APPENDIX K

Centres Hierarchy

Caboolture West Master Planned Area: Centres Hierarchy Options

Final Report

April 2013

ECONOMIC ASSOCIATES

Caboolture West Master Planned Area: Centres Hierarchy Options

Final Report

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April 2013

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1 INTRODUCTION

Caboolture West is recognised as a residential and employment identified growth area in the South East Queensland Regional Plan 2009-2031. On the 17 February 2012 Caboolture West was declared a Master Planned Area (MPA).

The Caboolture West Master Planned Area (MPA) could potentially house 60,000 persons at build out. This report assesses the likely need for retail and commercial floor space within the Caboolture West MPA over a thirty-five year horizon and provides a number potential centres network options, assuming a build out population of 60,000 persons for the MPA.

In assessing the future demands of Caboolture West, this report:

- Identifies the Caboolture West MPA catchment area(s);
- Outlines the demographic and socio-economic characteristics of Caboolture West MPA;
- Identifies the existing retail network;
- Provides an assessment of future retail floor space needs within the Caboolture West MPA, based on:
  - Estimated retail expenditure patterns of catchment area households by expenditure category;
  - Estimated anticipated retail expenditure retention of Caboolture West MPA;
  - Estimated supportable floor space of Caboolture West MPA;
- Provides an assessment of future commercial floor space demand within the Caboolture West MPA; and
- Provides four (4) indicative centres networks to meet the future retail and commercial floor space needs of the Caboolture West MPA.

The report also contains a preliminary assessment of community facility needs for the Caboolture West MPA. The purpose of the preliminary community needs assessment is to demonstrate the significant need for community facilities within the MPA at built out and highlight an opportunity to integrate or co-locate community facilities with retail and commercial activities to deliver 'true' activity centres.

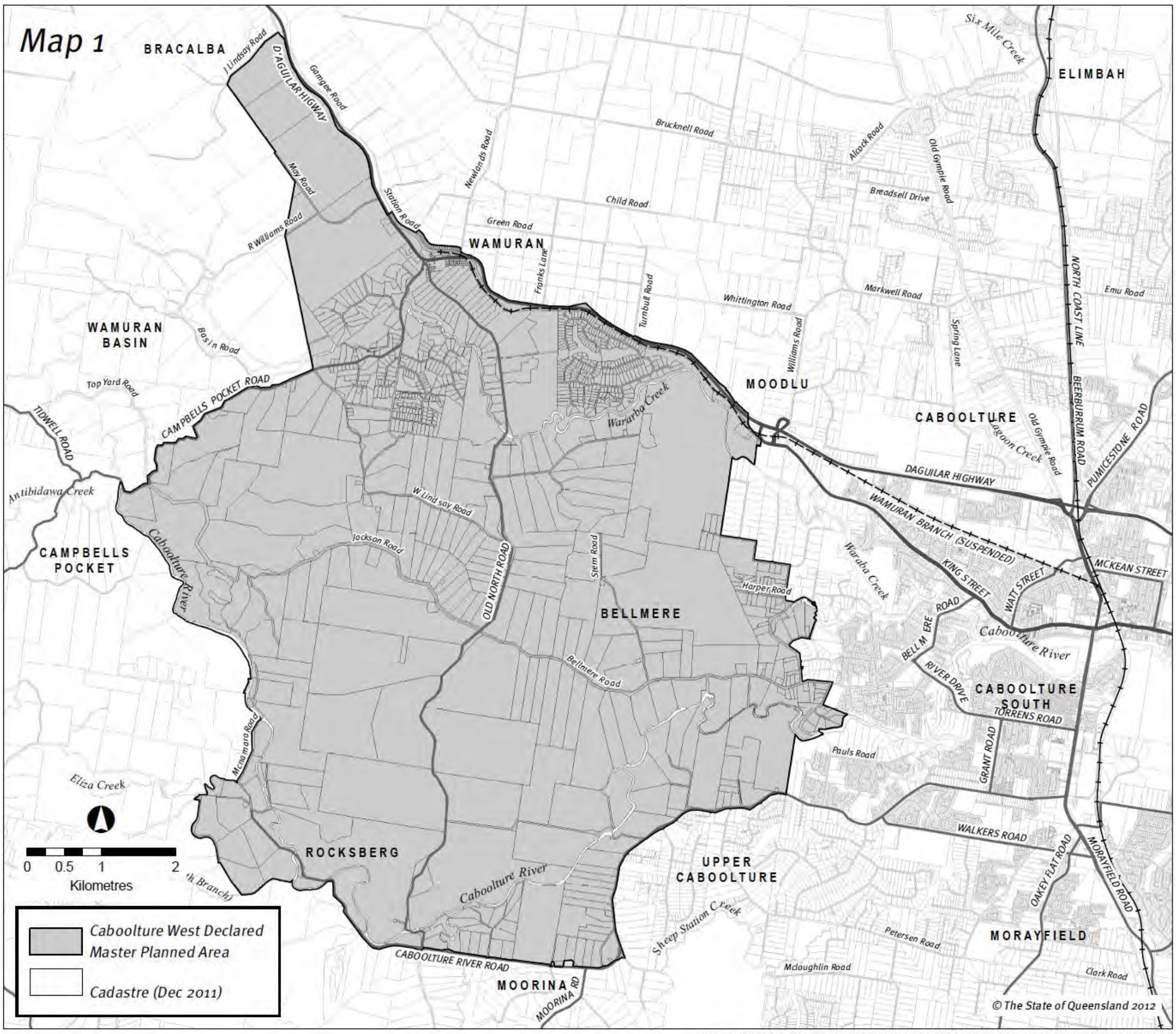
2 CABOOLTURE WEST MPA OVERVIEW

2.1 Caboolture West Master Planned Area

The Caboolture West Master Planned Area (MPA) covers approximately 6,000 hectares and is generally bound by the D'Aguilar Highway to the north, Campbells Pocket Road and Caboolture River to the west and Caboolture River Road to the south. The northern parts of the MPA abutting the D'Aguilar Highway have been partially developed for rural residential uses. These areas may take time to transition to urban residential due to fragmentation of tenure. The remainder of the MPA is largely used for rural purposes.

Figure 2.1 below shows the Caboolture West MPA.

Figure 2.1: Caboolture West MPA



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The Caboolture West MPA catchment area (Caboolture West catchment) (shown in Figure 2.2) generally reflects the Caboolture West MPA based on SA1 geographies (the finest standard geography). The Caboolture West MPA catchment area comprises following 2011 SA1 geographies[1]:

- 3136901;
- 3136902;
- 3136903;
- 3136904;
- 3136905;
- 3136906;
- 3136907;
- 3137603;
- 3137605; and
- 3137609.

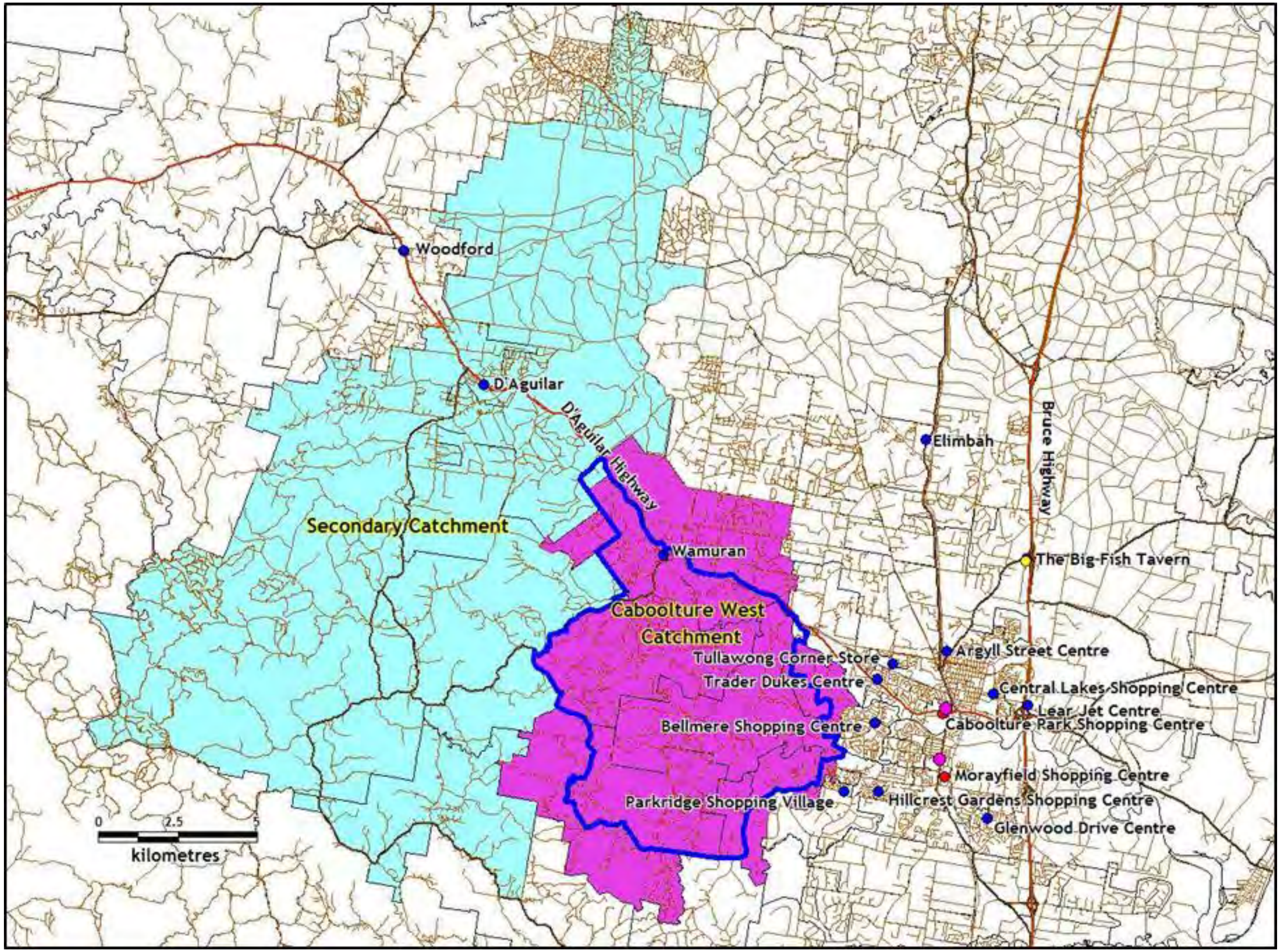
Significant volumes of traffic are expected to move through the Caboolture West catchment along the D'Aguilar Highway and future arterial roads with the east bound gravity towards Caboolture, Morayfield and the Bruce Highway. Some of this traffic is likely to come from a secondary catchment identified to the north and west of the Caboolture West catchment.

The secondary catchment is geographically large because a number of SA1 boundaries are sparsely populated.

Figure 2.2 below shows the trade areas for the proposed centre and the location of existing retail centres.

[1] As of the 2011 Census, collection district boundaries were no longer available and have been replaced by SA1 boundaries.

