

APPENDIX J

Child Care Impact Assessment

Prepared by:

Econisis

CHILD CARE IMPACT ASSESSMENT

153 Beenleigh-Redland Bay Road,
Cornubia

Client: Development Holdings

Title: CHILD CARE IMPACT ASSESSMENT

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Development Holdings c/- Property Projects Australia

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CONTENTS

EXECUTIVE SUMMARY	1
1 INTRODUCTION	5
1.1 Background and Context	5
1.2 Proposed Development.....	5
1.3 Report Structure	6
1.4 Glossary and Abbreviations	6
2 CATCHMENT DEFINITION AND PROFILE	7
2.1 Catchment Definition	7
2.2 Population and Demographics.....	8
2.2.1 Historical and Projected Population	8
2.2.2 Age Profile and Projections of Children.....	9
2.3 Socio-Economic Profile.....	10
2.3.1 Socio-Economic Drivers of Child Care Demand	10
2.3.2 Census Profile	11
2.3.3 Unemployment Rate	12
3 CENTRE-BASED CHILD CARE DEMAND	14
3.1 Children in Care	14
3.2 Centre-Based Long-Day Care	15
4 CHILD CARE SUPPLY AND GAP	17
4.1 Child Care Supply	17
4.1.1 Current Child Care Centres	17
4.1.2 Average Centre Size	17
4.2 Supply Gap	19
4.2.1 Impact of Proposed Centre.....	20
4.3 Implications for Subject Site	21
5 DEVELOPMENT IMPACT	22
5.1 Overall Impact Statement	22
5.1.1 Network Distribution	22
5.1.2 Travel Patterns.....	23

FIGURES AND TABLES

Figure 1 Number of Children in Care, Total and Long-Day Centre Based, Catchment Area, 2020 to 2041	2
Figure 2 Supply Gap/Need for Child Care Centre Places, Catchment Area, 2020 to 2041.....	3
Figure 3 Supply Gap/Need for Child Care Centre Places, including Proposed Development, Catchment Area, 2020 to 2041.....	3
Figure 4 153 Beenleigh Redland Bay Road, Cornubia	5
Figure 5 Catchment Area Primary School Catchment Map, 2023	7

Figure 6	Local Statistical Areas (SA2s), 2021.....	8
Figure 7	Historical and Projected Population, Catchment Area, 2001 to 2041.....	9
Figure 8	Historical and Projected Population aged 0-5 and 6-17, Catchment Area, 2020 to 2041	10
Figure 9	Unemployment Rate, Cornubia - Carbrook and Loganholme Tanah Merah South SA2s (ASGS 2016), 2010 to 2022.....	13
Figure 10	Share of Children in Child Care, Loganlea - Carbrook SA3.....	14
Figure 11	Number of Children in Care, Catchment Area, 2020 to 2041.....	15
Figure 12	Number of Children in Care, Total and Long-Day Centre Based, Catchment Area, 2020 to 2041	16
Figure 13	Average Approved Places for Child Care Suppliers, by Supplier Type, Queensland, as at December 2022.....	18
Figure 14	Share of Long-Day Care Centre Suppliers, Places above and below 110, Queensland, January 2019 to December 2022.....	18
Figure 15	Demand and Supply of Current and Approved Child Care Centre Places, Catchment Area, 2020 to 2041.....	19
Figure 16	Supply Gap/Need for Child Care Centre Places, Catchment Area, 2020 to 2041.....	20
Figure 17	Supply Gap/Need for Child Care Centre Places, Catchment Area, 2020 to 2041.....	20
Figure 18	Local Child Care Centre Service Ratios, Main Scenario and Additional Supply, Catchment Area, 2020 to 2041.....	21
Figure 19	Distribution of Existing (Blue), Approved (Green) and the Subject Site (Orange).....	22
Figure 20	Subject Site and Traffic Census Collection Point, 2021.....	23
Table 1	Glossary and Abbreviations.....	6
Table 2	Census Profile, Catchment Area SA2s, Logan LGA and Queensland, 2021.....	11
Table 3	Current Child Care Centres (Long-Day Care) Park Ridge Catchment Area.....	17

EXECUTIVE SUMMARY

Introduction

- Econisis has been engaged by Development Holdings to undertake a comprehensive impact-based assessment of centre-based child care capacity in the catchment of the proposed centre development 153 Beenleigh Redland Bay Road, Cornubia.

Catchment Definition And Profile

- A key driver of child care catchments are school catchments. This reflects the similar demographics of the area and the fact that school and child care drop offs are common linked trips for working families within an area. For the purposes of this assessment, Econisis has defined the catchment as the statistical areas of Cornubia – Carbrook and Loganholme - Tanah Merah.
- Data from the ABS indicates that the catchment area defined in section 2.1 indicates the residential population of the area in 2021 was approximately 20,941 people. This is up from 18,429 in 2006, representing growth of 2,519 people or 13.6% over the 15 years at a rate of 0.9% per annum.
- This growth is expected to continue. Estimated by Econisis using growth rates in the medium series population projections from the QGSO (2018), indicate the population will grow at accelerated rates until 2041. This will result in the population of the catchment reaching 24,731 people by 2026, 28,316 by 2031 and 39,647 by 2041¹.
- Based on data from QGSO and ABS, Econisis estimates that in 2022 there were approximately 5,430 children living in the catchment area, comprised of 1,663 children aged 0-5 and 3,766 aged 6-17. This cohort is expected to grow to 6,156 by 2026, 6,839 by 2031 and 9,130 by 2041.
- Historically, women have played the primary role of care givers for children. However, a convergence of socio-economic drivers has resulted in rapid growth in demand for child care demand. These drivers include:
 - Increased female tertiary education participation and qualifications
 - Generational and behavioural change
 - Cost of living
- Key findings from the 2021 Census of Population and Housing for the SA2s within the defined catchment include:
 - Larger shares of population aged 0-14 and younger median ages in Loganholme - Tanah Merah SA2
 - Cornubia - Carbrook has an above average share of population aged 65+
 - Above average household sizes, reflecting larger shares of Couple Family with Children Households, in both SA2s.
 - Above average shares of primary school attendance in both SA2s
 - Above average incomes in both SA2s, with Cornubia - Carbrook having a considerably larger average income.
 - Above average share of households owned outright in Cornubia - Carbrook and above average share of houses owned with a mortgage in Loganholme - Tanah Merah.

¹ Derived by Econisis applying QGSO medium series population projection growth rates to ABS ERP 2021..

- Overall, this combination of socio-economic attributes in the catchment is highly favourable for child care demand with above average shares of younger aged people, higher primary school participation rates and higher household incomes reflecting above average female workforce participation (particularly in Cornubia - Carbrook SA2)

Centre-Based Child Care Demand

- Data from the Australian Government Department of Education publishes quarterly estimates of child care demand, by type and region across Australia. Estimates for the Loganlea – Carbrook SA3 (within which the catchment SA2s are located) is that 64.8% of children aged 0-5 and 15.8% of children aged 6-17 attended some form of care in the year to June 2021.
- Applying these rates to the catchment child population projections, Econisis estimates that the number of children participating in formal care is expected to increase from 1,673 in 2022 to 1,876 in 2026, 2,087 in 2031 and 2,788 in 2041.
- In 2021, Centre-based care accounted for approximately 57.8% of all children in care in Queensland . Applying this rate and Econisis estimates the demand for centre-based care in the catchment will increase from 967 in 2022 to 1,084 in 2026, 1,206 in 2031 and 1,612 in 2041.

