

## **Appendix D: Childcare Needs Assessment Report**

Prepared by Business Geographic Pty Ltd



# Waterford West Childcare Need and Impact Assessment

3/92 Chambers Flat Road, Waterford West

Prepared for AELC Group Investments Pty Ltd

Prepared by Colliers Urban Planning

30 January 2026 | 3250278



**'Gura Bulga'**

Liz Belanjee Cameron

'Gura Bulga' – translates to Warm Green Country. Representing New South Wales.



**'Dagura Buumarri'**

Liz Belanjee Cameron

'Dagura Buumarri' – translates to Cold Brown Country. Representing Victoria.



**'Gadalung Djarri'**

Liz Belanjee Cameron

'Gadalung Djarri' – translates to Hot Red Country. Representing Queensland.

Colliers Urban Planning acknowledges the Traditional Custodians of Country throughout Australia and recognises their continuing connection to land, waters and culture.

We pay our respects to their Elders past and present.

In supporting the Uluru Statement from the Heart, we walk with Aboriginal and Torres Strait Islander people in a movement of the Australian people for a better future.

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Version No.	Date of issue	Prepared by	Approved by
A (DRAFT)	31/10/2025	ED	SS
B (DRAFT no 2)	01/12/2025	ED	ED
C (FINAL)	30/01/2026	ED	ED

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# Contents

Executive Summary .....	5
Introduction .....	6
1.0 Site Context and Proposed Development .....	7
1.1 Subject Site and Location Context .....	7
1.2 Proposed Development.....	8
1.3 Planning Overview .....	9
2.0 Catchment Area Analysis .....	10
2.1 Catchment Area Definition.....	10
2.2 Catchment Area Population.....	12
2.3 Socio-Demographic Characteristics .....	13
3.0 Childcare in Australia .....	15
3.1 Childcare Overview .....	15
3.2 Childcare Participation and Attendance Rates .....	15
4.0 Supply of Childcare Centres.....	17
4.1 Existing Childcare Centres.....	17
4.2 Approved Childcare Centres .....	18
4.3 Occupancy Rates .....	18
5.0 Childcare Demand, Benefit and Impact Analysis .....	20
5.1 Childcare Demand Analysis .....	20
5.2 Benefit Considerations .....	21
5.3 Impact Analysis.....	22
5.4 Alternate Site Considerations .....	22
6.0 Summary and Conclusion .....	23

## Figures

Figure 1	Subject Site and Local Context .....	7
Figure 2	Proposed Site Plan .....	8
Figure 3	Proposed Floor Plan.....	8
Figure 4	Catchment Area and Location of Childcare Centres.....	11
Figure 5	Catchment Area New Building Approvals, 2017-2024 .....	12

## Tables

Table 1	Catchment Area Population Estimates and Projections, 2016-2041 .....	12
Table 2	Socio-Economic Profile of Catchment Area Population, 2021 .....	14
Table 3	Queensland Centre Based Care - Long Day Care Enrolments.....	16
Table 4	Existing Childcare Centres in Catchment Area (Long Day Care).....	17
Table 5	Approved Childcare Centres Within Surrounding Area (Long Day Care) .....	18
Table 6	Study Area SA2s – ECEC Enrolments 2020 - 2024 and Current Long Day Care Places .....	19
Table 7	Long Day Care Childcare Demand Analysis – Catchment Area 2025 – 2032 .....	21

# Executive Summary

## Site Context

The Subject Site is located at 3/92 Chambers Flat Road, Waterford West, approximately 25km south of the Brisbane CBD. The proposal is for a 121-place childcare centre including eight activity rooms.

## Catchment Area

A Catchment Area has been defined for the proposed childcare centre which reflects its location on Chambers Flat Road. The population of the Catchment Area is projected to increase from 35,810 at 2025 to 41,330 at 2036.

The socio-demographic profile of the Catchment Area reveals that the local population is characterised by a high proportion younger family households with children, earning lower income levels and with lower levels of home ownership.

## Childcare in Australia

Childcare in Australia has evolved significantly over the last 20-years. An increasing number of females are returning to the workforce after childbirth and are looking for long day care options. Over recent years various Federal Governments have significantly boosted spending on childcare.

The long day care participation rate is calculated at 55.6% for children aged 4 years and under in Queensland in 2024, based on the Queensland Early Childhood Education and Care Services (ECEC) Census.

## Supply and Occupancy Rates

A total 15 childcare centres are identified in the Catchment Area, offering a total of 1,484 long day care places. The childcare centres range in size from 60 places to 151 places, with seven of the existing childcare centres providing 100 places or more. Two childcare centres are approved within the Catchment Area – HomeCo. Marsden (120 places) and Beutel Street, Waterford West (76 places).

A review of the supply of childcare places compared with childcare enrolments reveals a notional occupancy rate of 78% across the five SA2s which encompass the defined Catchment Area. This occupancy rate is considered at the upper end of the range which is considered appropriate for a region.

## Childcare Need

The estimated demand for childcare places in the Catchment Area is estimated to increase over the forecast period from 1,280 places in 2025 to 1,360 places in 2028. The future childcare supply would be 1,801 places inclusive of approved centres as well as the subject proposal. Comparing the estimated demand for childcare places in the Catchment Area with the future supply, inclusive of the subject proposal, results in an estimated average occupancy rate of 76% in 2028. The estimated occupancy rate would increase to 78% in 2032 allowing for population growth in the area.

The occupancy rate for the Catchment Area inclusive of the subject proposal would be appropriate, allowing for adequate choice in the area while ensuring existing centres are viable and can operate successfully. This analysis demonstrates that sufficient demand exists for proposal, based on the available market and the future supply of childcare places in the area.

## Conclusion

The proposed childcare centre at the Subject Site would serve a demonstrated economic and community need for additional childcare places in the Catchment Area. It would cater to the needs of the local population and serve the increasing demand for centre-based childcare places in the area driven by the growing number of young families and increasing childcare participation rates. The proposal would also provide an important community service by supporting female workforce participation as well increasing childcare choice for parents.

The proposed childcare centre is assessed to not adversely impact existing childcare centres in the Catchment Area or delay the development of approved childcare centres in area. This primarily reflects that the demand for childcare places in the area will continue to increase, a sufficient market exists to support the proposal as well as the existing and approved childcare centres in the Catchment Area. Overall, as it relates to economic considerations, the planned childcare centre is an appropriate use for the Subject Site.

# Introduction

## Background

A childcare is proposed at 3/92 Chambers Flat Road, Waterford West, immediately adjacent to the Marsden District Centre. Neighbouring uses include a cash wash facility and a fast food outlet.

A pre-lodgement meeting was held with Council on 31 July 2025. In the meeting Council expressed a desire to better understand the economic, community and planning need for the development.

An economic and community need and impact assessment has been requested to be prepared in accordance with Schedule 6.2.2 Planning Scheme Policy 2 – Economic Need and Impact Assessment to investigate the need of the proposed childcare centre and identify any potential economic impacts associated with the development.

## Report Objective

This objective of this report is to examine the market need for the proposed childcare centre at the Subject Site and assess the potential implications if the centre is developed.

