

# Market Snapshot

## Filters

State: Australian Capital T... (1) ▾

Region ▾

Select State or SA4 Region for Analysis.  
SA4's represent labour markets within each State and Territory.

## Centre Characteristics

Total Childcare Centres

165

Smallest Centre

20

Oldest Centre Built

1963

Total Population

447.0K

Total Childcare Places

13,544

Median Centre Size

82

Median Centre Age

2006

0-4 Population

29.8K

Ratio Children / Place

2.2

Largest Centre

178

Newest Centre Built

2021

Female LF Part. %

55.0

Source: Business Geographics LDC Development Database

## Quality

0 - Not Assessed / Unknown

2 - Working Towards NQS

3 - Meeting NQS

4 - Exceeding NQS

5 - Excellent

0 10 20 30 40 50 60

Source: ACEQA

## Daily Fees

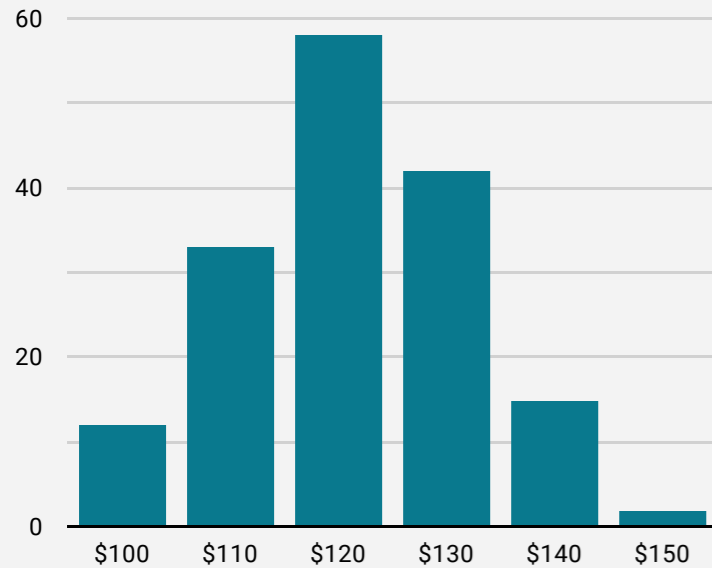
Min. Fee

\$100

\$125

Max Fee

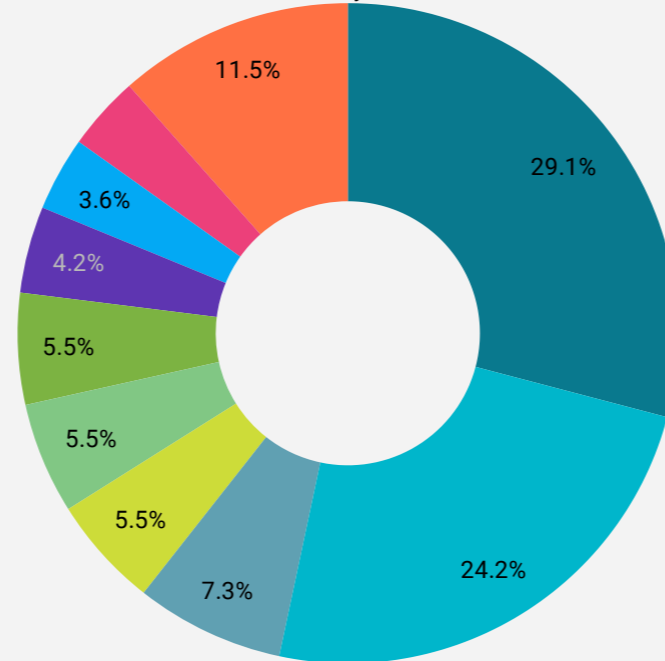
\$154