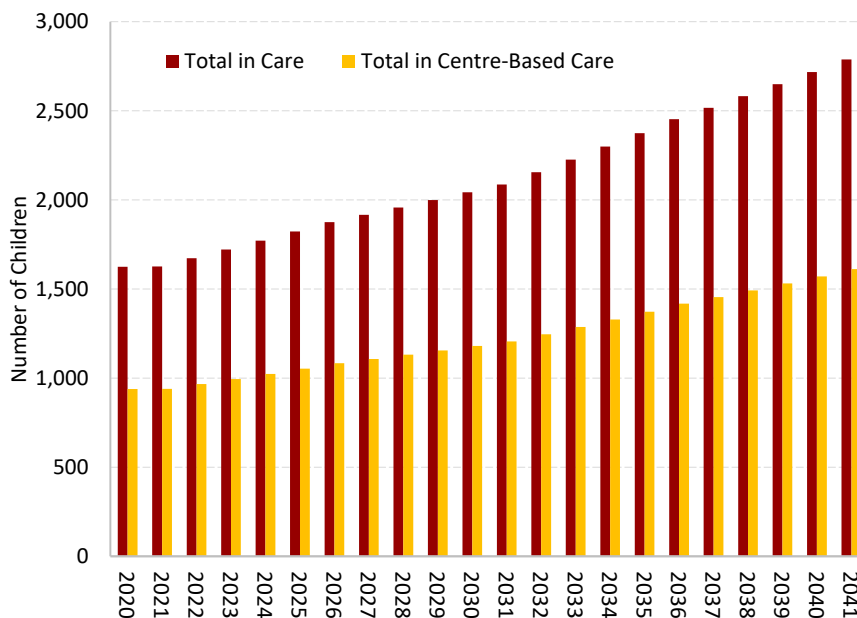


Figure 1 Number of Children in Care, Total and Long-Day Centre Based, Catchment Area, 2020 to 2041

Child Care Supply And Gap

- Econisis reviewed child care centre registration data from the Queensland Department of Education for December 2022 and approvals data from Logan City Council. Excluding centres that do not provide long-day care (such as those providing family, occasional or before and after school care), Econisis identified a total of 10 current child care centres and 1 approved centre (with a total of 911 places) to operating within the defined catchment by .
- Comparing child care places demand with current and approved supply, Econisis confirms that the need for child care places exceeds supply with a gap of 11 places in 2023/24.
- However, growing demand will further exacerbate this supply gap, reaching 173 places by 2026, 295 by 2031 and 701 by 2041.

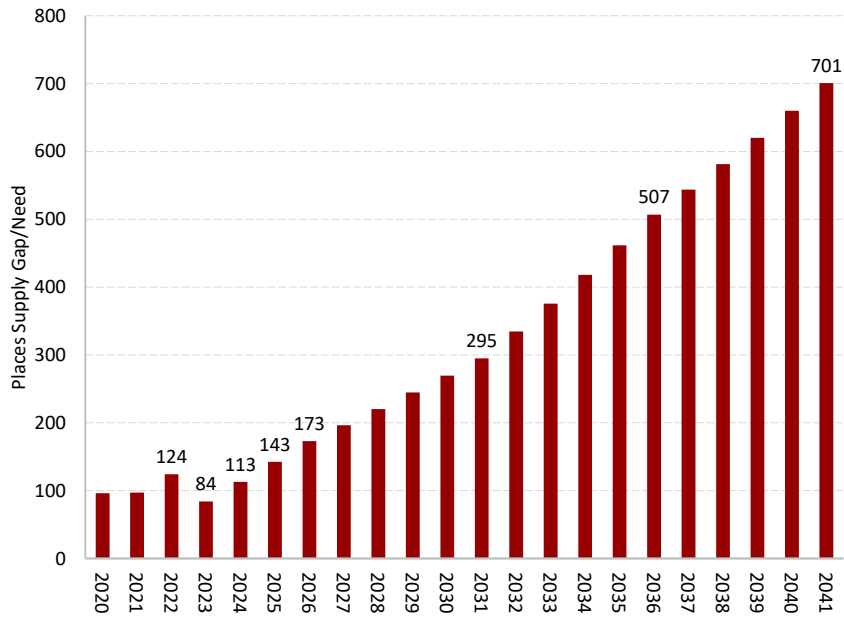


Figure 2 Supply Gap/Need for Child Care Centre Places, Catchment Area, 2020 to 2041

Development Impact

- Based on the analysis within this report, Econisis is of the opinion that the proposed development at 153 Beenleigh Redland Bay Road, Cornubia should have a total of 112 places. At this size, the undersupply based on current and approved supply as at 2023/24 is fully met, without resulting in an oversupply or impacting the sustainability of the current network.

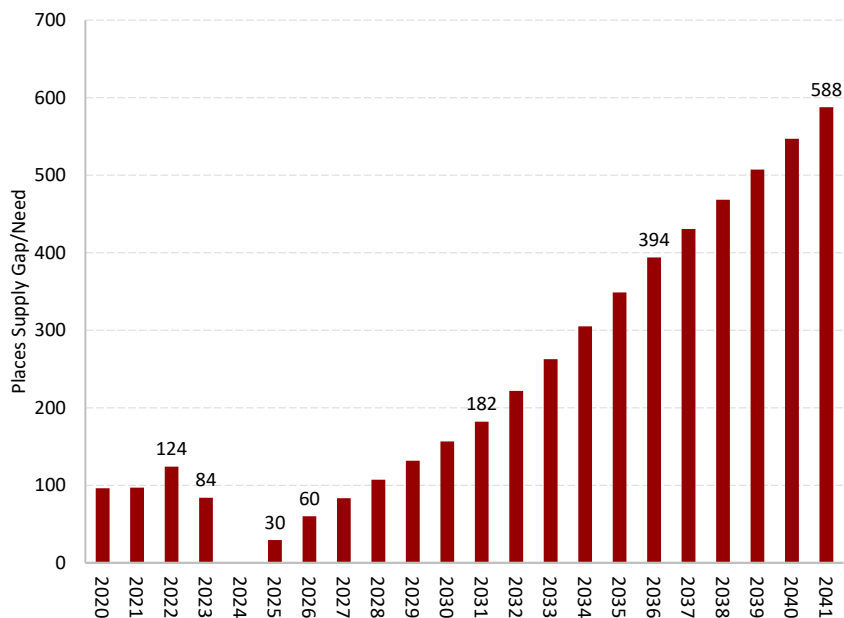


Figure 3 Supply Gap/Need for Child Care Centre Places, including Proposed Development, Catchment Area, 2020 to 2041

- The proposed location of the centre is located on a busy intra-regional arterial road, connecting the Cleveland - Stradbroke SA3 and the eastern part of the Loganlea - Carbrook SA3 to the Pacific Highway. This representing an ideal position for passing parents on the way to their work, with traffic ranging from 18,500 and 44,500 vehicles per day.

- It is also in located comparatively close to several primary and secondary schools in the catchment, including major private schools in the region on the same road further to the east. School proximity represents a significant locational advantage for the subject site, allowing it to act as a trip linking intervention for child care demand travelling to and from the schools.
- Carbrook State Primary School lacks a collocated long-day child care offering, while already having an enrolment management plan, limiting student demand to students within the local catchment.

1 INTRODUCTION

This section provides an outline of the report, background and context, structure and glossary and abbreviations.

1.1 Background and Context

Econisis was previously engaged by Development Holdings and Property Projects Australia to undertake a preliminary assessment of child care centre need for a potential child care centre at 153 Beenleigh – Redland Bay Road, Cornubia. This analysis identified an emerging gap in the number of child care centres servicing the local area based on currently registered centre supply and age-specific demand and child care utilisation across the Cornubia - Carbrook and Loganholme - Tanah Merah SA2s

Econisis has been subsequently engaged to undertake a more comprehensive impact-based assessment of centre-based child care capacity in the catchment of the proposed centre development. This builds upon the preliminary analysis, with a focus on the number of long-day care child care places required to meet catchment demand, as well as existing, approved and proposed supply in the catchment.

1.2 Proposed Development

Development Holdings seeks to develop a child care centre at 153 Beenleigh – Redland Bay Road, Cornubia.

