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EVIDENCE-BASED MARKET REPORT

STRATEGIQUE INTELLIGENCE BRIEFING · AUSTRALIA

Australian Childcare Market Report

A dated comparison of 4 selected childcare markets, built from stored competitor, demographic, rating, and review evidence.

4	40	40	59
selected suburbs	mapped businesses	ratings sampled	review snippets

Snapshot issued 31 October 2026. Source reports generated from 9 August 2026 to 9 August 2026.

WHY THIS REPORT EXISTS

The evidence trail behind this comparison

Childcare is about as local as a business gets. Parents generally choose a centre that fits a daily route between home and work. They are not choosing across a city. Drop-off and pick-up happen twice a day, often under time pressure, so a centre a few extra minutes out of the way loses ground to one that is convenient. As a result, the meaningful competitive set for any centre is the handful of operators within a short travel radius, not a state or national market.

The category also has unusually high switching costs once a family is enrolled. Children settle with particular educators, siblings follow, and waitlists can make moving difficult. In practice, this means competition is fought hardest at the point of first enrolment, and retention depends on consistency over time. That is why reliability and service quality, rather than price, tend to dominate parent commentary. The pooled review themes in this sample bear that out: service quality and reliability together account for 55 of the theme mentions, against 5 for price and value.

Supply-side structure matters as much as demand. Density shapes how hard an operator must work to fill places and how much room there is to differentiate. In this sample it ranges from Cottesloe's 6/100 to North Sydney's 71/100. Household income context also varies across the four suburbs, from $2,709/week in North Sydney to $3,351/week in Cottesloe (ABS Census 2021). That figure describes the area. It does not measure what families will pay for care, how much demand goes unmet, or what margins are achievable.

A side-by-side comparison guards against reading any single figure in isolation. Cottesloe's top score looks different once you note it rests on one mapped competitor, a population of 7,750 and no review evidence. Brighton's slightly lower score looks different once you note it carries the highest opportunity score in the sample alongside 15 competitors rated 4.4/5 on average. The value of this kind of comparison lies in those interactions.

EXECUTIVE SIGNAL

What the evidence shows

This report compares four Australian childcare markets: Cottesloe (WA), Brighton (VIC), North Sydney (NSW) and Bulimba (QLD). It uses Strategique Scores, mapped competitive density, ABS Census

2021 demographics and themes drawn from Google reviews. The four suburbs are illustrative evidence for how a suburb-by-suburb comparison works. They are not a shortlist of places to open.

The headline Strategique Scores sit within a tight six-point band. Cottesloe leads on 75, followed by Brighton on 73, Bulimba on 72 and North Sydney on 69, against a sample average of about 72. The underlying structures behind those similar scores are very different. Cottesloe has one mapped competitor and a density score of 6/100, while North Sydney has 21 competitors and a density score of 71/100. The sample average density is 45.

The separate opportunity score ranks the suburbs in a different order. Brighton leads on 94 and North Sydney follows on 88, while Cottesloe and Bulimba both sit on 77. The two highest-density markets therefore post the highest opportunity readings. Read on its own, no single metric tells the full story.

Across the 59 review snippets available, service quality (31 mentions) and reliability (24) dominate what parents talk about. Price and value draws only 5 mentions. Service-quality mention volumes are flat month-on-month in Brighton, North Sydney and Bulimba. Cottesloe contributes no review data at all, which is itself a material gap in the evidence for that market.

THE COMPETITIVE LANDSCAPE

How the evidence interacts across this sample

Start with how tightly the Strategique Scores cluster. Only six points separate Cottesloe (75) from North Sydney (69), while density ranges across 65 points and competitor counts range from 1 to 21. This means very different competitive structures can produce similar composite scores. An operator who stops at the headline number misses the strategic content. Beneath similar totals, the four suburbs fall into three distinct archetypes, and each rewards a different approach.

