



GapMaps

YOU'RE IN THE RIGHT PLACE

2022 Mid-Year Network Report

Childcare Insights



1st July 2021 – 30th June 2022
Australia

Insights Summary

Data recently compiled by GapMaps on the provision of childcare centres and Long Day Care (LDC) places within Australia shows at present there are some 8,555 centres providing an estimated 617,486 LDC places – an average of 72 places per centre. That in turn means that the provision of LDC places in Australia at present is equivalent to one place for every 3.2 children of childcare age. That is the overview, however, the picture varies enormously across all parts of the country, including within major metropolitan areas; between metropolitan areas and regional towns; and between states.

Our analysis on availability of childcare services shows that:

- Less than half of Greater Melbourne has a childcare provision of at least 1 place for every 3 children aged 0-5 while many areas, particularly around the urban fringe, have less than half that provision, i.e. only one place for every 6-7 children of childcare age and sometimes even less.
- The picture is similar for Sydney while the level of provision overall is somewhat higher in Brisbane – though still with many local areas under-supplied.
- Of our Tracked Brands, Busy Bees and Edge Early Learning have seen the largest increases in network size (33 and 31 respectively.)
- The two largest Tracked Brands (Goodstart Early Learning and G8 Childcare) have seen slight decreases in the size of their network, with only 4 openings and 13 closures between them.

GapMaps Live provides you with the ability to visualise and compare markets and identify these catchments with unmet demand for childcare services.

NETWORK OVERVIEW

30 June 2022

**617,486 LDC places
across Australia**

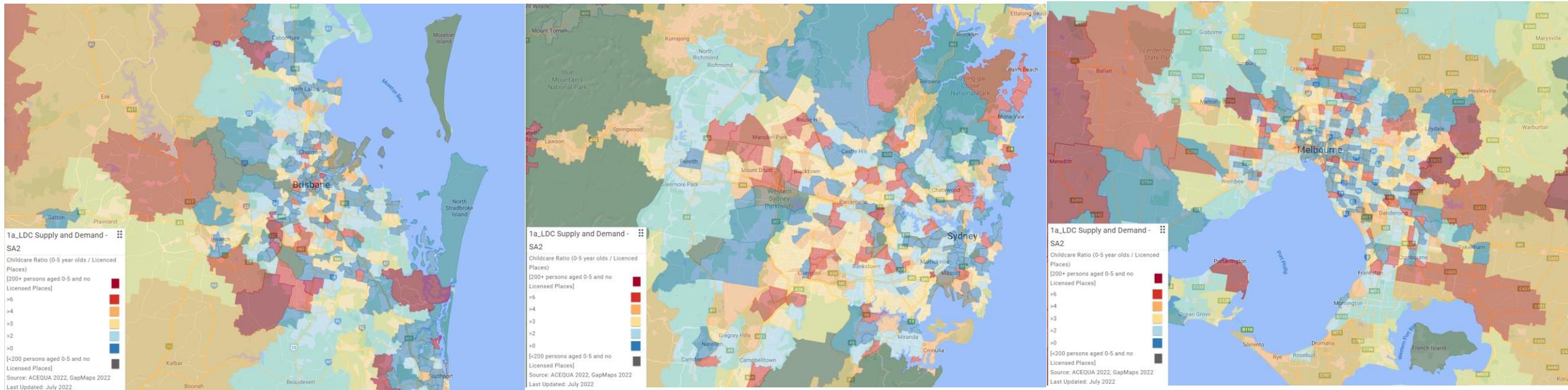
**Average of one place
for every 3.17 children
aged 0-5**