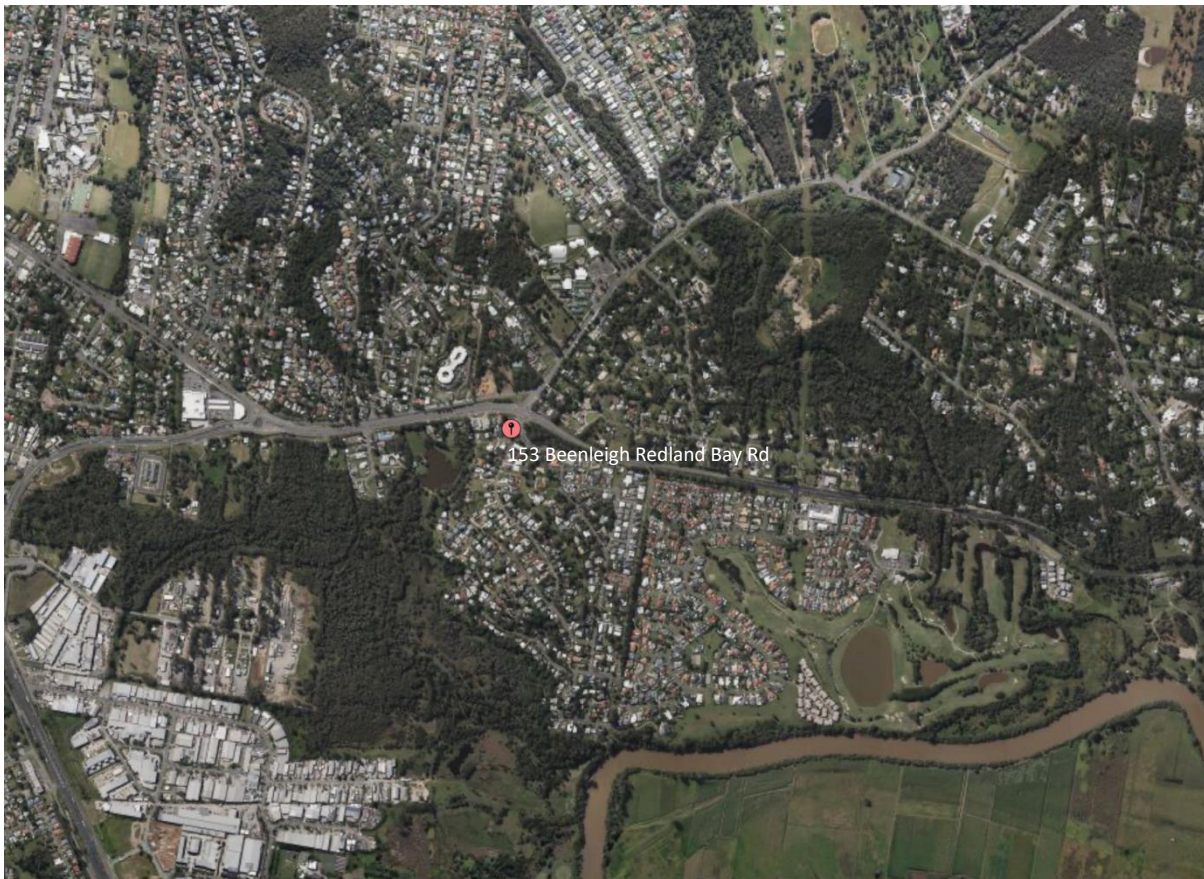


Figure 4 153 Beenleigh Redland Bay Road, Cornubia

1.3 Report Structure

This report is comprised by the following key sections:

- **INTRODUCTION** - This section provides an outline of the report, background and context, structure and glossary and abbreviations.
- **CATCHMENT DEFINITION AND PROFILE** - This section provides a definition of the assessment catchment and its socio-economic, population and demographic profile.
- **CENTRE-BASED CHILD CARE DEMAND** - This section provides an assessment of the demand for centre-based child care places within the catchment.
- **CHILD CARE SUPPLY AND GAP** - This section profiles current, approved and potential centre-based child care capacity supply and the scale and timing of any gap.
- **DEVELOPMENT IMPACT** - This section identifies any potential impacts from the proposed child care development and socio-economic justification.

1.4 Glossary and Abbreviations

The report includes the following terms and abbreviations throughout.

Table 1 Glossary and Abbreviations

Term/Abbreviation	Definition/Description
ABS	Australian Bureau of Statistics
AIHW	Australian Institute of Health and Welfare
ASGS	Australian Statistical Geographical Standard
QGSO	Queensland Government Statisticians Office
SA2	Statistical Area 2

2 CATCHMENT DEFINITION AND PROFILE

This section provides a definition of the assessment catchment and its socio-economic, population and demographic profile.

2.1 Catchment Definition

The subject site is located at 153 Beenleigh – Redland Bay Road, Cornubia. The site is located just within the Cornubia - Carbrook SA2, closely bordering the Loganholme - Tanah Merah SA2. Due to the subject site's close proximity to the neighbouring SA2, both Cornubia – Carbrook and Loganholme - Tanah Merah will be included in the catchment area.

The subject site is approximately 500m south of Chisolm Catholic College (secondary). The site is also approximately 5km west of Carbrook State School (primary), Calvary Christian College (primary) and Kimberley College (prep to year 12).

A key driver of child care catchments are school catchments. This reflects the similar demographics of the area and the fact that school and child care drop offs are common linked trips for working families within an area. A review of 2023 school catchments identifies a number of schools within the local catchment area of the proposed development including:

- Carbrook State School.
- Calvary Christian College
- Chisolm Catholic College
- Kimberley College
- Shailer Park State Highschool

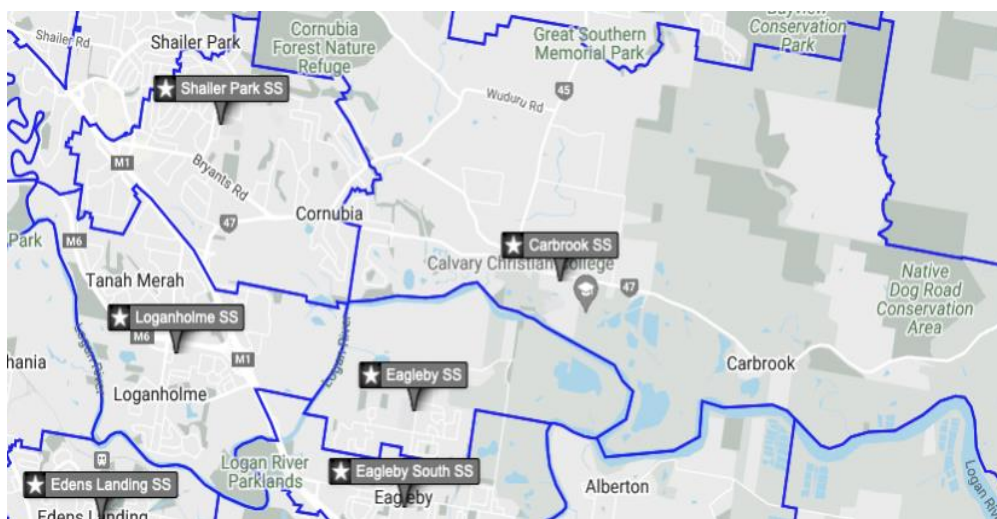


Figure 5 Catchment Area Primary School Catchment Map, 2023²

A review of statistical areas within the wider location confirms that the area covered by these schools are broadly in line with both Cornubia - Carbrook SA2 and Loganholme - Tanah Merah SA2 combined (based on ASGS 2021 statistical geographies).

Cornubia - Carbrook statistical area covers the suburbs of Cornubia and Carbrook within the Loganlea - Carbrook region. It extends east to Venman Bushland National Park and the Cornubia Park Sports Complex. To the south it extends to the Logan River and Beenleigh Redland Bay Rd and

² QGSO (2023) EDmap, Primary School Catchments 2023, accessed at <https://www.qgso.qld.gov.au/maps/edmap/>

the north to Venman Bushland National Park. To the west, is Carbrook Wetlands Conservation Park 2.

Loganholme - Tanah Merah statistical area covers the suburbs of Loganholme and Tanah Merah and is within the Loganlea - Carbrook SA3. To the south, it extends to the Logan River. The Logan River wraps around to the east bordering between Loganholme and Cornubia. The northern aspect of the SA2 extends along Bryants Road and the Pacific Highway, to the Logan Hyperdome Shopping Complex. To the west is the Logan River, Griffith University Logan, and Murray’s Environmental Nature Refuge.

