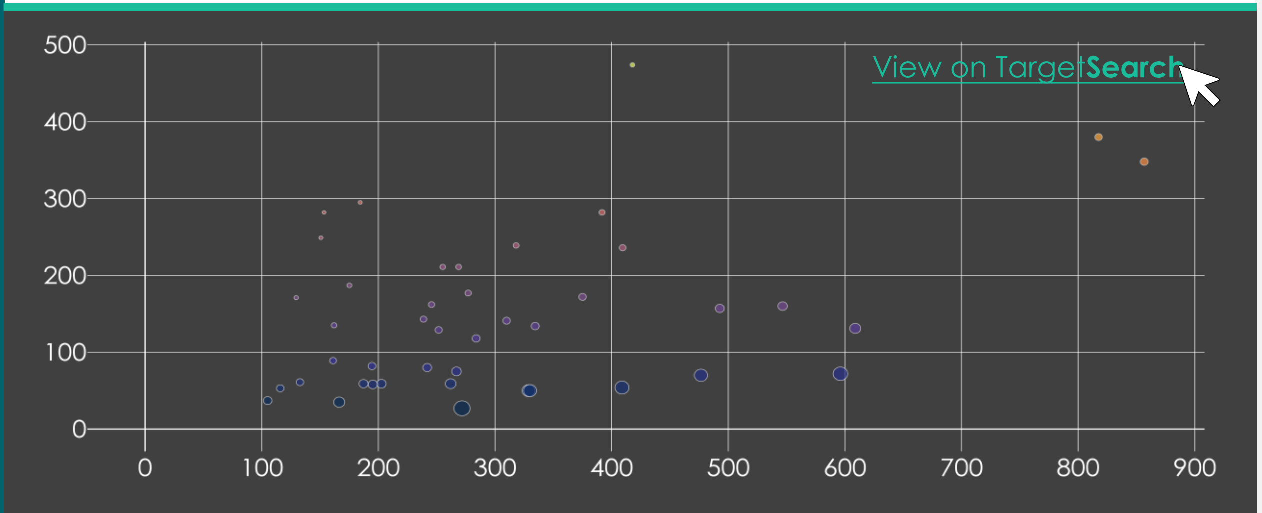
	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity
Greater Darwin	69	5,142	5,895	2.0	4.8	128	502
Non-Metro NT	27	1,495	2,242	4.8	10.4	120	751

* Kids Per Place

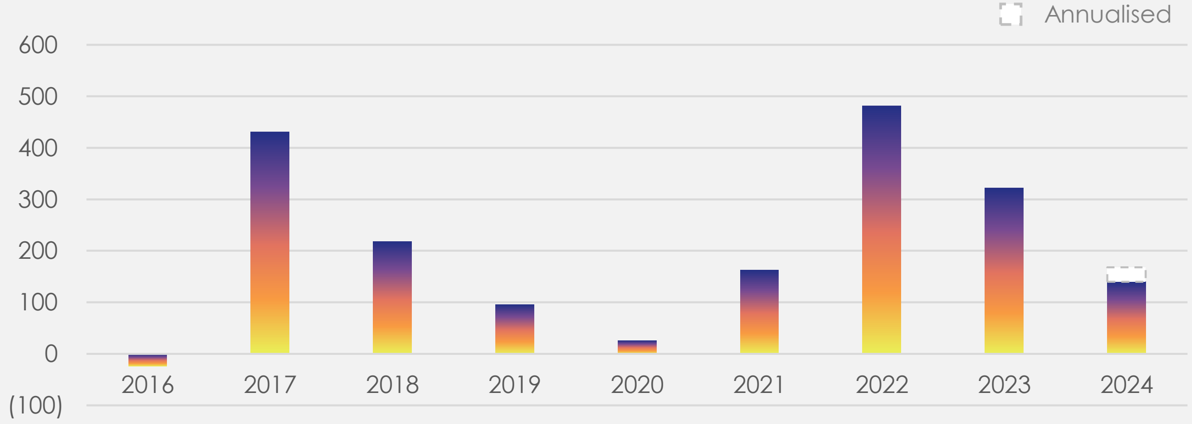
Demographic Drivers

	Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwellling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
Greater Darwin	151,204	6.8	8.1	0.2	3.1	69.7	80,693
Non-Metro NT	101,841	7.3	14.3	0.2	6.0	50.7	66,023

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



Net LDC Place Approvals 2016 - 2024 YTD



October-24

Canberra & Australian Capital Territory

In the latest quarter, the ACT saw no increase in long day care places, unlike the average 3-month growth of 156.05 places over the past five years. With 31,255 children under 5 and 15,726 long day care places, the ACT has a demand/supply ratio of 2.0 children per place, ranking it eighth among regions for this metric.