	Population 5 & Under (000's)	All Daycare Spaces	Long Daycare Spaces	Children per Daycare Place	Children per Long Daycare Place
Australia	1,957	1,086,679	617,486	1.80	3.17
Tier 1 > 1 Million	1,287	734,632	417,200	1.75	3.09
Greater Sydney	420	234,523	134,466	1.79	3.12
Greater Melbourne	398	240,091	130,272	1.66	3.06
Greater Brisbane	201	130,081	80,676	1.55	2.50
Greater Perth	170	67,158	41,781	2.54	4.08
Greater Adelaide	97	62,779	30,005	1.55	3.24
Tier 2 200,000-1 Mil.	157	101,929	61,075	1.54	2.58
Gold Coast	45	27,801	20,038	1.61	2.23
Australian Capital Territory	35	29,698	14,566	1.16	2.37
Newcastle	24	16,710	8,763	1.45	2.76
Wollongong	20	9,620	5,484	2.07	3.63
Sunshine Coast	17	10,439	6,998	1.62	2.41
Greater Hobart	17	7,661	5,226	2.23	3.27
Tier 3* 100-200,000	76	52,886	30,037	1.44	2.53
Townsville	14	10,058	6,379	1.44	2.27
Geelong	12	8,860	4,961	1.33	2.38
Cairns	12	6,982	4,282	1.77	2.88
Greater Darwin	13	10,414	4,664	1.28	2.87
Ballarat	8	5,514	3,445	1.50	2.39
Toowoomba	8	5,958	3,461	1.30	2.24
Tier 4 50-100,000	54	30,572	19,118	1.75	2.80
Tier 5 20-50,000	87	46,485	27,576	1.87	3.16
Tier 6 10-20,000	65	33,592	19,760	1.93	3.28

Ratio of no. 0 – 5 year olds to supply of LDC places, by SA2

Brisbane, Sydney and Melbourne

30 June 2022



TRACKED BRANDS SUMMARY

30 June 2022

18 Brands Tracked

2,890 Locations

132 Locations Opened*

30 Locations Closed*

	Total Stores	Last 12 Months		Net Change
		Openings	Closures	
Goodstart Early Learning	668	4	8	-4
G8 Childcare	477	-	5	-5
C&K Childcare/Kindy	338	17	-	+17
C&K Branch	179			
C&K Affiliate	159			
Great Beginnings	246	1	1	-
Great Beginnings - Branded	52			
Great Beginnings - Affiliate	194			
Affinity	153	-	-	-
Uniting Child Care	149	11	4	7
Guardian Early Learning	134	8	2	+6
KU	133	-	1	-1
Busy Bees Australia	111	35	2	+33
Only About Children	80	5	2	+3
Nido Early School	74	9	2	+7
ECMS	61	2	1	+1
Sparrow Early Learning	58	-	-	-
Montessori Academy	56	-	2	-2
Greenleaves Early Learning	46	5	-	+5
Edge Early Learning	46	31	-	+31
One Tree	33	4	-	+4
Big Fat Smile Group	27	-	-	-
Total (18 Brands)	2,890	132	30	+102

*Store count includes only LDC places where it has been possible to separate from other care

*12 months to 30 June 2022

110 CENTRE OPENINGS*

(Tracked Brands)

12 MONTHS TO 30 June 2022

Brand	Suburb	State
BUSY BEES AUSTRALIA	CAMPBELLTOWN (NSW)	NSW
BUSY BEES AUSTRALIA	GEORGES HALL	NSW
BUSY BEES AUSTRALIA	MAITLAND (NSW)	NSW
BUSY BEES AUSTRALIA	TAMINDA	NSW
BUSY BEES AUSTRALIA	TINGALPA	QLD
BUSY BEES AUSTRALIA	WOOLLOONGABBA	QLD
BUSY BEES AUSTRALIA	GILLES PLAINS	SA
BUSY BEES AUSTRALIA	KILBURN	SA
BUSY BEES AUSTRALIA	NOARLUNGA DOWNS	SA
BUSY BEES AUSTRALIA	SMITHFIELD PLAINS	SA
BUSY BEES AUSTRALIA	ALFREDTON	VIC
BUSY BEES AUSTRALIA	ALTONA MEADOWS	VIC
BUSY BEES AUSTRALIA	BENTLEIGH EAST	VIC
BUSY BEES AUSTRALIA	BRIAR HILL	VIC
BUSY BEES AUSTRALIA	CARRUN DOWNS	VIC
BUSY BEES AUSTRALIA	CASTLEMAINE	VIC
BUSY BEES AUSTRALIA	CRAIGIEBURN	VIC
BUSY BEES AUSTRALIA	CRANBOURNE	VIC
BUSY BEES AUSTRALIA	DANDENONG SOUTH	VIC
BUSY BEES AUSTRALIA	DONCASTER EAST	VIC
BUSY BEES AUSTRALIA	EPPING (VIC.)	VIC
BUSY BEES AUSTRALIA	GLENROY (VIC.)	VIC
BUSY BEES AUSTRALIA	LALOR	VIC
BUSY BEES AUSTRALIA	LARA	VIC
BUSY BEES AUSTRALIA	MACLEOD (VIC.)	VIC
BUSY BEES AUSTRALIA	NARRE WARREN	VIC
BUSY BEES AUSTRALIA	NARRE WARREN SOUTH	VIC
BUSY BEES AUSTRALIA	NEWCOMB	VIC
BUSY BEES AUSTRALIA	PORT MELBOURNE	VIC
BUSY BEES AUSTRALIA	PRESTON (VIC.)	VIC
BUSY BEES AUSTRALIA	ROWVILLE	VIC
BUSY BEES AUSTRALIA	SEAFORD (VIC.)	VIC
BUSY BEES AUSTRALIA	TEMPLESTOWE	VIC
BUSY BEES AUSTRALIA	BALDIVIS	WA
BUSY BEES AUSTRALIA	YANCHEP	WA