Figure 2.2: Caboolture West and secondary catchments and existing retail network



2.2 Socio-Economic Overview

A socio-economic profile of the Caboolture West catchment 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 the Caboolture West catchment was 3,988 persons as at the 2011 Census, accounting for less than 1% of the Moreton Bay RC population. The population of the secondary catchment was 3,071 persons in 2011, also accounting for less than 1% of the Moreton Bay RC population;
- The average age of residents in the Caboolture West and secondary catchments of around 38 years is similar to the broader regional and state average age;
- The Caboolture West catchment and secondary catchment recorded a similar average age of residents to Moreton Bay RC, SEQ and Queensland. A higher proportion of residents was aged 45 to 64 years in the Caboolture West catchment and secondary catchment relative to Moreton Bay RC, SEQ and Queensland. The secondary catchment also recorded a higher proportion of residents aged 35 to 44 years than Moreton Bay RC, SEQ and Queensland;
- The Caboolture West catchment was characterised by couple families with children households. The secondary catchment recorded a significantly higher proportion of couple families without children households than Moreton Bay RC, SEQ and Queensland. There was a significantly lower proportion of single parent family households in the Caboolture West and secondary catchments than in Moreton Bay RC, SEQ and Queensland;
- Both the average household size and average vehicle ownership were marginally higher in the Caboolture West catchment and secondary catchment than in Moreton Bay RC, SEQ and Queensland as at the 2011 Census;
- Almost half of the households in the Caboolture West catchment and over half of the households in the secondary catchment were purchasing their home in 2011 compared with less than 40% in Moreton Bay RC, SEQ and Queensland. The Caboolture West catchment and secondary catchment recorded a lower proportion of households renting than Moreton Bay RC, SEQ and Queensland;
- On average, household incomes and mortgages were higher in the Caboolture West catchment than in the secondary catchment, Moreton Bay RC and Queensland. Average weekly rents were similar in the Caboolture West catchment to Moreton Bay RC and Queensland;
- The unemployment rate was lower in the Caboolture West catchment than in Moreton Bay RC, and SEQ. The Caboolture West catchment recorded a higher proportion of persons working part-time than Moreton Bay RC, SEQ and Queensland. The Caboolture West catchment had strong labour force participation relative to the secondary catchment, Moreton Bay RC, SEQ and Queensland. The secondary catchment recorded a significantly lower unemployment rate than the Caboolture West catchment, Moreton Bay RC, SEQ and Queensland;
- The Caboolture West catchment and secondary catchment recorded a lower proportion of persons with a post-school qualification relative to Moreton Bay RC, SEQ and Queensland.

Post-school qualifications in the Caboolture West catchment and secondary catchment were driven by persons with a certificate;

- The Caboolture West catchment and secondary catchment recorded a higher proportion of persons employed as technicians and trades workers than Moreton Bay RC, SEQ and Queensland. The secondary catchment also recorded a higher proportion of persons employed at labourers than the Caboolture West catchment, Moreton Bay RC, SEQ and Queensland; and
- In 2011, the most significant industries in terms of employment in the Caboolture West catchment and secondary catchment were construction, retail trade and health care and social assistance. In 2011, the Caboolture West catchment recorded a higher proportion of persons employed in the agriculture, forestry and fishing, wholesale trade and transport, postal and warehousing industries than Queensland.

Table 2.1: Socio-Economic Profile of Caboolture West and Secondary Catchments, 2011 Census

	Caboolture West Catchment	Secondary Catchment	MBRC	SEQ	Queensland
Population	3,988	3,071	378,045	3,302,559	4,332,739
Age Distribution					
0-4 years	6.1%	6.6%	7.5%	6.9%	6.9%
5-14 years	14.9%	16.2%	14.5%	13.2%	13.3%
15-19 years	8.0%	7.0%	7.1%	6.9%	6.8%
20-24 years	5.0%	3.5%	5.9%	7.1%	6.8%
25-34 years	8.8%	10.2%	12.1%	14.0%	13.6%
35-44 years	14.7%	16.2%	14.8%	14.6%	14.3%
45-54 years	16.2%	14.7%	13.5%	13.4%	13.6%
55-64 years	14.9%	13.3%	11.7%	11.2%	11.6%
65-74 years	7.8%	9.3%	7.6%	7.1%	7.4%
75-84 years	2.8%	2.4%	3.9%	4.0%	4.1%
85 years and over	0.7%	0.7%	1.5%	1.7%	1.6%
Average age (years)	38.0	37.7	37.3	37.4	37.7
Household Type (% of families)					
Couple families with children	48.1%	43.4%	44.9%	43.6%	42.8%
Couple families without children	40.7%	44.7%	37.3%	38.2%	39.5%
Single parent family	10.4%	11.8%	16.6%	16.4%	16.1%
Other	0.9%	0.0%	1.2%	1.8%	1.7%
Average household size	3.1	3.1	2.9	2.8	2.8
Average vehicle ownership	2.3	2.1			
Household Finances					
% of households fully owning home	34.7%	31.4%	27.9%	27.8%	29.0%
% of households purchasing home	47.0%	51.2%	39.8%	36.0%	34.5%
% of households renting	16.6%	16.1%	29.3%	33.0%	33.2%
Average weekly household income	$1,573	$1,457	$1,490	$1,534	$1,501
Average monthly housing loan repayment	$2,069	$2,034	$1,973	$2,033	$1,976
Average weekly rent payment	$298	$268	$298	$322	$299
Labour Market					
Full-time employment (% labour force)	55.5%	60.0%	59.5%	59.3%	60.0%
Part-time employment (% labour force)	32.2%	28.9%	28.5%	29.0%	28.2%
Total employment (% labour force)	95.0%	96.2%	93.8%	93.8%	93.9%
Unemployment rate (% labour force)	5.0%	3.8%	6.2%	6.2%	6.1%
Participation rate (% of population > 15 years)	67.0%	60.8%	63.0%	63.7%	62.8%
Qualifications					
% of persons with a post-school qualification	32.3%	33.4%	42.2%	45.6%	43.3%
% of persons with Bachelor or higher	9.1%	9.0%	12.1%	18.3%	15.9%
% of persons with Diploma	6.0%	5.5%	8.0%	8.2%	7.5%
% of persons with Certificate	17.2%	18.8%	22.2%	19.1%	19.9%

	Caboolture West Catchment	Secondary Catchment	MBRC	SEQ	Queensland
Occupation					
Upper White Collar					
Managers	14.0%	14.3%	10.7%	11.7%	12.0%
Professionals	14.2%	14.7%	15.9%	20.9%	18.9%
Subtotal	*28.2%*	*29.0%*	26.6%	32.6%	31.0%
Lower White Collar					
Community & Personal Service Workers	14.7%	14.5%	10.5%	10.0%	10.0%
Clerical and Admin Workers	8.7%	9.2%	16.7%	15.6%	14.7%
Sales Workers	10.1%	7.9%	10.5%	10.2%	9.8%
Subtotal	*33.6%*	*31.6%*	37.7%	35.8%	34.4%
Upper Blue Collar					
Technicians & Trades Workers	17.3%	17.3%	16.0%	14.2%	14.9%
Subtotal	*17.3%*	*17.3%*	16.0%	14.2%	14.9%
Lower Blue Collar					
Machinery Operators & Drivers	7.9%	7.2%	7.4%	6.1%	7.3%
Labourers	10.8%	13.2%	10.5%	9.6%	10.6%
Subtotal	*18.7%*	*20.4%*	18.0%	15.7%	17.9%
Employment by Industry (% of employees)					
Agriculture, forestry & fishing	7.3%	7.8%	1.0%	0.9%	0.9%
Mining	0.7%	1.0%	1.1%	1.2%	1.2%
Manufacturing	8.9%	8.7%	9.9%	8.7%	8.7%
Electricity, gas, water & waste services	0.7%	1.7%	1.4%	1.1%	1.1%
Construction	12.5%	10.3%	10.0%	9.1%	9.1%
Wholesale trade	4.5%	4.0%	3.9%	3.9%	3.9%
Retail trade	11.3%	10.0%	11.5%	10.7%	10.7%
Accommodation & food services	4.7%	5.5%	5.6%	6.9%	6.9%
Transport, postal & warehousing	6.1%	5.3%	6.5%	5.2%	5.2%
Information media & telecommunications	0.3%	0.7%	1.2%	1.4%	1.4%
Financial & insurance services	1.2%	2.2%	2.8%	3.2%	3.2%
Rental, hiring & real estate services	1.5%	1.9%	1.7%	1.9%	1.9%
Professional, scientific & technical services	4.8%	5.2%	5.7%	7.6%	7.6%
Administrative & support services	3.3%	2.9%	3.2%	3.4%	3.4%
Public administration & safety	6.5%	8.6%	7.3%	6.6%	6.6%
Education & training	7.7%	7.7%	6.9%	8.0%	8.0%
Health care & social assistance	10.2%	9.0%	12.7%	12.3%	12.3%
Arts & recreation services	0.9%	1.4%	1.2%	1.6%	1.6%
Other services	4.3%	4.3%	6.4%	6.1%	6.1%

Source: 2011 Census of Population and Housing 2nd release data

As at the 2011 Census, the Caboolture West catchment was a predominantly rural / rural residential catchment characterised by:

- Sparsely population area;
- Higher number of vehicles per household; and
- Higher proportion of residents employed in the agriculture, forestry and fishing industry.

As the Caboolture West catchment reaches build out the socio-economic profile of the catchment is anticipated to transition from a largely rural community to a suburban one. Between 2011 and 2031, Caboolture West catchment is anticipated to experience:

- Increases in the proportion of children;
- Increases in the proportion of couple families with children households;
- Decreases in the average number of vehicles per household;
- A decline in the proportion of households fully owning their home (i.e. an increase in the proportion of dwellings subject to a mortgage);
- Increases in average household incomes accompanied by increases in housing costs (i.e. mortgage repayments and rents);
- A transition from persons employed in blue collar professions to persons employed in white collar professions;
- A decline in the proportion of persons employed in the agriculture, forestry and fishing, construction and education and training industries; and
- Increases in the proportion of persons employed in the financial and insurance services, professional, scientific and technical services, and health care and social assistance industries.

Table 2.2 below provides a projection of anticipated changes in the socio-economic profile of the Caboolture West MPA catchment area as it urbanises.

