Retail & Commercial Sectors Needs Assessment

Final Report

June 2013

ECONOMIC ASSOCIATES

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Final Report

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1 INTRODUCTION

1.1 Project Background & Purpose of Study

Moreton Bay Regional Council as one of South East Queensland's (SEQ's) 'urban-ring' councils, has a key role in accommodating future urban growth in SEQ. Management of this growth is necessary to mitigate the challenges caused by urban sprawl, such as high levels of commuting, the need for additional transport capacity, significant expenditure leakage, and low levels of employment and economic containment.

Identifying acceptable and sustainable carrying capacity in the Moreton Bay Region together with the economic, social and physical infrastructure necessary to support the region's communities, is an essential element to future growth management.

The complex and diverse range of issues related to the management of urban growth and infrastructure delivery is being addressed at both the local and state (regional) level, but this project in particular has the opportunity to deliver on fundamental economic objectives, such as sustainability and diversity of employment opportunities and improved employment self-containment.

The South East Queensland's Regional Plan Desired Regional Outcome (DRO) 9 seeks to plan for employment to support a strong, resilient and diversified economy that grows prosperity in the region by using the regions' competitive advantages to deliver exports, investment and sustainable and accessible jobs.

The Moreton Bay Region has experienced strong population growth over recent years, outperforming SEQ and Queensland. While population growth is expected to moderate over the next twenty years, existing issues within the region relating to strong population growth are expected to remain problematic in the absence of proactive solutions. Given the challenges of growth, it is important to plan for accessible employment opportunities with the Moreton Bay Region.

Employment and business accessibility has many aspects, including:

- The ability for employers to reach workers and vice versa;
- The means by which that workers and consumers utilise to access businesses;
- The rights of businesses to conduct their business economically and sustainability;
- The rights of workers to be employed in environments and businesses that meet their values and expectations; and
- The means by which businesses can access customer and supplier markets, etc.

The delivery of a sustainable centres hierarchy to support the commercial and retail sectors within the Moreton Bay Region can also be interpreted as offering an accessible business climate. An important task for strategy development then is to identify relevant economic and market, environmental, infrastructure and planning constraints to retail and commercial business development and opportunity. Hence, this present study is an important opportunity to investigate and embrace sustainable centres that are accessible to workers and consumers, serviced by infrastructure, reflective of evolving tenant needs and expectations and that add value to the social, economic and environmental framework.

The purpose of this study is to develop a sustainable centres hierarchy to support retail and commercial activity within the Moreton Bay Region.

1.2 Report Structure

The report is structured as follows:

- Chapter 1: *Introduction*: Outlines the project background and the purpose of this study.
- Chapter 2: *Socio Economic Overview of the Moreton Bay Region:* Provides an overview of the demographic characteristics, population projections and labour force characteristics of the planning areas benchmarked to Moreton Bay Regional Council (MBRC), South East Queensland (SEQ) and Queensland. The chapter also provides an overview of the recent development approvals within Moreton Bay Regional Council.
- Chapter 3: *Key Policy and Planning Issues*: Summarises the key strategic and statutory planning issues in terms of: statutory compliance / integrity; statutory alignment; composition; consistency; complexity; and currency.
- Chapter 4: *Retail, Commercial and Centre Trends*: Outlines the retail, commercial and centres trends including: types of shopping trips; types of shoppers; types of retail centres; trends in retail development; commercial office trends; in-centre residential trends; and planning policy trends.
- Chapter 5: *Centres Network and Hierarchy*: Identifies the existing centres network with Moreton Bay Regional Council and the metrics for principal and major centres. The chapter also recommends a centres hierarchy for Moreton Bay Regional Council looking forward.
- Chapter 6: *Retail and Commercial Catchment Definition*: Defines retail and commercial catchment boundaries based on the existing centres network and additional factors and provides population projections for the defined catchments.
- Chapter7: *Projected Retail Floor Space Demand*: Estimates retail floor space demand by catchment to 2031 and categorises the catchments into low, moderate and high need.
- Chapter 8: *Projected Commercial Floor Space Demand*: Estimates commercial floor space demand by catchment to 2031 and categorises the catchments into low, moderate and high need.
- Chapter 9: *Retail and Commercial Catchment Summary:* Estimates floor space demand by centre for each of the catchments and provides an overview of the development approvals within each catchment.
- Chapter 10: *Recommendations and Strategy*: The chapter summarises the planning and implementation of recommendations for each catchment.
- Chapter 11: References
- Appendix A: Literature review of key policy and planning issues
- Appendix B: Detailed retail expenditure tables
- Appendix C: Detailed supportable floor space table
- Appendix D: Development approvals

1.3 Interpretation

This report represents a strategic assessment of retail and commercial sector activity within the Moreton Bay Region. It includes a range of projections over a twenty year horizon which form the basis of a series of strategic centre recommendations. The delivery of new centres should be accompanied by appropriate small area analyses at the time of delivery to account for micro-level conditions and / or change in the anticipated outlook.

2 SOCIO ECONOMIC OVERVIEW OF THE MORETON BAY REGION DISTRICTS

2.1 Moreton Bay Regional Council Draft Strategic Framework Districts

The planning areas for this study were derived based on the place type planning areas presented in the Moreton Bay Regional Council Draft Strategic Framework, using both statistical local area (SLA) and statistical area level 1 (SA1) boundaries. Seven catchments were defined for Moreton Bay Regional Council, these being:

- Strathpine City;
- North Lakes;
- Redcliffe;
- Caboolture City;
- Bribie & Coastal Villages;
- North West Rural; and
- South West Rural.

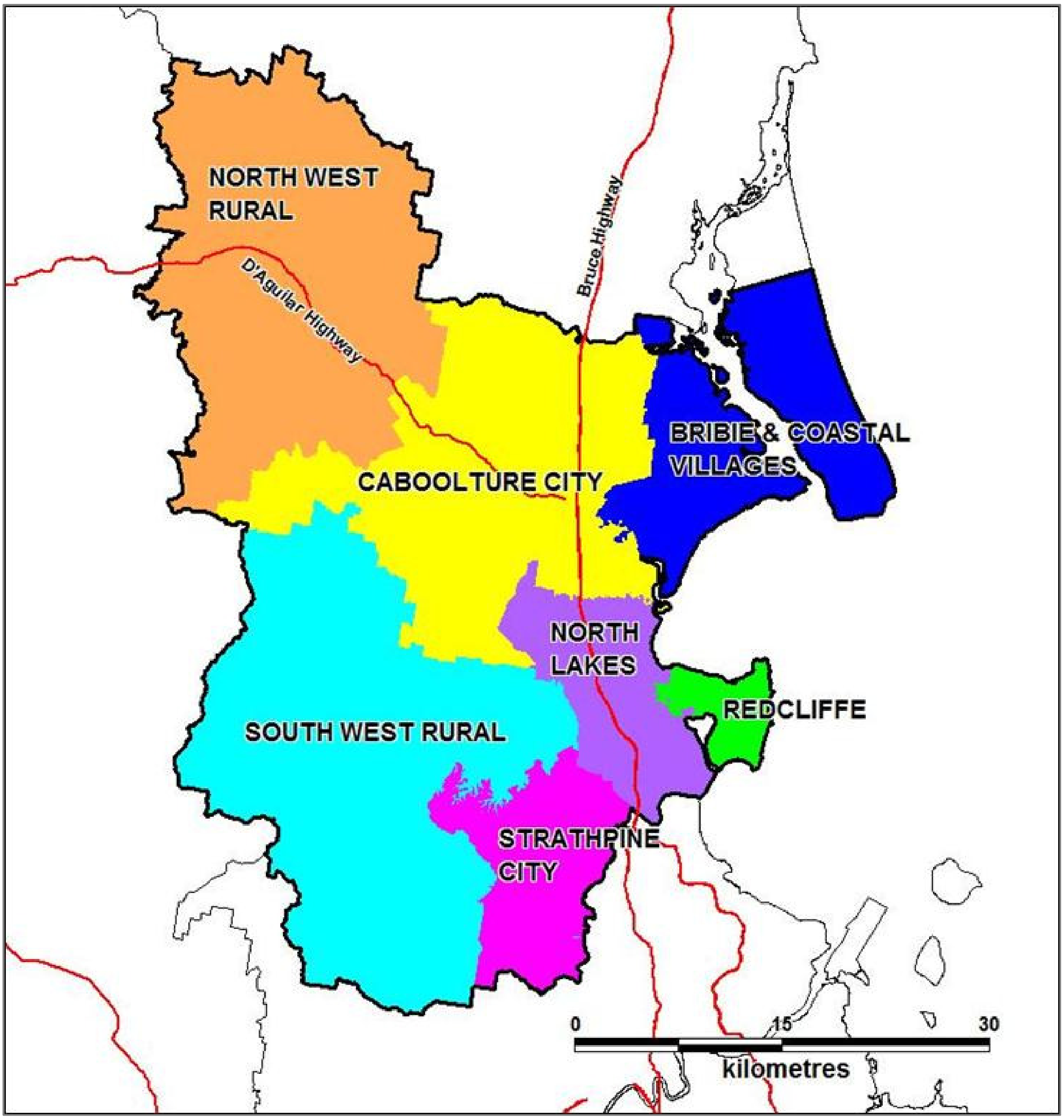
The definition of planning areas used here differs slightly from that in the Moreton Bay Regional Council Draft Strategic Framework as follows:

- The North Lakes Redcliffe Moreton Bay Rail Link planning area has been split into two distinct planning areas; and
- The rural planning area has been split into North West Rural and South West Rural.

The purpose of this section is to provide an overview and context of the various 'districts' identified in the Moreton Bay Regional Council Draft Strategic Framework. Base data for these districts is disaggregated in later sections of this report pertaining to more refined retail and commercial catchments.

Figure 2.1 provides a geographic overview of the planning areas in Moreton Bay Regional Council.

Figure 2.1: Planning Areas Definition, Moreton Bay Regional Council



2.2 Socio Economic Overview

2.2.1 2011 Census Data

A socio-economic profile of the catchment areas as at the 2011 Census of Population and Housing, benchmarked against Moreton Bay Regional Council (Moreton Bay RC), South East Queensland (SEQ) and Queensland, is provided in Table 2.1 below. A number of key points can be drawn from this profile including:

- The population of Moreton Bay RC was 378,045 persons in 2011, accounting for approximately 1.4% of the SEQ population. The most populous planning areas of Moreton Bay RC are North Lakes (26.6% of Moreton Bay RC), Strathpine City (25.8%) and Caboolture City (18.1%);
- Moreton Bay RC had a population profile similar to SEQ and Queensland. The Redcliffe and Bribie and Coastal Villages planning areas had significantly older populations relative to Moreton Bay RC, SEQ and Queensland. On the other hand, the Strathpine City, North Lakes and Caboolture City planning areas had younger population profiles than Moreton Bay RC, SEQ and Queensland;
- Moreton Bay RC recorded a slightly higher incidence of couple families with children households (44.9%) than SEQ (43.6%) and Queensland (42.8%). The Strathpine City planning area had a significantly higher proportion of couple families with children households (51.6%) while Bribie and Coastal Villages (27.7%) and Redcliffe planning areas (36.4%) had a significantly lower proportion of couple families with children households;
- A lower proportion of households were renting in Moreton Bay RC (29.3% of households) than in SEQ (33.0%) and Queensland (33.2%). A higher proportion of households were purchasing their home (i.e. had a mortgage) in Moreton Bay RC (39.8% of households) than in SEQ (36.0%) and Queensland (34.5%). The incidence of households with a mortgage was highest in South West Rural (51.8%) and Strathpine City (49.6%);
- On average, household incomes were marginally lower in Moreton Bay RC ($1,490 per week) than in SEQ ($1,534 per week and Queensland ($1,501 per week). Average household incomes were highest in South West Rural ($2,036 per week) and Strathpine City planning areas ($1,779 per week) and lowest in Bribie and Coastal Villages ($1,075 per week) and Redcliffe ($1,261 per week). Housing costs (i.e. average mortgages and rents) were also marginally lower in Moreton Bay RC than in SEQ and Queensland. Housing costs in South West Rural were significantly higher than all other planning areas;
- Moreton Bay RC recorded similar full-time employment, part-time employment and total employment rates to SEQ and Queensland. Bribie and Coastal Villages recorded a significantly lower full-time employment rate (52.6.8%) than SEQ (59.3%) and Queensland (60.0%), while a higher rate was experienced in Strathpine City (61.7%) and North Lakes (61.5%);
- Caboolture City and Bribie and Coastal Villages recorded significantly higher unemployment rates (8.2% and 8.4% respectively) than Moreton Bay RC (6.2%), SEQ (6.2%) and Queensland (6.1%), while South West Rural (4.1%) and Strathpine City (4.6%) recorded significantly lower unemployment rates;

- A marginally lower proportion of persons with a post-school qualification was recorded in Moreton Bay RC (42.2%) than SEQ (45.6%) and Queensland (43.3%). A significantly higher proportion of persons with post-school qualifications were recorded in South West Rural (54.4%) while a lower proportion was recorded in North West Rural (34.2%) and Bribie and Coastal Villages (36.4%);
- Moreton Bay RC experienced a significantly lower proportion of upper white collar workers (26.6%) than SEQ (32.6%) and Queensland (31.0%) and a marginally higher proportion of lower white collar workers. South West Rural (41.2%) recorded a significantly higher proportion of upper white collar workers than Moreton Bay RC, SEQ and Queensland, while Caboolture City (20.5%) recorded a significantly lower proportion. Significantly lower proportions of lower white collar workers were recorded in North West Rural (30.7%) and South West Rural (31.5%) than in Moreton Bay RC (37.7%), SEQ (35.8%) and Queensland (34.4%). Proportions of lower blue collar workers recorded in South West Rural (10.3%) and Strathpine City (13.5%) were significantly lower than those recorded in Caboolture City (24.4%), Moreton Bay RC (18.0%), SEQ (15.7%) and Queensland (17.9%); and
- North West Rural recorded a significantly higher proportion of employment in the agriculture, forestry and fishing industry (10.1%) than Moreton Bay RC (1.0%) SEQ (0.9%) and Queensland (0.9%).

Table 2.1: Socio-Economic Profile of Planning Areas, 2011 Census

	Strathpine City	North Lakes	Redcliffe	Caboolture City	Bribie and Costal Villages	North West Rural	South West Rural	MBRC	SEQ	Queensland
Population	97,584	100,590	55,993	68,555	30,665	6,371	18,277	378,045	3,302,559	4,332,739
Age Distribution										
0-4 years	7.6%	8.8%	6.0%	8.3%	4.5%	5.7%	6.4%	7.5%	6.9%	6.9%
5-14 years	15.0%	15.9%	11.5%	15.4%	10.6%	13.5%	16.6%	14.5%	13.2%	13.3%
15-19 years	7.6%	7.2%	6.3%	7.7%	5.4%	6.9%	7.9%	7.1%	6.9%	6.8%
20-24 years	6.2%	6.2%	5.3%	7.0%	3.5%	5.8%	4.1%	5.9%	7.1%	6.8%
25-34 years	13.1%	13.8%	10.7%	12.8%	7.1%	12.5%	6.9%	12.1%	14.0%	13.6%
35-44 years	16.1%	15.8%	13.5%	13.6%	10.6%	14.6%	17.0%	14.8%	14.6%	14.3%
45-54 years	14.3%	12.5%	13.9%	12.8%	12.4%	15.7%	17.5%	13.5%	13.4%	13.6%
55-64 years	11.0%	9.7%	13.6%	11.0%	16.7%	13.5%	13.9%	11.7%	11.2%	11.6%
65-74 years	5.9%	5.8%	9.9%	6.6%	17.2%	8.2%	6.9%	7.6%	7.1%	7.4%
75-84 years	2.4%	3.0%	6.5%	3.5%	9.3%	2.8%	2.2%	3.9%	4.0%	4.1%
85 years and over	0.9%	1.2%	2.8%	1.4%	2.8%	0.8%	0.6%	1.5%	1.7%	1.6%
Average age (years)	35.3	34.6	42.0	35.6	47.5	38.3	37.2	37.3	37.4	37.7
Household Type (% of families)										
Couple families with children	51.6%	47.8%	36.4%	43.8%	27.7%	41.5%	47.9%	44.9%	43.6%	42.8%
Couple families without children	33.3%	34.2%	41.8%	34.8%	56.4%	42.1%	33.5%	37.3%	38.2%	39.5%
Single parent family	14.0%	16.9%	20.0%	20.1%	14.9%	15.8%	8.4%	16.6%	16.4%	16.1%
Other	1.2%	1.1%	1.8%	1.3%	0.9%	0.7%	0.6%	1.2%	1.8%	1.7%
Average household size	3.0	3.0	2.5	3.0	2.4	3.2	3.1	2.9	2.8	2.8
Average vehicle ownership	1.9	1.8	1.5	1.8	1.6	2.1	2.3	1.8	1.7	1.7
Household Finances										
% of households fully owning home	27.7%	22.0%	30.0%	23.3%	43.3%	35.0%	36.1%	27.9%	27.8%	29.0%
% of households purchasing home	49.6%	44.2%	27.7%	36.6%	23.8%	42.1%	51.8%	39.8%	36.0%	34.5%
% of households renting	20.5%	30.8%	38.4%	36.8%	29.1%	20.5%	10.3%	29.3%	33.0%	33.2%
Average weekly household income	$1,779	$1,539	$1,261	$1,331	$1,075	$1,318	$2,036	$1,490	$1,534	$1,501
Average monthly housing loan repayment	$2,003	$2,010	$1,859	$1,848	$1,816	$1,844	$2,383	$1,973	$2,033	$1,976
Average weekly rent payment	$325	$320	$274	$280	$277	$267	$350	$298	$322	$299
Labour Market										
Full-time employment (% labour force)	61.7%	61.5%	57.9%	56.7%	52.6%	57.6%	58.3%	59.5%	59.3%	60.0%
Part-time employment (% labour force)	28.0%	26.6%	29.2%	28.9%	32.6%	31.1%	32.2%	28.5%	29.0%	28.2%
Total employment (% labour force)	95.4%	93.9%	93.0%	91.8%	91.6%	94.9%	95.9%	93.8%	93.8%	93.9%

	Strathpine City	North Lakes	Redcliffe	Caboolture City	Bribie and Costal Villages	North West Rural	South West Rural	MBRC	SEQ	Queensland
Unemployment rate (% labour force)	4.6%	6.1%	7.0%	8.2%	8.4%	5.1%	4.1%	6.2%	6.2%	6.1%
Participation rate (% of population > 15 years)	71.8%	66.6%	56.4%	60.1%	43.3%	53.3%	69.3%	63.0%	63.7%	62.8%
Qualifications										
% of persons with a non-school qualification	47.9%	41.8%	39.9%	37.0%	36.5%	34.2%	54.4%	42.2%	45.6%	43.3%
% of persons with Bachelor or higher	16.8%	10.5%	11.3%	7.4%	8.0%	7.6%	24.7%	12.1%	18.3%	15.9%
% of persons with Diploma	9.4%	8.0%	7.6%	6.3%	6.9%	5.8%	10.4%	8.0%	8.2%	7.5%
% of persons with Certificate	21.8%	23.3%	21.1%	23.3%	21.6%	20.8%	19.3%	22.2%	19.1%	19.9%
Occupation										
Upper White Collar										
Managers	11.2%	10.2%	9.7%	9.3%	10.8%	14.7%	15.0%	10.7%	11.7%	12.0%
Professionals	19.4%	14.2%	16.0%	11.2%	12.4%	11.6%	26.3%	15.9%	20.9%	18.9%
Subtotal	30.6%	24.4%	25.7%	20.5%	23.3%	26.3%	41.2%	26.6%	32.6%	31.0%
Lower White Collar										
Community & Personal Service Workers	10.2%	10.6%	11.6%	10.6%	10.9%	9.7%	8.5%	10.5%	10.0%	10.0%
Clerical and Admin Workers	18.8%	16.9%	15.9%	14.7%	15.3%	12.3%	15.2%	16.7%	15.6%	14.7%
Sales Workers	10.0%	11.1%	10.4%	10.9%	11.6%	8.8%	7.8%	10.5%	10.2%	9.8%
Subtotal	39.0%	38.7%	37.9%	36.2%	37.8%	30.7%	31.5%	37.7%	35.8%	34.4%
Upper Blue Collar										
Technicians & Trades Workers	15.3%	16.3%	15.4%	16.9%	17.2%	16.4%	15.1%	16.0%	14.2%	14.9%
Subtotal	15.3%	16.3%	15.4%	16.9%	17.2%	16.4%	15.1%	16.0%	14.2%	14.9%
Lower Blue Collar										
Machinery Operators & Drivers	5.7%	8.1%	7.3%	9.9%	8.2%	9.1%	4.0%	7.4%	6.1%	7.3%
Labourers	7.7%	10.8%	11.7%	14.5%	11.6%	15.5%	6.2%	10.5%	9.6%	10.6%
Subtotal	13.5%	18.9%	19.0%	24.4%	19.8%	24.6%	10.3%	18.0%	15.7%	17.9%
Employment by Industry (% of employees)										
Agriculture, forestry & fishing	0.2%	0.4%	0.3%	2.9%	1.3%	10.1%	1.4%	1.0%	0.9%	0.9%
Mining	1.0%	1.0%	1.0%	1.0%	1.7%	1.4%	1.6%	1.1%	1.2%	1.2%
Manufacturing	8.6%	11.2%	10.6%	10.7%	9.3%	10.1%	6.8%	9.9%	8.7%	8.7%
Electricity, gas, water & waste services	1.5%	1.5%	1.1%	1.5%	1.1%	1.5%	1.4%	1.4%	1.1%	1.1%
Construction	8.9%	9.9%	9.7%	11.4%	12.0%	11.9%	10.2%	10.0%	9.1%	9.1%
Wholesale trade	3.9%	4.2%	3.7%	3.9%	3.4%	3.2%	3.6%	3.9%	3.9%	3.9%
Retail trade	10.8%	12.3%	10.9%	12.5%	13.0%	11.2%	8.5%	11.5%	10.7%	10.7%
Accommodation & food services	5.1%	5.4%	6.5%	6.0%	7.5%	4.6%	4.4%	5.6%	6.9%	6.9%
Transport, postal & warehousing	5.7%	7.2%	6.8%	7.1%	5.7%	5.1%	4.9%	6.5%	5.2%	5.2%
Information media & telecommunications	1.5%	1.1%	1.2%	0.9%	0.9%	0.9%	1.5%	1.2%	1.4%	1.4%

	Strathpine City	North Lakes	Redcliffe	Caboolture City	Bribie and Costal Villages	North West Rural	South West Rural	MBRC	SEQ	Queensland
Financial & insurance services	3.8%	2.8%	2.2%	1.8%	1.9%	1.1%	3.1%	2.8%	3.2%	3.2%
Rental, hiring & real estate services	1.5%	1.8%	1.9%	1.4%	2.5%	1.4%	2.0%	1.7%	1.9%	1.9%
Professional, scientific & technical services	7.1%	4.9%	5.1%	4.0%	4.6%	4.3%	10.8%	5.7%	7.6%	7.6%
Administrative & support services	3.1%	3.3%	3.3%	3.4%	3.1%	2.7%	3.0%	3.2%	3.4%	3.4%
Public administration & safety	9.3%	6.9%	6.3%	5.8%	5.6%	7.2%	7.6%	7.3%	6.6%	6.6%
Education & training	8.0%	6.1%	6.8%	6.1%	6.2%	5.2%	9.5%	6.9%	8.0%	8.0%
Health care & social assistance	12.7%	12.7%	15.0%	11.7%	12.7%	9.8%	11.5%	12.7%	12.3%	12.3%
Arts & recreation services	1.3%	1.0%	1.2%	1.1%	1.2%	1.3%	1.7%	1.2%	1.6%	1.6%
Other services	6.0%	6.4%	6.5%	6.7%	6.6%	7.1%	6.3%	6.4%	6.1%	6.1%

Source: Australian Bureau of Statistics (2012a)

2.3 Population and Household Projections

The population of Moreton Bay RC is projected to increase from 391,596 persons in 2012 to 534,362 persons in 2031, or by approximately 1.6% per annum. The number of households in Moreton Bay RC is projected to increase by 1.7% per annum from 155,589 households in 2012 to 216,221 households in 2031.

The rate of population growth and household formation in Moreton Bay RC is anticipated to be slightly lower than in SEQ and Queensland.

Within Moreton Bay RC, the rate of population growth and household formation is projected to be highest in the North Lakes, Caboolture City and North West Rural planning areas.

The Redcliffe, Bribie and Coastal Villages and South West Rural planning areas are projected to record population growth and household formation rates significantly lower than in Moreton Bay RC, SEQ and Queensland.

Table 2.2 below provides a summary of the projected population growth and household formation within Moreton Bay RC by planning area, benchmarked against SEQ and Queensland.

Table 2.2: Projected Population and Households, 2012-2031

	2012	2016	2021	2026	2031	Ave. Ann Growth 2012 to 2031
Population						
Strathpine City	98,985	105,650	111,888	116,737	120,649	1.0%
North Lakes	103,901	123,130	142,217	160,548	172,693	2.7%
Redcliffe	57,083	59,183	61,298	62,593	64,298	0.6%
Caboolture City	69,600	81,734	90,607	95,679	106,455	2.3%
Bribie & Coastal Villages	34,090	35,318	36,503	36,539	36,602	0.4%
North West Rural	8,621	9,679	10,792	11,744	13,067	2.2%
South West Rural	19,315	20,244	20,372	20,400	20,598	0.3%
Moreton Bay Regional Council	391,596	434,938	473,677	504,240	534,362	1.6%
SEQ	3,130,730	3,394,182	3,729,934	4,064,556	4,393,841	1.8%
Queensland	4,703,979	5,092,858	5,588,617	6,090,548	6,592,857	1.8%
Households						
Strathpine City	36,117	39,017	41,779	44,044	45,649	1.2%
North Lakes	39,473	47,007	54,730	61,882	66,640	2.8%
Redcliffe	26,697	27,849	29,362	30,702	31,755	0.9%
Caboolture City	26,456	31,144	34,888	37,314	41,385	2.4%
Bribie & Coastal Villages	16,940	17,599	18,167	18,195	18,217	0.4%
North West Rural	3,268	3,739	4,238	4,670	5,235	2.5%
South West Rural	6,639	7,034	7,169	7,226	7,340	0.5%
Moreton Bay Regional Council	155,589	173,389	190,333	204,033	216,221	1.7%
SEQ	1,225,957	1,342,392	1,491,036	1,638,889	1,787,540	2.0%
Queensland	1,844,869	2,020,294	2,241,451	2,463,297	2,689,502	2.0%

	2012	2016	2021	2026	2031	Ave. Ann Growth 2012 to 2031
Average Household Size						
Strathpine City	2.74	2.71	2.68	2.65	2.64	-
North Lakes	2.63	2.62	2.60	2.59	2.59	-
Redcliffe	2.14	2.13	2.09	2.04	2.02	-
Caboolture City	2.63	2.63	2.60	2.57	2.58	-
Bribie & Coastal Villages	2.01	2.02	2.02	2.02	2.02	-
North West Rural	2.64	2.59	2.55	2.51	2.50	-
South West Rural	2.91	2.88	2.84	2.82	2.81	-
Moreton Bay Regional Council	2.52	2.51	2.49	2.47	2.47	-
SEQ	2.55	2.53	2.50	2.48	2.46	-
Queensland	2.55	2.52	2.49	2.47	2.45	-

Note: The population and household projections presented in this table for Moreton Bay RC are based on those presented in Moreton Bay Regional Council (2012a) Planning Assumptions Specification - October 2012 and have been adjusted to address the inconsistency between planning area boundaries do not match perfectly with SLA boundaries.
Source: Moreton Bay Regional Council (2012a), Office of Economic and Statistical Research (2011), Office of Economic and Statistical Research (2012)

2.4 Labour Force

This section provides a brief overview of the small area labour market statistics, available at the statistical local area (SLA) level and above. The analysis has been undertaken at SLA level and above because there is presently no means to adjust for SA1 boundaries.

In the past four years to 2011, the resident labour force in Moreton Bay RC increased from 172,463 persons to 186,701 persons or by 2.7% per annum. Over that period, total and sub-regional labour force growth in Moreton Bay RC mirrored the Queensland growth rate. In 2011 however, the Moreton Bay RC labour force shrank (by 0.4%) whereas the Queensland labour force grew (by 1.5%).

A summary of the labour force size in the Moreton Bay RC, its planning areas and Queensland between 2008 and 2011 is presented in Table 2.3.

Table 2.3: Labour Force Size, Planning Areas in Moreton Bay Regional Council, 2008-2011

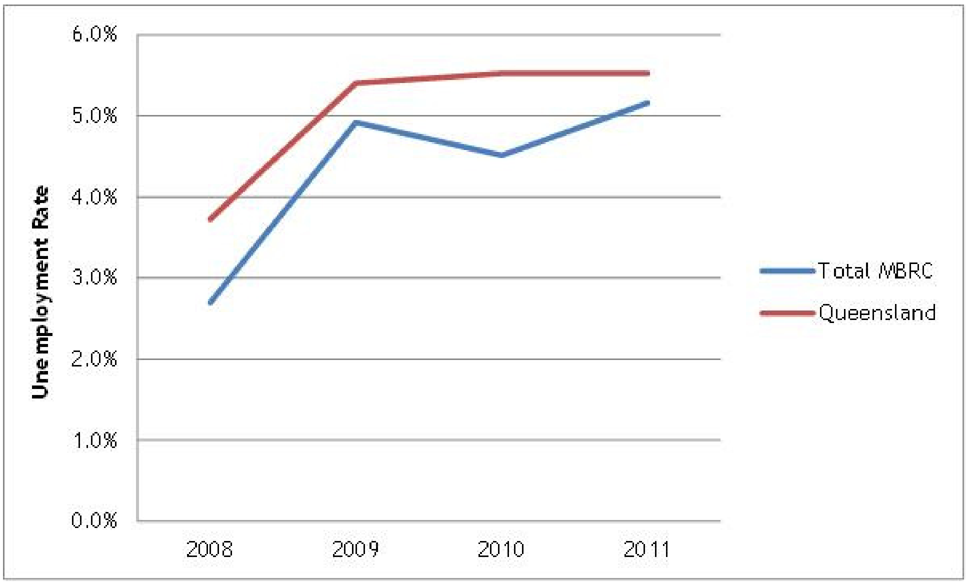
	Strathpine City	North Lakes	Redcliffe	Caboolture City	Bribie and Costal Villages	North West Rural	South West Rural	MBRC	QLD
2008	53,285	41,325	25,015	26,210	13,025	2,635	10,970	172,463	2,292,384
2009	55,683	43,192	26,143	27,397	13,614	2,755	11,466	180,249	2,354,420
2010	57,923	44,942	27,197	28,511	14,168	2,867	11,931	187,538	2,436,875
2011	57,675	44,738	27,079	28,378	14,102	2,853	11,876	186,701	2,472,850
Ave. Ann. Chg, 2008-11	**2.7%**	**2.7%**	**2.7%**	**2.7%**	**2.7%**	**2.7%**	**2.7%**	**2.7%**	**2.6%**
Ave. Ann. Chg, 2010-11	**-0.4%**	**-0.5%**	**-0.4%**	**-0.5%**	**-0.5%**	**-0.5%**	**-0.5%**	**-0.4%**	**1.5%**

Source: Department of Employment and Workplace Relations (various years)

2.4.1 Unemployment

Between 2008 and 2011, all planning areas within Moreton Bay RC recorded a rise in unemployment as did Queensland, although the Moreton Bay RC unemployment rate was consistently lower than the state average (Figure 2.2). The unemployment rate was lowest in South West Rural and Strathpine City planning catchments, and highest in Caboolture City, Bribie and Coastal Villages and Redcliffe.

Figure 2.2: Unemployment Rate, Moreton Bay RC and QLD, 2003-2011



Source: Department of Employment and Workplace Relations (various years)

The unemployment rates in each of the planning areas in Moreton Bay RC, benchmarked against Moreton Bay RC and Queensland between 2008 and 2011 are summarised in Table 2.4.

Table 2.4: Unemployment Rate, Planning Areas in Moreton Bay RC, 2008 to 2011

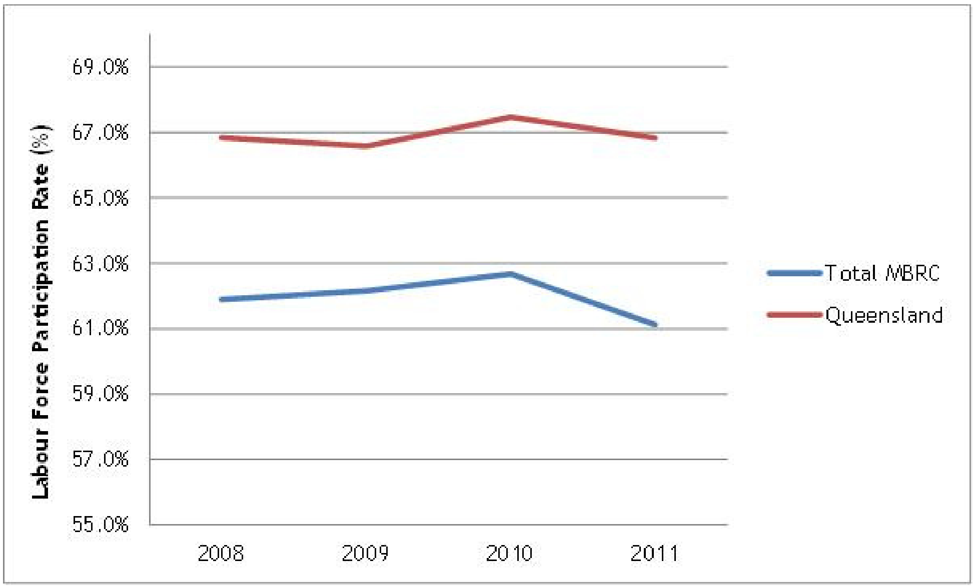
	Strathpine City	North Lakes	Redcliffe	Caboolture City	Bribie and Costal Villages	North West Rural	South West Rural	MBRC	QLD
2008	1.5%	2.6%	3.6%	4.4%	4.5%	2.6%	1.0%	2.7%	3.7%
2009	2.8%	4.8%	6.3%	7.8%	7.9%	5.4%	2.0%	4.9%	5.4%
2010	2.6%	4.5%	5.6%	7.2%	7.1%	4.6%	1.7%	4.5%	5.5%

Source: Department of Employment and Workplace Relations (various years)

2.4.2 Labour Force Participation

The labour force participation rate in Moreton Bay RC was consistently lower than Queensland between 2008 and 2011. Recent falls in participation rates have been sharper in Moreton Bay RC than in Queensland (Figure 2.3).

Figure 2.3: Labour Force Participation Rate, Moreton Bay RC and Queensland, 2008-2011



Source: Department of Employment and Workplace Relations (various years)

The average labour force participation rate between 2008 and 2011 was:

- 73.6% in Strathpine City planning area;
- 61.0% in North Lakes planning area;
- 56.2% in Redcliffe planning area;
- 58.5% in Caboolture City planning area;
- 45.9% in Bribie and Coastal Villages planning area;
- 50.5% in North West Rural planning area;
- 71.9% in South West Rural planning area;
- 62.0% in Moreton Bay RC; and
- 66.9% in Queensland.

The labour force participation rate in the Moreton Bay RC, its planning areas and Queensland between 2008 and 2011 are summarised in Table 2.5.

Table 2.5: Labour Force Participation Rate, Planning Areas in Moreton Bay RC, 2008 to 2011

	Strathpine City	North Lakes	Redcliffe	Caboolture City	Bribie and Costal Villages	North West Rural	South West Rural	MBRC	QLD
2008	72.7%	62.0%	55.3%	59.3%	45.6%	50.6%	71.0%	61.9%	66.8%
2009	73.6%	61.5%	56.3%	58.7%	46.0%	50.8%	71.8%	62.2%	66.6%
2010	75.0%	61.0%	57.4%	58.5%	46.8%	51.2%	73.3%	62.7%	67.5%
2011	73.1%	59.5%	55.9%	57.4%	45.3%	49.6%	71.6%	61.1%	66.8%
Ave. 2008-11	**73.6%**	**61.0%**	**56.2%**	**58.5%**	**45.9%**	**50.5%**	**71.9%**	**62.0%**	**66.9%**

Source: Department of Employment and Workplace Relations (various years), Australian Bureau of Statistics (2011)

2.5 Implications for Retail and Commercial Demand within Moreton Bay Regional Council

The planning areas projected to record the highest rate of growth over the next nineteen years are North Lakes, Caboolture City and North West Rural. These regions are likely to demand the highest additions to retail floor space to cater for expanding populations. A number of recently lodged material change of use applications, including the expansion of Westfield North Lakes and the proposed Costco at North Lakes reflect the increasing demand for retail floor space within this catchment.

The Redcliffe, Bribie and Coastal Villages, and South West Rural catchments are anticipated to record the lowest rate of population and household growth over the next nineteen years. Additional retail development within these catchments would tend to be incremental to meet existing gaps within the retail network, as forecast population and household growth within these catchments will be insufficient to support significant changes in retail provision.

The largest labour force populations within Moreton Bay Regional Council are in the Strathpine City, North Lakes, Caboolture City and Redcliffe planning areas. Of these four areas, only the Strathpine City catchment recorded a labour force participation rate that was high relative to the Moreton Bay Regional Council and Queensland averages.

The South West Rural and Strathpine City planning areas recorded the highest incidence of employment in commercial office sectors within Moreton Bay Regional Council. It is likely that a significant proportion of persons employed within commercial office sectors in the South West Rural catchment (which includes Petrie, Dayboro and Samford) commute to Brisbane City as their place of employment.

The North Lakes planning area is anticipated to record an increasing proportion of persons employed in commercial office sectors, as the range of employment opportunities increases within this catchment.

The Redcliffe planning area recorded a particularly high incidence of employment in health care and social assistance, possibly due to employment of local residents at the Redcliffe Hospital.

3 KEY POLICY AND PLANNING ISSUES

The following documents were reviewed during the course of this present study:

- State level planning documents;
  - South East Queensland Regional Plan 2009-2031;
  - Draft Queensland Planning Provisions v3;
  - Next Generation Planning – A Handbook for Planners, Designers and Developers in South East Queensland 2011;
- Local level planning documents;
  - The Moreton Bay Regional Council Draft Strategic Framework 2011;
  - The Caboolture Shire Planning Scheme 2005;
  - The Pine Rivers Plan 2005;
  - The Redcliffe City Planning Scheme 2005;
  - Mango Hill Development Control Plan 1998;
- Local area plans;
  - Mango Hill Local Area Plan;
  - Griffin Local Area Plan; and
  - Dakabin Local Area Plan.

A summary of the literature reviews can be found in Appendix A.

From the literature reviews this study has drawn a series of overall town planning conclusions that are relevant to needs within the retail and commercial sectors, and to the future approach adopted in respect of "centres planning" in Moreton Bay Regional Council.

The initial points identified are observations derived from an appraisal of the content and approach of existing statutory planning instruments, and the extent to which their content and regulatory approach will assist or hinder future commercial, retail and centres planning. The list of observations made at this stage of the project is not intended to be exhaustive or complete and is confined to those that emerged from the literature reviews. Observations made are intended to inform a broader and more detailed assessment of retail, commercial and centres planning in subsequent stages of the study.

3.1 Key Strategic and Statutory Planning Issues

Key planning and policy issues identified have been categorised to group common issues and provide a framework for new or remedial policy responses likely to emerge later in the study.

Issues identified through the initial literature review have been broadly categorised as follows:

- ***Statutory Compliance / Integrity:*** The need for planning and policy approaches that comply with relevant statutory requirements particularly those relating to the composition and regulatory approach mandated under the *Sustainable Planning Act 2012*;
- ***Statutory Alignment:*** The need for retail, commercial and centres planning instruments to vertically integrate with parent policy instruments (e.g. SEQ Regional Plan);
- ***Composition:*** The need for the composition of retail, commercial and centres planning instruments to comply with mandatory statutory or regulatory provisions dealing with structure and content (e.g. Queensland Planning Provisions QPP);
- ***Consistency:*** The need to ensure current alternative strategic and statutory planning approaches for retail, and commercial uses and centres across the MBRC are rationalised to achieve uniformity and consistency;
- ***Complexity:*** The need to ensure land use regulatory approaches applied to retail and commercial uses and centres, are no more complex than is necessary to efficiently and effectively articulate and implement preferred policy outcomes. In this regard an emphasis on lowering the regulatory burden is favoured, particularly where regulation results in a lack of procedural clarity, unnecessary costs and/or does not materially enhance the achievement of preferred planning outcomes. Eradicating "regulation for regulations sake" is of particular importance; and
- ***Currency:*** The need to ensure contemporary planning approaches and industry best practices is reflected in the composition and structure of retail, commercial and centres planning instruments.

3.1.1 Statutory Compliance / Integrity

There is a need to ensure that future planning scheme provisions dealing with retail and commercial development and centres planning are framed so as to definitively respond to and address the "key elements" and "core matters" relevant to planning schemes pursuant to sections 88 and 89 of the *Sustainable Planning Act 2009*.

Section 55 of the *Sustainable Planning Act 2009* requires that planning scheme provisions are amended to achieve consistency with the standard planning scheme provisions. The applicable standard planning scheme provisions in this case are the Queensland Planning Provisions (QPP v3).

3.1.2 Statutory Alignment

A review of existing planning schemes and scheme components regulating development in the MBRC area reveals a general absence of vertical integration between existing planning schemes and both the Activity Centres concept and Activity Centres Network under the SEQ Regional Plan 2009-2031.

There is notable disparity in the extent to which former planning schemes align with the SEQ Regional Plan. Where this disparity is the greatest it is primarily a result of:

- Planning Schemes pre-dating the formulation of the SEQ Regional Plan; and/or
- The adoption of more traditional retail/commercial centre hierarchies as a means of implementing a structured approach to centre order and function.

Planning Schemes / Instruments which go to some way to incorporating an Activity Centres network do not fully embrace relevant principles at all levels.

3.1.3 Composition

Section 55 of the *Sustainable Planning Act 2009* requires that planning scheme provisions are amended to achieve consistency with the standard planning scheme provisions. The applicable standard planning scheme provisions in this case are the Queensland Planning Provisions (QPP v3).

A common and uniform methodology for retail, commercial and centres planning is required to address the mandatory elements of the QPP, which most notably include:

- Strategic Framework - Strategic outcomes, themes, elements etc.
- The standard suite land use and administrative definitions;
- The standard suite of land use zones;
- The tables of assessment (format and composition); and
- The assessment categories (most notably the identification of exempt and compliance assessable development within tables of assessment).

Locality based provisions adopted under some existing planning schemes (e.g. Pine Rivers Plan) are not readily transferrable or compatible with the predominantly zone/precinct based provisions mandated by the QPP.

3.1.4 Consistency

A review of existing planning schemes and scheme components regulating development in the MBRC area reveals a general absence of horizontal integration between existing planning schemes in terms of components, regulatory approach and terminology for the regulation of retail and commercial development and identified centres. A uniform and consistent centres typology across the new Local Government area will be required to achieve improved clarity of land use intent for different centres in the network and the adoption of consistent implementation mechanisms.

The alignment of existing centre classification systems used under the component planning schemes of the MBRC will be required to appropriately reflect the SEQ 'Place Model' and the QPP.

3.1.5 Complexity

Some planning instruments, (for example the Pine Rivers Plan which relies on multiple levels of regulation including localities, locality precincts, zones and zone sub-precincts to convey preferred land use intent) are unnecessarily complex and overly prescriptive. Multi-tiered regulatory approaches can fragment and obscure the clear articulation of land use intent and results in unnecessary over regulation.

Differentiation in the role and function of alternative retail and commercial areas is best achieved at Zone level to the extent permitted under the QPP. The Redcliffe Planning Scheme provides an example of a planning instrument where limited differentiation in role and function at Zone level (or an under reliance on zones for this purposes) has resulted in an over reliance on precincts (preferred use areas).

Performance Outcomes and Acceptable Outcomes within codes are not relied upon to articulate the centre role or function as is presently the case under certain codes forming part of existing planning schemes (e.g. Redcliffe Planning Scheme).

3.1.6 Currency

There is notable disparity in the manner and extent to which existing planning instruments embrace and facilitate contemporary retail and commercial centres planning approaches including but not limited to those related to:

- Mixed use development;
- Use "substitutability" or "interchangeability";
- Centre activation;
- In-centre residential development;
- Centre, accessibility, legibility and "walkability"; and
- Transit orientated development (TOD) principles.

The function and viability of many existing activity centres is threatened by retail and commercial developments that are established in "out-of centre" locations, particularly stand-alone developments such as office parks, large format retailing along main roads, or clusters of highway retail and semi-commercial outlets. Often these have poor accessibility to public transport and encourage an over-reliance on the private vehicle. Strategies purposefully aimed at both recognising historical development trends (commercial corridors), but also regulating inappropriate out-of-centre development are required.

4 RETAIL, COMMERCIAL AND CENTRE TRENDS

4.1 Types of Shopping Trips

In considering the needs of consumers and the role and function of centres, it is important to consider the five types of trips typically undertaken by shoppers.

- ***Convenience / buy fresh trip:*** The convenience / buy fresh trip is typically for frequently used items (e.g. video hire), perishable items (e.g. milk, bread, takeaway meals) or items that have a specific use-life (e.g. daily newspaper). The needs of this trip are met by either convenience centres or supermarket anchored shopping centres;
- ***Main weekly (or fortnightly) shopping trip:*** The main weekly (fortnightly) shopping trip is for groceries and household essentials and is normally made at a centre which includes a full-line supermarket. This trip is considered a chore to be done as conveniently, cheaply and efficiently as possible;
- ***Comparison shopping:*** Comparison shopping is typically planned to be enjoyable and linked with other activities such as meeting friends or going to the movies. Clothing and other discretionary items are usually the main targets in this type of trip. Shoppers will visit a number of stores, comparing goods and prices before making a purchase decision. Comparison shopping trips typically occur within the city centre, or at a regional or sub-regional centre which offers a wide range and depth of merchandise combined with a range of entertainment facilities;
- ***Special purchase shopping trip:*** A special purpose shopping trip typically involves shopping for bulky goods items, such as furniture, sporting equipment, electrical goods, auto accessories or hardware. A number of home and leisure centres have established in response to special purpose shopping trips, as well as a range of category killer stores such as Harvey Norman, Bunnings, Super Cheap Auto and Toys R Us; and
- ***Leisure shopping trip:*** A leisure shopping trip is similar in nature to a comparison shopping trip, with the main point of difference being that a leisure shopping trip is usually undertaken without a specific list of goods in mind. This type of trip is more likely to be undertaken while on holiday when time is less pressing. Larger regional centres, factory outlet centres and markets appeal to this type of shopping trip.

4.2 Types of Shoppers

RDG Insights recently classified Australian shoppers based on psychological profiling and have identified seven broad categories:

- ***The harmonizer:*** Harmonizers are described as social, family oriented creatures of habit who love nature and are attracted to their home town. Harmonizers like welcoming, open environments with opportunities to socialise. An estimated 33% of Australian shoppers are classified as harmonizers;
- ***The open-minded:*** The open minded shopper is an indulgent, life affirming optimist and is savouring, imaginative and easy going. An estimated 18% of Australian shoppers are classified as open-minded;

- ***The traditionalist:*** Traditionalists are risk-conscious and security oriented. Traditionalists are loyal to brands and local retailers and want consistency, easy orientation and cleanliness. An estimated 14% of Australian shoppers are classified as traditionalists;
- ***The disciplined:*** Disciplined shoppers concentrate on quality and functionality and prefer subtle colours and a clear assortment with few alternatives. An estimated 13% of Australian shoppers are classified as disciplined;
- ***The hedonist:*** The hedonist is an early adopter and prefers inspiring, fashionable and aspirational stores with intense lighting and bright signs. An estimated 12% of Australian shoppers as classified as hedonists;
- ***The performer:*** Performers are prestige and performance oriented, preferring strong branded statements, graphics, subdued lighting with highly fashionable products and the impression of scarcity. An estimated 5% of Australian shoppers are classified as performers; and
- ***The adventurer:*** The adventurer is attracted to risk and thinks unconventionally. Impulse purchase areas appeal to this type of shopper. An estimated 5% of Australian shoppers are classified as adventurers.

The variance in types of shoppers means that centres need to offer a diversity of tenants to cater to shoppers.

4.3 Types of Retail Centres

Although the retail network comprises a range of centre types which satisfy various consumer needs. The retail centre definitions as presented below do not fit exactly with those as presented in the Queensland Planning Provisions, nor match exactly with the definitions as presented in the three planning schemes currently in place for the Moreton Bay Region, but they do seek to provide a concise overview of the types of retail centres typically present in a centres hierarchy.

The following definitions generally apply to each retail hierarchy element:

- ***Regional and Sub-regional Centres:*** Centres providing for higher order retailing (such as department stores and discount department stores) and other commercial activities, entertainment, community and recreation facilities to serve a regional population in excess of 50,000 persons. A lower household threshold is acceptable if the population to be served has special characteristics, or is isolated from other shopping opportunities;
- ***District Centres:*** Centres serving a series of neighbourhoods with a total population of up to 35,000 persons and providing a range of retail, office, entertainment, community and recreational facilities to cater for the major weekly shopping trip. The store mix of a district shopping centre generally includes a major supermarket, a full range of food and personal services, and a variety or discount store. Lettable retail area in district centres normally falls between 5,000m^2 and 15,000m^2, but it is the function of the centre, rather than the size, which is critical;
- ***Neighbourhood Centres:*** Centres providing a limited range of retail services to discrete communities of up to 6,000 persons. These centres normally provide only 2,000 m^2 to 4,000 m^2 of lettable retail floor space (excluding professional services) anchored by a full-line supermarket, have less than twenty specialty stores, with a merchandise mix highly biased towards food items;

- ***Local Convenience Centres:*** small-scale businesses serving their immediate localities, generally characterised by small convenience stores often located on major road arterials; and
- ***Retail Showroom Facilities:*** generally defined to include those bulky goods retailers that cater for home improvement/homeware products, garden centre products, indoor/outdoor entertainment/leisure/recreational products and new/used motor vehicle sales. Retail showrooms encompass a broad range of large stores involved in the sale of goods such as motor vehicles, furniture, domestic hardware, floor coverings, household appliances and electrical goods, including computers. Other retailers often attracted by the large floor areas, cheaper rents and the type of customers attracted to these centres, include toy and sports retailers, auto accessory outlets, soft furnishings and home improvement specialists.

4.4 Trends in Retail Development

As both the types of retail shoppers and shopping trips have evolved over time, the retail industry has adjusted to meet the ever changing needs of consumers. One of the major changes in retailing activity in recent times has been the evolution of bulky goods retailing and factory outlet retailing. These trends have highlighted the need for centres strategies and planning schemes to be designed in order to accommodate the diverse and evolving nature of retailing.

Recent trends in retail development include the following:

- ***Bulky goods retailing:*** Bulky goods centres consist of a collection of 'big box' retailers usually characterised by large stores, cheaper construction and minimal fit out. Initially, the majority of bulky good centre tenants were 'pure' bulky goods centres, featuring furniture, electrical goods, hardware and a wide range of homewares retailers, including kitchen, bathroom, brick and other display tenants. However, as the retail segment has developed, there are increasingly more 'hybrid' retailers, such as JB Hi Fi, that sell both bulky goods and smaller items commonly sold in traditional retail shops. Local government planning documents have struggled to accommodate bulky goods retailing since the emergence of the category in the 1980s (at the time referred to as Homemaker Centres). The principal challenge in planning for bulky goods retailing is the segment's breadth and diversity and its overlaps with other retail formats (most notably discount department stores and department stores). The range and variety of retail goods appearing in bulky goods centres and freestanding locations are growing and will continue to pressure homewares traders and department stores in traditional shopping centres. This trend is responsible, in part, for the increasing regulation of centre location in various state and local level planning instruments;
- ***Category killers:*** Category killers, a subset of bulky goods retailing, are large stores that provide an extensive range within a narrow product area that are competitive with more traditional retailers. Toys R Us, IKEA, Officeworks, Bunnings and Masters are examples of Australia's major category killers. Category killers are found in regional shopping centres, but are more commonly located on freestanding sites and in bulky goods centres. The emergence of category killers creates a major challenge for planning instruments. The longevity of category killers is uncertain, with a number of narrowly focussed category killers struggling to maintain their place in the market (e.g. WOW Sight and Sound). Ironically, the world's first category killer, Toys R Us has struggled for sales in recent years, because of the seasonality associated with toy purchases. More broadly based category killers have tended to experience greater success. The most obvious example within the Australian context is Bunnings,

although there are numerous examples of other successful category killers in other retail segments (e.g. Dan Murphy's, IKEA, Rebel Sport, JB Hi Fi, etc.);

- ***Factory outlets / clearance centres:*** Factory outlets, like bulky goods centres, rely on lower prices and the cumulative attraction of an agglomeration of tenants to generate consumer interest and ultimately shopper trips. Factory outlets typically include end of run, seconds, overrun and in-store or 'own brand' label stock. The factory outlet concept originated in the US in the early 1970s and experienced rapid growth. Recent estimates suggest that there are approximately 400 of these centres in the US. Factory outlet retailing and centres are gathering momentum in Australia, despite planning (and competitor) opposition. One of the major participants in this segment has been Direct Factory Outlet (DFO); however the recent deterioration in the retail segment and possibly over-expansion has seen DFO face financial difficulties. Apart from DFO, the most significant factory outlet centre in Queensland is Harbour Town on the Gold Coast. Consumer demand for value for money, coupled with an increasing frequency of sales 'events' in traditional stores, which has created a 'never pay retail' mentality, benefits factory outlet centres. Ultimately, however the growth potential of factory outlet centres and stores is likely to be limited, because too many would cannibalise the retail sales bases or the individual brands in central business district and regional shopping centres. With Australia's small population base, factory outlet centres might well be limited to a small number in capital city and major provincial areas;
- ***Online retailing:*** There has been renewed focus on the impacts of online retailing on traditional bricks and mortar stores in Australia, with anecdotal evidence suggesting that the high Australian dollar is leading to increasing retail expenditure online at overseas retailers rather than at local bricks and mortar stores. The PwC and Frost & Sullivan Digital Media Research 2012 report identified a number of factors stimulating growth in online retail in Australia and New Zealand, including greater variety / choice of goods, widespread usage of mobile devices, continued strength of the Australian and New Zealand dollar, increasing level of sophistication and comfort amongst consumers across all age groups, use of social media by both consumers and retailers to drive brand awareness and proliferation of group buying sites. It is anticipated that online retailing will become increasingly important for Australian retailers, with those seeking to improve the multi-channel experience for shoppers likely to record the strongest performance in the short to medium term;
- ***Convenience focus:*** Increasingly time-poor consumers are demanding quick, convenient access to chore activities such as food and grocery shopping, with shoppers shopping more often for a smaller basket of goods. Supermarkets have responded with extended trading hours, store and centre layout designs aimed at amplifying convenience, and incorporating meal solutions; and
- ***Fresh food focus:*** In recent times, shoppers have been increasingly drawn to purchasing fresh locally sourced produce, as evidenced by the success of the Jan Powers Farmers Markets (held in various Brisbane locations). Coles and Woolworths have responded to this trend by actively promoting their fresh food focus. Woolworth has made their in-store butchers and bakers more visible to shoppers in a number of stores, suggesting to customers that their product is essentially prepared locally and on-site. The layout of the fresh produce section in both Coles and Woolworths has also been altered to provide a 'market' feel.

4.5 Commercial Office Trends

A number of trends in the commercial office market have been observed, including:

- ***Preference for CBD Location***: Central business districts offer a large range of often prestige office space, access to amenities and services for both employers and employees; and in large centres access to high standard public transport;
- ***Other locational requirements:*** In an increasingly tight labour market, the needs and expectations of employees become increasingly significant in the locational decisions of businesses. Factors considered particularly important include access to public transport and dining/takeaway food options for staff;
- ***Campus style accommodation:*** Large floor plate, low rise commercial office buildings have been developed in recent years to provide lower cost office accommodation in city fringe locations. An example of campus style accommodation office provision is Brisbane Technology Park at Eight Mile Plains. Other facilities typically provided in campus style accommodation include relatively generous carparking provision and a range of dining/takeaway food options. Campus style accommodation is typically unsuitable in dense high cost CBD locations due to its low floor space yield (i.e. it is land extensive);
- ***Co-location of business activity:*** In an effort to streamline business operation, there has been an increasing trend to co-locate office, warehouse/manufacturing and distribution activities in the one location. This has generated increased demand for office space in low impact industrial precincts such as North Lakes Business Park, which accommodates a mix of commercial office and industrial tenants; and
- ***Changing floor plate sizes:*** Demand for floor space per person in Australia increased from approximately 14m^2 per person in the 1970s to 20m^2 per person in the 1990s. The provision of commercial office space per person in high cost CBD locations is typically less generous than in suburban and regional markets.

4.6 In-Centre Residential Trends

In-centre residential product has been developed in recent years, and has appealed in particular to young professionals and empty nesters. Critical success factors for in-centre residential product include walking proximity to major shopping and entertainment facilities and accessibility to public transport.

In-centre residential product has been developed in recent years in Chermside and Upper Mount Gravatt, with modest levels of activity also occurring in Toowoomba and Ipswich.

The population of Brisbane CBD has more than trebled between 2001 and 2011 as a result of inner city apartment growth, which has typically appealed to the empty nester market. Empty nesters are typically seeking an active lifestyle with access to a range of entertainment and leisure facilities including dining, theatre/cinema and cycle/walking paths.

4.7 Planning Policy Trends

A well-defined centres hierarchy includes the following elements:

- Central business district (CBD) – The CBD precinct contains the highest order employment, services, community, entertainment and administrative functions of the region in which it serves;
- Range of centre types – The centres hierarchy should allow for a range of retailing and service needs of residents, workers and visitors; and
- Centres offering more than just retail opportunities – Regional and sub-regional centres within the hierarchy should provide a greater range of services than just retailing opportunities.

Features which influence the ultimate performance of centres include:

- Provision of pedestrian friendly environments;
- Allowance for higher density dwelling at centre fringes;
- Public transport linkages;
- Provision of a safe and attractive environment; and
- Provision of public spaces / meeting places.

The development and promotion of successful, vibrant and active centres requires strategic partnerships between government (typically local and state government) and the private sector, in conjunction with other strategic planning documents, such as economic development strategies, urban renewal strategies and transport strategies. More detailed planning, such as master planning / structure planning is critical to the implementation of centre development or revitalisation.

The revitalisation of main street environments follows these eight principles:

- Comprehensive;
- Incremental;
- Self-help;
- Public/private partnership;
- Identifying and capitalising on existing assets;
- Quality;
- Change; and
- Action-oriented.

Retail and commercial activity has become more decentralised in recent years, not only in Moreton Bay RC but elsewhere generally due to the increasing mobility of consumers. Decentralisation has seen to the development of a number of smaller convenience or local based centres within the centres hierarchy.

The SEQ Regional Plan 2009-2031 seeks to promote active, main street environments for established and new centres through Desired Regional Outcome 8 – Compact Settlement, in particular through Principal 8.8:

> Include a broad mix of land uses in activity centres and structure them as mixed-use centres in a predominantly main-street format to best serve their surrounding communities.