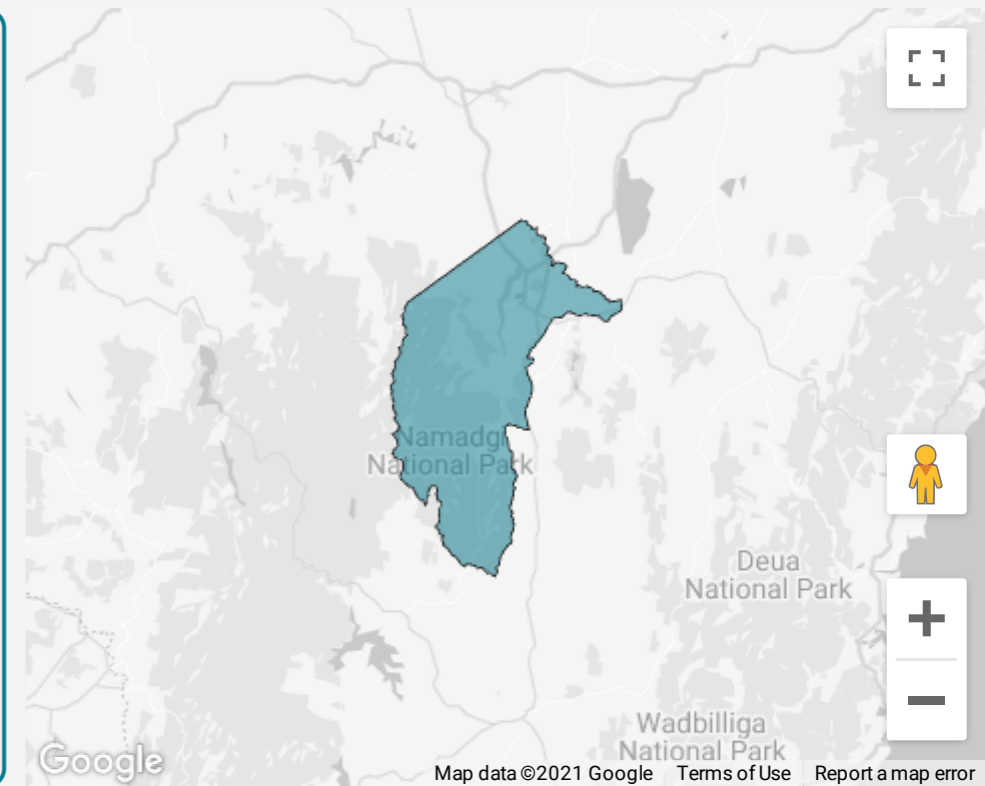
Source: Business Geographics Research

## Childcare Providers

● Small Private... 
 ● Community 
 ● Communiti... 
 ● Church 
 ● G8 
 ● YMCA 
 ● Goodstart 
 ● Busy Bees 
 ● Guardian 
 ● others



Source: ACEQA & Business Geographics



# Development Overview

## Filters

State: Australian Capital T... (1) ▾

Region ▾

Development Type ▾

Development Status ▾

Select State or SA4 Region for Analysis.  
Data can also be filtered by Development Type and/or Status

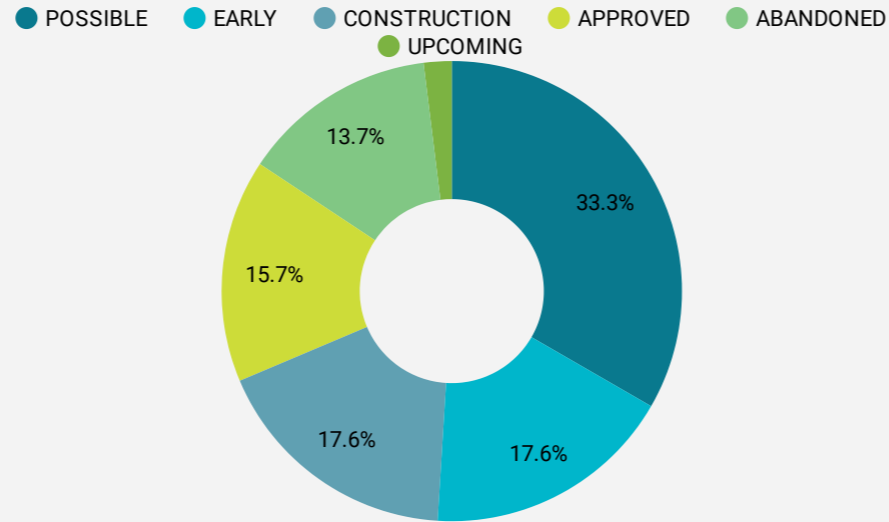
## Development Overview

Data on development activity is based on aggregated data from Business Geographic's Long Day Care Development Database

The source data is compiled from local government planning registers and includes data from construction project lead services provided by BCI Australia (Lead Manager) and RP Data (Cordell Connect).