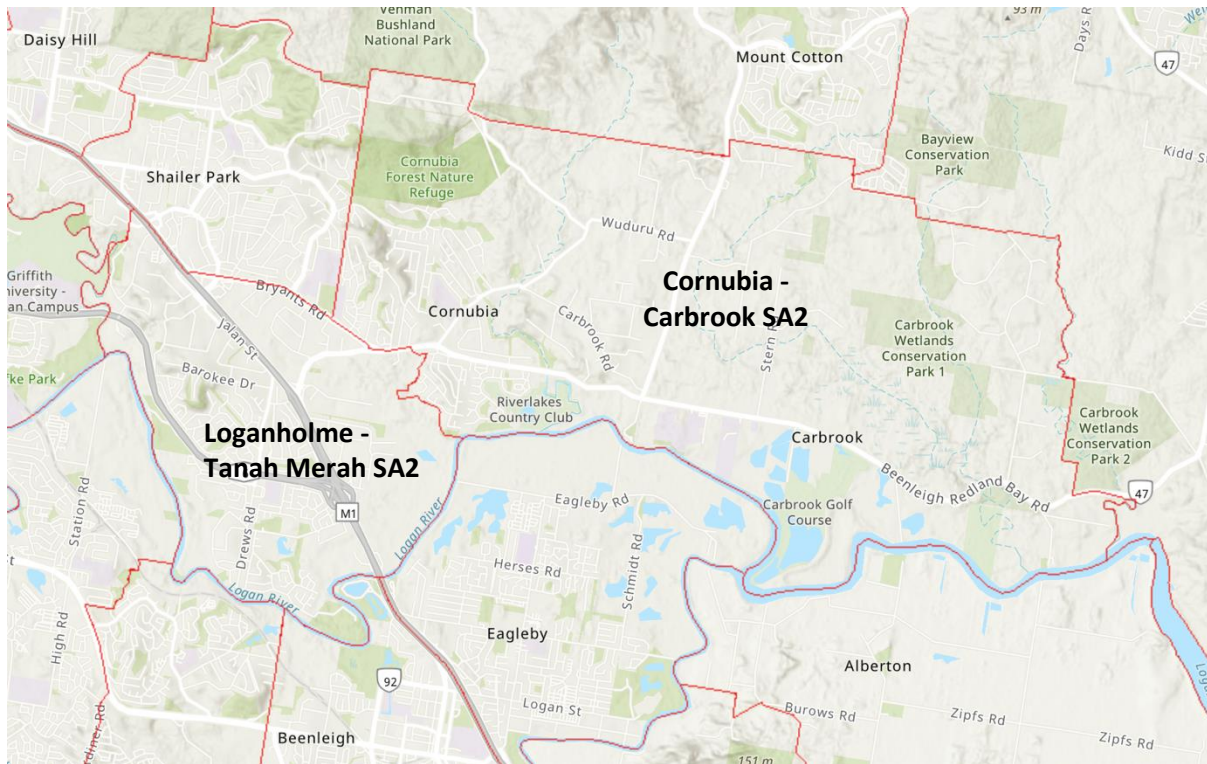


Figure 6 Local Statistical Areas (SA2s), 2021³

For the purposes of this assessment, Econisis has defined the catchment as the statistical areas of Cornubia - Carbrook SA2 and Loganholme - Tanah Merah SA2. The report will refer to this as the catchment area.

2.2 Population and Demographics

2.2.1 Historical and Projected Population

The population of the catchment area has remained fairly minor between 2001 and 2021, only increasing 3,813 people in the 20 years. This represents a growth rate of 13.6% since 2006, and annual population increases of 0.8%.⁴

³ ABS (2021) ABS Maps accessed at <https://maps.abs.gov.au/>

⁴ ABS (2022) Estimated Residential Population, ABS, Canberra

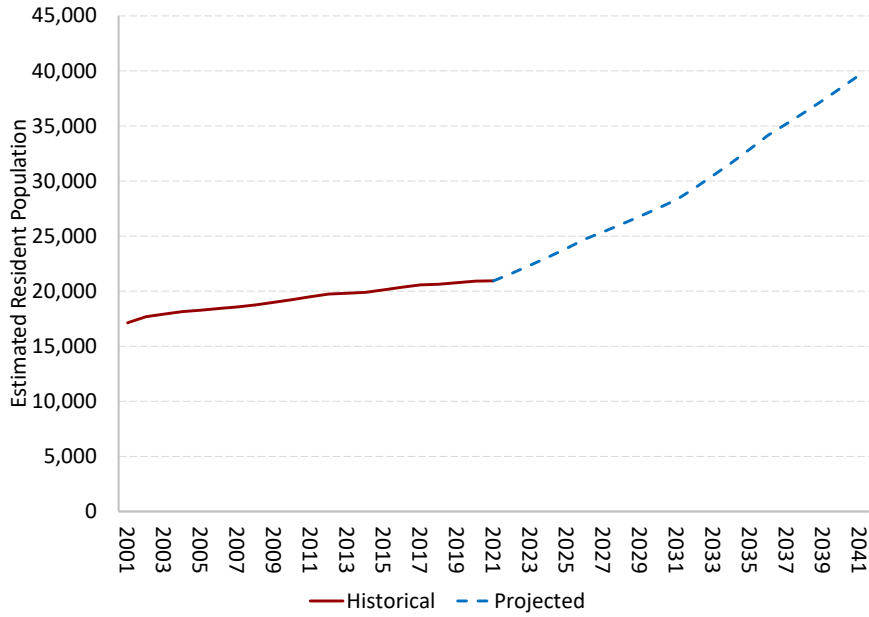


Figure 7 Historical and Projected Population, Catchment Area, 2001 to 2041

The emergence of several new residential estates and growth areas in the catchment is expected to see growth accelerate. Estimates by Econisis using growth rates in the medium series population projections from the QGSO (2018) for the catchment SA2s, indicate the population will reach 24,731 people by 2026, 28,316 by 2031 and 39,647 by 2041⁵.

2.2.2 Age Profile and Projections of Children

Econisis has utilised data from the ABS Census 2021, catalogues related to population by age and gender and QGSO age specific population projection to develop projections of the core age cohorts related to child care – namely 0-5 and 6 to 17. These two age groups have been estimated separately reflecting the different rates of participation among these age groups in long-day centre-based child care, as reported for the wider Loganlea - Carbrook SA3 by the Queensland Department of Education.

Based on this analysis, Econisis estimates that in 2022 there were approximately 5,430 children living in the catchment area, comprised of 1,663 children aged 0-5 and 3,766 aged 6-17. This cohort is expected to grow to 6,156 by 2026, 6,839 by 2031 and 9,130 by 2041.

⁵ Derived by Econisis applying QGSO medium series population projection growth rates to ABS ERP 2021..

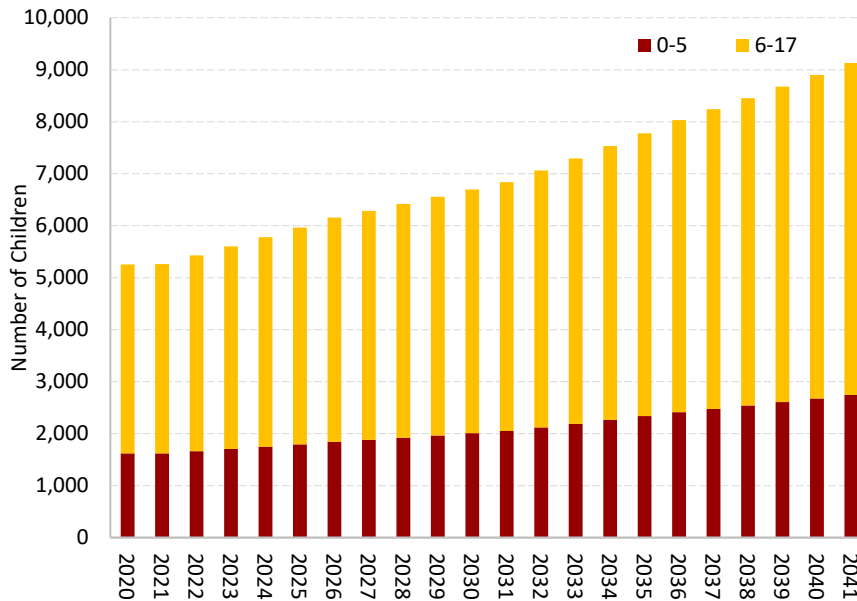


Figure 8 Historical and Projected Population aged 0-5 and 6-17, Catchment Area, 2020 to 2041

2.3 Socio-Economic Profile

2.3.1 Socio-Economic Drivers of Child Care Demand

Historically, women have played the primary role of care givers for children. However, a convergence of socio-economic drivers has resulted in rapid growth in demand for child care demand. These drivers include:

- **Increased female tertiary education participation and qualifications** – the strong and sustained growth in female participation in tertiary educations since the 1970s and 1980s has resulted in women having greater opportunity to pursue a diverse range of occupations and careers.
- **Generational and behavioural change** – similarly, the Baby Boomer and subsequent generations have seen a significant change in social norms and behaviours, resulting in women playing a much greater role in the economy and being more financially independent than in previous generations. This has contributed to a decrease in Australian fertility rate (as more women choose employment over having children in their 20s and early 30s) while also decreasing overall family sizes.
- **Cost of living** – long-term rises in costs of living has encouraged households to maintain two incomes even while having children. While the comparatively recent introduction of paid maternity leave has helped to alleviate some of the financial burdens on household of having the mother (primarily) taking care of the young infant/s, long-term structural household cost increases increasingly see mothers re-entering the workforce.

The long-term prosperity and resilience of households is increasingly linked to levels of female workforce participation, with high levels of unemployment and low participation rates often reflecting areas where opportunities for child care are limited or constrained.

2.3.2 Census Profile

A summary of key attributes of the Cornubia - Carbrook and Loganholme - Tanah Merah SA2s from the 2021 Census of Population and Housing is provided in the table below.