Traditional main street environments have been challenged over the last fifty years by the development of enclosed, air-conditioned shopping centres and malls. However, a renewed focus on main street environments is emerging, underpinned by a desire for connectedness: to feel part of a local community with a village atmosphere. Consumers are increasingly opting to shop locally and support local businesses. The local main street should also offer convenience and accessibility for time-poor consumers, who undertake smaller but more frequent shopping trips. Cafes and restaurants are also a prominent component of many main streets, meaning they also function as meeting places for residents, workers and visitors.

In Moreton Bay Regional Council, the most recent major centre development has been at North Lakes, which comprises an enclosed shopping mall, with main street retailing also present.

5 CENTRES NETWORK AND HIERARCHY

5.1 Existing Centres Network

5.1.1 Principal Regional Activity Centres

Caboolture-Morayfield Principal Regional Activity Centre

The Caboolture-Morayfield Principal Regional Activity Centre (PRAC) is intended to be the central focus of activity for Moreton Bay Regional Council and includes retail, commercial and community facilities located on or around Morayfield Road and King Street. The Caboolture-Morayfield PRAC has a total estimated floor space of 235,667m^2 of which an estimated 70.0% is occupied by retail floor space, 15.7% is occupied by commercial floor space and 9.7% is occupied by community facilities and other floor space. There was an estimated 10,790m^2 of vacant floor space identified within the Caboolture-Morayfield PRAC.

The Caboolture-Morayfield PRAC has two major precincts separated by the Caboolture River, namely,

- Morayfield: including Morayfield Shopping Centre (district centre) located at 171 Morayfield Road. Major tenants at the centre include Big W (7,991m^2), Target (7,238m^2) Kmart (6,928m^2), Coles (4,206m^2) and Woolworths (4,112m^2); and
- Caboolture: including Caboolture Park Shopping Centre (district centre) located at 60-78 King Street. The centre is anchored by Kmart (6,785m^2) and Coles Supermarket (4,472m^2).

The balance of the Caboolture-Morayfield PAC has an estimated 161,692m^2 of floor space of which:

- 61.5% is occupied by retail floor space;
- 21.4% is occupied by commercial floor space; and
- 11.0% is occupied by community facilities and other floor space.

There was an estimated 9,876m^2 of vacant floor space identified within the Caboolture – Morayfield PRAC balance.

Table 5.1: Caboolture-Morayfield Principal Regional Activity Centre

Centre Name	Caboolture-Morayfield PRAC		Morayfield Shopping Centre		Caboolture Park Shopping Centre		Caboolture-Morayfield PRAC Balance	
<u>Major Tenants</u>								
			Big W	$7,991m^2$	Kmart	$6,785m^2$	Woolworths	$3,634m^2$
			Target	$7,238m^2$	Coles	$4,742m^2$		
			Kmart	$6,928m^2$				
			Coles	$4,206m^2$				
			Woolworths	$4,112m^2$				
	Area	**% of Total**	**Area**	**% of Total**	**Area**	**% of Total**	**Area**	**% of Total**
Groceries	23,367	9.9%	8,672	14.6%	4,995	34.1%	9,700	6.0%
Dept. Store/DDS	31,841	13.5%	22,157	37.4%	6,785	46.3%	2,899	1.8%
Take-away and dining[1]	6,087	2.6%	1,255	2.1%	101	0.7%	4,731	2.9%
Specialty[2]	37,167	15.8%	16,403	27.7%	1,117	7.6%	19,647	12.2%
Core Bulky	19,209	8.2%	852	1.4%	90	0.6%	18,267	11.3%
Ancillary Bulky	35,080	14.9%	3,140	5.3%	0	0.0%	31,940	19.8%
Hardware	12,222	5.2%	0	0.0%	0	0.0%	12,222	7.6%
Vacant/For Lease	**10,790**	**4.6%**	**503**	**0.8%**	**411**	**2.8%**	**9,876**	**6.1%**
Total Retail	**164,974**	**70.0%**	**52,480**	**88.5%**	**13,088**	**89.3%**	**99,406**	**61.5%**
Total Commercial	**37,068**	**15.7%**	**1,229**	**2.1%**	**1,160**	**7.9%**	**34,680**	**21.4%**
Community Facilities and Other	**22,835**	**9.7%**	**5,104**	**8.6%**	**0**	**0.0%**	**17,731**	**11.0%**
Total	**235,667**	**100.0%**	**59,316**	**100.0%**	**14,659**	**100.0%**	**161,692**	**100.0%**

Note 1: including on premise liquor
Note 2: includes clothing, personal and other goods & take-away liquor.

5.1.2 Major Regional Activity Centres

Strathpine Major Regional Activity Centre

Strathpine Major Regional Activity Centre (MRAC) has a total estimated floor space of $111,465m^2$ and includes:

- Westfield Strathpine (district centre) located at 295 Gympie Road with an estimated floor space of $44,743m^2$. Major tenants at the centre include Big W ($7,791m^2$), Target ($5,634m^2$) Woolworths ($4,100m^2$), Coles ($3,277m^2$), Aldi ($1,484m^2$) and Best & Less ($1,146m^2$).
- Strathpine Plaza Shopping Centre;
- Strathpine Central;
- Brendale IGA and
- Other business activities located along Gympie Road.

Of the $111,465m^2$ of floor space in Strathpine MRAC:

- 66.6% of total floor space is retail;
- 22.9% of total floor space is commercial; and

- 7.4% of total floor space is community facilities and other tenancies.

There was an estimated 3,511m^2 of vacant floor space identified within the Strathpine MRAC.

North Lakes Major Regional Activity Centre

North Lakes MRAC includes an estimated 116,588m^2 of floor space focused around Westfield North Lakes (district centre). Within North Lakes MRAC:

- Retail tenancies account for approximately 69.9% of total floor space;
- Commercial tenancies for 18.3% of total floor space; and
- Community facilities and other tenancies for 6.9% of total floor space.

Vacancies accounted for an estimated 5,606m^2 of vacant floor space within North Lakes MRAC.

Westfield North Lakes is located on the corner for Anzac Avenue and North Lakes Drive, North Lakes. The centre has an estimated 61,452m^2 of floor space, the majority of which is occupied by retail tenancies. Major tenants at the centre include:

- Myer (12,128m^2): notably the only department store within Moreton Bay RC;
- Big W (8,580m^2);
- Target (7,157m^2);
- Woolworths (4,049m^2);
- Coles (3,609m^2);
- Aldi (1,349m^2); and
- Best & Less (1,202m^2).

Redcliffe - Kippa Ring Major Regional Activity Centre

Redcliffe – Kippa Ring MRAC includes Peninsula Fair (district centre) and businesses located along Anzac Avenue at Kippa Ring and along Redcliffe Parade and Anzac Avenue at Redcliffe. Redcliffe – Kippa Ring MRAC has an estimated 106,657m^2 with approximately:

- 65.1% of total floor space occupied by retail tenancies;
- 23.5% of total floor space occupied by commercial tenancies; and
- 5.7% of total floor space occupied by community facilities and other tenancies.

There was an estimated 6,097m^2 of vacant tenancies identified in Redcliffe – Kippa Ring MRAC.

Peninsula Fair is located at 272 Anzac Avenue, Kippa Ring and has an estimated 30,733m^2 of floor space. The major tenants at the centre were Kmart (8,960m^2), Coles (4,386m^2) and Best & Less (847m^2). The centre also includes a cinema.

Other major tenants within the Redcliffe – Kippa Ring MRAC include:

- Woolworths (2,400m^2) within Kippa-Ring Village Shopping Centre;
- Aldi (1,334m^2) located on Anzac Avenue;
- Woolworths (3,941m^2) located within Bluewater Square; and

- Coles (1,160m^2) on Sutton Street.

Table 5.2: Major Regional Activity Centres within Moreton Bay Regional Council

Centre Name	Strathpine		North Lakes		Redcliffe - Kippa Ring	
Major Tenants						
	Big W	7,791m^2	Myer	12,128m^2	Kmart	8,960m^2
	Target	5,634m^2	Big W	8,580m^2	Coles	4,386m^2
	Woolworths	4,100m^2	Target	7,157m^2	Best & Less	847m^2
	Coles	3,277m^2	Woolworths	4,049m^2	Woolworths	2,400m^2
	Aldi	1,484m^2	Coles	3,609m^2	Aldi	1,334m^2
	Best & Less	1,146m^2	Aldi	1,349m^2	Woolworths	3,941m^2
			Best & Less	1,202m^2	Coles	1,160m^2
	Area	**% of Total**	**Area**	**% of Total**	**Area**	**% of Total**
Groceries	13,194	11.8%	10,247	8.8%	15,100	14.2%
Dept. Store/DDS	14,571	13.1%	27,865	23.9%	8,960	8.4%
Take-away and dining[1]	8,386	7.5%	8,835	7.6%	17,593	16.5%
Specialty[2]	25,109	22.5%	18,032	15.5%	23,368	21.9%
Core Bulky	7,368	6.6%	988	0.8%	1,874	1.8%
Ancillary Bulky	3,866	3.5%	1,556	1.3%	2,506	2.3%
Hardware	1,695	1.5%	14,000	12.0%	0	0.0%
Vacant/For Lease	**3,511**	**3.2%**	**5,606**	**4.8%**	**6,097**	**5.7%**
Total Retail	**74,187**	**66.6%**	**81,522**	**69.9%**	**69,400**	**65.1%**
Total Commercial	**25,516**	**22.9%**	**21,364**	**18.3%**	**25,026**	**23.5%**
Community Facilities and Other	**8,250**	**7.4%**	**8,096**	**6.9%**	**6,134**	**5.8%**
Total	**111,465**	**100.0%**	**116,588**	**100.0%**	**106,657**	**100.0%**

Note 1: including on premise liquor
Note 2: includes clothing, personal and other goods & take-away liquor.

5.1.3 District Centres

Arana Hills District Centre

Arana Hills District Centre has an estimated floor space of 21,451m^2 and includes Arana Hills Plaza and businesses located along Patricks Road, Dawson Parade and Nepean Avenue. The majority of the Arana Hills District Centre is occupied by retail tenancies (84.2%). There was an estimated 1,214m^2 of vacant floor space identified.

Arana Hills Plaza is located at 5 Patricks Road, Arana Hills and has an estimated floor space of 12,834m^2. Major tenants within Arana Hills Plaza include Kmart (6,526m^2) and Coles (3,143m^2).

Albany Creek District Centre

Albany Creek District Centre comprises:

- Albany Creek Shopping Centre: anchored by Coles (4,874m^2);
- Albany Marketplace: anchored by Woolworths (3,498m^2); and
- Strip retail along Albany Creek Road.

Albany Creek District Centre has a total floor space of approximately 26,049m^2 of which:

- 67.2% is occupied by retail tenancies;

- 24.9% is occupied by commercial tenancies; and
- 8.0% is occupied by community facilities and other floor space.

There was an estimated 972m^2 of vacant floor space identified within Albany District Centre.

Petrie Village District Centre

The Petrie Village District Centre includes Petrie Village Centre (anchored by a 3,095m^2 Woolworths) and businesses outside Petrie Village located on Dayboro Road. There is an estimated 10,281m^2 of floor space within the Petrie Village District Centre of which:

- 77.7% is occupied by retail tenancies;
- 12.8% is occupied by commercial tenancies; and
- 9.5% is occupied by community facilities and other tenancies.

There was approximately 1,159m^2 of vacant tenancies identified within the Petrie Village District Centre.

Kallangur District Centre

Kallangur District Centre has an estimated floor space of 28,148m^2 and includes:

- Kallangur Fair located at 1477 Anzac Avenue and anchored by Woolworths (3,247m^2);
- Aldi Centre located on Goodfellows Road anchored by Aldi (1,485m^2); and
- Surrounding businesses located on Anzac Avenue.

Approximately 69.4% of the district centre is occupied by retail tenancies with 20.7% of floor space occupied by commercial tenancies and 9.9% occupied by community facilities and other tenancies. There was an estimated 1,858m^2 of vacant floor space within the Kallangur District Centre.

Deception Bay Shopping Centre

Deception Bay Shopping Centre is located on the corner of Deception Bay Road and Bay Avenue. The centre has an estimated floor space of 26,031m^2 with major tenants including Woolworths (3,807m^2) and IGA Supermarket (1,964m^2).

The majority of floor space within Deception Bay Shopping Centre is occupied by retail tenancies (88.9% of total floor space). There were no vacant tenancies identified within the centre.

Burpengary District Centre

Burpengary District Centre has an estimated floor space of 30,809m^2 with retail tenancies accounting for approximately two-thirds of floor space. The centre includes:

- Burpengary Central (4,671m^2) anchored by Coles (3,511m^2);
- Burpengary Plaza (6,704m^2) anchored by Woolworths (3,645m^2); and
- Surrounding businesses located on Station Road including Aldi (1,360m^2).

There was an estimated 3,947m^2 of vacant floor space identified within Burpengary District Centre.

Bellara District Centre

Bellara District Centre includes Bribie Island Shopping Centre and tenancies along Benabrow Avenue and Goodwin Drive. The centre has an estimated 21,512m^2 of floor space of which:

- 66.7% is occupied by retail tenancies;
- 24.2% occupied by commercial tenancies; and
- 3.9% occupied by community facilities and other tenancies.

There was an estimated 1,104m^2 of vacant floor space identified within the Bellara District Centre. The major tenants within the district centre are Woolworths (3,784m^2) and Target (3,416m^2) located within Bribie Island Shopping Centre.

Warner Village District Centre

Warner Village District Centre includes Warner Village Shopping Centre (6,998m^2 anchored by Woolworths: 3,296m^2) located on the corner of Old North Road and Samsonvale Road and surrounding businesses. The district centre has a total floor space of approximately 10,403m^2 of which:

- 77.9% occupied by retail tenancies;
- 12.5% occupied by commercial tenancies; and
- 9.6% occupied by community facilities and other.

There was 139m^2 of vacant floor space identified within the Warner Village District Centre.

Margate District Centre

The Margate District Centre includes Margate Village Shopping Centre (anchored by Woolworths 3,414m^2) and strip retail along Oxley Avenue. The district centre has a total estimated floor space of 23,800m^2 of including:

- Retail tenancies: 51.8% of total floor space
- Commercial tenancies: 27.7% of total floor space; and
- Community facilities and other: 13.0% of total floor space.

There was 1,770m^2 of vacant floor space identified within the Margate District Centre.

Table 5.3: District Centres within Moreton Bay Regional Council

Centre Name	Arana Hills		Albany Creek		Petrie Village		Kallangur		Deception Bay		Burpengary		Bellara		Warner		Margate	
Major Tenants																		
	Kmart	6,526m^2	Coles	4,874m^2	Woolworths	3,095m^2	Woolworths	3,247m^2	Woolworths	3,807m^2	Coles	3,511m^2	Woolworths	3,784m^2	Woolworths	3,296m^2	Woolworths	3,414m^2
	Coles	3,143m^2	Woolworths	3,498m^2			Aldi	1,485m^2	IGA	1,964m^2	Woolworths	3,645m^2	Target	3,416m^2				
											Aldi	1,360m^2						
Category	**Area**	**% of Total**	**Area**	**% of Total**	**Area**	**% of Total**	**Area**	**% of Total**	**Area**	**% of Total**	**Area**	**% of Total**	**Area**	**% of Total**	**Area**	**% of Total**	**Area**	**% of Total**
Groceries	3,798	17.7%	8,917	34.2%	3,152	30.7%	5,804	20.6%	7,820	30.0%	9,744	31.6%	4,089	19.0%	3,628	34.9%	4,294	18.0%
Dept. Store/DDS	6,526	30.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	3,416	15.9%	0	0.0%	0	0.0%
Take-away and dining[1]	3,175	14.8%	2,697	10.4%	1,479	14.4%	5,495	19.5%	3,510	13.5%	2,268	7.4%	1,199	5.6%	3,257	31.3%	2,090	8.8%
Specialty[2]	3,089	14.4%	5,460	21.0%	2,605	25.3%	6,450	22.9%	11,394	43.8%	5,527	17.9%	4,263	19.8%	1,224	11.8%	4,385	18.4%
Core Bulky	84	0.4%	321	1.2%	374	3.6%	450	1.6%	0	0.0%	1,682	5.5%	120	0.6%	0	0.0%	736	3.1%
Ancillary Bulky	1,130	5.3%	100	0.4%	375	3.6%	395	1.4%	420	1.6%	1,698	5.5%	208	1.0%	0	0.0%	835	3.5%
Hardware	268	1.2%	0	0.0%	0	0.0%	930	3.3%	0	0.0%	0	0.0%	1,056	4.9%	0	0.0%	0	0.0%
Vacant/For Lease	**1,214**	**5.7%**	**972**	**3.7%**	**1,159**	**11.3%**	**1,858**	**6.6%**	**0**	**0.0%**	**3,947**	**12.8%**	**1,104**	**5.1%**	**139**	**1.3%**	**1,770**	**7.4%**
Total Retail	**18,070**	**84.2%**	**17,495**	**67.2%**	**7,986**	**77.7%**	**19,524**	**69.4%**	**23,144**	**88.9%**	**20,919**	**67.9%**	**14,350**	**66.7%**	**8,109**	**77.9%**	**12,340**	**51.8%**
Total Commercial	**2,791**	**13.0%**	**6,481**	**24.9%**	**1,318**	**12.8%**	**5,838**	**20.7%**	**2,395**	**9.2%**	**4,162**	**13.5%**	**5,211**	**24.2%**	**1,298**	**12.5%**	**6,598**	**27.7%**
Community Facilities and Other	**590**	**2.8%**	**2,073**	**8.0%**	**977**	**9.5%**	**2,786**	**9.9%**	**492**	**1.9%**	**1,781**	**5.8%**	**847**	**3.9%**	**996**	**9.6%**	**3,092**	**13.0%**
Total	**21,451**	**100.0%**	**26,049**	**100.0%**	**10,281**	**100.0%**	**28,148**	**100.0%**	**26,031**	**100.0%**	**30,809**	**100.0%**	**21,512**	**100.0%**	**10,403**	**100.0%**	**23,800**	**100.0%**

Note 1: including on premise liquor
Note 2: includes clothing, personal and other goods & take-away liquor.

5.1.4 Local Centres

There were approximately 100 local centres identified within Moreton Bay Regional Council, ranging from 80m^2 (Oakey Flat Road) to 20,953m^2 (Deception Bay Road). Table 5.4 below provides a summary of these centres.

Table 5.4: Local Centres within Moreton Bay Regional Council

Centre Name	Address	Floor Space (sqm)	Tenants
Albany Place	Cnr Keong Road & Albany Creek Road, Albany Creek	4,907	Aldi (1,100m^2) is the major tenant at the centre with other tenants including convenience retail and commercial tenancies.
Radius Medical Centre	Cnr Keong Road & Old Northern Road, Albany Creek	3,261	The centre has a focus on medical related tenancies. There is also a veterinary and childcare at the centre.
Woolworths Market Place, Albany Creek	Cnr Albany Forest Drive & Old Northern Road, Albany Creek	4,861	The centre is anchored by Woolworths (3,498m^2) with other tenancies focused on convenience retail and commercial.
Dawn Road Local Centre	Dawn Road, Albany Creek	1,965	The centre includes Spar Supermarket, specialty retail and a childcare.
Bellara Corner Store	Bellara Street , Bellara	120	The centre includes Bellara Corner Store (vacant at the time of inspection, October 2012) and a hair salon.
Bribie Island Hotel	Sylvan Beach Esplanade, Bellara	880	Bribie Island Hotel and Liquorland Bottleshop.
Bongaree	First Avenue, Bongaree	5,791	Includes strip retail along First Avenue.
Woorim	North Street, Woorim	4,662	Includes strip retail along North Street.
Welsby Parade Shops	Welsby Parade, Bongaree	4,498	Includes Supa IGA (1,200m^2) and convenience retail and commercial tenancies.
Cotterill Shops	Cotterill Avenue, Bongaree	241	Comprises two take-away food tenants.
Aldi Centre - Bribie Island	Goodwin Drive, Bongaree	2,100	Anchored by Aldi (1,400m^2) the centre includes six retail shops and one commercial tenancy.
Coolgarra Shops	Cnr Cotterill Avenue & Goodwin Drive, Bongaree	1,523	The centre includes three grocery tenants, a take-away food store and hardware.
Currong Shops	Currong Crescent, Bellara	569	There are two retail tenancies located on Currong Crescent.
Elkhorn Avenue	Elkhorn Avenue, Bellara	114	Small standalone tattoo shop.
Marine Parade	Marine Parade, Bellara	387	There are four café and seaside related stores located on Marine Parade.
Banksia Beach Shopping Village	Sunderland Drive, Banksia Beach	4,943	Anchored by IGA (2,766m^2) the centre has eight convenience retail tenancies and a commercial tenancy.
FoodWorks Burpengary	Cnr Burpengary Road & Henderson Road, Burpengary	990	The centre includes FoodWorks and three retail tenancies.
Oakey Flat Road	Oakey Flat Road, Morayfield	80	There is a BP Service Station with a café on Oakey Flat Road.

Centre Name	Address	Floor Space (sqm)	Tenants
Woodpecker Tavern	Cnr Rowley Road & Facer Road, Burpengary	729	Includes Woodpecker Tavern and Liquorland Bottleshop.
Narangba Village	32-36 Main Street, Narangba	1,819	The centre includes fifteen convenience retail and commercial tenancies.
Narangba Station Plaza	Main Street, Narangba	888	The centre includes convenience retail and commercial and a day care centre and a veterinary surgery.
Chooks Corner	Mackie Road, Narangba	805	Chooks Corner has five convenience retail tenancies, one of which was identified as vacant.
Narangba Valley Shopping Centre	Young Road, Narangba	3,090	The centre is anchored by Woolworths (2,000m^2) and has 10 specialty shops.
The Big Fish Tavern	Bruce Highway, Caboolture	470	The Big Fish Tavern is the site for the Sungate Business Park which will include retail, commercial and industrial and will be anchored by Woolworths.
Tullawong Corner Store	Parish Road, Caboolture	350	There is a small convenience store located on Parish Road in close proximity to a child care centre on Smiths Road.
Lear Jet Centre	Lear Jet Drive, Caboolture	2,653	The centre includes six retail tenancies and two commercial tenancies. There was a vacant tenancy at the time of inspection.
Argyll Street Centre	Argyll Street, Caboolture	277	Includes three convenience retail stores.
Bellmere Shopping Centre	Bellmere Road, Bellmere	848	The centre has eight convenience retail tenancies one of which was vacant at the time of inspection.
Central Lakes Shopping Village	Cnr McKean Street & Pettigrew Street, Caboolture	5,699	The centre is anchored by Woolworths (3,575m^2) and has ten convenience retail and three commercial tenancies.
Trader Dukes Centre	King Street, Caboolture	1,930	The centre includes Trader Dukes Tavern and eleven convenience retail tenancies.
Woodford Shopping Centre	73-75 Archer Street, Woodford	4,962	The centre is relatively new (opened in 2009) and is anchored by Woolworths (3,668m^2). There are ten specialty retail tenancies within the centre.
Woodford Central Shopping Centre	Archer Street, Woodford	1,956	The centre includes Supa IGA (1,344m^2) and three convenience retail tenancies.
Woodford Strip Retail	Archer Street, Woodford	7,067	Strip retail along Archer Street at Woodford includes a variety of convenience retail and commercial tenancies.
D'Aguilar	D'Aguilar Highway, D'Aguilar	1,114	Located along the D'Aguilar Highway at D'Aguilar are the D'Aguilar Hotel, a bottleshop, corner store and petrol station.

Centre Name	Address	Floor Space (sqm)	Tenants
Wamuran	D'Aguilar Highway, Wamuran	1,983	The centre includes two hair salons, a pharmacy, a real estate agent and a fitness centre. Strip retail along the D'Aguilar Highway at Wamuran includes eleven convenience retail tenancies, a medical centre and veterinary.
Elimbah	Beerburrum Road, Elimbah	640	Eight of ten tenancies were vacant at the time of inspection (October 2012). There are a clothes store and newsagent within the centre.
Excelsior Park Village	Cnr Oakey Flat Road & Nairn Road, Morayfield	550	The centre includes a convenience food store, bottleshop and a combined bakery and café.
Bunya Park Drive Convenience Centre	Bunya Park Drive, Eatons Hill	2,400	The centre includes six retail tenancies and four commercial tenancies.
Eatons Hill Convenience Centre	Cnr Eatons Crossing Road & Queen Elizabeth Drive, Eatons Hill	1,203	The centre includes a convenience food store, five convenience retail stores, a medical centre and a dentist.
Eatons Hill Hotel and Function Centre	646 South Pine Road, Eatons Hill	7,365	The centre includes the Eatons Hill Hotel, a bottleshop, a function centre and a motel.
Ningi	Caboolture-Bribie Island Road, Ningi	1,531	Ningi floor space includes retail and commercial tenancies spread out along Caboolture-Bribie Island Road at Ningi. In total there are thirteen convenience retail tenancies, and five commercial tenancies.
The Village Sandstone Point	204-208 Bestmann Road East, Sandstone Point	3,004	The centre is anchored by IGA (1,252m^2) and includes seven convenience retail tenancies, a medical centre and a real estate agent.
Beachmere Plaza	Beachmere Road, Beachmere	3,001	The centre includes ten convenience retail tenancies, a medical centre, real estate agent and childcare centre.
Toorbul	Cnr Freeman Road & The Esplanade, Toorbul	516	There is a tavern, bottle and small convenience store at Toorbul.
Donnybrook	Alice Street, Donnybrook	316	There is a small store on Alice Street, Donnybrook that includes post office, boat hire, food store and plumbing service.
Anzac Avenue Local Centre	Anzac Avenue, Kallangur	1,776	The centre includes eight retail tenancies and a veterinary surgery. There was one vacant tenancy identified at the centre.
Kallangur Village Shopping Centre	Cnr Marsden Road & Ann Street, Kallangur	733	The centre includes Spar Express, a bottleshop and a childcare.
Lilly Brook Shopping Village	980 Brickworks Road, Kallangur	7,244	The centre is anchored by Coles (3,956m^2) and includes eleven convenience retail tenancies, a medical centre and a real estate agent.
Murrumba Downs Shopping Centre	Cnr Goodrich Road & Dohles Rocks Road, Murrumba Downs	6,534	The centre is anchored by Coles (2,563m^2) and has twelve convenience retail tenancies, a medical centre and two real estate agents.

Centre Name	Address	Floor Space (sqm)	Tenants
Castle Hill Centre	Cnr Castle Hill Drive & Dohles Rocks Road, Murrumba Downs	2,703	The centre includes ten convenience retail tenancies, a medical centre and a real estate agent. There was a building under construction at the time of inspection (October 2012).
Dakabin Village	Whitehorse Road, Dakabin	1,083	Comprises a Spar Supermarket and childcare centre.
Bayview Shops	Bayview Terrace, Deception Bay	975	The centre includes a restaurant, café, real estate agent and the Deception Bay Library.
Deception Bay Strip Retail	Deception Bay Road, Deception Bay	20,953	There's extensive strip retail along Deception Bay Road at Deception Bay with tenants including Aldi (1,440m^2), Dan Murphy's (1,250m^2) and Fernwood Gym (1,196m^2).
Zone Rothwell	757 Deception Bay Road, Rothwell	11,088	Zone Rothwell is a bulky goods centre with major tenants including Rays Outdoor Furniture (1,851m^2) and Amart All Sports (1,157m^2). There were five vacant tenancies identified at the time of inspection (October 2012).
Bay Markets	Deception Bay Road, Deception Bay	1,000	The centre includes seven convenience retail tenancies and three commercial tenancies.
Bunnings Rothwell & Harvey Norman Centre	Deception Bay Road, Rothwell	17,682	Bunnings is located on Deception Bay Road (11,680m^2) adjacent Harvey Norman, Good Price Pharmacy, and Pet Barn.
Deception Bay IGA	Bailey Road, Deception Bay	2,336	The centre is anchored by IGA (1,398m^2) and includes eight convenience retail tenancies.
Rothwell Local Centre	Deception Bay Road, Rothwell	2,060	The centre includes eight retail tenancies, a medical centre and a back.
Burpengary Tavern	Cnr Bruce Highway & Old Bay Road, Burpengary	762	The centre lies to the east of the Bruce Highway and includes Burpengary Tavern and a bottleshop.
Redcliffe Leagues Club	Cnr Klingner & Ashmole Roads, Redcliffe	8,398	Redcliffe Leagues Club includes the Dolphins Health Precinct and is the site for the Dolphins Central Shopping Centre.
North Rise	Lipscombe Road, Deception Bay	1,580	The centre includes Spar supermarket, a bakery, bottleshop, hair salon, childcare centre and medical centre.
North Bay Shopping Centre	Zammit Street, Deception Bay	952	The centre includes a convenience store, four specialty retail tenancies, and two community facilities and other tenancies. There were two vacant tenancies identified at the centre.
North Lakes Convenience Centre	Cnr Discovery Drive & College Street, North Lakes	1,149	The centre comprises eight retail tenancies, including Night Owl convenience centre and five dining and take-away food stores, and two commercial tenancies. At the time of inspection there was a vacant tenancy identified.
Astley Parade Local Centre	Astley Parade, North Lakes	5,350	The centre is anchored by IGA supermarket (2,506m^2) and includes three retail tenancies and two commercial tenancies.

Centre Name	Address	Floor Space (sqm)	Tenants
Ferny Way South	Ferny Way, Ferny Hills	4,379	There are a number of tenancies located on both sides of Ferny Way near the intersection of Gordon Road. In total there are 27 businesses including twelve retail tenancies, eleven commercial tenancies and two community facilities and other tenancies. There were two vacant tenancies at the time of inspection (October 2012).
Mt Glorious	Mount Glorious Road, Mt Glorious	355	Within Mount Glorious there are the Mount Glorious Teahouse, a café and a commercial tenancy.
Arlington Court	Cnr Arlington Drive & Bunya Road, Arana Hills	820	Retail on Arlington Drive includes a convenience store, three convenience retail tenancies and a childcare centre. There was one vacant tenancy identified at the centre.
Everton Shopping Village	Camelia Avenue, Everton Hills	1,666	The centre includes nine retail tenancies, three commercial tenancies and veterinary clinic.
Chinook Street Local Centre	Chinook Street, Everton Hills	2,588	The centre includes three tenancies associated with health and fitness and a take-away food tenancy.
Ferny Way Local Centre	Ferny Way, Ferny Hills	478	The centre includes a deli, fruit market and a mower store.
170 Patricks Road	170 Patricks Road, Arana Hills	952	The centre includes six retail tenancies and three commercial tenancies. There was a vacant tenancy identified within the centre.
Fernlands Village	Woodhill Road, Ferny Hills	1,389	The centre includes Spar convenience store, three dining and take-away stores, a hair salon, bottleshop, medical centre, dentist and veterinary clinic.
Everton Hills Shopping Centre	Cnr South Pine & Queens Roads, Everton Hills	2,427	The centre includes four retail tenancies, a medical centre, and a dentist. There was one vacant tenancy identified at the centre.
Samford Village Main Street Retailing	Main Street, Samford Village	7,743	Strip retail along Main Street at Samford Village includes approximately 35 retail tenancies, 17 commercial tenancies and one community facilities and other tenancy.
Samford Central	Main Street, Samford Village	2,397	The centre includes Supa IGA (800m^2), twelve convenience retail tenancies and four commercial tenancies. At the time of inspection (October 2012) there was one vacant tenancy identified.
Samford Country Centre	Main Street, Samford Village	1,012	The centre includes nine retail tenancies and two commercial tenancies. There was one vacant tenancy identified at the centre at the time of inspection (October 2012).
Samford Valley	Mount Glorious Road, Samford Valley	2,414	There are five retail tenancies with a focus on gardening and landscaping and one commercial tenancy located along Mount Glorious Road.

Centre Name	Address	Floor Space (sqm)	Tenants
Francis Road Local Centre	Francis Road, Bray Park	1,343	The centre includes FoodWorks convenience centre, a hair salon, bottleshop, two take-away food stores and a childcare centre.
Ebert Place Shops	Ebert Parade, Lawnton	1,938	The centre includes ten retail tenancies, one commercial tenancy and one community facilities and other tenancy. There was one vacant tenancy identified at the centre.
Ellis Street Local Centre	Cnr Ellis Street & Francis Road, Lawnton	504	The centre includes a convenience store, hair salon, bakery, laundromat, take-away food store and a day spa.
Sparkes Road Local Centre	Sparkes Road, Bray Park	729	The centre includes a medical centre, pharmacy and podiatrist.
Kensington Village Shopping Centre	Cnr Kensington Way & Sovereign Avenue, Bray Park	7,043	The centre is anchored by Coles (3,040m^2) and includes eight retail tenancies, a medical centre, dentist and a childcare centre.
The Hub Convenience Centre	Uhlmann Road, Burpengary	4,136	The centre includes nine retail tenancies, five commercial tenancies and a childcare centre.
Parkridge Shopping Village	Parkridge Avenue, Upper Caboolture	1,123	The centre includes FoodWorks convenience centre, bottleshop, hair salon, beauty salon and a lawyers office.
Glenwood Drive Centre	Glenwood Drive, Morayfield	1,205	The centre comprises seven retail tenancies including IGA convenience centre.
Hillcrest Gardens Shopping Centre	Cresthaven Drive, Morayfield	661	The centre includes a combined convenience and take-away food store, bakery, hair salon and a women's clinic.
Dayboro	Williams Street, Dayboro	10,169	Strip retail along Williams Street includes 21 retail tenancies, ten commercial tenancies and four community facilities and other tenancies. There were two vacant tenancies identified at the time of inspection (October 2012).
Beeville Road Local Centre	Beeville Road, Petrie	2,748	The centre is anchored by IGA supermarket (1,427m^2) and includes a bakery, take-away food store, hair salon, bottleshop, video store, pharmacy, veterinary clinic and pathology centre.
Redcliffe IGA	Elizabeth Avenue, Clontarf	6,013	The centre is anchored by Supa IGA (2,257m^2) and includes a bottleshop, video store and four commercial tenancies. There were four vacant tenancies identified at the centre (October 2012).
Redcliffe Coastal Strip Retail	Hornibrook Esplanade, Clontarf	1,832	Retail along Hornibrook Esplanade includes fourteen retail tenancies, three commercial tenancies and three community facilities and other tenancies. There was one vacant tenancy identified on Hornibrook Esplanade.
Clontarf Bayside Plaza	Elizabeth Avenue, Clontarf	2,990	The centre includes nine dining and take-away food stores, a post office, service station and six commercial tenancies including the Redcliffe Super Clinic. There were five vacant tenancies identified at the time of inspection (October 2012).

Centre Name	Address	Floor Space (sqm)	Tenants
Landsborough Avenue Local Centre	Landsborough Avenue, Scarborough	6,829	Strip retail along Landsborough Avenue includes two dining and take-away food tenancies, a newsagent, pharmacy post office, two hair salons and seven commercial tenancies.
Mariners Plaza	Griffith Road, Scarborough	1,090	The centre includes a convenience store, two hair salons, two dining and take-away food stores, a bottleshop and an education centre.
Midways Convenience Centre	Oxley Avenue, Redcliffe	1,395	The centre includes FoodWorks convenience store, a post office, newsagent, butcher, take-away food store, real estate agent and veterinary clinic.
Ashmole Shopping Village	Cnr Ashmole Road & Porter Street, Kippa Ring	890	The centre includes Spar Express, a bakery, take-away food store, pharmacy, hair salon, dry cleaners and a medical centre.
Victoria Avenue Local Centre	Victoria Avenue, Redcliffe	600	The centre includes Friendly Grocer, a bakery, butcher, two take-away food stores, hair salon, newsagent, florist and pawn broker.
Lincoln Centre	Lincoln Lane, Strathpine	1,898	The centre includes twelve retail tenancies with a focus on dining and take-way food stores, and five commercial tenancies. There were two vacant tenancies identified at the centre.
Bell's Corner	Bells Pocket Road, Strathpine	315	The centre includes a hair salon, beauty salon, laundromat and two commercial tenancies.
Sandalwood Shopping Village	Samsonvale Road, Strathpine	642	The centre includes a Friendly Grocer, bakery, butcher, take-away food store and a bottle shop. There were four vacant tenancies identified at the centre.

5.2 Future Centres Hierarchy for Moreton Bay Regional Council

The SEQ Regional Plan 2009-2031 and the Draft Queensland Planning Provisions v3.0 identify five centre types relevant to Moreton Bay Regional Council:

- Principal centres;
- Major centres;
- District centres;
- Local centres; and
- Neighbourhood centres.

Moreton Bay Regional Council's current classification of centres, includes:

- One principal centre;
- Three major centres;
- Eight district centres; and
- A very large number of local centres.

Formulation of a possible future centres hierarchy also considers the Draft Strategic Framework in consideration of the future intent of centres within Moreton Bay Regional Council.

This section reviews the current and future intent of each centre within Moreton Bay Regional Council and provides suggestions as to the appropriate criteria to apply to classify a centre.

5.2.1 Principal Centres

The SEQ Regional Plan 2009-2031 defines a principal activity centre as follows:

> SEQ's principal regional activity centres serve catchments of regional significance and accommodate key employment concentrations. They also serve business, major comparison and convenience retail, and service uses. These centres provide a secondary administrative focus, accommodating regional offices of health, education, cultural and entertainment facilities that have governmental and regional significance. Outside the Brisbane CBD, principal regional activity centres serve as key focal points for regional employment and in-centre regional development. As major trip generators, these centres typically have existing or planned, dedicated public transport, including rail, bus or light rail, and comprise key nodes in the regional public transport system. Residential development densities in principal regional activity centres should be around 40–120 dwellings per hectare (net) or greater. (Source: Department of Infrastructure & Planning (2009), pg 99)

Within Moreton Bay Regional Council, Caboolture – Morayfield is the only principal activity centre.

The Draft Queensland Planning Provisions version 3.0 (released October 2011), outlines the purpose of principal centres as follows:

> The purpose of the principal centre zone code is to provide for the largest and most diverse mix of uses and activities that forms the core of an urban settlement. It includes key concentrations of high-order retail, commercial, employment, residential, health services, administrative, community, cultural, recreational and entertainment activities and other uses, capable of servicing the planning scheme area (in this case Moreton Bay Regional Council). (Source: Growth Management Queensland (2011), pg 93)

Moreton Bay Regional Council's Draft Strategic Framework provides the following definition for both principal and major centres:

> Principal and other Major Regional Activity Centres are major transport hubs that serve catchments of regional and sub-regional significance and accommodate key employment concentrations and include a substantial local residential population. They provide a secondary administrative function to the Brisbane CBD and accommodate regional, district or branch government facilities and professional offices. They are also the preferred locations for tertiary health, education, cultural and entertainment facilities. (Source: Moreton Bay Regional Council (2012b), pg 31)

The Draft Strategic Framework identifies Caboolture-Morayfield as the principal activity centre for Moreton Bay Regional Council.

5.2.2 Major Centres

The SEQ Regional Plan 2009-2031 defines major centres as follows:

> These centres complement the principal regional activity centres by serving catchments of sub-regional significance and accommodating key employment concentrations. They also provide business, service, and major retail and convenience functions. With a secondary, sub-regional administration focus, they accommodate district or branch offices of government facilities, and cultural and entertainment facilities of regional significance. These centres are typically located around key suburban or inter-urban public transport stops, and provide frequent public transport services to link the centre to surrounding communities. Residential development densities in major activity centres should be around 30–80 dwellings per hectare (net) or greater. (Source: Department of Infrastructure & Planning (2009), pg 99)

North Lakes, Redcliffe and Strathpine are the main centres in Moreton Bay Regional Council.

The Draft Queensland Planning Provisions version 3.0 (released October 2011), outlines the purpose of major centres as follows:

> The purpose of the major centre zone code is to provide for a mix of use and activities. It includes concentrations of higher order retail, commercial, offices, residential, administrative and health services, community, cultural and entertainment facilities and other uses capable of servicing a subregion in the planning scheme area (in this case Moreton Bay Regional Council). (Source: Growth Management Queensland (2011), pg 94)

Moreton Bay Regional Council's Draft Strategic Framework assumes that both principal and major regional activity centres have a similar role and function.

Consistent with the SEQ Regional Plan 2009-2031, the Draft Strategic Framework identifies North Lakes, Redcliffe and Strathpine as major activity centres.

5.2.3 District Centres

The Draft Queensland Planning Provisions version 3.0 (released October 2011), outlines the purpose of district centres as follows:

> The purpose of the district centre zone code is to provide for a mix of uses and activities. It includes a mix of land uses including retail, commercial, residential, offices, administrative and health services, community, small-scale entertainment and recreational facilities capable of servicing a district. (Source: Growth Management Queensland (2011), pg 94)

Moreton Bay Regional Council's Draft Strategic Framework provides the following definition for district centres:

> The District Centres are important transport hubs and provide a diverse mix of land uses and activities with a concentration of retail, business, commercial, employment, health services, administrative, community, cultural, recreational and entertainment capable of servicing the district and include a substantial resident population. (Source: Moreton Bay Regional Council (2012b), pg 31)

The Draft Strategic Framework identifies ten district centres within Moreton Bay Regional Council, namely Deception Bay, Margate, Kallangur, Burpengary, Narangba, Petrie, Bellara, Warner, Albany Creek and Arana Hills. The Draft Strategic Framework also identifies the potential for a new district centre within the Caboolture West investigation area.

5.2.4 Local Centres

The Draft Queensland Planning Provisions version 3.0 (released October 2011), outlines the purpose of local centres as follows:

> The purpose of the local centre zone code is to provide for a limited range of land uses and activities to service local needs. It includes local shopping, local employment nodes, commercial, residential, cafes and dining, entertainment, community services and residential development where it can integrate and enhance the fabric of the activity centre, but is not the predominant use. (Source: Growth Management Queensland (2011), pg 95)

The Moreton Bay Region currently has over 100 local centres. Across these 100 local centres there is a significant variation in floor space provision and scale of anchor tenancies. This variation implies that there is also a significant variation in the role and function fulfilled by each of these 100 plus local centres.

5.2.5 Neighbourhood Centres

The Draft Queensland Planning Provisions version 3.0 (released October 2011), outlines the purpose of neighbourhood centres as follows:

> The purpose of the neighbourhood centre zone code is to provide for a small mix of land uses to service residential neighbourhoods. It includes small-scale convenience shopping, professional offices, community services and other uses which directly support the immediate community. (Source: Growth Management Queensland (2011), pg 96)

The Moreton Bay Region currently does not have any neighbourhood centres, but instead designates a large number of small centres as Local Centres.

5.3 Metrics for Principal and Major Centres

5.3.1 Relationship between Population and Principal / Major Centre Provision

There appears to be no clear relationship between local government area population and the number of designated centres in each area (refer to Table 5.5 below).

Notably, Moreton Bay Regional Council has a lower than average provision of principal and major activity centres per 100,000 persons. The provision of principal activity centres is the lowest of all SEQ local governments and its provision of major activity centres the second lowest.

The relatively low provision of higher order centres may have significant implications for the region's ability to increase employment self-containment.

Table 5.5: Comparison of Principal and Major Centre Provision by Local Government Area

Council Area	No. of Principal Activity Centres	No. of Major Activity Centres	Population (2011 ERP)	100,000 persons / Principal Activity Centres	100,000 persons / Major Activity Centres
Brisbane	4	4	1,089,743	2.72	2.72
Gold Coast	2	7	513,954	2.57	0.73
Sunshine Coast	1	7	316,858	3.17	0.45
Moreton Bay	1	3	389,661	3.90	1.30
Logan	2	5	287,517	1.44	0.58
Redland	2	0	143,628	0.72	-
Ipswich	2	2	172,147	0.86	0.86
Scenic Rim	1	1	37,415	0.37	0.37
Somerset	0	3	22,062	-	0.07
Lockyer Valley	1	1	35,795	0.36	0.36
SEQ	16	33	3,008,780	1.88	0.91

Source: Department of State Development, Infrastructure & Planning (2009) and Australian Bureau of Statistics (2012c)

5.3.2 Community Size and Future Job Provision

In the Moreton Bay Regional Council Draft Strategic Framework, future population and employment were identified for each for the five planning areas within the region, and is summarised below in Table 5.6.

Table 5.6: Anticipated Population and Employment within MBRC

Planning Area	Popoulation	Jobs
Caboolture / Morayfield	190,000	80,000
North Lakes / Redcliffe / MBRL	220,000	70,000
Strathpine	108,000	41,000
Bribie & Coastal	43,000	6,000
Rural District	45,000	7,500
Moreton Bay Regional Council	606,000	204,500

Source: Moreton Bay Regional Council (2012b)

Composition of North Lakes / Redcliffe / MBRL Corridor

Currently, the four SLAs of Redcliffe (in Table 5.7) account for approximately 50% of employment within the North Lakes / Redcliffe / Moreton Bay Rail Link (MBRL) corridor. By 2031, it is anticipated that this will fall to 38% of employment with significant employment growth projected for Griffin-Mango Hill, Burpengary-Narangba and Dakabin-Kallangur-Murrumba Downs.

Employment growth within Redcliffe is constrained to some extent due to limited available land, with employment growth to be generated through increased workforces at existing enterprises and infill development.

Analysis shown in Table 5.7 below also highlights that employment within the North Lakes region is anticipated to overtake Strathpine (see Tables 5.6 and 5.7) in terms of employment.

Table 5.7: Anticipated Employment within the North Lakes / Redcliffe / MBRL Precinct

	2011 Employment	2031 Employment	Change
North Lakes	20,458	43,447	22,989
Dakabin-Kallangur-M. Downs	4,666	8,749	4,083
Griffin-Mango Hill	7,113	19,356	12,243
Deception Bay	3,485	4,823	1,338
Burpengary-Narangba	5,194	10,519	5,325
Redcliffe	20,811	26,884	6,073
Clontarf	3,202	3,747	545
Margate-Woody Point	1,928	2,398	470
Redcliffe-Scarborough	8,131	10,264	2,133
Rothwell-Kippa-Ring	7,550	10,475	2,925
Total	41,269	70,331	29,062
Redcliffe as % of total	50.4%	38.2%	

Source: Moreton Bay Regional Council (2012b)

Over 90% of population growth within the North Lakes / Redcliffe / MBRL precinct is anticipated to occur within the North Lakes region, with population increases to be greater in Griffin-Mango Hill (additional 29,766 persons) and Burpengary-Narangba (additional 24,556 persons) (Table 5.8).

Table 5.8: Anticipated Population within the North Lakes / Redcliffe / MBRL Precinct

	2011 Population	2031 Population	Change
North Lakes	99,583	172,693	73,110
Dakabin-Kallangur-M. Downs	28,860	42,367	13,507
Griffin-Mango Hill	21,491	51,257	29,766
Deception Bay	21,912	27,193	5,281
Burpengary-Narangba	27,320	51,876	24,556
Redcliffe	56,570	64,298	7,728
Clontarf	7,947	8,437	490
Margate-Woody Point	10,850	11,889	1,039
Redcliffe-Scarborough	20,434	23,140	2,706
Rothwell-Kippa-Ring	17,339	20,832	3,493
Total	156,153	236,991	80,838
Redcliffe as % of total	36.2%	27.1%	

Source: Moreton Bay Regional Council (2012b)

5.3.3 Existing Principal & Major Centres Network

The Caboolture – Morayfield Principal Regional Activity Centre is currently the dominant centre in terms of floor space provision, with the largest number of full line supermarkets, discount department stores, bulky goods floor space, and the largest concentration of retail floor space, commercial floor space and community facility floor space.

The North Lakes centre has the largest retail floor space provision of all major centres within Moreton Bay Regional Council, and is also the only centre with a department store (Myer). Both North Lakes and Caboolture – Morayfield also have a large format hardware retailer in centre[1].

Table 5.9: Current Provision at Principal Activity Centres and Major Centres within Moreton Bay Regional Council

	No. of Full Line S'mkts	No. of Dept Stores / DDS's	Total Bulky Goods Floor Space (incl H'ware)	Total Retail Floor Space	Total Commercial Floor Space	Total Community Facilities / Other Floor Space
Principal Activity Centre						
Caboolture - Morayfield	4	4	66,512	164,974	37,068	22,835
Major Centres						
Strathpine	3	2	12,928	74,187	25,516	8,250
North Lakes	3	3	16,544	81,522	21,364	8,096
Redcliffe - Kippa Ring	4	1	4,379	69,400	25,026	6,134

Source: Economic Associates inventory

[1] Bunnings is also located within Rothwell and Lawnton.

5.3.4 Existing Community Infrastructure

Existing community infrastructure within principal and major activity centres is shown below in Table 5.10. Caboolture – Morayfield and Redcliffe clearly have the highest level of community infrastructure provision of all centres within Moreton Bay Regional Council.

Table 5.10: Summary of Community Facilities Provision across existing Principal and Major Activity Centres

Caboolture - Morayfield	• Caboolture Hub (4 Hasking Street, Caboolture): An integrated facility which incorporates the Caboolture Library, Caboolture Regional Art Gallery, Learning & Business Centre (offers a conference room and seminar rooms for hire) and Creative Studios (short term leases available at subsidised prices for artists in new media arts and contemporary arts practice); • Caboolture Private Hospital (McKean Street, Caboolture); • Caboolture Public Hospital (McKean Street, Caboolture); • Caboolture Community Health Centre (McKean Street, Caboolture); • Queensland University of Technology (80-106 Tallon Street, Caboolture); • Brisbane North Institute of TAFE (Tallon Street, Caboolture); • Showgrounds at Old Gympie Road, Caboolture; • Caboolture Swimming Pool (King Street, Caboolture); • Moreton Bay Regional Council customer service centre (2 Hasking Street, Caboolture);
Strathpine	• Pine Rivers Gallery (7/199 Gympie Road, Strathpine); • Strathpine Library (corner of Gympie and South Pine Roads, Strathpine); • Moreton Bay Regional Council customer service centre (220 Gympie Road, Strathpine); • Pine Rivers Community Health Centre (568 Gympie Road, Strathpine);
North Lakes	• North Lakes Aquatic Leisure Centre (9 The Corso, North Lakes); • North Lakes Library (5 Discovery Drive, North Lakes); • North Lakes Health Precinct (9 Endeavour Boulevard, North Lakes); • The Corso: Under Construction (The Corso, North Lakes);
Redcliffe	• Redcliffe City Gallery (407-476 Oxley Avenue, Redcliffe); • Redcliffe Cultural Centre (Downs Street, Redcliffe); • Showgrounds at Scarborough Road, Redcliffe; • Brisbane North Institute of TAFE (64-68 Klingner Road, Redcliffe); • Redcliffe War Memorial Pool (Sydney Street, Redcliffe); • Settlement Cove Lagoon (Redcliffe Parade, Redcliffe); • Redcliffe Library (470-476 Oxley Avenue, Redcliffe); • Moreton Bay Regional Council customer service centre (Irene Street, Redcliffe)

Existing community infrastructure within lower order centres includes:

- Arana Hills
  - Arana Hills Library (Narellan Park, Arana Hills);
- Albany Creek
  - Albany Creek Leisure Centre (Old Northern Road, Albany Creek);
  - Albany Creek Library (16 Ferguson Street, Albany Creek);
- Kallangur
  - Kallangur Library (1480 Anzac Avenue, Kallangur);

- Deception Bay
  - Deception Bay Aquatic & Fitness Centre (Maine Terrace, Deception Bay);
  - Deception Bay Library (corner Captain Cook Parade & Bayview Terrace, Deception Bay);
- Burpengary
  - Caboolture Regional Aquatic Leisure Centre (1 Aquatic Centre Drive, Burpengary);
  - Burpengary Library (121 Station Road, Burpengary);
- Bribie Island
  - Bribie Island Aquatic Leisure Centre (Goodwin Drive, Bribie Island); and
  - Bribie Island Library (corner First Avenue & Welsby Parade, Bongaree).

No community infrastructure was identified at Petrie or Warner.

5.3.5 Infrastructure Projects

The South East Queensland Regional Plan 2009-2031 identifies a number of key infrastructure projects that will support the delivery of the SEQ Regional Plan, including:

- The Houghton Highway duplication and bus priority;
- The Lawnton to Petrie third rail track (Moreton Bay Rail Link);
- The Petrie to Redcliffe rail corridor;
- The North Lakes Health Precinct;
- The Caboolture Health Precinct; and
- Upgrades to the Redcliffe Aquatic Centre.

The Moreton Bay Rail Link will significantly improve accessibility to North Lakes, which is currently serviced only by bus routes. Other key infrastructure projects identified above would provide significant benefits to Redcliffe and North Lakes, but none would directly benefit Strathpine.

North Lakes will soon have additional community infrastructure with development of The Corso at North Lakes, which will incorporate a library twice the size of the existing library, a community centre, a young persons space and 4,000m^2 of commercial offices.

The Strathpine Gateway project, which will be located next to Council's Strathpine offices, will include the Strathpine Library and other community spaces. It will also link Strathpine train station to the surrounding retail precinct.

5.3.6 Summary

Within SEQ, Moreton Bay RC has a low provision of higher order centres relative to the other local governments. This may have implications for the region's ability to increase employment self-containment.

Of the higher order centres, Caboolture – Morayfield PRAC currently has the largest provision of floor space and the highest provision of full-line supermarkets, and department and discount department stores within Moreton Bay RC. Furthermore Caboolture – Morayfield includes

Caboolture Hub, private and public hospital, community health centre, tertiary education, showgrounds, swimming pool and a service centre. Caboolture – Morayfield also serves as an inter-regional public transport hub.

North Lakes MRAC currently has the second highest provision of floor space and the only department store within the region (Myer). North Lakes MRAC has strong growth prospects (as shown in Table 2.2 of the report) and a number of development approvals (refer to Table 2.6 above). Community facility provision within North Lakes currently includes an aquatic centre, library and health precinct with future projects including Corso at North Lakes.

Redcliffe MRAC and Strathpine MRAC currently have a high provision of floor space and community facilities, but only limited population and employment growth prospects. As such, these centres do not have the same capacity to grow into principal regional activity centres as North Lakes.

5.4 Proposed Centres Hierarchy

5.4.1 Principal Centres

Based on the above analysis, it is recommended that both Caboolture – Morayfield and North Lakes are designated as Principal Centres.

It is evident from the analysis contained in sections 5.3.1 to 5.3.5 that Caboolture – Morayfield will remain the principal employment centre within Moreton Bay Regional Council and have the highest level of retail and community facility provision. Any future department store provision within Moreton Bay Regional Council should be directed to either the Caboolture – Morayfield principal activity centre or North Lakes principal activity centre.

North Lakes is the only centre within Moreton Bay Regional Council to have a department store (Myer) and also the recently approved site for Queensland's first Costco. Employment within the North Lakes district is anticipated to more than double over the next twenty years to over 40,000 persons, with the population within the region to reach almost 173,000 persons. As its population grows North Lakes is likely to have a growing community sector. For all of these reasons North Lakes is logical as a principal activity centre.

5.4.2 Major Centres

The Redcliffe – Kippa Ring area has a broad range of community facilities, mainly as a result of previous local government boundaries and its isolation from other centres. However, a number of factors contains its capacity to function as more than a major activity centre. The population of Redcliffe – Kippa Ring will tend to access higher order services both locally and from the higher order centre of North Lakes. Land accessibility constraints, will essentially limit the area's ability to function as a principal centre. The population of the broader Redcliffe area is anticipated to increase by approximately 8,000 persons between 2011 and 2031, representing only 5% of the total population growth anticipated within Moreton Bay Regional Council in this period.

While it has a number of commercial office tenancies and community facilities, the Strathpine centre faces challenges in attracting higher order retail tenancies due to its proximity to Brisbane (particularly Chermside) and North Lakes. Westfield Strathpine previously featured a Myer department store, which closed in 2008. Subsequently, a Myer store was opened in North Lakes.

Strathpine is unlikely to attract a department store despite population growth in surrounding areas (particularly Warner), due to its proximity to Brisbane, and in particular to the Chermside Principal Regional Activity Centre which has both Myer and David Jones as tenants.

5.4.3 District Centres

The Draft Strategic Framework identifies nine district centres within Moreton Bay Regional Council:

- Arana Hills;
- Albany Creek;
- Warner;
- Petrie;
- Kallangur;
- Margate;
- Deception Bay;
- Burpengary, and
- Bellara.

Petrie and Warner currently do not function as district centres. However, in the 2011 to 2031 period, the population of Central Pine West (of which Warner is a part) is projected to increase by approximately 14,000 persons to 37,009 persons. With this growth, the function of Warner will evolve towards a district centre function.

Petrie services a large area (west to Dayboro) but has only limited provision of existing floor space. With an increase of floor space provision Petrie would have the potential to function as a district centre.

5.4.4 Local and Neighbourhood Centres

The key point of difference between local and neighbourhood centres should be the presence in a local centre of a full-line supermarket with a relative depth in product offering. A small scale centre anchored by a full-line supermarket (typically 2,500m^2 or larger) typically has a broader catchment than a centre with a smaller supermarket tenancy (e.g. an IGA, Foodworks, Aldi). However, despite Dayboro (Williams Street) and Samford (Main Street) not being anchored by a full-line supermarket they should be considered as local centres because they aim to cater for the day to day needs of the population within these rural villages.

The following classification is suggested:

- Local Centres
  - Woolworths Market Place (Albany Creek);
  - Banksia Beach Shopping Village;
  - Central Lakes Shopping Village;
  - Woodford Shopping Centre;

  - Lily Brook Shopping Village;
  - Astley Parade Local Centre;
  - Kensington Village Shopping Centre;
  - Murrumba Downs Shopping Centre;
  - Dayboro (Williams Street);
  - Samford (Main Street);
  - The Big Fish Tavern site (if Woolworths proposal ultimately proceeds);
  - Redcliffe Leagues Club site (if supermarket proposal ultimately proceeds); and
- Neighbourhood centres:
  - All other centres currently classified as local centres within Moreton Bay Regional Council.

5.4.5 Specialised Centre (Bulky Goods / Special Purpose)

Specialised centres are centres which do not conform to the other centre categories (i.e. Principal, Major, District, Local and Neighbourhood). Within Moreton Bay RC, specialised centres have a focus on bulky goods retailers (e.g. home improvement, homeware products, furniture, floor coverings electrical goods, etc.). Specialised centres within Moreton Bay RC currently include the Lawnton Employment Area, Zone Rothwell Centre and the Bunnings Rothwell and Harvey Norman Centres.

Table 5.11: Centre Parameters Utilised for Centres Network

Parameter	Principal Centre	Major Centre	District Centre	Local Centre	Neighborhood Centre
Place type	Major transport hubs serving regional catchments. Most significant employment and retail nodes outside Brisbane CBD. Preferred locations for tertiary, health, education, cultural and entertainment facilities.	Major transport hubs serving regional and sub-regional catchments. Accommodate key employment concentrations and substantial local residential population. Preferred locations for tertiary health, education, cultural and entertainment facilities.	Significant transport hubs servicing districts. Provide a diverse mix of land uses and activities with a concentration of retail, business, commercial, employment, health services, administrative, community, cultural, recreational and entertainment. Accommodates a residential population.	Service walkable catchments and located along public transport routes. Provides services to weekly needs, and lower order commercial services. Include lower order community facilities and/or are co-located with schools, local and district sporting facilities, etc.	Service walkable catchments. Provide services necessary to meet immediate and day-to-day needs. Include or lower order community facilities.
Approximate catchment size	>10km radius	~ 7.5km radius	~ 5km radius	~2km radius	~0.5 km radius
Retail	>60,000m^2 without limitations on types of tenants	~40,000m^2-60,000m^2 Including: • 2-4 full line supermarkets • 2 DDS • Mini majors • Specialty retailers • Retail showrooms	15,000m^2-25,000m^2 Including: • 1-2 full line supermarkets • 1 DDS • Mini majors • Specialty retailers • Retail showrooms Excludes: • Bulky goods centres • Dept stores	5,000m^2-7,000m^2 Including: • 1 full line supermarket • Specialty retailers Excludes: • Bulky goods centres • >1 full line supermarket • DDS • Mini majors • Dept stores • Retail showrooms / bulky goods	<2,000m^2 Including: • Limited line supermarket; • Specialty retailers. Excludes: • Bulky goods centres • Full line supermarkets • DDS • Mini majors • Dept stores • Retail showrooms / bulky goods
Commercial	Effectively no limits	>5,000m^2	2,000m^2-5,000m^2	500m^2-2,000m^2	<500m^2
Community	Examples include: • Tertiary education; • Schools; • Long day care; • Health precinct; • Place of worship; • Convention centre; • Library; • Cinema.	Examples include: • Long day care; • Place of worship; • Medical /health centre; • Indoor recreation; • Schools; • Arts hub; • Cinema.	Examples include: • Long day care; • Place of worship; • Medical /health centre; • Indoor recreation; • Schools.	Examples include: • Long day care; • Place of worship; and • Medical /health centre.	Examples include: • Long day care; • Place of worship; and • Medical /health centre.