## Report Structure

This report contains the following chapters:

- |            |   |
|------------|---|
| Chapter 1: | Site Context and Proposed Development         |
| Chapter 2: | Catchment Area Analysis                       |
| Chapter 3: | Childcare in Australia                        |
| Chapter 4: | Supply of Childcare Centres                   |
| Chapter 5: | Childcare Demand, Benefit and Impact Analysis |
| Chapter 6: | Summary and Conclusion                        |

# 1.0 Site Context and Proposed Development

This Chapter discusses the site context, reviews the proposed development, and considered the planning context for the development.

## 1.1 Subject Site and Location Context

The Subject Site is located at 3/92 Chambers Flat Road, Waterford West. Located within the City of Logan, the Subject Site is approximately 25km south of the Brisbane CBD. Land uses adjacent to the Subject Site to the immediate east include a car wash facility and a KFC restaurant. Chambers Flat Road is a key traffic route through the area connecting Waterford West and Marsden with the suburbs of Loganlea, Crestmead, Park Ridge, and Logan Reserve.

The Subject Site is situated within the Low-Medium Density Residential zone and is directly adjacent to the Centre zone – Marsden District Centre (refer **Figure 1**). The Centre zone extends north-east along both sides of Chambers Flat Road and encompasses HomeCo. Marsden, a major retail shopping centre, as well as a range of other businesses. At present one childcare centre is located within the Centre zone in Marsden (Marsden Early Learning Centre), while Hatchlings Early Learning Centre is located immediately east of the Centre zone within the Low-Medium Density Residential zone. A childcare centre is also proposed at HomeCo. Marsden.

Residential housing mostly surrounds the Subject Site, outside of the Centre zone. Approximately 300 meters south-west of the Subject Site is Marsden State High School. The school is one of the largest secondary schools in Queensland, with over 3,500 enrolments and extensive facilities including a performing arts centre and sports centre.

The proposed childcare centre would be conveniently accessible from Chambers Flat Road as well as from Moffatt Road to the south. It would also be situated in close proximity to a range of existing shopping facilities within Marsden District Centre.



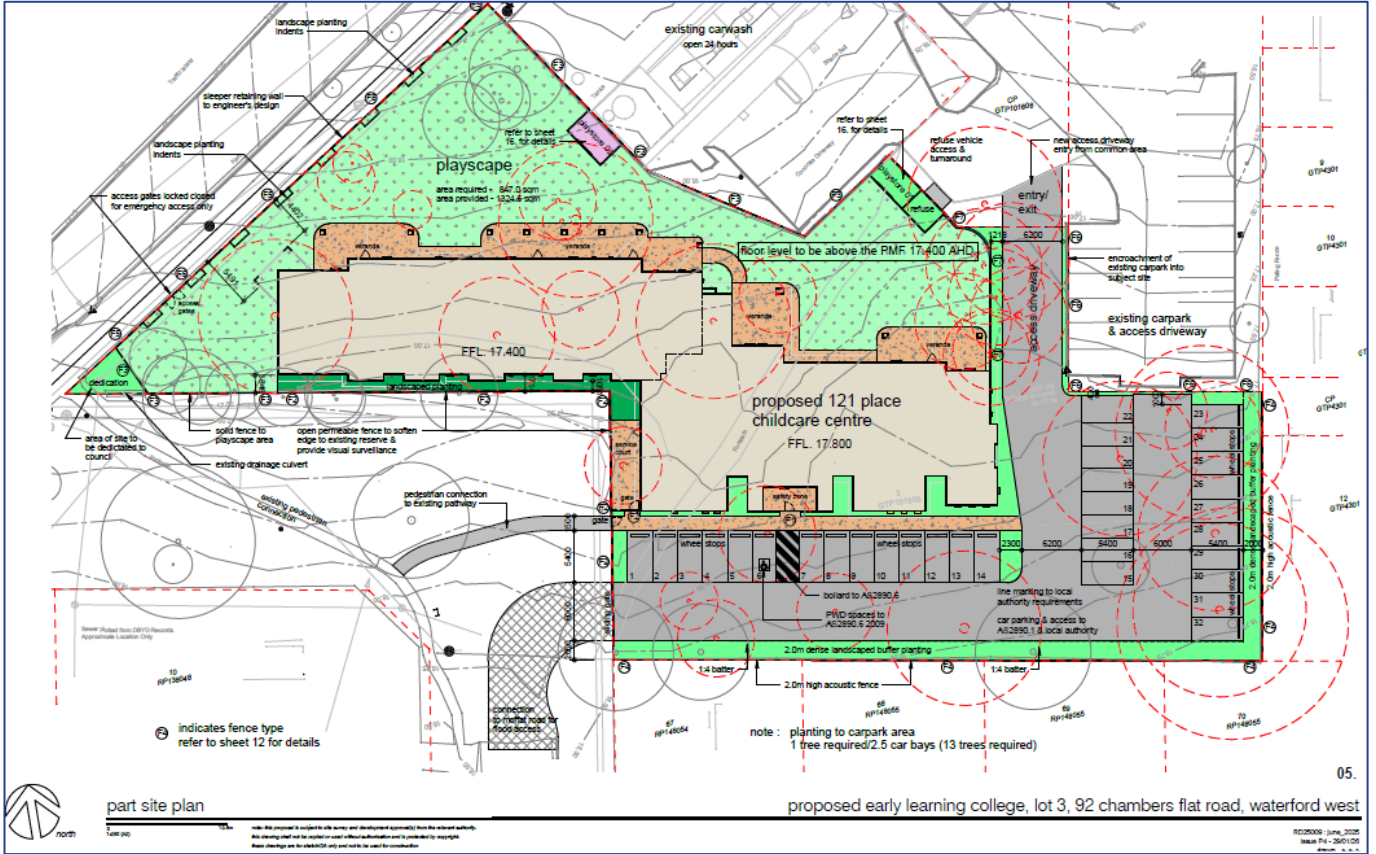
**Figure 1** Subject Site and Local Context