Table 2 Census Profile, Catchment Area SA2s, Logan LGA and Queensland, 2021

Indicators	Cornubia - Carbrook	Loganholme - Tanah Merah	Logan LGA	QLD
Headline				
Population	9,076	11,588	345,098	5,156,138
Median Age	41	25	34	38
Average Household Size	2.9	2.8	2.9	2.5
Share of Population 0-14 (%)	19.2%	22.1%	22.4%	18.7%
Share of Population 65+ (%)	17.1%	12.3%	13.4%	17.0%
Born in Australia	74.0%	71.7%	65.5%	71.4%
Share of People Attending Educational Institutions				
Pre-School	168	229	6350	84,535
Primary	796	1155	32773	426,110
Primary - Government	14.6%	23.4%	20.9%	18.6%
Primary - Catholic	8.7%	5.3%	4.4%	5.1%
Primary - other non-Government	7.8%	4.4%	4.4%	3.4%
Secondary	803	884	26,086	352,608
Secondary - Government	9.2%	15.7%	15.9%	13.3%
Secondary - Catholic	10.7%	4.7%	3.6%	4.6%
Secondary - other non-Government	10.9%	5.1%	4.1%	4.4%
Tertiary	499	610	18,495	334,418
Tertiary - Vocational education (including TAFE and private training providers)	7.0%	6.8%	7.4%	7.0%
Tertiary - University of other higher education	12.4%	10.6%	9.3%	14.2%
Weekly Incomes				
Personal	\$892	\$826	\$736	\$787
Family	\$2,503	\$2,047	\$1,825	\$2,024
Household	\$2,315	\$1,868	\$1,616	\$1,675
Share of Household				
Couple family without children	31.4%	26.3%	25.0%	28.9%
Couple family with children	41.1%	36.1%	35.0%	29.5%
One parent family	10.8%	15.6%	16.0%	12.1%
Other family	0.6%	1.2%	1.0%	1.2%
Lone Person Households	14.2%	18.0%	19.0%	24.2%
Group Households	1.9%	2.8%	3.0%	4.2%
Dwelling Occupancy				
Occupied	95.9%	94.8%	94.7%	90.7%
Unoccupied	4.1%	5.4%	5.3%	9.3%
Dwelling Type				
Separate house	91.0%	88.7%	85.0%	74.8%

Indicators	Cornubia - Carbrook	Loganholme - Tanah Merah	Logan LGA	QLD
Semi-detached, row or terrace house, townhouse etc	5.4%	8.8%	11.8%	11.7%
Flat or apartment	0.6%	1.1%	2.7%	12.5%
Other dwelling	2.6%	1.1%	0.3%	0.7%
Tenure				
Owned outright	32.8%	21.8%	22.6%	29.1%
Owned with a mortgage	51.8%	48.3%	40.0%	34.4%
Rented	13.5%	27.1%	34.6%	33.1%
Other tenure type	0.9%	0.5%	1.0%	1.9%
Tenure type not stated	1.3%	2.2%	1.8%	1.6%

Key findings from the 2021 Census of Population and Housing for the SA2s within the defined catchment include:

- Larger shares of population aged 0-14 and younger median ages in Loganholme - Tanah Merah SA2
- Cornubia - Carbrook has an above average share of population aged 65+
- Above average household sizes, reflecting larger shares of Couple Family with Children Households, in both SA2s.
- Above average shares of primary school attendance in both SA2s
- Above average incomes in both SA2s, with Cornubia - Carbrook having a considerably larger average income.
- Above average share of households owned outright in Cornubia - Carbrook and above average share of houses owned with a mortgage in Loganholme - Tanah Merah.

Overall, this combination of socio-economic attributes in the catchment is highly favourable for child care demand with above average shares of younger aged people, higher primary school participation rates and higher household incomes reflecting above average female workforce participation (particularly in Cornubia - Carbrook SA2)

2.3.3 Unemployment Rate

Data from the Australian Government's Small Area Labour Market series indicates that unemployment in Loganholme - Tanah Merah has consistently trended above that of Cornubia - Carbrook.

Unemployment rates in Loganholme - Tanah Merah fluctuate at a slightly more drastic rate than Cornubia - Carbrook. The unemployment rate oscillations are consistent with both SA2s. The unemployment rate for the catchment area increased significantly in 2020, as a combination of a slowing labour market and rapid increasing labour force participation in the area drove demand for jobs, though has rapidly declined as of 2022.

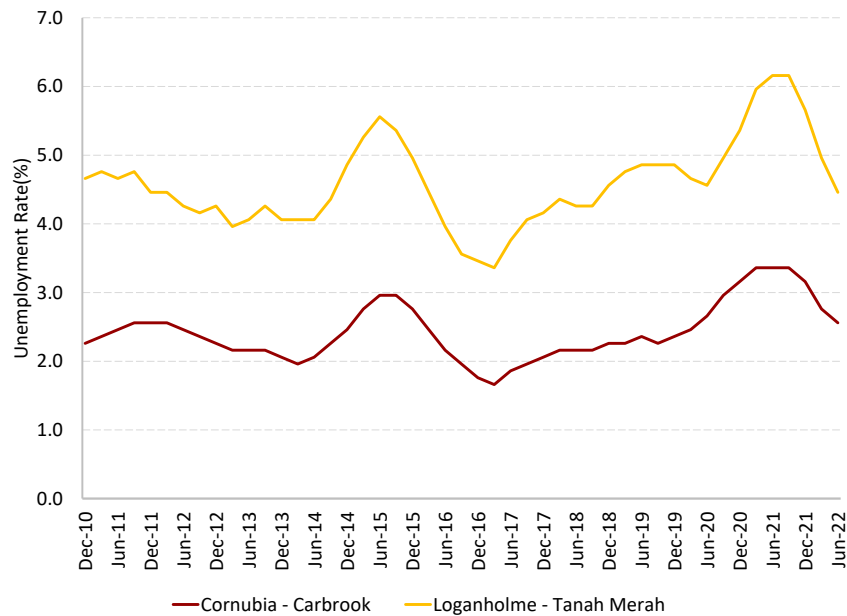


Figure 9 Unemployment Rate, Cornubia - Carbrook and Loganholme Tanah Merah South SA2s (ASGS 2016), 2010 to 2022⁶

⁶ Department of Jobs (2023) SALM June 2022 accessed at jobs.gov.au

3 CENTRE-BASED CHILD CARE DEMAND

This section provides an assessment of the demand for centre-based child care places within the catchment.

3.1 Children in Care

Not all children participate in child care. Data from the Australian Government Department of Education publishes quarterly estimates of child care demand, by type and region across Australia. Estimates for the Loganlea - Carbrook SA3 (within which the Cornubia - Carbrook SA2 and Loganholme - Tanah Merah SA2 is located) is that 64.8% of children aged 0-5 and 15.8% of children aged 6-17 attended some form of care in the year to June 2021⁷.

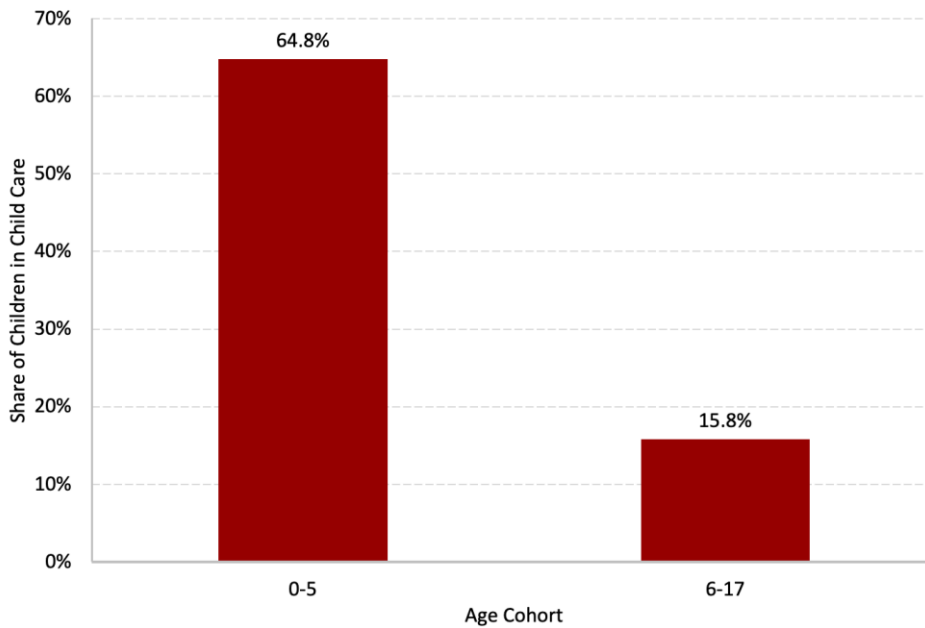


Figure 10 Share of Children in Child Care, Loganlea - Carbrook SA3⁸

Applying these rates to the catchment population projections, and Econisis estimates that the number of children participating in care is expected to increase from 1,673 in 2022, 1,876 in 2026, 2,087 in 2031 and 2,788 in 2041.