6 RETAIL AND COMMERCIAL CATCHMENTS

The purpose of this study is to develop a sustainable centres hierarchy to support retail and commercial activity within the Moreton Bay Region. This section identifies catchments for retail and commercial sector activity to facilitate detailed small area analysis. These catchments represent sub-districts to the Moreton Bay Regional Council Draft Strategic Framework districts discussed in Section 2. The catchments defined in this Section are used in the retail and commercial analyses contained in Sections 7 and 8 of this report respectively.

Retail and commercial catchments have been identified based on the existing centres network. A number of additional factors were considered in defining the retail and commercial catchments for Moreton Bay Regional Council, including:

- Local road infrastructure in terms of access to the site;
- Natural and man-made barriers;
- Travel times for shopper and worker trips;
- The location, role and function of existing centres;
- Psychological barriers;
- Other barriers such as railways and water courses.

This report defines sixteen catchments within Moreton Bay Regional Council, with two catchments extending beyond the Moreton Bay Regional Council boundary. The catchments have been defined primarily using statistical local area (SLA) boundaries, with adjustments made with SA1 and SA2s as necessary.

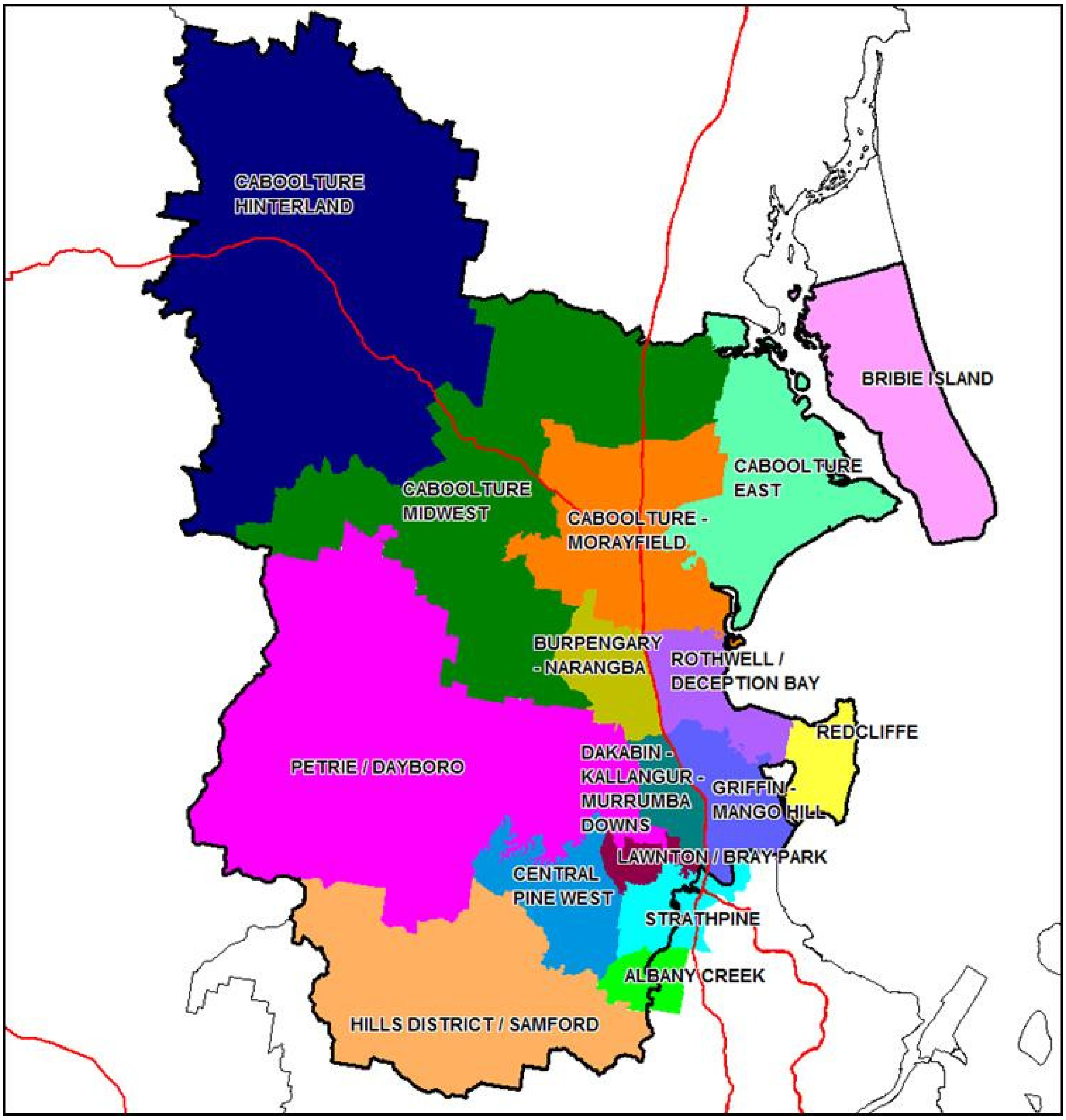
The catchments are as follows:

- Hills District / Samford;
- Albany Creek;
- Strathpine;
- Petrie / Dayboro;
- Central Pine West;
- Lawnton-Bray Park;
- Griffin-Mango Hill;
- Dakabin-Kallangur-Murrumba Downs;
- Redcliffe;
- Rothwell / Deception Bay;
- Bribie Island;
- Caboolture-Morayfield;
- Caboolture East;
- Burpengary-Narangba;

- Caboolture Midwest; and
- Caboolture Hinterland.

Figure 6.1 below provides a geographic representation of the retail and commercial catchments for Moreton Bay Regional Council.

Figure 6.1: Retail and Commercial Catchments for Moreton Bay Regional Council



6.1 Population and Household Projections within Catchments

The population of Moreton Bay RC retail and commercial catchments is projected to increase from 408,351 persons in 2012 to 556,918 persons in 2031, or by approximately 1.6% per annum.

The number of households in the activity centre catchments of Moreton Bay RC is anticipated to increase from 161,043 households in 2012 to 224,004 households in 2031 (~1.8% per annum).

Dakabin-Kallangur-Murrumba Downs, Burpengary-Narangba, Central Pine West, Caboolture Hinterland and Caboolture-Morayfield catchments are projected to have the highest rates of population and households formation growth.

Table 6.1 below provides a summary of the projected population and household growth within Moreton Bay RC by retail and commercial catchment areas.

Table 6.1: Projected Population and Households, 2012-2031

	2012	2016	2021	2026	2031	Ave. Ann Growth 2012 to 2031
Population						
Albany Creek	23,784	24,912	26,649	27,769	29,007	1.1%
Bribie Island	17,523	18,302	19,021	19,151	19,235	0.5%
Burpengary - Narangba	27,753	29,555	34,859	42,778	51,876	3.3%
Caboolture East	16,728	17,181	17,651	17,557	17,535	0.2%
Caboolture Hinterland	8,621	9,679	10,792	11,744	13,067	2.2%
Caboolture Midwest	15,729	17,285	19,283	21,166	23,173	2.1%
Caboolture Morayfield	53,698	64,284	71,155	74,344	83,114	2.3%
Central Pine West	24,134	27,143	31,148	34,595	37,009	2.3%
Dakabin-Kallangur-Murrumba Downs	30,053	35,341	39,906	42,088	42,367	1.8%
Griffin-Mango Hill	23,421	33,035	40,562	48,851	51,257	4.2%
Hills District/Samford	32,090	33,839	33,950	34,297	34,970	0.5%
Lawnton - Bray Park	15,886	16,760	17,350	17,750	18,494	0.8%
Petrie/Dayboro	18,609	19,216	19,672	19,896	20,033	0.4%
Redcliffe	48,708	50,285	51,947	53,089	54,387	0.6%
Rothwell - Deception Bay	30,910	34,097	36,241	36,335	37,104	1.0%
Strathpine	20,376	22,019	23,377	24,145	24,290	0.9%
Total	***408,351***	***452,933***	***493,563***	***525,555***	***556,918***	**1.6%**
Households						
Albany Creek	8,158	8,636	9,318	9,804	10,293	1.2%
Bribie Island	9,963	10,398	10,724	10,724	10,724	0.4%
Burpengary - Narangba	9,457	10,231	12,209	15,060	18,169	3.5%
Caboolture East	7,045	7,270	7,516	7,543	7,565	0.4%
Caboolture Hinterland	3,268	3,739	4,238	4,670	5,235	2.5%
Caboolture Midwest	5,510	6,103	6,876	7,562	8,265	2.2%
Caboolture Morayfield	20,875	24,972	27,939	29,680	33,048	2.4%
Central Pine West	7,995	9,240	10,715	12,129	13,075	2.6%
Dakabin-Kallangur-Murrumba Downs	12,330	14,363	16,300	17,173	17,336	1.8%
Griffin-Mango Hill	8,964	12,658	15,794	19,182	20,529	4.5%
Hills District/Samford	11,721	12,446	12,661	12,908	13,192	0.6%
Lawnton - Bray Park	6,100	6,493	6,740	6,896	7,196	0.9%
Petrie/Dayboro	6,606	6,956	7,349	7,551	7,608	0.7%
Redcliffe	23,398	24,317	25,530	26,558	27,353	0.8%
Rothwell - Deception Bay	11,972	13,287	14,259	14,611	15,008	1.2%
Strathpine	7,681	8,309	8,892	9,264	9,408	1.1%
Total	***161,043***	***179,418***	***197,061***	***211,315***	***224,004***	**1.8%**

	2012	2016	2021	2026	2031	Ave. Ann Growth 2012 to 2031
Average Household Size						
Albany Creek	2.92	2.88	2.86	2.83	2.82	-
Bribie Island	1.76	1.76	1.77	1.79	1.79	-
Burpengary - Narangba	2.93	2.89	2.86	2.84	2.86	-
Caboolture East	2.37	2.36	2.35	2.33	2.32	-
Caboolture Hinterland	2.64	2.59	2.55	2.51	2.50	-
Caboolture Midwest	2.85	2.83	2.80	2.80	2.80	-
Caboolture Morayfield	2.57	2.57	2.55	2.50	2.51	-
Central Pine West	3.02	2.94	2.91	2.85	2.83	-
Dakabin-Kallangur-Murrumba Downs	2.44	2.46	2.45	2.45	2.44	-
Griffin-Mango Hill	2.61	2.61	2.57	2.55	2.50	-
Hills District/Samford	2.74	2.72	2.68	2.66	2.65	-
Lawnton - Bray Park	2.60	2.58	2.57	2.57	2.57	-
Petrie/Dayboro	2.82	2.76	2.68	2.63	2.63	-
Redcliffe	2.08	2.07	2.03	2.00	1.99	-
Rothwell - Deception Bay	2.58	2.57	2.54	2.49	2.47	-
Strathpine	2.65	2.65	2.63	2.61	2.58	-
Total	***2.54***	***2.52***	***2.50***	***2.49***	***2.49***	**-**

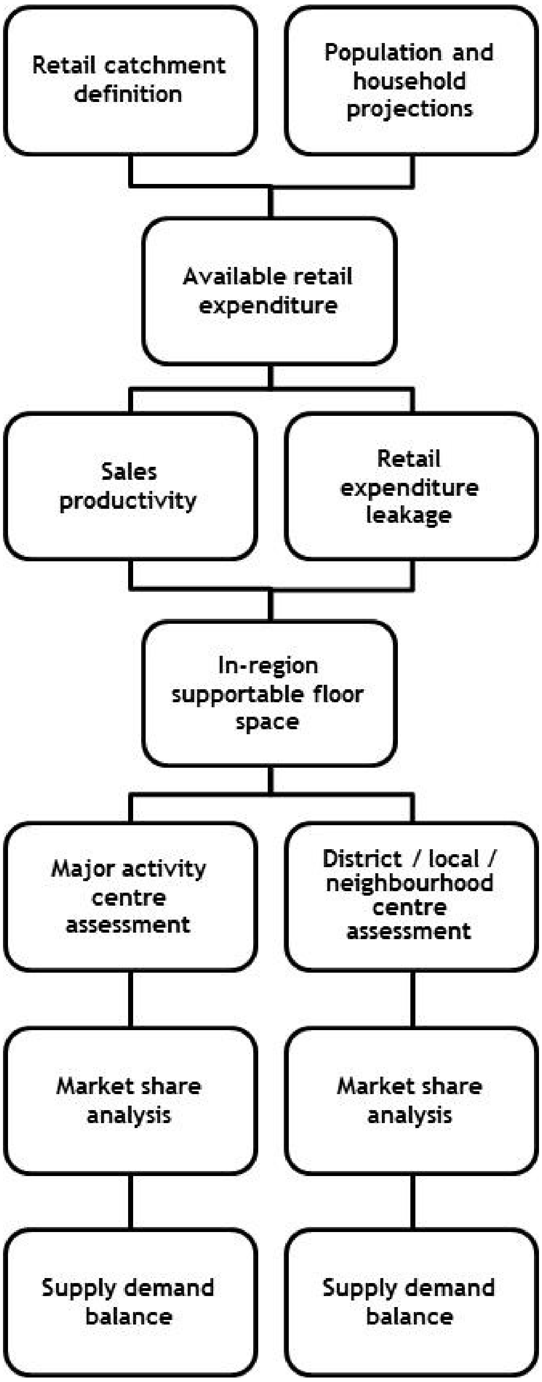
Note: The population and household projections presented in this table for Moreton Bay RC are based on those presented in the Moreton Bay Regional Council (2012a) Planning Assumptions Specification – October 2012 and have been adjusted to address the inconsistency between planning area boundaries and SLA boundaries.
Source: Moreton Bay Regional Council (2012a), Office of Economic and Statistical Research (2011) and Office of Economic and Statistical Research (2012)

7 PROJECTED RETAIL FLOOR SPACE DEMAND

7.1 Retail Floor Space Demand - Methodology

Figure 7.1 below outlines the methodology used to estimate retail floor space demand for each of the defined catchments within Moreton Bay Regional Council.

Figure 7.1: Methodology for Preparing Retail Floor Space Demand Projections



7.2 Available Retail Expenditure within Catchments

Retail expenditure analysis seeks to identify retail expenditure patterns for households in identified catchment areas, which can then be extrapolated by projected household formation over time to generate a total future available retail expenditure estimate for identified trade area/s.

A number of retail categories are identified, these being:

- Grocery and Specialty:
  - Groceries and take home food;
  - Dining & take-away food (including on-premise liquor);
  - Clothing, footwear and apparel;
  - Personal and other goods;
  - Takeaway liquor;
- Bulky goods:
  - Core bulky goods [2];
  - Ancillary bulky goods [3]; and
  - Hardware.

Retail expenditure data for Greater Metropolitan Brisbane is taken from the ABS Household Expenditure Survey 2009-10 (Cat No. 6535.0.55.001) and assigned to the above retail expenditure categories and then adjusted for sub-regional variations based on income quintiles. All estimates are expressed in 2011 dollars.

Table 7.1 below summarises the estimated weekly retail expenditure patterns of households within the trade areas between 2012 and 2031 (the detailed weekly retail expenditure by category table can be found in Appendix B).

Table 7.1: Weekly Retail Expenditure Patterns of Catchment Area Households, 2012-2031 (2011 dollars)

	2012	2016	2021	2026	2031
Albany Creek					
Total Grocery & Specialty	$563.71	$572.21	$586.65	$601.47	$616.66
Total Bulky Goods	$169.19	$171.74	$176.08	$180.52	$185.08
Total	$732.90	$743.95	$762.73	$781.99	$801.74
Bribie Island					
Total Grocery & Specialty	$407.54	$413.68	$424.13	$434.84	$445.82
Total Bulky Goods	$109.22	$110.86	$113.66	$116.53	$119.47
Total	$516.75	$524.54	$537.79	$551.37	$565.29

[2] Core bulky goods include furniture and floor coverings, household appliances and audio-visual equipment and parts.

[3] Ancillary bulky goods include blankets, household linen and household furnishings, glassware, tableware, cutlery and household utensils, home computer equipment, camping equipment and motor vehicle parts and accessories purchased separately

	2012	2016	2021	2026	2031
Burpengary - Narangba					
Total Grocery & Specialty	$444.31	$451.01	$462.39	$474.07	$486.04
Total Bulky Goods	$136.82	$138.88	$142.39	$145.98	$149.67
Total	$581.12	$589.89	$604.78	$620.05	$635.71
Caboolture East					
Total Grocery & Specialty	$413.30	$419.53	$430.12	$440.98	$452.12
Total Bulky Goods	$113.54	$115.25	$118.16	$121.15	$124.21
Total	$526.84	$534.78	$548.29	$562.13	$576.33
Caboolture Hinterland					
Total Grocery & Specialty	$424.69	$431.09	$441.98	$453.14	$464.58
Total Bulky Goods	$122.09	$123.93	$127.06	$130.27	$133.56
Total	$546.78	$555.02	$569.04	$583.41	$598.14
Caboolture Midwest					
Total Grocery & Specialty	$444.34	$451.04	$462.43	$474.10	$486.07
Total Bulky Goods	$136.84	$138.90	$142.41	$146.01	$149.69
Total	$581.18	$589.94	$604.84	$620.11	$635.77
Caboolture Morayfield					
Total Grocery & Specialty	$416.35	$422.62	$433.30	$444.24	$455.45
Total Bulky Goods	$115.83	$117.58	$120.54	$123.59	$126.71
Total	$532.18	$540.20	$553.84	$567.83	$582.16
Central Pine West					
Total Grocery & Specialty	$536.51	$544.60	$558.35	$572.45	$586.90
Total Bulky Goods	$162.02	$164.46	$168.62	$172.87	$177.24
Total	$698.53	$709.06	$726.96	$745.32	$764.14
Dakabin-Kallangur-Murrumba Downs					
Total Grocery & Specialty	$433.50	$440.03	$451.14	$462.54	$474.22
Total Bulky Goods	$128.70	$130.64	$133.94	$137.33	$140.79
Total	$562.20	$570.68	$585.09	$599.86	$615.01
Griffin-Mango Hill					
Total Grocery & Specialty	$455.38	$462.25	$473.92	$485.88	$498.15
Total Bulky Goods	$140.64	$142.76	$146.36	$150.06	$153.85
Total	$596.02	$605.00	$620.28	$635.94	$652.00
Hills District/Samford					
Total Grocery & Specialty	$539.04	$547.17	$560.99	$575.15	$589.67
Total Bulky Goods	$162.69	$165.14	$169.31	$173.59	$177.97
Total	$701.73	$712.31	$730.30	$748.74	$767.64
Lawnton - Bray Park					
Total Grocery & Specialty	$433.95	$440.49	$451.62	$463.02	$474.71
Total Bulky Goods	$129.05	$130.99	$134.30	$137.69	$141.17
Total	$563.00	$571.48	$585.92	$600.71	$615.88
Petrie/Dayboro					
Total Grocery & Specialty	$471.99	$479.10	$491.20	$503.60	$516.32
Total Bulky Goods	$145.02	$147.20	$150.92	$154.73	$158.64
Total	$617.00	$626.31	$642.12	$658.33	$674.96
Redcliffe					
Total Grocery & Specialty	$420.03	$426.36	$437.13	$448.17	$459.48
Total Bulky Goods	$118.59	$120.38	$123.42	$126.54	$129.73

	2012	2016	2021	2026	2031
Total	$538.63	$546.75	$560.55	$574.71	$589.22
Rothwell - Deception Bay					
Total Grocery & Specialty	$415.78	$422.04	$432.70	$443.63	$454.83
Total Bulky Goods	$115.40	$117.14	$120.10	$123.13	$126.24
Total	$531.18	$539.18	$552.80	$566.76	$581.07
Strathpine					
Total Grocery & Specialty	$437.64	$444.24	$455.46	$466.96	$478.75
Total Bulky Goods	$131.82	$133.80	$137.18	$140.65	$144.20
Total	$569.46	$578.04	$592.64	$607.61	$622.95

Source: Derived from ABS (2011) Household Expenditure Survey, 2009-10 Australian Bureau of Statistics (2012a)

Annual available retail expenditure in the combined retail and commercial catchment areas is anticipated to increase from $4,854.90 million in 2012 to $7,398.54 million in 2031 or by 2.2% per annum.

The major catchments in terms of total retail expenditure are:

- Caboolture – Morayfield: 11.9% of total retail expenditure in 2012 increasing to 13.5% in 2031;
- Redcliffe: 13.5% of total retail expenditure in 2012 decreasing to 11.3% in 2031;
- Griffin – Mango Hill: 5.7% of total retail expenditure in 2012 increasing to 9.4% in 2031; and
- Burpengary – Narangba: 5.9% of total retail expenditure in 2012 increasing to 8.1% in 2031.

Table 7.2 below summarises the annual available retail expenditure within the catchment areas (a detailed table can be found in Appendix B of this report).

Table 7.2: Annual Available Retail Expenditure within Catchment Areas, 2012-2031 ($M) (2011 dollars)

	2012	2016	2021	2026	2031
Albany Creek					
Total Grocery & Specialty	$239.13	$256.96	$284.27	$306.64	$330.06
Total Bulky Goods	$71.77	$77.12	$85.32	$92.03	$99.06
Total	$310.90	$334.08	$369.59	$398.68	$429.12
Bribie Island					
Total Grocery & Specialty	$211.13	$223.68	$236.51	$242.49	$248.61
Total Bulky Goods	$56.58	$59.94	$63.38	$64.98	$66.62
Total	$267.71	$283.62	$299.90	$307.47	$315.23
Burpengary - Narangba					
Total Grocery & Specialty	$218.50	$239.94	$293.56	$371.25	$459.21
Total Bulky Goods	$67.28	$73.89	$90.40	$114.32	$141.41
Total	$285.78	$313.83	$383.96	$485.58	$600.61
Caboolture East					
Total Grocery & Specialty	$151.40	$158.61	$168.10	$172.98	$177.87
Total Bulky Goods	$41.59	$43.57	$46.18	$47.52	$48.86
Total	$192.99	$202.18	$214.28	$220.50	$226.73

	2012	2016	2021	2026	2031
Caboolture Hinterland					
Total Grocery & Specialty	$72.17	$83.82	$97.40	$110.04	$126.47
Total Bulky Goods	$20.75	$24.10	$28.00	$31.63	$36.36
Total	$92.92	$107.91	$125.40	$141.67	$162.82
Caboolture Midwest					
Total Grocery & Specialty	$127.31	$143.14	$165.34	$186.43	$208.91
Total Bulky Goods	$39.21	$44.08	$50.92	$57.41	$64.34
Total	$166.52	$187.22	$216.26	$243.84	$273.24
Caboolture Morayfield					
Total Grocery & Specialty	$451.95	$548.79	$629.51	$685.61	$782.69
Total Bulky Goods	$125.73	$152.67	$175.13	$190.74	$217.75
Total	$577.68	$701.46	$804.64	$876.35	$1,000.43
Central Pine West					
Total Grocery & Specialty	$223.05	$261.67	$311.10	$361.05	$399.03
Total Bulky Goods	$67.36	$79.02	$93.95	$109.03	$120.50
Total	$290.41	$340.69	$405.05	$470.08	$519.54
Dakabin-Kallangur-Murrumba Downs					
Total Grocery & Specialty	$277.93	$328.65	$382.39	$413.04	$427.49
Total Bulky Goods	$82.52	$97.58	$113.53	$122.63	$126.92
Total	$360.45	$426.23	$495.92	$535.67	$554.41
Griffin-Mango Hill					
Total Grocery & Specialty	$212.26	$304.26	$389.22	$484.65	$531.78
Total Bulky Goods	$65.55	$93.97	$120.21	$149.68	$164.23
Total	$277.82	$398.22	$509.43	$634.33	$696.02
Hills District/Samford					
Total Grocery & Specialty	$328.53	$354.13	$369.35	$386.06	$404.52
Total Bulky Goods	$99.15	$106.88	$111.47	$116.52	$122.09
Total	$427.69	$461.00	$480.82	$502.58	$526.60
Lawnton - Bray Park					
Total Grocery & Specialty	$137.66	$148.73	$158.28	$166.04	$177.63
Total Bulky Goods	$40.94	$44.23	$47.07	$49.37	$52.82
Total	$178.59	$192.95	$205.35	$215.41	$230.46
Petrie/Dayboro					
Total Grocery & Specialty	$162.13	$173.30	$187.70	$197.73	$204.26
Total Bulky Goods	$49.81	$53.24	$57.67	$60.75	$62.76
Total	$211.94	$226.54	$245.38	$258.49	$267.02
Redcliffe					
Total Grocery & Specialty	$511.05	$539.12	$580.32	$618.93	$653.56
Total Bulky Goods	$144.29	$152.22	$163.85	$174.75	$184.53
Total	$655.34	$691.34	$744.18	$793.69	$838.09
Rothwell - Deception Bay					
Total Grocery & Specialty	$258.84	$291.61	$320.82	$337.05	$354.95
Total Bulky Goods	$71.84	$80.94	$89.05	$93.55	$98.52
Total	$330.68	$372.54	$409.87	$430.60	$453.46
Strathpine					
Total Grocery & Specialty	$174.81	$191.94	$210.61	$224.94	$234.21
Total Bulky Goods	$52.65	$57.81	$63.43	$67.75	$70.54
Total	$227.46	$249.75	$274.04	$292.68	$304.75

	2012	2016	2021	2026	2031
Total					
Total Grocery & Specialty	$3,757.86	$4,248.32	$4,784.49	$5,264.93	$5,721.23
Total Bulky Goods	$1,097.04	$1,241.26	$1,399.56	$1,542.69	$1,677.31
Total	$4,854.90	$5,489.57	$6,184.06	$6,807.61	$7,398.54

Source: Derived from Table 6.1 and Table 7.1

7.3 Sales Productivity

To derive the amount of retail floor space supportable by each catchment, sales productivity rates have been applied to each retail expenditure category. Sales productivity within the retail catchments has been assumed as follows:

- Groceries and take home food: $8,500/m^2;
- Dining and take-away food, including on-premise liquor: $5,000/m^2;
- Clothing, footwear and apparel: $4,500/m^2;
- Personal and other goods: $4,500/m^2;
- Core bulky goods: $3,500/m^2;
- Ancillary bulky goods: $4,000/m^2;
- Hardware: $2,500/m^2; and
- Takeaway liquor: $6,000/m^2.

Sales productivity rates are used as a means of rationing floor space within and across catchments. The sales productivity rates adopted allow for reasonable levels of commercial performance balanced against the need to ensure sufficient supply to meet community expectations of choice and convenience.

At a small area level, it may be appropriate to adopt marginally lower rates (i.e. no more than 10% lower) in situations where there is very limited choice.

7.4 Retail Expenditure Leakage Rates

Retail catchments within Moreton Bay Regional Council are anticipated to experience retail expenditure leakage to retail centres outside the region. Retail catchments located in close proximity to major Brisbane based centres and / or the Bruce Highway are anticipated to record marginally higher levels of retail expenditure leakage than those further north and / or removed from the Bruce Highway.

These adopted leakage rates seek to balance the inevitability of expenditure leakage to Brisbane centres against an overlying policy objective of Moreton Bay RC to minimise expenditure leakage.

Assumed retail expenditure leakage rates are shown in Table 7.3 below.

Table 7.3: Expenditure Leakage Range, Moreton Bay Regional Council

Retail Category	Low	High
Groceries & take home food	2.5%	10.0%
Dining & take-away food (incl. on-premise liquor)	7.5%	30.0%
Clothing, footwear & apparel	10.0%	40.0%
Personal & other goods	7.5%	30.0%
Core bulky goods	10.0%	40.0%
Ancillary bulky goods	10.0%	40.0%
Hardware	7.5%	30.0%
Takeaway liquor	2.5%	15.0%

The retail catchments by leakage gradient based on each retail catchment's proximity to major Brisbane based centres and / or the Bruce Highway is shown in Table 7.4.

Table 7.4: Expenditure Leakage outside Moreton Bay RC by Retail Catchment

Low	Low/Medium	Medium/High	High
Bribie Island	Burpengary - Narangba	Dakabin-Kallangur-Murrumba Downs	Albany Creek
Caboolture East	Griffin-Mango Hill	Strathpine	Hills District/Samford
Caboolture Hinterland	Lawnton - Bray Park		
Caboolture Midwest	Redcliffe		
Caboolture Morayfield	Rothwell - Deception Bay		
Central Pine West			
Petrie / Dayboro			

7.5 Supportable Floor Space

Floor space supportable by the estimated catchment generated expenditures is summarised in Table 7.5 below (a detailed table can be found in Appendix C). Supportable floor space is estimated by applying sales productivity rates and expenditure leakage rates to the catchment level available expenditure estimates.

The retail catchments in total are estimated to support 824,250m^2 of floor space in 2012, increasing to 1,263,666m^2 of floor space in 2031. In 2031, supportable floor space is anticipated to be largest in:

- Caboolture Morayfield: 178,997m^2 or 14.2% of total supportable floor space;
- Redcliffe: 144,754m^2 of 11.5% or total supportable floor space;
- Griffin – Mango Hill: 122,139m^2 or 9.7% of total supportable floor space;
- Burpengary – Narangba: 105,270m^2 or 8.3% of total supportable floor space; and
- Central Pine West: 94,834m^2 or 7.5% of total supportable floor space.

Table 7.5: Supportable Floor Space generated within Retail Catchments, 2012-2031 (sqm)

	2012	2016	2021	2026	2031
Albany Creek					
Total Grocery & Specialty	30,538	32,815	36,303	39,160	42,150
Total Bulky Goods	12,655	13,599	15,044	16,228	17,467
Total	43,194	46,414	51,347	55,388	59,618
Bribie Island					
Total Grocery & Specialty	33,004	34,964	36,971	37,905	38,862
Total Bulky Goods	14,590	15,457	16,344	16,756	17,179
Total	47,593	50,421	53,315	54,661	56,041
Burpengary - Narangba					
Total Grocery & Specialty	33,734	37,044	45,323	57,318	70,897
Total Bulky Goods	16,356	17,961	21,974	27,790	34,374
Total	50,089	55,005	67,297	85,108	105,270
Caboolture East					
Total Grocery & Specialty	23,746	24,876	26,365	27,130	27,897
Total Bulky Goods	10,710	11,220	11,891	12,236	12,582
Total	34,456	36,096	38,256	39,366	40,478
Caboolture Hinterland					
Total Grocery & Specialty	11,391	13,229	15,373	17,368	19,961
Total Bulky Goods	5,329	6,189	7,192	8,125	9,338
Total	16,720	19,418	22,565	25,493	29,299
Caboolture Midwest					
Total Grocery & Specialty	20,297	22,820	26,360	29,722	33,305
Total Bulky Goods	10,034	11,281	13,031	14,693	16,464
Total	30,331	34,102	39,391	44,415	49,770
Caboolture Morayfield					
Total Grocery & Specialty	71,007	86,221	98,904	107,718	122,969
Total Bulky Goods	32,352	39,284	45,063	49,079	56,028
Total	103,359	125,505	143,967	156,796	178,997
Central Pine West					
Total Grocery & Specialty	35,693	41,873	49,783	57,776	63,855
Total Bulky Goods	17,317	20,315	24,152	28,030	30,979
Total	53,010	62,187	73,936	85,806	94,834
Dakabin-Kallangur-Murrumba Downs					
Total Grocery & Specialty	40,756	48,193	56,073	60,568	62,687
Total Bulky Goods	18,930	22,385	26,045	28,133	29,117
Total	59,686	70,577	82,118	88,701	91,803
Griffin-Mango Hill					
Total Grocery & Specialty	32,812	47,033	60,167	74,919	82,204
Total Bulky Goods	15,940	22,849	29,229	36,396	39,935
Total	48,752	69,881	89,396	111,314	122,139
Hills District/Samford					
Total Grocery & Specialty	41,932	45,198	47,141	49,274	51,629
Total Bulky Goods	17,459	18,819	19,628	20,516	21,497
Total	59,391	64,017	66,769	69,790	73,126
Lawnton - Bray Park					
Total Grocery & Specialty	21,146	22,847	24,315	25,505	27,287

	2012	2016	2021	2026	2031
Total Bulky Goods	9,970	10,772	11,464	12,025	12,865
Total	31,117	33,618	35,778	37,531	40,153
Petrie/Dayboro					
Total Grocery & Specialty	25,894	27,678	29,979	31,581	32,623
Total Bulky Goods	12,764	13,643	14,777	15,567	16,080
Total	38,658	41,321	44,757	47,148	48,704
Redcliffe					
Total Grocery & Specialty	77,941	82,222	88,506	94,394	99,676
Total Bulky Goods	35,249	37,185	40,027	42,690	45,078
Total	113,190	119,407	128,533	137,085	144,754
Rothwell - Deception Bay					
Total Grocery & Specialty	39,385	44,371	48,817	51,285	54,008
Total Bulky Goods	17,568	19,792	21,775	22,876	24,091
Total	56,953	64,163	70,592	74,161	78,099
Strathpine					
Total Grocery & Specialty	25,683	28,200	30,942	33,048	34,410
Total Bulky Goods	12,069	13,252	14,540	15,530	16,170
Total	37,752	41,452	45,483	48,577	50,580
Total					
Total Grocery & Specialty	564,959	639,585	721,321	794,670	864,420
Total Bulky Goods	259,291	294,000	332,177	366,670	399,245
Total	824,250	933,585	1,053,498	1,161,340	1,263,666

Source: Derived from Table 7.2 and Economic Associates estimates

7.6 Centres by Retail Catchments

Table 7.6 below lists the centres hierarchy within the retail catchments as identified in Section 5 of this report.

Table 7.6: Activity Centres within Catchments (based on current centres hierarchy)

	Albany Creek	Bribie Island	Burpengary - Narangba	Caboolture Morayfield	Caboolture East	Caboolture Hinterland	Caboolture Midwest	Central Pine West	Dakabin Kallangur-Murrumba Downs	Griffin Mango Hill	Hills District / Samford	Lawnton - Bray Park	Petrie	Redcliffe	Rothwell - Deception Bay	Strathpine
PRAC				Caboolture Morayfield												
MRAC				Caboolture						North Lakes				Redcliffe - Kippa Ring		Strathpine
				Morayfield												
District	Albany Creek	Bribie Island	Burpengary	Caboolture Park Shopping Centre				Warner Village	Kallangur	Westfield North Lakes	Arana Hills		Petrie Village	Peninsula Fair	Deception Bay Shopping Centre	Westfield Strathpine
				Morayfield Shopping Centre										Margate Village		
Local	Albany Place	Bellara Corner Store	FoodWorks Burpengary	The Big Fish Tavern	Ningi	Woodford Shopping Centre	Wamuran	Bunya Park Drive Convenience Centre	Anzac Avenue Local Centre	North Lakes Convenience Centre	Ferny Way South	Francis Road Local Centre	Dayboro	Redcliffe IGA	Bayview Shops	Lincoln Centre
	Radius Medical Centre	Bribie Island Hotel	Oakey Flat Road	Tullawong Corner Store	The Village Sandstone Point	Woodford Central Shopping Centre	Elimbah	Eatons Hill Convenience Centre	Kallangur Village Shopping Centre	Astley Parade Local Centre	Mt Glorious	Ebert Place Shops	Beeville Road Local Centre	Redcliffe Coastal Strip Retail	Deception Bay Strip Retail	Bell's Corner
	Woolworths Market Place	Bongaree	Woodpecker Tavern	Lear Jet Centre	Beachmere Plaza	Woodford Strip Retail	Excelsior Park Village		Lilly Brook Shopping Village		Arlington Court	Ellis Street Local Centre		Clontarf Bayside Plaza	Zone Rothwell	Sandalwood Shopping Village
	Dawn Road Local Centre	Woorim	Narangba Village	Argyll Street Centre	Toorbul	D'Aguilar			Murrumba Downs Shopping Centre		Everton Shopping Village	Sparkes Road Local Centre		Landsborough Avenue Local Centre	Bay Markets	
		Welsby Parade Shops	Narangba Station Plaza	Bellmere Shopping Centre	Donnybrook				Castle Hill Centre		Chinook Street Local Centre	Kensington Village Shopping Centre		Mariners Plaza	Bunnings Rothwell & Harvey Norman Centre	
		Cotterill Shops	Chooks Corner	Central Lakes Shopping Village					Dakabin Village		Ferny Way Local Centre			Midways Convenience Centre	Deception Bay IGA	
		Aldi Centre - Bribie Island	Narangba Valley Shopping Centre	Trader Dukes Centre							170 Patricks Road			Ashmole Shopping Village	Rothwell Local Centre	

	Albany Creek	Bribie Island	Burpengary - Narangba	Caboolture Morayfield	Caboolture East	Caboolture Hinterland	Caboolture Midwest	Central Pine West	Dakabin Kallangur-Murrumba Downs	Griffin Mango Hill	Hills District / Samford	Lawnton - Bray Park	Petrie	Redcliffe	Rothwell - Deception Bay	Strathpine
		Coolgarra Shops		The Hub Convenience Centre							Fernlands Village			Victoria Avenue Local Centre	Burpengary Tavern	
		Currong Shops		Parkridge Shopping Village							Everton Hills Shopping Centre			Redcliffe Leagues Club	North Bay Shopping Centre	
		Elkhorn Avenue		Glenwood Drive Centre							Samford Village Main Street Retailing				North Rise	
		Marine Parade		Hillcrest Gardens Shopping Centre							Samford Central					
		Banksia Beach Shopping Village									Samford Country Centre					
											Samford Valley					

Note: Centres that fall within Brisbane City Council are not included in the table.

7.7 Large Scale Centre Assessment – PACs, MACs and Specialised Centre Precincts

7.7.1 Large Scale Centre Catchments and Market Shares

Larger centres within Moreton Bay RC are likely to draw trade from a number of retail catchment areas. Table 7.7 below lists the retail trade catchment areas for Caboolture – Morayfield Principal Activity Centre (PAC), North Lakes Major Activity Centre (MAC), Strathpine MAC and Redcliffe – Kippa Ring MAC.

Lawnton Employment Area and Rothwell – Deception Bay catchment area have extensive provision of bulky goods and hardware, and are likely to draw trade for these categories from surrounding retail catchment areas. As such, these precincts are also assessed separately in this section.

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Table 7.7: Principal, Major and Specialised Activity Centres Catchment Areas

				Specialised Centre	
Caboolture Morayfield PAC	**North Lakes MAC**	**Strathpine MAC**	**Redcliffe - Kippa Ring MAC**	**Lawnton Employment Area**	**Rothwell - Deception Bay Catchment**
Caboolture Morayfield	Griffin - Mango Hill	Strathpine	Redcliffe	Lawnton - Bray Park	Rothwell - Deception Bay
Burpengary - Narangba	Redcliffe	Lawton - Bray Park	Rothwell - Deception Bay	Dakabin - Kallangur - Murrumba Downs	Redcliffe
Bribie Island	Rothwell - Deception Bay	Albany Creek		Central Pine West	Griffin - Mango Hill
Caboolture East	Burpengary - Narangba	Central Pine West		Strathpine	
Caboolture Hinterland	Dakabin - Kallangur - Murrumba Downs	Petrie / Dayboro			
Caboolture Midwest		Hills District / Samford			

Tables 7.8 to 7.13 below summarise the market shares that each large scale centre is anticipated to achieve in its catchment.

Table 7.8: Market Shares of Large Scale Activity Centres, Caboolture Morayfield PAC

	Caboolture Morayfield	Burpengary - Narangba	Bribie Island	Caboolture East	Caboolture Hinterland	Caboolture Midwest
Groceries & take home food	70%	5%	10%	60%	10%	10%
Dining & take-away food[1]	65%	15%	10%	65%	20%	20%
Clothing, footwear & apparel	85%	45%	40%	85%	60%	70%
Personal & other goods	85%	45%	40%	85%	60%	70%
Core bulky goods	90%	50%	50%	90%	60%	70%
Ancillary bulky goods	90%	50%	50%	90%	60%	70%
Hardware	90%	50%	60%	90%	70%	70%
Takeaway liquor	80%	10%	10%	20%	20%	20%

Note1: includes on premise liquor

Table 7.9: Market Shares of Large Scale Activity Centres, North Lakes MAC

	Griffin - Mango Hill	Redcliffe	Rothwell - Deception Bay	Burpengary - Narangba	Dakabin-Kallangur-Murrumba Downs
Groceries & take home food	50%	30%	15%	5%	15%
Dining & take-away food[1]	70%	20%	15%	15%	15%
Clothing, footwear & apparel	80%	40%	40%	30%	40%
Personal & other goods	80%	40%	30%	30%	30%
Core bulky goods	50%	30%	30%	30%	50%
Ancillary bulky goods	50%	30%	30%	30%	50%
Hardware	50%	30%	30%	30%	50%
Takeaway liquor	80%	10%	10%	10%	10%

Note1: includes on premise liquor

Table 7.10: Market Shares of Large Scale Activity Centres, Strathpine MAC

	Strathpine	Lawnton - Bray Park	Albany Creek	Central Pine West	Petrie / Dayboro	Hills District / Samford
Groceries & take home food	50%	20%	10%	20%	10%	5%
Dining & take-away food[1]	40%	30%	25%	30%	20%	25%
Clothing, footwear & apparel	80%	20%	30%	40%	50%	25%
Personal & other goods	80%	20%	30%	40%	50%	25%
Core bulky goods	60%	5%	30%	20%	30%	25%
Ancillary bulky goods	60%	5%	30%	20%	30%	25%
Hardware	50%	5%	30%	20%	30%	25%
Takeaway liquor	50%	10%	10%	10%	10%	25%

Note1: includes on premise liquor

Table 7.11: Market Shares of Large Scale Activity Centres, Redcliffe - Kippa Ring MAC

	Redcliffe	Rothwell - Deception Bay
Groceries & take home food	45%	15%
Dining & take-away food[1]	55%	65%
Clothing, footwear & apparel	45%	30%
Personal & other goods	45%	20%
Core bulky goods	35%	10%
Ancillary bulky goods	35%	10%
Hardware	20%	20%
Takeaway liquor	70%	10%

Note1: includes on premise liquor

Table 7.12: Market Shares of Large Scale Activity Centres, Lawnton Employment Area

	Lawnton - Bray Park	Dakabin-Kallangur-Murrumba Downs	Central Pine West	Strathpine
Groceries & take home food	50%	-	-	-
Dining & take-away food[1]	60%	-	-	-
Clothing, footwear & apparel	60%	-	-	-
Personal & other goods	60%	-	-	-
Core bulky goods	80%	30%	30%	30%
Ancillary bulky goods	80%	30%	30%	30%
Hardware	80%	30%	30%	30%
Takeaway liquor	70%	-	-	-

Note1: includes on premise liquor
Note: Lawnton Employment Area has high provision of bulky goods floor space and is anticipated to capture market shares only within the bulky goods and hardware categories.

Table 7.13: Market Shares of Large Scale Activity Centres, Rothwell - Deception Bay Catchment

	Lawnton - Bray Park	Redcliffe	Griffin - Mango Hill
Groceries & take home food	70%	-	-
Dining & take-away food[1]	20%	-	-
Clothing, footwear & apparel	30%	-	-
Personal & other goods	50%	-	-
Core bulky goods	60%	20%	40%
Ancillary bulky goods	60%	20%	40%
Hardware	50%	20%	40%
Takeaway liquor	80%	-	-

Note1: includes on premise liquor
Note: Rothwell - Deception Bay has a high provision of bulky goods floor space and is anticipated to capture shares only within the bulky goods and hardware categories.

7.8 Large Scale Activity Centres Supply Demand Balance

7.8.1 Caboolture Morayfield PAC

Table 7.14 below shows the supply of retail floor space within Caboolture – Morayfield PAC as identified in Section 5 of this report and the projected demand of retail floor space within Caboolture – Morayfield PAC.

Demand for retail floor space in the Caboolture – Morayfield PAC is projected to increase from 160,321m^2 in 2012 to 259,967m^2 in 2031, or by approximately 2.6% per annum.

There is currently (2012) an oversupply of retail floor space within the Caboolture – Morayfield PAC particularly in non-food retail tenancies (including take home liquor). By 2016, retail floor space across all categories will be undersupplied by a total of 8,809m^2.

By 2031, there is projected to be significant demand for additional retail floor space within the Caboolture – Morayfield PAC in the order of:

- 14,838m^2 of additional groceries tenancies;
- 57,091m^2 of additional non-food (including take home liquor) tenancies; and
- 23,065m^2 of additional take-away and dining tenancies.

Table 7.14: Supply Demand Balance, Caboolture - Morayfield PAC, 2012-2031 (sqm)

	Supply	Demand					Balance				
	2012	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031
Caboolture Morayfield PAC											
Groceries	23,367	23,868	27,879	31,494	34,077	38,205	-501	-4,512	-8,126	-10,709	-14,838
Non-Food[1]	135,520	118,423	135,785	154,385	170,432	192,610	17,096	-266	-18,866	-34,912	-57,091
Take-away and dining	6,087	18,029	20,909	23,701	25,885	29,152	-11,942	-14,822	-17,614	-19,797	-23,065
Vacant	10,790	-	-	-	-	-	-	-	-	-	-
Total	175,764	160,321	184,573	209,580	230,393	259,967	15,443	-8,809	-33,816	-54,629	-84,204

Note: a negative balance indicates an undersupply of floor space
Note1: includes take home liquor

7.8.2 North Lakes MAC

Demand for retail floor space in the North Lakes MAC is projected to increase from 107,745m^2 in 2012 to 190,051m^2 in 2031, or by approximately 3.0% per annum.

There is estimated to be an undersupply of retail provision in North Lakes MAC, increasing from 20,617m^2 in 2012 to 102,923m^2 in 2031. All categories of floor space will be undersupplied by 2031 with the largest deficiency of 75,725m^2 being in non-food (including take home liquor) (72,725m^2).

Table 7.15: Supply Demand Balance, North Lakes MAC, 2012-2031 (sqm)

	Supply	Demand					Balance				
	2012	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031
North Lakes MAC											
Groceries	10,247	17,230	20,500	23,874	27,250	29,341	-6,983	-10,254	-13,627	-17,003	-19,094
Non-Food[1]	62,441	77,113	91,884	107,942	124,079	135,166	-14,673	-29,444	-45,501	-61,638	-72,725
Take-away and dining	8,835	13,402	16,602	19,890	23,380	25,545	-4,568	-7,768	-11,055	-14,545	-16,710
Vacant	5,606	-	-	-	-	-	-	-	-	-	-
Total	87,128	107,745	128,987	151,705	174,708	190,051	-20,617	-41,859	-64,577	-87,580	-102,923

Note: a negative balance indicates an undersupply of floor space
Note1: includes take home liquor

7.8.3 Strathpine MAC

Demand for retail floor space in the Strathpine MAC is projected to increase from 74,691m^2 in 2012 to 104,392m^2 in 2031, or by approximately 1.8% per annum (Table 7.16).

From 2016, there is estimated to be an undersupply of retail provision in Strathpine MAC, increasing from 4,482m^2 to 26,694m^2 in 2031. The estimated undersupply of retail floor space in Strathpine MAC in 2031 is driven by an undersupply of non-food (including take home liquor) floor space (20,038m^2) and to a lesser extent an undersupply of take-away and dining floor space (8,911m^2).

There is anticipated to be an oversupply of grocery floor space to 2021 and only limited demand for additional grocery floor space post 2021.

Table 7.16: Supply Demand Balance, Strathpine MAC, 2012-2031 (sqm)

	Supply	Demand					Balance				
	2012	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031
Strathpine MRAC											
Groceries	13,194	10,188	11,262	12,496	13,575	14,449	3,006	1,932	698	-381	-1,255
Non-Food[1]	52,608	52,216	57,383	63,308	68,481	72,646	392	-4,775	-10,700	-15,873	-20,038
Take-away and dining	8,386	12,287	13,536	14,940	16,208	17,297	-3,901	-5,150	-6,554	-7,822	-8,911
Vacant	3,511										
Total	77,699	74,691	82,181	90,743	98,263	104,392	3,008	-4,482	-13,044	-20,565	-26,694

Note: a negative balance indicates an undersupply of floor space
Note1: includes take home liquor

7.8.4 Redcliffe - Kippa Ring MAC

In the Redcliffe – Kippa Ring MAC, demand for retail floor space is projected to increase from 63,224m^2 in 2012 to 82,144m^2 in 2031, or by approximately 1.4% per annum.

A current oversupply of 12,272m^2 including vacancies (6,097m^2) is expected to shift to an undersupply of 2,344m^2 by 2026, with the largest undersupply being in non-food (including take home liquor).

Table 7.17: Supply Demand Balance, Redcliffe - Kippa Ring MAC, 2012-2031 (sqm)

	Supply	Demand					Balance				
	2012	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031
Redcliffe - Kippa Ring MAC											
Groceries	15,100	13,542	14,428	15,583	16,581	17,501	1,557	672	-484	-1,481	-2,402
Non-Food[1]	36,708	33,440	35,700	38,587	41,037	43,311	3,268	1,007	-1,879	-4,330	-6,604
Take-away and dining	17,593	16,242	17,569	19,074	20,223	21,332	1,350	24	-1,481	-2,630	-3,739
Vacant	6,097						-	-	-	-	-
Total	75,497	63,224	67,697	73,244	77,841	82,144	12,272	7,800	2,253	-2,344	-6,647

Note: a negative balance indicates an undersupply of floor space
Note1: includes take home liquor

7.8.5 Lawnton Employment Area

Retail floor space demand in the Lawnton Employment Area is projected to increase from 34,603m^2 in 2012 to 48,827m^2 in 2031, or by approximately 1.8% per annum.

A current oversupply of retail floor space in Lawnton Employment Area is expected to persist out to 2031 but to decline significantly from its current 19,174m^2 to 4,950m^2 by 2031.

Oversupply is expected in all categories but predominantly in non-food (including take home liquor).

Table 7.18: Supply Demand Balance, Lawnton Employment Area, 2012-2031 (sqm)

	Supply	Demand					Balance				
	2012	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031
Lawnton Employment Area											
Groceries	5,216	3,359	3,629	3,863	4,052	4,335	1,857	1,587	1,353	1,164	881
Non-Food[1]	41,071	28,188	31,580	35,167	38,024	40,550	12,883	9,491	5,904	3,047	521
Take-away and dining	4,132	3,055	3,301	3,513	3,685	3,942	1,077	831	619	447	190
Vacant	3,358	-	-	-	-	-	-	-	-	-	-
Total	53,777	34,603	38,510	42,542	45,761	48,827	19,174	15,267	11,235	8,016	4,950

Note: a negative balance indicates an undersupply of floor space
Note1: includes take home liquor

7.8.6 Rothwell - Deception Bay Catchment

There is extensive provision of bulky goods and hardware floor space within the Rothwell – Deception Bay catchment and as such the catchment has been assessed separately here.

The catchment is currently oversupplied in all floor space categories by 27,053m^2, more than half of which is in the non-food (including take home liquor) category. Demand-supply balance is expected to emerge around 2026 in groceries and non-food (including take home liquor) but take-away and dining is anticipated to remain oversupplied out to 2031.

Table 7.19: Supply Demand Balance, Rothwell - Deception Bay, 2012-2031 (sqm)

	Supply	Demand					Balance				
	2012	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031
Rothwell - Deception Bay Catchment											
Groceries	12,498	9,203	10,368	11,407	11,984	12,620	3,295	2,130	1,092	515	-122
Non-Food[1]	45,765	31,468	36,903	42,060	46,590	49,731	14,297	8,862	3,705	-825	-3,966
Take-away and dining	5,544	1,864	2,100	2,310	2,427	2,556	3,681	3,445	3,235	3,118	2,989
Vacant	5,780	-	-	-	-	-	-	-	-	-	-
Total	69,588	42,535	49,370	55,777	61,000	64,906	27,053	20,218	13,811	8,588	4,682

Note: a negative balance indicates an undersupply of floor space
Note1: includes take home liquor

7.9 District, Local and Neighbourhood Centres Assessment

Table 7.20 below shows the supply – demand balance for retail floor space within the catchments for the district, local and neighbourhood centres.

Floor space demand for district, local and neighbourhood centres is generated from the residual market share (i.e. the remaining market share after demand has been allocated to major activity centres within Moreton Bay RC).

The combined retail floor space demand in the retail catchments is projected to increase from 341,131m^2 in 2012 to 513,377m^2 in 2031. In 2031, supportable floor space within the catchment areas is projected to range from 7,597m^2 (Lawnton – Bray Park) to 60,240m^2 (Central Pine West).

In 2031, retail floor space is anticipated to be undersupplied in:

- Albany Creek (18,047m^2);
- Bribie Island (2,909m^2);
- Burpengary – Narangba (16,697m^2);
- Caboolture East (3,501m^2);
- Caboolture Hinterland (4,499m^2);
- Caboolture Midwest (23,425m^2);
- Caboolture Morayfield (20,593m^2);
- Central Pine West (49,197m^2);
- Dakabin-Kallangur-Murrumba Downs (16,045m^2);
- Griffin – Mango Hill (26,013m^2);
- Hills District / Samford (19,340m^2);
- Petrie / Dayboro (17,148m^2);
- Redcliffe (748m^2); and
- Strathpine (10,787m^2).

There is anticipated to be an oversupply of retail floor space in Lawnton – Bray Park (995m^2).

Table 7.20: Supply - Demand Balance, Retail Catchments, 2012-2031 (sqm)

	Supply	Demand					Balance				
	2012	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031
Albany Creek											
Groceries	14,881	9,529	10,240	11,328	12,220	13,153	5,352	4,641	3,553	2,661	1,728
Non-Food (liquor)	8,361	18,021	19,365	21,423	23,109	24,874	-9,660	-11,003	-13,062	-14,748	-16,512
Take-away and dining	3,374	5,513	5,924	6,554	7,070	7,610	-2,139	-2,550	-3,179	-3,695	-4,235
Vacant	972	-	-	-	-	-	-	-	-	-	-
Total	27,589	33,064	35,529	39,305	42,398	45,636	-5,475	-7,940	-11,716	-14,810	-18,047
Bribie Island											
Groceries	10,938	10,093	10,692	11,306	11,591	11,884	846	246	-368	-653	-946
Non-Food (liquor)	17,513	16,018	16,969	17,943	18,396	18,861	1,495	544	-430	-883	-1,348
Take-away and dining	6,003	6,937	7,349	7,771	7,967	8,169	-934	-1,346	-1,768	-1,964	-2,165
Vacant	1,550	-	-	-	-	-	-	-	-	-	-
Total	36,004	33,047	35,011	37,020	37,955	38,913	2,957	994	-1,016	-1,950	-2,909

	Supply	Demand					Balance				
	2012	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031
Burpengary - Narangba											
Groceries	12,823	9,389	10,311	12,615	15,954	19,733	3,434	2,513	208	-3,130	-6,910
Non-Food (liquor)	11,972	8,040	8,830	10,803	13,662	16,898	3,932	3,143	1,170	-1,689	-4,926
Take-away and dining	3,178	5,738	6,301	7,709	9,749	12,059	-2,560	-3,123	-4,531	-6,571	-8,881
Vacant	4,019	-	-	-	-	-	-	-	-	-	-
Total	31,993	23,168	25,441	31,127	39,365	48,691	8,825	6,552	867	-7,372	-16,697
Caboolture East											
Groceries	2,552	3,175	3,326	3,525	3,627	3,730	-623	-774	-973	-1,075	-1,178
Non-Food (liquor)	3,063	3,491	3,658	3,876	3,989	4,102	-429	-595	-814	-926	-1,039
Take-away and dining	1,011	1,953	2,046	2,168	2,231	2,294	-942	-1,035	-1,158	-1,221	-1,284
Vacant	0	-	-	-	-	-	-	-	-	-	-
Total	6,625	8,619	9,029	9,569	9,847	10,125	-1,994	-2,404	-2,945	-3,222	-3,501
Caboolture Hinterland											
Groceries	5,376	3,320	3,855	4,480	5,062	5,817	2,056	1,521	896	314	-441
Non-Food (liquor)	3,332	4,278	4,968	5,773	6,523	7,496	-946	-1,636	-2,441	-3,191	-4,164
Take-away and dining	3,467	2,166	2,515	2,923	3,302	3,795	1,301	952	544	165	-328
Vacant	434	-	-	-	-	-	-	-	-	-	-
Total	12,609	9,763	11,339	13,176	14,886	17,108	2,846	1,270	-567	-2,277	-4,499
Caboolture Midwest											
Groceries	679	5,615	6,313	7,292	8,222	9,213	-4,936	-5,634	-6,613	-7,543	-8,534
Non-Food (liquor)	828	6,295	7,078	8,175	9,218	10,329	-5,467	-6,250	-7,347	-8,390	-9,501
Take-away and dining	544	3,927	4,415	5,100	5,751	6,444	-3,383	-3,871	-4,556	-5,207	-5,900
Vacant	510	-	-	-	-	-	-	-	-	-	-
Total	2,561	15,837	17,806	20,567	23,191	25,986	-13,276	-15,245	-18,006	-20,630	-23,425
Caboolture Morayfield											
Groceries	7,879	7,059	8,571	9,832	10,708	12,225	821	-692	-1,953	-2,829	-4,345
Non-Food (liquor)	3,765	8,048	9,773	11,211	12,210	13,938	-4,284	-6,008	-7,446	-8,445	-10,174
Take-away and dining	3,612	5,858	7,113	8,159	8,886	10,145	-2,246	-3,501	-4,547	-5,274	-6,532
Vacant	458	-	-	-	-	-	-	-	-	-	-
Total	15,714	20,965	25,457	29,202	31,804	36,308	-5,251	-9,743	-13,488	-16,090	-20,593
Central Pine West											
Groceries	4,900	8,588	10,075	11,979	13,902	15,365	-3,689	-5,176	-7,079	-9,002	-10,465
Non-Food (liquor)	2,565	18,801	22,056	26,222	30,432	33,634	-16,236	-19,491	-23,658	-27,868	-31,070
Take-away and dining	3,439	6,283	7,371	8,764	10,171	11,241	-2,845	-3,932	-5,325	-6,732	-7,802
Vacant	139	-	-	-	-	-	-	-	-	-	-
Total	11,042	33,672	39,502	46,965	54,505	60,240	-22,630	-28,460	-35,923	-43,463	-49,197
Dakabin-Kallangur-Murrumba Downs											
Groceries	13,754	11,238	13,288	15,461	16,701	17,285	2,516	465	-1,708	-2,947	-3,531
Non-Food (liquor)	15,861	16,047	18,975	22,078	23,847	24,682	-186	-3,114	-6,216	-7,986	-8,820
Take-away and dining	6,574	8,247	9,752	11,347	12,257	12,685	-1,673	-3,178	-4,773	-5,682	-6,111
Vacant	2,418	-	-	-	-	-	-	-	-	-	-
Total	38,607	35,532	42,016	48,886	52,805	54,652	3,075	-3,409	-10,279	-14,198	-16,045
Griffin-Mango Hill											
Groceries	2,764	5,039	7,224	9,241	11,506	12,625	-2,275	-4,460	-6,477	-8,742	-9,861
Non-Food (liquor)	805	4,536	6,502	8,318	10,357	11,365	-3,731	-5,697	-7,513	-9,552	-10,560
Take-away and dining	377	2,407	3,450	4,413	5,495	6,029	-2,030	-3,073	-4,036	-5,118	-5,652
Vacant	60	-	-	-	-	-	-	-	-	-	-
Total	4,006	11,982	17,175	21,972	27,359	30,019	-7,976	-13,169	-17,966	-23,353	-26,013
Hills District/Samford											
Groceries	7,939	13,862	14,942	15,584	16,289	17,068	-5,922	-7,002	-7,644	-8,350	-9,128
Non-Food (liquor)	21,534	26,089	28,121	29,330	30,657	32,123	-4,555	-6,587	-7,796	-9,123	-10,588
Take-away and dining	7,538	7,511	8,096	8,444	8,826	9,248	27	-558	-906	-1,288	-1,710
Vacant	2,087	-	-	-	-	-	-	-	-	-	-
Total	39,098	47,461	51,159	53,357	55,772	58,438	-8,363	-12,061	-14,259	-16,674	-19,340
Lawnton - Bray Park											
Groceries	4,093	2,016	2,178	2,318	2,431	2,601	2,077	1,915	1,775	1,662	1,492
Non-Food (liquor)	3,050	3,363	3,633	3,867	4,056	4,339	-313	-584	-817	-1,006	-1,290
Take-away and dining	554	509	550	585	614	657	45	4	-31	-60	-103
Vacant	896	-	-	-	-	-	-	-	-	-	-

	Supply	Demand					Balance				
	2012	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031
Total	8,593	5,887	6,361	6,770	7,101	7,597	2,705	2,232	1,823	1,491	995
Petrie/Dayboro											
Groceries	6,816	7,090	7,579	8,209	8,648	8,933	-275	-763	-1,393	-1,832	-2,117
Non-Food (liquor)	6,222	15,312	16,367	17,728	18,675	19,291	-9,090	-10,145	-11,506	-12,453	-13,069
Take-away and dining	3,040	5,080	5,430	5,882	6,196	6,400	-2,040	-2,390	-2,842	-3,156	-3,361
Vacant	1,399	-	-	-	-	-	-	-	-	-	-
Total	17,476	27,482	29,376	31,818	33,518	34,624	-10,006	-11,899	-14,342	-16,042	-17,148
Redcliffe											
Groceries	8,832	6,428	6,781	7,299	7,785	8,221	2,404	2,051	1,532	1,047	611
Non-Food (liquor)	11,636	11,654	12,294	13,233	14,114	14,903	-17	-657	-1,597	-2,477	-3,267
Take-away and dining	4,330	4,630	4,884	5,257	5,607	5,921	-300	-554	-928	-1,278	-1,591
Vacant	3,499										
Total	28,297	22,712	23,959	25,790	27,506	29,045	5,585	4,338	2,507	791	-748
Strathpine											
Groceries	330	4,121	4,525	4,965	5,303	5,521	-3,791	-4,195	-4,635	-4,973	-5,191
Non-Food (liquor)	1,829	4,134	4,539	4,981	5,320	5,539	-2,306	-2,711	-3,152	-3,491	-3,710
Take-away and dining	2,639	3,683	4,044	4,437	4,739	4,934	-1,044	-1,405	-1,798	-2,100	-2,295
Vacant	410										
Total	5,208	11,938	13,108	14,383	15,361	15,994	-6,730	-7,901	-9,175	-10,154	-10,787

Note: a negative balance indicates an undersupply of floor space
Note: Rothwell - Deception Bay catchment is assessed separately in Table 7.19 and so does not appear in Table 7.20

7.10 Summary

7.10.1 Low Need

A catchment is characterised as having low need if its undersupply in 2031 is less than 10,000m^2 of retail floor space. Low need catchments are:

- Rothwell – Deception Bay;
- Bribie Island;
- Caboolture East;
- Caboolture Hinterland;
- Lawnton – Bray Park; and
- Redcliffe.