The first archetype is the high-density, high-opportunity market, illustrated by Brighton and North Sydney. They hold the two highest opportunity scores in the sample (94 and 88) and the two highest density scores (68 and 71). Their competitor bases differ sharply in quality, though. Brighton's 15 competitors average 4.4/5, the highest rating in the sample. North Sydney's 21 competitors average 3.1/5, the lowest among the three suburbs with rating data. Possible interpretation: in Brighton a newcomer would be measured against a well-regarded incumbent set, so the entry bar sits on quality and execution. In North Sydney the lower average rating may point to dissatisfaction that a reliably run centre could address. Hypothesis to test: whether North Sydney's rating gap reflects service problems parents would switch away from, or simply reflects a different population, since its 12,441 residents work out to roughly 590 per mapped competitor against roughly 1,520 in Brighton (simple ratios derived from the figures above). The linked competitive-forces breakdowns for both suburbs quantify rivalry and buyer power further.

The second archetype is the moderate-density middle ground, illustrated by Bulimba. Its density of 35/100 sits ten points below the sample average of 45. Its three competitors average 4.0/5, second only to Brighton. Its Strategique Score of 72 is within one point of Brighton's despite a population of 7,407, the smallest in the sample. Possible interpretation: in this kind of market there are few incumbents, but they are well rated, so competition is less about crowding and more about matching an established standard with a small catchment. An operator here would want to test whether demand from a population of this size supports another centre's occupancy targets before relying on the lower density reading.

The third archetype is the low-density, thin-evidence market, illustrated by Cottesloe. It leads the sample on Strategique Score (75), has the lowest density by a wide margin (6/100 versus Bulimba's 35 and the sample average of 45), and records the highest median household income ($3,351/week, ABS Census 2021, ahead of Bulimba's $2,868). It also has one mapped competitor, no average rating, and zero review snippets. This makes it the market where the numbers are most favourable on paper and least verified by customer evidence. Low mapped density does not establish unmet demand or room for another operator. It may equally reflect a small catchment of 7,750 residents or families who use care outside the suburb. Higher income context does not establish willingness to pay premium fees either. The linked opportunity report and SWOT for Cottesloe are the place to see how these factors are weighed. Any positioning hypothesis would need local fee checks and parent research before it could be relied on.

The review-theme data shows where incumbents are being judged. Of 59 pooled snippets, service quality is mentioned 31 times and reliability 24 times. Communication follows with 12 mentions, price and value with 5, and responsiveness with 1. Parents in these markets are talking overwhelmingly about the care itself and whether the centre is dependable, far more than about cost. Hypothesis to test: a centre differentiating on consistency and parent communication may find more traction than one competing on fees, though the low price-and-value count could also mean fee frustration is under-expressed in reviews rather than absent.

The trend signals show a stable picture rather than a shifting one. Service-quality mentions are holding at around 15 in Brighton, 12 in North Sydney and 4 in Bulimba, each consistent with its trailing two-month average. No market in this sample shows parent attention moving sharply for or against incumbents on service quality. For an operator, flat trends mean no window is opening and no deterioration has been flagged. Competitive position in these markets is being held, not won or lost, at the moment. Note that the higher counts in Brighton and North Sydney partly reflect their larger review samples (25 snippets each

against Bulimba's 9).

01 / EVIDENCE TABLE

Selected suburb comparison

Each card mirrors the interactive report's evidence table. Open the linked market opportunity report for the full local breakdown.

Cottesloe, WA

AFFLUENT COASTAL

75
Strategique Score / 100

Density 6/100 · 1 mapped competitors · 0.0/5 avg rating (1) · 0 review snippets
Population 7,750 · Median household income $3,351/wk · Data updated 9 August 2026

Brighton, VIC

HIGH COMPETITOR DENSITY

73
Strategique Score / 100

Density 68/100 · 15 mapped competitors · 4.4/5 avg rating (15) · 25 review snippets
Population 22,758 · Median household income $2,718/wk · Data updated 9 August 2026

North Sydney, NSW

DENSE METRO

69
Strategique Score / 100

Density 71/100 · 21 mapped competitors · 3.1/5 avg rating (21) · 25 review snippets
Population 12,441 · Median household income $2,709/wk · Data updated 9 August 2026

Bulimba, QLD

INNER-CITY PREMIUM

72
Strategique Score / 100

Density 35/100 · 3 mapped competitors · 4.0/5 avg rating (3) · 9 review snippets
Population 7,407 · Median household income $2,868/wk · Data updated 9 August 2026

02 / CUSTOMER EVIDENCE

What appears in available review snippets

Transparent mention counts from the stored snippets, not sentiment scores or a survey of all customers.