By 2041, the child population is projected to grow by 16.9%, adding 5,283 children. To maintain the current ratio, 2,657 new long day care places will be needed. This requires around 31 new centres, assuming no closures, as each typically accommodates 85 places.

Conveniently, the region offers better-than-average access to child care, with residents on average just 0.8km from the nearest centre.

1.8

Children Aged Under 5 Per LDC Place

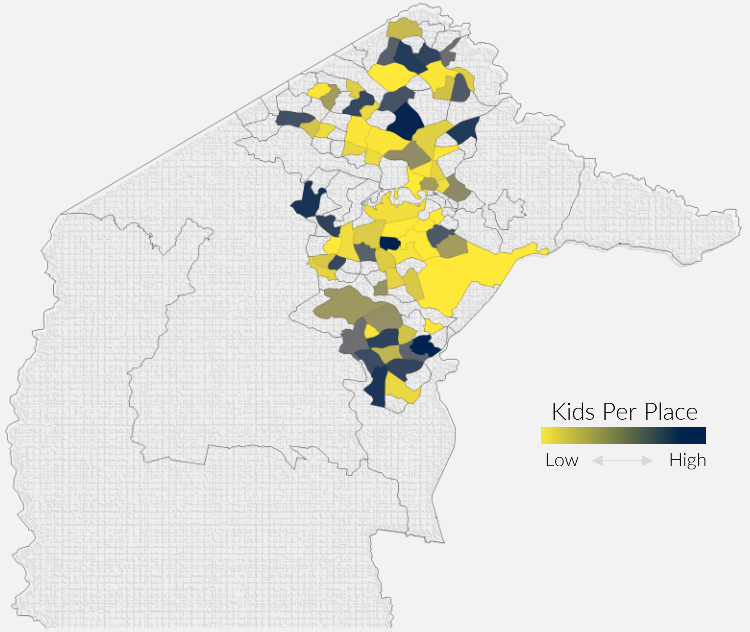
$152

Average Daily Fee

+15.0% 2yr gr

590m

Average School Proximity



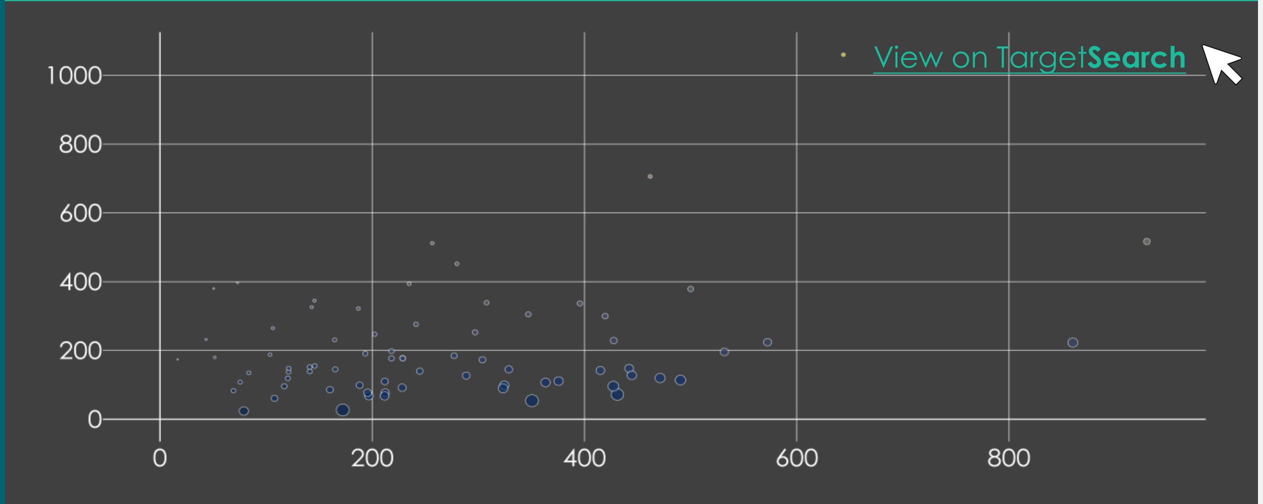
Demographic Drivers

	LDC Centres	LDC Places	Other Places	Kids Per Place	School Enrolments Per Place	Average Fee	Avg. LDC / School Proximity
Australian Capital Territory	184	15,726	15,061	1.8	4.9	152	590