These catchment areas typically have a low population growth outlook (1.0% per annum or less).

7.10.2 Moderate Need

Moderate need for the provision of retail floor space is categorised as undersupply in the order of 10,000m^2 to 30,000m^2 by 2031. Retail catchments with a moderate need for additional retail floor space provision are:

- Albany Creek;
- Burpengary – Narangba;
- Caboolture Midwest;
- Dakabin-Kallangur-Murrumba Downs;

- Hills District / Samford; and
- Petrie / Dayboro.

With the exceptions of the Burpengary – Narangba and Dakabin-Kallangur-Murrumba Downs catchments, these catchments are estimated to have a current (2012) undersupply of floor space.

7.10.3 High Need

High need for retail floor space is categorised as an undersupply in excess of 30,000m^2 by 2031. Retail catchments with high demand for additional retail floor space are:

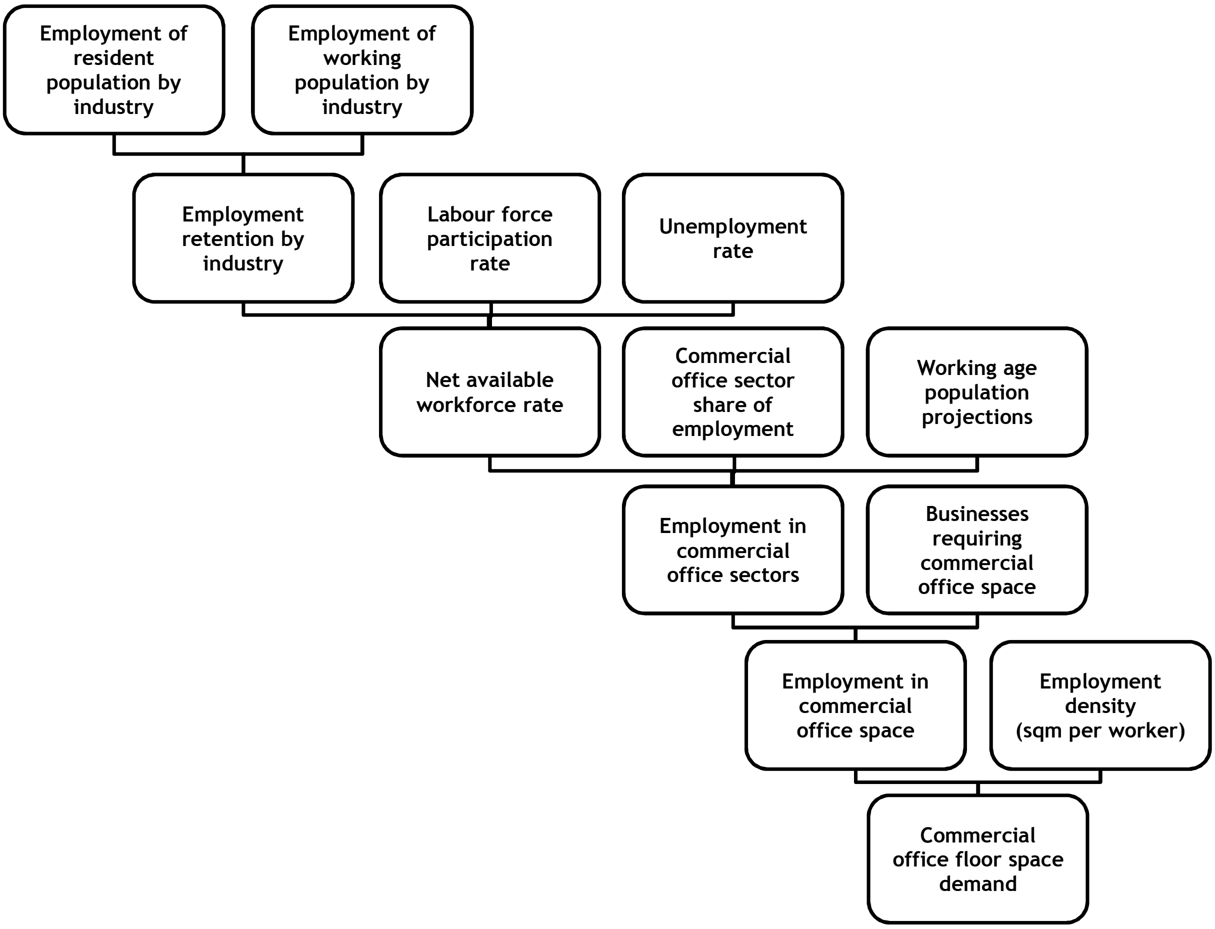
- Caboolture - Morayfield;
- Griffin – Mango Hill;
- Strathpine; and
- Central Pine West.

8 PROJECTED COMMERCIAL FLOOR SPACE DEMAND

8.1 Methodology

Figure 8.1 below outlines the methodology used to prepare commercial office floor space projections for each of the defined catchments within Moreton Bay Regional Council.

Figure 8.1: Methodology for Preparing Commercial Office Demand Projections



8.2 Assumptions

8.2.1 Employment in Industries Requiring Commercial Office Space

The key industry sectors requiring commercial office space are:

- Financial and insurance services
  - Finance;
  - Insurance and superannuation funds;
  - Auxiliary finance and insurance services;
  - Finance and insurance services, nfd[4];
- Professional, scientific and technical services
  - Professional, scientific and technical services (except computer services design and related services);
  - Professional, scientific and technical services, nfd;
  - Computer system design and related services;
- Health care and social assistance
  - Medical and other health care services;
- Rental, hiring and real estate services
  - Property operators and real estate services;
- Public administration and safety
  - Public administration;
- Information media and telecommunications
  - Internet publishing and broadcasting;
  - Internet service providers, web search portals and data processing services; and
- Administrative and support services
  - Administrative services.

8.2.2 Working Age Population

Within the sixteen catchments of Moreton Bay Regional Council, the working age population is projected to grow at an average annual rate of 0.2% per annum and 4.2% per annum between 2012 and 2031.

The catchments projected to have the highest average annual growth rate are:

- Griffin- Mango Hill – 4.2% per annum between 2012 and 2031;
- Burpengary – Narangba – 3.3% per annum between 2012 and 2031;

[4] nfd – not further defined

- Caboolture – Morayfield – 2.3% per annum between 2012 and 2031.

The projected working age population within each of the catchments in Moreton Bay Regional Council between 2011 and 2031 is summarised in Table 8.1.

Table 8.1: Projected Size of Working Age Population by Catchment, Moreton Bay Regional Council, 2011-2031

	2011	2012	2016	2021	2026	2031	Ave. Ann. Growth, 2012-31
Hills District / Samford	21,550	21,838	23,028	23,104	23,340	23,798	0.5%
Albany Creek	15,777	15,961	16,718	17,883	18,635	19,466	1.1%
Strathpine	13,742	14,011	15,140	16,074	16,602	16,702	0.9%
Petrie / Dayboro	12,606	12,707	13,122	13,433	13,586	13,680	0.4%
Central Pine West	16,047	16,526	18,586	21,329	23,689	25,342	2.3%
Lawnton - Bray Park	10,644	10,787	11,380	11,781	12,053	12,558	0.8%
Griffin - Mango Hill	13,864	15,109	21,311	26,167	31,514	33,066	4.2%
Redcliffe	30,726	30,972	31,975	33,032	33,758	34,583	0.6%
Rothwell - Deception Bay	18,601	19,063	21,029	22,351	22,409	22,883	1.0%
Bribie Island	9,067	9,166	9,573	9,950	10,018	10,062	0.5%
Caboolture - Morayfield	32,933	34,448	41,239	45,647	47,692	53,319	2.3%
Caboolture East	9,932	9,999	10,269	10,550	10,494	10,481	0.2%
Burpengary - Narangba	18,294	18,583	19,790	23,342	28,644	34,736	3.3%
Caboolture Midwest	10,307	10,553	11,597	12,937	14,200	15,547	2.1%
Caboolture Hinterland	5,771	5,941	6,670	7,437	8,093	9,005	2.2%
Dakabin - Kallangur - Murrumba Downs	19,332	20,132	23,674	26,732	28,193	28,380	1.8%

Source: Australian Bureau of Statistics (2012a) and Economic Associates estimates

8.2.3 Labour Market Characteristics

Unemployment rates at the 2011 Census varied between 3.6% (Central Pine West) and 9.4% (Caboolture – Morayfield). Labour force participation rates within the catchments varied between 59.8% (Caboolture Hinterland) and 81.9% (Central Pine West).

For the purpose of this analysis, it has been assumed that unemployment rates and labour force participation rates remain constant throughout the projection period within each catchment.

Assumed unemployment rates and labour force participation rates between 2011 and 2031 are shown in Table 8.2.

Table 8.2: Projected Labour Market Characteristics (15-64 population) by Catchment, Moreton Bay Regional Council, 2011 to 2031

	Unemployment Rate	Labour Force Participation Rate
Hills District / Samford	4.1%	79.4%
Albany Creek	3.8%	80.8%
Strathpine	5.7%	77.0%
Petrie / Dayboro	4.9%	77.6%
Central Pine West	3.6%	81.9%
Lawnton - Bray Park	6.4%	75.7%
Griffin - Mango Hill	4.9%	80.7%
Redcliffe	7.2%	70.7%
Rothwell - Deception Bay	8.4%	67.7%
Bribie Island	8.5%	61.4%

	Unemployment Rate	Labour Force Participation Rate
Caboolture - Morayfield	9.4%	67.5%
Caboolture East	8.7%	64.8%
Burpengary - Narangba	5.7%	77.5%
Caboolture Midwest	5.5%	75.2%
Caboolture Hinterland	5.2%	59.8%
Dakabin - Kallangur - Murrumba Downs	5.7%	76.6%

Source: Australian Bureau of Statistics (2012a) and Economic Associates estimates

8.2.4 Employment by Industry

The incidence of resident employment in commercial office sectors was highest in Hills District / Samford and Albany Creek as at 2011. It is likely that a significant proportion of residents from these catchments pursue commercial office employment opportunities within the Brisbane City Council area.

The four major commercial office precincts within Moreton Bay Regional Council are contained within the Strathpine, Griffin – Mango Hill, Redcliffe and Caboolture – Morayfield catchments. The incidence of employment within commercial office sectors in these catchments is likely to increase in the 2011 to 2031 period, as an increasing range of commercial opportunities are established within these precincts.

The analysis assumes that the incidence of employment within commercial office sectors in all other catchments remains relatively stable throughout the projection period.

Table 8.3 below summarises the projected employment within commercial office sectors between 2011 and 2031.

Table 8.3: Projected Employment within Commercial Office Sectors by Catchment, Moreton Bay Regional Council, 2011-2031

	2011	2012	2016	2021	2026	2031
Hills District / Samford	26.9%	26.9%	26.9%	26.9%	26.9%	26.9%
Albany Creek	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%
Strathpine	19.0%	19.0%	19.3%	19.7%	20.1%	20.4%
Petrie / Dayboro	20.7%	20.7%	20.7%	20.7%	20.7%	20.7%
Central Pine West	21.7%	21.7%	21.7%	21.7%	21.7%	21.7%
Lawnton - Bray Park	18.3%	18.3%	18.3%	18.3%	18.3%	18.3%
Griffin - Mango Hill	21.1%	21.2%	21.5%	21.9%	22.3%	22.7%
Redcliffe	17.4%	17.5%	17.7%	18.1%	18.4%	18.7%
Rothwell - Deception Bay	13.0%	13.0%	13.0%	13.0%	13.0%	13.0%
Bribie Island	17.3%	17.3%	17.3%	17.3%	17.3%	17.3%
Caboolture - Morayfield	13.4%	13.5%	13.7%	14.0%	14.2%	14.4%
Caboolture East	13.9%	13.9%	13.9%	13.9%	13.9%	13.9%
Burpengary - Narangba	16.6%	16.6%	16.6%	16.6%	16.6%	16.6%
Caboolture Midwest	14.8%	14.8%	14.8%	14.8%	14.8%	14.8%
Caboolture Hinterland	13.2%	13.2%	13.2%	13.2%	13.2%	13.2%
Dakabin - Kallangur - Murrumba Downs	17.0%	17.0%	17.0%	17.0%	17.0%	17.0%

Source: Australian Bureau of Statistics (2012a) and Economic Associates estimates

8.2.5 Employment Retention

Employment retention within commercial office sectors at the 2011 Census ranged between 16.2% (Central Pine West) and 136.4% (Strathpine).

The following assumptions have been made regarding the degree of change to employment retention rates in the catchments of Moreton Bay Regional Council to 2031:

- Strathpine, Redcliffe and Caboolture - Morayfield: These three centres are anticipated to continue to record relatively high employment retention rates within Moreton Bay Regional Council, with retention increasing by 10% between 2011 and 2031;
- Griffin – Mango Hill: As North Lakes evolves and fulfils its role as a higher order centre, it is envisaged that employment retention in commercial office sectors will also increase. The analysis assumes that commercial office sector retention in Griffin – Mango Hill in 2031 will be consistent with that recorded in Redcliffe as of the 2011 Census;
- Central Pine West: As Warner expands and fulfils its role as a district centre, employment retention in commercial office sectors is also expected to increase. The analysis assumes that commercial office sector retention in Central Pine West in 2031 is consistent with that recorded in Dakabin – Kallangur – Murrumba Downs as at the 2011 Census;
- All other catchments: Employment retention in commercial office sectors increases by 5% in all other catchments, as part of Moreton Bay Regional Council's efforts to improve employment retention throughout Moreton Bay Regional Council.

Table 8.4 below summarises the assumed employment retention within each of the catchments within Moreton Bay Regional Council between 2011 and 2031.

Table 8.4: Projected Employment Retention within Commercial Office Sectors by Catchment, Moreton Bay Regional Council, 2011-2031

	2011	2012	2016	2021	2026	2031
Hills District / Samford	24.1%	24.2%	24.4%	24.7%	25.0%	25.3%
Albany Creek	26.2%	26.3%	26.6%	26.9%	27.3%	27.5%
Strathpine	136.4%	137.1%	140.0%	143.6%	147.2%	150.0%
Petrie / Dayboro	33.2%	33.3%	33.6%	34.1%	34.5%	34.8%
Central Pine West	16.2%	16.6%	18.1%	19.9%	21.8%	23.3%
Lawnton - Bray Park	20.9%	20.9%	21.1%	21.4%	21.7%	21.9%
Griffin - Mango Hill	37.7%	39.5%	46.5%	55.3%	64.1%	71.2%
Redcliffe	71.2%	71.5%	73.0%	74.9%	76.8%	78.3%
Rothwell - Deception Bay	50.8%	50.9%	51.5%	52.1%	52.8%	53.3%
Bribie Island	67.6%	67.8%	68.5%	69.4%	70.3%	71.0%
Caboolture - Morayfield	92.4%	92.8%	94.8%	97.2%	99.6%	101.6%
Caboolture East	22.2%	22.3%	22.5%	22.8%	23.1%	23.3%
Burpengary - Narangba	29.5%	29.6%	29.9%	30.3%	30.7%	31.0%
Caboolture Midwest	20.3%	20.4%	20.6%	20.9%	21.1%	21.4%
Caboolture Hinterland	54.3%	54.5%	55.0%	55.7%	56.5%	57.0%
Dakabin - Kallangur - Murrumba Downs	23.3%	23.3%	23.6%	23.9%	24.2%	24.4%

Source: Australian Bureau of Statistics (2012a) and Economic Associates estimates

8.3 Employment Projections for Commercial Office Space

8.3.1 Employment within Commercial Office Sectors

Based on the assumptions presented in Section 8.2 above, employment within commercial office sectors is estimated to be highest in 2012 in Strathpine, Caboolture – Morayfield and Redcliffe.

By 2031, employment within commercial office sectors is projected to be highest in the Caboolture - Morayfield and Griffin – Mango Hill catchments, at 4,805 persons and 3,998 persons, respectively.

Table 8.5 below summarises projected employment within commercial office sectors in each of the catchments in Moreton Bay Regional Council between 2012 and 2031.

Table 8.5: Projected Employment within Commercial Office Sectors by Catchment, Moreton Bay Regional Council, 2012-2031

	2012	2016	2021	2026	2031
Hills District / Samford	1,079	1,150	1,169	1,196	1,232
Albany Creek	814	862	934	986	1,040
Strathpine	2,662	2,983	3,311	3,572	3,718
Petrie / Dayboro	645	673	698	715	727
Central Pine West	472	586	751	923	1,063
Lawnton - Bray Park	293	313	328	340	358
Griffin – Mango Hill	980	1,635	2,408	3,399	3,998
Redcliffe	2,528	2,706	2,923	3,120	3,307
Rothwell - Deception Bay	775	864	930	944	974
Bribie Island	602	635	669	682	692
Caboolture - Morayfield	2,650	3,289	3,807	4,154	4,805
Caboolture East	187	194	202	204	205
Burpengary - Narangba	662	713	852	1,058	1,297
Caboolture Midwest	227	252	284	316	349
Caboolture Hinterland	244	277	313	345	387
Dakabin - Kallangur - Murrumba Downs	583	692	792	846	860

Source: Economic Associates estimates

8.3.2 Employment within Commercial Office Space

Employment includes jobs in sole trader businesses as well as employing businesses. The Australian Bureau of Statistics information regarding the incidence of employment in sole trader businesses and employing businesses by industry at the SA2 level has been applied to the commercial office employment analysis.

As of June 2011, an estimated 27% (Caboolture Hinterland) to 93% (Strathpine) of employment within commercial office sectors was within employing businesses in Moreton Bay Regional Council. The analysis assumes that the proportion of commercial office sector employment within employing businesses remains constant throughout the projection period.

Table 8.6 below summarises the proportion of commercial office sector employment within employing businesses by catchment.

Table 8.6: Proportion of Commercial Office Sector Employment within Employing Businesses by Catchment, Moreton Bay Regional Council, 2011-2031

	Financial & Insurance Services	Professional, Scientific & Technical Services	Health Care & Social Assistance	Rental, Hiring & Real Estate Services	Public Administration & Safety	Information Media & Telecommunications	Administrative & Support Services	Commercial Office Sectors
Hills District / Samford	45%	80%	90%	20%	100%	65%	95%	74%
Albany Creek	50%	80%	95%	80%	70%	85%	95%	79%
Strathpine	85%	95%	95%	80%	100%	100%	90%	93%
Petrie / Dayboro	35%	80%	90%	80%	0%	0%	65%	58%
Central Pine West	55%	60%	65%	75%	0%	85%	90%	64%
Lawnton - Bray Park	75%	60%	95%	90%	100%	0%	55%	71%
Griffin – Mango Hill	40%	80%	70%	80%	85%	80%	90%	67%
Redcliffe	45%	80%	90%	65%	0%	0%	70%	62%
Rothwell - Deception Bay	90%	50%	95%	10%	100%	35%	95%	78%
Bribie Island	60%	75%	100%	85%	85%	0%	95%	84%
Caboolture Morayfield	60%	85%	95%	80%	95%	0%	95%	88%
Caboolture East	20%	65%	80%	50%	0%	0%	90%	60%
Burpengary - Narangba	60%	60%	90%	75%	100%	0%	95%	77%
Caboolture Midwest	35%	60%	55%	25%	0%	0%	65%	49%
Caboolture Hinterland	0%	60%	80%	35%	0%	0%	0%	27%
Dakabin - Kallangur - Murrumba Downs	20%	55%	95%	15%	0%	0%	90%	53%

Source: ABS 8165.0, Economic Associates estimates

Sole trader businesses typically operate either from home (which does not require commercial office space) or within commercial office space.

For the purposes of this assessment, it has been assumed that:

- Half of all sole trader businesses within each catchment require commercial office space; and
- All employing businesses within each catchment require commercial office space.

Table 8.7 below provides a summary of the projected employment within commercial office space in employing and non-employing businesses between 2012 and 2031.

Table 8.7: Projected Employment within Commercial Office Space by Catchment, Moreton Bay Regional Council, 2012-2031

	Employing Businesses					Non-Employing Businesses					Total Businesses				
	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031
Hills District / Samford	801	854	868	888	914	77	82	84	86	88	878	936	951	973	1,002
Albany Creek	644	681	738	779	822	59	62	68	71	75	703	744	806	851	898
Strathpine	2,484	2,783	3,089	3,333	3,469	78	88	97	105	109	2,562	2,871	3,186	3,438	3,578
Petrie / Dayboro	376	392	406	416	424	38	40	41	42	43	414	432	448	459	466
Central Pine West	300	371	474	580	667	51	63	80	98	112	351	434	554	678	779
Lawnton - Bray Park	208	222	233	241	254	26	27	29	30	31	234	249	261	271	285
Griffin – Mango Hill	664	1,134	1,705	2,443	2,901	92	150	217	301	351	756	1,284	1,922	2,744	3,252
Redcliffe	1,576	1,687	1,822	1,945	2,061	169	181	195	208	221	1,744	1,867	2,017	2,153	2,282
Rothwell - Deception Bay	603	672	724	735	758	36	40	43	44	45	639	712	767	779	803
Bribie Island	506	534	562	573	582	35	37	39	40	40	541	571	601	613	622
Caboolture Morayfield	2,344	2,910	3,367	3,675	4,251	120	149	173	189	218	2,464	3,059	3,540	3,863	4,469
Caboolture East	112	116	121	122	123	18	18	19	19	20	130	135	140	141	143
Burpengary - Narangba	509	548	654	813	996	51	55	66	82	101	560	603	720	895	1,097
Caboolture Midwest	111	123	139	155	171	24	27	30	34	37	135	150	170	189	209
Caboolture Hinterland	65	73	83	91	103	11	13	14	16	18	76	86	97	107	121
Dakabin - Kallangur - Murrumba Downs	309	368	421	449	457	41	49	56	60	61	351	417	476	509	518

Source: Economic Associates estimates

8.3.3 Commercial Office Floor Space Demand

The average office space per employee in Queensland is 20m^2 per employee. However, the Queensland Government along with a number of other state governments has set occupancy density targets of 15m^2 per employee. For the purpose of this assessment the midpoint of 17.5m^2 per employee has been applied in respect of employing businesses.

In the case of sole traders, it has been assumed that a 17.5m^2 tenancy would be insufficient, and as such a floor space ratio of 30m^2 per sole trader has been assumed.

Table 8.8 below provides an overview of commercial office floor space demand by catchment between 2012 and 2031.

Table 8.8: Projected Commercial Office Floor Space Demand by Catchment, Moreton Bay Regional Council, 2012-2031

	Employing Businesses					Non-Employing Businesses					Total Businesses				
	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031	2012	2016	2021	2026	2031
Hills District / Samford	14,019	14,938	15,182	15,534	15,999	2,316	2,468	2,508	2,566	2,643	16,335	17,406	17,690	18,100	18,642
Albany Creek	11,266	11,924	12,921	13,637	14,389	1,771	1,874	2,031	2,143	2,261	13,036	13,798	14,952	15,780	16,650
Strathpine	43,465	48,707	54,063	58,322	60,709	2,343	2,626	2,915	3,144	3,273	45,808	51,333	56,978	61,467	63,982
Petrie / Dayboro	6,574	6,860	7,114	7,287	7,412	1,141	1,191	1,235	1,265	1,286	7,715	8,051	8,348	8,552	8,698
Central Pine West	5,249	6,494	8,299	10,158	11,672	1,532	1,890	2,408	2,939	3,372	6,781	8,384	10,706	13,097	15,043
Lawnton - Bray Park	3,640	3,881	4,069	4,217	4,438	773	824	865	896	943	4,413	4,705	4,934	5,112	5,381
Griffin – Mango Hill	11,618	19,843	29,838	42,757	50,762	2,754	4,499	6,496	9,035	10,526	14,372	24,341	36,334	51,792	61,288
Redcliffe	27,573	29,519	31,882	34,032	36,074	5,061	5,419	5,852	6,247	6,622	32,635	34,938	37,735	40,279	42,696
Rothwell - Deception Bay	10,556	11,767	12,669	12,865	13,270	1,074	1,197	1,289	1,309	1,350	11,630	12,964	13,958	14,174	14,620
Bribie Island	8,857	9,348	9,841	10,035	10,181	1,047	1,105	1,163	1,186	1,203	9,903	10,452	11,004	11,221	11,385
Caboolture Morayfield	41,019	50,922	58,929	64,308	74,389	3,612	4,484	5,189	5,662	6,550	44,631	55,406	64,118	69,970	80,939
Caboolture East	1,960	2,034	2,117	2,133	2,152	534	555	577	581	587	2,494	2,589	2,694	2,714	2,738
Burpengary - Narangba	8,905	9,583	11,449	14,230	17,432	1,542	1,660	1,983	2,465	3,019	10,447	11,242	13,432	16,695	20,451
Caboolture Midwest	1,943	2,157	2,438	2,710	2,997	726	806	911	1,012	1,120	2,668	2,963	3,348	3,722	4,117
Caboolture Hinterland	1,132	1,284	1,451	1,599	1,797	339	385	435	479	538	1,471	1,669	1,885	2,078	2,335
Dakabin - Kallangur - Murrumba Downs	5,414	6,434	7,359	7,861	7,993	1,234	1,467	1,678	1,792	1,822	6,649	7,901	9,037	9,653	9,816

Source: Economic Associates estimates

8.3.4 Incremental Commercial Office Floor Space Demand

The largest demand for additional floor space (i.e. over and above 2012 demand) occurs in:

- Griffin-Mango Hill: Incremental commercial office floor space demand of 46,916m^2;
- Caboolture-Morayfield: Incremental commercial office floor space demand of 36,309m^2;
- Strathpine: Incremental commercial office floor space demand of 18,174m^2;
- Redcliffe: Incremental commercial office floor space demand of 10,062m^2; and
- Burpengary-Narangba: Incremental commercial office floor space demand of 10,003m^2.

Table 8.9 below summarises the incremental commercial office floor space demand by catchment within Moreton Bay Regional Council between 2016 and 2031.

Table 8.9: Incremental Commercial Office Floor Space Demand by Catchment, Moreton Bay Regional Council, 2016-2031

	2016	2021	2026	2031
Hills District / Samford	1,071	1,355	1,765	2,307
Albany Creek	762	1,915	2,744	3,614
Strathpine	5,525	11,170	15,658	18,174
Petrie / Dayboro	335	633	837	983
Central Pine West	1,603	3,925	6,316	8,262
Lawnton - Bray Park	292	521	699	967
Griffin - Mango Hill	9,969	21,962	37,420	46,916
Redcliffe	2,303	5,100	7,644	10,062
Rothwell - Deception Bay	1,334	2,328	2,544	2,990
Bribie Island	549	1,101	1,318	1,481
Caboolture Morayfield	10,775	19,487	25,339	36,309
Caboolture East	94	200	220	244
Burpengary - Narangba	795	2,985	6,248	10,003
Caboolture Midwest	295	680	1,054	1,448
Caboolture Hinterland	198	414	607	864
Dakabin - Kallangur - Murrumba Downs	1,252	2,388	3,005	3,167

Note: Incremental commercial office floor space demand estimates are on 2012 levels.
Source: Economic Associates estimates

8.4 Summary

8.4.1 Low Need

A catchment is characterised as having low need if its incremental demand in 2031 is less than 10,000m^2 of commercial office floor space. Low need catchments are:

- Hills District / Samford;
- Albany Creek;
- Petrie / Dayboro;
- Central Pine West;
- Lawnton – Bray Park;

- Rothwell Deception Bay;
- Bribie Island;
- Caboolture East;
- Caboolture Midwest;
- Caboolture Hinterland; and
- Dakabin – Kallangur – Murrumba Downs.

8.4.2 Moderate Need

Moderate need for the provision of commercial office floor space is categorised as incremental demand in the order of 10,000m^2 to 30,000m^2 by 2031. Retail catchments with a moderate need for additional retail floor space provision are:

- Strathpine;
- Redcliffe; and
- Burpengary – Narangba.

8.4.3 High Need

High need for commercial office floor space is categorised as incremental demand in excess of 30,000m^2 by 2031. High need catchments are:

- Griffin – Mango Hill; and
- Caboolture – Morayfield.

9 RETAIL AND COMMERCIAL CATCHMENT NEED SUMMARY

This section gives an indication of the level of need for the retail and commercial catchments within Moreton Bay Regional Council; need is an interaction of supply and demand. Sections 7 and 8 of this report estimated the demand for additional retail and commercial floor space and categorised the retail and commercial catchments into low, moderate or high need for additional retail and commercial provision. The retail and commercial catchments are categorised as follows:

- Low need:
  - Redcliffe[5];
  - Lawnton – Bray Park;
  - Rothwell – Deception Bay;
  - Bribie Island;
  - Caboolture East;
  - Caboolture Hinterland;
- Moderate need:
  - Albany Creek;
  - Burpengary – Narangba;
  - Caboolture Midwest;
  - Dakabin-Kallangur-Murrumba Downs;
  - Hills District / Samford;
  - Petrie / Dayboro;
- High need:
  - Caboolture Morayfield;
  - Strathpine;
  - Griffin – Mango Hill; and
  - Central Pine West.

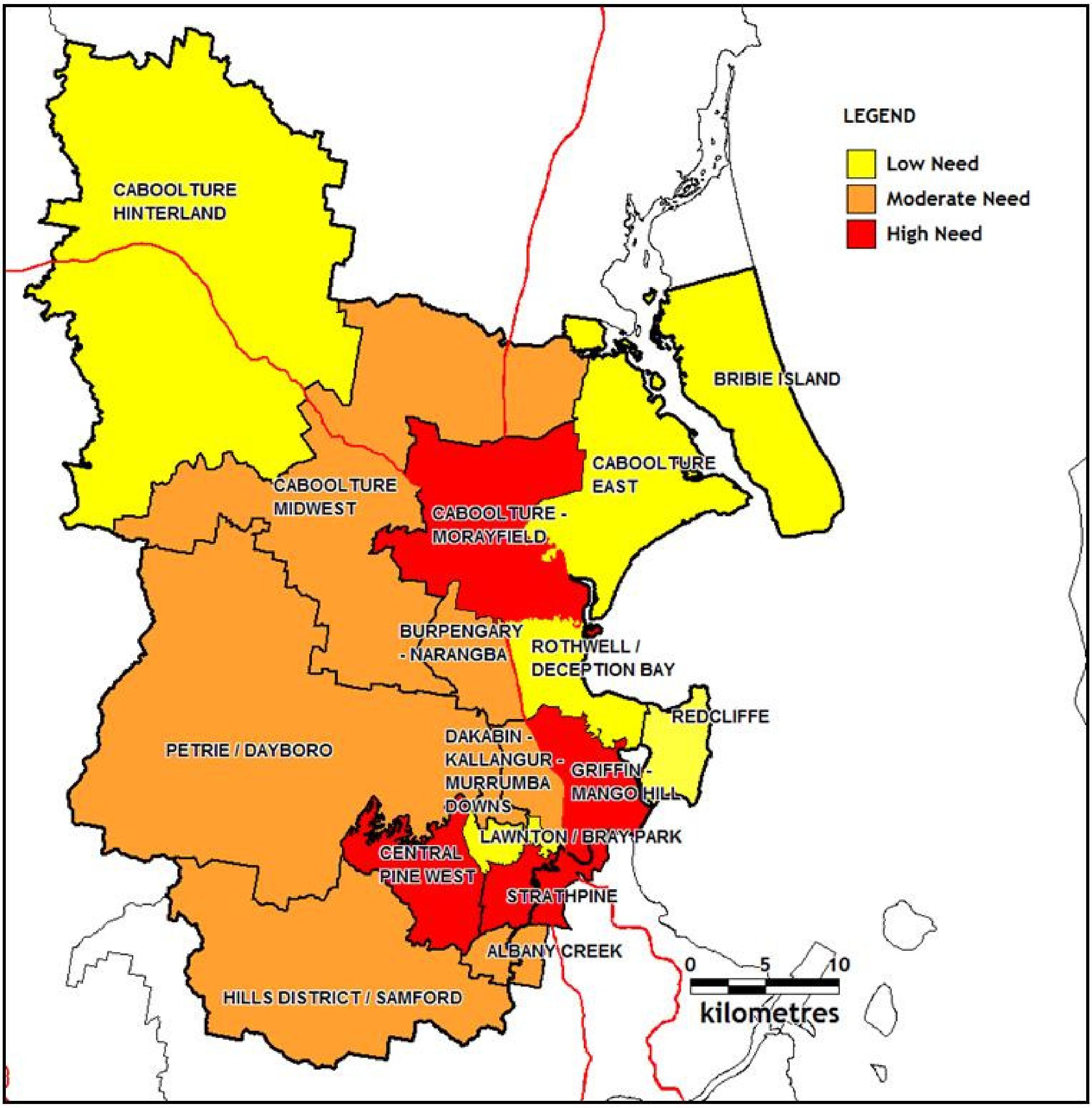
Additional floor space demand can be accommodated through the expansion / redevelopment of existing centres and / or the addition of new centres. The allocation of additional floor space is recommended in this section with a focus on the expansion of existing centres with an emphasis on allocation to higher order centres (i.e. Principal, Major and District centres) within each

[5] Although Redcliffe falls into the "moderate need" category for incremental floor space demand, the catchment is anticipated to have an oversupply of retail floor space to 2021 in excess of 1,000m² (Refer to Section 7 of this report). As such, the catchment has been categorised as "low need".

catchment. The designated centre zones for higher order centres within each catchment are shown in Figures 9.2 to 9.16.

This section reports need for additional floor space by catchment at 2021 and 2031, to be delivered as either centre expansions or as new centres. Need may be able to be satisfied by existing development approvals. Current development approvals by catchment areas are summarised in Appendix D. It is recommended that current approvals be considered when interpreting the findings outlined in this section.

Figure 9.1: Retail and Commercial Floor Space Need by Catchment



9.1 Low Need

9.1.1 Redcliffe

An oversupply of retail floor space is anticipated in the Redcliffe catchment in 2021, possibly indicating that centres are performing below identified benchmark trading levels. By 2031 Redcliffe is estimated to have a retail undersupply of 7,395m^2.

Commercial floor space in Redcliffe is estimated to have incremental demand of 5,100m^2 in 2021, increasing to 10,062m^2 by 2031.

The addition of retail and commercial floor space within Redcliffe may be accommodated through expansions and redevelopment of existing centres with the focus on the Redcliffe – Kippa Ring MAC, where the extent of undersupply is expected to be greatest.

Table 9.1 below provides a breakdown for the recommended provision of additional floor space demand in Redcliffe. Figure 9.2 below shows the Redcliffe – Kippa Ring MAC. There are a number of houses located within the designated centre zone. Remnant houses within centre zones represent breaks in centre activities within the centre. Utilisation of these sites to deliver a more integrated centre would often require redevelopment of neighbouring sites already used for centre activities.

Figure 9.3 below shows the Margate Village District Centre.

Table 9.1: Distribution of Additional Floor Space Demand, Redcliffe (sqm)

	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Redcliffe	**103,794**	**38,722**	**4,760**	**-5,100**	**-7,395**	**-10,062**
Redcliffe - Kippa Ring MAC	75,497	25,026	-	-3,060	-6,647	-6,037
Margate Village District Centre	14,110	6,598	-	-983	-373	-1,939
Redcliffe IGA	3,809	2,204	-	-328	-101	-648
Landsborough Avenue Local Centre	3,769	3,060	-	-456	-100	-899
Clontarf Bayside Plaza	1,752	1,238	-	-184	-46	-364
Redcliffe Coastal Strip Retail	1,418	220	-	-33	-37	-65
Midways Convenience Centre	1,115	120	-	-18	-29	-35
Mariners Plaza	950	140	-	-21	-25	-41
Ashmole Shopping Village	774	116	-	-17	-20	-34
Victoria Avenue Local Centre	600	-	-	-	-16	-

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Figure 9.2: Redcliffe – Kippa Ring MAC

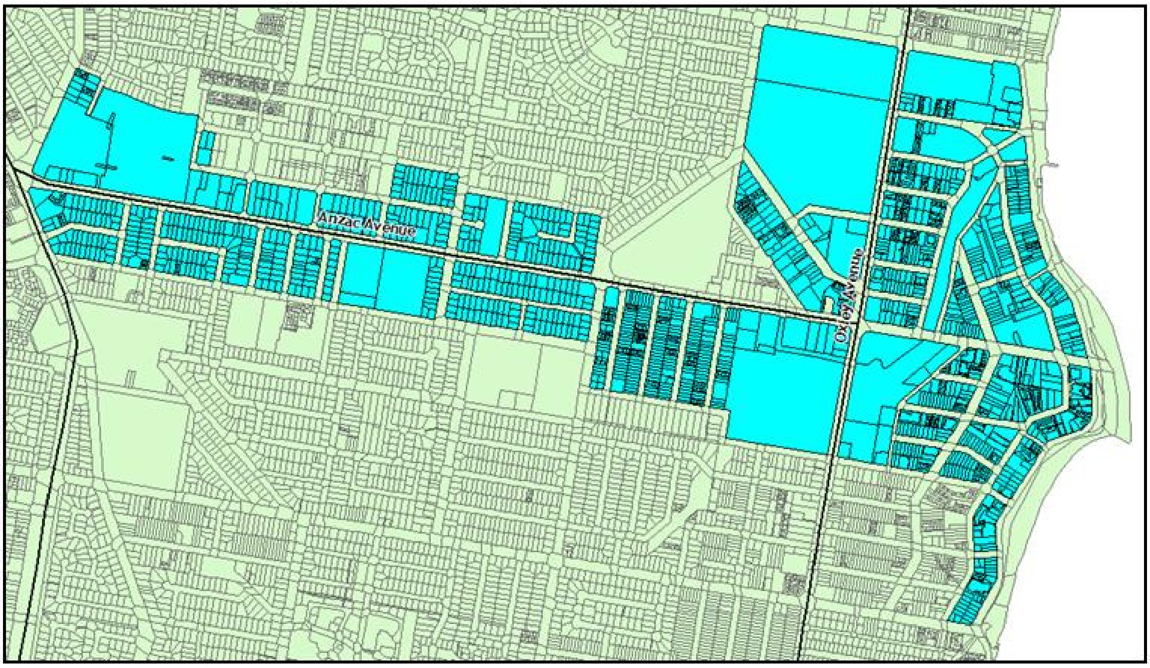


Figure 9.3: Margate Village District Centre

9.1.2 Lawnton – Bray Park

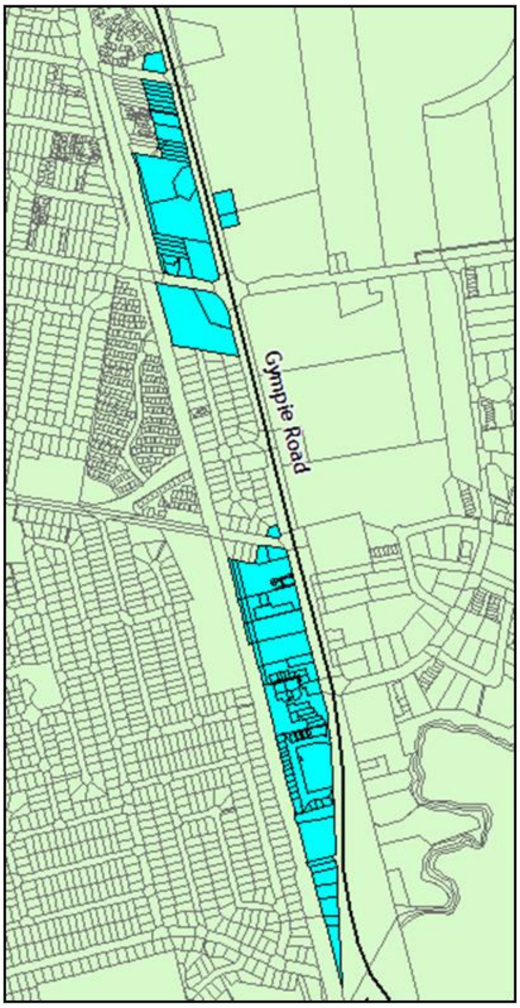
Retail floor space is expected to be oversupplied in Lawnton – Bray Park out to 2031. The commercial office market is estimated to have low incremental demand over the period to 2031. Figure 9.4 below shows the Lawnton Employment Area.

Table 9.2: Distribution of Additional Floor Space Demand, Lawnton - Bray Park (sqm)

	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Lawnton - Bray Park	**62,370**	**6,257**	**13,058**	**-521**	**5,945**	**-967**
Lawnton Employment Area	53,777	4,948	-	-312	-	-580
Kensington Village Shopping Centre	5,433	690	-	-110	-	-204
Ebert Place Shops	1,839	44	-	-7	-	-13
Francis Road Local Centre	663	-	-	-	-	-
Sparkes Road Local Centre	154	575	-	-91	-	-170
Ellis Street Local Centre	504	-	-	-	-	-

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Figure 9.4: Lawnton Employment Area



9.1.3 Rothwell – Deception Bay

The Rothwell – Deception Bay catchment is estimated to be oversupplied with retail floor space out to 2031.

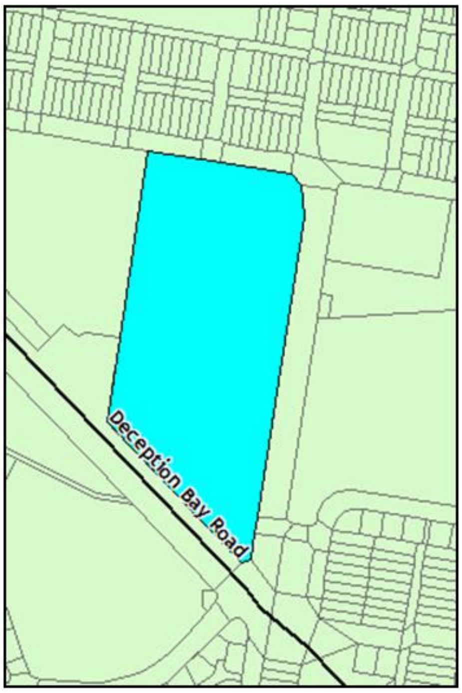
Demand for additional commercial office floor space is anticipated to be in the order of 2,328m^2 to 2,990m^2 by 2031. Table 9.3 below shows the suggested allocation of additional commercial office floor space demand. Figure 9.5 below shows the Deception Bay district centre.

Table 9.3: Distribution of Additional Floor Space Demand, Rothwell – Deception Bay (sqm)

	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Rothwell - Deception Bay	**69,588**	**5,267**	**13,811**	**-2,328**	**4,682**	**-2,990**
Deception Bay District Centre	23,144	2,395	-	-1,059	-	-1,360
Bunnings Rothwell & Harvey Norman Centre	17,682	-	-	-	-	-
Zone Rothwell	10,587	154	-	-68	-	-88
Deception Bay Strip Retail	10,354	1,768	-	-781	-	-1,004
Deception Bay IGA	2,336	-	-	-	-	-
Rothwell Local Centre	1,610	450	-	-199	-	-255
North Rise	1,259	200	-	-88	-	-114
Bay Markets	780	220	-	-97	-	-125
Burpengary Tavern	762	-	-	-	-	-
North Bay Shopping Centre	742	-	-	-	-	-
Bayview Shops	332	80	-	-35	-	-45

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Figure 9.5: Deception Bay District Centre



9.1.4 Bribie Island

By 2021, there is estimated to be demand for an additional 1,016m^2 of retail floor space and 1,101m^2 of commercial office floor space within the Bribie Island catchment.

By 2031, there is projected to be demand for additional floor space in the order of 2,909m^2 of retail floor space and 1,481m^2 of commercial office floor space in the Bribie Island catchment. Additional floor space could be supplied through the expansion of existing centres with focus on the Bellara District Centre (see Figure 9.6 below).

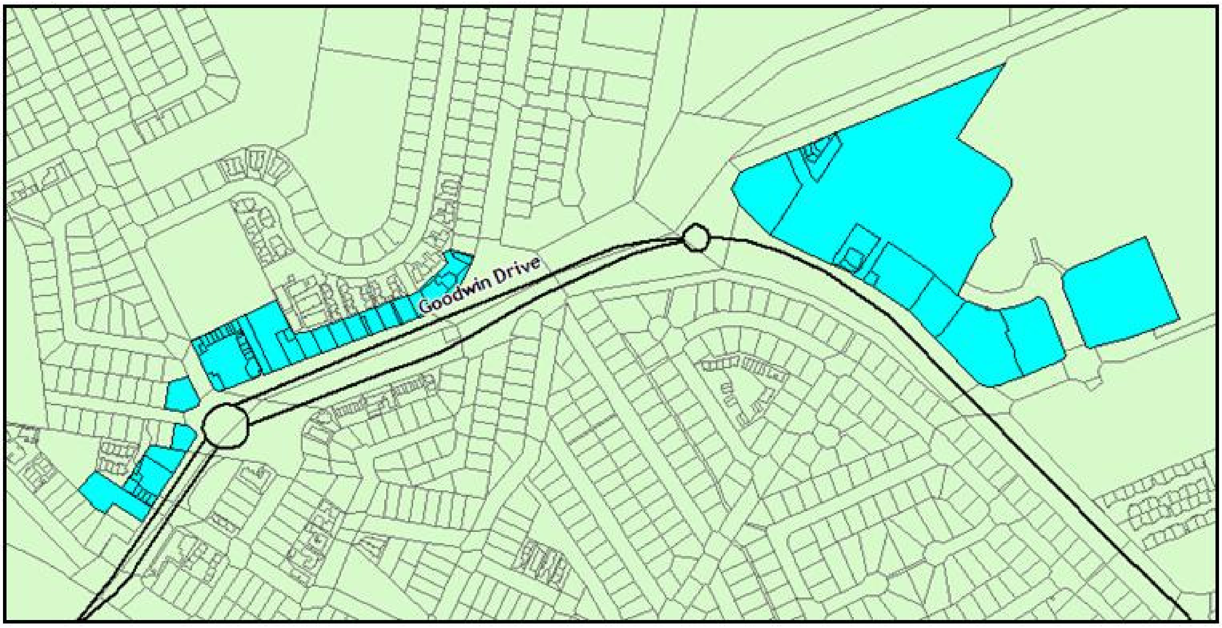
Table 9.4 below shows the suggested distribution of additional floor space demand within the Bribie Island catchment.

Table 9.4: Distribution of Additional Floor Space Demand, Bribie Island (sqm)

	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Bribie Island	**36,004**	**9,008**	**-1,016**	**-1,101**	**-2,909**	**-1,481**
Bellara District Centre	15,454	5,211	-436	-637	-1,249	-857
Banksia Beach Shopping Village	4,209	734	-119	-90	-340	-121
Bongaree	3,641	740	-103	-90	-294	-122
Welsby Parade Shops	3,448	1,050	-97	-128	-279	-173
Woorim	3,368	1,224	-95	-150	-272	-201
Aldi Centre - Bribie Island	2,050	50	-58	-6	-166	-8
Coolgarra Shops	1,523	-	-43	-	-123	-
Bribie Island Hotel	880	-	-25	-	-71	-
Marine Parade	387	-	-11	-	-31	-
Currong Shops	569	-	-16	-	-46	-
Cotterill Shops	241	-	-7	-	-19	-
Bellara Corner Store	120	-	-3	-	-10	-
Elkhorn Avenue	114	-	-3	-	-9	-

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Figure 9.6: Bellara District Centre



9.1.5 Caboolture East

There is estimated to be demand for an additional 2,945m^2 to 3,501m^2 of retail floor space and up to 244m^2 of commercial office floor space between 2021 and 2031. Additional retail and commercial floor space within the Caboolture East catchment could be provided by expansions to the existing centres. Table 9.5 below shows the suggested distribution of retail and commercial office floor space demand within the Caboolture East catchment. There are no higher order centres within the Caboolture East catchment.

Table 9.5: Distribution of Additional Floor Space Demand, Caboolture East (sqm)

	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Caboolture East	**6,625**	**1,432**	**-2,945**	**-200**	**-3,501**	**-244**
The Village Sandstone Point	2,503	501	-1,113	-70	-1,323	-85
Beachmere Plaza	2,254	436	-1,002	-61	-1,191	-74
Ningi	1,152	379	-512	-53	-609	-65
Toorbul	516	-	-229	0	-273	0
Donnybrook	200	116	-89	-16	-106	-20

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

9.1.6 Caboolture Hinterland

By 2031, there is projected to be demand for additional floor space in the order of 4,499m^2 of retail floor space and 864m^2 of commercial office floor space. Incremental expansions to existing centres would provide the additional floor space demanded. There are no higher order centres within the Caboolture Hinterland catchment.

Table 9.6 below shows the suggested distribution of additional floor space provision within the Caboolture Hinterland catchment.

Table 9.6: Distribution of Additional Floor Space Demand, Caboolture Hinterland (sqm)

	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Caboolture Hinterland	**12,609**	**770**	**-567**	**-414**	**-4,499**	**-864**
Woodford Shopping Centre	4,962	-	-223	0	-1,771	-
Woodford Strip Retail	4,577	770	-206	-414	-1,633	-864
Woodford Central Shopping Centre	1,956	-	-88	0	-698	-
D'Aguilar	1,114	-	-50	0	-398	-

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

9.2 Moderate Need

For catchments with moderate need for additional retail and commercial floor space vacant allotments were identified within centre zones with large future demand (e.g. principal, major and district centre activity zones). The identification of vacant allotments within these zones gives an indication of the potential for centre expansion and / or the development of new centres within the zone. There are instances of under-utilised land (i.e. houses and under-utilised allotments within the centre zone) within higher order centres. House sites located within centre zones represent opportunities for the provision of additional floor space within the zone. However, remnant houses within centre zones represent breaks in centre activities within the centre. As a result, the centre has developed around remnant houses. Utilisation of these sites to deliver a more integrated centre would often require redevelopment of neighbouring sites already used for centre activities.

9.2.1 Albany Creek

In 2021, there is anticipated to be demand for an additional 11,716m^2 of retail floor space and 1,915m^2 of commercial office floor space in Albany Creek. By 2031, there is anticipated to be demand for additional retail and commercial office floor space in the order of 18,047m^2 and 3,614m^2 respectively.

Table 9.7 below provides an indication of the appropriate distribution of additional retail and commercial office floor space across existing centres (with a focus on expanding the Albany Creek District Centre) and potentially new centres within the catchment.

Table 9.7: Distribution of Additional Floor Space Demand, Albany Creek (sqm)

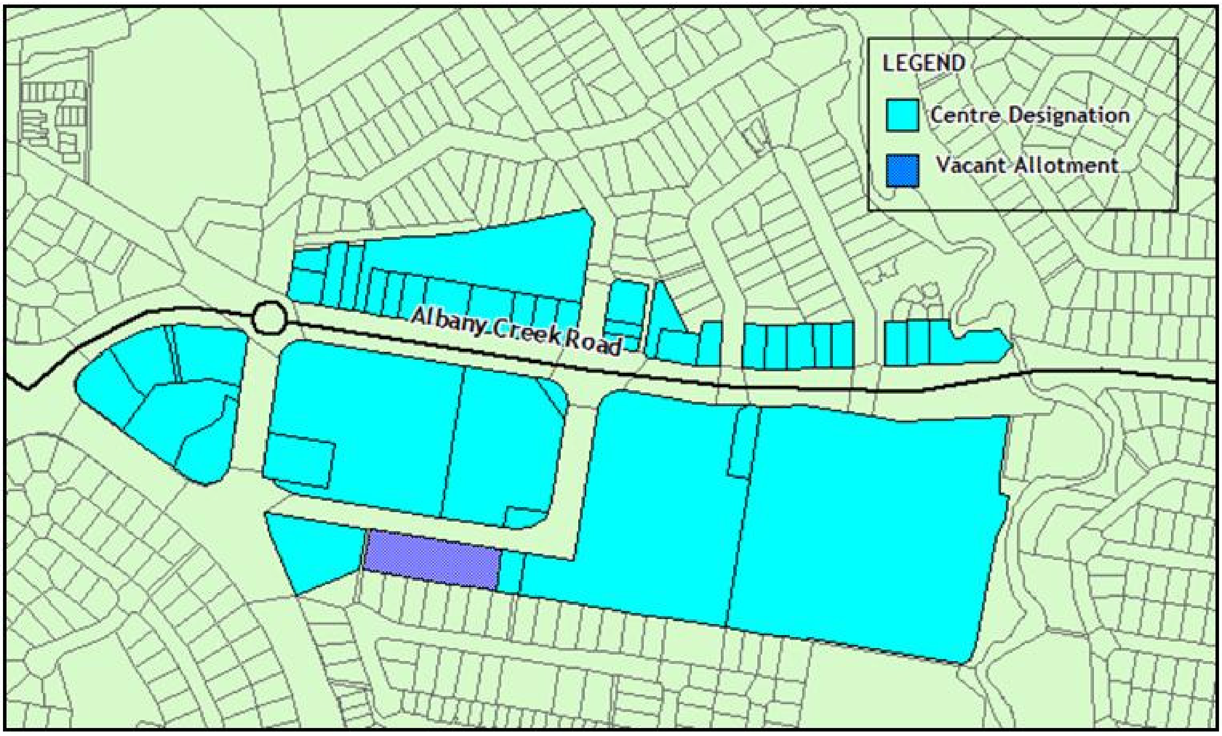
	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Albany Creek	27,589	9,422	-11,716	-1,915	-18,047	-3,614
Albany Creek District Centre	18,467	6,481	-4,705	-931	-7,248	-1,757
Woolworths Market Place	4,694	167	-1,196	-11	-1,842	-21
Albany Place	2,604	1,613	-663	-232	-1,022	-437
Dawn Road Local Centre	1,524	-	-388	0	-598	0
Radius Medical Centre	300	1,161	-76	-167	-118	-315
New Centres	-	-	-4,686	-575	-7,219	-1,084

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Vacant Allotments within the Albany Creek District Centre

There was one vacant allotment identified within the Albany Creek District Centre of approximately 0.5 hectares. Future floor space demand could be accommodated through the expansion / redevelopment of existing centres (including the Albany Creek Hotel site) and centre development on the vacant allotment identified in Figure 9.7 below. Houses within the centre zone are mostly converted houses.

Figure 9.7: Albany Creek District Centre



9.2.2 Burpengary - Narangba

There is estimated to be sufficient provision of retail floor space within the Burpengary – Narangba catchment to 2021 and demand for an additional 2,985m^2 of commercial office floor space.

By 2031, there is projected demand for an additional 16,697m^2 of retail floor space and 10,003m^2 of commercial office floor space. The provision of additional floor space demand is split between existing centres moving up the centres network hierarchy and the provision of new centres.