Source: Colliers Urban Planning

## 1.2 Proposed Development

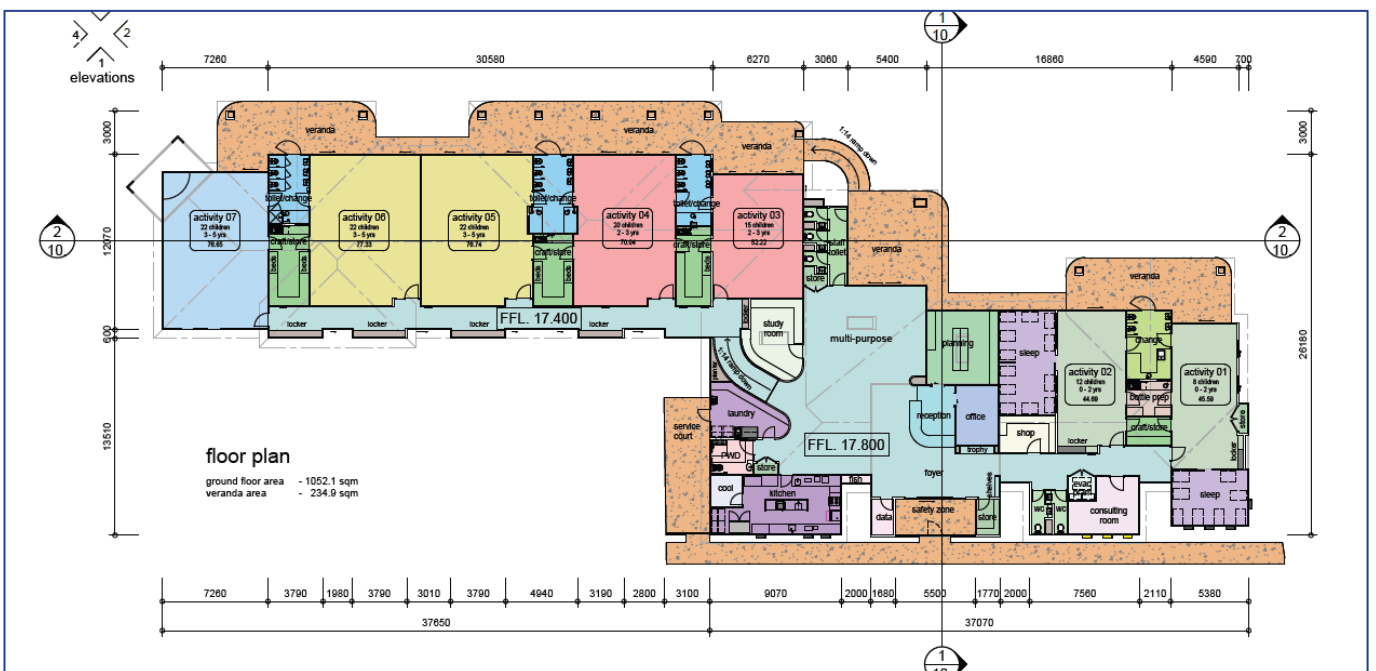
The proposed development is for a 121-place childcare centre with eight activity rooms, together with outdoor play space and carparking.

A site plan is provided as **Figure 2** and the floor plan is provided as **Figure 3**. Traffic access to the proposed childcare centre is to from Chambers Flat Road to the north and from Moffatt Road to the south.



**Figure 2** Proposed Site Plan

Source: Raymond Design



**Figure 3** Proposed Floor Plan

Source: Raymond Design

### 1.3 Planning Overview

The Logan Planning Scheme 2015 (the Scheme), of which Version 9.2 became effective on 1 July 2025, was prepared to provide a framework for managing development within the municipality.

Part 3 of the Scheme outlines the Strategic Framework. The Strategic Framework sets the policy direction for the planning scheme and forms the basis for ensuring development in the municipality is appropriate.

Under Schedules, SC6.2.2 sets out *Planning Scheme Policy 2 - Economic Need and Impact Assessment*. The purpose of the planning scheme policy is to assist with the implementation of the Scheme by specifying the information requirements for the preparation and submission of an economic need and impact assessment report. The stated purpose under Part 2 (2.1.1) is as follows:

*"The purpose of the economic need and impact assessment report is to:*

- a. demonstrate that there is community, economic and planning need for the development;*
- b. demonstrate that the development is of an appropriate size;*
- c. identify and address the economic impacts associated with the development and the effects on existing and designated centres;*
- d. demonstrate that there are no other sites available in a designated centre or sequentially closer to a designated centre that could accommodate the proposed development."*

## 2.0 Catchment Area Analysis

A review of the catchment area expected to be served by the proposed childcare centre is provided in this Chapter, including an assessment of population forecasts and demographic characteristics.

### 2.1 Catchment Area Definition

A catchment area describes the geographic region within which a facility is likely to capture a significant share of its business. The extent of a catchment area for any facility is shaped by several factors including:

- The relative attraction of the facility in question compared with alternative facilities.
- The location, scale and quality of competing facilities in the surrounding region.
- The available road network and public transport service and how they operate to affect ease of use and access to the facility in question.
- Location and significance of employment areas and the journey to work patterns of workers.
- Significant physical barriers which can act to delineate the boundaries of a catchment area.

The extent of the Catchment Area defined for a future childcare centre at the Subject Site reflects the following key factors:

- The location and accessibility of the Subject Site, which fronts Chambers Flat Road and is immediately adjacent to the Marsden District Centre.
- The planned scale of the childcare centre, which is to include 121 places.
- The location and scale of existing and proposed childcare facilities in the surrounding area.
- The existing road network in the surrounding area.

The **Catchment Area** defined for the proposed childcare centre covers the local area, extending around 2-2.5km from the Subject Site and encompassing an area within an approximate 5-6 drivetime. It extends to Logan Motorway in the north, Loganlea Road and Logan Reserve Road to the east, Killara Boulevard to the south, and Waratah Drive/Second Avenue to the west.

The defined Catchment Area and the location of childcare centres in the surrounding region is shown on **Figure 4**.