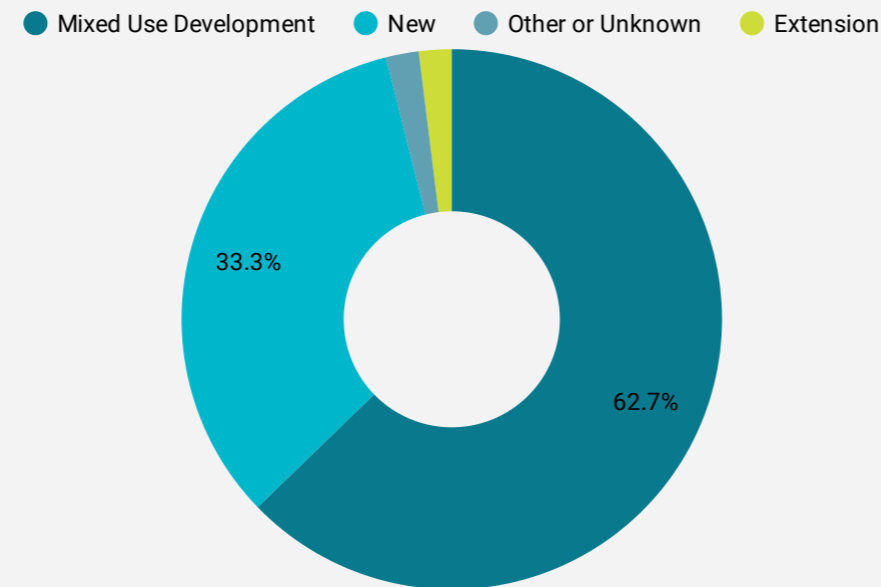
Further details on Development Types and Development Status are provided in the Data Glossary on Page 7.