Brand	Suburb	State
C&K AFFILIATE KINDY	BURKETOWN	QLD
C&K AFFILIATE KINDY	COEN	QLD
C&K AFFILIATE KINDY	COOKTOWN	QLD
C&K AFFILIATE KINDY	DARLING HEIGHTS	QLD
C&K AFFILIATE KINDY	HAPPY VALLEY (QLD)	QLD
C&K AFFILIATE KINDY	HEALY	QLD
C&K AFFILIATE KINDY	HOPE VALE	QLD
C&K AFFILIATE KINDY	JULATTEN	QLD
C&K AFFILIATE KINDY	MENZIES (QLD)	QLD
C&K AFFILIATE KINDY	MISSION RIVER	QLD
C&K AFFILIATE KINDY	MISSION RIVER	QLD
C&K AFFILIATE KINDY	NORMANTON	QLD
C&K AFFILIATE KINDY	SILKSTONE	QLD
C&K AFFILIATE KINDY	SPRINGWOOD (QLD)	QLD
C&K AFFILIATE KINDY	TOWNVIEW	QLD
C&K BRANCH KINDY	CHARLEVILLE	QLD
C&K BRANCH KINDY	SUNSET	QLD
ECMS	FOOTSCRAY	VIC
ECMS	TRUGANINA	VIC
EDGE EARLY LEARNING	BEAUDESERT	QLD
EDGE EARLY LEARNING	COOMERA	QLD
EDGE EARLY LEARNING	EAGLEBY	QLD
EDGE EARLY LEARNING	ELANORA	QLD
EDGE EARLY LEARNING	FERNY GROVE	QLD
EDGE EARLY LEARNING	KELVIN GROVE	QLD
EDGE EARLY LEARNING	MARSDEN	QLD
EDGE EARLY LEARNING	WATERFORD WEST	QLD
GOODSTART EARLY LEARNING	MARSDEN PARK	NSW
GOODSTART EARLY LEARNING	BRINKIN	NT
GOODSTART EARLY LEARNING	BENTLEIGH EAST	VIC
GOODSTART EARLY LEARNING	PERTH (WA)	WA