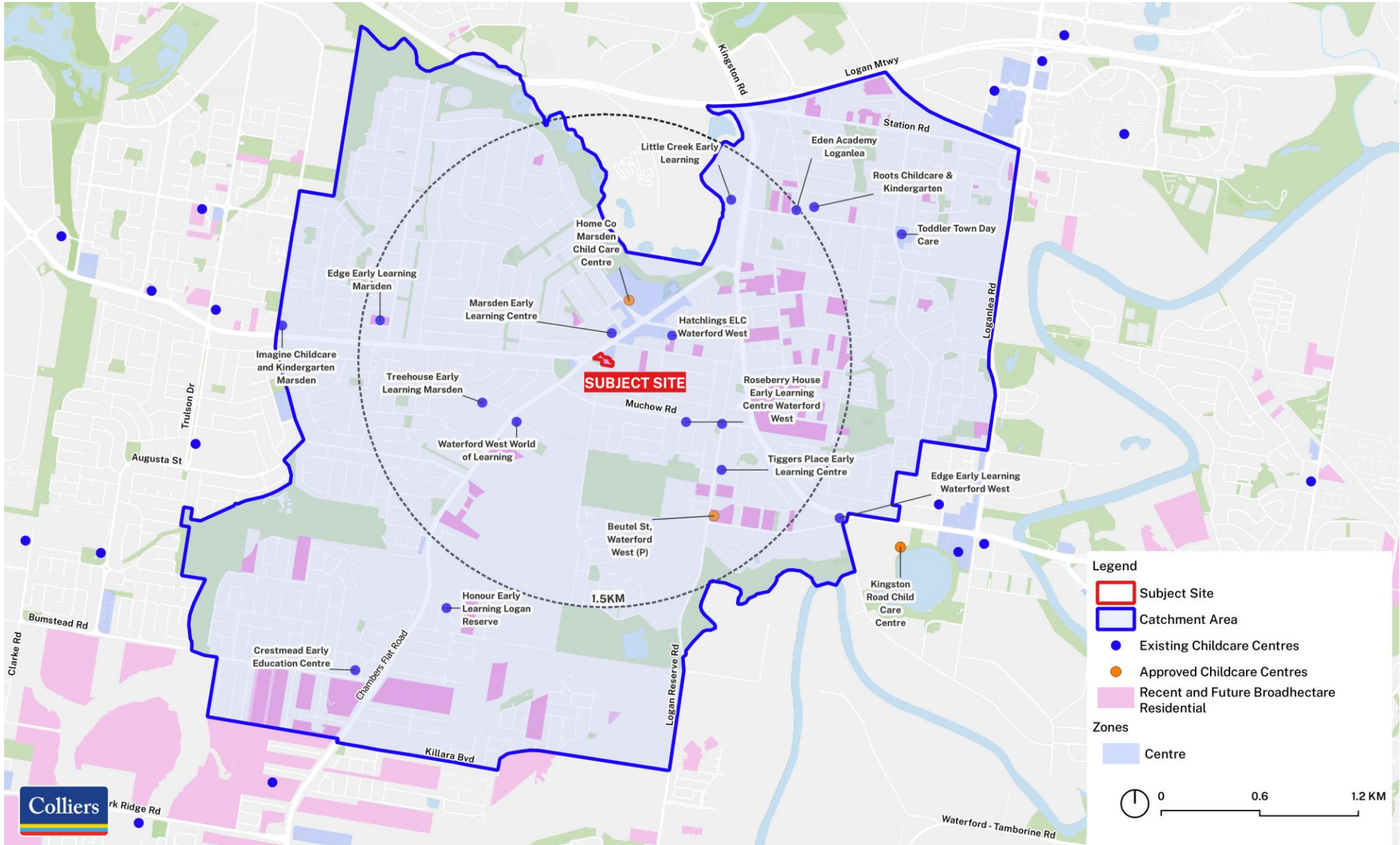


Figure 4 Catchment Area and Location of Childcare Centres

Source: ACECQA; Cordell Connect; Queensland Government Statistician's Office (Broadhectare land); Colliers Urban Planning

## 2.2 Catchment Area Population

Much of the land surrounding the Subject Site is occupied by suburban residential housing, with infill development driving recently population growth. The population of the Catchment Area increased from 26,510 residents in 2016 to 35,810 residents 2025, reflecting average growth of +1,030 residents per annum or a growth rate of +3.4% per annum, as shown in **Table 1**.

A review of new building approval data from the ABS reveals the amount of housing development in the area. New building approvals in the Catchment Area have fluctuated from 2017 to 2024, with an average of 342 new building approvals per annum and a total of 2,735 building approvals over the period. In 2018, new building approvals peaked at 663, with 503 new dwelling approvals in 2021, refer **Figure 5**.

A solid rate of population growth is projected in the Catchment Area for the period to 2041, with an average growth of +350 residents per annum reflecting a growth rate of +0.9% per annum. Various infill sites exist across the Catchment Area which are planned to accommodate future residential housing. The areas designed for future residential development are illustrated on the previous **Figure 4**, which shows land identified for broad hectare residential as published by the Queensland Government Statistician's Office.

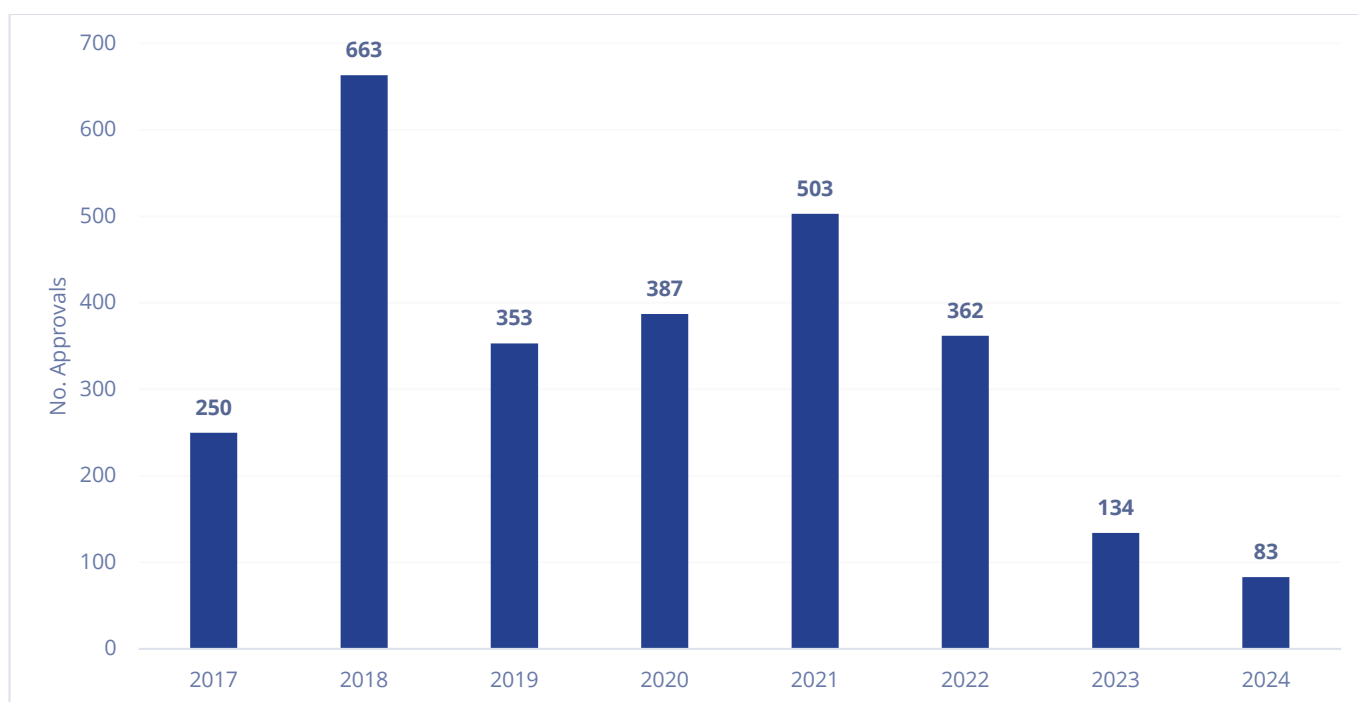
At 2041, the population of the Catchment Area is forecast to reach 41,330 residents, representing a total increase of +5,520 residents over the forecast period.

Historical population levels for the Catchment Area have been estimated by using ABS Estimated Resident Population (ERP) data, which is considered the most accurate and up-to-date population data available in Australia. Population projections are based on data published by the ABS, population projections prepared by the Queensland Government, as well as other research undertaken by this office.

**Table 1** Catchment Area Population Estimates and Projections, 2016-2041

Population (no.)	2016	2021	2025	2028	2032	2036	2041	2016 - 2025	2025 - 2041
Population	26,510	31,290	35,810	37,760	39,290	40,340	41,330	+9,300	+5,520
Average Annual Growth (no.)		+960	+1,130	+650	+380	+260	+200	+1,030	+350
Average Annual Growth Rate (%)		+3.4%	+3.4%	+1.8%	+1.0%	+0.7%	+0.5%	+3.4%	+0.9%

Source: ABS: Queensland Government Population Projections; Colliers Urban Planning



**Figure 5** Catchment Area New Building Approvals, 2017-2024

Source: ABS Building Approvals; Colliers Urban Planning

## 2.3 Socio-Demographic Characteristics

Socio-demographic characteristics of a Catchment Area population are an important factor to consider for the analysis of childcare need for the community.

The socio-demographic profile of the Catchment Area population, as sourced from the 2021 ABS Census of Population and Housing, is compared with Greater Brisbane in **Table 2**. The key points drawn from the data are as follows:



Income

### Lower household income

Residents in the Catchment Area earn -23.9% less income on a per capita basis, and -26.8% less income on a per household basis, compared with the Greater Brisbane benchmark.