## Development Status



Source: Business Geographics LDC Development Database

## Development Types

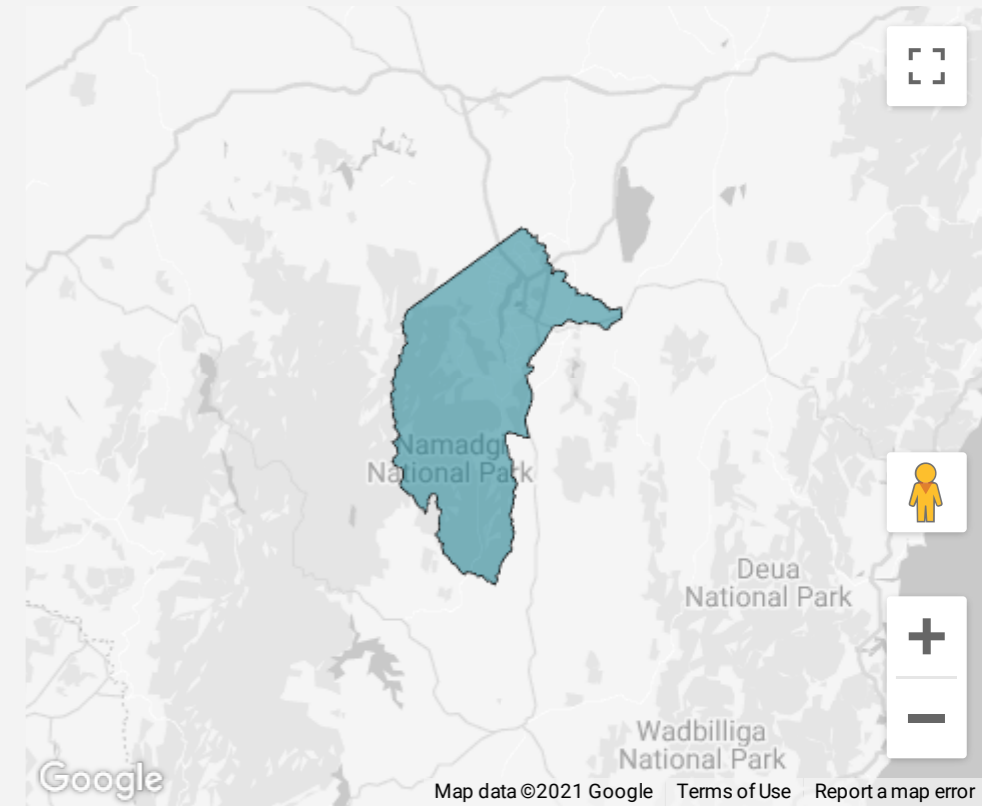


Source: Business Geographics LDC Development Database

## Development Stats

No. Existing Centres	No. Existing Places	Avg. Centre Size (Places)
<b>165.0</b>	<b>13.5K</b>	<b>82.1</b>
Proposed New Centres	No. Proposed Places	Avg. Dev Size (Places)
<b>42.0</b>	<b>3.3K</b>	<b>101.2</b>
Avg. Project Value		
<b>\$1.24M</b>		

Source: Business Geographics LDC Development Database



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**Forecast Assumptions**

Forecast Assumptions are Editable. Completion Rates (%) are estimated and represent the likelihood of development projects being completed within the forecast horizon.

A Completion %  ?

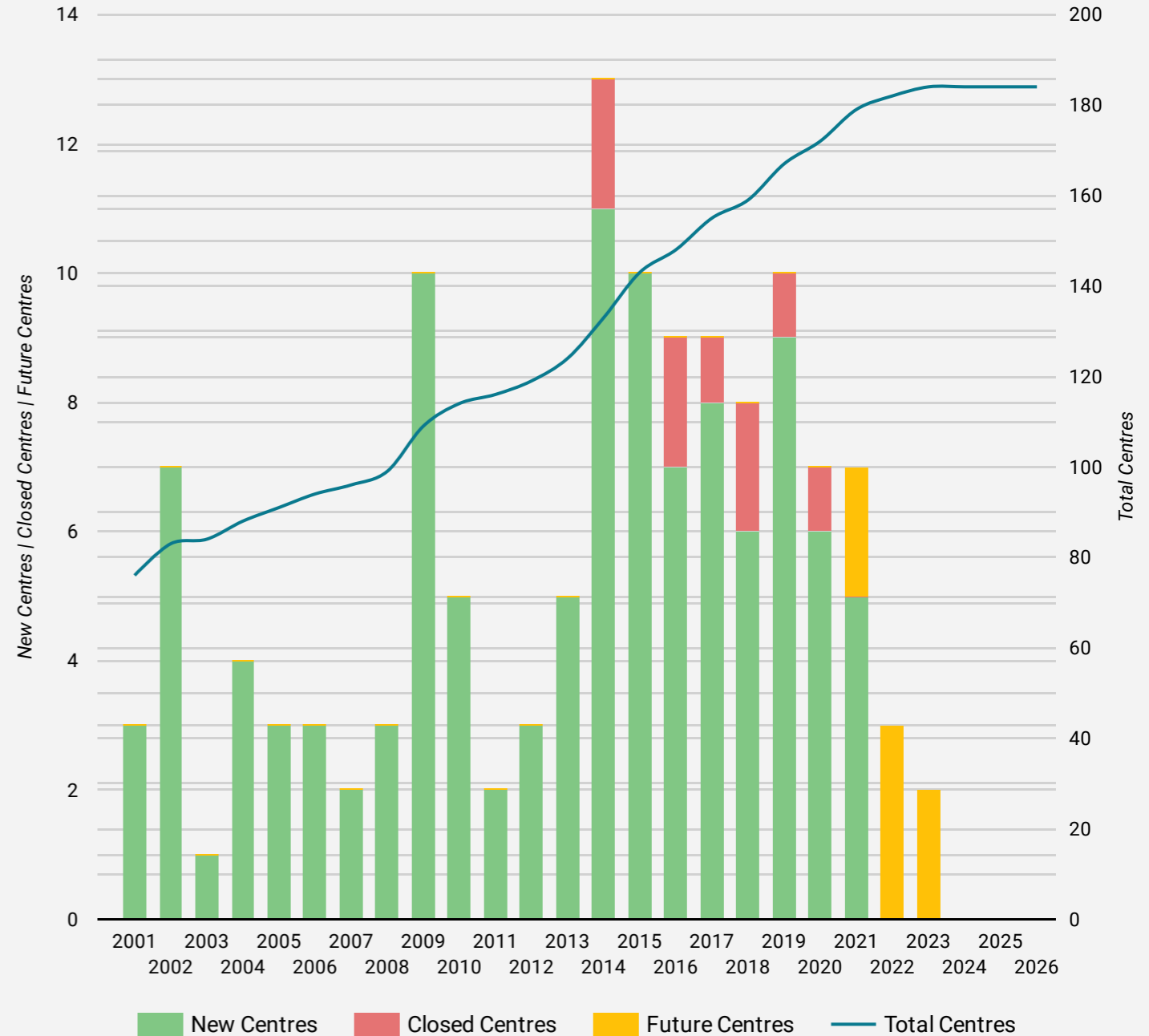
B Completion %  ?