⁷ Department of Education (2022) Child Care data for June quarter 2021, Australian Government, Canberra

⁸ As Above

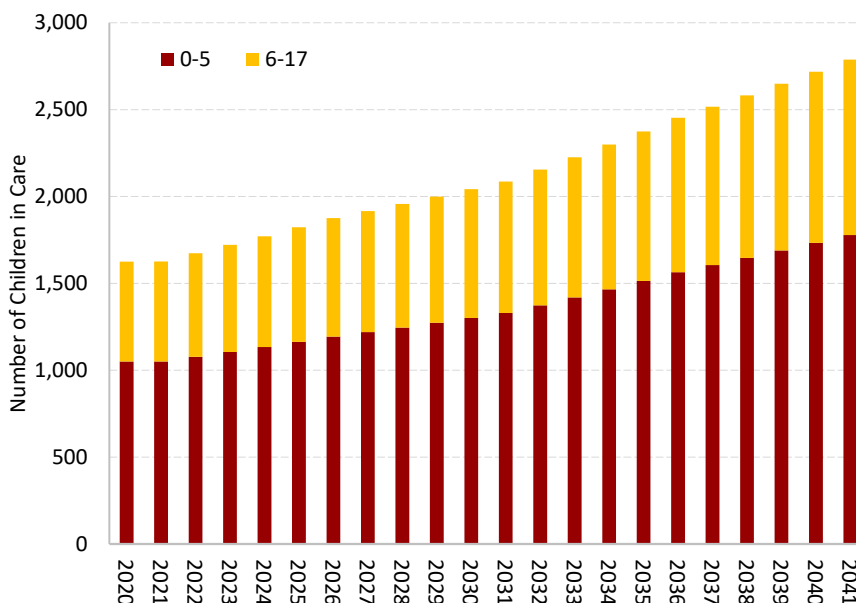


Figure 11 Number of Children in Care, Catchment Area, 2020 to 2041

As expected, 0-5 year children account for the largest share of children in care in the catchment across the assessment period, with children aged 6-17 accounting for a smaller but growing share over time as the population of the catchment ages.

3.2 Centre-Based Long-Day Care

Centre-based long-day child care represents one of four main types of care available to families in Australia. The other categories include:

- Family Day Care,
- Occasional Care and
- Outside of School Care.

In 2021, Centre-based care accounted for approximately 57.8% of all children in care in Queensland⁹. Applying this rate and Econisis estimates the demand for centre-based care in the catchment will increase from 967 in 2022 to 1,084 in 2026, 1,206 in 2031 and 1,612 in 2041.

⁹ As above

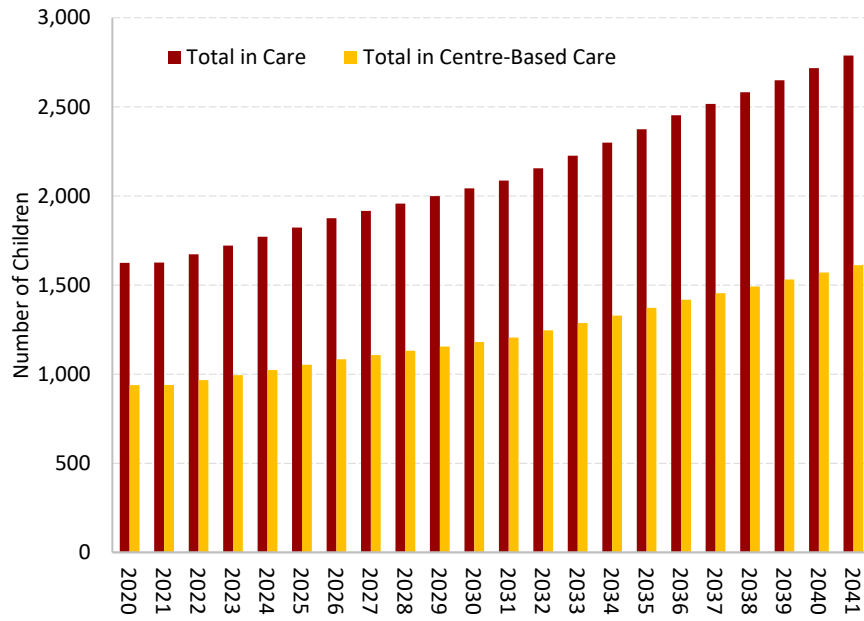


Figure 12 Number of Children in Care, Total and Long-Day Centre Based, Catchment Area, 2020 to 2041

4 CHILD CARE SUPPLY AND GAP

This section profiles current, approved and potential centre-based child care capacity supply and the scale and timing of any gap.

4.1 Child Care Supply

4.1.1 Current Child Care Centres

Econisis reviewed child care centre registration data from the Queensland Department of Education for 2022. Excluding centres that do not provide long-day care (such as those providing family, occasional or before and after school care), Econisis identified a total of 10 child care centres operating within the defined catchment of varying sizes and scale, all offering long-day care¹⁰.

Table 3 Current Child Care Centres (Long-Day Care) Park Ridge Catchment Area

Centre Name	Street Address	Suburb	Number of Approved Places
Play and Learn Early Learning Centre Bismark St	4-6 Bismark Street	LOGANHOLME	75
Play and Learn Early Learning Centre Bismark St	Unit 7/2 Ascot Drive	LOGANHOLME	75
Loganholme Early Learning	3944 Pacific Highway	LOGANHOLME	91
Wandilla Magic Child Care Centre	10-12 Wandilla Crescent	LOGANHOLME	118
Elephas Education Loganholme	1-3 Bimbadeen Dr	LOGANHOLME	80
Piptree Early Learning Tanah Merah	6-8 Pintu Road	TANAH MERAH	75
Cornubia Play and Learn	8 Gleneagles Ave	CORNUBIA	74
Play and Learn Early Learning Centre	2-4 Vincent St	CORNUBIA	90
Bright Horizons Australia Childcare Carbrook	25 Kruger Road	CARBROOK	75
Kingdom Kids - Calvary Christian College Child Care Centre	559 Beenleigh Redland Bay Road	CARBROOK	90
Approved Development			
	109 Timor Avenue	LOGANHOLME	68
Total			911

Additionally, a review of data from Logan City Council identified one additional approved centre at 109 Timor Avenue, Loganholme.

For the purpose of this assessment, Econisis has assumed that approved centre capacity is added to supply in the 2023 to ensure the results are conservative.

4.1.2 Average Centre Size

As a result, Econisis has identified a total of 11 centres with 911 approved places. This represents an average of 82 places per centre, which is regarded as below average.

A review of the latest data from the latest Education Services data set for Queensland from ACECQA from December 2022¹¹ indicates that while all approved child care providers have an average number of places of 77.5, this increases to 85 when only those centres that offer long-day care are

¹⁰ Queensland Government (2023) Education Services as of December 2022, accessed at <https://www.acecqa.gov.au/resources/national-registers>

¹¹ Based on the average of long-day care centres registered in the above

included. This is probably in line with the current average size of centres in the catchment. However, this is not representative of the current market.

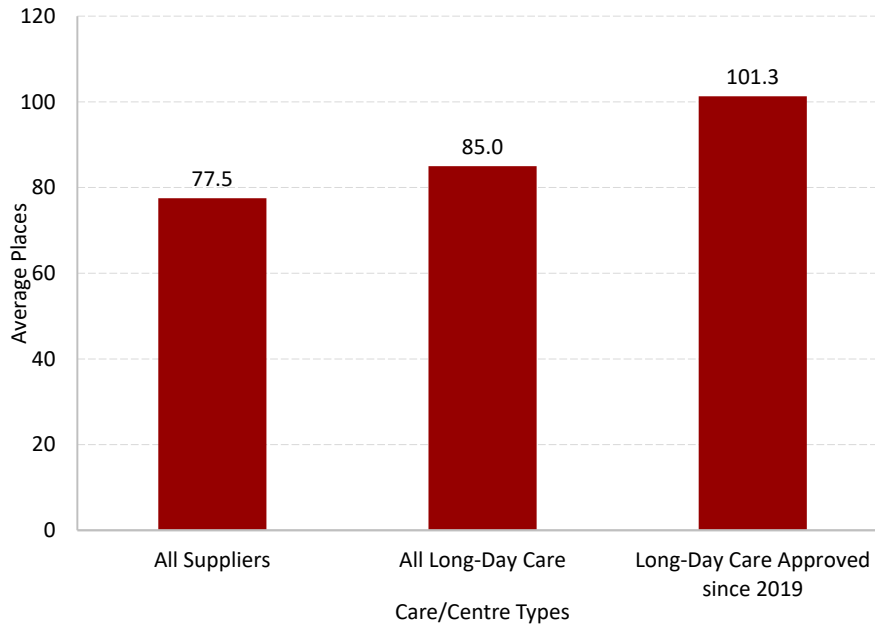


Figure 13 Average Approved Places for Child Care Suppliers, by Supplier Type, Queensland, as at December 2022¹²

A review of the 254 long-day care centres approved since January 1 2019 in the State, indicates an average centre size has been 101.3 places. Additionally, the data indicates that approximately 50% or 127 centres had at least 100 places while 100 centres or approximately 40% had over 110 places.

