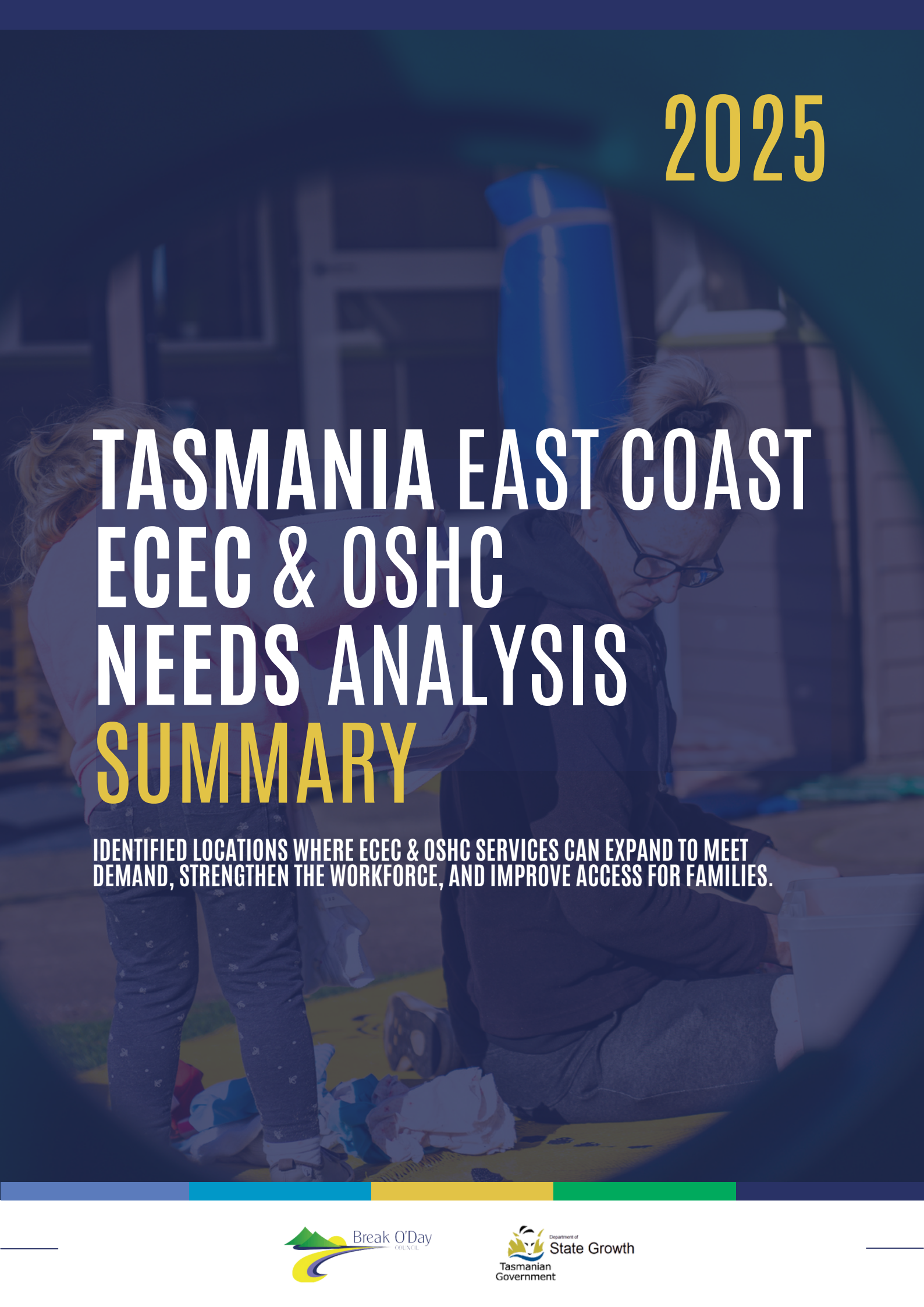