C Completion %  ?

D Completion %  ?

More details on Forecast Assumptions and Completion Rates are provided in the Data Glossary on Page 7.

Year	New Centres	Closed Centres	Future Centres	Total Centres
2001	3	0	0	76
2002	7	0	0	83
2003	1	0	0	84
2004	4	0	0	88
2005	3	0	0	91
2006	3	0	0	94
2007	2	0	0	96
2008	3	0	0	99
2009	10	0	0	109
2010	5	0	0	114
2011	2	0	0	116
2012	3	0	0	119
2013	5	0	0	124
2014	11	2	0	133
2015	10	0	0	143
2016	7	2	0	148
2017	8	1	0	155
2018	6	2	0	159
2019	9	1	0	167
2020	6	1	0	172
2021	5	0	2	179
2022	0	0	3	182
2023	0	0	2	184
2024	0	0	0	184
2025	0	0	0	184
2026	0	0	0	184



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Forecast Assumptions are Editable.  
Completion Rates (%) are estimated and represent the likelihood of development projects being completed within the forecast horizon.

A Completion %  ?

B Completion %  ?

C Completion %  ?

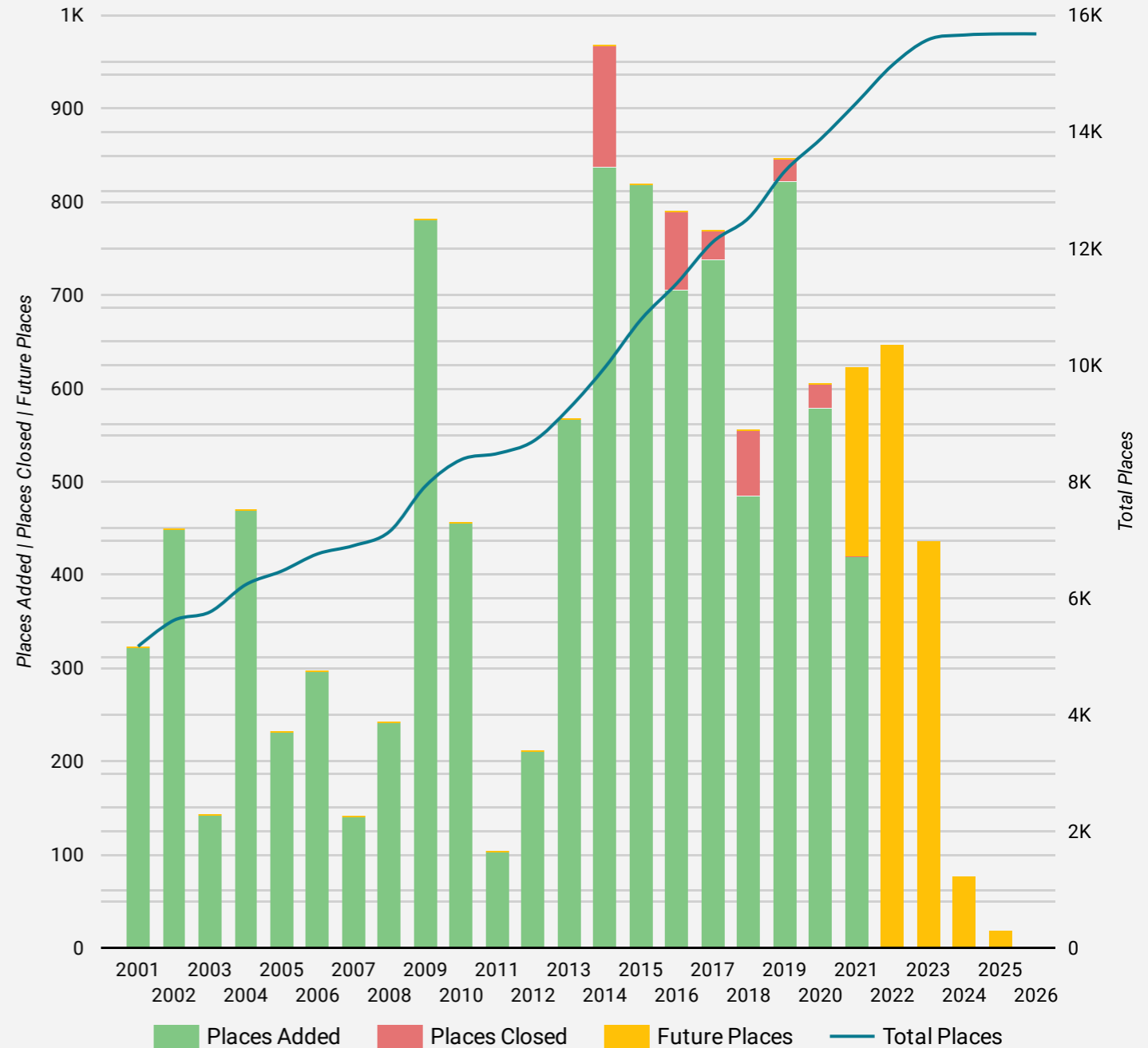
D Completion %  ?