Table 2.2: Socio-Economic Profile of Caboolture West Catchment, 2011 to 2031

	2011	2016	2021	2026	2031+
Age Distribution					
0-4 years	6.1%	7.2%	8.3%	9.4%	10.5%
5-14 years	14.9%	15.6%	16.3%	17.0%	17.7%
15-19 years	8.0%	7.6%	7.2%	6.8%	6.4%
20-24 years	5.0%	5.2%	5.4%	5.6%	5.7%
25-34 years	8.8%	10.4%	12.1%	13.8%	15.4%
35-44 years	14.7%	15.8%	16.9%	18.0%	19.1%
45-54 years	16.2%	14.8%	13.5%	12.2%	10.8%
55-64 years	14.9%	13.0%	11.0%	9.0%	7.1%
65-74 years	7.8%	6.9%	6.0%	5.0%	4.1%
75-84 years	2.8%	2.6%	2.4%	2.2%	2.0%
85 years and over	0.7%	0.8%	0.9%	1.0%	1.1%
Average age (years)	38.0	36.5	34.9	33.4	31.8
Household Type (% of families)					
Couple families with children	48.1%	49.6%	51.1%	52.6%	54.2%
Couple families without children	40.7%	38.7%	36.7%	34.7%	32.7%
Single parent family	10.4%	10.9%	11.4%	11.9%	12.4%
Other	0.9%	0.8%	0.8%	0.8%	0.7%
Average household size	3.1	3.1	3.1	3.1	3.1
Average vehicle ownership	2.3	2.2	2.1	1.9	1.8
Household Finances					
% of households fully owning home	34.7%	29.9%	25.0%	20.2%	15.3%
% of households purchasing home	47.0%	47.3%	47.5%	47.8%	48.0%
% of households renting	16.6%	20.8%	25.1%	29.3%	33.6%
Average weekly household income	$1,573	$1,639	$1,705	$1,771	$1,836
Average monthly housing loan repayment	$2,069	$2,134	$2,199	$2,265	$2,330
Average weekly rent payment	$298	$320	$342	$364	$386
Labour Market					
Full-time employment (% labour force)	55.5%	57.8%	60.2%	62.5%	64.8%
Part-time employment (% labour force)	32.2%	30.3%	28.5%	26.6%	24.8%
Total employment (% labour force)	95.0%	95.0%	95.1%	95.1%	95.2%
Unemployment rate (% labour force)	5.0%	5.0%	4.9%	4.9%	4.8%
Participation rate (% of population > 15 years)	67.0%	68.7%	70.4%	72.0%	73.7%
Qualifications					
% of persons with a non-school qualification	32.3%	33.3%	34.3%	35.3%	36.3%
% of persons with Bachelor or higher	9.1%	9.9%	10.7%	11.5%	12.2%
% of persons with Diploma	6.0%	6.5%	6.9%	7.3%	7.7%
% of persons with Certificate	17.2%	16.9%	16.7%	16.5%	16.3%
Occupation					
Upper White Collar					
Managers	14.0%	13.8%	13.6%	13.4%	13.1%
Professionals	14.2%	15.6%	16.9%	18.2%	19.5%
Subtotal	*28.2%*	*29.3%*	*30.4%*	*31.5%*	*32.6%*
Lower White Collar					
Community & Personal Service Workers	14.7%	15.4%	16.1%	16.8%	17.5%
Clerical and Admin Workers	8.7%	9.1%	9.5%	9.9%	10.2%
Sales Workers	10.1%	10.4%	10.7%	11.0%	11.3%
Subtotal	*33.6%*	*34.9%*	*36.3%*	*37.7%*	*39.0%*

	2011	2016	2021	2026	2031+
Upper Blue Collar					
Technicians & Trades Workers	17.3%	16.5%	15.8%	15.1%	14.3%
Subtotal	*17.3%*	*16.5%*	*15.8%*	*15.1%*	*14.3%*
Lower Blue Collar					
Machinery Operators & Drivers	7.9%	7.2%	6.5%	5.8%	5.1%
Labourers	10.8%	10.0%	9.1%	8.3%	7.5%
Subtotal	*18.7%*	*17.2%*	*15.6%*	*14.1%*	*12.5%*
Employment by Industry (% of employees)					
Agriculture, forestry & fishing	7.3%	5.6%	3.8%	2.0%	0.2%
Mining	0.7%	0.9%	1.1%	1.2%	1.4%
Manufacturing	8.9%	8.9%	9.0%	9.0%	9.1%
Electricity, gas, water & waste services	0.7%	1.0%	1.2%	1.4%	1.6%
Construction	12.5%	11.7%	10.8%	10.0%	9.1%
Wholesale trade	4.5%	4.4%	4.3%	4.2%	4.0%
Retail trade	11.3%	11.4%	11.5%	11.6%	11.7%
Accommodation & food services	4.7%	4.8%	4.9%	5.0%	5.1%
Transport, postal & warehousing	6.1%	6.3%	6.5%	6.8%	7.0%
Information media & telecommunications	0.3%	0.5%	0.7%	0.9%	1.1%
Financial & insurance services	1.2%	1.9%	2.5%	3.2%	3.8%
Rental, hiring & real estate services	1.5%	1.7%	1.9%	2.0%	2.2%
Professional, scientific & technical services	4.8%	5.2%	5.7%	6.1%	6.5%
Administrative & support services	3.3%	3.3%	3.3%	3.3%	3.3%
Public administration & safety	6.5%	6.8%	7.0%	7.3%	7.5%
Education & training	7.7%	7.4%	7.1%	6.7%	6.4%
Health care & social assistance	10.2%	10.9%	11.6%	12.3%	13.0%
Arts & recreation services	0.9%	0.9%	0.9%	0.9%	0.9%
Other services	4.3%	4.2%	4.1%	3.9%	3.8%

Source: Derived from 2011 Census of Population and Housing 2nd release data

2.3 Population Projections

The Caboolture West catchment could potentially house in the order of 60,000 persons, with build out anticipated to occur around 2046. The number of households within the Caboolture West catchment is anticipated to increase from 1,311 households in 2012 to 21,429 households in 2046. Population growth in the Caboolture West catchment is anticipated to account for approximately 22.9% of population growth in Moreton Bay RC.

The population of the secondary catchment is projected to increase from 3,195 persons in 2012 to 5,820 persons in 2046. The number of households in the secondary catchment is anticipated to increase from 1,045 households in 2012 to 2,078 households in 2046. The secondary catchment is not expected to be a significant source of growth, but is likely to influence retail and commercial floor space demand at any centres located along the D'Aguilar Highway (e.g. Wamuran).

Table 2.3 below provides a detailed summary of population and household projections for the Caboolture West MPA, its secondary catchment and the Moreton Bay Regional Council area between 2012 and 2046 (assumed build out date).

Table 2.3: Population and household projections, 2012 to 2046

	2012	2016	2021	2026	2031	2036	2041	2046
Population								
Caboolture West Catchment	4,052	4,318	9,330	19,352	30,489	43,852	54,432	60,000
Secondary Catchment	3,195	3,741	4,254	4,684	5,033	5,304	5,566	5,820
Moreton Bay RC	391,596	434,938	473,677	504,240	534,362	566,283	600,112	635,961
Households								
Caboolture West Catchment	1,311	1,413	3,096	6,514	10,413	15,198	19,148	21,429
Secondary Catchment	1,045	1,236	1,423	1,587	1,727	1,844	1,961	2,078
Moreton Bay RC	155,589	173,389	190,333	204,033	216,221	229,137	242,825	257,330
Average Household Size								
Caboolture West Catchment	3.09	3.06	3.01	2.97	2.93	2.89	2.84	2.80
Secondary Catchment	3.06	3.03	2.99	2.95	2.91	2.88	2.84	2.80

Source: Derived from 2011 Census of Population and Housing - 1st release data, OESR (2011), MBRC (2012c) and Economic Associates estimates

Population growth rates and household formation rates n the Caboolture West catchment, are anticipated to peak at levels in excess of 15% per annum between 2017 and 2021. However, growth rates would slow significantly as the MPA approached build out, with population growth and household formation rates declining to 2.0% and 2.3% per annum respectively between 2042 and 2046.

Population growth and household formation in the secondary catchment is anticipated to slow over the whole of the projection period.

Table 2.4 below provides a detailed summary of population growth and household formation rates within the Caboolture West catchment, its secondary catchment and the Moreton Bay Regional Council area.

Table 2.4: Population growth and household formation, per annum, 2012 to 2046

	2013-16	2017-21	2022-26	2027-31	2032-36	2037-41	2042-46
Population Growth							
Caboolture West catchment	1.3%	16.7%	15.7%	9.5%	7.5%	4.4%	2.0%
Secondary catchment	3.2%	2.6%	1.9%	1.4%	1.1%	1.0%	0.9%
Moreton Bay RC	2.1%	1.7%	1.3%	1.2%	1.2%	1.2%	1.2%
Household Formation							
Caboolture West catchment	1.5%	17.0%	16.0%	9.8%	7.9%	4.7%	2.3%
Secondary catchment	3.4%	2.9%	2.2%	1.7%	1.3%	1.2%	1.2%
Moreton Bay RC	2.2%	1.9%	1.4%	1.2%	1.2%	1.2%	1.2%

Source: Derived from Table 2.3

3 EXISTING CENTRES NETWORK

There are very limited centre activities currently within the Caboolture West MPA. The only designated centre within the MPA is the Wamuran Local Centre. Hence, the Caboolture West MPA is largely serviced by centre activities outside its catchments. The most notable centre currently servicing the Caboolture West MPA is the Caboolture Morayfield Principal Activity Centre (PAC).

This section provides an overview of centres within the influence of the Caboolture West MPA.

3.1 Caboolture-Morayfield Principal Activity Centre

The Caboolture-Morayfield Principal Activity Centre (PAC) 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 PAC has a total estimated floor space of 235,667m^2 of which an estimated 72.2% is occupied by retail floor space, 15.7% is occupied by commercial floor space and 7.5% 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 PAC.

The Caboolture-Morayfield PAC is also notable for hosting a range of government services and providers, including Moreton Bay Regional Council, regional offices of various state government agencies and the Caboolture TAFE.

The Caboolture-Morayfield PAC has two distinct precincts which are divided by the Caboolture River, namely:

- Caboolture including Caboolture Park Shopping Centre (district scale shopping centre); and
- Morayfield including Morayfield Shopping Centre (sub-regional scale shopping centre).

Morayfield Shopping Centre is located at 171 Morayfield Road, Morayfield and has an estimated floor space of 59,316m^2 with an estimated 97.1% occupied by retail floor space and 2.1% occupied by commercial floor space. The major tenants of Morayfield Shopping Centre include:

- Discount department stores, including Big W (7,991m^2), Target (7,238m^2) and Kmart (6,928m^2);
- Supermarkets including Coles (4,206m^2) and Woolworths (4,112m^2); and
- Event Cinemas (eight screen multiplex).

Caboolture Park Shopping Centre is located at 60-78 King Street, Caboolture and has an estimated floor space of 14,659m^2. The centre is anchored by Kmart (6,785m^2) and Coles Supermarket (4,472m^2). Within Caboolture Park Shopping Centre, retail floor space accounts for approximately 89.3% of total floor space, while commercial floor space accounts for approximately 7.9% of total floor space.

The balance of the Caboolture-Morayfield PAC comprises an estimated 161,692m^2 of floor space of which approximately 61.6% is occupied by retail floor space, 21.4% is occupied by commercial floor space and 10.9% is occupied by community facilities and other floor space.

Table 3.1 below provides a summary of centre activities within the Caboolture-Morayfield PAC.