Age Profile

### Younger resident population

The median age of the Catchment Area is 30.0 years, which is much younger than the 36.8 years average across Greater Brisbane. The share of 0-4 year olds in the Catchment Area is 8.5% of the population, compared with 6.0% across Greater Brisbane.



Household Composition

### Higher share of family with children households

The proportion of couple families with children (32.6%) is generally consistent with the Greater Brisbane average (32.2%), although the share of single parent families is significantly higher in the Catchment Area (20.0%) compared with Greater Brisbane (11.9%).



Dwelling Tenure

### Higher share of dwellings rented

Only 15.1% of dwellings are owned outright and 29.8% are owned with a mortgage in the Catchment Area, notably less than for Greater Brisbane (26.4% and 36.9% respectively). Over half of private dwellings in the Catchment Area are rented.



Dwelling Structure

### Most dwellings are detached housing

Separate houses account for 80.9% of all dwellings in the Catchment Area, which is lower than the proportion across Greater Brisbane (73.7%). The average household size is higher at 3.0 persons per dwelling in the Catchment Area, compared with 2.6 persons for Greater Brisbane.



Housing Costs

### Lower housing costs

Median mortgage repayments are -22.0% less than the Greater Brisbane average, at \$1,477 per month. Median weekly rents, at \$343 per week, are also lower (-11.9%) than the Greater Brisbane average.



Industry of Employment

### Resident workers mainly employed in blue collar jobs

The Catchment Area has a higher share of employed residents in blue collar jobs compared with Greater Brisbane. The proportion of employed residents in Machinery Operators & Drivers, and Labourers (16.6% and 16.7% respectively) in the Catchment Area is much higher than the proportion in Greater Brisbane (6.4% and 9.1% respectively).

**The Catchment Area is characterised by a high proportion younger family households with children, earning lower income levels and with lower levels of home ownership. Residents are more likely employed in blue-collar jobs.**

Table 2 Socio-Economic Profile of Catchment Area Population, 2021

Category	Catchment Area	Greater Brisbane
<b>Income</b>		
Median individual income (annual)	\$33,380	\$43,840
Variation from Greater Brisbane median	-23.9%	n.a.
Median household income (annual)	\$71,160	\$97,180
Variation from Greater Brisbane median	-26.8%	n.a.
<b>Age Structure</b>		
0-4 years	8.5%	6.0%
5-19 years	24.1%	19.4%
20-34 years	24.7%	21.7%
35-64 years	33.0%	38.1%
65-84 years	9.1%	13.1%
85 years and over	0.6%	1.7%
Median Age (years)	30.0	36.8
<b>Country of Birth</b>		
Australia	65.2%	73.0%
Other Major English Speaking Countries	12.9%	11.2%
Other Overseas Born	22.0%	15.8%
% speak English only at home	72.4%	82.0%
<b>Household Composition</b>		
Couple family with no children	18.6%	26.4%
Couple family with children	32.6%	32.2%
Couple family - Total	51.2%	58.6%
One parent family	20.0%	11.9%
Other families	1.6%	1.2%
Family households - Total	72.8%	71.7%
Lone person household	22.1%	23.7%
Group household	5.1%	4.6%
<b>Dwelling Structure (Occupied Private Dwellings)</b>		
Separate house	80.9%	73.7%
Semi-detached, row or terrace house, townhouse etc.	16.2%	11.3%
Flat, unit or apartment	2.9%	14.6%
Occupancy rate	94.0%	93.3%
Average household size	3.0	2.6
<b>Tenure Type (Occupied Private Dwellings)</b>		
Owned outright	15.1%	26.4%
Owned with a mortgage	29.8%	36.9%
Rented	54.3%	35.3%
Other tenure type	0.8%	1.3%
<b>Housing Costs</b>		
Median monthly mortgage repayment	\$1,477	\$1,893
Variation from Greater Brisbane median	-22.0%	n.a.
Median mortgage as a share of median household income	24.9%	23.4%
Median weekly rents	\$343	\$389
Variation from Greater Brisbane median	-11.9%	n.a.
Median rent as a share of median household income	25.1%	20.8%

Note: Interpretation of small area data from the 2021 ABS Census should consider potential outcomes from the COVID-19 pandemic.

Source: ABS Census 2021; Colliers Urban Planning

## 3.0 Childcare in Australia

This Chapter provides an overview of the childcare sector in Australia and particularly Queensland.

### 3.1 Childcare Overview

Childcare in Australia has evolved significantly over the last 20 years with an increasing number of females returning to the workforce sooner after childbirth and looking for centre-based long day care options.

Australia has one of the highest levels of university educated females in the world. As a result of having children, the high cost of childcare, and the shortage of places, many women have struggled to return to the workforce after having children. Over the years Governments have stressed the importance of lifting Australia's female participation rate in order to increase the size of the economy.

The Report on Government Services 2025 - Child Care, Education and Training was prepared by the Productivity Commission on behalf of the Steering Committee for the Review of Government Service Provision. Some key findings outlined in the report include the following:

- Total government real recurrent and capital expenditure on Early Childhood Education and Care (ECEC) services was \$18.2 billion in 2023-24, an increase of 17.4% from 2022-23
- Over the last ten years the number of children attending approved childcare services has grown significantly. The attendance rate at childcare services that are approved by the Australian Government for financial support to eligible families for children aged 0–5 years was 50.4% in 2024, up from 42.0% in 2015.
- The Australian Government childcare subsidy has significantly reduced out-of-pocket costs for families, particularly at the lower income levels.

Childcare in Australia takes on a myriad of forms. While many families take advantage of formal care, grandparents and family networks also play a significant role in assisting with informal childcare. There are various types of formal childcare services catering to varied needs and demands of parents. Some of the key types are described briefly as follows:

- **Long day care (LDC):** The predominant form of formal childcare, these facilities cater to children up to school age. Long day care services are generally provided at a building specifically designed for childcare purposes and usually operate between 7.30am – 6.30pm. This type of childcare is the focus for this assessment.
- **Family day care:** Family day care services deliver home-based education services and care for children, and are typically based in educators' homes.
- **Before/after school care and vacation care:** This type of care is provided in locations such as schools and community halls, and largely caters for primary school aged children.
- **Occasional care:** Occasional care is typically short term and on casual basis.

### 3.2 Childcare Participation and Attendance Rates

Given the ongoing increases in childcare funding implemented by the Federal Government over recent years, together with the increasing participation of females in the workforce, childcare participation rates continue to increase.

#### **Long Day Care Participation Rates**

The Queensland Government collects data on childcare services through the Queensland Early Childhood Education and Care Services (ECEC) Census. The annual data collection from the early childhood education and care sector occurs during early August of each year.

At 2024, a total of 187,472 children were enrolled in long day care at childcare centres in Queensland according to the ECEC Census, refer **Table 3**. Total enrolments have increased by around 21,190 since 2020, reflecting an average growth rate of 3% a year. Of all enrolled children in 2024, around 92% were aged 4 years and younger, with 8% aged 5 years (before starting school). It is noted that the figures in 2020 and 2021 may have been impacted by the COVID-19 pandemic.