Service quality 31 mentions

Reliability 24 mentions

Communication 12 mentions

Price and value 5 mentions

Responsiveness 1 mentions

TREND SIGNALS MONTH OVER MONTH

- "Service quality" mentions in Brighton have held steady at around 15 this month, consistent with the trailing 2-month average.
- "Service quality" mentions in North Sydney have held steady at around 12 this month, consistent with the trailing 2-month average.
- "Service quality" mentions in Bulimba have held steady at around 4 this month, consistent with the trailing 2-month average.

03 / OPPORTUNITY SIGNALS

Location signals worth investigating

RELATIVE MARKET HEADROOM

Cottesloe

Cottesloe leads this comparison with a Strategique Score™ of 75, 2 points ahead of Brighton (73). Treat this as a starting point for a location-specific score, not a demand forecast.

LOWER MAPPED COMPETITIVE DENSITY

Cottesloe

Cottesloe has the lowest competitive density in this comparison at 6/100, against a sample average of 45 and Bulimba's 35/100, based on the businesses mapped for each market.

HIGHER HOUSEHOLD-INCOME CONTEXT

Cottesloe

Cottesloe records the highest median household income in this comparison at $3,351/week, ahead of Bulimba at $2,868/week. This is context only; it does not establish spend, foot traffic, or product fit.

STRONGEST CUSTOMER-RATING SIGNAL

Brighton

Brighton carries the highest average competitor rating in this comparison at 4.4/5 across 15 rated listings, ahead of Bulimba at 4.0/5. High ratings can reflect either a well-served market or a high bar new entrants would need to clear -- read it alongside density, not on its own.

WHO SHOWS UP IN THESE MARKETS

Family and household regulars, on average across this sample

The pooled ABS Census 2021 persona for these markets, labelled Family and household regulars, points to a settled, educated population. The median age is 43, 44% hold a bachelor degree or higher, and family households make up 67% of households. Single-person households account for 33% and 36% of residents have never married, so the catchments are not exclusively family-oriented. Families with young children are one segment within a broader mix. The pooled median household income is $2,912/week. As with all demographic figures here, this is area context and not a measure of childcare spend.

Employment shows 19% in professional roles and 14% in healthcare. Possible interpretation: healthcare work often involves shift patterns, which may make reliable hours and predictable care matter to a share of families. That is a hypothesis to test locally, not a finding from this data.

The review themes complete the picture. Among the 59 pooled snippets, parents mention service quality 31 times, reliability 24 times and communication 12 times, compared with 5 mentions of price and value. On this evidence, the families showing up in these markets judge centres primarily on the quality and dependability of care and on how well they are kept informed, rather than on cost.

43 yrs	44%	33%	67%	19%	14%	36%	$2,912/wk
Median age	Bachelor degree+	Single-person households	Family households	Professional employment	Healthcare employment	Never married	Median household income

Derived from ABS Census DataPack fields (2021) attached to each stored market report, averaged across the curated sample. This is a demand-context signal, not a customer survey.

04 / RECOMMENDED NEXT MOVE

What to do with this, in order

1. **Run your own suburb through strategique**
   The sampled suburbs show how the comparison works, not where to go. Run your own suburb through strategique to get its Strategique Score, density, competitor ratings, Census 2021 context and review themes, benchmarked the same way.
2. **Look past the headline score**
   In this sample a six-point score spread hides a 65-point density range. When you review your own suburb's results, read score, density, competitor count and ratings together to identify which archetype your market resembles.
3. **Check how much review evidence sits behind your market**
   Cottesloe's zero review snippets show how thin evidence can sit behind favourable figures. When you run your own suburb, note how many reviews underpin its themes, and fill any gaps with direct parent conversations.
4. **Turn demographic context into testable hypotheses**
   Treat your suburb's income and household figures as context only. Convert any pricing or positioning idea into a hypothesis, and validate it with local fee checks, waitlist enquiries and your own operating costs before committing.