Table 3.1: Caboolture-Morayfield Principal Activity Centre

	Caboolture-Morayfield PAC Total		Morayfield Shopping Centre		Caboolture Park Shopping Centre		Caboolture-Morayfield PAC Balance	
Major Tenants			Big W	7,991m²	Kmart	6,785m²	Woolworths	3,634m²
			Target	7,238m²	Coles	4,742m²		
			Kmart	6,928m²				
			Coles	4,206m²				
			Woolworths	4,112m²				
	Area	**% of Total**	**Area**	**% of Total**	**Area**	**% of Total**	**Area**	**% of Total**
Groceries	23,328	9.9%	8,672	14.6%	4,995	34.1%	9,661	6.0%
Dept Store/DDS	31,841	13.5%	22,157	37.4%	6,785	46.3%	2,899	1.8%
Take-away & dining[1]	6,087	2.6%	1,255	2.1%	101	0.7%	4,731	2.9%
Specialty[2]	42,740	18.1%	21,506	36.3%	1,117	7.6%	20,116	12.4%
Core Bulky	19,209	8.2%	852	1.4%	90	0.6%	18,267	11.3%
Ancillary Bulky	34,800	14.8%	3,140	5.3%	0	0.0%	31,660	19.6%
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	**170,228**	**72.2%**	**57,584**	**97.1%**	**13,088**	**89.3%**	**99,556**	**61.6%**
Total Commercial	**37,028**	**15.7%**	**1,229**	**2.1%**	**1,160**	**7.9%**	**34,640**	**21.4%**
Community Facilities & Other	**17,621**	**7.5%**	**0**	**0.0%**	**0**	**0.0%**	**17,621**	**10.9%**
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.

3.2 Local Centres

Within the Caboolture West catchment are Wamuran Shopping Centre (612m^2) and an estimated 1,371m^2 of strip retail located along the D'Aguilar Highway at Wamuran. Within the secondary catchment there is an estimated 1,114m^2 of strip retail located along the D'Aguilar Highway at D'Aguilar.

There were 17 local centres identified servicing the trade areas ranging from 277m^2 (Argyll Street Centre) to 10,169m^2 (strip retail along Williams Street, Dayboro).

Table 3.2 below provides a summary of floor space information of local centres currently servicing the Caboolture West MPA catchment area and its secondary catchment.

Table 3.2: Local centres servicing the trade areas

Centre Name	Address	Floor Space (sqm)	Tenants
<u>Within Caboolture West Catchment</u>			
Wamuran Shopping Centre	D'Aguilar Highway	612	The centre includes two hair salons, a pharmacy, a real estate agent and a fitness centre.
Wamuran Strip Retail	D'Aguilar Highway	1,371	Strip retail along the D'Aguilar Highway at Wamuran includes eleven convenience retail tenancies, a medical centre and veterinary.
<u>Within Secondary Catchment</u>			
D'Aguilar	D'Aguilar Highway	1,114	Located along the D'Aguilar Highway at D'Aguilar are the D'Aguilar Hotel, a bottleshop, corner store and service station.
<u>Outside the trade areas</u>			
The Big Fish Tavern	Bruce Highway	470	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.
Tullawong Corner Store	Parish Road	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	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	277	Includes three convenience retail stores.
Bellmere Shopping Centre	Bellmere Road	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	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	1,930	The centre includes Trader Dukes Tavern and eleven convenience retail tenancies.
Woodford Shopping Centre	73-75 Archer Street	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	1,956	The centre includes Supa IGA (1,344m^2) and three convenience retail tenancies.

Centre Name	Address	Floor Space (sqm)	Tenants
Woodford Strip Retail	Archer Street	7,067	Strip retail along Archer Street at Woodford includes a variety of convenience retail and commercial tenancies.
Elimbah	Beerburrum Road	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	550	The centre includes a convenience food store, bottleshop and a combined bakery and café.
Parkridge Shopping Village	Parkridge Avenue	1,123	The centre includes FoodWorks convenience centre, bottleshop, hair salon, beauty salon and a lawyers office.
Glenwood Drive Centre	Glenwood Drive	1,205	The centre comprises seven retail tenancies including IGA convenience centre.
Hillcrest Gardens Shopping Centre	Cresthaven Drive	661	The centre includes a combined convenience and take-away food store, bakery, hair salon and a women's clinic.
Dayboro	Williams Street	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	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.

4 RETAIL ASSESSMENT

The retail assessment estimates:

- Available retail expenditure;
- Retail expenditure likely to be retained within the catchment based on expenditure retention assumptions;
- Retail floor space supportable by retained expenditure; and
- The supply-demand balance of retail floor space based on existing floor space provision and future retail floor space demand.

4.1 Available Retail Expenditure

Retail expenditure analysis seeks to identify retail expenditure patterns for households in identified trade 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:

- Groceries and take home food;
- Dining including on-premise liquor;
- Fast food and take-away food;
- Clothing, footwear and apparel;
- Personal and other goods;
- Core bulky goods [2];
- Ancillary bulky goods[3];
- Hardware; and
- Takeaway liquor.

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.

Caboolture West will be an emerging community and is anticipated to transition to a similar retail expenditure profile of the North Lakes master planned community by 2031.

Table 4.1 below summarises the estimated weekly retail expenditure patterns of households within the trade areas between 2012 and 2046, based on the above retail categories.

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[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

Table 4.1: Weekly retail expenditure patterns of trade area households, 2012-2046 (2011 dollars)

Retail Expenditure Category	2012	2016	2021	2026	2031	2036	2041	2046
<u>Caboolture West Catchment</u>								
Groceries & take home food	$211.02	$217.57	$226.05	$234.86	$244.01	$250.17	$256.49	$262.97
Dining & take-away food (incl. on-premise liquor)	$107.22	$110.55	$114.86	$119.33	$125.98	$129.17	$132.43	$135.77
Clothing, footwear & apparel	$68.81	$70.95	$73.71	$76.59	$78.66	$80.65	$82.68	$84.77
Personal & other goods	$87.53	$90.25	$93.77	$97.42	$102.63	$105.22	$107.88	$110.60
Core bulky goods	$55.95	$57.68	$59.93	$62.27	$64.43	$66.06	$67.72	$69.43
Ancillary bulky goods	$75.73	$78.08	$81.12	$84.28	$86.85	$89.05	$91.30	$93.60
Hardware	$20.85	$21.50	$22.33	$23.20	$24.49	$25.11	$25.74	$26.39
Takeaway liquor	$25.67	$26.47	$27.50	$28.58	$29.62	$30.37	$31.13	$31.92
Total Grocery & Specialty	***$500.26***	***$515.79***	***$535.89***	***$556.78***	***$580.91***	***$595.58***	***$610.62***	***$626.04***
Total Bulky Goods	***$152.52***	***$157.26***	***$163.39***	***$169.75***	***$175.77***	***$180.21***	***$184.76***	***$189.43***
Total	***$652.78***	***$673.05***	***$699.28***	***$726.53***	***$756.68***	***$775.79***	***$795.38***	***$815.46***
<u>Secondary Catchment</u>								
Groceries & take home food	$190.85	$194.69	$199.61	$204.65	$209.82	$215.11	$220.55	$226.11
Dining & take-away food (incl. on-premise liquor)	$93.87	$95.76	$98.18	$100.65	$103.20	$105.80	$108.47	$111.21
Clothing, footwear & apparel	$63.65	$64.93	$66.57	$68.25	$69.97	$71.74	$73.55	$75.41
Personal & other goods	$76.98	$78.53	$80.51	$82.54	$84.63	$86.76	$88.95	$91.20
Core bulky goods	$51.01	$52.03	$53.35	$54.70	$56.08	$57.49	$58.94	$60.43
Ancillary bulky goods	$69.60	$71.00	$72.79	$74.63	$76.52	$78.45	$80.43	$82.46
Hardware	$18.26	$18.63	$19.10	$19.58	$20.08	$20.59	$21.11	$21.64
Takeaway liquor	$23.33	$23.80	$24.40	$25.01	$25.64	$26.29	$26.96	$27.64
Total Grocery & Specialty	***$448.66***	***$457.70***	***$469.26***	***$481.11***	***$493.26***	***$505.71***	***$518.48***	***$531.58***
Total Bulky Goods	***$138.87***	***$141.67***	***$145.24***	***$148.91***	***$152.67***	***$156.53***	***$160.48***	***$164.53***
Total	***$587.53***	***$599.37***	***$614.50***	***$630.02***	***$645.93***	***$662.24***	***$678.96***	***$696.11***

Source: Derived from ABS (2011) Household Expenditure Survey, 2009-10 and the 2011 Census of Population & Housing.

Total available retail expenditure is estimated by applying weekly household expenditure rates to the projected number of household in any given year and annualised.

Table 4.2 below provides a detailed breakdown of the annual available retail expenditure by retail category. Annual available retail expenditure in the Caboolture West catchment is anticipated to increase from $44.51 million in 2012 to $908.66 million in 2046, or by approximately 9.3% per annum.

In the secondary catchment, annual available retail expenditure is anticipated to increase from $31.93 million in 2012 to $75.23 million in 2046, or by approximately 2.6% per annum.

Table 4.2: Annual available retail expenditure within the trade areas, 2012-2046 ($M) (2011 dollars)

Retail Expenditure Category	2012	2016	2021	2026	2031	2036	2041	2046
Caboolture West Catchment								
Groceries & take home food	$14.39	$15.99	$36.39	$79.56	$132.12	$197.72	$255.39	$293.02
Dining & take-away food (incl. on-premise liquor)	$7.31	$8.12	$18.49	$40.42	$68.22	$102.08	$131.86	$151.29
Clothing, footwear & apparel	$4.69	$5.21	$11.87	$25.94	$42.59	$63.74	$82.33	$94.46
Personal & other goods	$5.97	$6.63	$15.10	$33.00	$55.57	$83.16	$107.42	$123.24
Core bulky goods	$3.81	$4.24	$9.65	$21.09	$34.89	$52.21	$67.43	$77.37
Ancillary bulky goods	$5.16	$5.74	$13.06	$28.55	$47.03	$70.38	$90.90	$104.30
Hardware	$1.42	$1.58	$3.60	$7.86	$13.26	$19.84	$25.63	$29.41
Takeaway liquor	$1.75	$1.95	$4.43	$9.68	$16.04	$24.00	$31.00	$35.57
Total Grocery & Specialty	***$34.11***	***$37.90***	***$86.28***	***$188.61***	***$314.54***	***$470.69***	***$607.99***	***$697.58***
Total Bulky Goods	***$10.40***	***$11.55***	***$26.30***	***$57.50***	***$95.17***	***$142.42***	***$183.97***	***$211.07***
Total	***$44.51***	***$49.45***	***$112.58***	***$246.11***	***$409.71***	***$613.11***	***$791.96***	***$908.66***
Secondary Catchment								
Groceries & take home food	$10.37	$12.51	$14.77	$16.89	$18.85	$20.63	$22.49	$24.44
Dining & take-away food (incl. on-premise liquor)	$5.10	$6.15	$7.27	$8.31	$9.27	$10.15	$11.06	$12.02
Clothing, footwear & apparel	$3.46	$4.17	$4.93	$5.63	$6.29	$6.88	$7.50	$8.15
Personal & other goods	$4.18	$5.05	$5.96	$6.81	$7.60	$8.32	$9.07	$9.86
Core bulky goods	$2.77	$3.34	$3.95	$4.51	$5.04	$5.51	$6.01	$6.53
Ancillary bulky goods	$3.78	$4.56	$5.39	$6.16	$6.87	$7.52	$8.20	$8.91
Hardware	$0.99	$1.20	$1.41	$1.62	$1.80	$1.97	$2.15	$2.34
Takeaway liquor	$1.27	$1.53	$1.81	$2.06	$2.30	$2.52	$2.75	$2.99
Total Grocery & Specialty	***$24.38***	***$29.42***	***$34.73***	***$39.70***	***$44.31***	***$48.50***	***$52.88***	***$57.45***
Total Bulky Goods	***$7.55***	***$9.11***	***$10.75***	***$12.29***	***$13.71***	***$15.01***	***$16.37***	***$17.78***
Total	***$31.93***	***$38.52***	***$45.48***	***$51.99***	***$58.02***	***$63.51***	***$69.25***	***$75.23***

Source: Derived from Table 2.3 and Table 4.1

4.2 Retail Expenditure Retention Rates

The Caboolture West catchment is anticipated to experience retail expenditure leakage to higher order centres, particularly the Caboolture-Morayfield Principal Activity Centre. However, as the Caboolture West catchment becomes more developed, retail expenditure retention is anticipated to increase. Between 2012 and 2031, retail expenditure retention is anticipated to increase as follows:

- Groceries and take home food: 50% in 2012 to 90% by 2031;
- Dining and take-away food, including on-premise liquor: 30% in 2012 to 60% by 2031;
- Clothing, footwear and apparel: 20% in 2012 to 40% by 2031;
- Personal and other goods: 20% in 2012 to 40% by 2031;
- Core bulky goods: 20% in 2012 to 40% by 2031;
- Ancillary bulky goods: 20% in 2012 to 40% by 2031;
- Hardware: 20% in 2012 to 40% by 2031; and
- Takeaway liquor: 40% in 2012 to 80% by 2031.