Table 9.8: Distribution of Additional Floor Space Demand, Burpengary - Narangba (sqm)

	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Burpengary - Narangba	**31,993**	**5,244**	**867**	**-2,985**	**-16,697**	**-10,003**
Burpengary District Centre	24,866	4,162	-	-1,658	-7,787	-5,557
Narangba Valley Shopping Centre	2,872	218	-	-87	-899	-291
Narangba Village	1,411	408	-	-163	-442	-545
FoodWorks Burpengary	990	-	-	-	-310	-
Chooks Corner	805	-	-	-	-252	-
Woodpecker Tavern	729	-	-	-	-228	-
Narangba Station Plaza	240	456	-	-182	-75	-609
Oakey Flat Road	80	-	-	-	-25	-
New Centres	-	-	-	-895	-6,679	-3,001

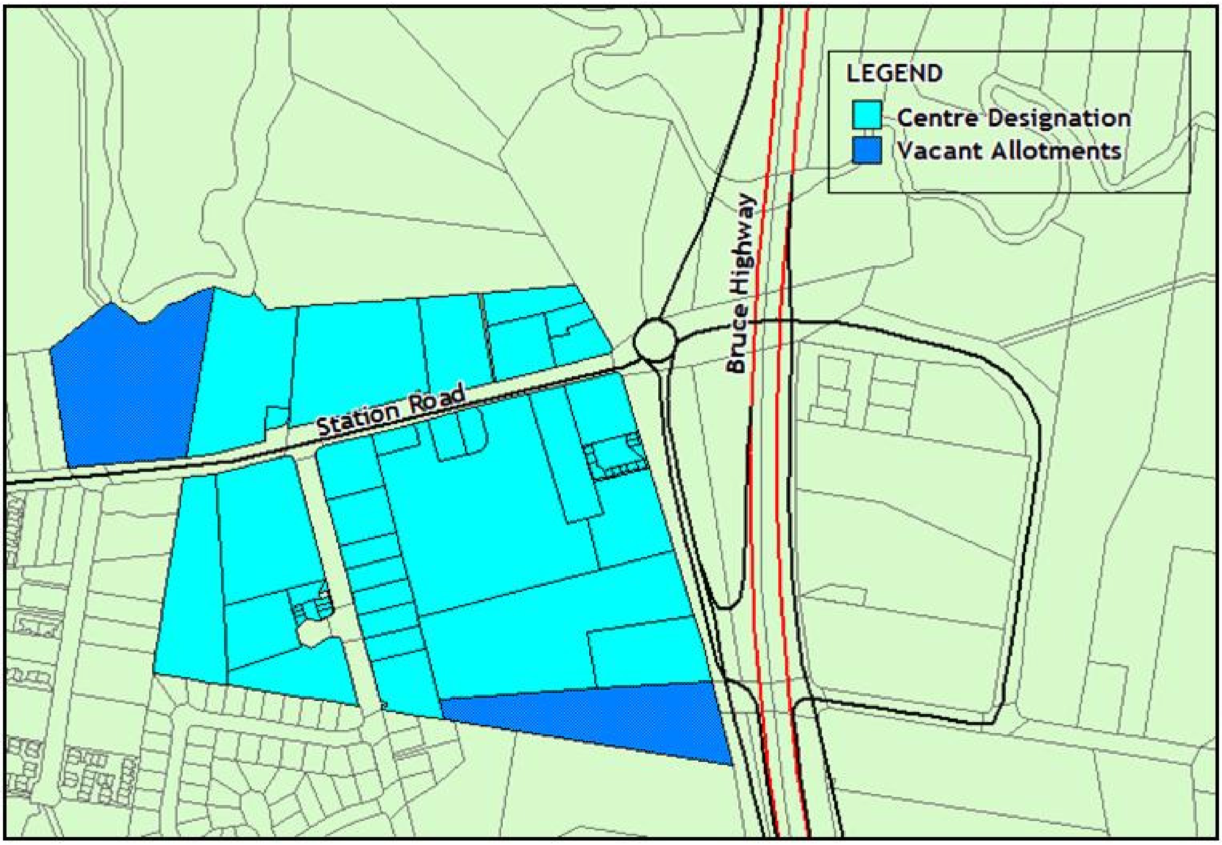
Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Vacant Allotments within Burpengary District Centre

There were two vacant allotments identified within the Burpengary district centre with a combined area of 3.9 hectares. There is potential for the expansion of the existing centres within the Burpengary District Centre and / or new centres. With the redevelopment potential of existing sites and availability of vacant sites the Burpengary District Centre zone appears to be of sufficient size.

Figure 9.8 below shows the vacant allotments within the Burpengary District Centre.

Figure 9.8: Vacant Allotments, Burpengary District Centre



9.2.3 Caboolture Midwest

Within the Caboolture Midwest catchment there is projected to be demand for an additional 18,006m^2 to 23,425m^2 of retail floor space and 680m^2 to 1,448m^2 of commercial office floor space between 2021 and 2031. Table 9.9 below shows the suggested distribution of additional retail and commercial floor space within Caboolture Midwest, with provision for the development of new centres.

Table 9.9: Distribution of Additional Floor Space Demand, Caboolture Midwest (sqm)

	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Caboolture Midwest	**2,561**	**280**	**-18,006**	**-680**	**-23,425**	**-1,448**
Wamuran	1,371	280	-5,784	-476	-7,524	-1,014
Elimbah	640	-	-2,700	-	-3,512	-
Excelsior Park Village	550	-	-2,320	-	-3,019	-
New Centres	-	-	-7,203	-204	-9,370	-435

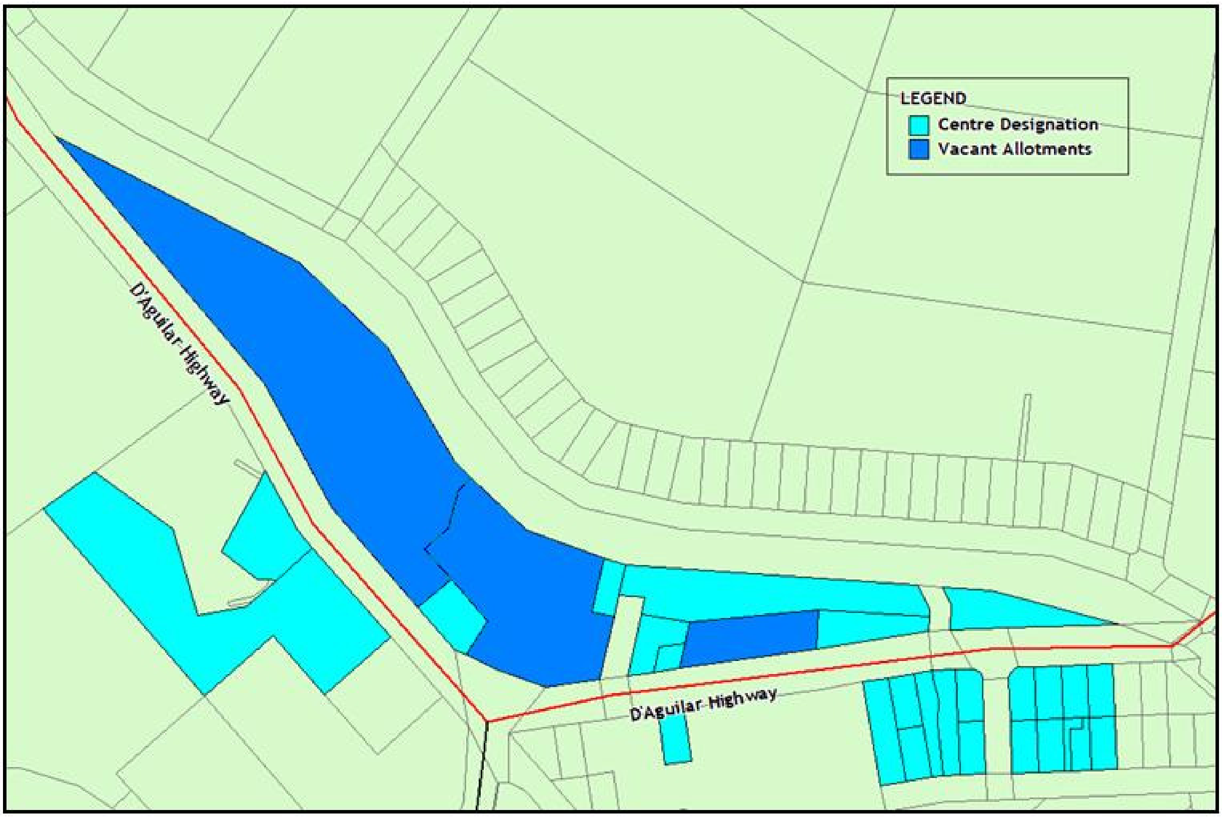
Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Vacant Allotments within Wamuran Designated Centre

Although Wamuran is not a higher order centre (i.e. Principal, Major or District centre), the centre currently has the largest provision of floor space within the catchment. As the catchment is anticipated to have a moderate demand for future floor space provision the vacant allotments within the Wamuran designated centre have been identified.

There were three vacant allotments identified within the Wamuran designated centre with a combined area of 4.6 hectares. Hence, centre expansion could be accommodated on vacant allotments within the centre zone. Figure 9.9 below shows vacant allotments with the potential to accommodate expansion and / or new centres within the Wamuran designated centre within the Caboolture Midwest catchment.

Figure 9.9: Vacant Allotments, Wamuran Designated Centre



9.2.4 Dakabin-Kallangur-Murrumba Downs

There is projected to be demand for an additional 16,045m^2 of retail floor space and 3,167m^2 of commercial office floor space within the Dakabin-Kallangur-Murrumba Downs catchment by 2031. Table 9.10 below shows the suggested distribution of additional retail and commercial floor space within Dakabin-Kallangur-Murrumba Downs, with provision for the development of new centres.

Table 9.10: Distribution of Additional Floor Space Demand, Dakabin-Kallangur-Murrumba Downs (sqm)

	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Dakabin-Kallangur-Murrumba Downs	**38,607**	**7,417**	**-10,279**	**-2,388**	**-16,045**	**-3,167**
Kallangur District Centre	21,382	5,838	-3,416	-1,128	-5,332	-1,496
Lilly Brook Shopping Village	6,887	357	-1,100	-69	-1,717	-91
Murrumba Downs Shopping Centre	5,137	998	-821	-193	-1,281	-256
Castle Hill Centre	2,479	224	-396	-43	-618	-57
Anzac Avenue Local Centre	1,536	-	-245	-	-383	-
Dakabin Village	831	-	-133	-	-207	-
Kallangur Village Shopping Centre	355	-	-57	-	-89	-
New Centres	-	-	-4,112	-955	-6,418	-1,267

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Vacant Allotments within Kallangur District Centre

There was one vacant allotment identified within the Kallangur district centre with an area of approximately 0.2 hectares. There is limited potential for redevelopment and centre expansion within the Kallangur district centre zone. Therefore, given the additional retail and commercial floor space demand within the district centre to 2031, it may be appropriate to expand the designated centre zone. It is recommended that expansion of the centre zone should occur to the north rather than the south, brining properties fronting Boardman Street into the centre zone. Due to the grid based road network, expanding the centre zone north would allow for better permeability between the existing and future centres.

Alternatively the former Tulip Town site could be considered for the provision of additional floor space by establishing a new centre as per the Pine Rivers planning scheme. The former Tulip Town site was zoned a central and local business zone in the planning scheme, adjacent a major employment centres locality.

Figure 9.10 below shows the vacant allotment within the Kallangur District Centre, the former Tulip Town site and the potential area for centre zone expansion.

Figure 9.10: Vacant Allotments, Kallangur District Centre

9.2.5 Hills District / Samford

Within the Hills District / Samford catchment there is anticipated to be demand for an additional 14,259m^2 to 19,340m^2 of retail floor space and 1,355m^2 to 2,307m^2 of commercial office floor space between 2021 and 2031.

Table 9.11 below provides an indication of the appropriate distribution of additional floor space across existing centres (with a focus on expanding the Arana Hills District Centre) and potentially new centres within the catchment.

Table 9.11: Distribution of Additional Floor Space Demand, Hills District / Samford (sqm)

	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Hills District/Samford	**39,098**	**8,871**	**-14,259**	**-1,355**	**-19,340**	**-2,307**
Arana Hills District Centre	19,284	2,791	-4,220	-299	-5,723	-508
Samford Village Main Street Retailing	5,179	2,444	-1,133	-261	-1,537	-445
Ferny Way South	2,624	1,472	-574	-157	-779	-268
Everton Hills Shopping Centre	2,172	255	-475	-27	-645	-46
Samford Valley	2,167	247	-474	-26	-643	-45
Samford Central	2,029	368	-444	-39	-602	-67
Everton Shopping Village	1,280	282	-280	-30	-380	-51
Fernlands Village	931	368	-204	-39	-276	-67
Samford Country Centre	812	200	-178	-21	-241	-36
Chinook Street Local Centre	725	-	-159	-	-215	-
170 Patricks Road	618	334	-135	-36	-183	-61
Arlington Court	554	-	-121	-	-164	-
Ferny Way Local Centre	478	-	-105	-	-142	-
Mt Glorious	245	110	-54	-12	-73	-20
New Centres	-	-	-5,704	-407	-7,736	-692

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

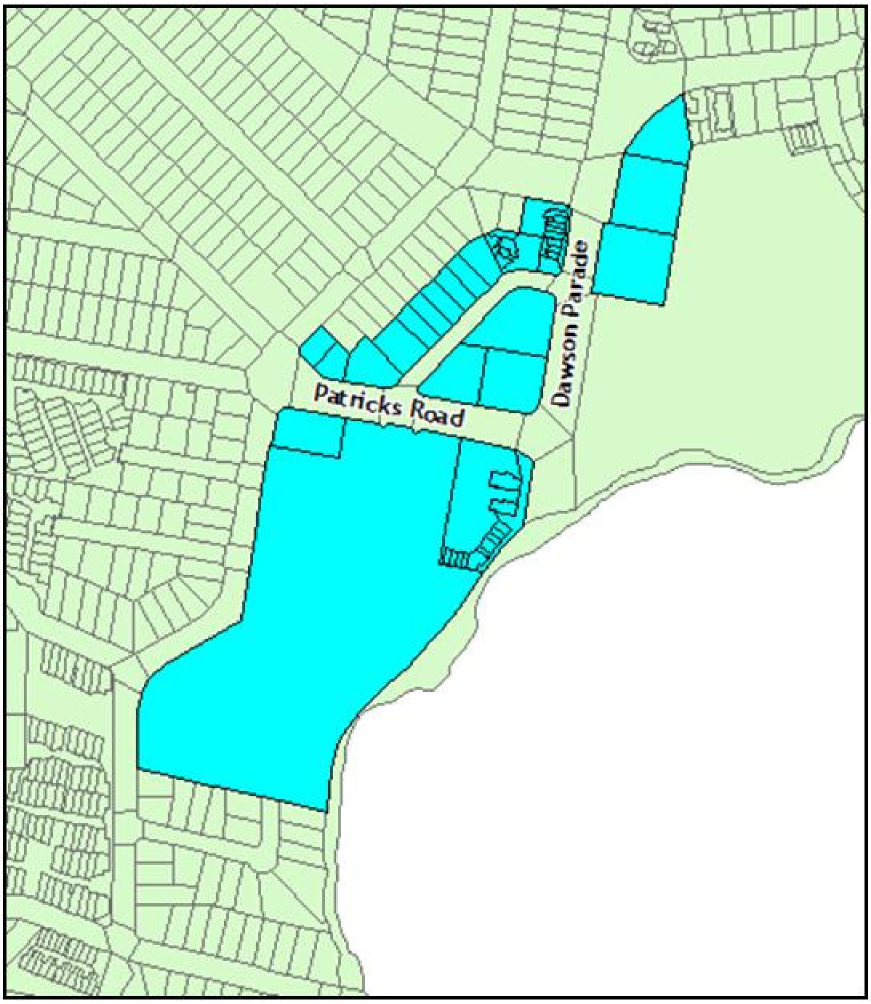
Vacant Allotments within Arana Hills District Centre

No vacant allotments were identified within the Arana Hills District Centre. However, there is potential to accommodate future floor space demand with the redevelopment of Arana Hills Plaza. There is remnant housing located within the centre zone, including converted houses.

Utilisation of house sites within the centre and expansion of the centre zone would require redevelopment of neighbouring sites already used for centre activities to deliver a more integrated centre.

Figure 9.11 below shows the Arana Hills District Centre.

Figure 9.11: Arana Hills District Centre



9.2.6 Petrie / Dayboro

Within the Petrie / Dayboro catchment, there is projected to be demand for additional 17,148m^2 of retail floor space and 983m^2 of commercial office floor space by 2031. Table 9.12 below shows the distribution of additional floor space demand with provision for new centres.

Table 9.12: Distribution of Additional Floor Space Demand, Petrie / Dayboro (sqm)

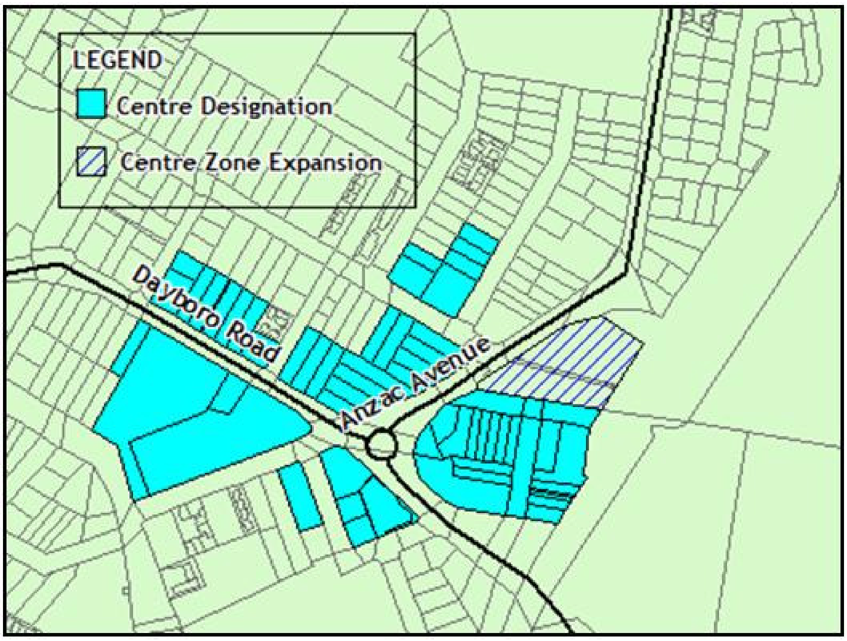
	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Petrie / Dayboro	**17,476**	**4,429**	**-14,342**	**-633**	**-17,148**	**-983**
Petrie Village District Centre	9,145	1,318	-4,503	-132	-5,384	-205
Dayboro	5,948	2,928	-2,929	-293	-3,502	-455
Beeville Road Local Centre	2,384	182	-1,174	-18	-1,403	-28
New Centres	-	-	-5,737	-190	-6,859	-295

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Vacant Allotments within Petrie Village District Centre

There were no vacant allotments identified within the Petrie Village district centre. Accordingly, it might be appropriate to expand the designated Petrie Village centre zone. The Village Holden site is located adjacent the centre zone. Expansion of the centre zone to include the Village Holden site would be appropriate to accommodate long term demand. There is remnant housing located within the centre zone, including converted houses. Utilisation of house sites within the centre and expansion of the centre zone would require redevelopment of neighbouring sites already used for centre activities to deliver a more integrated centre.

Figure 9.12: Petrie Village District Centre



9.3 High Need

For catchments with high need for additional retail and commercial floor space, vacant allotments were identified within centre zones with large future demand (e.g. principal, major and district centre activity zones). The identification of vacant allotments within these zones gives an indication of the potential for centre expansion and / or the development of new centres within the zone. There are instances of under-utilised land (i.e. houses and under-utilised allotments within the centre zone) within higher order centres. House sites located within centre zones represent opportunities for the provision of additional floor space within the zone. However, remnant houses within centre zones represent breaks in centre activities within the centre. As a result, the centre has developed around remnant houses. Utilisation of these sites to deliver a more integrated centre would often require redevelopment of neighbouring sites already used for centre activities.

9.3.1 Caboolture - Morayfield

There is significant demand for additional retail and commercial office floor space within the Caboolture – Morayfield catchment in the order of an additional 104,797m^2 of retail floor space and 36,309m^2 of commercial office floor space by 2031. Within the Caboolture – Morayfield PAC, there is demand for an additional 84,204m^2 of additional retail floor space and 21,785m^2 of additional commercial office floor space by 2031.

Table 9.13 below shows the suggested distribution of additional floor space demand within the Caboolture – Morayfield catchment including provision for the expansion of existing centres and the addition of new centres.

Table 9.13: Distribution of Additional Floor Space Demand, Caboolture - Morayfield (sqm)

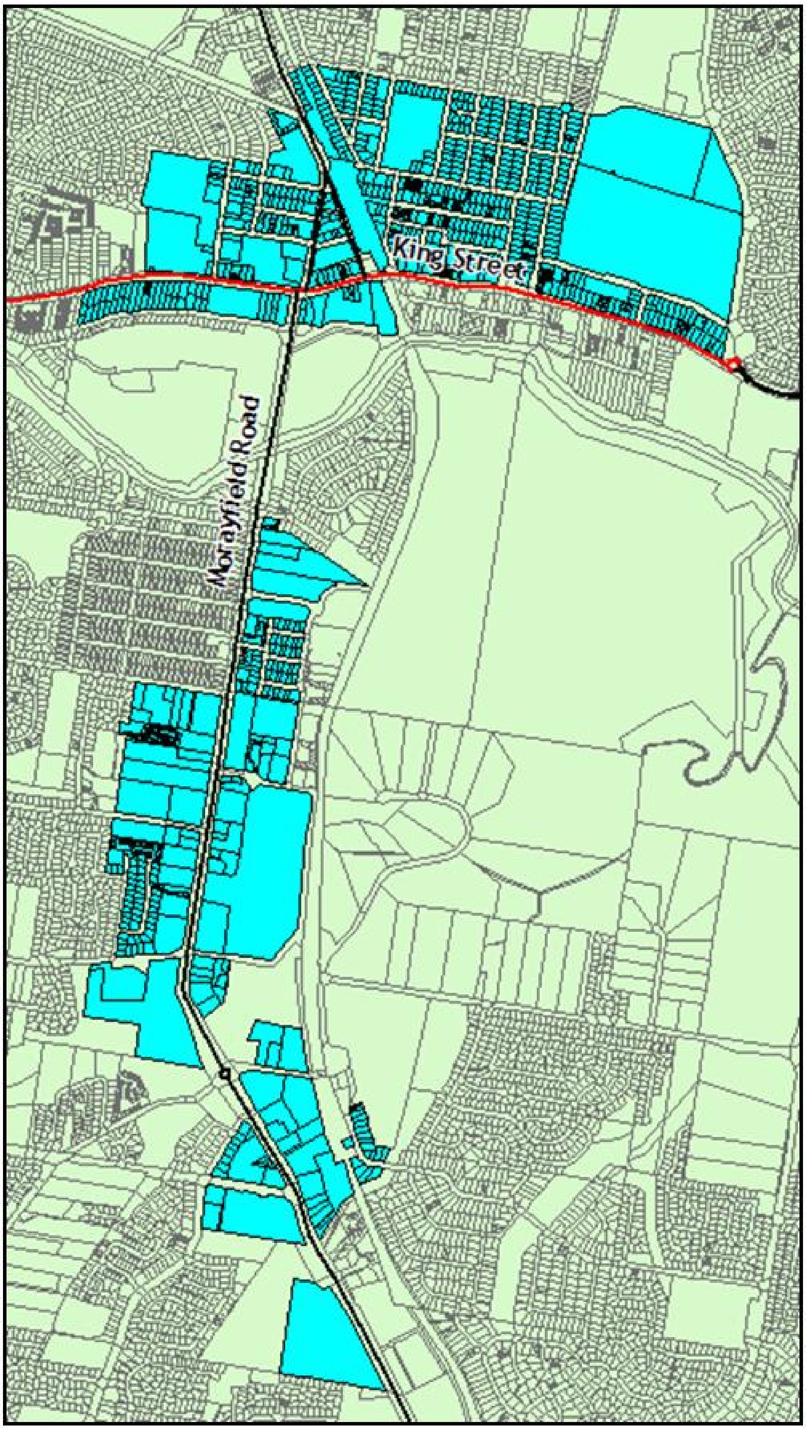
	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Caboolture Morayfield	**191,478**	**39,324**	-47,304	-19,487	**-104,797**	**-36,309**
Caboolture Morayfield PAC	175,764	37,068	-33,816	-11,692	-84,204	-21,785
Central Lakes Shopping Village	4,579	620	-1,572	-1,071	-2,400	-1,996
Lear Jet Centre	2,493	160	-856	-276	-1,307	-515
The Hub Convenience Centre	2,204	1,250	-757	-2,159	-1,155	-4,023
Trader Dukes Centre	1,930	-	-663	-	-1,012	-
Glenwood Drive Centre	1,205	-	-414	-	-632	-
Parkridge Shopping Village	1,013	110	-348	-190	-531	-354
Bellmere Shopping Centre	848	-	-291	-	-445	-
Hillcrest Gardens Shopping Centre	545	116	-187	-200	-286	-373
The Big Fish Tavern	470	-	-161	-	-246	-
Argyll Street Centre	277	-	-95	-	-145	-
Tullawong Corner Store	150	-	-51	-	-79	-
New Centres	-	-	-8,093	-3,897	-12,356	-7,262

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Vacant Allotments within the Caboolture - Morayfield PAC

There were no vacant allotments identified within the Caboolture – Morayfield PAC. Figure 9.13 below shows the boundary of the Caboolture – Morayfield PAC. The Caboolture – Morayfield PAC covers a large area and as such there is significant opportunity for the redevelopment and / or expansion of existing centres. There are also a number of house sites located within the centre zone including converted houses.

Figure 9.13: Caboolture Morayfield PAC



9.3.2 Griffin – Mango Hill

The centres network within Griffin – Mango Hill is centred around the North Lakes MAC. By 2031, there is projected to be demand for an additional 128,936m^2 of retail floor space and 46,916m^2 of commercial office floor space. Within the North Lakes MAC, there is demand for an additional 102,923m^2 of retail floor space and 28,150m^2 of commercial office floor space by 2031.

Table 9.14 below shows the suggested distribution of additional retail and commercial floor space within the Griffin – Mango Hill catchment including the expansion of existing centres to higher order centres and the provision for the addition of new centres.

Table 9.14: Distribution of Additional Floor Space Demand, Griffin - Mango Hill (sqm)

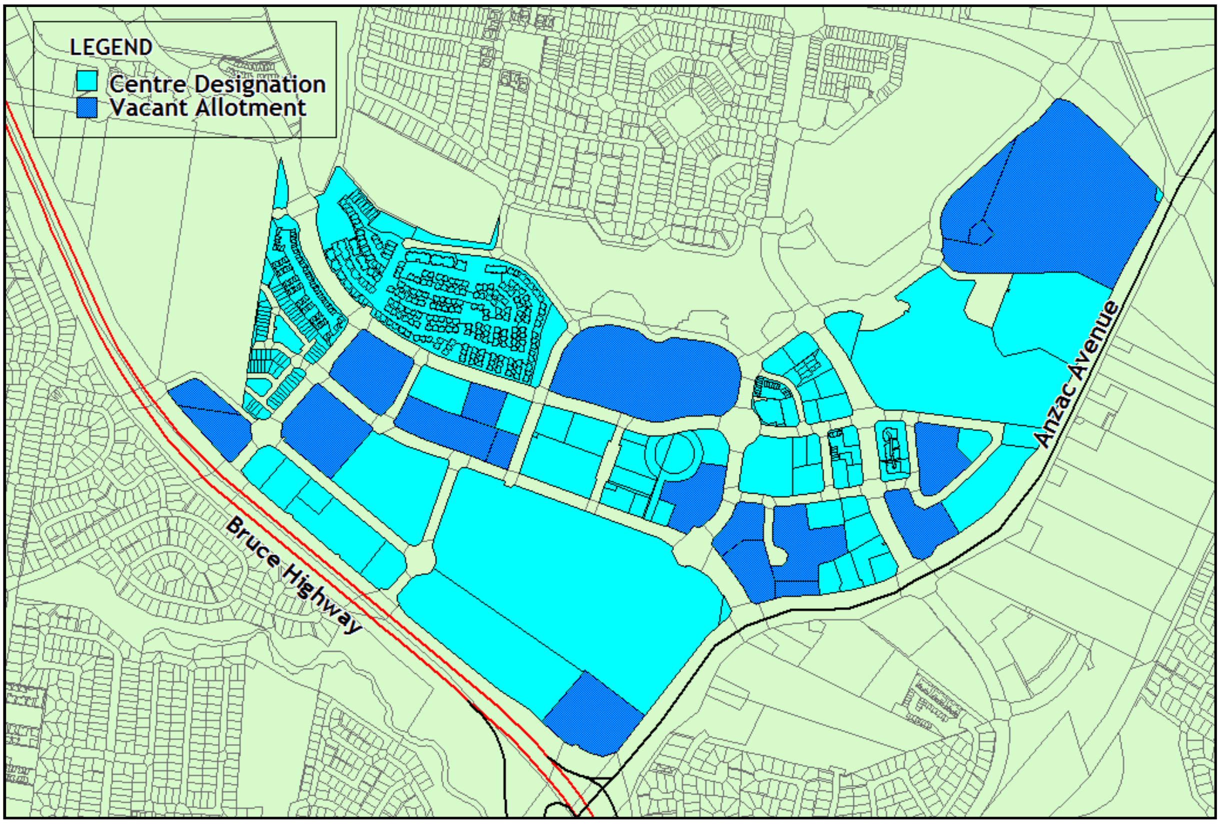
	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Griffin - Mango Hill	**91,134**	**23,857**	**-82,543**	**-21,962**	-128,936	-46,916
North Lakes MAC	87,128	21,364	-64,577	-13,177	-102,923	-28,150
Astley Parade Local Centre	3,046	2,304	-5,464	-4,059	-7,912	-8,672
North Lakes Convenience Centre	960	189	-1,722	-333	-2,494	-711
New Centres	-	-	-10,779	-4,392	-15,608	-9,383

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Vacant Allotments within North Lakes MAC

Figure 9.14 shows the vacant allotments within North Lakes as of May 2013. There were 19 vacant allotments within the North Lakes MAC with a combined area of 79.2 hectares. There would appear to be sufficient space within the designated North Lakes MAC to accommodate the additional retail and commercial floor space demand to 2031.

Figure 9.14: Vacant Allotments, North Lakes MAC



9.3.3 Strathpine

There is demand for an additional 37,481m^2 of retail floor space and 18,174m^2 of commercial office floor space by 2031 within the Strathpine catchment. Within the Strathpine MAC, there is demand for an additional 29,694m^2 of retail floor space and 10,904m^2 of commercial office floor space.

Table 9.15 below shows the suggested distribution of additional retail and commercial floor space within the Strathpine catchment including the expansion of existing centres to higher order centres and the provision for the addition of new centres.

Table 9.15: Distribution of Additional Floor Space Demand, Strathpine (sqm)

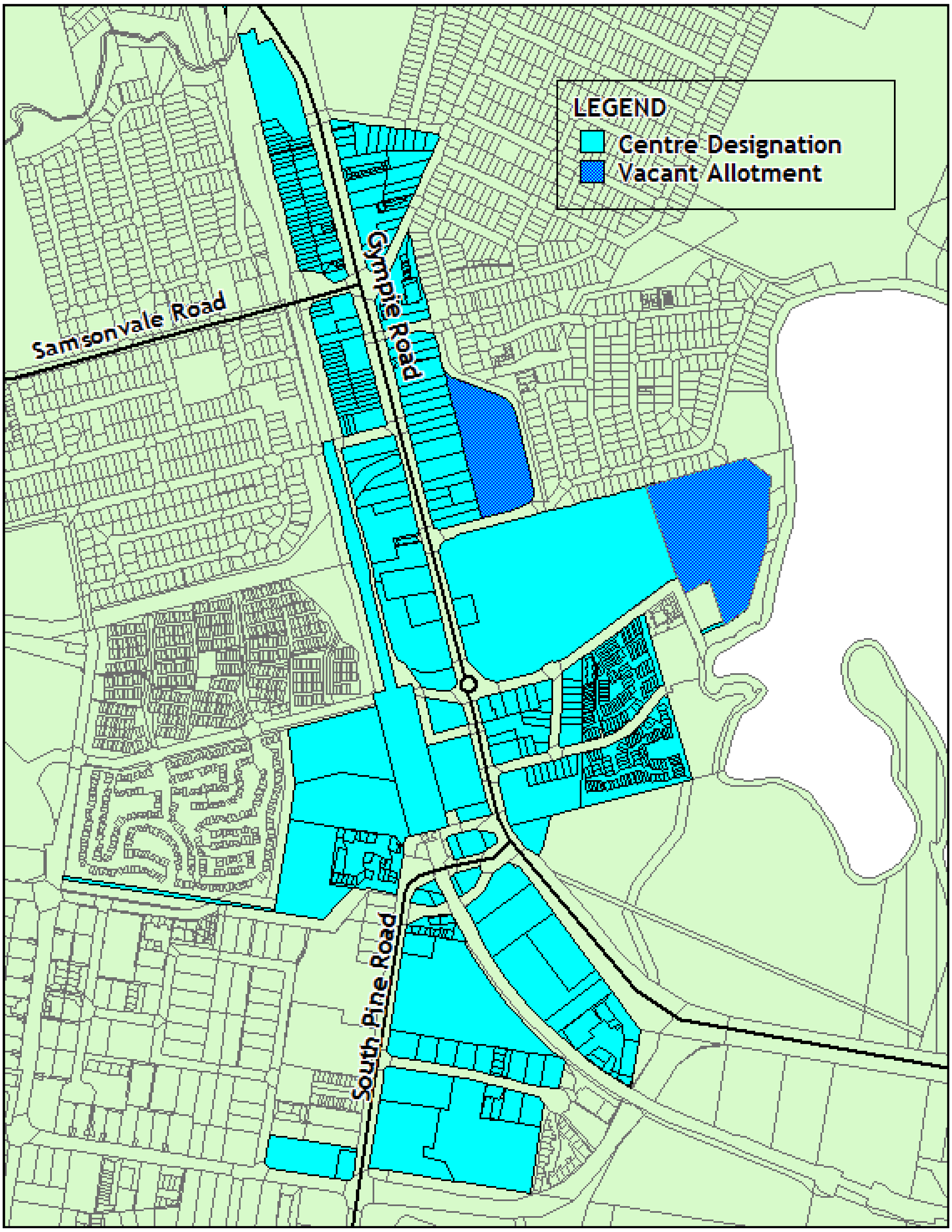
	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Strathpine	**82,906**	**26,259**	**-22,220**	**-11,170**	**-37,481**	**-18,174**
Strathpine MAC	77,699	25,516	-13,044	-6,702	-26,694	-10,904
Lincoln Centre	2,520	955	-1,305	-1,257	-1,535	-2,045
Sandalwood Shopping Village	158	158	-82	-207	-96	-337
Bell's Corner	1,313	585	-680	-770	-800	-1,253
Eatons Hill Hotel & Function Centres	3,095	-	-1,603	0	-1,885	-
New Centres	-	-	-5,505	-2,234	-6,472	-3,635

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Vacant Allotments within the Strathpine MAC

There was one vacant allotment identified within the Strathpine MAC with an area of 3.1 hectares. There was also an underutilised allotment identified, with approximately one-third of the allotment vacant. Figure 9.15 below shows the vacant allotments within the Strathpine MAC. There might be potential therefore for the expansion of existing centres and introduction of new centres within the Strathpine MAC to accommodate future floor space demand.

Figure 9.15: Vacant Allotments, Strathpine MAC



9.3.4 Central Pine West

Within the Central Pine West catchment, there is demand for an additional 35,923m² to 49,197m² of retail floor space and 1,935m² to 8,262m² of commercial office floor space over the period 2021 to 2031.

The Central Pine West catchment is a relatively high growth area (population growth rate of 2.3% per annum) and currently has low provision of retail and commercial floor space (13,149m^2). Table 9.16 indicates that there is a high level of projected future need for centre activities within Central Pine West. Because of the significant projected future need and the importance of centre locations in anchoring the urban form, it is recommended that the identification of new centre sites in Central Pine West is the subject of detailed planning.

Table 9.16 below shows the suggested distribution of additional retail and commercial floor space within the Central Pine West catchment including the expansion of existing centres to higher order centres and the provision for the addition of new centres.

Table 9.16: Distribution of Additional Floor Space Demand, Central Pine West (sqm)

	Existing Supply		Additional Demand 2021		Additional Demand 2031	
	Retail	Commercial	Retail	Commercial	Retail	Commercial
Central Pine West	**11,042**	**2,107**	**-35,923**	**-3,925**	**-49,197**	**-8,262**
Warner Village	8,248	1,298	-10,733	-1,935	-14,699	-4,072
Bunya Park Drive Convenience Centre	1,829	571	-2,380	-851	-3,260	-1,791
Eatons Hill Convenience Centre	965	238	-1,256	-355	-1,720	-747
New Centres	-	-	-21,554	-785	-29,518	-1,652

Note: a negative balance indicates an undersupply of floor space
Source: Economic Associates estimates

Vacant Allotments within Warner Village District Centre

While there were no vacant allotments identified within the Warner Village designated centre, there are a number of underutilised allotments that could potentially accommodate additional retail and commercial floor space demand to 2031. Figure 9.16 below shows the centre boundary for the Warner Village district centre.

Figure 9.16: Warner Village District Centre

10 RECOMMENDATIONS & STRATEGY

10.1 Background & Context

Having derived a preferred future activity centres network on the basis of projected need and demand, it is necessary to ensure issues of statutory compliance, alignment and composition are observed in identifying a consistent statutory planning implementation framework.

This section outlines an implementation framework for the recommendations of the Moreton Bay Regional Council Retail and Commercial Sector Needs Study. The approaches recommended are cognisant of the need for statutory compliance, consistency and the alignment of centres policy at regional, district and local levels, while also adhering to the mandatory content and structure requirements of the Queensland Planning Provisions (QPP). Recognising the progressive evolution in the QPP as encapsulated within draft Version 3 and its likely adoption in advance of the finalisation of the Moreton Bay Regional Planning Scheme, this version has been used as the recognised reference informing planning scheme content and drafting.

10.2 Guiding Principles

The guiding principles outlined in Chapter 3 of this study are those of specific relevance to the manner in which key retail, commercial and centres recommendations of the study are implemented. At the outset, it must be noted that the planning implementation mechanisms suggested as a vehicle to implement key study outcomes comprise only one of a number of potential implementation approaches which achieve QPP compliance.

10.3 Drafting Principles

Version 3.0 of the QPP is predicated on a series of Planning Scheme drafting principles (pp. 1-2). In deriving these principles the Queensland Government has sought to ensure planning schemes remain efficient by:

"........

- keeping the planning scheme focused as a statutory instrument for strategic land use planning and development assessment. Supporting documents are used as mechanisms for assisting with interpretation, explaining the basis for decision-making and explaining how the planning scheme operates, but do not form part of the planning scheme;
- reflecting and integrating state planning instruments such as regional plans and state planning polices;
- using land use allocation (i.e. zoning) as the base layer for assigning assessment categories and assessment criteria;
- incorporating overlay provisions where it is necessary to:
  - be sensitive to the effects of development;
  - constrain land or development;
  - identify valuable resources;

  - present opportunities for development;
- including local plans where finer grained planning is required at the local or district level;
- ensuring that the strategic framework is reflected and enabled by the scheme elements—zones and where used, overlays and local plans;
- using the level of assessment tables as the structural focus of the planning scheme by incorporating within them critical information for users, assessment categories and relevant assessment criteria.

  ....”

The Drafting Principles nominated by the QPP are as follows:

DP1 Achieving ecological sustainability, coordination and integration—users readily understand how the planning scheme measures seek to achieve ecological sustainability and how the matters dealt with by the planning scheme have been coordinated and integrated.

DP2 Applying and interpreting the planning scheme—users readily understand how to apply and interpret the planning scheme.

DP3 Focus on outcomes—planning schemes focus on the land use outcomes sought to be achieved both generally and specifically in the local government area.

DP4 Complying with and using the Sustainable Planning Act 2009 (the Act) operational rules—planning schemes comply with and effectively use the operational rules established by the Act.

DP5 Minimising regulation—assessment categories limit regulation to the minimum practicable to achieve the outcomes and level of community involvement sought.

DP6 Consistency of scheme structure and language—there is an appropriate degree of consistency of planning scheme structure and language within the State.

DP7 State planning instruments—the scheme includes measures to facilitate incorporation of state interests in the planning scheme.

The drafting principles inform the more detailed mandatory requirements of the QPP dealing with planning scheme composition, structure, formatting and drafting. The planning approaches and mechanisms recommended in section 10.5 below seek to provide an efficient and QPP compliant framework within which the commercial and retail recommendations can ultimately be implemented through the Moreton Bay Regional Council SPA Planning Scheme.

10.4 Alignment of Recommended Planning Approach with SEQ Regional Plan

10.4.1 The “Activity Centres Concept”

In simple terms, an Activity Centre can be defined as an identifiable concentration or focus of human activity, with such activity being derived from a synergistic mix of living, business, employment, service provision and social interaction opportunities.

The Activity Centre concept advanced under the SEQ Regional Plan represented a deliberate attempt to broaden the focus of centres planning policy beyond a traditional hierarchy of retail centres to recognise, foster and encourage the development of multi-functional centres which:

- Provided a foundation for economic growth through the synergistic co-location of a diverse mix of uses, the achievement of economies of agglomeration, and the more efficient concentration of goods and services;
- Provided a focus for government investment in major public transport, health, education cultural and entertainment facilities;
- Provided a focus for community and social interaction;
- Managed private travel demand by encouraging multi-purpose trips of lower frequency and less duration;
- Provided enhanced opportunities for land use and transport integration particular in respect of pedestrian, bicycle and public transport networks; and
- Provided interesting and diverse mixed-use residential environments.

Generally activity centres are distinguishable by the order, mix, size and intensity of their component uses, their location on the major nodes of the public transport system and their ability to attract high volumes of people and trips.

At the time of its preparation, the regional approach to planning for Activity Centres in SEQ purposefully sought to move towards a network-based approach to centres planning in preference to more traditional approaches based on a hierarchy of retail centres. This was in recognition of the following inherent benefits of a network-based approach to centres planning:

- **Consumer Behaviour and Private Travel Demand Management**: A hierarchy and more specifically a "retail orientated" hierarchy implies a rigid order and scale of facilities with consumers making use of a selected group of facilities at each level in the hierarchy. A network approach suggests consumers will make use of a number of facilities at each individual level of the centres network. This is more compatible with the notion of multi-function, mixed-use centres that encourage multi-purpose trips thereby more effectively managing private travel demand.
- **Non-Retail Uses**: A network-based approach was seen as more conducive to the concept of certain centres potentially having a primary non-retail function or role. In this context the economic contribution of specialist and emerging activity centres was sought to be actively recognised at the regional level.
- **Land Use and Transport Integration**: A network-based approach placed heightened emphasis on the interdependence of centres and the importance of linkages between centres of both similar and differing functional order and composition. From this perspective, a network approach more positively reinforces the integration of land use and transport, and specifically emphasises the importance of efficient and effective public transport networks within and between centres.
- **Relationship between Centres**: In addition to broadening the functional diversity of centres, a network-based approach recognised the desirability of promoting synergistic relationships between centres of different functional composition and role at the sub-regional level. In this way, centres of alternative functional emphasis emerge and are complemented by centres having a different functional emphasis. (e.g. Alternative primary function may include Retail, Commercial, Tourist/Entertainment, Medical, Education/Research etc).

- **The Role of Retail in determining Centre Function and Role**: A network-based approach recognised retail as one, rather than the primary or only determinant of the centre order and function.

10.4.2 Planning Scheme Preparation Methodology

The methodology employed in the preparation of the Moreton Bay Regional Planning Scheme (MBRCPS) has purposefully sought to:

- adopt a regional interpretation of the SEQ Place Model (SPM);
- secure policy alignment with the SEQ Regional Plan 2009 – 2031 (SEQRP); and
- achieve compliance with the mandatory planning scheme format, content and drafting requirements of the Queensland Planning Provisions (QPP).

The Desired Regional Outcomes (DROs) of the SEQ Regional Plan have been interpreted and applied at a strategic level in respect of individual place types under the SEQ Place Model. The DROs have therefore provided a categorisation typology used to draft specific outcomes for each place type under the Strategic Framework.

10.4.3 Alignment of SEQ Regional Plan, Place Model and QPP Zoning Structure

Unquestionably, the plan preparation methodology employed in MBRC (which is briefly outlined in section 10.4.2) has many inherent benefits in terms of vertically aligning Council's strategic planning policy with the key outcomes of the SEQ Regional Plan. Notwithstanding this, there are some intrinsic limitations associated with effectively translating the place based model into the more rigid zoning and code based structure mandated by the Queensland Planning Provisions (QPP).

The Activity Centre concept advocated and advanced at the SEQ Regional Plan level, can be seen to readily encompass two SEQ "place types" namely the "Activity Centre Place Type" and the "Enterprise and Employment Place Type". For instance, the concept of the "Specialist Activity Centre" under SEQRP primarily identified regionally significant activity centres that had a non-retail/commercial focus, but which, notwithstanding, were key focal points of employment, investment or social significance to the community (e.g. major educational institutions etc).

The QPP mandates a more traditional zoning structure which requires land to be zoned to reflect its current or intended predominant use. The Centre Zones, which form part of the standard suite of zones namely:

- Principal Centre;
- Major Centre;
- District Centre;
- Local Centre; and
- Neighbourhood Centre

cater principally for activity centres with a primary retail and/or commercial focus, and encourage a functional hierarchy of those centres rather than emphasising a network approach, which was more evident under the SEQRP. Recognising this framework the scope of the Retail and Commercial Sector Needs Study has necessarily sought to inform the future need for retail and commercial services in terms of a recommended hierarchy of Activity Centres.

Recommendations in section 10.6, further address how Activity Centres with a primary non-retail/commercial focus could be best accommodated through the QPP implementation framework. These non-retail/commercial activity centres may include some areas recognised as Enterprise or Employment Place types under the SEQ Place Model.

10.5 Planning Scheme Components

10.5.1 Introduction

The following section outlines a QPP compliant approach for the implementation of the key recommendations of the Retail and Commercial Sector Needs Assessment under the Draft Moreton Bay Regional Planning Scheme.

10.5.2 Strategic Framework

The QPP Version 3 (p. 14) notes as follows with respect to the Strategic Framework:

> "The Strategic Framework:
>
> - sets the policy position for the whole of the planning scheme area;
> - identifies the future development intent for the planning scheme area;
> - implements the regional plan (where relevant);
> - is used in the assessment of impact assessable development;
> - is used where the development does not comply with the applicable code(s).
>
> The State's interests are identified up front in the strategic framework and are expressed at the regional level through a regional plan and through state planning policies."

The requirements of the QPP mandate the following section structure:

- strategic intent;
- theme;
- strategic outcomes;
- elements;
- specific outcomes;
- land use strategies.

Acknowledging the mandatory QPP requirements applicable to the Strategic Framework, the following matters are noted (with particular reference to Activity Centres):

- The Strategic Intent at section 3.2 of the draft strategic framework is QPP compliant but could benefit from being integrated with The Vision at section 3.1.2 of the draft strategic framework;

- The Themes at section 3.1.3 of the draft strategic framework correlate with the Desired Environmental Outcomes of the SEQ Regional Plan, and are therefore QPP compliant.
- Strategic Outcomes and Elements in sections 3.4 – 3.12 of the draft strategic framework are QPP compliant.
- Specific Outcomes in sections 3.14.2 – 3.14.14 of the draft strategic framework are QPP compliant.
- The Strategic Framework does not presently include Land Use Strategies. Land Use Strategies are a mandatory component of the Strategic Framework.
- In respect of Activity Centres, it is recommended that land use strategies articulated under the Strategic Framework could address items such as:
  - Reinforcing the recommended Activity Centres Hierarchy and ensuring that the role, use, composition and intensity of development within individual centres accords with the applicable hierarchy level;
  - Ensuring centres remain permeable and legible in order to maximise connectivity between key centre elements;
  - Maximising non-motorised access to the centre (pedestrian and bicycle links);
  - Providing direction on the preferred location, density and form of in-centre residential uses;
  - Availability and accessibility to public transport;
  - Use continuity and activity etc;
- It is recommended that Urban Structure Plans presently outlined in Part 2 of the MBRC Strategic Framework are referenced but not retained in the Strategic Framework. Alternatively it is recommended that they are integrated into the draft planning scheme as standalone Local Plans complying with Part 7 of the QPP.

10.5.3 Definitions

Use and Administrative definitions are required to comply with the mandatory suite of definitions outlined under Schedule 1 of the QPP.

It is recommended that Council utilise the scope provided under Schedule 1 of the QPP to cluster land use definitions into activity group clusters. Adopting the "Business activities" definitions cluster for example provides a means to minimise the unnecessary regulatory burden by ensuring that inconsequential changes in compatible commercial and retail uses occur without the need for subsequent development (MCU) approval. This is discussed further in section 10.5.4.

10.5.4 Tables of Assessment

Tables of Assessment are required to comply with mandatory requirements Part 5 of the QPP.

It is recommended that the assignment of assessment categories and use based thresholds within Activity Centres has due regard to maximising the "substitutability" or "interchangeability" of compatible commercial and retail uses via the exempt development or self-assessment categories of the planning scheme. Subject to necessarily obvious variations related to centre order and function, uses which are readily interchangeable within centre precincts with minimal or no need for a subsequent MCU application could include:

- Car Park;
- Food and Drink Outlet;
- Garden Centre;
- Health Care Services;
- Office;
- Outdoor Sales;
- Sales Office;
- Service Industry;
- Shop;
- Showroom; and
- Veterinary Services.

10.5.5 Zones and Precincts

Part 6 of the QPP (p. 35) provides that Zones are:

> "........ the primary organising layer of the planning scheme and all land within the planning scheme area must be included within a zone, with the exception of roads and Waterways".

The QPP includes a "standard suite of zones", and stipulates that only zones from the standard suite of zones can be used in the planning scheme.

The effective implementation of the recommended Activity Centres hierarchy is therefore predicated on utilising the Level 2 Centre Zones of the QPP which includes the following zones:

- Principal Centre Zone;
- Major Centre Zone;
- District Centre Zone;
- Local Centre Zone; and
- Neighbourhood Centre Zone.

Table 10.2 provides a comparison current and future centres classification taking into account:

- Existing MBRC Planning Schemes;
- SEQ Regional Plan (SEQRP);
- Queensland Planning Provisions (QPP); and
- Recommendations of the MBRC Retail and Commercial Sector Needs Study.

It is recommended that the Activity Centres Hierarchy derived under MBRC Retail and Commercial Sector Needs Study is adopted in the preparation of the MBRC SPA planning scheme. This includes the reclassification of specified centres (as highlighted in Table 10.2 of the scheme).

Section 6.3 of QPP allows **Precincts** to be used within Zones to provide further refinement for specific areas within the Zone. We contend that the use of precincts may provide MBRC with a viable means of conveying "place based" variations in the preferred nature, character and intensity of development across centres zoned at one level of the hierarchy, but for which subtle variations in character are warranted. Precinct controls could be used for example to convey difference in the assessment status for individual uses, or variations to development standards between in a rural local centre and a coastal local centre.

Section 10.4 canvassed the potential difficulties arising from the application of the QPP in achieving alignment between the SEQ Regional Plan and SEQ Place Model. This relates to a subtle but significant difference in the approach to planning for activity centres. The SEQ Regional Plan advocated a network of activity centres where not all centres had a primary retail /commercial focus. Conversely however, the QPP mandates a more traditional zoning structure which requires land to be zoned to reflect its current or intended predominant use. The Centre Zones, which form part of the standard suite of zones namely:

- Principal Centre;
- Major Centre;
- District Centre;
- Local Centre; and
- Neighbourhood Centre

cater principally for activity centres with a primary retail and/or commercial focus, and encourage a functional <u>hierarchy</u> of those centres rather than emphasising a network approach. In the context of the SEQRP certain activity centres were recognised as "specialist centres". These traditionally did not have a predominate retail/commercial focus, but nonetheless comprised significant focal concentrations of employment and/or investment and were key trip generators. Certain locations in MBRC some of which are encapsulated in the "Enterprise and Employment Place Type", may warrant recognition as activity centres, albeit not retail and commercial activity centres (the key focus of this study). Having regard to the available mechanisms under the QPP, it is recommended that further consideration is given to the use of "**Innovation Zone**" or the "**Specialised Centre Zone**" as a means of adequately recognising these centres, and more effectively regulating development within them.

As noted in section 10.5.2, it is recommended that Structure Plans presently forming part of the Strategic Framework are included as standalone Local Area Plans. In this respect we recommend against incorporating structure plans into zone codes (an approach employed is some SPA Planning Schemes), as this adds unnecessary complexity to zone codes and diminishes the transparency and clarity of the underlying planning intent for the Zone concerned.

10.5.6 Local Plans

It is recommended that Urban Structure Plans presently outlined in Part 2 of the MBRC Strategic Framework are referenced but not retained in the Strategic Framework. Alternatively it is recommended that these are integrated into the draft planning scheme as standalone **Local Plans** complying with Part 7 of the QPP.

10.5.7 Overlays

Overlays have no direct relevance or beneficial application to centres planning other than regulating non centre-related constraints that may indirectly influence the nature or intensity of development within centres (e.g. building height within a centre precinct may be curtails by airport related obstacle considerations).

Part 8 of the QPP provides the scope to use overlays to identify areas of opportunity as well as constraints. Most notably the standard suite of overlays provides the opportunity for an Overlay to identify Transit Orientated Development (TOD) opportunities.

The use of such an overlay is **not recommended** for the purpose of identifying in-centre TOD opportunities, but rather it is suggested that such opportunities are conveyed under the Local Plans foreshadowed in section 10.5.6.

10.6 Planning and Implementation Recommendations

This section has sought to recommend a range of actions designed to effectively implement the key economic recommendations of the Retail and Commercial Sector Needs Study, in a manner that achieves compliance with the mandatory format, content and structural requirements of the Queensland Planning provisions.

Key statutory planning implementation recommendations may be summarised as follows:

10.6.1 Strategic Framework

The Strategic Framework is amended to:

- incorporate the mandatory inclusion of Land Use Strategies for Centre Precincts;
- remove the Urban Structure Plans presently outlined in Part 2 of the MBRC Strategic Framework and integrate them into the draft planning scheme as standalone **Local Plans** complying with Part 7 of the QPP. When recast as Local Plans they should be referenced in the Strategic Framework.

10.6.2 Definitions

It is recommended that Council utilise the scope provided under schedule 1 of the QPP to cluster land use definitions into activity group clusters, and in particular utilise the "Business activities" definitions cluster to reduce unnecessary regulatory burden in centres by ensuring that inconsequential changes in compatible commercial and retail uses can occur without the need for subsequent development (MCU) approval (i.e. using the exempt or self assessable provisions when changing from one business activity to another).

10.6.3 Tables of Assessment

It is recommended that the assignment of assessment categories and use based thresholds within Activity Centres has due regard to maximising the "substitutability" or "interchangeability" of compatible commercial and retail uses via the exempt development or self assessment categories of the planning scheme.

10.6.4 Zones and Precincts

It is recommended that the revised QPP compliant activity centres hierarchy recommended under Section 5.2 is adopted. This includes the reclassification of specified centres.

It is recommended that "Precincts" are used under individual zones to convey localised or "place based" variations in land use intent in terms of the preferred nature, character and intensity of development across centres zoned at one level of the hierarchy, where subtle variations in character are warranted. Precinct controls could be used to convey difference in the assessment status for individual uses, or variations to development standards between for example a rural local centre and a coastal local centre.

In the circumstance that Council elects to broaden its activity centres network to include activity centres that do not have a dominant retail/commercial focus, utilise the Innovation Zone and/or Specialised Centre Zones under the QPP to give practical effect to this outcome.

10.6.5 Local Plans

It is recommended that Urban Structure Plans presently outlined in Part 2 of the MBRC Strategic Framework are referenced but not retained in the Strategic Framework. Alternatively it is recommended that are integrated into the draft planning scheme as standalone **Local Plans** complying with Part 7 of the QPP.

10.6.6 Overlays

The use of an Overlay to identify Transit Orientated Development opportunities is not recommended. Rather it is suggested that such opportunities are conveyed under the foreshadowed Local Plans (being the recast Structure Plans).

10.6.7 Codes

It is recommended that a degree of discipline is applied in the typology used to identify the primary elements addressed under different code types (i.e. Zone, Overlay, Development, Local Area Plan). With respect to the codification of requirements applicable to centres, it is recommended that centre zones codes focus on those matters unique to zones, and that a **Centre Design Code** is prepared to address design issues uniformly applicable to all centres. This approach is recommended as a means of avoiding unnecessary duplication, and improving the clarity and efficiency of the planning scheme as a regulatory instrument.

10.6.8 Recommendations for Existing Centres

Table 10.1 below summarises the recommendations for existing centres.

Table 10.1: Recommendations for existing centres

Centre	Catchment	Centre Type		Additional Retail		Additional Commercial		Comments and Recommendations
		Current	Proposed	2021	2031	2021	2031	
Caboolture Morayfield PRAC	Caboolture - Morayfield	Principal Regional	Principal	-33,816	-84,204	-11,692	-21,785	The Caboolture Morayfield Principal Centre will remain the principal employment centre within Moreton Bay Regional Council and has the highest level of retail, commercial and community facility provision. By 2031, there is anticipated to be demand for additional 84,204m^2 of retail and 21,785m^2 of commercial office floor space. There were no vacant allotments identified within the principal centre and as such it may be appropriate to expand the principal centre zone. There is significant potential for redevelopment within the Caboolture Morayfield principal centre including redevelopment of the existing shopping centres and houses within the centre designation. Some remnant housing within the centre zone serves as home businesses.
North Lakes MRAC	Griffin - Mango Hill	Major Regional	Principal	-64,577	-102,923	-13,177	-28,150	Currently North Lakes is categorised as a major activity centre, but as the population of North Lakes expands retail, commercial and community facility floor space are anticipated to increase substantially. Therefore, North Lakes should also be considered a principal activity centre. By 2031, there is projected to be demand for an additional 102,923m^2 of retail floor space and 28,105m^2 of commercial floor space within the North Lakes major activity centre.
Redcliffe - Kippa Ring MRAC	Redcliffe	Major Regional	Major	2,253	-6,647	-3,060	-6,037	Redcliffe - Kippa Ring will continue to function as a major centre. There is estimated to be demand for an additional 6,647m^2 of retail floor space and 6,037m^2 of commercial floor space to 2031. Incremental centre redevelopment and expansion should be sufficient to cater for additional floor space demand.
Strathpine MRAC	Strathpine	Major Regional	Major	-13,044	-26,694	-6,702	-10,904	It is anticipated that Strathpine will continue to function as a major centre. There's projected to be demand for an additional 26,694m^2 of retail floor space and 10,904m^2 of commercial office floor space by 2031. There were 4.5 hectares of vacant land identified within the Strathpine major activity centre. As such there may be sufficient vacant land within the centre to accommodate future floor space demand.
Arana Hills District Centre	Hills District / Samford	District	District	-4,220	-5,723	-299	-508	Arana Hills is anticipated to continue to function as a district centre with incremental additional floor space provision to 2031. By 2031, there is estimated to be demand for an additional 5,723m^2 of retail floor space and 508m^2 of commercial office floor space. Future floor space provision may be accommodated through centre expansion and redevelopment. There were no vacant allotments identified within the designated centre zone, although there was housing.