FREQUENTLY ASKED

Common questions on childcare competition and strategy

If a suburb has very few competitors, does that mean there is room for a new centre?

Not on its own. Cottesloe has one mapped competitor and a density score of 6/100, far below the sample average of 45, but it also has a population of 7,750 and no review evidence. Low mapped supply can reflect a small catchment or families using care elsewhere. Treat low density as a hypothesis to test against local enrolment and waitlist checks, not as proof of headroom.

Why would a high-density suburb score well on opportunity?

In this sample, Brighton (density 68) and North Sydney (density 71) post the two highest opportunity scores, 94 and 88. Dense supply often sits where demand is concentrated, so heavy competition and strong demand signals can coexist. The strategic question then shifts from whether there is demand to whether you can out-execute incumbents.

What does a high average competitor rating mean for a new entrant?

It cuts both ways. Brighton's 4.4/5 average across 15 rated listings, the highest in the sample, may indicate a well-served market or a high quality bar a newcomer must clear from day one. It should be read alongside density and the specific themes in local reviews.

Is a lower average rating a sign of opportunity?

Possibly, but it needs testing. North Sydney's 3.1/5 average is the lowest of the three suburbs with ratings, and it sits alongside 21 competitors. The gap may reflect service shortfalls parents would switch over, or it may reflect review patterns that do not translate into switching. The linked SWOT and competitive-forces breakdown for North Sydney help frame that question.

Can I charge higher fees in a higher-income suburb?

Household income is area context, not a measure of willingness to pay. Cottesloe's $3,351/week median (ABS Census 2021) is the highest in the sample, but that does not establish what families there will pay for care. Any premium pricing position is a hypothesis to test with local fee checks, parent research and your own cost base.

What do parents actually care about most, based on reviews?

Across 59 pooled review snippets, service quality leads with 31 mentions, followed by reliability (24) and communication (12). Price and value draws only 5 mentions and responsiveness 1. In this sample, the care itself and dependability dominate what parents write about.

Are customer expectations shifting in these markets?

Not on the evidence available. Service-quality mentions are flat in Brighton (around 15), North Sydney (around 12) and Bulimba (around 4), each consistent with its trailing two-month average. Cottesloe has no review data, so no trend can be read there.

05 / EVIDENCE NOTES

Methodology and sources

- This report deliberately curates one childcare market per selected region -- distinct trading archetypes rather than whichever reports happened to run most recently -- so the comparison reflects genuinely different trading conditions.
- Competition and rating measures are read from the stored Google Places competitor records attached to each linked market report.
- Population and household-income context is read from the stored ABS demographic fields attached to each linked market report.
- Customer review snippets for the curated markets are fetched live from Google Places for their top competitors when not already stored, then counted for topic mentions each month to build a trend history. Trend statements compare this month's mention counts to the trailing average, not sentiment scores or a representative survey of all customers.
- The Strategique Score™ and its components are shown exactly as stored at report generation time; this report does not recalculate them.

SOURCES

- strategique published childcare opportunity reports (stored market report snapshots)
- Google Places competitor listings, ratings, and review snippets for the top competitors in each curated market
- Australian Bureau of Statistics demographic fields captured in those reports

READ THIS WITH CARE

What this report cannot tell you

- This is a curated sample of 4 markets, not a national census of childcare or customers.
- Google listings and reviews can be incomplete, delayed, or categorised inconsistently.
- Review snippets only cover the top few competitors per market by review volume; missing themes do not mean customers did not discuss them.
- Scores and demographics support early location research only. They do not predict revenue, foot traffic, rent, licensing, staffing, or business success.

Continue the research in strategique

Open the interactive report to continue into each linked opportunity report, Strategique Score, SWOT, and Porter's Five Forces.