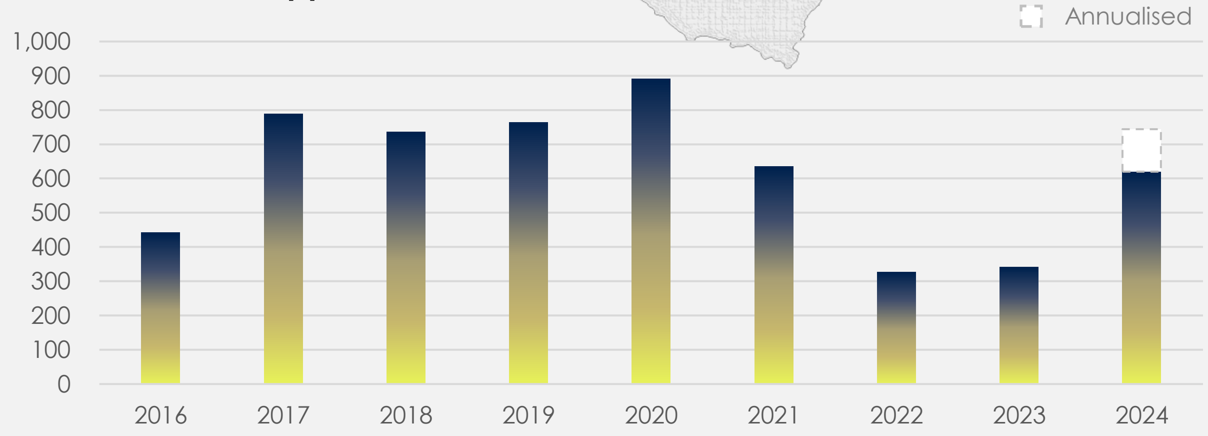
* Kids Per Place

Total Population	% Aged Under 5	Population Growth Since Census	Res. Dwellling Approvals Per 100	Unemp. Rate	Partic. Rate	Average Taxable Income
473,574	5.9	4.3	0.9	3.7	69.6	90,533

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



Net LDC Place Approvals 2016 - 2024 YTD



Sources: ABS / ACECQA / ACARA / 2016 Census / DOH / NSK / AreaSearch

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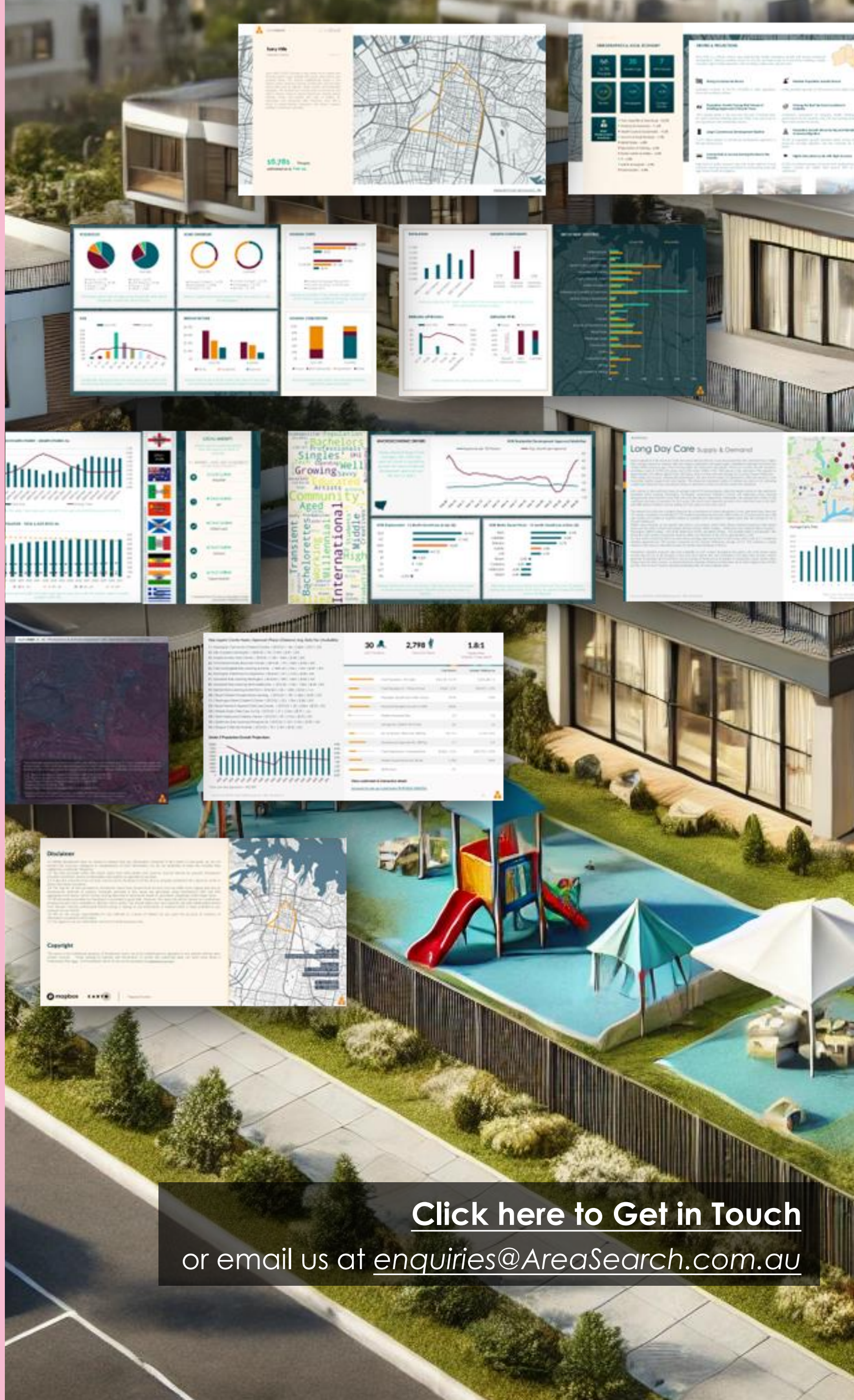
Data as at Oct-24:

Childcare:	Oct-24
Schools:	Jun-23
Population:	Aug-24
Development:	Aug-24
Employment:	Dec-23
Income:	2021 Census



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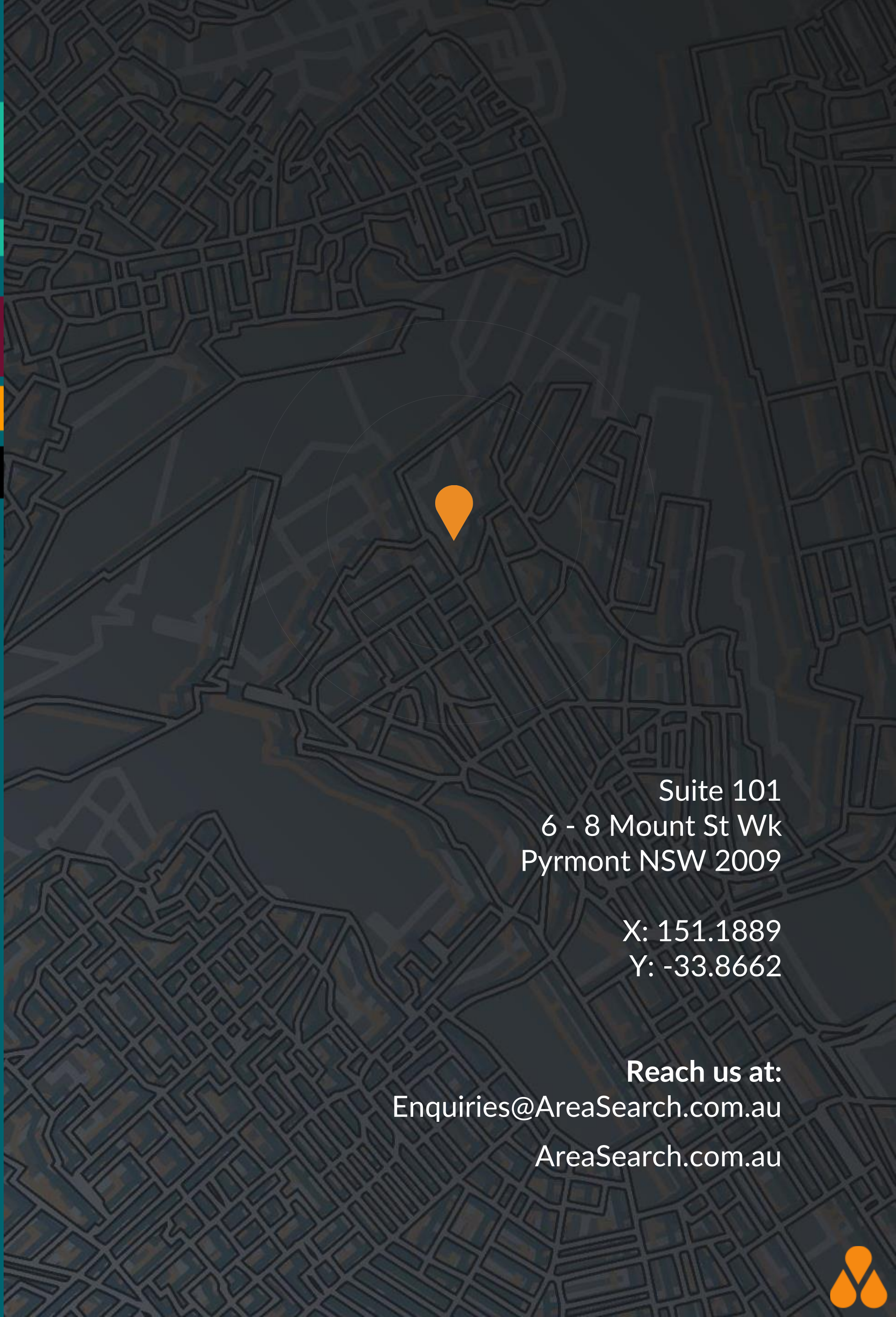

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