**Table 3** Queensland Centre Based Care - Long Day Care Enrolments

	2020	2021	2022	2023	2024
0-2 Years	66,679	73,446	76,190	80,239	78,335
3-4 Years	82,819	85,683	88,064	89,893	93,417
<b>Total 4 years and under</b>	<b>149,498</b>	<b>159,129</b>	<b>164,254</b>	<b>170,132</b>	<b>171,752</b>
5+ Years	16,783	19,935	18,124	18,129	15,720
<b>Total</b>	<b>166,281</b>	<b>179,064</b>	<b>182,378</b>	<b>188,261</b>	<b>187,472</b>

\* Includes limited hours care and occasional care services

Source: Early Childhood Education and Care (ECEC) Services Census; Colliers Urban Planning

The childcare participation rate for Queensland can be calculated by comparing the total number of children aged 4 years and younger enrolled in childcare centres in Queensland with the total population of children aged 4 years and younger in Queensland. In 2024, the number of children aged 4 years and under in Queensland was 308,650, according to data published by the ABS.

The long day care participation rate in 2024 is calculated at 55.6% for children aged 4 years and under in Queensland based on this analysis. It is highlighted that the participation rate in Queensland has increased every year over the past five years, and was 48.6% in 2020.

It is noted that the ECEC Census data set includes children who utilise limited hours care or occasional care services, although the numbers are low for children aged under 5 years. The data is based upon enrolments and not children in care, which could result in a potential overstatement of the participation rate as a small number of children may be enrolled in more than one centre at the time of the ECEC Census.

### **Average Weekly Attendance at Centre Based Care**

The Australian Government Department of Education publishes the *Child Care Subsidy* report each quarter. The latest report finds that during the June quarter 2025, the average weekly hours for children in centre-based day care was 34 hours, with Queensland children in centre-based day care averaging a higher 37 hours per week. This reflects an average attendance of three to four days per week.

The average number of hours per week for children in centre-based care has been increasing over recent years, and was 30 hours per week in 2019.

## 4.0 Supply of Childcare Centres

This Chapter reviews the supply of long day care (LDC) childcare centres in the surrounding region.

A summary of the existing and approved childcare centres within the Catchment Area is provided in **Table 4** and **Table 5** respectively, while the previous **Figure 4** illustrates the locations of the childcare centres relative to the Subject Site.

**Table 4** Existing Childcare Centres in Catchment Area (Long Day Care)

Childcare Centre	Address	Approved LDC Places
<b>Crestmead</b>		
Crestmead Early Education Centre	2 Pine Grove Drive	150
<b>Logan Reserve</b>		
Honour Early Learning Logan Reserve	278-282 Chambers Flat Rd	122
<b>Loganlea</b>		
Roots Childcare & Kindergarten	40 Monash Road	65
Toddler Town Day Care	1-5 Sarah Street	75
Eden Academy Loganlea	34 Monash Road	100
Little Creek Early Learning	647 Kingston Road	135
<b>Subtotal</b>		<b>375</b>
<b>Marsden</b>		
Marsden Early Learning Centre	1/93 Chambers Flat Road	70
Edge Early Learning Marsden	6-10 First Avenue	134
Imagine Childcare and Kindergarten Marsden	616-618 Browns Plains Road	151
Treehouse Early Learning Marsden	16 Hickory Street	86
<b>Subtotal</b>		<b>441</b>
<b>Waterford West</b>		
Hatchlings ELC Waterford West	38 Bourke St	75
Waterford West World of Learning	154-156 Chambers Flat Rd	108
Roseberry House Early Learning Centre Waterford West	2 Carnation Street	84
Edge Early Learning Waterford West	1-3 Beutel Street	69
Tiggers Place Early Learning Centre	78 Logan Reserve Road	60
<b>Subtotal</b>		<b>396</b>
<b>Total Existing</b>		<b>1,484</b>

Source: Australian Children's Education & Care Quality Authority; Colliers Urban Planning

### 4.1 Existing Childcare Centres

A total 15 childcare centres are identified in the Catchment Area, offering a total of 1,484 long day care places. The childcare centres range in size from 60 places to 151 places. Seven of the existing childcare centres provide 100 places or more.

The closest childcare centres to the Subject Site are as follows:

- Marsden Early Learning Centre is located approximately 170 meters north-east of the Subject Site, on Chambers Flat Road within the Centre zone. It offers 70 LDC places with on-site car parking accessible from Brigalow Street.
- Hatchlings Early Learning Centre is located at 38 Bourke Street, Waterford West and offers 75 LDC places. It is located adjacent to the Marsden District Centre within the Low-Medium Density Residential zone.
- Waterford West World of Learning is located on Chambers Flat Road approximately 650 meters south of the Subject Site near Marsden State High School. It offers 108 places.

## 4.2 Approved Childcare Centres

Within the Catchment Area two childcare centres have received development approved, as follows:

- A 120 place centre is approved to be development within the carpark of HomeCo. Marsden, fronting Tamarind Street in the northern part of the Marsden District Centre.
- A childcare centre has approval for 76 places at 83-87 Beutel Street, Waterford West, located at the intersection with Logan Reserve Road. The site is within the Low Density Residential zone.

Beyond the Catchment Area, a childcare centre at 891 Kingston Road, Waterford West has received development approval for 99 long day care places. Also outside the Catchment Area, a childcare centre at 1 Halcyon Way, Logan Reserve was approved in 2018, however the project is understood to be deferred indefinitely.

**Table 5** *Approved Childcare Centres Within Surrounding Area (Long Day Care)*

Childcare Centre	Address	Status	Approved LDC Places
<b>Within Catchment Area</b>			
HomeCo. Marsden	57-77 Chambers Flat Road	Development Approval	120
Beutel St Childcare Centre	83-87 Beutel Street, Waterford West	Development Approval	76
<b>Beyond Catchment Area</b>			
Kingston Road Childcare Centre	891 Kingston Rd, Waterford West	Development Approval	99

Source: Cordell; Colliers Urban Planning

## 4.3 Occupancy Rates

The notional occupancy rates for long day care centres can be estimated by comparing the number of children enrolled at childcare centre compared with the number of childcare places provided in an area. The analysis of occupancy rates is only indicative as there will be inflow and outflow of childcare enrolments in an area given people will often travel outside the local area to choose their preferred childcare centre due to a range of factors. However, the analysis does provide a general indication of the occupancy level in a specific broad area.

The Queensland Early Childhood Education and Care Services (ECEC) Census provides data on the number of enrolments at childcare centres across Queensland. The data is available at the ABS Statistical Area 2 (SA2) level, which generally covers one or two suburbs. It is noted that there are some limitations to the ECEC Census data, particularly as it relates to only one week of the year, and relies on childcare centres providing accurate information.

The Catchment Area used in this report does not align with SA2 boundaries and extends across parts of five SA2s, including the following:

- Chambers Flat - Logan Reserve
- Crestmead
- Loganlea
- Waterford West
- Marsden

The total number of reported long day care (LDC), limited hours care (LHC) and occasional care (OC) enrolments as sourced from the Queensland childcare census in each SA2 from 2020 to 2024 is shown in **Table 6**. The data shows the strong growth in long day care enrolments across the region, which has averaged 9% per annum over the four years from 2020 to 2024.

The current number of long day care places provided in each SA2 is also detailed. Using the data from the ECEC Census, compared with the number of long day care places in each area, the notional occupancy rates for each SA2 can be estimated. For the calculation it is assumed that children attending formal childcare attend on average three and a half days a week, based on the average weekly hours for centre-based care as published by the Australian Government Department of Education (refer Chapter 3).