Represents the number of places to use where the number of places is unknown.

Extension Places  ?

New Centre Places  ?

Year	Places Added	Places Closed	Future Places	Total Places
2001	322	0	0	5.2K
2002	449	0	0	5.6K
2003	142	0	0	5.8K
2004	470	0	0	6.2K
2005	232	0	0	6.5K
2006	296	0	0	6.8K
2007	141	0	0	6.9K
2008	242	0	0	7.1K
2009	780	0	0	7.9K
2010	455	0	0	8.4K
2011	103	0	0	8.5K
2012	211	0	0	8.7K
2013	566	0	0	9.3K
2014	837	131	0	10K
2015	819	0	0	10.8K
2016	706	84	0	11.4K
2017	738	30	0	12.1K
2018	484	70	0	12.5K
2019	822	24	0	13.3K
2020	579	25	0	13.9K
2021	419	0	204	14.5K
2022	0	0	647	15.1K
2023	0	0	436	15.6K
2024	0	0	77	15.7K
2025	0	0	19	15.7K
2026	0	0	0	15.7K



## Filters

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Region ▾

Development Type ▾

Development Status ▾

## Forecast Assumptions

Extension Places  ?

New Centre Places  ?

## Development Status

Developments are classified into the following broad categories based on their completion likelihood -

A = Abandoned (Default completion % is 5%)

B = Early and Possible Developments (20%)

C = Approved Developments (50%)

D = Under Construction (100%)

A more detailed explanation is provide in the Data Glossary on Page 7.

## No. of Centres by Project Status and Year

Dev Status	Year of Completion / No. of Centres						Grand total
	2021	2022	2023	2024	2025	2026 or later	
A	-	-	-	-	-	7	7
B	1	5	1	4	1	14	26
C	-	5	3	-	-	-	8
D	3	3	2	-	-	2	10
<b>Grand total</b>	<b>4</b>	<b>13</b>	<b>6</b>	<b>4</b>	<b>1</b>	<b>23</b>	<b>51</b>

Source: Business Geographics LDC Development Database

## No. of Places by Project Status and Year

Dev Status	Year of Completion / No. of Places						Grand total
	2021	2022	2023	2024	2025	2026 or later	
A	-	-	-	-	-	721	721
B	94	514	110	385	95	1,262	2,460
C	-	440	345	-	-	-	785
D	305	309	242	-	-	195	1,051
<b>Grand total</b>	<b>399</b>	<b>1,263</b>	<b>697</b>	<b>385</b>	<b>95</b>	<b>2,178</b>	<b>5,017</b>

Source: Business Geographics LDC Development Database

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### Date Range

21 Jun 2021 - 21 Jul ▾

(Max. 90 days)

### New Service Approvals and Development Projects

#### New Service Approvals

List of new centres that have received service approval from ACEQA in the last 30 days.