Centre	Catchment	Centre Type		Additional Retail		Additional Commercial		Comments and Recommendations
		Current	Proposed	2021	2031	2021	2031	
Albany Creek District Centre	Albany Creek	District	District	-7,942	-11,006	-939	-1,772	Albany Creek is anticipated to continue to function as a district centre with incremental additional floor space provision to 2031. By 2031, there is estimated to be demand for an additional 11,006m^2 of retail floor space and 1,772m^2 of commercial office floor space. There were no vacant allotments identified within the designated centre zone, as such additional floor space provision would be accommodated through redevelopment of existing centres and / or expanding the centre zone.
Warner Village	Central Pine West	District	District	-10,733	-14,699	-1,935	-4,072	Warner Village is anticipated to function as a district centre as the population of the Central Pine West catchment grows and there is additional demand for retail and commercial floor space, and community facilities. By 2031, there is anticipated to be demand for an additional 14,699m^2 of retail floor space and 4,072m^2 of commercial office floor space. There were underutilised allotments identified within the Warner Village catchment that would potentially be able to accommodate future retail and commercial floor space demand. Given the additional floor space demand within the Central Pine West Catchment, the catchment and particularly Warner Village should be the subject of detailed planning.
Kallangur District Centre	Dakabin-Kallangur-Murrumba Downs	District	District	-3,416	-5,332	-1,128	-1,496	Kallangur district centre will continue to function as a district centre with incremental increases in floor space provision. By 2031, there is projected to be demand for an additional 5,332m^2 of retail floor space and 1,496m^2 of commercial office floor space. There is limited capacity for centre expansion within the Kallangur district centre and as such it may be appropriate to expand the centre zone. The centre zone is currently a linear strip of approximately 1.15km along Anzac Avenue, Kallangur. It may be appropriate that any expansion to the centre zone be to the depth of the centre rather than the length. Alternatively, the old Tulip Town site could be considered for additional floor space provision.
Deception Bay Shopping Centre	Rothwell - Deception Bay	District	District	4,593	1,557	-1,059	-1,360	The Deception Bay Shopping Centre is likely to continue to function as a district centre. There estimated to be sufficient provision of retail floor space within Deception Bay Shopping Centre zone.
Burpengary District Centre	Burpengary - Narangba	District	District	404	-7,787	-1,658	-5,557	The Burpengary district centre is likely to continue to function as a district centre. By 2031, there is anticipated to be demand for an additional 7,787m^2 of retail floor space and 5,557m^2 of commercial office floor space within the Burpengary district centre. There were two vacant allotments identified within the Burpengary district centre and as such there is potential for the expansion of existing centre and / or new centres.

Centre	Catchment	Centre Type		Additional Retail		Additional Commercial		Comments and Recommendations
		Current	Proposed	2021	2031	2021	2031	
Bellara District Centre	Bribie Island	District	District	-436	-1,249	-637	-857	The Bellara district centre will continue to function as a district centre. By 2031, there is anticipated to be demand for an additional 1,249m^2 of retail floor space and 857m^2 of commercial office floor space within the Bribie Island district centre. Additional floor space could be supplied through the incremental expansion of centre floor space.
Margate Village District Centre	Redcliffe	District	District	1,250	-373	-983	-1,939	The Margate Village district Centre is envisaged to continue to function as a district centre focussed around Margate Village Shopping Centre. By 2031, there is anticipated to be demand for an additional 373m^2 of retail floor space and 1,939m^2 of commercial office floor space. Additional floor space demand may be accommodated through redevelopment and / or expansion of existing centres.
Lawnton Employment Area	Lawnton - Bray Park	Employment Area	Specialised Centre	11,235	4,950	-312	-580	The Lawnton Employment Area will function as a specialised centre (bulky goods/special purpose). It is estimated that there is sufficient provision of retail floor space within the centre with demand for an additional 580m^2 of commercial office floor space by 2031.
Petrie Village District Centre	Petrie / Dayboro	District	District	-5,598	-6,693	-168	-261	Petrie Village does not currently function as a district centre. The catchment is projected to record high demand for additional retail within the catchment. With the expansion of Petrie Village the centre could function as a district centre. There were no vacant allotments identified within the centre zone. Therefore, it may be appropriate to expand the centre zone.
Woolworths Market Place, Albany Creek	Albany Creek	Local	Local	-1,196	-1,842	-11	-21	Woolworths Market Place is anchored by a Woolworth supermarket (3,498m2) and will function as a local centre. There is estimated to be demand for an additional 1,842m2 of retail and 21m2 of commercial floor space by 2031.
Albany Place	Albany Creek	Local	N'hood	-663	-1,022	-232	-437	
Dawn Road Local Centre	Albany Creek	Local	N'hood	-388	-598	-	-	
Radius Medical Centre	Albany Creek	Local	N'hood	-76	-118	-167	-315	
Narangba Valley Shopping Centre	Burpengary - Narangba	Local	N'hood	47	-899	-87	-291	
Narangba Village	Burpengary - Narangba	Local	N'hood	23	-442	-163	-545	
FoodWorks Burpengary	Burpengary - Narangba	Local	N'hood	16	-310	-	-	
Chooks Corner	Burpengary - Narangba	Local	N'hood	13	-252	-	-	
Woodpecker Tavern	Burpengary - Narangba	Local	N'hood	12	-228	-	-	

Centre	Catchment	Centre Type		Additional Retail		Additional Commercial		Comments and Recommendations
		Current	Proposed	2021	2031	2021	2031	
Narangba Station Plaza	Burpengary - Narangba	Local	N'hood	4	-75	-182	-609	
Oakey Flat Road	Burpengary - Narangba	Local	N'hood	1	-25	-	-	
Wamuran	Caboolture Midwest	Local	Local	-5,784	-7,524	-476	-1,014	There is anticipated to be demand for an additional 7,524m^2 of retail floor space and 1,014m^2 of commercial office floor space within Wamuran. Given the significant demand for additional retail floor space Wamuran should be viewed as a local centre.
Elimbah	Caboolture Midwest	Local	Local	-2,700	-3,512	-	-	A number of vacant tenancies were identified within Elimbah. There is projected to be demand for an additional 3,512m^2 of retail floor space within the centre. As such, there may be scope for expansion for the centre so that is functions as a local centre.
Excelsior Park Village	Caboolture Midwest	Local	Local	-2,320	-3,019	-	-	There is projected to be demand for an additional 3,019m^2 of retail floor space within Excelsior Park Village. There may be scope for expansion on the centre so that is functions as a local centre.
Lilly Brook Shopping Village	Dakabin-Kallangur-Murrumba Downs	Local	Local	-1,100	-1,717	-69	-91	Lilly Brook Shopping Centre is anchored by a Coles supermarket and is anticipated to function as a local centre. There is anticipated to by demand for an additional 1,717m^2 of retail floor space and limited commercial office floor space to 2031.
Murrumba Downs Shopping Centre	Dakabin-Kallangur-Murrumba Downs	Local	Local	-821	-1,281	-193	-256	Murrumba Downs Shopping Centre is anchored by Coles supermarket. There is demand for an additional 1,281m^2 of retail and 256m^2 of commercial office floor space. The centre will function as a local centre.
Castle Hill Centre	Dakabin-Kallangur-Murrumba Downs	Local	N'hood	-396	-618	-43	-57	
Anzac Avenue Local Centre	Dakabin-Kallangur-Murrumba Downs	Local	N'hood	-245	-383	-	-	
Dakabin Village	Dakabin-Kallangur-Murrumba Downs	Local	N'hood	-133	-207	-	-	
Kallangur Village Shopping Centre	Dakabin-Kallangur-Murrumba Downs	Local	N'hood	-57	-89	-	-	
Samford Village Main Street Retailing	Hills District / Samford	Local	Local	-1,133	-1,537	-261	-445	Samford Village aims to cater for the day to day needs of a rural catchment. As such the centre will function as a local centre. There is demand for an additional 1,537m^2 of retail floor space and 445m^2 of commercial office floor space to 2031.
Ferny Way South	Hills District / Samford	Local	N'hood	-574	-779	-157	-268	

Centre	Catchment	Centre Type		Additional Retail		Additional Commercial		Comments and Recommendations
		Current	Proposed	2021	2031	2021	2031	
Everton Hills Shopping Centre	Hills District / Samford	Local	Local	-3,102	-4,207	-215	-365	Everton Hills Shopping Centre currently (2012) functions as a neighbourhood centre with a 714m^2 IGA. There is demand for new centres within the Hills District / Samford catchment. However, it is recommended to expand the existing Everton Hills Shopping Centre to a local centre.
Samford Valley	Hills District / Samford	Local	N'hood	-474	-643	-26	-45	
Samford Central	Hills District / Samford	Local	N'hood	-444	-602	-39	-67	
Everton Shopping Village	Hills District / Samford	Local	N'hood	-280	-380	-30	-51	
Fernlands Village	Hills District / Samford	Local	Local	-2,830	-3,839	-227	-386	The centre currently (2012) functions as a neighbourhood centre. However, there is demand for additional centres within the catchment and as such there may be scope for the centre to transition to a supermarket anchored local centre with demand for 3,839m^2 of retail floor space and 386m^2 of commercial floor space by 2031.
Samford Country Centre	Hills District / Samford	Local	N'hood	-178	-241	-21	-36	
Chinook Street Local Centre	Hills District / Samford	Local	N'hood	-159	-215	-	-	
170 Patricks Road	Hills District / Samford	Local	N'hood	-135	-183	-36	-61	
Arlington Court	Hills District / Samford	Local	N'hood	-121	-164	-	-	
Ferny Way Local Centre	Hills District / Samford	Local	N'hood	-105	-142	-	-	
Mt Glorious	Hills District / Samford	Local	N'hood	-54	-73	-12	-20	
Dayboro	Petrie / Dayboro	Local	District	-7,571	-9,052	-447	-693	Dayboro caters for the day to day needs of a geographically large rural catchment. Based on the additional floor space demand within the catchment, Dayboro could function as a district centre.
Beeville Road Local Centre	Petrie / Dayboro	Local	N'hood	-1,174	-1,403	-18	-28	
Central Lakes Shopping Village	Caboolture - Morayfield	Local	Local	-1,572	-2,400	-1,071	-1,996	Central Lakes Shopping Village is anchored by a Woolworths supermarket and is anticipated to function as a local centre. There is projected to be demand for an additional 2,400m^2 of retail and 1,996m^2 of commercial office floor space.
Lear Jet Centre	Caboolture - Morayfield	Local	N'hood	-856	-1,307	-276	-515	
The Hub Convenience Centre	Caboolture - Morayfield	Local	N'hood	-757	-1,155	-2,159	-4,023	
Trader Dukes Centre	Caboolture - Morayfield	Local	N'hood	-663	-1,012	-	-	
Glenwood Drive Centre	Caboolture - Morayfield	Local	N'hood	-414	-632	-	-	

Centre	Catchment	Centre Type		Additional Retail		Additional Commercial		Comments and Recommendations
		Current	Proposed	2021	2031	2021	2031	
Parkridge Shopping Village	Caboolture - Morayfield	Local	N'hood	-348	-531	-190	-354	
Bellmere Shopping Centre	Caboolture - Morayfield	Local	N'hood	-291	-445	-	-	
Hillcrest Gardens Shopping Centre	Caboolture - Morayfield	Local	N'hood	-187	-286	-200	-373	
The Big Fish Tavern	Caboolture - Morayfield	Local	Local	-161	-246	-	-	The Big Fish Tavern is the site for the Sungate Business Park which will have an estimated 50,000m^2 of floor space including retail, commercial and industrial and will be anchored by Woolworths.
Argyll Street Centre	Caboolture - Morayfield	Local	N'hood	-95	-145	-	-	
Tullawong Corner Store	Caboolture - Morayfield	Local	N'hood	-51	-79	-	-	
Lincoln Centre	Strathpine	Local	N'hood	-1,305	-1,535	-1,257	-2,045	
Sandalwood Shopping Village	Strathpine	Local	N'hood	-82	-96	-207	-337	
Bell's Corner	Strathpine	Local	N'hood	-680	-800	-770	-1,253	
Eatons Hill Hotel and Function Centre	Strathpine	Local	N'hood	-1,603	-1,885	-	-	
Astley Parade Local Centre	Griffin - Mango Hill	Local	Local	-5,464	-7,912	-4,059	-8,672	Astley Parade Local Centre is anchored by an IGA supermarket (2,506m^2) and is likely to function as a local centre. There is demand for an additional 7,912m^2 of retail floor space and 8,672m^2 of commercial office floor space by 2031.
North Lakes Convenience Centre	Griffin - Mango Hill	Local	Local	-1,722	-2,494	-333	-711	Northlakes Convenience Centre currently functions as a neighbourhood centre. By 2031 there is projected to be demand for an additional 2,494m^2 of retail floor space and 711m^2 of commercial office floor space. There may be scope to expand the centre so that it will function as a local supermarket anchored centre.
Bunya Park Drive Convenience Centre	Central Pine West	Local	Local	-2,380	-3,260	-851	-1,791	The centre currently (2012) functions as a neighbourhood centre. There may be scope for the centre to transition to a supermarket anchored local centre with demand for 3,260m^2 of retail floor space and 1,791m^2 of commercial floor space by 2031.
Eatons Hill Convenience Centre	Central Pine West	Local	N'hood	-1,256	-1,720	-355	-747	
Redcliffe IGA	Redcliffe	Local	N'hood	337	-101	-328	-648	
Landsborough Avenue Local Centre	Redcliffe	Local	N'hood	334	-100	-456	-899	
Clontarf Bayside Plaza	Redcliffe	Local	N'hood	155	-46	-184	-364	
Redcliffe Coastal Strip Retail	Redcliffe	Local	N'hood	126	-37	-33	-65	
Midways Convenience Centre	Redcliffe	Local	N'hood	99	-29	-18	-35	
Mariners Plaza	Redcliffe	Local	N'hood	84	-25	-21	-41	

Centre	Catchment	Centre Type		Additional Retail		Additional Commercial		Comments and Recommendations
		Current	Proposed	2021	2031	2021	2031	
Ashmole Shopping Village	Redcliffe	Local	N'hood	69	-20	-17	-34	
Victoria Avenue Local Centre	Redcliffe	Local	N'hood	53	-16	-	-	
Kensington Village Shopping Centre	Lawnton - Bray Park	Local	Local	1,153	629	-110	-204	The centre is anchored by Coles (3,040m^2) and functions as a local centre.
Ebert Place Shops	Lawnton - Bray Park	Local	N'hood	390	213	-7	-13	
Francis Road Local Centre	Lawnton - Bray Park	Local	N'hood	141	77	-	-	
Sparkes Road Local Centre	Lawnton - Bray Park	Local	N'hood	33	18	-91	-170	
Ellis Street Local Centre	Lawnton - Bray Park	Local	N'hood	107	58	-	-	
Bunnings Rothwell & Harvey Norman Centre	Rothwell - Deception Bay	Local	Specialised Centre	3,509	1,190	-	-	The Bunnings Rothwell & Harvey Norman Centre has a strong focus on bulky goods and functions as a specialised centre.
Zone Rothwell	Rothwell - Deception Bay	Local	Specialised Centre	2,101	712	-68	-88	The Zone Rothwell Centre has a strong focus on bulky goods and functions as a specialised centre.
Deception Bay Strip Retail	Rothwell - Deception Bay	Local	N'hood	2,055	697	-781	-1,004	
Deception Bay IGA	Rothwell - Deception Bay	Local	N'hood	464	157	-	-	
Rothwell Local Centre	Rothwell - Deception Bay	Local	N'hood	320	108	-199	-255	
North Rise	Rothwell - Deception Bay	Local	N'hood	250	85	-88	-114	
Bay Markets	Rothwell - Deception Bay	Local	N'hood	155	52	-97	-125	
Burpengary Tavern	Rothwell - Deception Bay	Local	N'hood	151	51	-	-	
North Bay Shopping Centre	Rothwell - Deception Bay	Local	N'hood	147	50	-	-	
Bayview Shops	Rothwell - Deception Bay	Local	N'hood	66	22	-35	-45	
Redcliffe Leagues Club	Rothwell - Deception Bay	Local	Local	-	-	-	-	Redcliffe Leagues Club includes the Dolphins Health Precinct and is the site for the Dolphins Central Shopping Centre.
Banksia Beach Shopping Village	Bribie Island	Local	Local	-119	-340	-90	-121	The centre is anchored by an IGA supermarket (2,766m^2) and functions as a local centre.
Bongaree	Bribie Island	Local	N'hood	-103	-294	-90	-122	
Welsby Parade Shops	Bribie Island	Local	N'hood	-97	-279	-128	-173	
Woorim	Bribie Island	Local	N'hood	-95	-272	-150	-201	
Aldi Centre - Bribie Island	Bribie Island	Local	N'hood	-58	-166	-6	-8	
Coolgarra Shops	Bribie Island	Local	N'hood	-43	-123	-	-	
Bribie Island Hotel	Bribie Island	Local	N'hood	-25	-71	-	-	

Centre	Catchment	Centre Type		Additional Retail		Additional Commercial		Comments and Recommendations
		Current	Proposed	2021	2031	2021	2031	
Marine Parade	Bribie Island	Local	N'hood	-11	-31	-	-	
Currong Shops	Bribie Island	Local	N'hood	-16	-46	-	-	
Cotterill Shops	Bribie Island	Local	N'hood	-7	-19	-	-	
Bellara Corner Store	Bribie Island	Local	N'hood	-3	-10	-	-	
Elkhorn Avenue	Bribie Island	Local	N'hood	-3	-9	-	-	
The Village Sandstone Point	Caboolture East	Local	N'hood	-1,113	-1,323	-70	-85	
Beachmere Plaza	Caboolture East	Local	N'hood	-1,002	-1,191	-61	-74	
Ningi	Caboolture East	Local	N'hood	-512	-609	-53	-65	
Toorbul	Caboolture East	Local	N'hood	-229	-273	-	-	
Donnybrook	Caboolture East	Local	N'hood	-89	-106	-16	-20	
Woodford Shopping Centre	Caboolture Hinterland	Local	Local	-223	-1,771	-	-	Woodford Shopping Centre is anchored by Woolworths ($3{,}668m^2$) and functions as a local centre. There might be scope to expand the centre with an additional $1{,}771m^2$ of retail floor space demand by 2031.
Woodford Strip Retail	Caboolture Hinterland	Local	N'hood	-206	-1,633	-414	-864	
Woodford Central Shopping Centre	Caboolture Hinterland	Local	N'hood	-88	-698	-	-	
D'Aguilar	Caboolture Hinterland	Local	N'hood	-50	-398	-	-	

Note: Neighbourhood centre (n'hood)
Note: a negative balance indicates an undersupply of floor space

10.7 Recommendations for Moderate and High Need Catchments

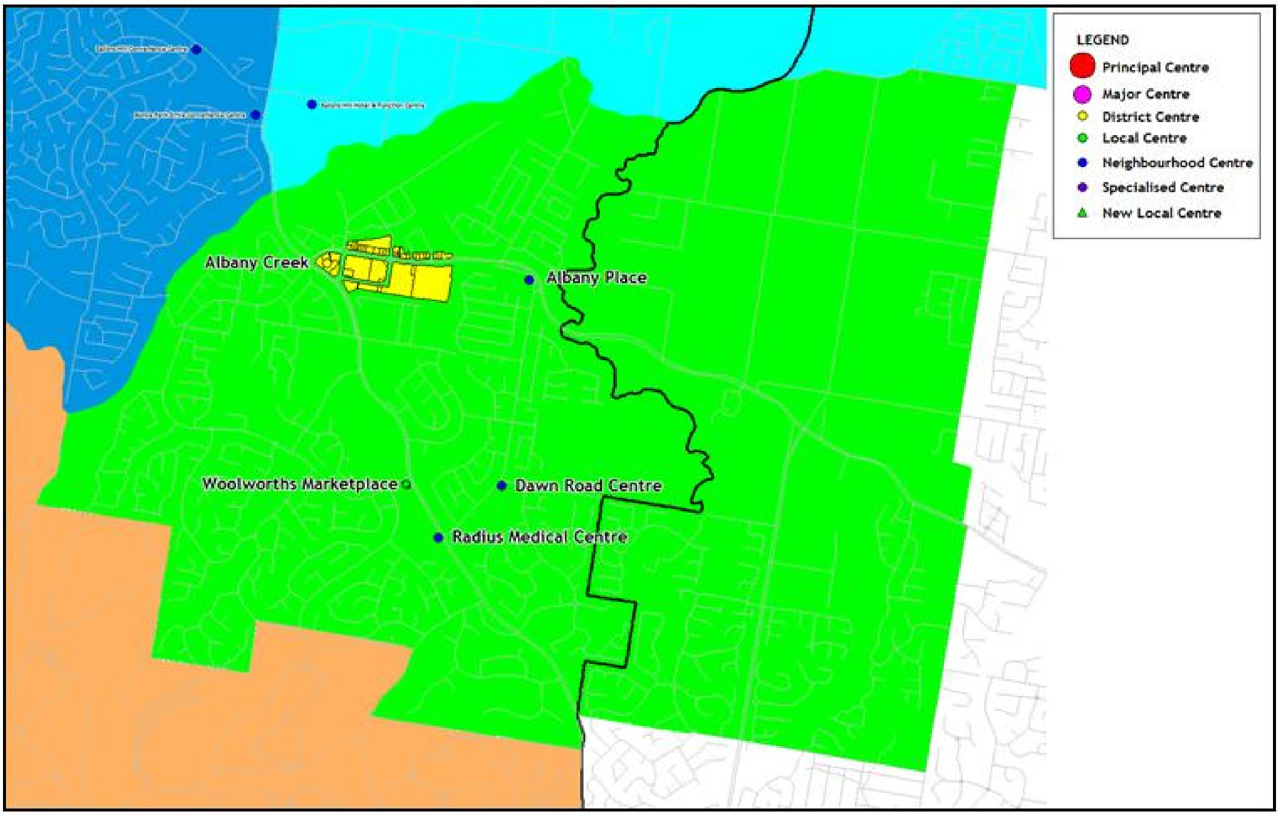
Section 9 of this report made allowances for the allocation of future floor space demand to new centres in moderate and high need catchments. This section of the report makes recommendations regarding the potential location of new centres within moderate and high need catchments. Recommendations pertain only to new Local Centres. It is recommended that the location of neighbourhood centres be left to market forces. This is because neighbourhood centres serve localised catchments and have limited impacts on infrastructure and the centres network more broadly.

10.7.1 Albany Creek

Need for additional floor space in the Albany Creek catchment is projected to increase from 13,631m^2 by 2021 to 21,661m^2, including need for 5,2361m^2 of new centres by 2021 increasing to 8,303m^2 in 2031 (Refer to Table 9.7), or one additional Local Centre by 2021.

In investigating the potential location of new centres, Moreton Bay Regional Council should consider locations that are highly accessible (e.g. along or adjacent to Old North Road and Albany Creek Road). Alternatively, Albany Place could be expanded to function as a local centre.

Figure 10.1: Albany Creek Catchment Centres



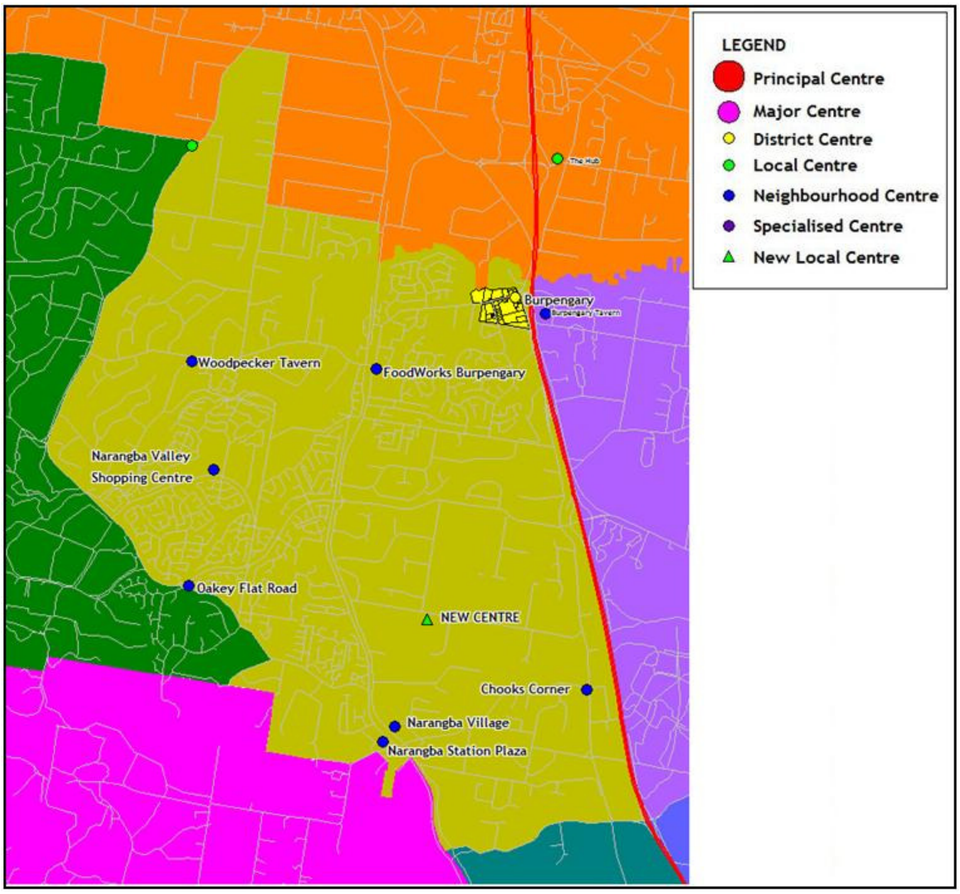
10.7.2 Burpengary – Narangba

There is need for 2,118m^2 of floor space including 549m^2 of new floor space by 2021. By 2031, there is anticipated to be need for an additional 26,701m^2 of floor space including 9,680m^2 of new centre floor space, or one new Local Centre by 2031.

Figure 10.2 below shows the centres within the Burpengary – Narangba catchment including the provision of new centres. Within the Narangba East Strategy, there is a recommendation for a new 'Local Centre' on Callaghan Road. The location of the recommended new centre fills a gap in the existing centres network. The new 'Local Centre' is described in the Narangba East Local Development Area Plan (LDAP) as having 1,000m^2 of mixed commercial and retail floor space, which under the proposed centres hierarchy in this report (Section 5.4) is classified as a Neighbourhood Centre. The new 'Local Centre' as defined in the Narangba East LDAP would meet the need for new centre floor space to 2021. It is recommended that the new centre should transition to a Local Centre (as defined in Section 5.4) to meet the need for new centre floor space by 2031 (9,680m^2).

The Narangba East LDAP also identifies a District Centre at the Narangba Rail Station with a total floor space of 17,000m^2 split evenly between retail and commercial uses. Based on the preceding analysis there is probably not sufficient need to warrant a District Centre until well after 2021.

Figure 10.2: Burpengary – Narangba Catchment Centres



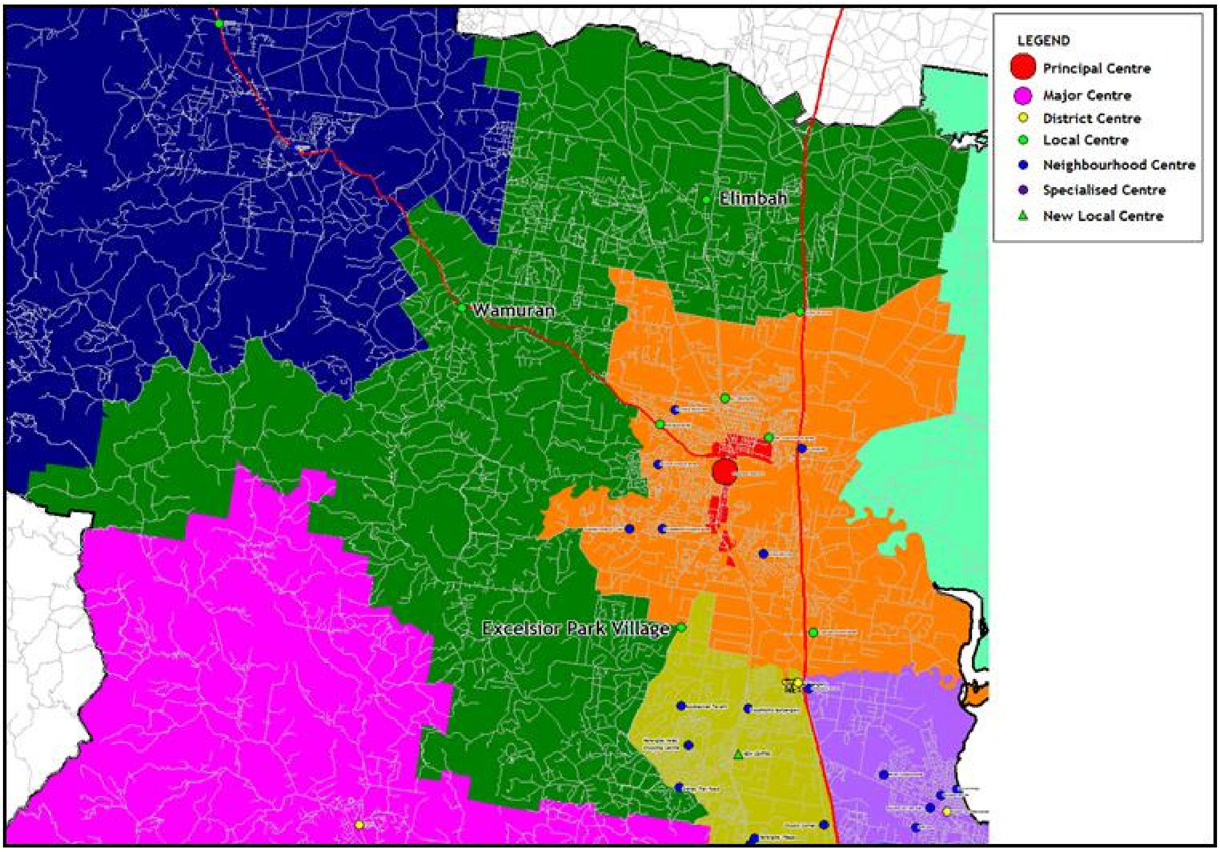
Note: Location of new centres are based on the Narangba East Local Development Area Plan and are indicative only.

10.7.3 Caboolture Midwest

The Caboolture Midwest catchment covers a geographically large area with moderate need for additional floor space. There is need for an additional 18,686m^2 of floor space by 2021 including 7,407m^2 of new centre floor space, or need for a new Local Centre. By 2031, there is estimated to be need for 24,874m^2 of total floor space including 9,805m^2 of new centre floor space, or one – two new Local Centres (Refer to Table 9.9).

It is recommended that the existing centres of Wamuran, Elimbah and Excelsior Park Village become Local Centres that provide a rural service centre function. Hence, these centres may provide some higher order facilities in recognition of this service centre function. These three centres currently function as neighbourhood centres. The Caboolture Midwest catchment includes the Caboolture West Master Plan Area. This report does not consider the implications of developing the Caboolture West Master Plan Area. Recommendations pertaining to the Caboolture West Master Plan Area are provided in the Caboolture West Master Planned Area: Centres Hierarchy Options report.

Figure 10.3: Caboolture Midwest Catchment Centres



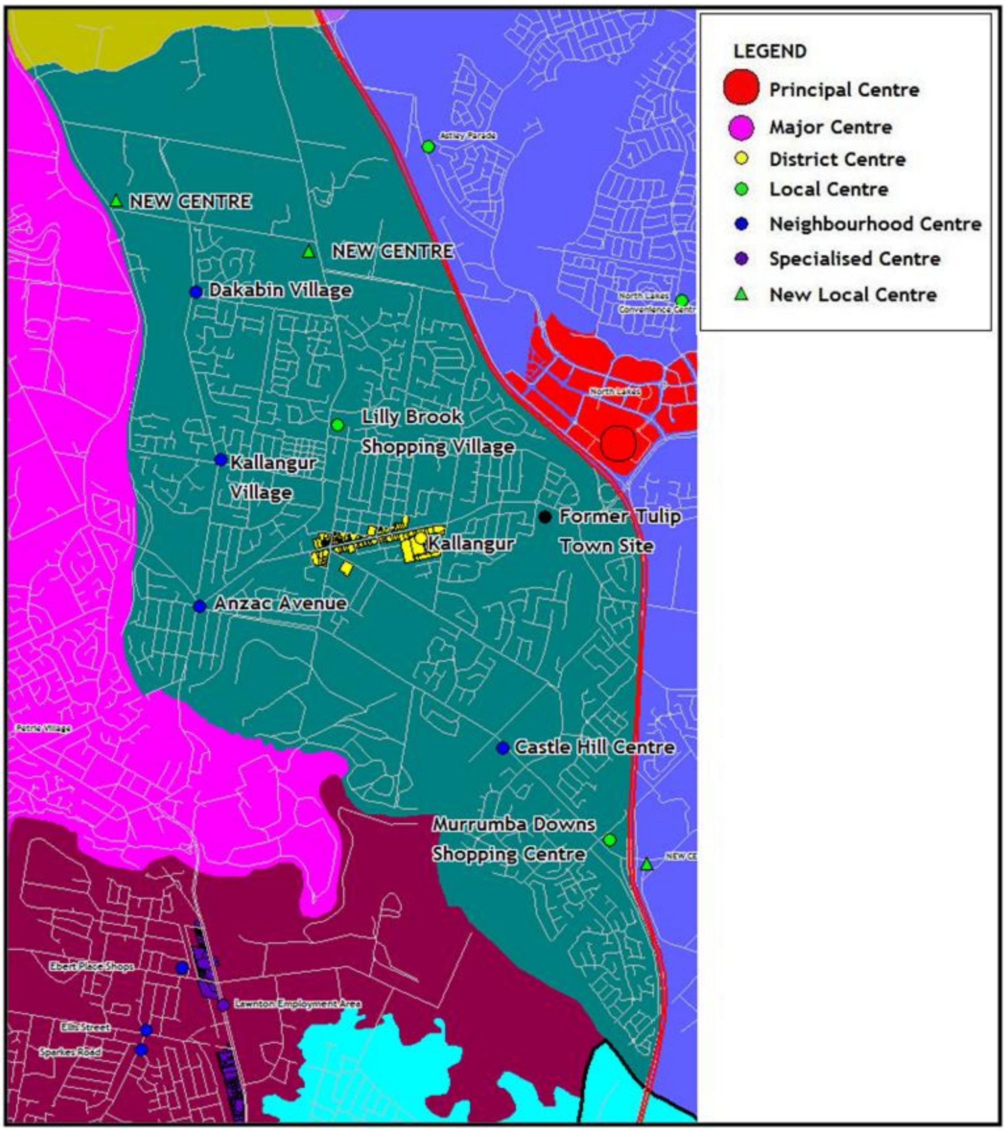
10.7.4 Dakabin – Kallangur – Murrumba Downs

Figure 10.4 below shows the centres within the Dakabin – Kallangur – Murrumba Downs catchment. There is need for an additional 12,667m^2 of total floor space in the catchment by 2021 increasing to 19,212m^2 by 2031(Refer to Table 9.10). Need is estimated at 5,067m^2 of new centre floor space by 2021 increasing to 7,685m^2 by 2031, or need for one additional Local Centre.

The Dakabin Local Area Plan (LAP) recommends locations for new centres on Alma Road. The new centre identified to the northern side of Alma Road at its western end has a maximum floor area of 500m^2. The centre is anticipated to include a small convenience store (250m^2) and approximately 250m^2 of other specialty tenancies. The second centre identified in the Dakabin LAP located on the south-western corner of the Old Gympie Road and Alma Road intersection has a maximum floor area of 1,000m^2. The centre is anticipated to include a small convenience store (450m^2) and specialty tenancies (550m^2). Under the proposed centres hierarchy (Section 5.4) the centres would be classified as Neighbourhood Centres.

Based on the needs assessment, these two new centres are recommended to remain at a Neighbourhood Centre level until after 2021.

Figure 10.4: Dakabin – Kallangur – Murrumba Downs Catchment Centres



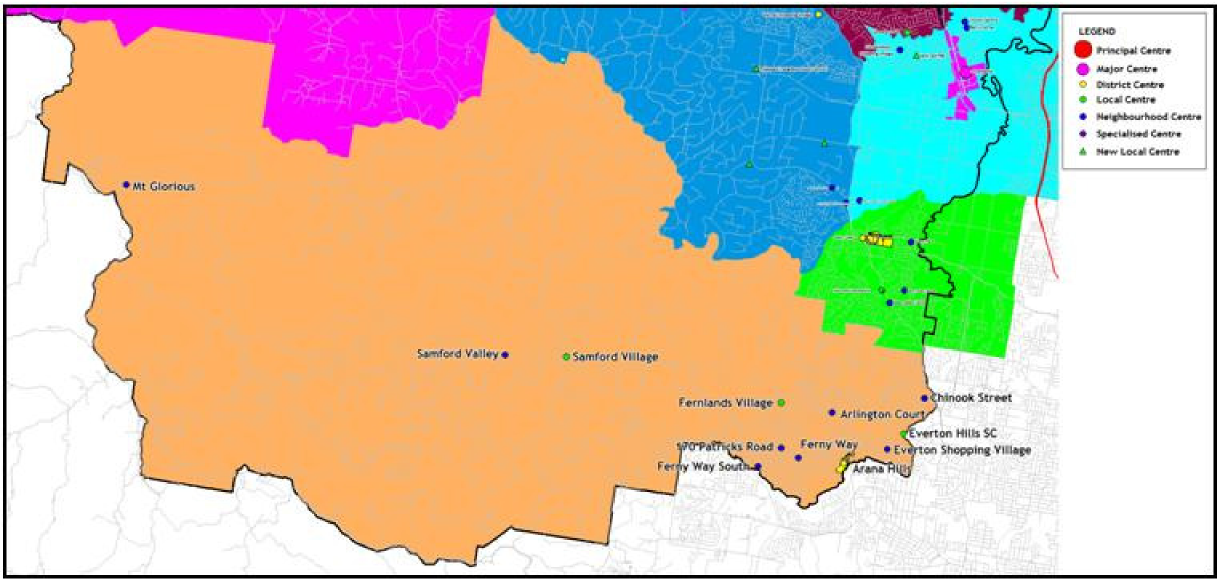
Note: Location of new centres are based on the Narangba East Local Development Area Plan and are indicative only.

10.7.5 Hills District / Samford

The Hills District / Samford catchment covers a geographically large area and is projected to have moderate need for additional floor space to 2031. Need is estimated at an additional 15,615m^2 of total floor space and 6,110m^2 of new centre floor space by 2021, increasing to 21,647m^2 of total floor space and 8,428m^2 of new centre floor space by 2031 (Refer to Table 9.11).

The key recommendation for this catchment is that the Everton Hills Shopping Centre and Fernlands Village centres (currently Neighbourhood Centres) transition to function as Local Centres. Fernlands Village is located on Woodhill Road, Ferny Hills and Everton Hills Shopping Centre is located on the corner of Queens and South Pine Roads, Everton Hills.

Figure 10.5: Hills District / Samford Catchment Centres

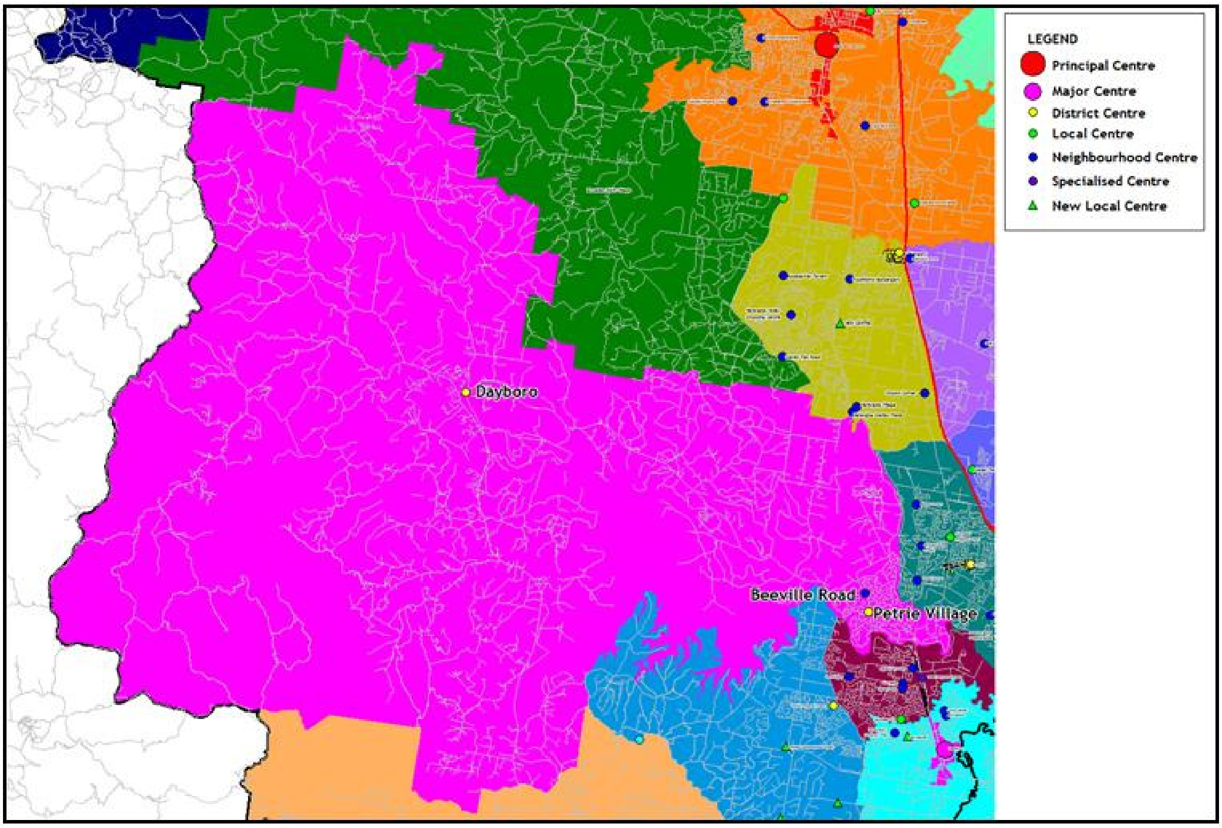


10.7.6 Petrie / Dayboro

Figure 10.6 below shows the centres within the Petrie / Dayboro catchment. Petrie Village currently does not function as a district centre. However, there is anticipated to be moderate need for additional floor space within the catchment, 14,975m^2 of total floor space in 2021 including 5,927m^2 of new centre floor space (Refer to Table 9.12). With expansion of Petrie Village it is anticipated to function as a District Centre. Petrie has long been expected to operate as a District Centre but has failed to do so. Its ability to fulfil this role in the future may ultimately rely on significant redevelopment of the centre.

Dayboro caters for the day to day needs of a geographically large rural catchment. Based on the needs analysis for the catchment, Dayboro could function as a District Centre.

Figure 10.6: Petrie / Dayboro Catchment Centres

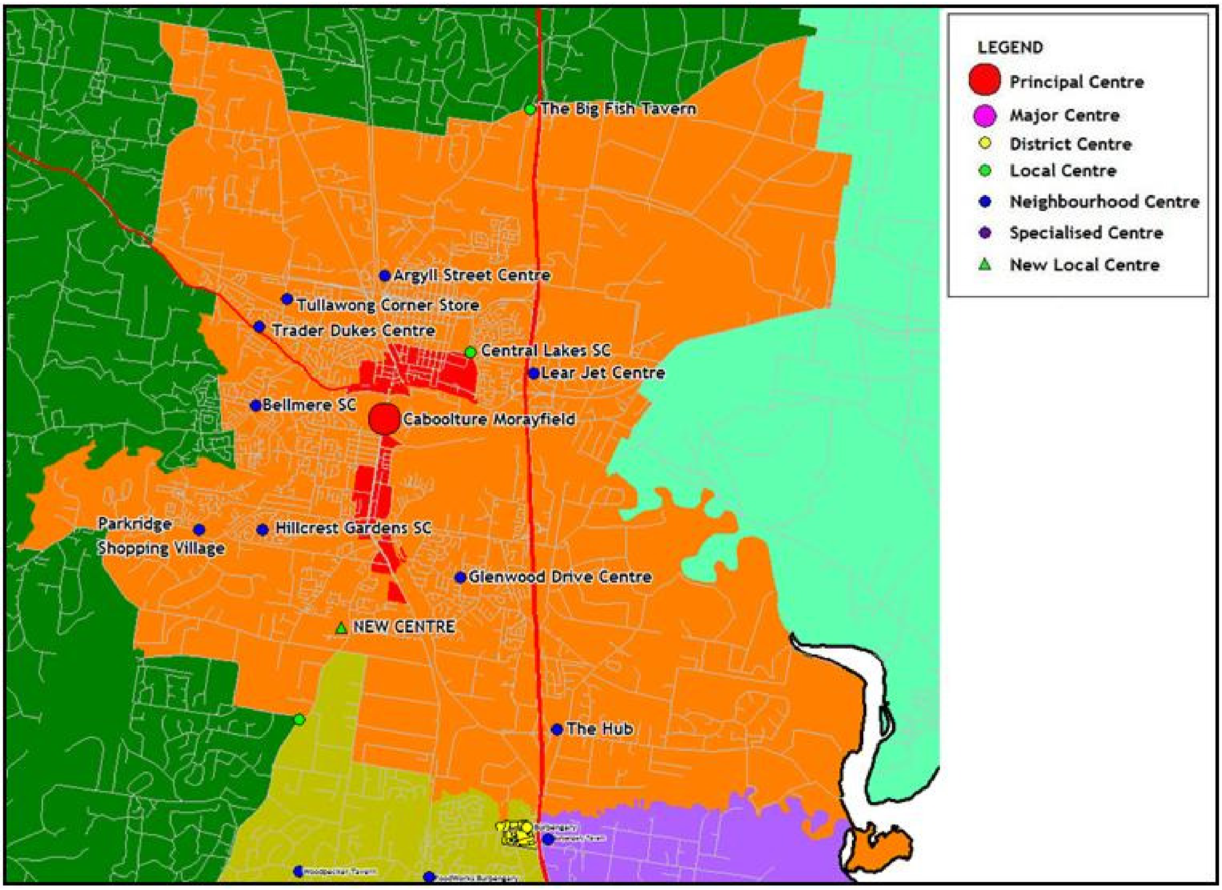


10.7.7 Caboolture – Morayfield

Within the Caboolture – Morayfield catchment, there is anticipated to be need for an additional 66,791m^2 of total floor space including 11,990m^2 of new centres floor space by 2021, or one to two new Local Centres. By 2031, there is estimated to be need for an additional 141,105m^2 of total floor space including 19,618m^2 of new centres floor space, or two to three new Local Centres (Refer to Table 9.13). It is recommended that a new Local Centre be located on Oakey Flat Road. Oakey Flat Road has high exposure and the site was identified in the Moreton Bay Regional Council Draft Strategic Framework.

The Caboolture – Morayfield catchment can be expected to host a number of new Neighbourhood Centres as residential areas are taken up and rural residential areas infill.

Figure 10.7: Caboolture – Morayfield Catchment Centres



Note: Location of new centres are based on the Moreton Bay Regional Council Draft Strategic Framework and are indicative only.

10.7.8 Griffin – Mango Hill

Within the Griffin – Mango Hill catchment there is projected to be high need for additional floor space of approximately 104,505m^2 by 2021, including 15,172m^2 of new centre floor space, or two to three Local Centres. By 2031, there is estimated to be demand for 175,853m^2 of total floor space and 24,991m^2 of new centre floor space, or three to four new Local Centres (see Table 9.14).

Figure 10.8 below shows the recommended new centre locations for the Griffin – Mango Hill catchment. New centres within the Griffin – Mango Hill catchment follow the Griffin Location Area Plan (LAP) and the Mango Hill Local Area Plan (LAP).

In the Mango Hill LAP there are four local centres identified, namely:

- Mango Hill Village Centre: located in the vicinity of the intersection of Kinsellas Road West, Lamington Street and Chelmsford Road. The centre is to have a gross leasable area of 700m^2 with no individual tenancy larger than 500m^2;
- Halpine Drive Centre: located on the eastern side of Halpine Drive and south of the Mango Hill Ring Road. The centre is to have a combined maximum of 2,500m^2 gross leasable area with a maximum individual tenancy size of 1,000m^2;

- Kinsella Heights Centre: located around the intersection of the Mango Hill Ring Road. The centre will have a combined maximum gross leasable area of 3,000m^2 of retail uses with a maximum individual tenancy size of 1,000m^2; and
- Convenience Centre – Southern Centre: located near the North – South Urban Arterial Road. The centre is intended to contain convenience uses and a 24-hour service station. The centre will have a combined maximum of 600m^2 gross leasable area with a maximum individual tenancy size of 300m^2.

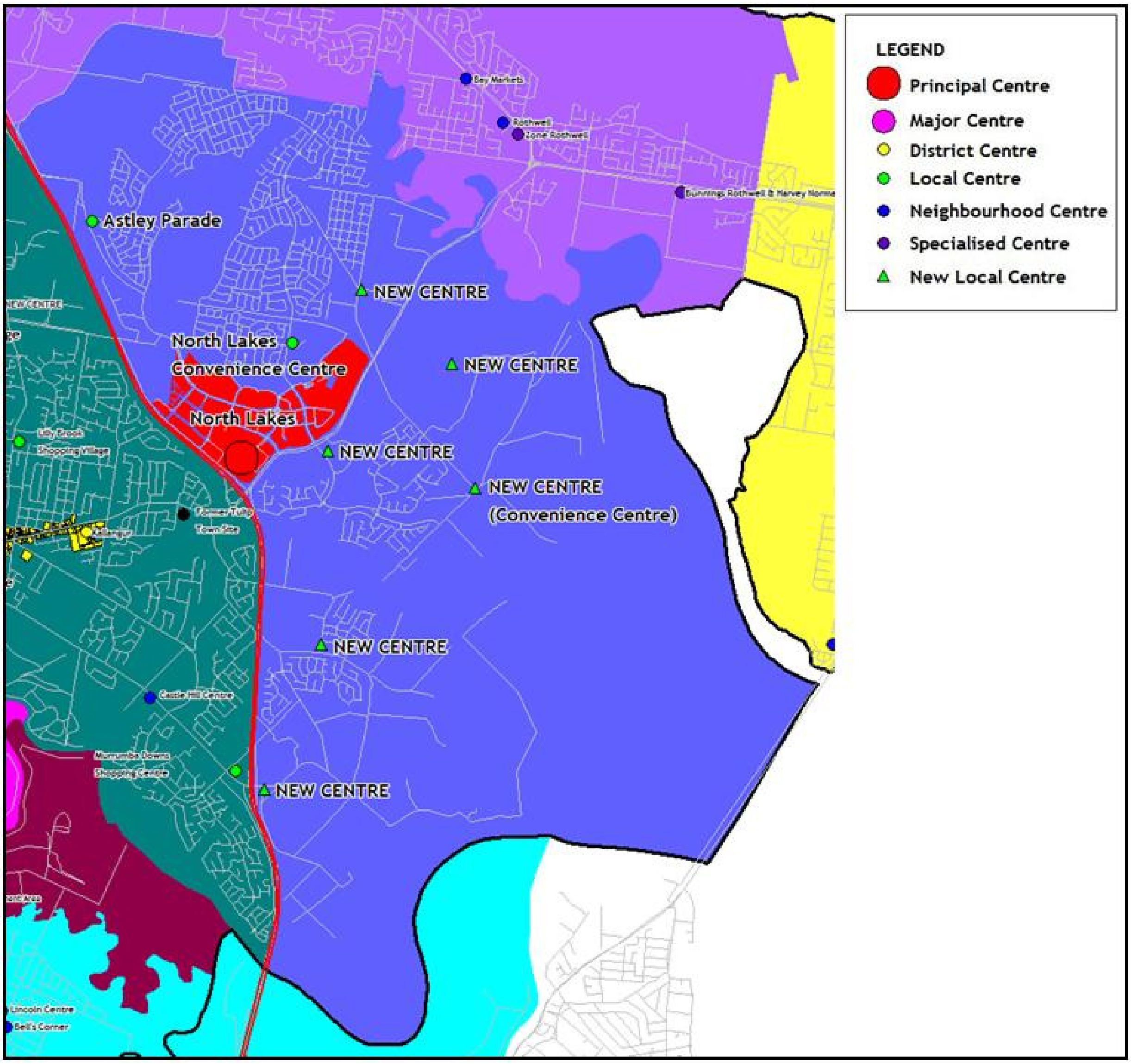
In the Griffin LAP there are two local centres identified, namely:

- LA-1: located to the north of Brays Road in close proximity to the North – South Urban Arterial Road. Maximum gross floor area of 1,800m^2 including a small convenience store of approximately 500m^2 and specialty retail of 1,300m^2; and
- LA-2: located to the northern side of Dohles Rocks Road, close to the Bruce Highway. Maximum gross floor area of 1,800m^2 including a small convenience store of approximately 500m^2 and specialty retail of 1,300m^2.

Each of the local centres identified in the Mango Hill and Griffin LAPs are considered Neighbourhood Centres under the proposed centres hierarchy (Section 5.4). It is recommended that some of these Neighbourhood Centres transition to Local Centres by 2021, including:

- Halpine Drive Centre located on the eastern side of Halpine Drive and south of the Mango Hill Ring Road;
- Kinsella Heights Centre located around the intersection of the Mango Hill Ring Road; and
- LA-1 located to the north of Brays Road in close proximity to the North – South Urban Arterial Road.

Figure 10.8: Recommended location of new centres, Griffin – Mango Hill catchment



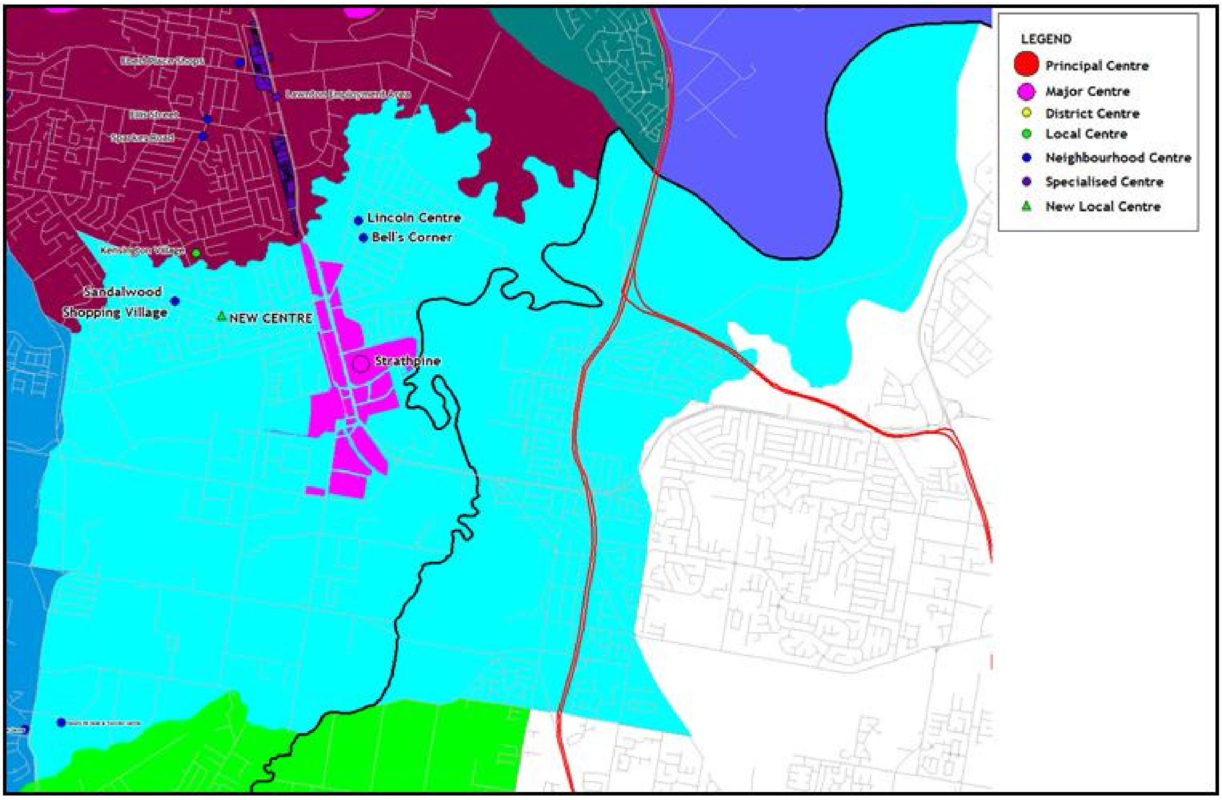
Note: Locations of new centres are based on the Griffin LAP and the Mango Hill LAP and are indicative only.

10.7.9 Strathpine

Figure 10.9 below shows the recommended location for the addition of a local centre within the Strathpine catchment. Need is estimated at an additional 33,390m² of total floor space including 7,739m² of new centres floor space by 2021, or one new Local Centre (Refer to Table 9.15). By 2031, there is anticipated to be need for 55,655m² of total floor space and 10,107m² of new centre floor space, or one to two new Local Centres.

The recommended site for the location of a new centre is in the vicinity of the intersection of Samsonvale Road and Livingstone Street, Strathpine, to the west of Gympie Road. Samsonvale Road provides an overpass for the railway line and a signalised intersection on Gympie Road. The site was identified in the Moreton Bay Regional Council Draft Strategic Framework.

Figure 10.9: Recommended location of new centres, Strathpine catchment



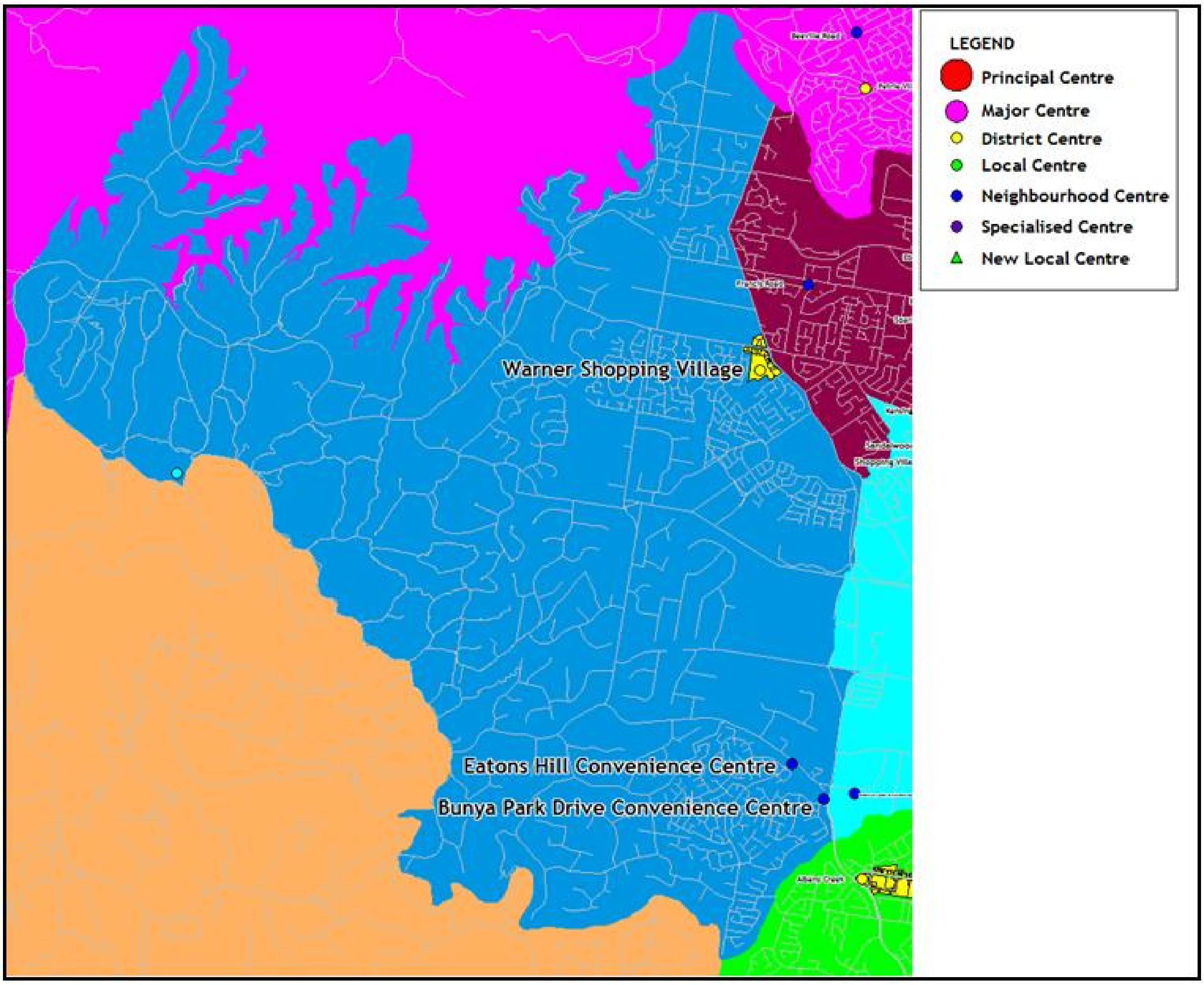
Note: Locations of new centres are based of the Moreton Bay Regional Council Draft Strategic Framework and are indicative only.