Brand	Suburb	State
GREAT BEGINNINGS	VICTORIA PARK	WA
GREENLEAVES EARLY LEARNING	BELGIAN GARDENS	QLD
GREENLEAVES EARLY LEARNING	BERSERKER	QLD
GREENLEAVES EARLY LEARNING	BOWDEN	SA
GREENLEAVES EARLY LEARNING	WEST LAKES	SA
GREENLEAVES EARLY LEARNING	BALDIVIS	WA
GUARDIAN EARLY LEARNING	BEAUMONT HILLS	NSW
GUARDIAN EARLY LEARNING	ST IVES (NSW)	NSW
GUARDIAN EARLY LEARNING	AUGUSTINE HEIGHTS	QLD
GUARDIAN EARLY LEARNING	FIG TREE POCKET	QLD
GUARDIAN EARLY LEARNING	GREENBANK	QLD
GUARDIAN EARLY LEARNING	SPRINGFIELD CENTRAL	QLD
GUARDIAN EARLY LEARNING	GRANGE (SA)	SA
GUARDIAN EARLY LEARNING	PARADISE (SA)	SA
NIDO EARLY SCHOOL	PARADISE (SA)	SA
NIDO EARLY SCHOOL	PARADISE (SA)	SA
NIDO EARLY SCHOOL	REDWOOD PARK	SA
NIDO EARLY SCHOOL	FERNTREE GULLY	VIC
NIDO EARLY SCHOOL	ORMOND	VIC
NIDO EARLY SCHOOL	SEAFORD (VIC.)	VIC
NIDO EARLY SCHOOL	WOODEND (VIC.)	VIC
NIDO EARLY SCHOOL	BRABHAM	WA
NIDO EARLY SCHOOL	WILLETTON	WA
ONE TREE	APOLLO BAY (VIC.)	VIC
ONE TREE	OFFICER	VIC
ONE TREE	SEABROOK	VIC
ONE TREE	WERRIBEE	VIC
ONLY ABOUT CHILDREN	NORTH SYDNEY	NSW
ONLY ABOUT CHILDREN	SYDNEY	NSW
ONLY ABOUT CHILDREN	BRIDGEMAN DOWNS	QLD
ONLY ABOUT CHILDREN	BUDERIM	QLD
ONLY ABOUT CHILDREN	MORNINGSIDE	QLD
UNITING CHILD CARE	CAMPBELLTOWN (NSW)	NSW
UNITING CHILD CARE	GHAN	NT
UNITING CHILD CARE	MOUNT STUART (QLD)	QLD
UNITING CHILD CARE	COLLINSVALE	TAS
UNITING CHILD CARE	HOBART	TAS
UNITING CHILD CARE	KEMPTON	TAS
UNITING CHILD CARE	LAUNCESTON	TAS
UNITING CHILD CARE	NORTH HOBART	TAS
UNITING CHILD CARE	STEPPES	TAS
UNITING CHILD CARE	MELBOURNE	VIC
UNITING CHILD CARE	MELVILLE (WA)	WA

*Confirmed locations only, numbers may differ from overview slide

30 CENTRE CLOSURES*

(Tracked Brands)

12 MONTHS TO 30 June 2022

Brand	Suburb	State
BUSY BEES AUSTRALIA	MAROOCHYDORE	QLD
BUSY BEES AUSTRALIA	MAROOCHYDORE	QLD
ECMS	BOX HILL (VIC.)	VIC
G8 CHILDCARE	ABERGLASSLYN	NSW
G8 CHILDCARE	CHATSWOOD	NSW
G8 CHILDCARE	SALISBURY NORTH	SA
G8 CHILDCARE	THEBARTON	SA
G8 CHILDCARE	LILYDALE (VIC.)	VIC
GOODSTART EARLY LEARNING	BROOKVALE	NSW
GOODSTART EARLY LEARNING	HINCHINBROOK (NSW)	NSW
GOODSTART EARLY LEARNING	ASHMORE	QLD
GOODSTART EARLY LEARNING	BONGAREE	QLD
GOODSTART EARLY LEARNING	CLOVELLY PARK	SA
GOODSTART EARLY LEARNING	OAKBANK	SA
GOODSTART EARLY LEARNING	CARNEGIE	VIC
GOODSTART EARLY LEARNING	OAKLEIGH EAST	VIC
GREAT BEGINNINGS	DUFFYS FOREST	NSW
GUARDIAN EARLY LEARNING	SYDNEY	NSW
GUARDIAN EARLY LEARNING	SYDNEY	NSW
KU	DOCKLANDS	VIC
MONTESSORI ACADEMY	CLOVELLY	NSW
MONTESSORI ACADEMY	SYDNEY	NSW
NIDO EARLY SCHOOL	OAKLEIGH EAST	VIC
NIDO EARLY SCHOOL	SOUTH MELBOURNE	VIC
ONLY ABOUT CHILDREN	NORTH SYDNEY	NSW
ONLY ABOUT CHILDREN	SYDNEY	NSW
UNITING CHILD CARE	CHERMSIDE	QLD
UNITING CHILD CARE	LAUNCESTON	TAS
UNITING CHILD CARE	EAST BAIRNSDALE	VIC
UNITING CHILD CARE	RICHMOND (VIC.)	VIC

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For further information

Please Contact

Scott Johnson

Senior Analyst

scott@gapmaps.com

GapMaps Head Office
Suite 1, Level 1, 425 Docklands Drive
Docklands, 3008, Australia

+ 61 3 9670 4569 | info@gapmaps.com | www.gapmaps.com