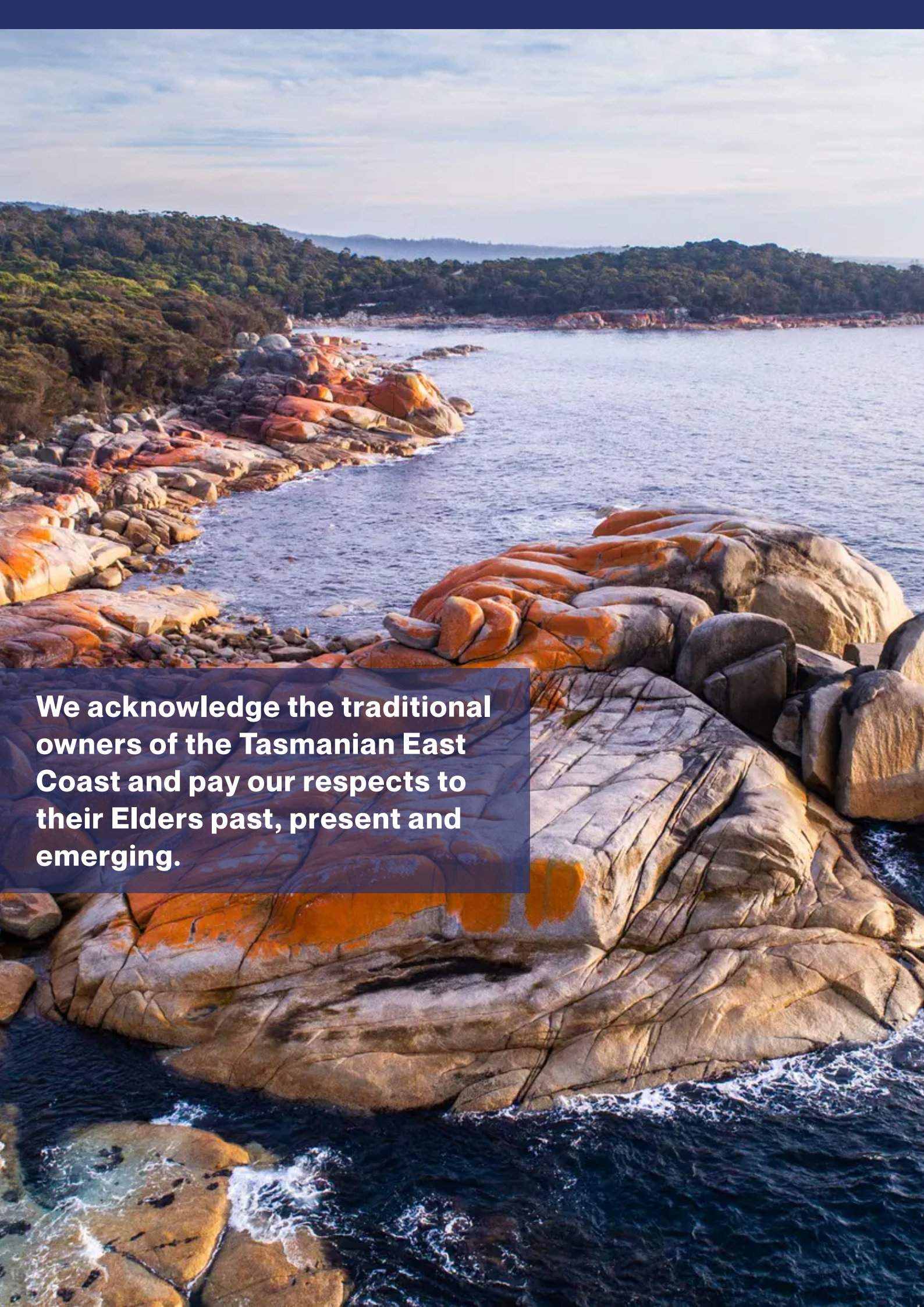