The Caboolture West catchment is also likely to draw trade from the secondary catchment. The Caboolture West catchment is likely to capture secondary catchment area retail expenditure of:

- Groceries and take home food: 25% in 2012 to 50% by 2031;
- Dining and take-away food, including on-premise liquor: 15% in 2012 to 30% by 2031;
- Clothing, footwear and apparel: 10% in 2012 to 20% by 2031;
- Personal and other goods: 10% in 2012 to 20% by 2031;
- Core bulky goods: 10% in 2012 to 20% by 2031;
- Ancillary bulky goods: 10% in 2012 to 20% by 2031;
- Hardware: 10% in 2012 to 20% by 2031; and
- Takeaway liquor: 20% in 2012 to 40% by 2031.

Table 4.3 below provides a detailed breakdown of the anticipated retained and captured retail expenditure by retail category.

Table 4.3: Retail expenditure retention and capture rates, 2012 to 2046

Retail Category	2012	2016	2021	2026	2031+
Caboolture West Catchment					
Groceries & take home food	50%	60%	70%	80%	90%
Dining & take-away food (incl. on-premise liquor)	30%	35%	45%	55%	60%
Clothing, footwear & apparel	20%	25%	30%	35%	40%
Personal & other goods	20%	25%	30%	35%	40%
Core bulky goods	20%	25%	30%	35%	40%
Ancillary bulky goods	20%	25%	30%	35%	40%
Hardware	20%	25%	30%	35%	40%
Takeaway liquor	40%	50%	60%	70%	80%
Secondary Catchment					
Groceries & take home food	25%	30%	35%	40%	50%
Dining & take-away food (incl. on-premise liquor)	15%	20%	25%	30%	30%
Clothing, footwear & apparel	10%	10%	15%	20%	20%
Personal & other goods	10%	10%	15%	20%	20%
Core bulky goods	10%	10%	15%	20%	20%
Ancillary bulky goods	10%	10%	15%	20%	20%
Hardware	10%	10%	15%	20%	20%
Takeaway liquor	20%	25%	30%	35%	40%

4.3 Retained Retail Expenditure

Annual available retail expenditure retained within the Caboolture West catchment is anticipated to increase from $14.30 million in 2012 to $554.46 million in 2046. The Caboolture West catchment is anticipated to capture annual available retail expenditure from the secondary catchment in the order of $5.13 million in 2012 increasing to $24.18 million in 2046.

Table 4.4: Annual available retained retail expenditure, 2012-2046 ($m) (2011 dollars)

Retail Category	2012	2016	2021	2026	2031	2036	2041	2046
Caboolture West Catchment								
Groceries & take home food	$7.19	$9.59	$25.48	$63.65	$118.91	$177.94	$229.85	$263.72
Dining & take-away food (incl. on-premise liquor)	$2.19	$2.84	$8.32	$22.23	$40.93	$61.25	$79.12	$90.77
Clothing, footwear & apparel	$0.94	$1.30	$3.56	$9.08	$17.04	$25.49	$32.93	$37.78
Personal & other goods	$1.19	$1.66	$4.53	$11.55	$22.23	$33.26	$42.97	$49.30
Core bulky goods	$0.76	$1.06	$2.89	$7.38	$13.95	$20.88	$26.97	$30.95
Ancillary bulky goods	$1.03	$1.43	$3.92	$9.99	$18.81	$28.15	$36.36	$41.72
Hardware	$0.28	$0.39	$1.08	$2.75	$5.30	$7.94	$10.25	$11.76
Takeaway liquor	$0.70	$0.97	$2.66	$6.78	$12.83	$19.20	$24.80	$28.46
Total Grocery & Specialty	***$12.22***	***$16.37***	***$44.54***	***$113.29***	***$211.94***	***$317.15***	***$409.66***	***$470.03***
Total Bulky Goods	***$2.08***	***$2.89***	***$7.89***	***$20.13***	***$38.07***	***$56.97***	***$73.59***	***$84.43***
Total	***$14.30***	***$19.26***	***$52.43***	***$133.41***	***$250.01***	***$374.12***	***$483.25***	***$554.46***
Secondary Catchment								
Groceries & take home food	$2.59	$3.75	$5.17	$6.76	$9.42	$10.32	$11.25	$12.22
Dining & take-away food (incl. on-premise liquor)	$0.77	$1.23	$1.82	$2.49	$2.78	$3.04	$3.32	$3.61
Clothing, footwear & apparel	$0.35	$0.42	$0.74	$1.13	$1.26	$1.38	$1.50	$1.63
Personal & other goods	$0.42	$0.50	$0.89	$1.36	$1.52	$1.66	$1.81	$1.97
Core bulky goods	$0.28	$0.33	$0.59	$0.90	$1.01	$1.10	$1.20	$1.31
Ancillary bulky goods	$0.38	$0.46	$0.81	$1.23	$1.37	$1.50	$1.64	$1.78
Hardware	$0.10	$0.12	$0.21	$0.32	$0.36	$0.39	$0.43	$0.47
Takeaway liquor	$0.25	$0.38	$0.54	$0.72	$0.92	$1.01	$1.10	$1.19
Total Grocery & Specialty	***$4.38***	***$6.29***	***$9.16***	***$12.46***	***$15.90***	***$17.41***	***$18.98***	***$20.62***
Total Bulky Goods	***$0.75***	***$0.91***	***$1.61***	***$2.46***	***$2.74***	***$3.00***	***$3.27***	***$3.56***
Total	***$5.13***	***$7.20***	***$10.77***	***$14.92***	***$18.65***	***$20.41***	***$22.25***	***$24.18***

Source: Derived from Table 4.2 and Table 4.3.

4.4 Supportable Floor Space

In estimating the amount of retail floor space supportable by available retail expenditure by the Caboolture West catchment sales productivity 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.

Table 4.5 below provides a summary of the quantum of floor space that the Caboolture West catchment and secondary catchment could support based on the above sales productivities. Supportable floor space in the Caboolture West catchment is projected to increase from 2,459m^2 in 2012 to 97,252m^2 in 2046. In the secondary catchment, the supportable floor space in projected to increase from 883m^2 in 2012 to 4,164m^2 in 2046.

Table 4.5: Supportable floor space, 2012 to 2046 (m^2)

Retail Category	2012	2016	2021	2026	2031	2036	2041	2046
<u>Caboolture West Catchment</u>								
Groceries & take home food	846	1,128	2,997	7,488	13,990	20,935	27,041	31,026
Dining & take-away food (incl. on-premise liquor)	439	569	1,664	4,447	8,186	12,250	15,823	18,155
Clothing, footwear & apparel	209	290	791	2,018	3,786	5,666	7,318	8,396
Personal & other goods	265	368	1,006	2,567	4,940	7,392	9,548	10,955
Core bulky goods	218	303	827	2,109	3,987	5,966	7,707	8,842
Ancillary bulky goods	258	359	980	2,498	4,703	7,038	9,090	10,430
Hardware	114	158	431	1,100	2,122	3,175	4,101	4,705
Takeaway liquor	117	162	443	1,129	2,138	3,200	4,133	4,743
Total Grocery & Specialty	***1,876***	***2,517***	***6,902***	***17,649***	***33,040***	***49,442***	***63,864***	***73,274***
Total Bulky Goods	***590***	***819***	***2,238***	***5,708***	***10,811***	***16,179***	***20,898***	***23,977***
Total	***2,465***	***3,336***	***9,140***	***23,356***	***43,851***	***65,620***	***84,762***	***97,252***
<u>Secondary Catchment</u>								
Groceries & take home food	305	442	608	795	1,109	1,214	1,323	1,438
Dining & take-away food (incl. on-premise liquor)	153	246	363	498	556	609	664	721
Clothing, footwear & apparel	77	93	164	250	279	306	333	362
Personal & other goods	93	112	199	303	338	370	403	438
Core bulky goods	79	96	169	258	288	315	344	373
Ancillary bulky goods	95	114	202	308	344	376	410	446
Hardware	40	48	85	129	144	158	172	187
Takeaway liquor	42	64	90	120	154	168	183	199
Total Grocery & Specialty	***670***	***956***	***1,425***	***1,967***	***2,436***	***2,666***	***2,907***	***3,158***
Total Bulky Goods	***213***	***258***	***456***	***695***	***776***	***849***	***926***	***1,006***
Total	***883***	***1,214***	***1,881***	***2,662***	***3,211***	***3,515***	***3,833***	***4,164***

Source: Derived from Table 4.4 and Economic Associates estimates

4.5 Supply-Demand Balance

There was an undersupply of floor space in all retail categories in the Caboolture West catchment in 2012, except for take-away liquor and personal and other goods. In the Caboolture West catchment, an undersupply of 1,094m^2 of retail floor space in 2012 is projected to increase to 95,881m^2 in 2046. Additional floor space demand in the Caboolture West catchment is driven by demand for additional groceries and take home food and dining and take-away food (including on-premise liquor).

In the secondary catchment, there is estimated to be an oversupply of dining and take-away food and take-away liquor to 2036. In total there is demand for an additional 150m^2 of retail floor space in 2016, increasing to 3,100m^2 in 2046. Additional floor space demand in the secondary catchment is driven by demand for additional groceries and take home food.

Table 4.6 below shows the supply demand balance of retail floor space within the Caboolture West catchment and secondary catchment.