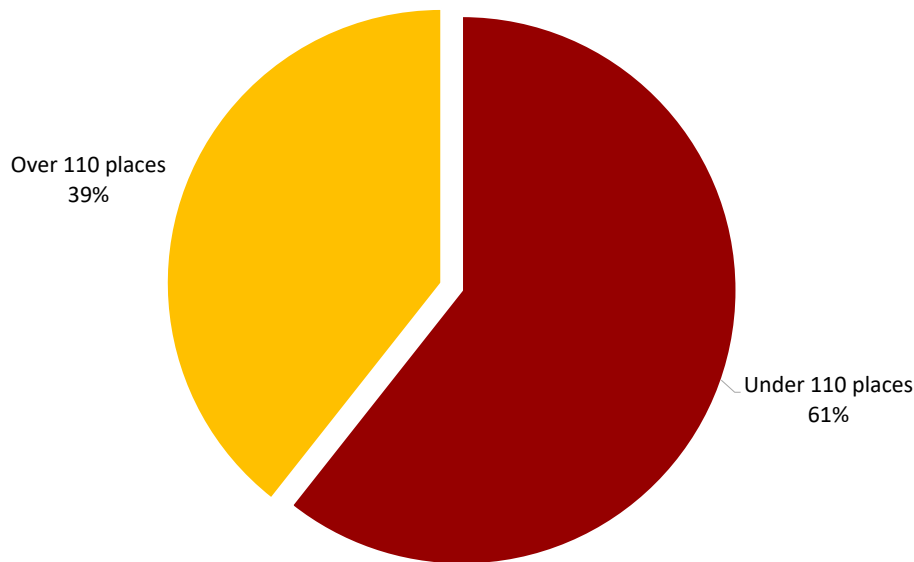


Figure 14 Share of Long-Day Care Centre Suppliers, Places above and below 110, Queensland, January 2019 to December 2022¹³

¹² Queensland Government (2023) Education Services as of December 2022, accessed at <https://www.acecqa.gov.au/resources/national-registers>

¹³ As above

This analysis indicates that new long-day care centres approved in the State over the past 4 years are typically larger than the average size of centres within the catchment. Restricting centre size to historical and increasing outdated averages likely has the perverse impact of reducing overall care quality in the catchment by decreasing centre demand critical mass and capacity to provide higher quality and more diverse offerings to children and their families.

4.2 Supply Gap

Comparing child care places demand with current and approved supply, Econisis confirms that the need for child care places exceeds supply across most of the assessment period. This assumes that all current and approved centres are operating at 100% capacity across the assessment period.

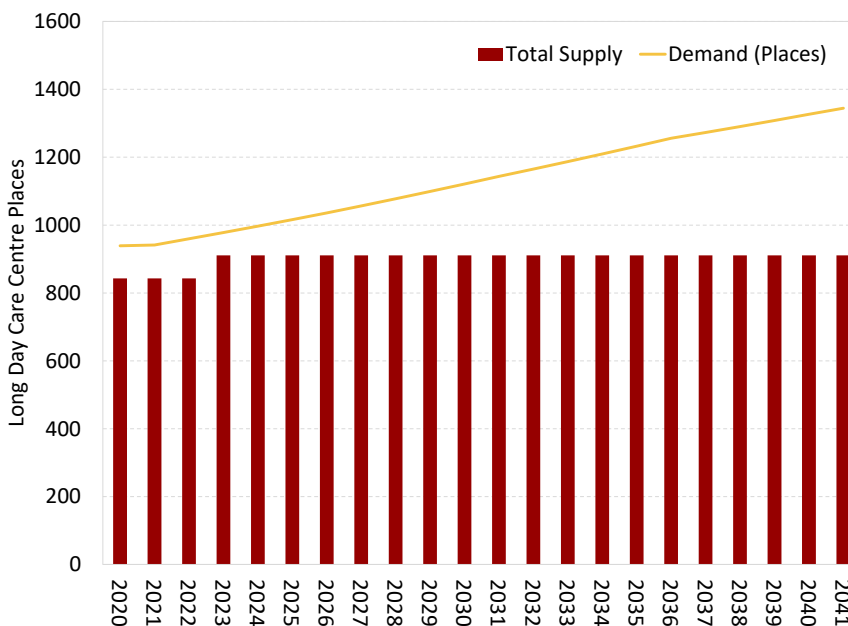


Figure 15 Demand and Supply of Current and Approved Child Care Centre Places, Catchment Area, 2020 to 2041

The supply gap in child care places continues into 2023/24 and is expected to reach a shortfall of 113 places. This is after the approved centre enters the market.

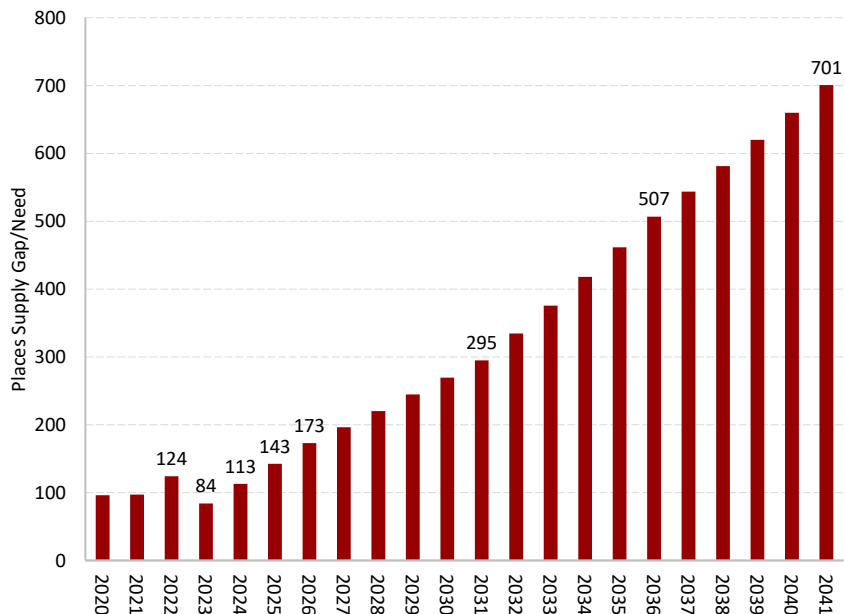


Figure 16 Supply Gap/Need for Child Care Centre Places, Catchment Area, 2020 to 2041

4.2.1 Impact of Proposed Centre

Econisis has modelled the impact on child care places supply and demand with the addition of 112 new places from the 153 Beenleigh Redland Bay Road child care centre. This has been sized based on the estimated gap in the market at the time of the expected opening date of the proposed centre (2023/24).

The inclusion of the proposed supply decreases the shortfall to a balanced position. However, after this, accelerating demand sees the supply gap increase to 60 places in 2026, 181 in 2031 and 588 in 2041.