A background image showing a woman with glasses and a child in a playroom. The woman is kneeling on a yellow rug, and the child is standing next to her. There are various toys and furniture in the background.

2025

TASMANIA EAST COAST ECEC & OSHC NEEDS ANALYSIS SUMMARY

IDENTIFIED LOCATIONS WHERE ECEC & OSHC SERVICES CAN EXPAND TO MEET DEMAND, STRENGTHEN THE WORKFORCE, AND IMPROVE ACCESS FOR FAMILIES.



We acknowledge the traditional owners of the Tasmanian East Coast and pay our respects to their Elders past, present and emerging.

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Acknowledgments

Prepared for the Eastern Strategic Regional Partnership (ESRP)

Commissioned by Break O’Day Council | Supported by Glamorgan Spring Bay Council,
Department for Education, Children & Young People (DECYP) | Funded and supported by
the Tasmania Government - Department of State Growth

Prepared and delivered by NMC - October 2025



Introduction



This Needs Analysis charts the path to stronger, more accessible ECEC & OSHC services across Tasmania's East Coast - supporting families, educators and community growth.

Drawing on demographic data, workforce insights and local engagement, this analysis **identifies where investment will have the greatest impact** - improving access, strengthening the workforce and enhancing liveability across the East Coast.

The project aligns with Tasmania's Population Policy (2024) and Early Learning for Three-Year-Olds (EL3) initiative, guiding future planning for a sustainable, community-led ECEC & OSHC network.



Apr → Sep
Timeline - 2025



Goal: Guide strategic expansion of early years services on the East Coast



Enrolment and workforce modelling and projections



5 Locations
Analysed for expansion

Project Phases

Part A - St Marys:

Tested local models for service delivery and identified the most viable approach for a new ECEC & OSHC facility.

Part B - East Coast:

Expanded the analysis region-wide to assess supply, demand and workforce capacity across key townships.

Methodology



The Needs Analysis combined qualitative and quantitative research to capture both the data and the daily experience of delivering ECEC & OSHC services on the ground. This approach ensured that the findings reflect the realities of local communities and sector expertise across the East Coast.

Engagement Approach



38

Consultations



5

Priority Townships



7

Core Datasets
Reviewed



NMC utilised diverse data sources, key to establishing demographic analysis, workforce forecasting and service modelling. These included:

- Council strategies
- Tasmanian Government policy papers
- Economy ID and ABS 2021 data
- Tasmania PHN health context
- Dr Lisa Denny's Future Thinking Demographic Change Report
- Provider enrolment & workforce datasets from Thrive Group, Lady Gowrie Tasmania & Fingal Valley Neighbourhood House.

East Coast ECEC & OSHC Summit 2025



The East Coast ECEC & OSHC Summit, held in August 2025 at Swansea Town Hall, united over 30 sector and community partners to shape a shared vision. The summit reaffirmed that progress will be driven by people: skilled educators, active councils and strong partnerships working together to create a sustainable, connected regional early-years system.

30+
Sector
Participants



4
Key Themes



**Infrastructure
& Planning**



**Capacity &
Access**



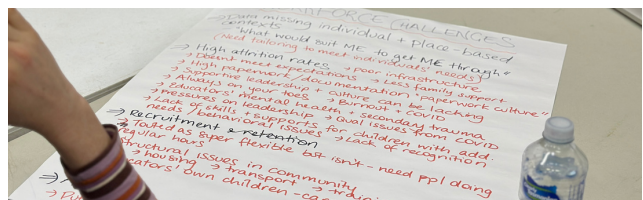
**Delivery &
Integration**



**Workforce
& Training**

Key Outcome

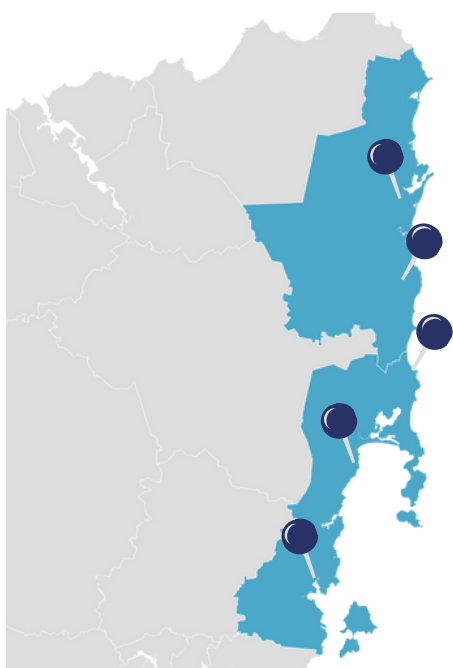
Participants aligned that collective regional action - through flexible builds, local training, and coordinated planning- is key to securing growth across the East Coast.



Demographics



The East Coast's communities are experiencing steady population change, bringing new opportunities to design flexible, place-based early-years services that keep families connected and children learning close to home.



Break O'Day and Glamorgan Spring Bay have similar population sizes but distinct demographic trends.