Table 4.6: Supply – Demand Balance, 2012 to 2046 (m^2)

	2012	2016	2021	2026	2031	2036	2041	2046
<u>Caboolture West Catchment</u>								
Groceries & take home food	-387	-669	-2,538	-7,029	-13,531	-20,476	-26,582	-30,567
Dining & take-away food (incl. on-premise liquor)	-60	-190	-1,285	-4,068	-7,807	-11,871	-15,444	-17,776
Clothing, footwear & apparel	-169	-250	-751	-1,978	-3,746	-5,626	-7,278	-8,356
Personal & other goods	3	-100	-738	-2,299	-4,672	-7,124	-9,280	-10,687
Core bulky goods	-218	-303	-827	-2,109	-3,987	-5,966	-7,707	-8,842
Ancillary bulky goods	-258	-359	-980	-2,498	-4,703	-7,038	-9,090	-10,430
Hardware	-114	-158	-431	-1,100	-2,122	-3,175	-4,101	-4,705
Takeaway liquor	108	63	-218	-904	-1,913	-2,975	-3,908	-4,518
Total Grocery & Specialty	***-505***	***-1,146***	***-5,531***	***-16,278***	***-31,669***	***-48,071***	***-62,493***	***-71,903***
Total Bulky Goods	***-590***	***-819***	***-2,238***	***-5,708***	***-10,811***	***-16,179***	***-20,898***	***-23,977***
Total	***-1,094***	***-1,965***	***-7,769***	***-21,985***	***-42,480***	***-64,249***	***-83,391***	***-95,881***
<u>Secondary Catchment</u>								
Groceries & take home food	-41	-178	-344	-531	-845	-950	-1,059	-1,174
Dining & take-away food (incl. on-premise liquor)	467	374	257	122	64	11	-44	-101
Clothing, footwear & apparel	-77	-93	-164	-250	-279	-306	-333	-362
Personal & other goods	-93	-112	-199	-303	-338	-370	-403	-438
Core bulky goods	-79	-96	-169	-258	-288	-315	-344	-373
Ancillary bulky goods	-95	-114	-202	-308	-344	-376	-410	-446
Hardware	-40	-48	-85	-129	-144	-158	-172	-187
Takeaway liquor	138	116	90	60	26	12	-3	-19
Total Grocery & Specialty	***394***	***108***	***-361***	***-903***	***-1,372***	***-1,602***	***-1,843***	***-2,094***
Total Bulky Goods	***-213***	***-258***	***-456***	***-695***	***-776***	***-849***	***-926***	***-1,006***
Total	***181***	***-150***	***-817***	***-1,598***	***-2,147***	***-2,451***	***-2,769***	***-3,100***

Source: Derived from Table 4.5, Economic Associates estimates

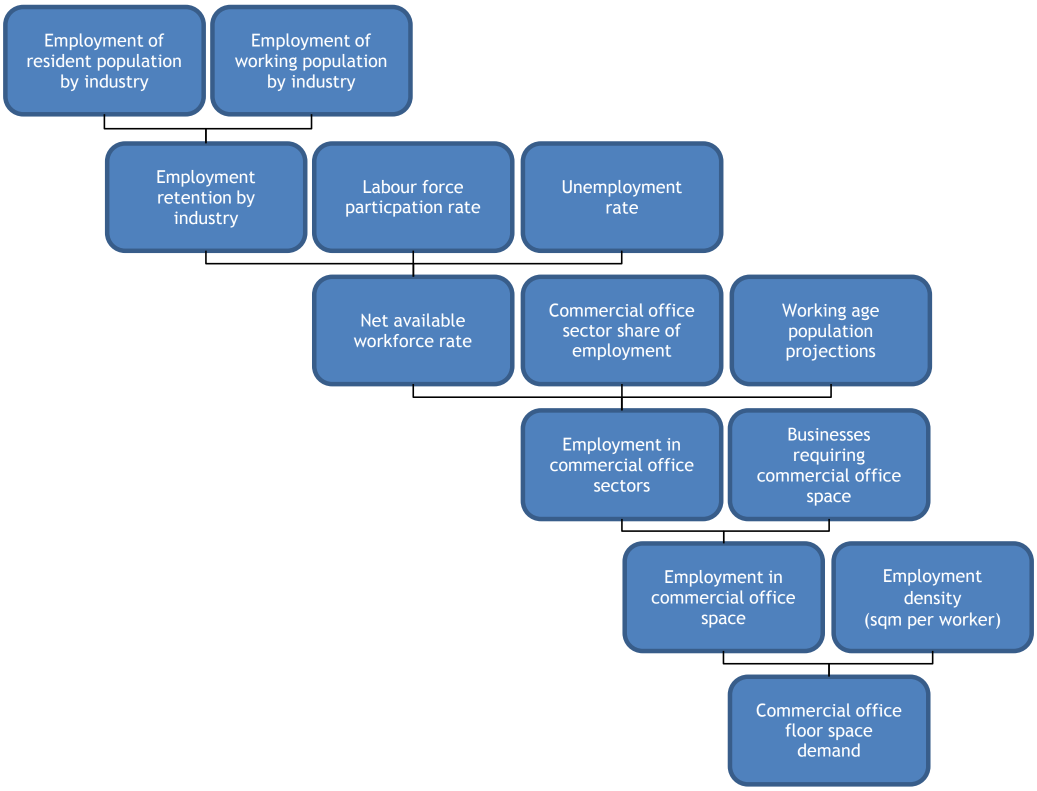
5 COMMERCIAL OFFICE DEMAND ANALYSIS

The commercial office assessment estimates demand for commercial office floor space within the Caboolture West catchment, assuming a catchment population of 60,000 persons is achieved by 2046.

5.1 Methodology

Figure 5.1 below outlines the methodology used to prepare commercial office floor space projections for the Caboolture West catchment.

Figure 5.1: Methodology for Preparing Commercial Office Demand Projections



5.2 Assumptions

5.2.1 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.

5.2.2 Working Age Population

The analysis presented below defines the working age population as comprising persons aged 15-64 years. The Australian Bureau of Statistics Labour Force Survey on the other hand considers the working age population to include persons aged 15 years and over. It is our view that the 15-64 year age cohort is more representative of the age range in which persons are likely to work, as persons in the 65 years and over age cohort are typically retired.

The working age population (15-64 years) within the Caboolture West catchment is projected to increase from 2,737 persons in 2012 to 38,707 persons in 2046, or by 8.1% per annum.

Table 5.1 below summarises the projected total population relative to the working population (i.e. those persons whose employment is located within the area).

Table 5.1: Projected Size of Total Population and Working Age Population, Caboolture West Catchment, 2012-2046

	2012	2016	2021	2026	2031	2036	2041	2046
15-64 population	2,737	2,889	6,167	12,639	19,669	28,290	35,115	38,707
Total population	4,052	4,318	9,330	19,352	30,489	43,852	54,432	60,000
15-64 population as % of total	67.5%	66.9%	66.1%	65.3%	64.5%	64.5%	64.5%	64.5%

Source: 2011 Census of Population and Housing - 2nd release data and Economic Associates estimates

[4] nfd – not further defined

5.2.3 Labour Market Characteristics

As of the 2011 Census of Population and Housing, the labour market of the Caboolture West catchment was characterised as follows:

- Unemployment rate (15-64 years): 5.2%; and
- Labour force participation rate (15-64 years): 75.9%.

It has been assumed that in the 2031 period and beyond, the unemployment rate of the Caboolture West catchment will trend upwards marginally to 5.5%, with the labour force participation rate converging to the midpoint between the Caboolture Morayfield catchment and the North Lakes catchment as of the 2011 Census.

Table 5.2 below summarises the unemployment and participation rate assumptions utilised within the employment modelling for the Caboolture West catchment.

Table 5.2: Projected Labour Market Characteristics (15-64 year old population), Caboolture West Catchment, 2012-2046

	2012	2016	2021	2026	2031+
Unemployment rate	5.3%	5.3%	5.4%	5.4%	5.5%
Labour force participation rate	75.8%	75.5%	75.0%	74.6%	74.1%

Source: 2011 Census of Population and Housing - 2nd release data and Economic Associates estimates

5.2.4 Employment by Industry

Employment in commercial office sectors in the Caboolture West catchment accounted for 15.9% of total employment as of the 2011 Census of Population and Housing. As the Caboolture West MPA develops, it is anticipated that an increasing share of employment will be generated within commercial office sectors. By 2031, it is projected that employment within commercial office sectors in the Caboolture West catchment will increase to 21.1% of total employment.

Table 5.3 below summarises the projected employment by industry share within commercial office sectors between 2012 and 2046.

Table 5.3: Projected Employment Share by Industry, Commercial Office Sectors, Caboolture West Catchment, 2012-2046

	2012	2016	2021	2026	2031+
Financial and insurance services					
Finance	0.7%	0.8%	1.1%	1.3%	1.6%
Insurance and Superannuation Funds	0.4%	0.6%	0.8%	1.1%	1.3%
Auxiliary Finance and Insurance Services	0.9%	0.9%	0.9%	0.8%	0.8%
Financial and Insurance Services, nfd	-	-	0.1%	0.1%	0.1%
Professional, scientific and technical services					
Professional, Scientific and Technical Services, nfd	-	-	-	-	-
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	3.9%	4.2%	4.4%	4.7%	4.9%
Computer System Design and Related Services	0.6%	0.8%	1.1%	1.3%	1.6%
Health care and social assistance					
Medical and Other Health Care Services	2.8%	2.9%	3.0%	3.1%	3.2%
Rental, hiring and real estate services					
Property Operators and Real Estate Services	1.3%	1.4%	1.4%	1.5%	1.6%
Public administration and safety					
Public Administration	4.0%	4.0%	3.9%	3.8%	3.8%
Information media and telecommunications					
Internet Publishing and Broadcasting	-	-	-	-	-
Internet Service Providers, Web Search Portals and Data Processing Services	-	-	0.1%	0.1%	0.1%
Administrative and support services					
Administrative Services	1.2%	1.4%	1.6%	1.8%	2.0%

Source: 2011 Census of Population and Housing – 2nd release data and Economic Associates estimates

5.2.5 Employment Retention

Employment retention data is available only at the SA2 level and above. The SA2s contained within the Caboolture Midwest SLA (of which the Caboolture West catchment is a part) are Elimbah, Upper Caboolture and Wamuran.

As of the 2011 Census of Population and housing, employment retention was less than 50% in all commercial office sectors, with the exception of computer systems design & related services (employment retention of 54.2%).

It is anticipated that by 2031, employment retention will converge to that recorded within the Mango-Hill Griffin catchment, as the population increases and the centres network within the Caboolture West MPA evolves.

Table 5.4 below summarises the assumed employment retention within the Caboolture West catchment between 2012 and 2031.

Table 5.4: Assumed Employment Retention, Caboolture West Catchment, 2012-2046

	2012	2016	2021	2026	2031+
Financial and insurance services					
Finance	9.3%	15.1%	22.3%	29.5%	36.8%
Insurance and Superannuation Funds	39.6%	47.9%	58.2%	68.6%	79.0%
Auxiliary Finance and Insurance Services	14.3%	27.0%	43.0%	58.9%	74.8%
Financial and Insurance Services, nfd	1.3%	6.7%	13.3%	20.0%	26.7%
Professional, scientific and technical services					
Professional, Scientific and Technical Services, nfd	-	-	-	-	-
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	25.8%	27.7%	30.0%	32.3%	34.6%
Computer System Design and Related Services	52.7%	46.8%	39.4%	32.1%	24.7%
Health care and social assistance					
Medical and Other Health Care Services	18.2%	26.5%	36.9%	47.3%	57.6%
Rental, hiring and real estate services					
Property Operators and Real Estate Services	43.9%	47.9%	53.0%	58.0%	63.1%
Public administration and safety					
Public Administration	6.2%	7.1%	8.1%	9.2%	10.3%
Information media and telecommunications					
Internet Publishing and Broadcasting	-	-	-	-	-
Internet Service Providers, Web Search Portals and Data Processing Services	0.9%	4.4%	8.8%	13.2%	17.6%
Administrative and support services					
Administrative Services	32.8%	30.4%	27.6%	24.7%	21.8%

Source: 2011 Census of Population and Housing - 2nd release data and Economic Associates estimates

5.3 Employment Projections for Commercial Office Space

5.3.1 Employment within Commercial Office Sectors

Based on the assumptions presented in Section 5.2 above, employment within commercial office sectors in the Caboolture West catchment is projected to increase from 67 persons in 2012 to persons in 2,192 persons in 2046.