#### New Developments

List of new Long Day Care developments that have been added to Business Geographic's development database in the last 30 days.

#### Date Range

The Date Range to search for new Service Approvals and Developments can be extended to up to 90 days above.

Please note that there can be a delay in the reporting of new development applications and the list is indicative only and may not be conclusive.

### New Service Approvals

Date Added ▾	Name	Address	Age Range	Places	provider_name
1 Jul 2021	LillyPilly EEC	32 Mina Wylie Crescent, GORDON 2906 ACT	Nursery+	114	Lillypilly Eec Pty Ltd ATF Lillypilly Eec Unit Trust

Source: Business Geographics LDC Development Database

### New Developments

Date Added ▾	Name	Address	Dev Type	Dev Status	Places	Council	DA Number
12 Jul 2021	-	11 O'HANLON PLACE, NICHOLLS, 2913 Australian Capital Territory	Mixed Use Development	POSSIBLE	90	ACT	202138674

Source: Business Geographics LDC Development Database

Qikmaps Long Day Care Market Dashboard pulls together key statistics for the childcare industry, sourced from Business Geographics' proprietary childcare industry research. It's a useful tool for tracking the market, forecasting future development activity and monitoring new developments. This Data Glossary provides definitions of terms used in the report.

## Development Types

Business Geographics classifies developments into the following types:

- **New Centre (NEW):** New Centre. This refers to a new stand-alone childcare centre
- **Mixed Use Development (MUD):** Mixed Use Development. This includes applications/approvals for commercial or residential developments which include a childcare component.
- **Extension (EXT):** Development relating to an existing centre that will result in additional places being added.
- **Alteration (ALT):** This includes applications and/or approvals for refurbishment that will not result in an increase in the number of licensed places ( e.g. *New Kitchen, Playground etc.* ).
- **Other (OTHER):** This includes related developments such as kindergartens, preschools or childcare and family hubs where the final use is unclear, but which may include a long day care component.

## Development Status

Business Geographics tracks the progress of childcare developments by monitoring council development application updates, property development databases, and other information sources. Based on our research, we classify development progress into the following broad categories. These classifications are also used to define the default completion percentage used for forecasting (See Forecast Assumptions).

**A = Abandoned:** This category includes developments which have been approved but withdrawn or abandoned. It also includes sites which have been sold with a development approval but have not proceeded. Some of these sites may still be developed in the future. The default completion percentage is 5%.

**B = Early and Possible Developments: Early:** This refers to any proposed development at early planning or pre-lodgement stage. **Possible:** This refers to any application which has been lodged and are under assessment. It also includes refused applications that are under appeal. The default completion percentage is 20%.

**C = Approved:** These are developments that have received Development Approval and may proceed. The default completion percentage is 50%.

**D = Construction:** Construction has commenced and therefore these developments will likely open as a new centre, although an operator may not yet have been found. The default completion percentage is 100%.

## Forecast Assumptions

The Dashboard provides forecasts for new centres (and places) based on the current known development pipeline. This is indicative only and does not allow for future developments (that have not yet been proposed). However, users can modify the forecast assumptions by changing the completion percentages for projects based on their development status. The default assumptions are relatively conservative and a higher completion rate can be assumed to see its impact on future supply. Most developments have a known size however where the number of places is not known a default figure of 95 places for new centres and 25 places for extensions is applied. This can also be modified as required.

## Other Data - Market Snapshot Page

**Characteristics** - Key characteristics of the selected region including number, age and size of centres. The ratio is useful indicator of supply/demand and is the number of children under 5 per childcare place. The female labour force participation rate is closed tied to long day care participation rates (demand).

**Daily Fees** - The average daily fees (and minimum/maximum) is estimated based on Business Geographics research which includes surveying over 65% of long day care centres in Australia per annum.

**Childcare Provider** - Centres are classified into the main provider categories. Small independent providers with fewer than 10 centres are grouped together. The 'other' category includes 'mid-sized' portfolios of 10 - 25 centres (both private and community) where not otherwise specified.

**Quality** - Quality rating are based on the National Quality Standard.

### Disclaimer

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