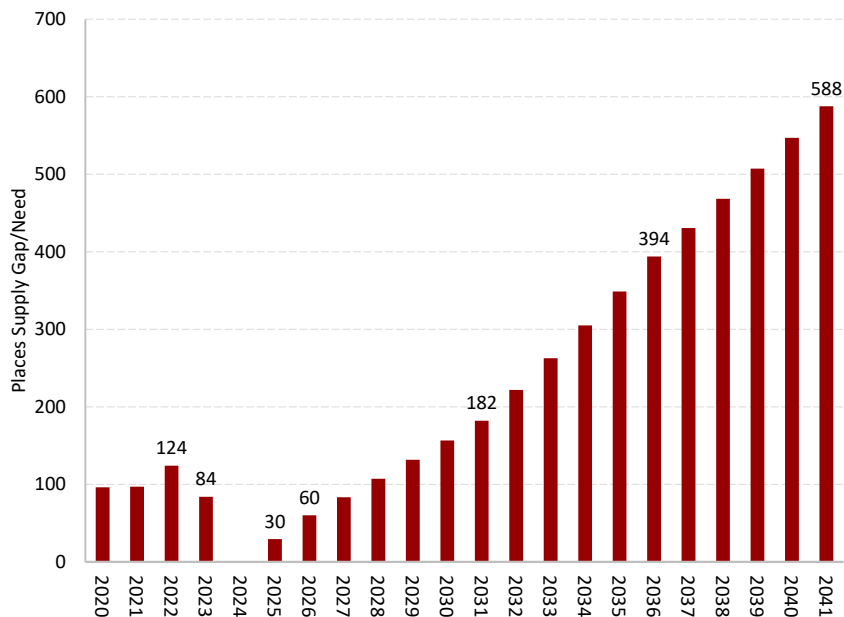


Figure 17 Supply Gap/Need for Child Care Centre Places, Catchment Area, 2020 to 2041

The results of the proposed centre operating 112 places is that the service ratio (the ratio of centre supply to demand never exceed more than 100%. This means that the entrance of the proposed

development to the market will not impact the trading and operating performance of current and approved centres, maintaining the sustainable of care in the area.

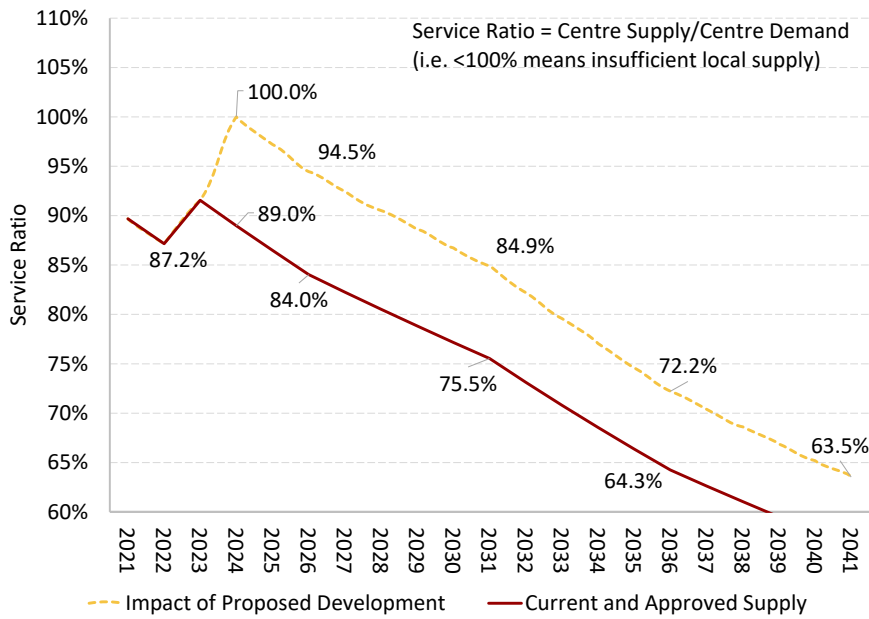


Figure 18 Local Child Care Centre Service Ratios, Main Scenario and Additional Supply, Catchment Area, 2020 to 2041

4.3 Implications for Subject Site

The continuation of a supply gap in the defined catchment, after the proposed centre is added, means there remains an ongoing need for additional centres in the medium and long-term. The proposed development is expected to enter the market in the short-term, before major residential growth is projected to occur from the State Government population projections. This means that the centre is targeting an existing gap across the catchment, leveraging its strategic position relative to travel patterns and school sites to provide a convenient and conducive service offering.

5 DEVELOPMENT IMPACT

This section identifies any potential impacts from the proposed child care development and socio-economic justification.

5.1 Overall Impact Statement

Based on the analysis within this report, Econisis is of the opinion that the proposed development of at 153 Beenleigh Redland Bay Road, Cornubia will have no significant, structural, or long-term impacts on the viability of existing, approved or proposed centres within the defined catchment. By maintaining centre capacity at 112 places, this meets the emerging supply gap in the catchment after the current approved centre enters the market, while also not being solely reliant on future population growth projections from the State Government.

Long-term growth projections indicate extreme strong growth in child care demand. This raises serious risks to the community of supply not keeping up with demand, forcing households to access services outside of the region and imposing associated travel costs.

The analysis in this report confirms that either the fully approval of the subject proposal or the combined approval of the subject proposal AND 109 Timor Avenue site represent sustainable solutions to meeting the short and medium term child care needs of the area.

Service ratios under both scenarios do not exceed 100%,. This indicates an extremely low level of impact on current centre operations and sustainability the proposed development on the child care centre network in the area. Any impact that is likely to occur will be marginal, temporary and offset by the benefits that the proactive delivery of child care capacity will provide the catchment area in the face of rapid population and demand growth.

5.1.1 Network Distribution

The subject site is also optimally placed within the local centre network, not only to service emergent needs linked to the emerging growth in population and housing in the southwest of logan, but also by helping to improve the distribution of centres across the catchment and address the current concentration of centre further to the west.

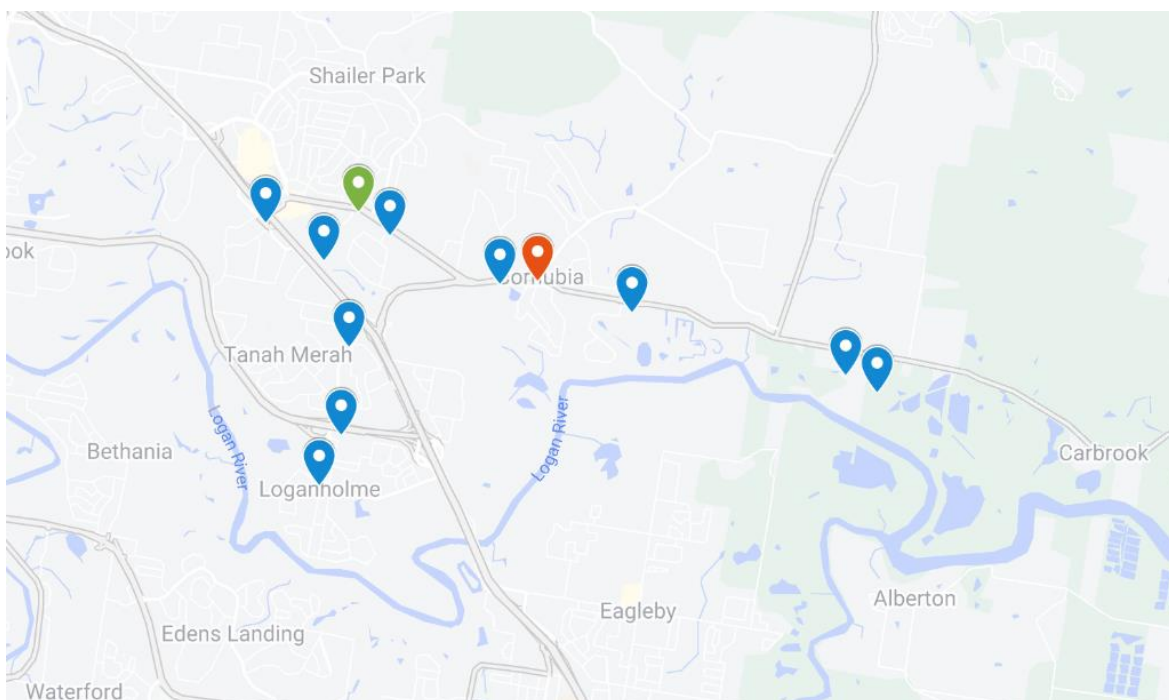


Figure 19 Distribution of Existing (Blue), Approved (Green) and the Subject Site (Orange)

5.1.2 Travel Patterns

A review of Queensland Government Traffic Census information for 2021 indicates that Beenleigh Redland Bay Road is a significant arterial road. Average Annual Daily Traffic (AADT) estimates for the nearest collection site 350m west of the intersection with California Creek Road was for a traffic volume of 44,410 vehicles. This is well above the AADT of Beenleigh Redland Bay Road further to the east at the California Creek Bridge West Abutment of 18,432.



Figure 20 Subject Site and Traffic Census Collection Point, 2021¹⁴

This reflects the fact that the subject site is optimally located to act as a traffic intervention and connection point, capturing passing traffic from the continuation of Beenleigh Redland Bay Road to the east as well as from the wider catchment to the north serviced by California Creek Road.

¹⁴ Queensland Government (2022) Open Data Portal – 2021 Traffic Census Data – Google Earth KML accessed at <https://www.data.qld.gov.au/dataset/traffic-census-for-the-queensland-state-declared-road-network/resource/dc82ec39-4513-437c-8d07-ecb08474a065>

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