By 2046, employment is projected to be highest within:

- Medical and other health care services – 507 persons employed;
- Professional, scientific and technical services (except computer systems design and related services) – 464 persons employed;
- Insurance and superannuation funds – 288 persons employed; and
- Property operators and real estate services – 269 persons employed.

Table 5.5 below summarises projected employment within commercial office sectors in the Caboolture West catchment.

Table 5.5: Projected Employment within Commercial Office Sectors, Caboolture West Catchment, 2012-2046

	2012	2016	2021	2026	2031	2036	2041	2046
Financial and insurance services								
Finance	1	3	11	35	79	114	142	156
Insurance and Superannuation Funds	3	6	21	67	146	211	261	288
Auxiliary Finance and Insurance Services	3	5	16	43	81	117	145	160
Financial and Insurance Services, nfd	-	-	-	2	5	7	9	10
Professional, scientific and technical services								
Professional, Scientific and Technical Services, nfd	-	-	-	-	-	-	-	-
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	20	24	58	135	236	339	421	464
Computer System Design and Related Services	6	8	19	38	55	79	98	108
Health care and social assistance								
Medical and Other Health Care Services	10	16	49	132	257	370	460	507
Rental, hiring and real estate services								
Property Operators and Real Estate Services	11	13	33	78	137	197	244	269
Public administration and safety								
Public Administration	5	6	14	32	54	77	96	106
Information media and telecommunications								
Internet Publishing and Broadcasting	-	-	-	-	-	-	-	-
Internet Service Providers, Web Search Portals and Data Processing Services	-	-	-	1	2	4	4	5
Administrative and support services								
Administrative Services	8	9	19	40	61	87	109	120
Total	67	89	241	602	1,114	1,602	1,988	2,192

Source: Economic Associates estimates

5.3.2 Employment within Commercial Office Space

Employment includes jobs in sole trader businesses as well as in 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.

Up to 60% of employment within commercial office sectors was being generated by employing businesses in the Caboolture West catchment, as at June 2011. By 2031, employing businesses could be generating up to 90% of commercial office based employment in the Caboolture West catchment.

Table 5.6 below summarises assumptions pertaining to the proportion of commercial office based employment within the Caboolture West catchment within employing businesses (i.e. not sole traders) between 2012 and 2046.

Table 5.6: Proportion of Employment within Employing Businesses, Caboolture West Catchment, 2012-2046

	2012	2016	2021	2026	2031+
Financial and insurance services					
Finance	35%	36%	38%	39%	40%
Insurance and Superannuation Funds	35%	36%	38%	39%	40%
Auxiliary Finance and Insurance Services	35%	36%	38%	39%	40%
Financial and Insurance Services, nfd	35%	36%	38%	39%	40%
Professional, scientific and technical services					
Professional, Scientific and Technical Services, nfd	61%	65%	70%	75%	80%
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	61%	65%	70%	75%	80%
Computer System Design and Related Services	61%	65%	70%	75%	80%
Health care and social assistance					
Medical and Other Health Care Services	56%	59%	63%	66%	70%
Rental, hiring and real estate services					
Property Operators and Real Estate Services	28%	39%	53%	66%	80%
Public administration and safety					
Public Administration	4%	21%	43%	64%	85%
Information media and telecommunications					
Internet Publishing and Broadcasting	4%	20%	40%	60%	80%
Internet Service Providers, Web Search Portals and Data Processing Services	4%	20%	40%	60%	80%
Administrative and support services					
Administrative Services	66%	71%	78%	84%	90%

Source: ABS 8165.0, Economic Associates estimates

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

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

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

Table 5.7 below highlights that total employment within commercial office space in the Caboolture West catchment is projected to increase from 50 persons in 2012 to 1,833 persons in 2046.

Table 5.7: Projected Employment within Commercial Office Space, Caboolture West Catchment, 2012-2046

	Employing Businesses								Non-Employing Businesses								Total Employment							
	2012	2016	2021	2026	2031	2036	2041	2046	2012	2016	2021	2026	2031	2036	2041	2046	2012	2016	2021	2026	2031	2036	2041	2046
Financial and insurance services																								
Finance	-	1	4	14	32	46	57	62	-	1	3	11	24	34	42	47	1	2	7	24	55	80	99	109
Insurance and Superannuation Funds	1	2	8	26	59	84	105	115	1	2	7	20	44	63	78	86	2	4	15	46	103	147	183	202
Auxiliary Finance and Insurance Services	1	2	6	17	32	47	58	64	1	2	5	13	24	35	43	48	2	3	11	30	57	82	101	112
Financial and Insurance Services, nfd	-	-	-	1	2	3	4	4	-	-	-	1	2	2	3	3	-	-	-	1	4	5	6	7
Professional, scientific and technical services																								
Professional, Scientific and Technical Services, nfd	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	12	15	41	101	189	271	337	371	4	4	9	17	24	34	42	46	16	20	49	118	212	305	379	418
Computer System Design and Related Services	4	5	13	29	44	63	78	86	1	1	3	5	5	8	10	11	5	7	16	34	49	71	88	97
Health care and social assistance																								
Medical and Other Health Care Services	6	9	30	87	180	259	322	355	2	3	9	22	39	56	69	76	8	13	40	109	219	315	391	431
Rental, hiring and real estate services																								
Property Operators and Real Estate Services	3	5	17	51	110	158	196	216	4	4	8	13	14	20	24	27	7	9	25	65	123	177	220	242
Public administration and safety																								
Public Administration	-	1	6	20	46	66	81	90	2	2	4	6	4	6	7	8	3	3	10	26	50	71	89	98
Information media and telecommunications																								
Internet Publishing and Broadcasting	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Internet Service Providers, Web Search Portals and Data Processing Services	-	-	-	1	2	3	3	4	-	-	-	-	-	-	-	-	-	-	-	1	2	3	4	4
Administrative and support services																								
Administrative Services	5	6	15	33	55	79	98	108	1	1	2	3	3	4	5	6	6	7	17	37	58	83	103	114
Total	33	47	141	380	749	1,078	1,338	1,474	17	21	50	111	182	262	325	359	50	68	191	491	931	1,340	1,663	1,833

Source: Economic Associates estimates

5.3.3 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 for 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.

Based on these assumptions, total commercial office floor space demand is projected to increase from 1,088m^2 in 2012 to 36,562m^2 in 2046.

Table 5.8 below summarises the estimated commercial office demand attributable to both employing and non-employing businesses within the Caboolture West catchment between 2012 and 2046.

Table 5.8: Projected Commercial Office Floor Space Demand (sqm), Caboolture West Catchment, 2012-2046

	Employing Businesses								Non-Employing Businesses								Total Commercial Office Demand							
	2012	2016	2021	2026	2031	2036	2041	2046	2012	2016	2021	2026	2031	2036	2041	2046	2012	2016	2021	2026	2031	2036	2041	2046
Financial and insurance services																								
Finance	7	17	70	237	555	798	991	1,092	12	25	100	321	714	1,026	1,274	1,404	19	42	170	558	1,269	1,825	2,265	2,496
Insurance and Superannuation Funds	18	37	140	453	1,025	1,475	1,830	2,018	29	55	201	614	1,318	1,896	2,353	2,594	47	92	341	1,067	2,343	3,370	4,184	4,612
Auxiliary Finance and Insurance Services	16	32	107	294	568	817	1,014	1,118	26	48	153	399	730	1,051	1,304	1,437	42	80	260	693	1,299	1,868	2,318	2,555
Financial and Insurance Services, nfd	-	-	3	12	35	51	63	70	-	-	4	17	45	65	81	89	-	1	6	29	81	116	144	159
Professional, scientific and technical services																								
Professional, Scientific and Technical Services, nfd	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	214	270	711	1,769	3,301	4,748	5,894	6,497	117	125	261	505	707	1,018	1,263	1,392	331	395	972	2,274	4,009	5,766	7,157	7,889
Computer System Design and Related Services	67	90	229	505	767	1,103	1,370	1,510	37	42	84	144	164	236	294	324	104	132	313	649	932	1,340	1,663	1,833
Health care and social assistance																								
Medical and Other Health Care Services	98	163	532	1,527	3,153	4,535	5,629	6,205	67	98	274	667	1,158	1,666	2,068	2,279	165	261	806	2,194	4,311	6,201	7,697	8,484
Rental, hiring and real estate services																								
Property Operators and Real Estate Services	54	91	304	900	1,917	2,757	3,422	3,772	121	123	236	393	411	591	733	808	175	214	540	1,293	2,327	3,347	4,155	4,580
Public administration and safety																								
Public Administration	4	21	103	352	798	1,148	1,425	1,571	70	68	120	172	121	174	216	238	74	90	223	523	919	1,322	1,640	1,808
Information media and telecommunications																								
Internet Publishing and Broadcasting	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Internet Service Providers, Web Search Portals and Data Processing Services	-	-	1	9	34	49	61	67	-	-	2	5	7	11	13	14	-	-	3	15	42	60	74	82
Administrative and support services																								
Administrative Services	90	108	261	583	957	1,377	1,709	1,884	39	37	65	97	91	131	163	179	130	146	326	680	1,048	1,508	1,872	2,063
Total	570	830	2,462	6,643	13,111	18,858	23,408	25,803	518	623	1,498	3,334	5,468	7,864	9,761	10,760	1,088	1,453	3,960	9,976	18,579	26,722	33,169	36,562

Source: Economic Associates estimates

6 INDICATIVE PROVISION OF COMMUNITY FACILITIES

This section provides an overview of indicative levels of community facilities provision required to support a build out population of the Caboolture West catchment of approximately 60,000 persons. This does not constitute a detailed assessment, but is provided to inform Council of the quantum of community facilities that may need to be provided to support the Caboolture West MPA. Opportunities exist for community facilities to be integrated or co-located with centre activities to establish 'true' activity centres.

Table 6.1 below estimates the required provision of facilities in the Caboolture West catchment based on social planning thresholds set out in the Queensland Government (2007) Social Infrastructure Planning Implementation Guideline has been applied. Where the Queensland Government guidelines do not provide guidance, thresholds from alternative guidelines have been utilised. For the purpose of this assessment where a range is given the midpoint has been applied.