Comparing the total enrolments, adjusted for average attendance, with the provision of long day care places reveals a notional occupancy rate of 78% across the five SA2s which encompass the defined Catchment Area. This occupancy rate is considered at the upper end of the range which is considered appropriate.

It is important to note that given children typically attend childcare on average 3.5 days a week on various days, it is unlikely that childcare centres are ever at full capacity every day. As a general guide, an occupancy rate of around 70% or higher is considered a commercially healthy for childcare centres. An occupancy rate of this order ensures existing centres can operate viably, make a profit and provide a quality service.

It is also important to ensure that an appropriate level of competition and choice is available, and thus a high occupancy level can potentially be an indication of more limited consumer choice. Parents should have access to a wide choice of location and type of centre for the care of their children given the high level of Government funding in the childcare industry. If occupancy levels of childcare centres in an area are too high, the choice of care for parents can be limited. When the occupancy rate exceeds around 75%, supply constraints can result which may impact on choice, particularly for families with multiple children.

**Table 6 Study Area SA2s – ECEC Enrolments 2020 - 2024 and Current Long Day Care Places**

Statistical Area 2	2020	2021	2022	2023	2024	Current LDC places	Est. Occupancy rate
<b><u>Chambers Flat - Logan Reserve</u></b>							
Long Day Care / LHC / OC	85	277	459	503	594		
Based on 3.5 days a week per child	60	194	321	352	416	265	157%
<b><u>Waterford West</u></b>							
Long Day Care / LHC / OC	756	810	871	839	719		
Based on 3.5 days a week per child	529	567	610	587	503	681	74%
<b><u>Crestmead</u></b>							
Long Day Care / LHC / OC	328	409	371	429	431		
Based on 3.5 days a week per child	230	286	260	300	302	419	72%
<b><u>Marsden</u></b>							
Long Day Care / LHC / OC	590	575	562	595	618		
Based on 3.5 days a week per child	413	403	393	417	433	644	67%
<b><u>Loganlea</u></b>							
Long Day Care / LHC / OC	357	356	351	416	614		
Based on 3.5 days a week per child	250	249	246	291	430	658	65%
<b><u>Total</u></b>							
Long Day Care / LHC / OC	<b>2,116</b>	<b>2,427</b>	<b>2,614</b>	<b>2,782</b>	<b>2,976</b>		
Based on 3.5 days a week per child	<b>1,481</b>	<b>1,699</b>	<b>1,830</b>	<b>1,947</b>	<b>2,083</b>	<b>2,667</b>	<b>78%</b>

Source: Queensland ECEC Census; Australian Children's Education & Care Quality Authority; Colliers Urban Planning

# 5.0 Childcare Demand, Benefit and Impact Analysis

This Chapter presents an assessment of the demand for long day care places generated from the resident population within the defined Catchment Area. It also reviews the economic benefits and potential impacts of developing the proposed childcare centre at the Subject Site.

## 5.1 Childcare Demand Analysis

The following analysis is used to determine the likely demand for long day care places in the Catchment Area given the number and age profile of the resident population. It is noted that people will use childcare centres outside the defined Catchment Area, and also people living in the broader region would use childcare centres within the area. The following analysis is to provide a general indication of the potential number of long day care places that can be supported in the Catchment Area based on a range of assumptions.

The demand analysis for long day care childcare facilities in the Catchment Area is provided in **Table 7**, based on the following methodology:

- Determine the population of the catchment (refer Chapter 2) and estimate the number of children aged 0-4 years over the forecast period to 2032. In 2021, the proportion of children aged 0-4 years in the Catchment Area was 8.5%, which is assumed to remain constant over the forecast period.
- Apply an estimated participation rate for children seeking long care day. As outlined in Chapter 3, the childcare participation rate for Greater Brisbane is estimated at 55.6% in 2024 based on Queensland ECEC Census. Childcare participation rates have been increasing for many years and this trend is likely to continue. The participation rate applied in the following analysis is 55% and is assumed to remain constant over the forecast period. Any increase in the participation rate would result in an increase in demand for childcare places.
- Apply an attendance rate of 70% (i.e. an average attendance of 3.5 days a week), which is based on the average weekly hours per child in centre-based care as reported in the Child Care in Australia report June quarter 2025, as published by the Department of Education.
- Make an allowance for children aged 5 years before they attend school. Data from the QLD ECEC Census indicates that children aged 5 years accounted for around 8% of the total number of children enrolled in centre-based care.

Based on this analysis, the estimated demand for childcare places in the Catchment Area is estimated to increase over the forecast period from 1,280 places in 2025 to 1,410 places in 2032. Any net inflow of demand for childcare services in the Catchment Area would result in a higher level of demand.

The 15 childcare centres in the Catchment Area provide a total of 1,484 long day care places. Two childcare centres are approved within the Catchment Area – HomeCo. Marsden (120 places) and Beutel Street, Waterford West (76 places). Once the approved centres are developed, childcare centres within the Catchment Area will offer a total of 1,680 long day care places. A childcare centre with 121-places at the Subject Site would result in a total of 1,801 long day care places in the Catchment Area.

It is important to note that it is unlikely that childcare centres are ever at full capacity every day. As outlined previously it is generally accepted that an occupancy rate of 70% represents a reasonable balance of ensuring adequate choice and competition in an area, though also ensuring existing centres can operate viably, make a profit and provide a quality service.

A high occupancy rate in an area can substantially restrict choice for residents, particularly for specific age groups where availability of days may differ. It is imperative that occupancy rates are not too high, otherwise choice of centre would diminish significantly, particularly for families with multiple children requiring care across different days. This is particularly important for areas which include childcare centres that provide care that is focused on a particular segment of the population, such as centres operated by religious institutions.

Comparing the estimated demand for childcare places in the Catchment Area with the future supply, inclusive of approved childcare centres as well as the subject proposal, results in an estimated average occupancy rate of 76% in 2028. The estimated occupancy rate would increase to 78% in 2032 allowing for population growth in the area. It is emphasised that an increase of the childcare participation rate over time, or a net inflow of demand for childcare services in the Catchment Area would result in a higher average occupancy rate.

This analysis demonstrates that sufficient demand exists for proposal, based on the available market and the future supply of childcare places in the area. The occupancy rate for the Catchment Area inclusive of the subject proposal would be appropriate, and above 70% which is a reasonable balance of providing adequate choice in the area while ensuring existing centres are viable and can operate successfully.