- **Break O'Day** is ageing overall, both inland and along the coast, with Scamander as the key growth exception attracting younger families from Hobart and Launceston.
- **Glamorgan Spring Bay** is experiencing tourism-driven growth and emerging cultural diversity, particularly in Bicheno, Swansea and Triabunna.

Both areas face ageing populations and low birth rates, but migration-led growth presents clear opportunities to expand ECEC & OSHC access in growing townships while maintaining viability in smaller communities.

Category	Break O'Day Council	Glamorgan Spring Bay Council
Population (2021)	6,770 People	5,012 People
Median Age	56 Years	57 Years
Aged 0-4 Years	3.8%	3.1%
Aged 65+ Years	31.7%	34.1%
Unemployment Rate	7.4%	4.8%
Primary Growth Areas	St Helens, Scamander	Swansea, Bicheno, Triabunna
Main Employment Sectors	Healthcare & Social Assistance (14.6%), Trades (14.9%)	Accommodation & Food Services (16.1%), Retail (13.3%)

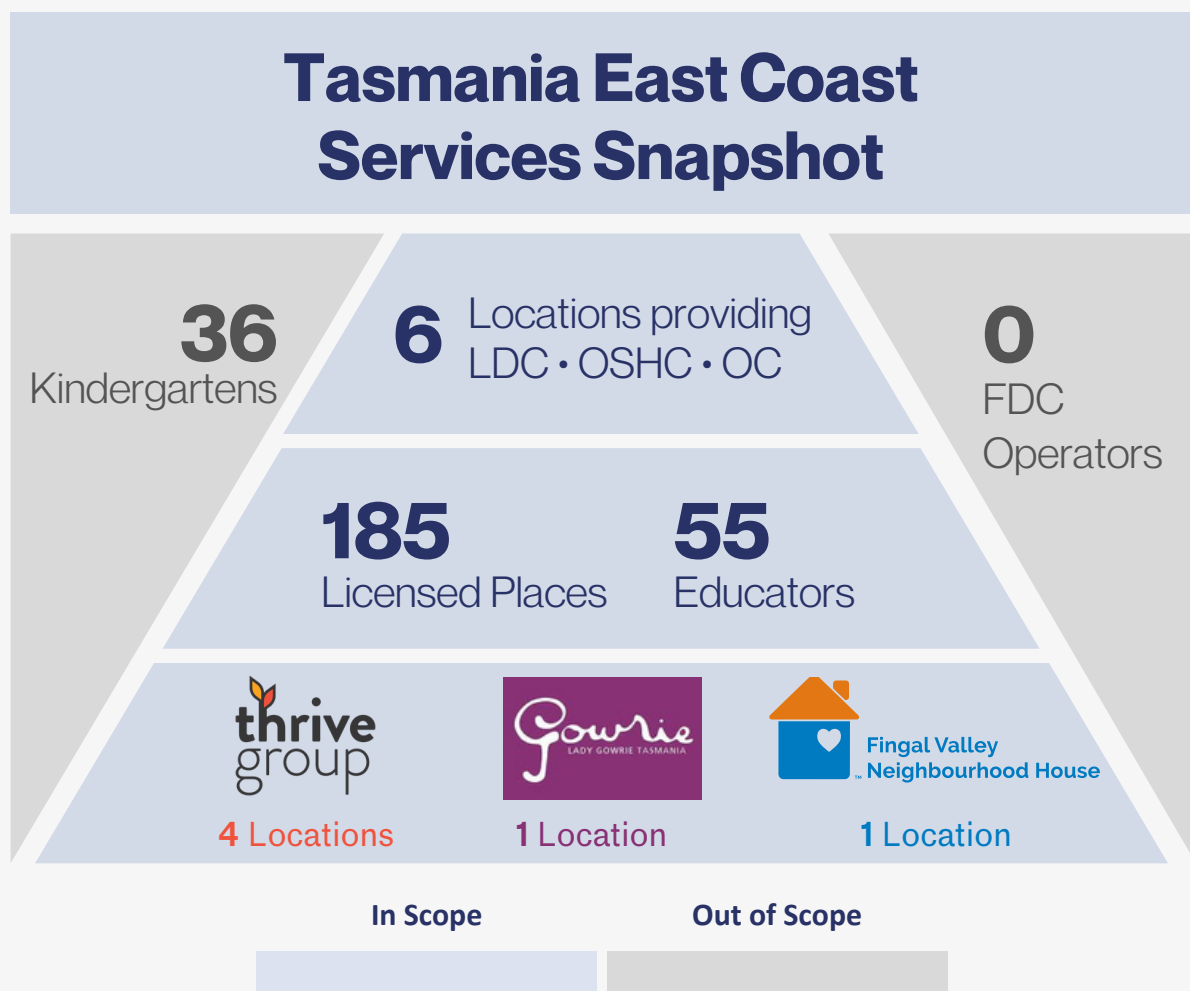
Sources: ABS Census 2021; TasPOP 2024; Dr Lisa Denny "Future Thinking: Demographic Change in Break O'Day"; Department of Treasury & Finance Tasmania.