10.7.10 Central Pine West

Within the Central Pine West catchment there is estimated to be need for an additional 39,848m^2 of total floor space including 22,339m^2 of new centre floor space by 2021, or three to four new Local Centres (Refer to Table 9.16).

The Central Pine West catchment is a relatively high growth area (population growth rate of 2.3% per annum) and currently has low provision of retail and commercial floor space (13,149m^2). Because of the significant projected future need and the importance of centre locations in anchoring the urban form, it is recommended that the identification of new centre sites in Central Pine West is the subject of detailed planning.

Figure 10.10: Central Pine West Catchment Centres



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APPENDIX A

LITERATURE REVIEW

MBRC Corporate Plan

The MBRC Corporate Plan 2012-2017 sets out Moreton Bay Regional Council's mission, which is as follows:

> We will serve the community to create a region of opportunity and a vibrant lifestyle, while focussing on excellence and sustainability.

The MBRC Corporate Plan also highlights the five main values of Council, these being:

- Respect;
- Service;
- Integrity;
- Teamwork; and
- Sustainability

Figure A.1 below outlines how Moreton Bay Regional Council upholds its values.

Figure A.1: Values of Moreton Bay Regional Council

Respect	Service	Integrity	Teamwork	Sustainability
starting point	*this is what we do*	*how we do it*	*working together*	*outcome*
▪ We listen to people ▪ We treat people fairly and consistently ▪ We embrace diversity and opinions ▪ We treat others as we wish to be treated	▪ We seek to understand the needs of those we serve ▪ We strive to exceed expectations ▪ We communicate clearly ▪ We take a positive approach ▪ We are proud to serve our community	▪ We are ethical and honest ▪ We take responsibility for our actions ▪ We act within statute and law ▪ We take pride in the manner in which we perform our duties	▪ We promote a friendly, supportive work environment ▪ We inspire and encourage innovation ▪ We develop and maintain relationships ▪ We work collectively to achieve common goals ▪ We work collaboratively with our community and external partners	▪ We focus on the future ▪ We respect the environment ▪ We demonstrate leadership by example

Source: Moreton Bay Regional Council Corporate Plan, 2012-2017

The Corporate Plan identifies service targets within the following areas:

- Business development;
- Tourism;
- Land use and infrastructure planning;
- Community safety;
- Disaster management;
- Community capacity building;
- Community support services;
- Office of the CEO;
- Customer services;
- Legal;
- Development assessment;
- Building and plumbing services;
- Local laws;
- Public health services;
- Environmental initiatives;
- Waste collection, reduction and recycling;
- Roads and transport;
- Stormwater infrastructure;
- Waterways and coastal facilities;;
- Parks;
- Sport and recreation;
- Community facilities;
- Libraries;
- Cultural services;
- Events;
- Infrastructure support;
- Infrastructure delivery;
- Building and facilities;
- Fleet;
- Communications;
- Corporate finance;
- Financial services;
- Human resources;
- Information management;
- Information technology; and
- Property services.

MBRC Community Plan

The Moreton Bay Region Community Plan 2011 - 2021 (p. 3) provides a ten year vision for Moreton Bay Regional Council. The vision statement for the region is as follows:

> "A thriving region of opportunity where our communities enjoy a vibrant lifestyle. Our vision is for:
>
> - A region of opportunity for all;
> - A region with safe, strong and inclusive communities; and
> - A region that celebrates our vibrant lifestyle."

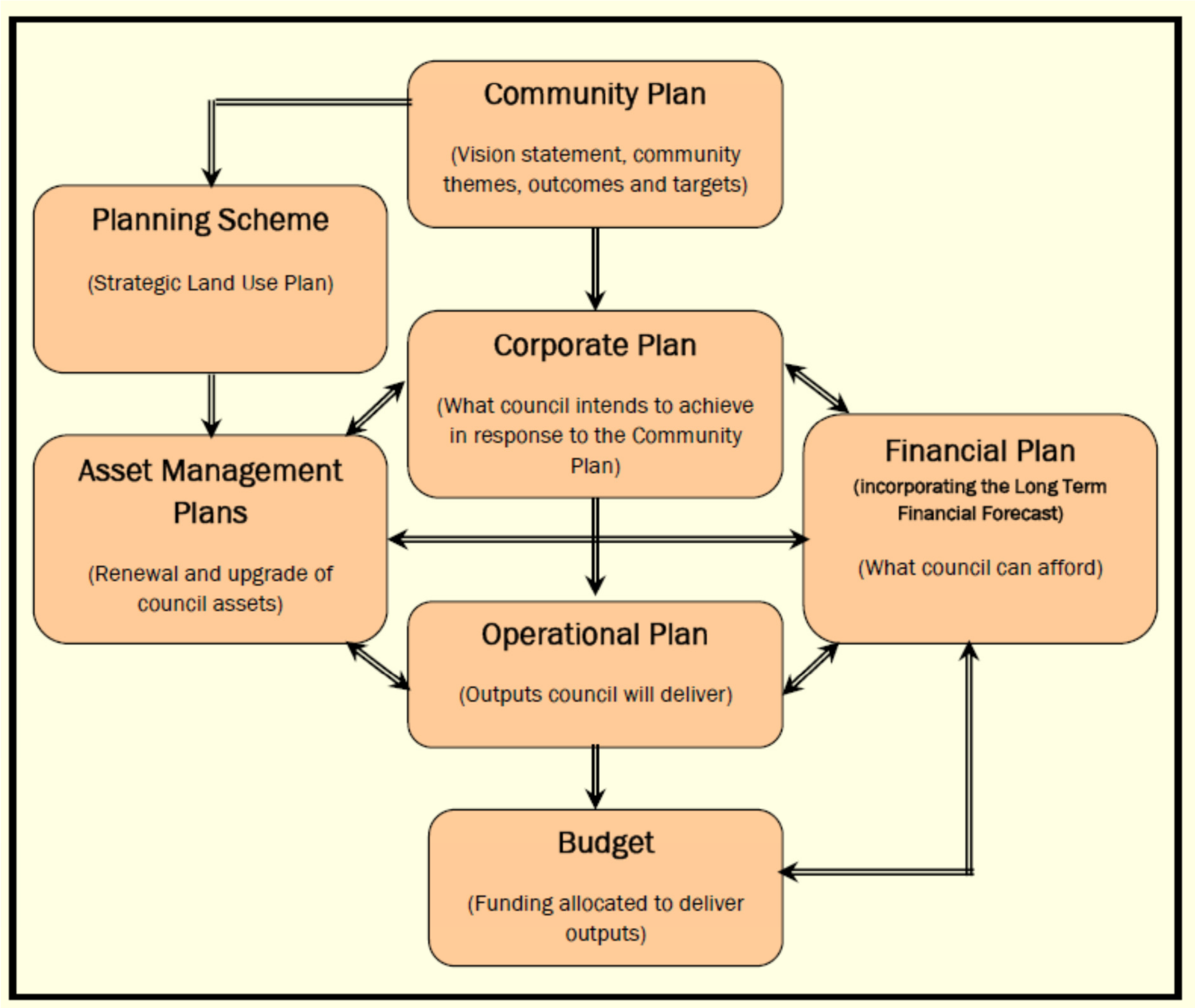
Under the three broad visions, a number of targets have been defined as follows:

A region of opportunity for all	Target 1: Increase the overall value of the regional economy; Target 2: Increase the number of Moreton Bay residents working within the region; Target 3: Three out of four Moreton Bay Region residents will hold trade, training or tertiary qualifications; Target 4: Promote affordable living and diversity of housing choice; Target 5: Improve regional planning and development outcomes; Target 6: Aim for new dwelling targets as stated in the South East Queensland Regional Plan; Target 7: Increase the number of households with a broadband internet connection; Target 8: Increase the online web presence of local businesses; and Target 9: Increase the number of households using broadband internet to transact and engage with Moreton Bay Regional Council.
A region with safe, strong and inclusive communities	Target 10: Reduce the instance of crime in the region per capita; Target 11: Increase public awareness of personal safety; Target 12: Increase the resilience of communities and businesses to a disaster; Target 13: Cut by one third obesity, smoking, heavy drinking and unsafe sun exposure; Target 14: Improve the socio-economic profile of local communities; Target 15: Increase by fifty percent the proportion of residents involved in their communities as volunteers; Target 16: Increase residents' overall satisfaction with Council; Target 17: Ensure the ongoing financial sustainability of Council; and Target 18: Promote a sense of community pride in the region.
A region that celebrates our vibrant lifestyle	Target 19: Improve the condition and extent of high-value vegetation and protect native species; Target 20: Increase the health and resilience of waterways and coastal areas; Target 21: Increase the recovery of resources from waste per capita; Target 22: Cut by one third Moreton Bay Region's carbon footprint per household; Target 23: Increase use of public transport; Target 24: Increase walking and cycling as methods of transport; Target 25: Promote a safe and effective road network in the region; Target 26: Improve the provision and maintenance of accessible and connected networks of open space; Target 27: Sustainable use of open space including parks and sporting fields; Target 28: Increase the number of Moreton Bay residents undertaking physical activity; and Target 29: Increase the number of people participating in events and cultural activity.

For each target, the Community Plan outlines the lead agencies, measure/s available to track progress (including the baseline data sources for each measure), first steps required to meet the target, risks and opportunities associated with each target and reporting progress.

Figure A.2 below highlights how the Community Plan relates to Council's Integrated Corporate Reporting Structure.

FigureA.2: Integrated Corporate Reporting Structure of Moreton Bay Regional Council



Source: Moreton Bay Region Community Plan, 2011-2021

MBRC Economic Development Strategy

The MBRC Economic Development Strategy provides long-term strategic direction for the economic growth and vitality of the Moreton Bay Region.

The MBRC Economic Development Strategy identified five specific growth opportunities for the Moreton Bay Region with high value adding activity, as follows:

Building product manufacturing	• Metal product manufacturing; • Cement, lime, plaster and concrete manufacturing; • Pre-fabricated building manufacturing;
Machinery and equipment manufacturing	• Industrial M&E manufacturing; • Medical device manufacturing; • Professional equipment manufacturing; • Speciality transportation equipment manufacturing; • Solar manufacturing;
Food and beverage manufacturing	• Baked goods; • Processed foods; • Beverages;
Professional services	• Professional services; • Back office/processing centres; • Business customer service centres; • Training centres;
Transport and logistics	• Distribution centres; and • Logistics operations

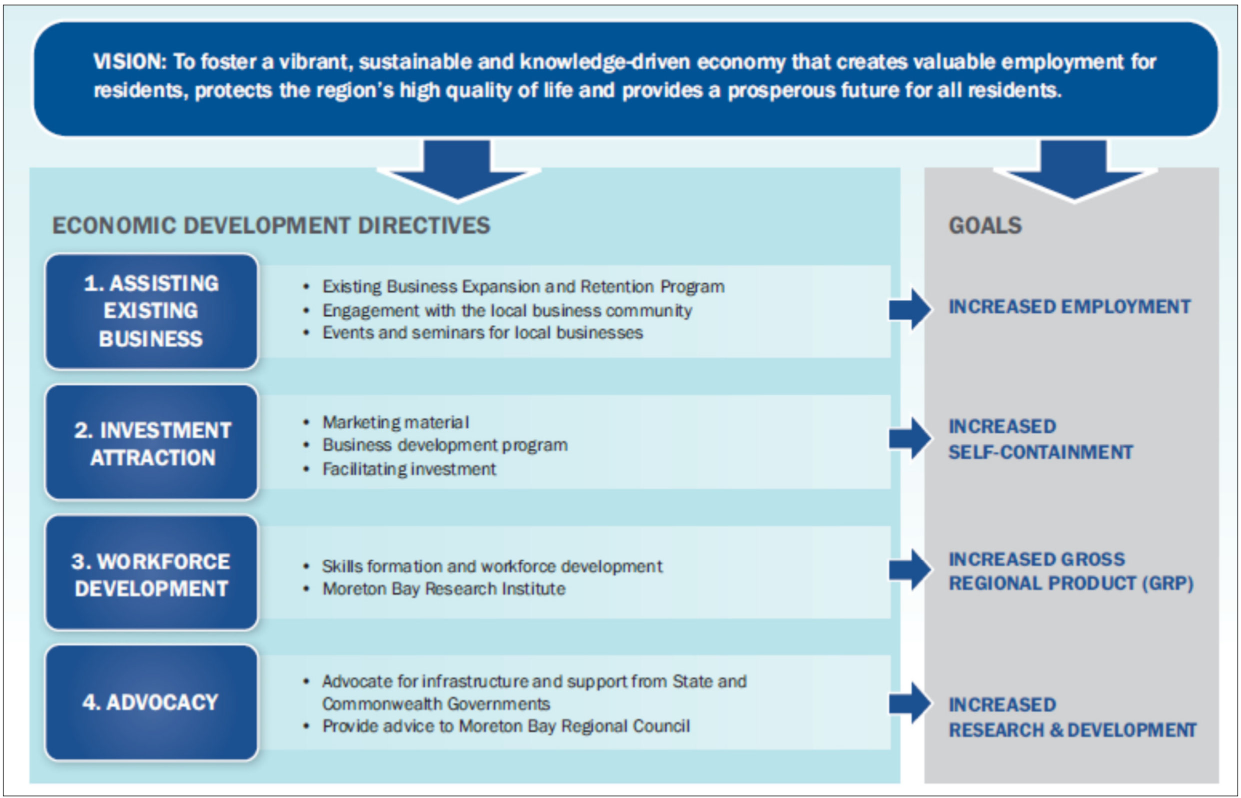
The document highlights the rationale for the identification of these opportunities but does not detail a strategy to specifically target these sectors.

The vision for the Moreton Bay Region, as outlined in the Economic Development Strategy is as follows:

> To foster a vibrant, sustainable and knowledge-driven economy that creates valuable employment for residents, protects the region's high quality of life and provides a prosperous future for all residents.

Figure A.3 below outlines the vision, economic development directives and goals of the Moreton Bay Regional Council Economic Development Strategy.

Figure A.3: Vision, Economic Development Directives and Goals of the MBRC Economic Development Strategy



Source: Moreton Bay Regional Council Economic Development Strategy

State Level Planning Documents

South East Queensland Regional Plan 2009-2031

The South East Queensland Regional Plan (SEQRP) 2009-2031 is the Queensland State Government's statutory document to guide growth and development in South East Queensland until 2031. The SEQ Regional Plan reflects and informs state planning policy and priorities and informs local government plans and policies. The document identifies a spatial framework for South East Queensland that defines a regional land use pattern for medium and long-term growth.

Centre Hierarchy/Network Methodology

The SEQ Regional Plan operates an 'Activity Centres Network'. The network of centres consists of the following elements:

- Primary Activity Centre
- Principal regional activity centres
- Major regional activity centres
- Specialist activity centres

- Principal rural activity centres
- Major rural activity centres

Centre Attributes

The Activities Centres include the following attributes:

- ***Primary Activity Centre*** - The Brisbane central business district (CBD) is the region's primary activity centre. It has a state-wide function; it is the key focus of government administration, retail, commercial, and specialised personal and professional services. It accommodates cultural, entertainment, health and education facilities of a state, national, and international significance.
- ***Principal regional activity centres*** - Serve catchments of regional significance and accommodate key employment concentrations. They provide a secondary administrative focus. They serve as a key focal point for regional employment and in-centre regional development. They have existing dedicated public transport and development densities should be around 40-120 dwellings per hectare.
- **Major regional activity centres** – are centres that complement the principal regional activity centre by serving catchments of sub-regional significance and accommodates key employment concentrations. These centres are located around key suburban public transport stops. Residential development should be 30-80 dwellings per hectare or greater.
- ***Specialist activity centres -*** are centres of regional economic significance. They provide a primary focus for specialised economic activity, employment or education rather than having a retail function.
- ***Principal rural activity centres –*** are important service and community hubs in rural areas. They have excellent road and basic public transport links.
- ***Major rural activity centres -*** are rural towns that provide more than one function to the surrounding rural catchment. They provide concentrated retail, commercial, community and some government services. They have excellent road connections and possibly public transport services.

Relevance to the Moreton Bay Regional Council region

- The SEQRP is a statutory document and the provisions of the SEQRP must be considered in the development of the MBRC Planning Scheme.
- The SEQRP identifies Caboolture, Morayfield, Redcliffe, North Lakes and Strathpine as 'Major Regional Activity Centres'.

Centres Regulation

- The SEQRP regulates centres planning through the 'South East Queensland Regional Plan 2009-2031 State Planning regulatory provisions'. The Regulatory provisions only apply to land outside the "Urban Footprint".

Implications for MBRC Retail & Commercial Sectors Needs Assessment

- The SEQRP is a statutory document and the MBRC Planning Scheme must ensure centres design provisions within the new scheme align with the elements of the SEQRP.
- The SEQRP identifies the following as Major Regional Activity Centres
  - Caboolture,
  - Morayfield,
  - Redcliffe; and
  - North Lakes

Draft Queensland Planning Provisions v3

The Queensland Planning Provisions (QPP) are the standard planning scheme provisions made under the *Sustainable Planning Act 2009* (SPA) that provide a consistent format and structure for local government planning schemes across Queensland. The QPP is to be used to guide local governments in the preparation of their new SPA compliant Planning Scheme(s).

Centre Hierarchy/Network Methodology

- The QPP operates a 'Hierarchy' Centres Methodology. The hierarchy of centres consists of the following elements:
  - Principal Centre
  - Major Centre
  - District Centre
  - Local Centre
  - Neighbourhood Centre

Centre Attributes

- The Activities Centres include the following attributes:
  - ***Principal Centre –*** is to provide for the largest and most diverse mix of uses and activities to form that forms the core of an urban settlement. It includes key concentrations of high-order retail, commercial, administrative, community, cultural, recreational and entertainment activities which are capable of servicing the planning scheme area.
  - ***Major Centre –*** is to provide for a mix of uses and activities. It includes key concentrations of higher order retail, commercial, offices, residential, administrative and health services, community, cultural and entertainment facilities which are capable of servicing a subregion in the planning scheme area.
  - ***District Centre –*** is to provide for a mix of uses and activities. It includes a concentration of land uses including retail, commercial, residential, offices, administrative and health services, community, small-scale entertainment and recreational facilities capable of servicing a district.

- ***Local Centre –*** is to provide for a limited range of land uses and activities to service local needs. It includes local shopping, local employment nodes, commercial, cafes and dining, entertainment, community services and residential development where it can integrate and enhance centre activity but it is not the predominant use.
- ***Neighbourhood Centre –*** is to provide for a small mix of land uses to service residential neighbourhoods. It includes small-scale convenience shopping, professional offices, community services and other uses which directly support the immediate community.

Relevance to the Moreton Bay Regional Council region

- The QPP provides a guide for Local Governments in the preparation of their SPA compliant planning schemes and contains mandatory components which the local government, including MBRC, must use.
- The QPP includes a 'Centre Zones Category' which sets out the types of centre zones which must be incorporated in the MBRC Planning Scheme.
- As part of the Strategic Framework (and in conjunction with QPP) MBRC has identified:
  - Caboolture Morayfield - principal activity centre;
  - Strathpine, Redcliffe/Kippa-Ring and North Lakes - major activity centres, and
  - Arana Hills, Albany Creek, Warner, Petrie, Kallangur, Margate, Deception Bay. Burpengary, and Bellara – district activity centres

Centres Regulation

- Chapter six of the QPP outlines the mandatory components with regard to 'Zones'. 'Zones' are the primary organising layer of the planning scheme and all land within the planning scheme area must be included within a zone. The QPP includes a 'Centre Zones Category' which sets out the types of centre zones which must be included.

Centres Design

The Centres zones category in the QPP sets out design outcomes for centres including:

- Development is established in accessible and well-connected locations;
- Development is designed to incorporate sustainable practices including energy efficiency, water conservation and public/active transport; and,
- Development is reflective of and responsive to environmental constraints.

Implications for MBRC Retail & Commercial Sectors Needs Assessment

- The QPP provides a guide for Local Governments in the preparation of their SPA compliant planning schemes and contains mandatory components which the local government, including MBRC, must use.
- The QPP includes a 'Centre Zones Category' which sets out the types of centre zones which must be incorporated in the MBRC Planning Scheme.
- As part of the Strategic Framework (and in conjunction with QPP provisions) MBRC has identified:

- Principal activity centre
  - Caboolture;
  - Morayfield;
- Major activity centres
  - Strathpine;
  - Redcliffe/Kippa-Ring; and
  - North Lakes;
- District activity centres
  - Arana Hills;
  - Albany Creek;
  - Warner;
  - Petrie;
  - Kallangur;
  - Margate;
  - Deception Bay;
  - Burpengary, and
  - Bellara.

Next Generation Planning - A Handbook for Planners 2011

The Next Generation Planning handbook provides a framework of new ways for planning for the suburbs, towns and cities of South East Queensland. The handbook provides a practical resource for planners, designers and developers to implement the concepts in planning schemes. The Handbook uses 'Place Model' to provide a framework to articulate strategic outcomes for Planning Scheme.

Centre Hierarchy/Network Methodology

- The Next Generation Planning handbook operates a 'Hierarchy' Centres Methodology. The hierarchy of centres consists of the following elements:
  - Centres of Activity
  - CBDs

Centre Attributes

- The Activities Centres include the following attributes:
  - ***Centres of Activity*** – have concentrations of non-residential activities such as shopping, employment, higher education and entertainment. They vary in scale from local to district and regional. They are a focus of transport networks, and a hub for public transport and pedestrian/cycling systems. Housing is contained within the centres of activity,

predominately as apartments. Buildings have little to no setback to the street and the street layout is usually grid-based.

- ***CBDs*** – are the centres of cities and are the largest centres. They have the widest range and greatest intensity of activity within cities. They are laid out in in a grid and are at the centre of transport networks for public transport, cycling and pedestrians. These centres are key focal points for the community, providing employment, business and entertainment and area are important to the economy of the city.

Relevance to the Moreton Bay Regional Council region

- Moreton Bay Regional Council have used the SEQ Place Model within the Next Generation Planning handbook as the base model for the Region's Draft Strategic Framework; and
- MBRC have identified the following centres of activity:
  - Principal activity Principal activity centre
    - Caboolture;
    - Morayfield;
  - Major activity centres
    - Strathpine;
    - Redcliffe/Kippa-Ring; and
    - North Lakes;
  - District activity centres
    - Arana Hills;
    - Albany Creek;
    - Warner;
    - Petrie;
    - Kallangur;
    - Margate;
    - Deception Bay;
    - Burpengary, and
    - Bellara.
- It is noted that the MBRC has only incorporated Activity Centres as part of the Draft Strategic Framework and has not identified CBDs

Centres Design

- Housing is contained within the centres of activity, predominately as apartments.
- Buildings have little to no setback to the street and the street layout is usually grid-based.
- CBDs act as a focal place for the region

- Centres of activity are focal places outside of the CBD and a range of housing types can be found within a 400m catchment of the mixed use core
- Higher order public transport corridors and other movement types directly link the CBD and Centres of Activity

Implications for MBRC Retail & Commercial Sectors Needs Assessment

- The MBRC has used the 'Place Model' to underpin the strategies within the Draft Strategic Framework.
- The Place Model positively reflects the provisions and intentions of the QPP and SEQRP.
- The MBRC Planning Scheme may need to consider the addition of a CBD Activity Centre into the provisions of the planning scheme.

Local Level Planning Documents

The Moreton Bay Regional Council Draft Strategic Framework 2011

The Draft Strategic Framework (SF) is a spatial development plan for the Moreton Bay Regional Council. The SF forms part of the new Moreton Bay Regional Council planning scheme and sets the policy direction for the scheme. The primary purpose of the plan is to set out the strategy for the future settlement pattern and location of economic activity for the region, including the associated infrastructure to provide for development, whilst enhancing and protecting the region's natural resources.

Centre Hierarchy/Network Methodology

- The Draft Strategic Framework operates an 'Activity Centres Network.' The network of centres has been based on the principles of the 'Next Generation Planning handbook' and its associated 'Place Model'. The network consists of the following element:
  - Element 10 – The Activity Centres Place Type
    - Principal Activity Centre
    - Major Activity Centre
    - District Activity Centre

Centre Attributes

- The Activities Centres Place Type include the following attributes:
  - **The Activity Centres Place Type** – are places with a high mix of different but compatible uses within a compact form. This provides for vibrant centres with opportunities for social and economic exchange and are highly accessible. The combination of uses would span some or all of the primary urban land use categories of retail, office employment, residential, civic and community uses. Densities may vary, but generally most of the buildings in a mixed use business centre would be multi- storey with little or no single dwelling detached housing. Residential accommodation would be in multi-unit buildings, many of which would have other uses at ground level and perhaps on other

levels as well. Mixed use business centres are predominantly of a fine grain and generally do not have industrial land uses or any significant amount of warehousing or storage buildings.

- Activity centres are designed around a main street central core which provides the focus of the centre's employment and business activity.
- The principal activity centre and major activity centres may have multiple central cores which may contain different specialisations but provide complementary functions;
- The central core is readily identifiable with a fine grained intensively developed, mix of complementary uses;
- The activity centre's core will be framed and supported by complementary uses in a fringe area within an 800 metre walkable catchment including medium to high-intensity residential accommodation and commercial uses;
- Activity centres have a much higher density and scale to the surroundings and a strong vertical and horizontal mix of uses and activities with a high proportion of non residential activities such as retail, commercial, health, community, entertainment and educational uses;

Relevance to the Moreton Bay Regional Council region

- The Draft Strategic Framework forms a strategic planning document imbedded in the Planning Scheme;
- The Draft Strategic Framework has incorporated the SEQ Place Model as the base model for the framework;
- The district centre is recognised as a central focus of activity for the district community;
- The major centre is recognised as the central focus of activity for a sub-regional community; and
- The principal activity centre is recognised as the central focus of activity of the regional community;
- The Draft Strategic Framework identifies:
  - Principal Principal activity Principal activity centre
    - Caboolture;
    - Morayfield;
  - Major activity centres
    - Strathpine;
    - Redcliffe/Kippa-Ring; and
    - North Lakes;
  - District activity centres
    - Arana Hills;
    - Albany Creek;
    - Warner;

- Petrie;
- Kallangur;
- Margate;
- Deception Bay;
- Burpengary, and
- Bellara.

Centres Regulation

- The Draft Strategic Framework regulates development through a series of specific outcomes
- The Specific Outcomes consist of the following elements
  - Sustainability and Climate Change;
  - Natural Environment and Landscape;
  - Strong Communities;
  - Settlement Pattern and Urban Form;
  - Employment Location; and
  - Integrated Transport etc

Centres Design

- The activity centre's core will be framed and supported by complementary uses in a fringe area within an 800 metre walkable catchment;
- Activity centres have a much higher density and scale to the surroundings and a strong vertical and horizontal mix of uses

Implications for MBRC Retail & Commercial Sectors Needs Assessment

- The Draft Strategic Framework (SF) forms a strategic planning document imbedded in the Planning Scheme and the SF must align with the provisions of the SEQRP and the QPP.
- The Draft Strategic Framework has incorporated the SEQ Place Model as the base model for the framework.

The Caboolture Shire Planning Scheme 2005

The Caboolture Shire Plan is the planning scheme that set out to manage the growth to occur between 2005 and 2015 in the Caboolture district. The plan took effect from December 2005 and has recently been amended on 15 October 2012.

Centre Hierarchy/Network Methodology

- The Caboolture Shire Plan operates a 'Hierarchy' Centres Strategy.
- The hierarchy of centres within the Caboolture Shire consists of the following elements:
  - District Centre Zone

- Local Centre Zone
- Metropolitan Centre Zone

Centre Attributes

- The Activities Centres include the following attributes:
  - **District Centre -** Development in the District Centre is compatible with the function of the centre in respect to the Centres hierarchy. Mixed residential and commercial development is provided in a way that maximises reciprocal amenity and functionality. Uses provide for safety, comfort and enjoyment of workers, residents and visitors.
  - **Local Centre** – Development in the Local centres is small scale, and compatible with the function of the centre. A mix of uses is encouraged to service the convenience needs of the community in the centre catchment population.
  - **Metropolitan Centre –** The Metropolitan Centre is further divided into five Precincts:
    - *Precinct 1* – represents the Caboolture Town Centre and provides the primary administration, civic and commercial function in the Shire. High density retail, commercial and entertainment uses are encouraged.
    - *Precinct 2* – represents the Morayfield town centre. Retail and entertainment are the dominant uses in this area. Development that detracts from the function of Precinct 1 is discouraged.
    - *Precinct 3* - Mixed use areas with retail and commercial uses on the ground floor and residential uses above ground floor are provided.
    - *Precinct 4* - This precinct primarily consists of support commercial and service trade uses. Bulk retailing is encouraged with limited shops and offices
    - *Precinct 5* – This precinct primarily consists of Retail Showrooms, Shops and Service Industries are the predominant uses with offices minor only.

Relevance to the Moreton Bay Regional Council region

- High order commercial and community facilities are focussed around the Caboolture-Morayfield Centre as the 'Principal Activity Centre'.
- Medical and support services are established in a node focused around the Caboolture Hospital.

Centres Regulation

- Each centre is identified as a 'Zone'eg: Metropolitan Centre Zone; and development located within each 'Centre Zone' is further regulated by a specific 'Planning Area Code' eg: Metropolitan Centre Zone Planning Area Code.
- Elements listed within the 'Planning Area Codes' include:
  - Centre Character;
  - Building Height/Setbacks
  - Inclusive Design

- Landscaping; and
- Pedestrian Networks

Implications for MBRC Retail & Commercial Sectors Needs Assessment

- Although the Caboolture Scheme is now outdated, its centres strategies with respect to Metropolitan, Local and District Centres similarly align with the provisions of the QPP.
- The Caboolture Scheme is an example where centres are not heavily regulated.

The Pine Rivers Plan 2005

The Pine Rivers Plan is the planning scheme for the former Pine Rivers Shire that acts as a framework to manage the growth and developed within the former Pine Rivers Shire. The plan took effect from December 2005 and has recently been amended on 15 October 2012.

Centre Hierarchy/Network Methodology

- The Pine Rivers Plan operates a 'Hierarchy' Centres Strategy.
- The hierarchy of centres within the Pine Rivers Plan consists of the following elements:
  - Major Employment Centres Locality;
  - Urban Locality;
  - Village Locality; and
  - North Lakes Locality (is managed under the Mango Hill Development Control Plan)

Centre Attributes

- The Localities include the following attributes:
  - **Major Employment Centres Locality** – is a major centre including a range of retailing services including comparison shopping and showroom and speciality merchandising activity. This locality provides a broad range of compatible employment opportunities, general industries and mixed business and industry uses including community services and facilities, business, industry and commercial services; and intensive recreation, entertainment, community and cultural facilities and services. Strathpine, Brendale and North Lakes Town Centres are identified as multi-purpose, integrated centres. Strathpine is the major centre for the former shire.
- The *Major Employment Centres* Locality is further divided into the following 'Zones'
  - **Central Business Zone** - Forms the retail core of the Strathpine business area and provides a range of shopping, commercial and office facilities appropriate to service the major district/sub-regional catchment. The Central Business Zone accommodates retail, commercial, entertainment, recreational and leisure facilities. It also includes a single major shopping centre, smaller scale convenience retail developments, including supermarkets and shop front retailing, provide variety and choice within the central area.
  - **Commercial Zone** – provides a wide range of activities that complement, service and support the principal and high order functioning of the Central Business zone, and the town centre precinct at North Lakes e.g: car oriented showrooms, service stations, vehicle

sales etc. The Commercial Zone accommodates community and institutional facilities and provides a mix of business to business activities that are mutually supportive and service other business activities e.g: including small businesses co-located and interacting in multi-purpose premises etc

- **Local Business Zone -** Provides a mix and range of local neighbourhood retail/community facilities serving a local market and passing trade and integrated with the open space areas and the road transport networks in a conveniently accessible location. Land uses and activities are co-located and designed to integrate with other premises forming a centre for local shopping and community services.
- **Urban Locality** - The Urban Locality is used principally for residential purposes, including medium density residential development, and also for non-residential uses such as business and community centres containing shopping and office facilities.

• The *Urban Locality* is further divided into the following 'Zones'

- **Central Business Zone -** forms the retail area of the District Centre and includes a major shopping complex, showrooms, convenience and specialty retail developments, supermarket and shop front retailing. The Central Business Zone accommodates a range of retail, commercial, office, entertainment, community, recreational and leisure facilities required to service a wide cross-section of the community.
- **Commercial Zone** – provides a wide range of activities that complement service and support the principal and high order functioning of the Central Business zone e.g: car oriented showrooms, service stations, vehicle sales etc. The Commercial Zone accommodates community and institutional facilities and provides a mix of business to business activities that are mutually supportive and service other business activities e.g: including small businesses co-located and interacting in multi-purpose premises etc.
- **Local Business Zone -** Provides a mix and range of local neighbourhood retail/community facilities serving a local market and passing trade and integrated with the open space areas and the road transport networks in a conveniently accessible location. Land uses and activities are co-located and designed to integrate with other premises forming a centre for local shopping and community services.
- **Village Locality -** includes the Samford and Dayboro Villages which are predominantly urban in nature and include urban residential development, semi-urban residential development, local shopping, commercial, and industrial and community facilities. The Village Locality includes small scale uses which service tourist/day tripper activities and development while achieves a high standard of amenity for residents and neighours and maintains or enhances the low intensity and small scale village character of the locality;

• The *Village Locality* is further divided into the following 'Zones'

- **Village Centre Zone -** Development consolidates and reinforces the village centre as the community and commercial service centres for the western areas of the Shire. Development is designed, located and of a scale that enhances village character; and local shopping, commercial, community and recreation facilities and short term visitor/tourist accommodation are the predominant forms of development.

Relevance to the Moreton Bay Regional Council region

- The Pine Rivers Plan addresses and promotes a network of multipurpose activity centres ranging from major employment centres serving the region to local business convenience centres and village centres
- The Caboolture-Morayfield Principal Activity Centre is the intended Principal Activity Centre for retail, commercial, recreational, community and cultural uses in the former Pine Rivers Shire area
- Strathpine, Brendale and North Lakes Town Centres are identified as multi-purpose, integrated centres.
- Strathpine is the major centre for the former shire.

Centres Regulation

- Each Locality is regulated by 'Overall Outcomes' of a "Locality Code" eg: Village Locality Code;
- The Overall Outcomes of a 'Locality Code' include:
  - The role of the Locality;
  - Land uses envisaged for the Locality;
  - Form and nature of development etc
- A development is also regulated further by the Overall Outcomes of a "Zone Code" eg: Village Centre Zone Code
- The Overall Outcomes of a 'Zone Code' include:
  - The role of the Zone;
  - Land uses envisaged within the Zone;
  - Bulk and form of development within the zone etc
- Development located within a Locality is further regulated by the specific Design Codes
- These include:
  - Setbacks Code;
  - Landscape Code;
  - Access and Parking Code.

Implications for MBRC Retail & Commercial Sectors Needs Assessment

- The Caboolture-Morayfield Principal Activity Centre is the intended Principal Activity Centre for retail, commercial, recreational, community and cultural uses in the former Pine Rivers Shire area
- Strathpine, Brendale and North Lakes Town Centres are identified as multi-purpose, integrated centres.
- Strathpine is the major centre for the shire.

- The Pine Rivers Plan is an example of a plan that is highly prescriptive and without a focus on outcomes.

The Redcliffe City Planning Scheme 2005

The Redcliffe City Planning Scheme manages future development in Redcliffe by identifying the preferred locations for land uses. The scheme took effect from December 2005 and was amended on 17 October 2011.

Centre Hierarchy/Network Methodology

- The Redcliffe City Planning Scheme operates a 'Hierarchy' Centres Strategy.
- The hierarchy of centres within the Redcliffe City consists of the following elements:
  - Retail Core Zone
  - Frame Business Zone

Centre Attributes

- The Activities Centres include the following attributes:
  - **Retail Core Zone** - has the city's highest order and most intense retail and commercial uses. The Retail Core Centre provides a range of commercial and retail facilities with integrated accommodation, community uses and entertainment. Buildings are of a medium scale and density.
- The Retail Core Zone is further divided into 'Preferred Use Areas'
- The Preferred Use Areas for the **Retail Core Zone** include the following:
  - **Preferred Use Area 5** - Redcliffe Seaside Village provides a specialist and convenience retail area and caters for the leisure and entertainment needs of local residents, workers and visitors.
  - **Preferred Use Area 6 -** Kippa-Ring Village is the City's primary retail node catering mainly for convenience and comparison retailing.
  - **Preferred Use Area 7 –** Margate Village provides the higher order retail and commercial role of a centre serving mainly City residents.
  - **Preferred Use Area 8 –** Scarborough Seaside Village is a centre providing a strong leisure and entertainment focus catering to both residents and visitors.
  - **Preferred Use Area 9 –** Woody Point Village is a centre serving residents and visitors with a strong specialist role for arts and crafts.
- **Frame Business Zone –** has a lesser scale and intensity than the Retail Core Zone. A range of retail and commercial uses supports but does not diminish or directly compete with the Retail Core Zone. Where located in an urban village, Frame Business Zone businesses have a lesser scale and intensity than in the Retail Core Zone.
- The Frame Business Zone is further divided into 'Preferred Use Areas'. The Preferred Use Areas for the **Frame Business Zone** include the following:

- **Preferred Use Area 10** - Preferred Use Area 10 – Mixed Uses provides a mixture of business, commercial and residential uses and provide a vibrant, safe and interesting pedestrian environment.
- **Preferred Use Area 11** Business and Offices: provides primarily business premises with a government or non-government function.
- **Preferred Use Area 12** – Local Services: provides a wide variety of service trades and smaller industrial uses that serve local residents and workers.
- **Preferred Use Area 13 –** Showrooms: provides showrooms/ superstores where the individual tenancy has a gross floor area of 500m2 or more.
- **Preferred Use Area 13A –** Convenience retailing: entertainment and outdoor sales, provides convenience facilities, with the balance of the precinct used for outdoor sales premises.
- **Preferred Use Area 14 –** Automotive Based Business and Industry: provides a concentrated area for vehicle sales, servicing and repair activities, as well as shops, including showrooms / superstores (where the individual tenancy of the showroom / superstore is less than 500m2) and business premises**.**

Relevance to the Moreton Bay Regional Council region

- The Redcliffe City Scheme identifies :
  - Redcliffe/Kippa Ring urban village - **Major Activity Centre** in accordance with the provisions of the SEQ Regional Plan.

Centres Regulation

- Each Zone is regulated by a specific 'Zone Code' eg: Retail Centre Core Zone Code
- Elements listed within the 'Zone Codes' include:
  - Scale and Form; and
  - Bulk and density requirements within each 'Preferred use area.'
- Development located within the Retail Core Zone or the Frame Business Zone is further regulated by the 'Business and Commercial Uses Code '.
- Elements listed within the Business and Commercial Uses Code include:
  - Building Design
  - Setbacks
  - Carparking requirements
- The Business and Commercial Uses Code also provides design requirements for specific uses ie Service Station, Showrooms/Superstores etc.

Implications for MBRC Retail & Commercial Sectors Needs Assessment

- The Redcliffe City Scheme identifies :

  - Redcliffe/Kippa Ring urban village - **Major Activity Centre** in accordance with the provisions of the SEQ Regional Plan.
- The Redcliffe Scheme probably has too many levels of hierarchy with respect to the number of precincts etc.

Mango Hill Infrastructure Development Control Plan 1998

The Mango Hill Infrastructure Development Control Plan (DCP) provides a mechanism for planning and managing development to that part of North Lakes currently being developed as the North Lakes Estate. The DCP together with the subsequent precinct and sector plans provide the basis for all assessment and development approval within the North Lakes Estate.

Centre Hierarchy/Network Methodology

- The Mango Hill DCP operates a 'Hierarchy' Centres Strategy.
- Through the structure plan, the DCP area is broadly divided into a number of land use structural elements:
  - Town Centre Core;
  - Town Centre Frame; and
  - Mixed Industry and Business Area (MIBA)

Centre Attributes

- The Key structural elements include the following attributes:
  - **Town Centre Core** - The town centre core is intended to provide the focus for major retail, commercial, cultural, entertainment, leisure, and related development, possibly integrated with high density residential accommodation in either stand-alone buildings or as part of mixed use developments. The town centre core will become the focus for a Major Employment Centre in the northern growth corridor
  - **Town Centre Frame** - The town centre frame is intended to provide for a wide range of support activities and services to the town centre core together with various forms of medium and high density residential. A primary focus of development in the town centre frame, like the town centre core, is to support the creation of a Major Employment Centre in the northern growth corridor of the Shire. The range of employment opportunities in the town centre frame is more likely to be oriented towards service and support activities rather than the higher order retailing and business activities found in the town centre core.
  - **Mixed Industry and Business Area (MIBA) -** The MIBA is intended to provide a broad range of commercial and professional services, office services and service trades, technology manufacturing and servicing, tertiary level and other educational facilities, tourist and recreational facilities, and institutional and community uses, all in a managed landscaped environment enjoying high exposure and accessibility to the Bruce Highway. The form and intensity of MIBA development characteristically will be low to medium rise with the potential for occasional high rise, all developed within a landscaped garden setting.

Relevance to the Moreton Bay Regional Council region

- The Mango Hill DCP identifies the 'Town Centre Core' precinct as the major physical, social, commercial, and functional focus of the DCP.
- The Town Centre Frame of DCP provides the support services and facilities to the 'Town Centre Core.'
- The Mango Hill addresses and promotes a network of multi-purpose activity centres
- The Mango Hill DCP recognises and encourages mixed use centres reflective of the SEQRP and QPP provisions.

Centres Regulation

- Each 'Land Use Element is regulated by Desired Environmental Outcomes (DEOs) and Planning intent for each specific 'Land Use Element' eg. Town Centre Core
- 'Development Intent' for the specific Land Use Element includes:
  - Development Character; and
  - Administrative and Commercial;
  - Recreation, Entertainment and Leisure;
  - Residential
  - Public Transport Corridor
- Development located within the Town Centre Core, Town Centre Frame or MIBA is further regulated by 'Design and Siting Measures'.
- Elements listed within the 'Design and Siting Measures include:
  - Site Coverage
  - Setbacks
  - Landscaping
  - Signage;
  - Carparking requirements etc
- Where a matter is not dealt with under the DCP, the provisions of the Pine Rivers Shire Plan take precedence.

Implications for MBRC Retail & Commercial Sectors Needs Assessment

- The Mango Hill DCP recognises and encourages mixed use centres reflective of the SEQRP and QPP provisions.

Mango Hill Local Area Plan

The Mango Hill Local Area Plan is a policy development by the former Pine Rivers Shire Council to provide detailed planning provisions for the future development of land located within Mango Hill. The Plan is one of three (3) Local Area Plans prepared as part of the 'Northern Growth Corridor' Planning Project.

This Plan was prepared as an interim step towards the subsequent development and adoption of a Structure Plan under the SEQ Regional Plan, one of the principal instruments for establishing the desired use of land and the preferred timing of development within the Urban Footprint. As such, it establishes a broad structure, layout, appropriate land uses and infrastructure corridors required for future development and community needs within the Mango Hill Local Area Plan Area.

Centre Hierarchy/Network Methodology

- The Mango Hill Local Area Plan operates a 'Networks' Centres Strategy.
- The network of centres within the Mango Hill LAP consists of the following Precincts:
  - Mango Hill Village;
  - Kinsella Heights
  - Halpine Lake
  - Halpine Drive and Employment Centre

Centre Attributes

- The Precincts include the following attributes:
  - **Mango Hill Village** - Local Centre focused on the intersection of Kinsellas Road West with Lamington Street and Chelmsford Road. A combined maximum of 700m^2 gross leasable area of retail uses are intended within this Local Centre, with a maximum individual tenancy size of retail uses of not more than 500m^2 gross leasable area. The centre is to be limited to one supermarket/ mini-major/ grocery store. Additional commercial, community uses may be located within or adjoining this centre providing a combined maximum of 1,500m^2 gross leasable area of retail/commercial /community uses.
  - **The Kinsella Heights -** Local Centre is focussed around the intersection of the Mango Hill Ring Road with the Collector/Bus Collector to form an integrated centre. A combined maximum of 3,000m2 gross leasable area of retail uses are intended to be provided within this Local Centre, with a maximum individual tenancy size of retail/ commercial uses of not more than 1,000m^2 gross leasable area. The centre is not intended to contain more than one supermarket/ mini-major/ grocery store.
  - **Halpine Lakes** –Local Centre is located near the North-South Urban Arterial Road and is intended to contain convenience uses and a 24-hour service station to service passing trade along the arterial road. A combined maximum of 600m2 gross leasable area of retail/commercial/service station uses is intended within this Convenience Centre.
  - **The Halpine Drive** Local Centre is located on the eastern side of Halpine Drive and south of the Mango Hill Ring Road and is to contain mixed use development with building heights of up to three stories. A combined maximum of 2,500m2 gross leasable area of retail/ commercial uses are intended within this Local Centre with a maximum individual tenancy size of retail/ commercial uses of not more than 1,000m2 gross leasable area. The Local Centre is not intended to contain more than one supermarket/ mini-major/ grocery store.

Relevance to the Moreton Bay Regional Council region

- The provisions of the Pine Rivers Shire Plan prevail over any assessment of development within the Mango Hill Local Area Plan.
- The centres are to provide a local function that does not compete with the North Lakes Major Centre, and contain a range of uses (i.e. are not entirely comprised of retail/ food retailing uses).

Centres Design

- Local Centres generally serve neighbourhoods of 1,000–3,000 households and provide for traditional convenience shopping trips.
- Local centres have total gross leasable areas for retail uses of between 600m^2 –3,000m^2.

Implications for MBRC Retail & Commercial Sectors Needs Assessment

- The Mango Hill LAP is outdated as it was introduced as an interim step towards the development and adoption of the SEQRP.

Griffin Local Area Plan

The Griffin Local Area Plan is a policy development by the former Pine Rivers Shire Council to provide detailed planning provisions for the future development of land located within Griffin. The Plan is one of three (3) Local Area Plans prepared as part of the 'Northern Growth Corridor' Planning Project. The plan was prepared as an interim step prior to the adoption of the Strategic Plan under the SEQ Regional Plan. The Local Area Plan is used by Council in assessing applications for development located within Griffin.

Centre Hierarchy/Network Methodology

- The Griffin Local Area Plan operates a 'Network' Centres Strategy.
- The network of centres within the Griffin LAP consists of the following local activity centres:
  - Local Activity Centre A1
  - Local Activity Centre A2

Centre Attributes

- The Local Activity Centres include the following attributes:
  - **Local Activity Centre (LA 1)** - is located on the north side of Brays Road, close to the North-South Urban Arterial Road
  - **Local Activity Centre (LA 2)** – is located northern side of Dohles Rocks Road, close to the Bruce Highway
- The Local centres area intended to primarily provide for the daily convenience needs of local residents. The centres would also be expected to draw patronage from public transport or private vehicle travellers passing the respective sites for other travel purposes.
- The local activity centres are not intended to attain a size or range of functions that would either draw a high proportion of custom or act as a draw for special purpose trips from

outside of the local convenience catchment. A maximum retail gross floor area of 1,800 m^2 applies to each of the centres unless the need for a larger centre is demonstrated to the satisfaction of Council through a retail needs assessment study.

Relevance to the Moreton Bay Regional Council region

- Local activity centres are intended to provide for the daily convenience needs of local residents.
- The centres are not intended to attain a size or range of functions that would draw custom from outside of the local convenience catchment.

Centres Regulation

- The local activity centres are to be 'master planned' and incorporate key design elements such as:
  - building orientation;
  - positioning of doors and windows;
  - weather protection;
  - pedestrian movement paths and levels;
  - outdoor seating and service access; and
  - creation of integrated centre characters.
- The provisions of the Pine Rivers Shire Plan prevail over any assessment of development within the Griffin Local Area Plan.
- The Griffin Local Area Plan applies to all development regulated by the Pine Rivers Shire Plan which is located with the local plan area

Implications for MBRC Retail & Commercial Sectors Needs Assessment

- The Griffin LAP is outdated as it was introduced as an interim step towards the development and adoption of the SEQRP.

Dakabin Local Area Plan

The Dakabin Local Area Plan is a policy development by the former Pine Rivers Shire Council to provide detailed planning provisions for the future development of land located within Dakabin. The Plan is one of three (3) Local Area Plans prepared as part of the 'Northern Growth Corridor' Planning Project. The plan was prepared as an interim step prior to the adoption of the Strategic Plan under the SEQ Regional Plan. The Local Area Plan was used by Council in assessing applications for development located within Dakabin.

Centre Hierarchy/Network Methodology

- The Dakabin Local Area Plan operates a 'Network' Centres Strategy.
- The network of centres within the Dakabin LAP consists of the following Precincts:
  - Dakabin West (LA-1)

– Dakabin Central (LA-2)

Centre Attributes

- The Precincts include the following attributes:
  - **Dakabin West (LA-1)** – Local Activity Centre is located on the northern side of Alma Road at its western end. The location of this centre anticipates the relocation of the Dakabin Railway Station to an adjacent position. A maximum gross floor area of 500m^2 of retail space applies to the centre. It is intended that a small convenience store will use approximately 250m^2 of this space with the other 250m^2 intended for other tenancies such as video hire, takeaway food, off-licence bottle shop or similar.
  - **Dakabin Central (LA-2) -** Local Activity Centre is located on the south-western corner of the Old Gympie Road – Alma Road intersection. This centre is expected to be more vehicle-orientated in its design and character and may allow for a service station on the same site. A maximum gross floor area of 1,000 m^2 of retail space applies to the centre. This is expected to take the form of a small convenience store of approximately 450m with the remaining 550m to be taken up by with other retail tenancies such as video hire, takeaway food, off-licence bottle shop. Other complementary community or non-retail commercial services may also be established at the centre.

Relevance to the Moreton Bay Regional Council region

- Local activity centres are intended to provide for the daily convenience needs of local residents.
- The centres are not intended to attain a size or range of functions that would draw custom from outside of the local convenience catchment.

Centres Regulation

- The provisions of the Pine Rivers Shire Plan prevail over any assessment of development within the Dakabin Local Area Plan.
- The Dakabin Local Area Plan applies to all development regulated by the Pine Rivers Shire Plan which is located within the local plan area.

Implications for MBRC Retail & Commercial Sectors Needs Assessment

- The Dakabin LAP is outdated as it was introduced as an interim step towards the development and adoption of the SEQRP.

Centres Network Benchmarking

A review of other approaches to centres networks and hierarchies was prepared to inform the identification of an appropriate centres network for Moreton Bay Regional Council.

Regional Level Hierarchies

Moves towards the development of regional plans in addition to local level planning have resulted in the establishment of a variety of regional hierarchies around Australia. Figure A.4

below provides an overview of various major metropolitan based hierarchies identified by regional planning instruments.

A snapshot of the various levels within the activity centres hierarchy planned for SEQ, Sydney, Melbourne, Perth, Adelaide and the Australian Capital Territory indicate that hierarchies typically contain a range from higher order activity centres through to lower order activity centres. Categories such as specialised activity centres and stand-alone shopping centres do not fit in conventional hierarchies, but are a recognition that new types of activity clusters have emerged. Notably, the SEQ Regional Plan hierarchy chooses not to identify lower order centres, apparently preferring to leave this to local level planning instruments.

Figure A.4: Activity Centre Hierarchies in Australia-Regional Planning Hierarchies

Hierarchy	SEQ	Sydney	Melbourne	Perth	Adelaide	ACT
Higher order	Primary Activity Centre	Global Sydney	Melbourne Central Activity Centre	Perth Central Area	Adelaide City Centre	City Centre
	Principal Activity Centre	Regional City	Central Activity Centre	Primary Centre	Regional Centre	Town Centre
	Major Activity Centre	Major Centre	Principal Activity Centre	Strategic Centre	Major District Centre	Group Centre
	Specialist Activity Centre	Specialised Centre	Major Activity Centre	Regional Centre	District Centre	Local Centre
		Town Centre	Specialised Activity Centre	District Centre	Bulky Goods Centre	
		Stand Alone Shopping Centre	Neighbourhood Activity Centre	Neighbourhood Centre	Specialist Centre	
		Village		Local Centre	Neighbourhood Centre	
		Small Village			Local Centre	
Lower order		Neighbourhood Centre				

Table A.1 below provides a brief summary of centre hierarchy approaches across a variety of local government areas across Australia. The table provides a diverse range of community types to allow for a more holistic comparison. The table attempts to categories centres from other communities into a hierarchy similar to that set out by the Queensland Planning Provisions. The centres described in the table below are not meant to be definitive, rather they are discussed as examples.

Table A.1: Comparison of Centre Hierarchies - Local Government Level

Local Government	Principal Activity Centre	Major Activity Centres	District Activity Centres
Ipswich			
Forms part of the western growth corridor of SEQ and is anticipated to experience high levels of population growth. Has traditionally suffered from significant	Ipswich CBD: historic service centre for Ipswich residents. Provides a broad range of uses, including shopping, offices, government services, hospital, etc. Recent major centre investment include Riverlink Shopping Centre, Ikon office	Goodna: currently limited to a collection of disconnected retail and commercial developments. The Goodna Town Centre Masterplan outlines the future growth for the Town Centre (~40,000m^2). Ripley: Designated centre to	Centres are located at Redbank, Redbank Plains, Booval, Brassall, Karalee, Yamanto and Walloon. The focus of these centres is to cater for the day-today needs of their host communities, however the scale of these centres varies significantly with some

expenditure and employment leakage to Brisbane. Ipswich has two Principal Activity Centres	development and proposed redevelopment of Ipswich Mall. Springfield: Existing facilities include: Orion Springfield, a 23,000m^2 shopping centre anchored by a discount department store and a supermarket; Education City, an educational precinct incorporating campuses of the University of Southern Queensland and the Bremer Institute of TAFE and approximately 15,000m2 of office floor space. The Springfield Town Centre Concept Plan identifies a range of maximum floor spaces for the Town Centre including some 200,000m^2 of office (town and special business), 150,000m^2 of retail and bulky goods, 140,000m^2 of service trade facilities and 30,000m^2 of health care facilities at completion.	service the needs of the emerging Ripley Valley population, located further to the west of Springfield. Town Centre (urban core) on completion is proposed to provide ~145,000m^2 of retail floor space, as well as a significant office component of up to 52,000m^2 along with other entertainment, leisure and residential facilities.	centres limited to be supermarket anchored centres while other host DDS's and other forms of higher order retail, community and commercial functions.
Cairns			
Cairns has above average per capita supply of retail floor space due to a significant tourist market. Population about 250,000 persons. Hierarchy as per FNQ Regional Plan.	Has a strong international function for some activities, especially the tourism sector. 150,000m^2 retail floor space. Myer Department Store, Target DDS, Coles	Smithfield: 30,300m^2 major sub-regional shopping centre with Kmart DDS, 2 Supermarkets. Bulky Goods and light industry/business park elements. Earlville: Stockland Cairns is the largest retail shopping complex in the region at almost 50,000m^2, Big W and Target DDS, 2 Supermarkets.	District centres located at Redlynch, Mount Sheridan and Manunda. District centres range from between 5,000m^2 and 15,000m^2. Most are anchored by full line supermarkets although, Mt Sheridan has recently opened a DDS.
Mackay			
Population of approximately 110,000 persons. Less obvious hierarchy of centres, largely associated with trends towards suburban shopping centres in 1980s. CBD remains dominant centre due to location of Canelands Plaza in CBD.	Has the region's highest order retail, commercial and community service functions (including hospital, state government regional offices). Approximately 85,000m^2 of retail floor space including Myer and two DDS's and two supermarkets. Commercial functions have tended to locate along Nebo Road (major arterial into CBD)	Mt Pleasant: 22,000m^2 of retail floor space including DDS and supermarket. Is the second largest enclosed shopping centre within Mackay behind Canelands Plaza (Located within CBD fringe). Mt Pleasant is framed by retail showrooms and bulky goods outlets.	Sarina: coastal community located approximately 35 km south of from Mackay CBD. Population of 3,500 persons, but provides services to other coastal communities. Approximately 11,000m^2 of retail anchored by a Woolworths supermarket.
Canberra			
Australia's largest inland city, with a	Large government administration sector, allied	Belconnen: 340,000m^2 floor space, major regional	Queanbeyan: 20km from Canberra CBD, population

population of about 345,000 persons. Canberra has a very large government workforce and a highly structured distribution of centres with a clear hierarchy.	private services, 400,000m^2 floor space, 2 Department Stores in a regional shopping centre. Pedestrian mall is the focus of the CBD. Major community facilities include convention centre, casino, park.	shopping centre with DS, DDS, supermarkets, bulky goods, cinema. Government and private offices, light industrial and community facilities surround shopping centre. Woden: 290,000m^2 floor space, major regional shopping centre with DS, DDS, supermarkets, bulky goods, cinema. Offices, community facilities in frame Tuggeranong: Town Centre on lake and has 250,000m^2 floor space, major regional centre with DS, DDS, supermarkets, cinemas, offices. College, arts centre, government offices, light industrial surround shopping centre	40,000. CBD plus smaller centres. CBD includes DDS, supermarkets, office, district hospital, council offices park council offices, clubs. Yass: 50km from Canberra, population 15,000. Centre comprises main street retail, council offices, district hospital, TAFE, library, offices
Launceston			
Launceston has a population of approximately 65,000 persons. It is second largest population centre in Tasmania. It is the major service centre for Northern Tasmania, and major industries include retail, health, education and manufacturing. Launceston has a tiered hierarchy of activity centres	The CBD of Launceston comprises a mix of retailers and some higher order commercial services. The CBD hosts a number of department stores, including Harris Scarfe, DDS and Myer, and the total volume of retail floor space is in the order of 56,000m^2. Includes pedestrian mall, hospital, parks, offices, library, TAFE, hotels	Launceston is supported by two district centres, in the suburbs of Kings Meadows and Mowbray, each supporting approximately 21,000m^2 and 13,000m^2 of retail floorspace respectively	Various small towns and villages, with centres only serving a local need.