**Overall, comparing the estimated need with the existing/future supply of centre-based childcare places in Catchment Area demonstrates that sufficient demand exists for the proposed childcare centre with 121 places at the Subject Site.**

**Table 7** Long Day Care Childcare Demand Analysis – Catchment Area 2025 – 2032

Item	2025	2028	2032
Catchment Area population	35,810	37,760	39,290
Est. children aged 0-4 years (at 8.5% of total)	3,060	3,230	3,360
<b>Participation rate 55%</b>			
Est. demand for childcare places (0-4 years)	1,680	1,780	1,850
<b>Apply typical attendance rate of 70% (3.5 days a week)</b>			
Est. average daily demand (0-4 years)	1,180	1,250	1,300
Est. demand for children aged 5 years (8% of total)	100	110	110
<b>Est. average daily demand (children 0-5 years)</b>	<b>1,280</b>	<b>1,360</b>	<b>1,410</b>
<b>Existing centre-based childcare places</b>		<b>1,484</b>	<b>1,484</b>
Approved places		196	196
Subject development		121	121
<b>Existing, approved places and subject development</b>		<b>1,801</b>	<b>1,801</b>
<b>Estimated occupancy rate with subject development</b>		<b>76%</b>	<b>78%</b>

Source: ABS; Queensland ECEC Census; Child Care Subsidy Data; Colliers Urban Planning

## 5.2 Benefit Considerations

In terms the potential community benefits that are expected to arise from the development of a childcare centre at the Subject Site, the following points are noted:

- **Support female workforce participation.** A key obstacle for females returning to the workforce is access to affordable childcare, as previously stated by the Federal Government. Therefore, it is imperative to provide a range of childcare options to ensure females that wish to return to the workforce can easily access childcare facilities in the local area. The proposed childcare centre would contribute to supporting females in the local community return to the workforce by provided an additional option of formal childcare.
- **Cater to the growing childcare needs of the Catchment Area.** The population of the Catchment Area is projected to increase by 5,500 residents over the forecast period to 2041. Together with this population growth, the ongoing increase in childcare participation and attendance rates will increase the demand for childcare places in the local area.
- **Synergies with adjacent Centre zone.** Families are increasing becoming time poor, particularly as more females have the support to return to the workforce after having children. The location of the Subject Site adjacent to the existing Marsden District Centre provides convenience for families requiring formal childcare.
- **Increase choice and downward pressure on fees.** In any locality it is important to provide a range of childcare options for the community in order to offer a wide choice of facilities and to put downward pressure on fees. All

childcare centres offer different services and are different in size. Some childcare centres also cater to particular segments of the population. The proposed childcare centre would add to the choice of childcare centres in the local area, and would particularly provide a centre which is convenient to access on Chambers Flat Road, a key traffic route in the area.

- **Create local jobs.** The planned childcare centre would provide direct and ongoing employment opportunities for a number of staff at the centre. Based on the requirements of educators per children in Queensland, a 121-place childcare centre is expected to create at least approximately 20 direct ongoing jobs. Furthermore, additional temporary jobs would also be created during the construction phase of the project, in construction and related industries.

### 5.3 Impact Analysis

In addition to examining the need for the proposed childcare centre, one of the purposes of this report is to consider any potential adverse impacts which may occur due to the proposed development.

It is firstly emphasised that to maintain a healthy childcare sector, as demand for childcare places increases new centres need to be developed to ensure adequate choice for parents. The development of new centres also ensures that existing centres are encouraged to update programs and facilities to meet the expectations and preferences of parents.

Given the level of demand for childcare places in the Catchment Area is assessed to exceed the supply of the childcare centres provided in the local area, the impact on existing childcare centres in the surrounding area is expected to be minimal. This reflects the following key factors:

- The demand analysis in this report demonstrates sufficient demand for the proposed centre exists given the available market and supply of childcare places. Demand for long day care places in the area, and throughout the nation, is expected to increase in the future. This will be driven in part by the Federal Government providing additional funding for parents accessing formal childcare leading to an increase in the female participation rates in the workforce.
- The potential impacts from the proposed childcare centre on any one centre would be limited as the redistribution of demand would be spread across numerous childcare centres in the surrounding region. The proposed childcare centre would provide around 7.2% of the total existing and approved long day care places in the Catchment Area.
- Childcare centres in the surrounding area have an overall healthy occupancy rate which is at the higher end that is generally appropriate for an area. A high-level analysis of the occupancy rates of childcare centres reveals an occupancy rate of 78% for the five SA2s which encompass the Catchment Area.

In summary, the proposed childcare centre at the Subject Site is not expected to have any adverse impact on the ongoing viability of existing childcare centres in the surrounding area and would not delay the development of approved childcare centres in the Catchment Area. This reflects that there is sufficient market need to support the proposed childcare centre in addition to the existing and approved centres in the Catchment Area. Furthermore, the market need for long day care places in the area will continue to increase in the future driven by population growth and rising childcare participation rates.

It is also highlighted that given the scale and range of uses currently provided within the Marsden District Centre, the proposed development would not have any adverse implications for the centre and would not alter its role and function in the centre hierarchy.

### 5.4 Alternate Site Considerations

The Subject Sites is conveniently located on Chambers Flat Road, immediately adjacent to Marsden District Centre which provides a range of shopping facilities and other businesses.

A review of the Marsden District Centre reveals that the majority of the land within the Centre zone is developed and occupied. The only vacant land in the Centre zone forms part of the HomeCo. Marsden property, with a childcare centre already approved within the property.

No apparent vacant available sites within the Marsden District Centre, with frontage to Chambers Flat Road, have been identified which could accommodate a childcare centre.

## 6.0 Summary and Conclusion

This Chapter provides a summary of the key findings of the report and an assessment of net community benefit.

A 121-place childcare centre is proposed at 3/92 Chambers Flat Road, Waterford West. The Subject Site is conveniently accessible and located adjacent to Marsden District Centre. The Marsden District Centre provides a range of retail and other businesses and contains HomeCo. Marsden, a major shopping centre.

A Catchment Area has been defined for the proposed childcare centre which reflects its location on Chambers Flat Road. It extends some 2-2.5km around the Subject Site. The population of the Catchment Area is projected to increase from 35,810 at 2025 to 41,330 at 2036. The socio-demographic profile of the Catchment Area is reflective of younger family households who earn lower incomes and are more likely to rent compared with Greater Brisbane. The Catchment Area contains an above average proportion of residents aged 4 years and younger and a higher proportion of single parent families.

There are 15 existing childcare centres located in the Catchment Area providing between 60 and 151 places, while two childcare centres are approved in the area. The 17 centres will provide a total of 1,680 long day care places once the approved centres are developed, offering an average of around 100 places each. A 121-place childcare centre would fall within the range of places typically offered by childcare centres. In the local area four centres provide more than 121 places.

A review of the key demand factors, compared with the existing and approved supply of the childcare places in the Catchment Area, identifies a need for additional childcare places in the area. In particular, a market needs exists for a childcare centre with 121 places at the Subject Site. No other apparent sites within the Marsden District Centre with frontage to Chambers Flat Road have been identified which could accommodate a childcare centre.

The proposed childcare centre is assessed to not adversely impact existing childcare centres in the Catchment Area or delay the development of approved childcare centres in area. This primarily reflects that the demand for childcare places in the area will continue to increase, that there is the sufficient market to support the proposal as well as the existing and approved childcare centres in the Catchment Area.

Overall, the proposed childcare centre at the Subject Site would serve a demonstrated economic and community need for additional childcare places in the Catchment Area. It would cater to the needs of the local population and serve the increasing demand for centre-based childcare places in the area driven by the growing number of young families and increasing childcare participation rates. It would also provide an important community service by supporting female workforce participation as well increasing childcare choice for parents.

Based on the analysis provided in this report, and particularly that the positive economic and community benefits would offset any potential implications to existing childcare facilities, it is concluded that a net community benefit will result from the development of the proposed childcare centre at the Subject Site.



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