Services Analysis



ECEC & OSHC services across the East Coast are largely community-driven and not-for-profit. Their presence demonstrates the sector's resilience and commitment to local children, even in areas where service viability is challenged by distance, infrastructure and workforce constraints.

The East Coast's early-years network is delivered by three main providers - Thrive Group, Lady Gowrie Tasmania, and Fingal Valley Neighbourhood House - with Thrive Group the largest operator. No Family Day Care services currently operate in the region, as low population density and limited viability make home-based care unsustainable.



Enrolment Geography



**20-40
mins**

**Average Family
Travel Time**

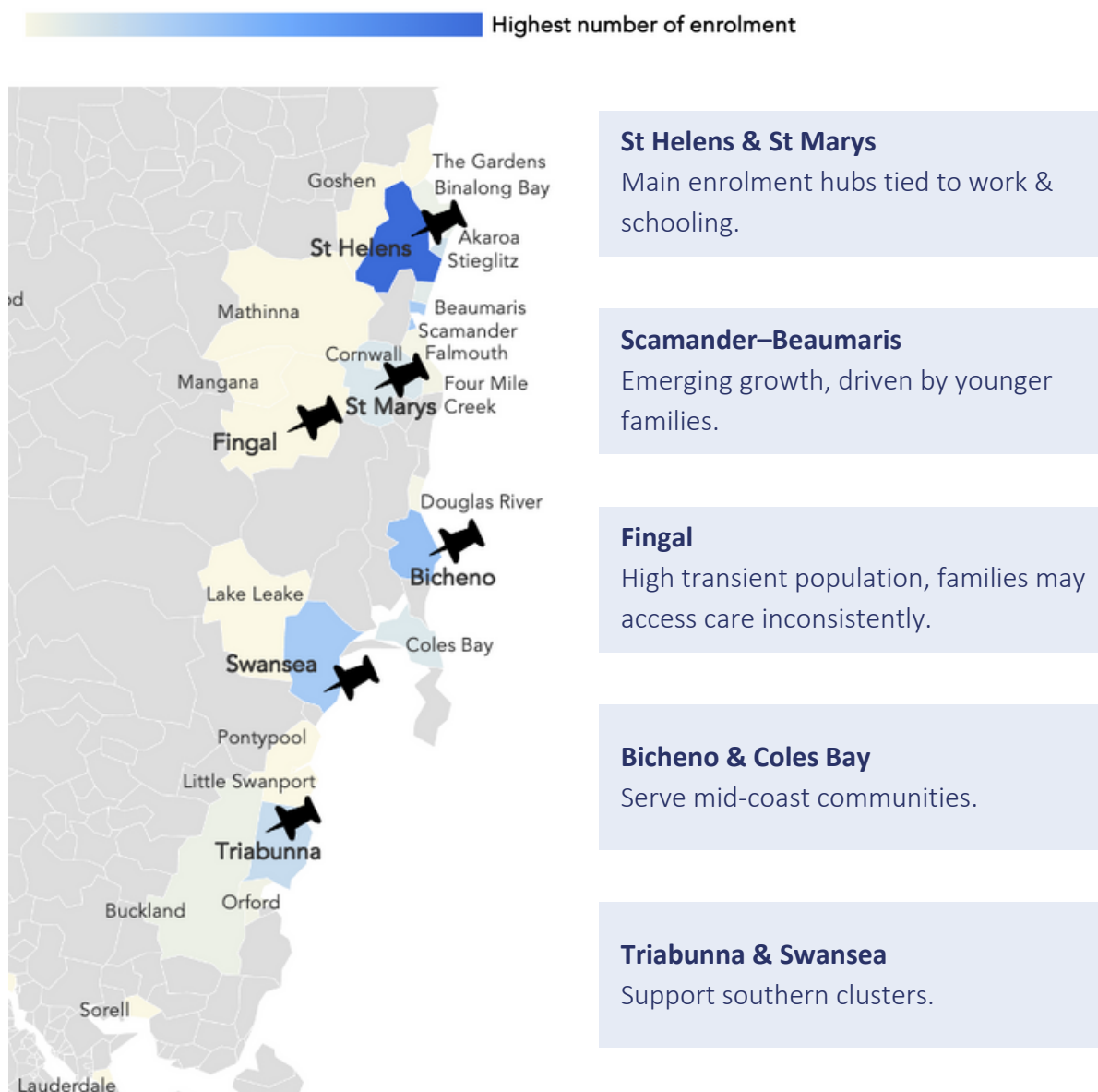
The limited number of ECEC & OSHC centres across the East Coast means each serves a wide catchment, requiring many families to travel significant distances.