APPENDIX B

DETAILED RETAIL EXPENDITURE TABLES

Table B.1: Weekly retail expenditure patterns of catchment area households, 2012-2031 (2011 dollars)

	2012	2016	2021	2026	2031
Albany Creek					
Groceries & take home food	$235.73	$239.28	$245.33	$251.52	$257.87
Dining & take-away food (incl. on-premise liquor)	$123.78	$125.64	$128.82	$132.07	$135.40
Clothing, footwear & apparel	$75.05	$76.18	$78.11	$80.08	$82.10
Personal & other goods	$100.61	$102.12	$104.70	$107.35	$110.06
Core bulky goods	$61.97	$62.90	$64.49	$66.12	$67.79
Ancillary bulky goods	$83.17	$84.42	$86.55	$88.74	$90.98
Hardware	$24.05	$24.41	$25.03	$25.66	$26.31
Takeaway liquor	$28.54	$28.97	$29.71	$30.46	$31.23
Total Grocery & Specialty	***$563.71***	***$572.21***	***$586.65***	***$601.47***	***$616.66***
Total Bulky Goods	***$169.19***	***$171.74***	***$176.08***	***$180.52***	***$185.08***
Total	***$732.90***	***$743.95***	***$762.73***	***$781.99***	***$801.74***
Bribie Island					
Groceries & take home food	$188.70	$191.55	$196.39	$201.35	$206.43
Dining & take-away food (incl. on-premise liquor)	$80.42	$81.64	$83.70	$85.81	$87.98
Clothing, footwear & apparel	$51.49	$52.26	$53.58	$54.94	$56.32
Personal & other goods	$64.08	$65.04	$66.68	$68.37	$70.09
Core bulky goods	$40.27	$40.88	$41.91	$42.97	$44.06
Ancillary bulky goods	$53.12	$53.92	$55.28	$56.68	$58.11
Hardware	$15.82	$16.06	$16.46	$16.88	$17.31
Takeaway liquor	$22.84	$23.19	$23.77	$24.37	$24.99
Total Grocery & Specialty	***$407.54***	***$413.68***	***$424.13***	***$434.84***	***$445.82***
Total Bulky Goods	***$109.22***	***$110.86***	***$113.66***	***$116.53***	***$119.47***
Total	***$516.75***	***$524.54***	***$537.79***	***$551.37***	***$565.29***
Burpengary - Narangba					
Groceries & take home food	$189.81	$192.68	$197.54	$202.53	$207.64
Dining & take-away food (incl. on-premise liquor)	$92.60	$94.00	$96.37	$98.80	$101.30
Clothing, footwear & apparel	$62.83	$63.78	$65.39	$67.04	$68.73
Personal & other goods	$75.87	$77.01	$78.96	$80.95	$82.99
Core bulky goods	$50.27	$51.02	$52.31	$53.63	$54.99
Ancillary bulky goods	$68.53	$69.56	$71.32	$73.12	$74.96
Hardware	$18.03	$18.30	$18.76	$19.23	$19.72
Takeaway liquor	$23.20	$23.54	$24.14	$24.75	$25.37
Total Grocery & Specialty	***$444.31***	***$451.01***	***$462.39***	***$474.07***	***$486.04***
Total Bulky Goods	***$136.82***	***$138.88***	***$142.39***	***$145.98***	***$149.67***
Total	***$581.12***	***$589.89***	***$604.78***	***$620.05***	***$635.71***
Caboolture East					
Groceries & take home food	$188.88	$191.73	$196.57	$201.53	$206.62
Dining & take-away food (incl. on-premise liquor)	$82.33	$83.57	$85.68	$87.85	$90.07
Clothing, footwear & apparel	$53.27	$54.07	$55.43	$56.83	$58.27
Personal & other goods	$65.92	$66.92	$68.61	$70.34	$72.12
Core bulky goods	$41.84	$42.47	$43.54	$44.64	$45.77
Ancillary bulky goods	$55.54	$56.37	$57.80	$59.26	$60.75
Hardware	$16.17	$16.41	$16.82	$17.25	$17.68
Takeaway liquor	$22.90	$23.24	$23.83	$24.43	$25.05
Total Grocery & Specialty	***$413.30***	***$419.53***	***$430.12***	***$440.98***	***$452.12***
Total Bulky Goods	***$113.54***	***$115.25***	***$118.16***	***$121.15***	***$124.21***
Total	***$526.84***	***$534.78***	***$548.29***	***$562.13***	***$576.33***
Caboolture Hinterland					
Groceries & take home food	$189.22	$192.07	$196.92	$201.90	$207.00
Dining & take-away food (incl. on-premise liquor)	$86.10	$87.40	$89.61	$91.87	$94.19
Clothing, footwear & apparel	$56.78	$57.63	$59.09	$60.58	$62.11

	2012	2016	2021	2026	2031
Personal & other goods	$69.58	$70.63	$72.41	$74.24	$76.11
Core bulky goods	$44.93	$45.61	$46.76	$47.94	$49.16
Ancillary bulky goods	$60.31	$61.22	$62.76	$64.35	$65.97
Hardware	$16.85	$17.10	$17.54	$17.98	$18.43
Takeaway liquor	$23.01	$23.35	$23.94	$24.55	$25.17
Total Grocery & Specialty	***$424.69***	***$431.09***	***$441.98***	***$453.14***	***$464.58***
Total Bulky Goods	***$122.09***	***$123.93***	***$127.06***	***$130.27***	***$133.56***
Total	***$546.78***	***$555.02***	***$569.04***	***$583.41***	***$598.14***
Caboolture Midwest					
Groceries & take home food	$189.81	$192.68	$197.54	$202.53	$207.64
Dining & take-away food (incl. on-premise liquor)	$92.61	$94.01	$96.38	$98.82	$101.31
Clothing, footwear & apparel	$62.84	$63.79	$65.40	$67.05	$68.74
Personal & other goods	$75.88	$77.02	$78.97	$80.96	$83.00
Core bulky goods	$50.27	$51.03	$52.32	$53.64	$55.00
Ancillary bulky goods	$68.54	$69.57	$71.33	$73.13	$74.98
Hardware	$18.03	$18.30	$18.76	$19.24	$19.72
Takeaway liquor	$23.20	$23.55	$24.14	$24.75	$25.37
Total Grocery & Specialty	***$444.34***	***$451.04***	***$462.43***	***$474.10***	***$486.07***
Total Bulky Goods	***$136.84***	***$138.90***	***$142.41***	***$146.01***	***$149.69***
Total	***$581.18***	***$589.94***	***$604.84***	***$620.11***	***$635.77***
Caboolture Morayfield					
Groceries & take home food	$188.97	$191.82	$196.66	$201.63	$206.72
Dining & take-away food (incl. on-premise liquor)	$83.34	$84.60	$86.73	$88.92	$91.17
Clothing, footwear & apparel	$54.21	$55.02	$56.41	$57.84	$59.30
Personal & other goods	$66.90	$67.91	$69.63	$71.38	$73.19
Core bulky goods	$42.67	$43.31	$44.41	$45.53	$46.68
Ancillary bulky goods	$56.81	$57.67	$59.13	$60.62	$62.15
Hardware	$16.35	$16.60	$17.01	$17.44	$17.88
Takeaway liquor	$22.93	$23.27	$23.86	$24.46	$25.08
Total Grocery & Specialty	***$416.35***	***$422.62***	***$433.30***	***$444.24***	***$455.45***
Total Bulky Goods	***$115.83***	***$117.58***	***$120.54***	***$123.59***	***$126.71***
Total	***$532.18***	***$540.20***	***$553.84***	***$567.83***	***$582.16***
Central Pine West					
Groceries & take home food	$225.12	$228.51	$234.28	$240.20	$246.26
Dining & take-away food (incl. on-premise liquor)	$116.71	$118.46	$121.46	$124.52	$127.67
Clothing, footwear & apparel	$72.35	$73.45	$75.30	$77.20	$79.15
Personal & other goods	$95.02	$96.45	$98.89	$101.38	$103.94
Core bulky goods	$59.38	$60.27	$61.79	$63.36	$64.96
Ancillary bulky goods	$79.96	$81.16	$83.21	$85.32	$87.47
Hardware	$22.68	$23.02	$23.61	$24.20	$24.81
Takeaway liquor	$27.31	$27.72	$28.42	$29.14	$29.88
Total Grocery & Specialty	***$536.51***	***$544.60***	***$558.35***	***$572.45***	***$586.90***
Total Bulky Goods	***$162.02***	***$164.46***	***$168.62***	***$172.87***	***$177.24***
Total	***$698.53***	***$709.06***	***$726.96***	***$745.32***	***$764.14***
Dakabin-Kallangur-Murrumba Downs					
Groceries & take home food	$189.49	$192.34	$197.20	$202.18	$207.29
Dining & take-away food (incl. on-premise liquor)	$89.02	$90.36	$92.65	$94.99	$97.38
Clothing, footwear & apparel	$59.50	$60.39	$61.92	$63.48	$65.08
Personal & other goods	$72.40	$73.49	$75.35	$77.25	$79.20
Core bulky goods	$47.33	$48.04	$49.26	$50.50	$51.77
Ancillary bulky goods	$64.00	$64.96	$66.60	$68.28	$70.01
Hardware	$17.38	$17.64	$18.09	$18.54	$19.01
Takeaway liquor	$23.09	$23.44	$24.03	$24.64	$25.26
Total Grocery & Specialty	***$433.50***	***$440.03***	***$451.14***	***$462.54***	***$474.22***
Total Bulky Goods	***$128.70***	***$130.64***	***$133.94***	***$137.33***	***$140.79***

	2012	2016	2021	2026	2031
Total	***$562.20***	***$570.68***	***$585.09***	***$599.86***	***$615.01***
Griffin-Mango Hill					
Groceries & take home food	$193.47	$196.38	$201.34	$206.43	$211.64
Dining & take-away food (incl. on-premise liquor)	$95.61	$97.05	$99.50	$102.02	$104.59
Clothing, footwear & apparel	$64.31	$65.28	$66.93	$68.62	$70.35
Personal & other goods	$78.36	$79.54	$81.55	$83.60	$85.72
Core bulky goods	$51.65	$52.43	$53.75	$55.11	$56.50
Ancillary bulky goods	$70.39	$71.45	$73.26	$75.11	$77.00
Hardware	$18.60	$18.88	$19.36	$19.85	$20.35
Takeaway liquor	$23.63	$23.99	$24.59	$25.21	$25.85
Total Grocery & Specialty	***$455.38***	***$462.25***	***$473.92***	***$485.88***	***$498.15***
Total Bulky Goods	***$140.64***	***$142.76***	***$146.36***	***$150.06***	***$153.85***
Total	***$596.02***	***$605.00***	***$620.28***	***$635.94***	***$652.00***
Hills District/Samford					
Groceries & take home food	$226.11	$229.52	$235.31	$241.25	$247.35
Dining & take-away food (incl. on-premise liquor)	$117.36	$119.13	$122.14	$125.23	$128.39
Clothing, footwear & apparel	$72.61	$73.70	$75.56	$77.47	$79.43
Personal & other goods	$95.54	$96.98	$99.43	$101.94	$104.51
Core bulky goods	$59.62	$60.52	$62.05	$63.61	$65.22
Ancillary bulky goods	$80.26	$81.47	$83.53	$85.63	$87.80
Hardware	$22.81	$23.15	$23.74	$24.34	$24.95
Takeaway liquor	$27.43	$27.84	$28.54	$29.26	$30.00
Total Grocery & Specialty	***$539.04***	***$547.17***	***$560.99***	***$575.15***	***$589.67***
Total Bulky Goods	***$162.69***	***$165.14***	***$169.31***	***$173.59***	***$177.97***
Total	***$701.73***	***$712.31***	***$730.30***	***$748.74***	***$767.64***
Lawnton - Bray Park					
Groceries & take home food	$189.50	$192.36	$197.22	$202.20	$207.30
Dining & take-away food (incl. on-premise liquor)	$89.17	$90.52	$92.80	$95.15	$97.55
Clothing, footwear & apparel	$59.64	$60.53	$62.06	$63.63	$65.24
Personal & other goods	$72.55	$73.64	$75.50	$77.41	$79.36
Core bulky goods	$47.45	$48.17	$49.38	$50.63	$51.91
Ancillary bulky goods	$64.19	$65.16	$66.80	$68.49	$70.22
Hardware	$17.41	$17.67	$18.11	$18.57	$19.04
Takeaway liquor	$23.10	$23.44	$24.04	$24.64	$25.27
Total Grocery & Specialty	***$433.95***	***$440.49***	***$451.62***	***$463.02***	***$474.71***
Total Bulky Goods	***$129.05***	***$130.99***	***$134.30***	***$137.69***	***$141.17***
Total	***$563.00***	***$571.48***	***$585.92***	***$600.71***	***$615.88***
Petrie/Dayboro					
Groceries & take home food	$199.95	$202.96	$208.09	$213.34	$218.73
Dining & take-away food (incl. on-premise liquor)	$99.93	$101.44	$104.00	$106.62	$109.32
Clothing, footwear & apparel	$65.96	$66.95	$68.64	$70.38	$72.16
Personal & other goods	$81.77	$83.00	$85.10	$87.24	$89.45
Core bulky goods	$53.23	$54.03	$55.40	$56.80	$58.23
Ancillary bulky goods	$72.35	$73.44	$75.29	$77.20	$79.14
Hardware	$19.44	$19.73	$20.23	$20.74	$21.26
Takeaway liquor	$24.38	$24.75	$25.38	$26.02	$26.67
Total Grocery & Specialty	***$471.99***	***$479.10***	***$491.20***	***$503.60***	***$516.32***
Total Bulky Goods	***$145.02***	***$147.20***	***$150.92***	***$154.73***	***$158.64***
Total	***$617.00***	***$626.31***	***$642.12***	***$658.33***	***$674.96***
Redcliffe					
Groceries & take home food	$189.08	$191.93	$196.78	$201.75	$206.84
Dining & take-away food (incl. on-premise liquor)	$84.56	$85.84	$88.00	$90.23	$92.50
Clothing, footwear & apparel	$55.34	$56.18	$57.59	$59.05	$60.54
Personal & other goods	$68.08	$69.11	$70.85	$72.64	$74.48

	2012	2016	2021	2026	2031
Core bulky goods	$43.67	$44.33	$45.45	$46.59	$47.77
Ancillary bulky goods	$58.36	$59.24	$60.73	$62.26	$63.84
Hardware	$16.57	$16.82	$17.24	$17.68	$18.13
Takeaway liquor	$22.96	$23.31	$23.90	$24.50	$25.12
Total Grocery & Specialty	***$420.03***	***$426.36***	***$437.13***	***$448.17***	***$459.48***
Total Bulky Goods	***$118.59***	***$120.38***	***$123.42***	***$126.54***	***$129.73***
Total	***$538.63***	***$546.75***	***$560.55***	***$574.71***	***$589.22***
Rothwell - Deception Bay					
Groceries & take home food	$188.95	$191.80	$196.65	$201.61	$206.70
Dining & take-away food (incl. on-premise liquor)	$83.15	$84.41	$86.54	$88.72	$90.96
Clothing, footwear & apparel	$54.03	$54.84	$56.23	$57.65	$59.10
Personal & other goods	$66.72	$67.72	$69.43	$71.19	$72.98
Core bulky goods	$42.51	$43.15	$44.24	$45.36	$46.51
Ancillary bulky goods	$56.57	$57.43	$58.88	$60.36	$61.89
Hardware	$16.31	$16.56	$16.98	$17.41	$17.85
Takeaway liquor	$22.92	$23.27	$23.85	$24.46	$25.07
Total Grocery & Specialty	***$415.78***	***$422.04***	***$432.70***	***$443.63***	***$454.83***
Total Bulky Goods	***$115.40***	***$117.14***	***$120.10***	***$123.13***	***$126.24***
Total	***$531.18***	***$539.18***	***$552.80***	***$566.76***	***$581.07***
Strathpine					
Groceries & take home food	$189.61	$192.47	$197.33	$202.31	$207.42
Dining & take-away food (incl. on-premise liquor)	$90.39	$91.76	$94.07	$96.45	$98.89
Clothing, footwear & apparel	$60.77	$61.69	$63.25	$64.84	$66.48
Personal & other goods	$73.73	$74.84	$76.73	$78.67	$80.66
Core bulky goods	$48.45	$49.19	$50.43	$51.70	$53.01
Ancillary bulky goods	$65.73	$66.73	$68.41	$70.14	$71.91
Hardware	$17.63	$17.89	$18.34	$18.81	$19.28
Takeaway liquor	$23.13	$23.48	$24.07	$24.68	$25.30
Total Grocery & Specialty	***$437.64***	***$444.24***	***$455.46***	***$466.96***	***$478.75***
Total Bulky Goods	***$131.82***	***$133.80***	***$137.18***	***$140.65***	***$144.20***
Total	***$569.46***	***$578.04***	***$592.64***	***$607.61***	***$622.95***

Source: Derived from ABS (2011a), Australian Bureau of Statistics (2011b) and the 2011 Census of Population & Housing.

Table B.2: Annual available retail expenditure within the trade areas, 2012-2031 ($M) (2011 dollars)

	2012	2016	2021	2026	2031
Albany Creek					
Groceries & take home food	$100.00	$107.45	$118.87	$128.23	$138.02
Dining & take-away food (incl. on-premise liquor)	$52.51	$56.42	$62.42	$67.33	$72.47
Clothing, footwear & apparel	$31.84	$34.21	$37.85	$40.83	$43.94
Personal & other goods	$42.68	$45.86	$50.73	$54.73	$58.91
Core bulky goods	$26.29	$28.25	$31.25	$33.71	$36.28
Ancillary bulky goods	$35.28	$37.91	$41.94	$45.24	$48.70
Hardware	$10.20	$10.96	$12.13	$13.08	$14.08
Takeaway liquor	$12.11	$13.01	$14.39	$15.53	$16.71
Total Grocery & Specialty	***$239.13***	***$256.96***	***$284.27***	***$306.64***	***$330.06***
Total Bulky Goods	***$71.77***	***$77.12***	***$85.32***	***$92.03***	***$99.06***
Total	***$310.90***	***$334.08***	***$369.59***	***$398.68***	***$429.12***
Bribie Island					
Groceries & take home food	$97.76	$103.57	$109.51	$112.28	$115.12
Dining & take-away food (incl. on-premise liquor)	$41.67	$44.14	$46.67	$47.85	$49.06
Clothing, footwear & apparel	$26.67	$28.26	$29.88	$30.64	$31.41

	2012	2016	2021	2026	2031
Personal & other goods	$33.20	$35.17	$37.19	$38.13	$39.09
Core bulky goods	$20.86	$22.10	$23.37	$23.96	$24.57
Ancillary bulky goods	$27.52	$29.16	$30.83	$31.61	$32.41
Hardware	$8.20	$8.68	$9.18	$9.41	$9.65
Takeaway liquor	$11.83	$12.54	$13.26	$13.59	$13.93
Total Grocery & Specialty	***$211.13***	***$223.68***	***$236.51***	***$242.49***	***$248.61***
Total Bulky Goods	***$56.58***	***$59.94***	***$63.38***	***$64.98***	***$66.62***
Total	***$267.71***	***$283.62***	***$299.90***	***$307.47***	***$315.23***
Burpengary - Narangba					
Groceries & take home food	$93.35	$102.51	$125.41	$158.60	$196.18
Dining & take-away food (incl. on-premise liquor)	$45.54	$50.01	$61.18	$77.38	$95.71
Clothing, footwear & apparel	$30.90	$33.93	$41.51	$52.50	$64.94
Personal & other goods	$37.31	$40.97	$50.13	$63.39	$78.41
Core bulky goods	$24.72	$27.14	$33.21	$42.00	$51.95
Ancillary bulky goods	$33.70	$37.01	$45.28	$57.26	$70.82
Hardware	$8.86	$9.73	$11.91	$15.06	$18.63
Takeaway liquor	$11.41	$12.53	$15.33	$19.38	$23.97
Total Grocery & Specialty	***$218.50***	***$239.94***	***$293.56***	***$371.25***	***$459.21***
Total Bulky Goods	***$67.28***	***$73.89***	***$90.40***	***$114.32***	***$141.41***
Total	***$285.78***	***$313.83***	***$383.96***	***$485.58***	***$600.61***
Caboolture East					
Groceries & take home food	$69.19	$72.48	$76.82	$79.05	$81.28
Dining & take-away food (incl. on-premise liquor)	$30.16	$31.60	$33.49	$34.46	$35.43
Clothing, footwear & apparel	$19.51	$20.44	$21.66	$22.29	$22.92
Personal & other goods	$24.15	$25.30	$26.81	$27.59	$28.37
Core bulky goods	$15.33	$16.06	$17.02	$17.51	$18.01
Ancillary bulky goods	$20.34	$21.31	$22.59	$23.24	$23.90
Hardware	$5.92	$6.20	$6.58	$6.77	$6.96
Takeaway liquor	$8.39	$8.79	$9.31	$9.58	$9.85
Total Grocery & Specialty	***$151.40***	***$158.61***	***$168.10***	***$172.98***	***$177.87***
Total Bulky Goods	***$41.59***	***$43.57***	***$46.18***	***$47.52***	***$48.86***
Total	***$192.99***	***$202.18***	***$214.28***	***$220.50***	***$226.73***
Caboolture Hinterland					
Groceries & take home food	$32.16	$37.34	$43.40	$49.03	$56.35
Dining & take-away food (incl. on-premise liquor)	$14.63	$16.99	$19.75	$22.31	$25.64
Clothing, footwear & apparel	$9.65	$11.21	$13.02	$14.71	$16.91
Personal & other goods	$11.82	$13.73	$15.96	$18.03	$20.72
Core bulky goods	$7.64	$8.87	$10.31	$11.64	$13.38
Ancillary bulky goods	$10.25	$11.90	$13.83	$15.63	$17.96
Hardware	$2.86	$3.33	$3.86	$4.37	$5.02
Takeaway liquor	$3.91	$4.54	$5.28	$5.96	$6.85
Total Grocery & Specialty	***$72.17***	***$83.82***	***$97.40***	***$110.04***	***$126.47***
Total Bulky Goods	***$20.75***	***$24.10***	***$28.00***	***$31.63***	***$36.36***
Total	***$92.92***	***$107.91***	***$125.40***	***$141.67***	***$162.82***
Caboolture Midwest					
Groceries & take home food	$54.39	$61.15	$70.63	$79.64	$89.24
Dining & take-away food (incl. on-premise liquor)	$26.54	$29.83	$34.46	$38.86	$43.54
Clothing, footwear & apparel	$18.00	$20.24	$23.38	$26.36	$29.54
Personal & other goods	$21.74	$24.44	$28.23	$31.84	$35.67
Core bulky goods	$14.40	$16.20	$18.71	$21.09	$23.64
Ancillary bulky goods	$19.64	$22.08	$25.50	$28.76	$32.22
Hardware	$5.17	$5.81	$6.71	$7.56	$8.48
Takeaway liquor	$6.65	$7.47	$8.63	$9.73	$10.91
Total Grocery & Specialty	***$127.31***	***$143.14***	***$165.34***	***$186.43***	***$208.91***
Total Bulky Goods	***$39.21***	***$44.08***	***$50.92***	***$57.41***	***$64.34***

	2012	2016	2021	2026	2031
Total	***$166.52***	***$187.22***	***$216.26***	***$243.84***	***$273.24***
Caboolture Morayfield					
Groceries & take home food	$205.13	$249.08	$285.72	$311.18	$355.24
Dining & take-away food (incl. on-premise liquor)	$90.47	$109.85	$126.01	$137.24	$156.67
Clothing, footwear & apparel	$58.84	$71.45	$81.96	$89.26	$101.90
Personal & other goods	$72.62	$88.18	$101.15	$110.17	$125.77
Core bulky goods	$46.32	$56.24	$64.51	$70.26	$80.21
Ancillary bulky goods	$61.67	$74.88	$85.90	$93.55	$106.80
Hardware	$17.75	$21.55	$24.72	$26.92	$30.73
Takeaway liquor	$24.89	$30.22	$34.67	$37.75	$43.10
Total Grocery & Specialty	***$451.95***	***$548.79***	***$629.51***	***$685.61***	***$782.69***
Total Bulky Goods	***$125.73***	***$152.67***	***$175.13***	***$190.74***	***$217.75***
Total	***$577.68***	***$701.46***	***$804.64***	***$876.35***	***$1,000.43***
Central Pine West					
Groceries & take home food	$93.59	$109.80	$130.54	$151.50	$167.43
Dining & take-away food (incl. on-premise liquor)	$48.52	$56.92	$67.67	$78.54	$86.80
Clothing, footwear & apparel	$30.08	$35.29	$41.96	$48.69	$53.81
Personal & other goods	$39.50	$46.34	$55.10	$63.94	$70.67
Core bulky goods	$24.69	$28.96	$34.43	$39.96	$44.16
Ancillary bulky goods	$33.24	$39.00	$46.37	$53.81	$59.47
Hardware	$9.43	$11.06	$13.15	$15.26	$16.87
Takeaway liquor	$11.35	$13.32	$15.84	$18.38	$20.31
Total Grocery & Specialty	***$223.05***	***$261.67***	***$311.10***	***$361.05***	***$399.03***
Total Bulky Goods	***$67.36***	***$79.02***	***$93.95***	***$109.03***	***$120.50***
Total	***$290.41***	***$340.69***	***$405.05***	***$470.08***	***$519.54***
Dakabin-Kallangur-Murrumba Downs					
Groceries & take home food	$121.49	$143.66	$167.15	$180.55	$186.86
Dining & take-away food (incl. on-premise liquor)	$57.08	$67.49	$78.53	$84.82	$87.79
Clothing, footwear & apparel	$38.14	$45.11	$52.48	$56.69	$58.67
Personal & other goods	$46.42	$54.89	$63.87	$68.99	$71.40
Core bulky goods	$30.34	$35.88	$41.75	$45.10	$46.67
Ancillary bulky goods	$41.03	$48.52	$56.45	$60.98	$63.11
Hardware	$11.14	$13.17	$15.33	$16.56	$17.14
Takeaway liquor	$14.80	$17.51	$20.37	$22.00	$22.77
Total Grocery & Specialty	***$277.93***	***$328.65***	***$382.39***	***$413.04***	***$427.49***
Total Bulky Goods	***$82.52***	***$97.58***	***$113.53***	***$122.63***	***$126.92***
Total	***$360.45***	***$426.23***	***$495.92***	***$535.67***	***$554.41***
Griffin-Mango Hill					
Groceries & take home food	$90.18	$129.26	$165.36	$205.90	$225.93
Dining & take-away food (incl. on-premise liquor)	$44.57	$63.88	$81.72	$101.76	$111.65
Clothing, footwear & apparel	$29.98	$42.97	$54.97	$68.45	$75.10
Personal & other goods	$36.52	$52.35	$66.97	$83.39	$91.50
Core bulky goods	$24.07	$34.51	$44.14	$54.97	$60.31
Ancillary bulky goods	$32.81	$47.03	$60.16	$74.91	$82.20
Hardware	$8.67	$12.43	$15.90	$19.80	$21.72
Takeaway liquor	$11.01	$15.79	$20.20	$25.15	$27.60
Total Grocery & Specialty	***$212.26***	***$304.26***	***$389.22***	***$484.65***	***$531.78***
Total Bulky Goods	***$65.55***	***$93.97***	***$120.21***	***$149.68***	***$164.23***
Total	***$277.82***	***$398.22***	***$509.43***	***$634.33***	***$696.02***
Hills District/Samford					
Groceries & take home food	$137.81	$148.54	$154.93	$161.94	$169.68
Dining & take-away food (incl. on-premise liquor)	$71.53	$77.10	$80.42	$84.06	$88.07
Clothing, footwear & apparel	$44.25	$47.70	$49.75	$52.00	$54.49
Personal & other goods	$58.23	$62.77	$65.46	$68.43	$71.70

	2012	2016	2021	2026	2031
Core bulky goods	$36.34	$39.17	$40.85	$42.70	$44.74
Ancillary bulky goods	$48.92	$52.73	$54.99	$57.48	$60.23
Hardware	$13.90	$14.99	$15.63	$16.34	$17.12
Takeaway liquor	$16.72	$18.02	$18.79	$19.64	$20.58
Total Grocery & Specialty	***$328.53***	***$354.13***	***$369.35***	***$386.06***	***$404.52***
Total Bulky Goods	***$99.15***	***$106.88***	***$111.47***	***$116.52***	***$122.09***
Total	***$427.69***	***$461.00***	***$480.82***	***$502.58***	***$526.60***
Lawnton - Bray Park					
Groceries & take home food	$60.11	$64.95	$69.12	$72.51	$77.57
Dining & take-away food (incl. on-premise liquor)	$28.29	$30.56	$32.53	$34.12	$36.50
Clothing, footwear & apparel	$18.92	$20.44	$21.75	$22.82	$24.41
Personal & other goods	$23.01	$24.86	$26.46	$27.76	$29.70
Core bulky goods	$15.05	$16.26	$17.31	$18.16	$19.42
Ancillary bulky goods	$20.36	$22.00	$23.41	$24.56	$26.27
Hardware	$5.52	$5.97	$6.35	$6.66	$7.12
Takeaway liquor	$7.33	$7.92	$8.42	$8.84	$9.45
Total Grocery & Specialty	***$137.66***	***$148.73***	***$158.28***	***$166.04***	***$177.63***
Total Bulky Goods	***$40.94***	***$44.23***	***$47.07***	***$49.37***	***$52.82***
Total	***$178.59***	***$192.95***	***$205.35***	***$215.41***	***$230.46***
Petrie/Dayboro					
Groceries & take home food	$68.68	$73.41	$79.52	$83.77	$86.53
Dining & take-away food (incl. on-premise liquor)	$34.33	$36.69	$39.74	$41.86	$43.25
Clothing, footwear & apparel	$22.66	$24.22	$26.23	$27.63	$28.54
Personal & other goods	$28.09	$30.02	$32.52	$34.26	$35.39
Core bulky goods	$18.28	$19.54	$21.17	$22.30	$23.04
Ancillary bulky goods	$24.85	$26.56	$28.77	$30.31	$31.31
Hardware	$6.68	$7.14	$7.73	$8.14	$8.41
Takeaway liquor	$8.38	$8.95	$9.70	$10.22	$10.55
Total Grocery & Specialty	***$162.13***	***$173.30***	***$187.70***	***$197.73***	***$204.26***
Total Bulky Goods	***$49.81***	***$53.24***	***$57.67***	***$60.75***	***$62.76***
Total	***$211.94***	***$226.54***	***$245.38***	***$258.49***	***$267.02***
Redcliffe					
Groceries & take home food	$230.06	$242.69	$261.24	$278.62	$294.21
Dining & take-away food (incl. on-premise liquor)	$102.89	$108.54	$116.83	$124.61	$131.58
Clothing, footwear & apparel	$67.33	$71.03	$76.46	$81.55	$86.11
Personal & other goods	$82.84	$87.39	$94.06	$100.32	$105.94
Core bulky goods	$53.13	$56.05	$60.33	$64.35	$67.95
Ancillary bulky goods	$71.00	$74.90	$80.63	$85.99	$90.80
Hardware	$20.16	$21.27	$22.89	$24.42	$25.78
Takeaway liquor	$27.94	$29.47	$31.73	$33.84	$35.73
Total Grocery & Specialty	***$511.05***	***$539.12***	***$580.32***	***$618.93***	***$653.56***
Total Bulky Goods	***$144.29***	***$152.22***	***$163.85***	***$174.75***	***$184.53***
Total	***$655.34***	***$691.34***	***$744.18***	***$793.69***	***$838.09***
Rothwell - Deception Bay					
Groceries & take home food	$117.63	$132.52	$145.80	$153.18	$161.31
Dining & take-away food (incl. on-premise liquor)	$51.77	$58.32	$64.16	$67.41	$70.99
Clothing, footwear & apparel	$33.64	$37.89	$41.69	$43.80	$46.12
Personal & other goods	$41.54	$46.79	$51.48	$54.09	$56.96
Core bulky goods	$26.47	$29.82	$32.80	$34.46	$36.29
Ancillary bulky goods	$35.22	$39.68	$43.65	$45.86	$48.30
Hardware	$10.16	$11.44	$12.59	$13.23	$13.93
Takeaway liquor	$14.27	$16.08	$17.69	$18.58	$19.57
Total Grocery & Specialty	***$258.84***	***$291.61***	***$320.82***	***$337.05***	***$354.95***
Total Bulky Goods	***$71.84***	***$80.94***	***$89.05***	***$93.55***	***$98.52***
Total	***$330.68***	***$372.54***	***$409.87***	***$430.60***	***$453.46***

	2012	2016	2021	2026	2031
Strathpine					
Groceries & take home food	$75.74	$83.16	$91.25	$97.46	$101.47
Dining & take-away food (incl. on-premise liquor)	$36.11	$39.65	$43.50	$46.46	$48.38
Clothing, footwear & apparel	$24.27	$26.65	$29.25	$31.24	$32.52
Personal & other goods	$29.45	$32.34	$35.48	$37.90	$39.46
Core bulky goods	$19.35	$21.25	$23.32	$24.90	$25.93
Ancillary bulky goods	$26.26	$28.83	$31.63	$33.79	$35.18
Hardware	$7.04	$7.73	$8.48	$9.06	$9.43
Takeaway liquor	$9.24	$10.14	$11.13	$11.89	$12.38
Total Grocery & Specialty	***$174.81***	***$191.94***	***$210.61***	***$224.94***	***$234.21***
Total Bulky Goods	***$52.65***	***$57.81***	***$63.43***	***$67.75***	***$70.54***
Total	***$227.46***	***$249.75***	***$274.04***	***$292.68***	***$304.75***
Total					
Groceries & take home food	$1,647.26	$1,861.58	$2,095.27	$2,303.42	$2,502.42
Dining & take-away food (incl. on-premise liquor)	$776.57	$878.00	$989.09	$1,089.06	$1,183.53
Clothing, footwear & apparel	$504.69	$571.04	$643.80	$709.45	$771.35
Personal & other goods	$629.12	$711.41	$801.61	$882.93	$959.64
Core bulky goods	$403.29	$456.30	$514.49	$567.08	$616.56
Ancillary bulky goods	$542.09	$613.49	$691.94	$762.97	$829.68
Hardware	$151.66	$171.46	$193.14	$212.64	$231.07
Takeaway liquor	$200.22	$226.29	$254.72	$280.06	$304.28
Total Grocery & Specialty	***$3,757.86***	***$4,248.32***	***$4,784.49***	***$5,264.93***	***$5,721.23***
Total Bulky Goods	***$1,097.04***	***$1,241.26***	***$1,399.56***	***$1,542.69***	***$1,677.31***
Total	***$4,854.90***	***$5,489.57***	***$6,184.06***	***$6,807.61***	***$7,398.54***

Source: Derived from Table 6.1 and Table B.1

APPENDIX C

SUPPORTABLE FLOOR SPACE

Table C.1: Supportable Floor Space generated within Retail Catchments, 2012-2031 (sqm)

	2012	2016	2021	2026	2031
Albany Creek					
Groceries & take home food	10,588	11,378	12,587	13,577	14,614
Dining & take-away food (incl. on-premise liquor)	7,351	7,899	8,739	9,426	10,146
Clothing, footwear & apparel	4,245	4,561	5,046	5,443	5,859
Personal & other goods	6,639	7,134	7,892	8,513	9,163
Core bulky goods	4,507	4,843	5,357	5,779	6,220
Ancillary bulky goods	5,292	5,687	6,291	6,786	7,304
Hardware	2,857	3,070	3,396	3,663	3,943
Takeaway liquor	1,715	1,843	2,039	2,200	2,368
Total Grocery & Specialty	***30,538***	***32,815***	***36,303***	***39,160***	***42,150***
Total Bulky Goods	***12,655***	***13,599***	***15,044***	***16,228***	***17,467***
Total	***43,194***	***46,414***	***51,347***	***55,388***	***59,618***
Bribie Island					
Groceries & take home food	11,214	11,880	12,562	12,879	13,204
Dining & take-away food (incl. on-premise liquor)	7,708	8,166	8,635	8,853	9,076
Clothing, footwear & apparel	5,335	5,652	5,976	6,127	6,282
Personal & other goods	6,824	7,229	7,644	7,837	8,035
Core bulky goods	5,365	5,684	6,010	6,162	6,318
Ancillary bulky goods	6,192	6,560	6,936	7,112	7,291
Hardware	3,033	3,213	3,397	3,483	3,571
Takeaway liquor	1,923	2,037	2,154	2,209	2,264
Total Grocery & Specialty	***33,004***	***34,964***	***36,971***	***37,905***	***38,862***
Total Bulky Goods	***14,590***	***15,457***	***16,344***	***16,756***	***17,179***
Total	***47,593***	***50,421***	***53,315***	***54,661***	***56,041***
Burpengary - Narangba					
Groceries & take home food	10,433	11,457	14,017	17,726	21,926
Dining & take-away food (incl. on-premise liquor)	8,197	9,001	11,013	13,928	17,227
Clothing, footwear & apparel	5,836	6,409	7,841	9,916	12,266
Personal & other goods	7,462	8,194	10,025	12,679	15,682
Core bulky goods	6,003	6,592	8,065	10,200	12,617
Ancillary bulky goods	7,161	7,864	9,621	12,168	15,050
Hardware	3,191	3,505	4,288	5,422	6,707
Takeaway liquor	1,806	1,983	2,426	3,069	3,796
Total Grocery & Specialty	***33,734***	***37,044***	***45,323***	***57,318***	***70,897***
Total Bulky Goods	***16,356***	***17,961***	***21,974***	***27,790***	***34,374***
Total	***50,089***	***55,005***	***67,297***	***85,108***	***105,270***
Caboolture East					
Groceries & take home food	7,937	8,314	8,812	9,068	9,324
Dining & take-away food (incl. on-premise liquor)	5,580	5,845	6,195	6,375	6,555
Clothing, footwear & apparel	3,902	4,088	4,333	4,459	4,585
Personal & other goods	4,964	5,200	5,512	5,672	5,832
Core bulky goods	3,941	4,129	4,376	4,503	4,630
Ancillary bulky goods	4,577	4,795	5,082	5,230	5,377
Hardware	2,191	2,295	2,433	2,503	2,574
Takeaway liquor	1,363	1,428	1,513	1,557	1,601
Total Grocery & Specialty	***23,746***	***24,876***	***26,365***	***27,130***	***27,897***
Total Bulky Goods	***10,710***	***11,220***	***11,891***	***12,236***	***12,582***
Total	***34,456***	***36,096***	***38,256***	***39,366***	***40,478***
Caboolture Hinterland					
Groceries & take home food	3,689	4,284	4,978	5,624	6,463
Dining & take-away food (incl. on-premise liquor)	2,707	3,144	3,653	4,127	4,744
Clothing, footwear & apparel	1,930	2,241	2,604	2,942	3,382
Personal & other goods	2,430	2,823	3,280	3,706	4,259

	2012	2016	2021	2026	2031
Core bulky goods	1,964	2,280	2,650	2,994	3,441
Ancillary bulky goods	2,306	2,678	3,112	3,516	4,041
Hardware	1,059	1,230	1,430	1,615	1,856
Takeaway liquor	635	738	857	969	1,113
Total Grocery & Specialty	***11,391***	***13,229***	***15,373***	***17,368***	***19,961***
Total Bulky Goods	***5,329***	***6,189***	***7,192***	***8,125***	***9,338***
Total	***16,720***	***19,418***	***22,565***	***25,493***	***29,299***
Caboolture Midwest					
Groceries & take home food	6,238	7,014	8,102	9,135	10,236
Dining & take-away food (incl. on-premise liquor)	4,909	5,519	6,375	7,189	8,055
Clothing, footwear & apparel	3,601	4,049	4,677	5,273	5,909
Personal & other goods	4,469	5,024	5,804	6,544	7,333
Core bulky goods	3,704	4,164	4,810	5,424	6,078
Ancillary bulky goods	4,419	4,968	5,738	6,470	7,250
Hardware	1,911	2,149	2,482	2,799	3,136
Takeaway liquor	1,080	1,214	1,403	1,581	1,772
Total Grocery & Specialty	***20,297***	***22,820***	***26,360***	***29,722***	***33,305***
Total Bulky Goods	***10,034***	***11,281***	***13,031***	***14,693***	***16,464***
Total	***30,331***	***34,102***	***39,391***	***44,415***	***49,770***
Caboolture Morayfield					
Groceries & take home food	23,530	28,571	32,774	35,694	40,749
Dining & take-away food (incl. on-premise liquor)	16,737	20,323	23,312	25,390	28,985
Clothing, footwear & apparel	11,768	14,290	16,392	17,852	20,380
Personal & other goods	14,928	18,126	20,793	22,646	25,852
Core bulky goods	11,910	14,462	16,589	18,068	20,626
Ancillary bulky goods	13,876	16,849	19,327	21,050	24,030
Hardware	6,566	7,973	9,146	9,961	11,372
Takeaway liquor	4,044	4,911	5,633	6,135	7,004
Total Grocery & Specialty	***71,007***	***86,221***	***98,904***	***107,718***	***122,969***
Total Bulky Goods	***32,352***	***39,284***	***45,063***	***49,079***	***56,028***
Total	***103,359***	***125,505***	***143,967***	***156,796***	***178,997***
Central Pine West					
Groceries & take home food	10,736	12,594	14,973	17,377	19,206
Dining & take-away food (incl. on-premise liquor)	8,976	10,530	12,519	14,529	16,058
Clothing, footwear & apparel	6,016	7,058	8,391	9,738	10,763
Personal & other goods	8,120	9,526	11,326	13,144	14,527
Core bulky goods	6,348	7,447	8,854	10,275	11,356
Ancillary bulky goods	7,480	8,775	10,432	12,107	13,381
Hardware	3,489	4,093	4,867	5,648	6,242
Takeaway liquor	1,845	2,164	2,573	2,987	3,301
Total Grocery & Specialty	***35,693***	***41,873***	***49,783***	***57,776***	***63,855***
Total Bulky Goods	***17,317***	***20,315***	***24,152***	***28,030***	***30,979***
Total	***53,010***	***62,187***	***73,936***	***85,806***	***94,834***
Dakabin-Kallangur-Murrumba Downs					
Groceries & take home food	13,221	15,633	18,190	19,648	20,335
Dining & take-away food (incl. on-premise liquor)	9,703	11,473	13,350	14,420	14,924
Clothing, footwear & apparel	6,781	8,019	9,330	10,078	10,430
Personal & other goods	8,768	10,368	12,063	13,031	13,486
Core bulky goods	6,936	8,201	9,543	10,307	10,668
Ancillary bulky goods	8,206	9,704	11,291	12,196	12,622
Hardware	3,788	4,479	5,212	5,630	5,827
Takeaway liquor	2,282	2,699	3,140	3,392	3,511
Total Grocery & Specialty	***40,756***	***48,193***	***56,073***	***60,568***	***62,687***
Total Bulky Goods	***18,930***	***22,385***	***26,045***	***28,133***	***29,117***
Total	***59,686***	***70,577***	***82,118***	***88,701***	***91,803***

	2012	2016	2021	2026	2031
Griffin-Mango Hill					
Groceries & take home food	10,079	14,447	18,481	23,013	25,251
Dining & take-away food (incl. on-premise liquor)	8,022	11,499	14,710	18,317	20,098
Clothing, footwear & apparel	5,663	8,117	10,383	12,929	14,186
Personal & other goods	7,305	10,470	13,394	16,678	18,300
Core bulky goods	5,847	8,380	10,721	13,349	14,647
Ancillary bulky goods	6,972	9,994	12,785	15,919	17,468
Hardware	3,121	4,474	5,724	7,127	7,820
Takeaway liquor	1,744	2,500	3,198	3,982	4,369
Total Grocery & Specialty	***32,812***	***47,033***	***60,167***	***74,919***	***82,204***
Total Bulky Goods	***15,940***	***22,849***	***29,229***	***36,396***	***39,935***
Total	***48,752***	***69,881***	***89,396***	***111,314***	***122,139***
Hills District/Samford					
Groceries & take home food	14,591	15,728	16,404	17,146	17,966
Dining & take-away food (incl. on-premise liquor)	10,014	10,794	11,258	11,768	12,330
Clothing, footwear & apparel	5,900	6,360	6,633	6,933	7,265
Personal & other goods	9,058	9,764	10,183	10,644	11,153
Core bulky goods	6,229	6,714	7,003	7,320	7,670
Ancillary bulky goods	7,337	7,909	8,249	8,622	9,034
Hardware	3,893	4,196	4,376	4,574	4,793
Takeaway liquor	2,368	2,552	2,662	2,783	2,916
Total Grocery & Specialty	***41,932***	***45,198***	***47,141***	***49,274***	***51,629***
Total Bulky Goods	***17,459***	***18,819***	***19,628***	***20,516***	***21,497***
Total	***59,391***	***64,017***	***66,769***	***69,790***	***73,126***
Lawnton - Bray Park					
Groceries & take home food	6,719	7,259	7,725	8,104	8,670
Dining & take-away food (incl. on-premise liquor)	5,092	5,501	5,855	6,141	6,570
Clothing, footwear & apparel	3,573	3,861	4,109	4,310	4,611
Personal & other goods	4,603	4,973	5,292	5,551	5,939
Core bulky goods	3,656	3,950	4,203	4,409	4,717
Ancillary bulky goods	4,327	4,675	4,975	5,219	5,583
Hardware	1,988	2,147	2,285	2,397	2,565
Takeaway liquor	1,160	1,253	1,334	1,399	1,497
Total Grocery & Specialty	***21,146***	***22,847***	***24,315***	***25,505***	***27,287***
Total Bulky Goods	***9,970***	***10,772***	***11,464***	***12,025***	***12,865***
Total	***31,117***	***33,618***	***35,778***	***37,531***	***40,153***
Petrie/Dayboro					
Groceries & take home food	7,878	8,421	9,121	9,608	9,925
Dining & take-away food (incl. on-premise liquor)	6,350	6,788	7,352	7,745	8,001
Clothing, footwear & apparel	4,531	4,844	5,246	5,527	5,709
Personal & other goods	5,773	6,171	6,684	7,041	7,274
Core bulky goods	4,702	5,026	5,443	5,734	5,923
Ancillary bulky goods	5,592	5,977	6,474	6,820	7,045
Hardware	2,470	2,640	2,860	3,013	3,112
Takeaway liquor	1,361	1,455	1,576	1,660	1,715
Total Grocery & Specialty	***25,894***	***27,678***	***29,979***	***31,581***	***32,623***
Total Bulky Goods	***12,764***	***13,643***	***14,777***	***15,567***	***16,080***
Total	***38,658***	***41,321***	***44,757***	***47,148***	***48,704***
Redcliffe					
Groceries & take home food	25,712	27,124	29,197	31,140	32,882
Dining & take-away food (incl. on-premise liquor)	18,520	19,537	21,030	22,429	23,684
Clothing, footwear & apparel	12,719	13,417	14,443	15,404	16,265
Personal & other goods	16,567	17,477	18,813	20,065	21,187
Core bulky goods	12,904	13,612	14,653	15,627	16,502

	2012	2016	2021	2026	2031
Ancillary bulky goods	15,088	15,916	17,133	18,273	19,295
Hardware	7,258	7,656	8,242	8,790	9,282
Takeaway liquor	4,424	4,667	5,023	5,357	5,657
Total Grocery & Specialty	***77,941***	***82,222***	***88,506***	***94,394***	***99,676***
Total Bulky Goods	***35,249***	***37,185***	***40,027***	***42,690***	***45,078***
Total	***113,190***	***119,407***	***128,533***	***137,085***	***144,754***
Rothwell - Deception Bay					
Groceries & take home food	13,147	14,812	16,296	17,120	18,029
Dining & take-away food (incl. on-premise liquor)	9,318	10,498	11,549	12,133	12,778
Clothing, footwear & apparel	6,353	7,158	7,875	8,273	8,712
Personal & other goods	8,307	9,359	10,296	10,817	11,391
Core bulky goods	6,428	7,241	7,967	8,370	8,814
Ancillary bulky goods	7,484	8,432	9,276	9,745	10,263
Hardware	3,656	4,119	4,532	4,761	5,014
Takeaway liquor	2,259	2,545	2,800	2,942	3,098
Total Grocery & Specialty	***39,385***	***44,371***	***48,817***	***51,285***	***54,008***
Total Bulky Goods	***17,568***	***19,792***	***21,775***	***22,876***	***24,091***
Total	***56,953***	***64,163***	***70,592***	***74,161***	***78,099***
Strathpine					
Groceries & take home food	8,242	9,050	9,930	10,605	11,043
Dining & take-away food (incl. on-premise liquor)	6,138	6,740	7,395	7,898	8,224
Clothing, footwear & apparel	4,316	4,738	5,199	5,553	5,782
Personal & other goods	5,563	6,108	6,702	7,158	7,453
Core bulky goods	4,424	4,857	5,330	5,692	5,927
Ancillary bulky goods	5,251	5,766	6,327	6,757	7,036
Hardware	2,394	2,628	2,884	3,080	3,207
Takeaway liquor	1,424	1,564	1,716	1,833	1,908
Total Grocery & Specialty	***25,683***	***28,200***	***30,942***	***33,048***	***34,410***
Total Bulky Goods	***12,069***	***13,252***	***14,540***	***15,530***	***16,170***
Total	***37,752***	***41,452***	***45,483***	***48,577***	***50,580***
Total					
Groceries & take home food	183,952	207,965	234,148	257,465	279,822
Dining & take-away food (incl. on-premise liquor)	135,322	153,257	172,941	190,668	207,455
Clothing, footwear & apparel	92,470	104,861	118,478	130,758	142,386
Personal & other goods	121,780	137,947	155,704	171,725	186,867
Core bulky goods	94,865	107,584	121,574	134,214	146,154
Ancillary bulky goods	111,560	126,547	143,050	157,989	172,071
Hardware	52,866	59,869	67,553	74,467	81,020
Takeaway liquor	31,435	35,555	40,050	44,054	47,890
Total Grocery & Specialty	***564,959***	***639,585***	***721,321***	***794,670***	***864,420***
Total Bulky Goods	***259,291***	***294,000***	***332,177***	***366,670***	***399,245***
Total	***824,250***	***933,585***	***1,053,498***	***1,161,340***	***1,263,666***

Source: Derived from Table B.2 and Economic Associates estimates

APPENDIX D

DEVELOPMENT APPROVALS

Development Approvals

Between 2005 and 2013, there have been 93 development approvals within Moreton Bay RC including up to 117,246m^2 of retail floor space and up to 28,657m^2 of commercial floor space. The most significant catchments in terms of the number of approvals were:

- Caboolture – Morayfield: 41 approvals;
- Burpengary – Narangba: 12 approvals; and
- Bribie Island: 10 approvals.

Table D.1 below shows the development approvals within Moreton Bay Regional Council.

Table D.1: Development Approvals, Moreton Bay Regional Council, 2005-2013

Address	District	Retail Floor Space (m²)	Commercial Floor Space (m²)	Total GFA (m²)
Lot 4 Old Northern Road, Albany Creek	Albany Creek	84	840	924
703 & 705 Albany Creek Road, Albany Creek	Albany Creek	-	457	457
138-150 Goodwin Drive, Bongaree	Bribie Island	320		320
229-231 Goodwin Drive, Bongaree	Bribie Island	78	-	78
Lot 190 Marina Drive, Lot 183 Seaside Drive and Lot 205 Sunderland Drive, Banksia Beach	Bribie Island	2,000	-	2,000
12-40 Foley Street, Bongaree	Bribie Island	97	-	97
71 Dolphin Drive, Bongaree	Bribie Island	1,504	-	1,504
22 Ferguson Road, Bongaree	Bribie Island	-	10	10
1-5 Coolgarra Avenue, Bongaree	Bribie Island	400	-	400
4 Eucalypt Street, Bellara	Bribie Island	110	-	110
21 First Avenue, Bongaree	Bribie Island	-	65	65
37 Charlotte Avenue, Bongaree	Bribie Island	-	250	250
115-117 Buckley Road, Burpengary	Burpengary - Narangba	2,360	2,100	4,270
175, 177 & 181-183 Station Road, 11 & 15 North Shore Drive and Lot 10, 23-31 Progress Road, Burpengary	Burpengary - Narangba	7,706	-	7,706
Lot 10, 23-31 Progress Road, Burpengary	Burpengary - Narangba			
49 Progress Road, Burpengary	Burpengary - Narangba	-	425	425
157-159 Station Road, Burpengary	Burpengary - Narangba	-	610	610
20 North Shore Drive, Burpengary	Burpengary - Narangba	-	419	419
20 Young Road and 1 Marshman Road, Narangba	Burpengary - Narangba	-	258	258
238 Young Road, Narangba	Burpengary - Narangba	1,200		1,200
30 Main Street, Narangba	Burpengary - Narangba	-	56	56
27-33 Boundary Road, Narangba	Burpengary - Narangba	4,785	-	4,785
28 Main Street, Narangba	Burpengary - Narangba	400	300	700
49 Golden Wattle Drive, Narangba	Burpengary - Narangba	360	185	545
Lot 986 Pettigrew Street, Caboolture	Caboolture - Morayfield	4,000	-	4,000
21-25 Bertha Street, Caboolture	Caboolture - Morayfield	-	796	796
20 George Street, Caboolture	Caboolture - Morayfield	-	1,900	1,900
41 Kiara Close, Caboolture	Caboolture - Morayfield	-	307	307
6-12 Dickson Road, Morayfield	Caboolture - Morayfield	2,852	-	2,852
70-86 Michael Avenue, Caboolture South	Caboolture - Morayfield	2,866	-	2,866
343 Morayfield Rd, Morayfield	Caboolture - Morayfield	11,830	-	11,830
168-172 Morayfield Rd, Morayfield	Caboolture - Morayfield	3,261	-	3,261
1 Adrossan Road, Caboolture	Caboolture - Morayfield	3,790	-	3,790
15 Graham Road, Morayfield	Caboolture - Morayfield	491		491

Address	District	Retail Floor Space (m^2)	Commercial Floor Space (m^2)	Total GFA (m^2)
1 Church Street, Caboolture South	Caboolture - Morayfield	-	218	218
42, 44 & 42A Beerburrum Road, Caboolture	Caboolture - Morayfield	2,606	-	2,606
158-166 Morayfield Road, Morayfield	Caboolture - Morayfield	332	472	804
265 Morayfield Road, Morayfield	Caboolture - Morayfield	5,273	-	5,273
423-479 Pumicestone Road, Caboolture	Caboolture - Morayfield	1,022	622	1,644
Unit 5 64 William Berry Drive, Morayfield	Caboolture - Morayfield	-	234	234
42-68 Manley Street, Caboolture	Caboolture - Morayfield	-	654	654
Lot 11 King Street, Caboolture	Caboolture - Morayfield	-	2,399	2,399
Lot 972 Pettigrew Street, Caboolture	Caboolture - Morayfield	3,850	1,510	5,360
11-13 Bertha Street, Caboolture	Caboolture - Morayfield	-	1,500	1,500
10-20 Walkers Road, Morayfield	Caboolture - Morayfield		494	494
67-73 Morayfield Road, Caboolture South	Caboolture - Morayfield	374	251	625
171 and 177-189 Morayfield Road, Morayfield	Caboolture - Morayfield	347	-	347
78-80 William Berry Drive, Morayfield	Caboolture - Morayfield	840	-	840
46 Beerburrum Road, Caboolture	Caboolture - Morayfield	45	-	45
20 Beerburrum Road, Caboolture	Caboolture - Morayfield	413	-	413
92 Morayfield Road, Caboolture South	Caboolture - Morayfield	176	-	176
65-75 Bellmere Road, Bellmere	Caboolture - Morayfield	-	165	165
24 George Street, Caboolture	Caboolture - Morayfield	-	142	-
369 Morayfield Road, Morayfield	Caboolture - Morayfield	8,958	-	-
50 Beerburrum Road, Caboolture	Caboolture - Morayfield	243	-	243
22-28 Rowe Street, Caboolture	Caboolture - Morayfield	261	-	261
44-54 Pasturage Road, Caboolture	Caboolture - Morayfield	679	471	1,150
321 and 343 Morayfield Road and 29-33 Station Road, Morayfield	Caboolture - Morayfield	9,288	-	9,288
1-5 Oakey Flat Road, Morayfield	Caboolture - Morayfield	2,727	2,727	2,727
312-344 Morayfield Road, Morayfield	Caboolture - Morayfield	5,000	-	5,000
201-205 Morayfield Road, Morayfield	Caboolture - Morayfield	-	100	100
80-90 Morayfield Road and 6-8 Frank Street, Caboolture South	Caboolture - Morayfield	1,173	1,532	2,705
423-479 Pumicestone Road, Caboolture	Caboolture - Morayfield	4,000	1,100	5,100
4 Blue Gum Terrace, Caboolture South	Caboolture - Morayfield	-	154	154
17 Concorde Place, Caboolture	Caboolture - Morayfield	954	-	954
544Beachmere Road, Beachmere	Caboolture East	-	163	163
754-756 Bestmann Road, Ningi	Caboolture East	160	-	
2-10 James Road, Beachmere	Caboolture East	800	750	-
102-12 Archer Street, Woodford	Caboolture Hinterland	649	-	649
98 ArcherStreet, WOODFORD	Caboolture Hinterland	45	-	45
2011 D'Aguilar Highway, D'AGUILAR	Caboolture Hinterland	1,193	-	1,193

Address	District	Retail Floor Space (m^2)	Commercial Floor Space (m^2)	Total GFA (m^2)
1381-1387 Anzac Avenue, Kallangur	Dakabin - Kallangur - Murrumba Downs	366	-	366
6 Oxley Street, North Lakes	Griffin - Mango Hill	550	-	550
4-10 Burke Crescent and 5-7 Wills Street, North Lakes	Griffin - Mango Hill	7,270	300	7,770
18-20 Burke Crescent, North Lakes	Griffin - Mango Hill	1,680	-	1,680
Lot 74 Endeavour Boulevard, North Lakes	Griffin - Mango Hill	504	504	504
Lot 822 Ferny Way, Ferny Hills	Hills District / Samford	477	477	477
125 McKenzie Street, Dayboro	Petrie / Dayboro	-	51	51
564 Oxley Avenue, Scarborough	Redcliffe	-	196	196
6 Silvyn Street, Redcliffe	Redcliffe		1,000	
4 Oasis Court, Clontarf	Redcliffe	374	-	374
99 Anzac Avenue, Redcliffe	Redcliffe	-	55	55
11 Boardman Road, Kippa-Ring	Redcliffe	-	124	124
31 Ashmole Road, Redcliffe	Redcliffe	-	129	129
743-757 Deception Bay Road, Rothwell	Rothwell / Deception Bay	-	153	153
1-7 Mariner Boulevard, Deception Bay	Rothwell / Deception Bay	82	-	82
99-101 Esplanade, Deception Bay	Rothwell / Deception Bay		178	178
424-438 Deception Bay Road and Lot 7 Flegg Street, Deception Bay	Rothwell / Deception Bay	1,525	-	1,525
661-675 Deception Bay Road, Deception Bay	Rothwell / Deception Bay	-	250	250
1-45 Bay Avenue, Deception Bay	Rothwell / Deception Bay	1,075	-	1,075
25 Zammit Street, Deception Bay	Rothwell / Deception Bay	-	135	135
Lot 1 Gympie Road, Strathpine	Strathpine	1,441	-	1,441
518-520 Gympie Road, Strathpine	Strathpine	-	470	470

Source: Information provided by Moreton Bay Regional Council