280

Enrolments (2025)

High enrolments show strong family demand, but limited centres and places mean services are operating near capacity across the East Coast.

Source: Postcode & enrolment data from Thrive Group, Lady Gowrie Tasmania & Fingal Valley Neighbourhood House for all centres across East Coast



Supply & Demand



As families continue to move to the East Coast, the region's ECEC & OSHC services face rising demand - a positive indicator of growth and confidence in local communities. Expanding capacity now will ensure the region can meet future needs sustainably.

Analysis to 2029 shows an estimated shortfall of around 110 places below the optimal number of licensed places across the region. St Helens has the largest gap (40 places), followed by St Marys (19), Swansea (18), Triabunna (18) and Bicheno (17).

With steady population growth, most centres run at or near full utilisation. Targeted investment in school-co-located ECEC & OSHC expansions will create accessible places, reduce travel time and support parents' participation in the workforce.



110+

Places needed
by **2029**



St Helens

Largest shortfall

Town	Licensed Places	Optimal Places (2029)	Shortfall
St Helens	66	106	40
St Marys	10	29	19
Bicheno	32	49	17
Swansea	28	46	18
Triabunna	20	38	18
Total			110

Optimal Licensed Places = Children require a minimum of 4 days per week of services

Current Workforce



The East Coast's ECEC & OSHC workforce is small but deeply local - driven by connection, resilience and community pride.

Educators form the backbone of early learning across the East Coast. Most live within their local towns, creating strong ties between services, families and community life. This local strength, however, comes with challenges — a small casual pool, limited qualification diversity and high workloads that mirror national sector pressures.

Despite these constraints, the East Coast workforce continues to deliver high-quality programs and lasting relationships that anchor families in their communities. Supporting, training and retaining these educators is key to expanding and sustaining ECEC & OSHC services across the region.



55 educators
across the region



29 Certificate III
21 Diploma
2 Bachelor



<15 graduates
per annum (2019-23)



Workforce Geography



17 Minutes
average educator
commute time



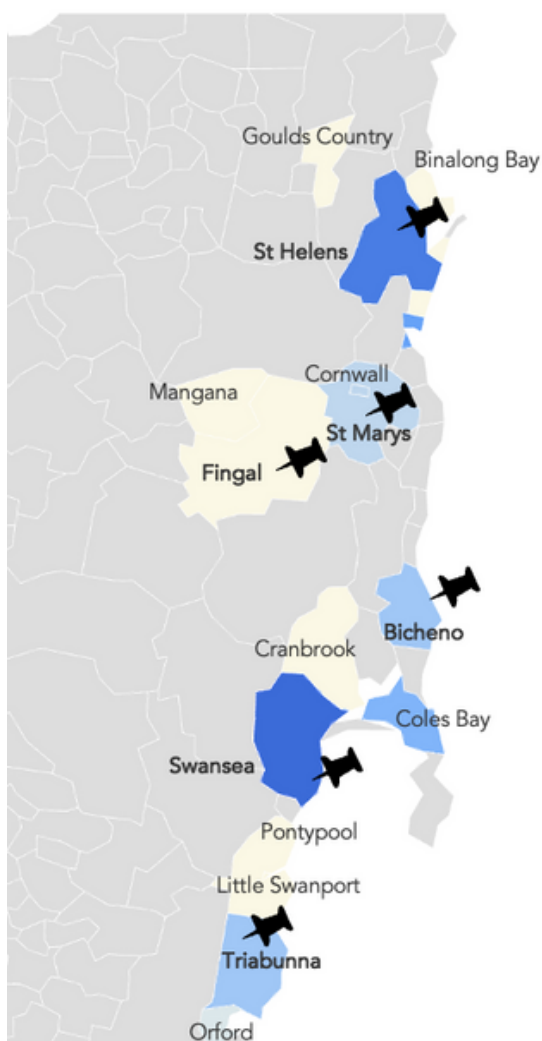
76%
of staff travel under
20 minutes for work

East Coast roads are long, winding and lack public transport. Centres rely on local staff because distance and travel conditions limit workforce mobility and access to casual relief.

Source: Workforce data from Thrive Group, Lady Gowrie Tasmania & Fingal Valley Neighbourhood House for all centres across East Coast



Highest number of workforce



Local Staff - Most centres rely on local educators, as long distances and limited transport make commuting difficult. This builds strong community ties but leaves services with small casual pools and few options to share staff.

Reliance on neighbouring towns - The Bichenno service relies on educators from Coles Bay, 38 km away, where no ECEC or OSHC service exists - showing how regional centres depend on nearby communities to maintain staffing.

Online Training - With limited local qualification options, many educators study online. While accessible, this can reduce hands-on learning and mentoring that strengthen workforce capability.

Workforce Strategies



Six Workforce Strategies to address the **30 additional educators needed by 2029.**

Each strategy combines **global research, regional project experience, and insights from Jobs Tasmania and State Growth** to deliver practical, place-based solutions that strengthen recruitment, retention and professional growth across the East Coast ECEC & OSHC workforce.



WORKFORCE PIPELINES

Expand school traineeships and subsidised Cert III programs; focus on local coordination and delivery



FOCUS ON LOCAL RECRUITMENT

Prioritise hiring within the township to reduce travel related attrition



LIFE-STAGE ROLES

Offer flexible rostering and lighter roles for parents and older educators



INDUCTION & MENTORING

Provide structured onboarding, realistic job previews and peer support



FLEXIBLE SERVICE MODELS

Use multi-age “Family Grouping” to ease staffing pressures in small teams



RETENTION BARRIERS

Partner on affordable housing and recognise long service and contribution

Regional Summary & Expansion Recommendations



Priority towns are identified as key East Coast hubs with the highest unmet ECEC & OSHC demand and strong potential for school-co-located expansion.

The collaborative output from co-design workshops involving ECEC providers, Registered Training Organisations (RTOs)/Universities and Council resulted in strategies aimed at improving workforce attraction, recruitment, retention, and skills and learning.



St Marys

Build a school co-located ECEC & OSHC hub serving 11 localities.

+19

Licensed Places

+6

Educators

St Helens

New school-adjacent centre to serve regional catchment.

+40

Licensed Places

+10

Educators

Bicheno

Extend school co-located Little Penguins site to meet seasonal demand.

+17

Licensed Places

+2

Educators

Swansea

Primary School adjacent to increase OSHC capacity.

+18

Licensed Places

+3

Educators

Triabunna

Maintain service continuity and meet near-capacity demand.

+18

Licensed Places

+3

Educators

ACKNOWLEDGEMENTS

Break O’Day Council would like to thank the Tasmanian State Government, including the Department of State Growth and the Department for Education, Children and Young People, along with Glamorgan Spring Bay Council, Thrive Group, Lady Gowrie Tasmania, and Fingal Valley Neighbourhood House for their valued contributions to this report.

We also thank the many educators, service providers and community partners who participated in consultations and the East Coast ECEC & OSHC Summit 2025.

Finally, we acknowledge the work of Ninety Mile Consulting, who supported the concept development, analysis and coordination of this report.

ACRONYMS

BODC	Break O’Day Council
GSBC	Glamorgan-Spring Bay Council
DECYP	Department for Education, Children and Young People
ECEC	Early Childhood Education and Care
EC	Education and Care
OSHC	Outside School Hours Care
FDC	Family Day Care
OC	Occasional Care
LDC	Long Day Care
PHN	Public Health Network

Contact

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The full version of the Needs
Analysis can be found via Break
O’Day Council’s website [here](#)