The population of the Caboolture West catchment is projected to increase from 3,622 persons in 2012 to 60,000 persons in 2046, or by an additional 56,378 persons. By 2046, indicative demand for community facilities would be in the order of:

- 57 community aged care packages;
- 115 aged high care beds;
- 138 aged low care places;
- One aged care service/respite centre;
- Two ambulance stations;
- Eight before and after school care centres;
- Ten child care centres'
- Two community health centres;
- Two fire and rescue stations;
- One indoor leisure centre;
- Three kindergartens;
- One multi-purpose community centre;
- Seven multi-purpose halls;
- Two neighbourhood community centres;
- Two police stations;
- 12 post offices;
- Eight primary schools;
- Three secondary schools;
- 643 social housing dwellings;

- 12 sports centres;
- One TAFE campus; and
- One youth centre.

Table 6.1: Social Infrastructure Provision, Caboolture West Catchment, 2012 to 2046

Facility Type	Assumption (1:x persons)	2012	2016	2021	2026	2031	2036	2041	2046
Aged Community Aged Care Packages (CACPs) [1]	20 CAP's/1,000 aged 70+	5	5	10	20	29	42	52	57
Aged High Care (Nursing home) beds[1]	40 beds/1,000 aged 70+	10	10	21	40	58	84	104	115
Aged Low Care (Hostel) places[1]	48 places/1,000 aged 70+	12	12	25	49	70	100	125	138
Aged Care Service/Respite Centre	60,000	-	-	-	-	-	-	-	1
Ambulance Station[1]	25,000	-	-	-	-	1	1	2	2
Art Gallery	90,000	-	-	-	-	-	-	-	-
Before and After School Care[1]	7,500	-	-	1	2	4	5	7	8
Central Library[1]	100,000	-	-	-	-	-	-	-	-
Child Care Centre (long day care)	600 aged 0-4 years	-	-	1	3	5	7	9	10
Civic Centre	65,000	-	-	-	-	-	-	-	-
Community Health Centre	25,000	-	-	-	-	1	1	2	2
Community Health Precinct	200,000	-	-	-	-	-	-	-	-
Convention Centre[1]	100,000	-	-	-	-	-	-	-	-
Council Offices[1]	no fixed standard	-	-	-	-	-	-	-	-
Courts[1]	75,000	-	-	-	-	-	-	-	-
Family Services Centre[1]	no fixed standard	-	-	-	-	-	-	-	-
Fire and Rescue Station[1]	25,000	-	-	-	-	1	1	2	2
Golf Club[1]	no fixed standard	-	-	-	-	-	-	-	-
Hospital[1]	no fixed standard	-	-	-	-	-	-	-	-
Indoor Leisure Centre[1]	60,000	-	-	-	-	-	-	-	1
Kindergarten	16,000	-	-	-	1	1	2	3	3
Library	90,000	-	-	-	-	-	-	-	-
Multi-Purpose Community Centre	35,000	-	-	-	-	-	1	1	1
Multi-Purpose Hall	8,000	-	-	1	2	3	5	6	7
Museum	75,000	-	-	-	-	-	-	-	-
Neighbourhood Community Centre	25,000	-	-	-	-	1	1	2	2
Police Station	27,500	-	-	-	-	1	1	1	2
Post Office[1]	5,000	-	-	1	3	6	8	10	12
Primary School	7,500	-	-	1	2	4	5	7	8
Public Transport[1]	no fixed standard	-	-	-	-	-	-	-	-
Regional Community Care Hub	65,000	-	-	-	-	-	-	-	-
Religious Facilities[1]	no fixed standard	-	-	-	-	-	-	-	-
Secondary School	20,000	-	-	-	-	1	2	2	3
Social Housing[1]	3%	39	42	93	195	312	456	574	643
Sports Centre[1]	5,000	-	-	1	3	6	8	10	12
Sports Fields[1]	no fixed standard	-	-	-	-	-	-	-	-
Supported (Emergency) Accommodation[1]	100,000	-	-	-	-	-	-	-	-
Swimming Pool[1]	no fixed standard	-	-	-	-	-	-	-	-
TAFE Campus	50,000	-	-	-	-	-	-	1	1
University[1]	150,000	-	-	-	-	-	-	-	-
Youth Centre	35,000	-	-	-	-	-	1	1	1

Source: Beaudesert Shire Council (2007) Office of Urban management, Department of Infrastructure (2007) and Table 2.3
Note 1: The Office of Urban Management guidelines were not used.

7 INDICATIVE CENTRE HIERARCHY SCENARIOS

Based on a build out population of approximately 60,000 persons, the Caboolture West MPA would be able to support a relatively large network of centres.

Analysis contained within section 4 (retail), section 5 (commercial office) and section 6 (indicative community facilities provision) informed the formulation of the centre hierarchy scenarios for the Caboolture West area outlined in this section.

A range of centre types are contemplated across the scenarios including:

- Major Centre(s);
- District Centre(s);
- Local Centre(s); and
- Neighbourhood Centre(s).

Table 7.1 below summarises the indicative parameters of the above centre types. Centres may vary relative to the parameters outlined in Table 7.1 in recognition that each centre is likely to fulfil a slightly different role and function within its respective catchment.

Table 7.1: Centre parameters utilised for centres network

Parameter	Major Centre	District Centre	Local Centre	Neighborhood Centre
Place type	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	>7.5km radius	~ 5km radius	~2km radius	~0.5 km radius
Retail	~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	>5,000m^2	2,000m^2-5,000m^2	500m^2-2,000m^2	<500m^2
Community	Examples include: • Long day care; • Place of worship; • Medical /health centre; • Indoor recreation; • Schools; • Arts hub.	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.

7.1 Centre Hierarchy Scenarios

Four centre hierarchy scenarios have been identified, namely:

- Scenario 1: Centrally located District Centre supported by Local and Neighbourhood Centres;
- Scenario 2: Highway based District Centre supported by Local and Neighbourhood Centres;
- Scenario 3: Centrally located Major Centre supported by Local and Neighbourhood Centres; and
- Scenario 4: Highway based Major Centre supported by Local and Neighbourhood Centres.

7.1.1 Scenario 1: Centrally located District Centre supported by Local and Neighbourhood Centres

Scenario 1 represents a centres network led by a **District Centre** located centrally within the Caboolture West MPA, supported by **six local centres** and **at least seven neighbourhood centres**. With regards to the provision of neighbourhood centres it is likely that the catchment would be able to support additional neighbourhood centres, but this would be influenced by the ultimate settlement patter of the MPA.

Central location of District Centre

The indicative location of the District Centre assumes generally direct access to the centre can be provided via Bellmere Road and a north-south arterial connecting the District Centre to the D'Aguilar Highway.

The central location would effectively anchor the centre as the civic heart of the MPA. Alternative locations either further east, or on the D'Aguilar Highway tends to undermine the District Centre's ability to serve the MPA without undermining or directly competing with existing higher order centres.

Additionally, a District Centre centrally located in a greenfield location (as opposed to abutting a highway) would provide greater opportunity to include residential components within the centre.

Local Centres

Six local centres have been identified in indicative locations such that they are located centrally within sub-catchments within the MPA. These general locations would allow weekly needs of households within these sub-catchment to be met by a local centre.

Local centres have been indicatively placed along existing road corridors. These road corridors may ultimately become unsuitable due to road realignments.

Neighbourhood Centres

Neighbourhood centres have been indicatively located to fill gaps between local centre catchments. This scenario identifies seven neighbourhood centres, but there is likely to be sufficient demand to accommodate a greater number.

7.1.2 Scenario 2: Highway based District Centre supported by Local and Neighbourhood Centres

Scenario 2 represents a centres network led by a **District Centre** located adjacent to the D'Aguilar Highway, supported by **six local centres** and **at least six neighbourhood centres**.

Highway location of District Centre

The main benefit of locating the District Centre along the D'Aguilar Highway is the potential to reduce infrastructure costs. It does not represent a preferred location in terms of meeting the long term needs of the MPA. The D'Aguilar Highway is also likely to sever or impose access limitations on any District Centre. The location of major centre facilities adjacent or abutting to the D'Aguilar Highway may be inconsistent with Department of Transport & Main Roads long term planning. Additionally, such a location may limit the potential for residential development within the centre.

Local Centres

Six local centres have been identified in indicative locations such that they are located centrally within sub-catchments within the MPA. These general locations would allow weekly needs of households within these sub-catchment to be met by a local centre.

Local centres have been indicatively placed along existing road corridors. These road corridors may ultimately become unsuitable due to road realignments.

Neighbourhood Centres

Neighbourhood centres have been indicatively located to fill gaps between local centre catchments. This scenario identifies six neighbourhood centres, but there is likely to be sufficient demand to accommodate a greater number.

7.1.3 Scenario 3: Centrally located Major Centre supported by Local and Neighbourhood Centres

Scenario 3 represents a centres network led by a **Major Centre** located centrally within the Caboolture West MPA, supported by **four local centres** and at least **six neighbourhood centres**.

Centrally located Major Centre

The indicative location of the Major Centre assumes the availability of generally direct access to the centre via Bellmere Road (or a potentially new arterial road) and a north-south arterial connecting the Major Centre to the D'Aguilar Highway.

The central location would effectively anchor the centre as the civic heart of the MPA. Alternative locations either further east, or on the D'Aguilar Highway tend to undermine the District Centre's ability to serve the MPA without undermining or directly competing with existing higher order centres.

As identified for Scenario 1 a District Centre centrally located would provide greater opportunity to include residential components within the centre.

The development of a Major Centre would limit the number of Local Centres provided within the MPA to four local centres. This is because under this Scenario centre uses are concentrated in a higher order centre.

Local Centres

Four local centres have been identified in indicative locations such that they service as much of the MPA as possible. Under this scenario service coverage by local centres would be poorer than in Scenario 1 and Scenario 2.

Local centres have been indicatively placed along existing road corridors. These road corridors may ultimately become unsuitable due to road realignments.

Neighbourhood Centres

Neighbourhood centres have been indicatively located to fill gaps between local centre catchments. This scenario identifies seven neighbourhood centres, but there is likely to be sufficient demand to accommodate a greater number.

7.1.4 Scenario 4: Highway based Major Centre supported by Local and Neighbourhood Centres

Scenario 4 represents a centres network led by a **Major Centre** located adjacent to the D'Aguilar Highway, supported by **four local centres** and **at least six neighbourhood centres**.

Highway location of Major Centre

The location of a Major Centre adjacent to the D'Aguilar Highway is undermined by similar factors as those relating to Scenario 2. The establishment of a Major Centre adjacent to the D'Aguilar Highway is unlikely to be sustainable given the significant impact such a centre would have on the highway operation.

The development of a Major Centre would limit the number of Local Centres provided within the MPA to four local centres. This is because under this Scenario centre uses are concentrated in a higher order centre.

Local Centres

Four local centres have been identified in indicative locations such that they service as much of the MPA as possible. Under this scenario service coverage by local centres would be poorer than in Scenario 1 and Scenario 2.

Local centres have been indicatively placed along existing road corridors. These road corridors may ultimately become unsuitable due to road realignments.

Neighbourhood Centres

Neighbourhood centres have been indicatively located to fill gaps between local centre catchments. This scenario identifies seven neighbourhood centres, but there is likely to be sufficient demand to accommodate a greater number.

Figure 7.1:Scenario 1-Centrally located District Centre supported by Local and Neighbourhood Centres

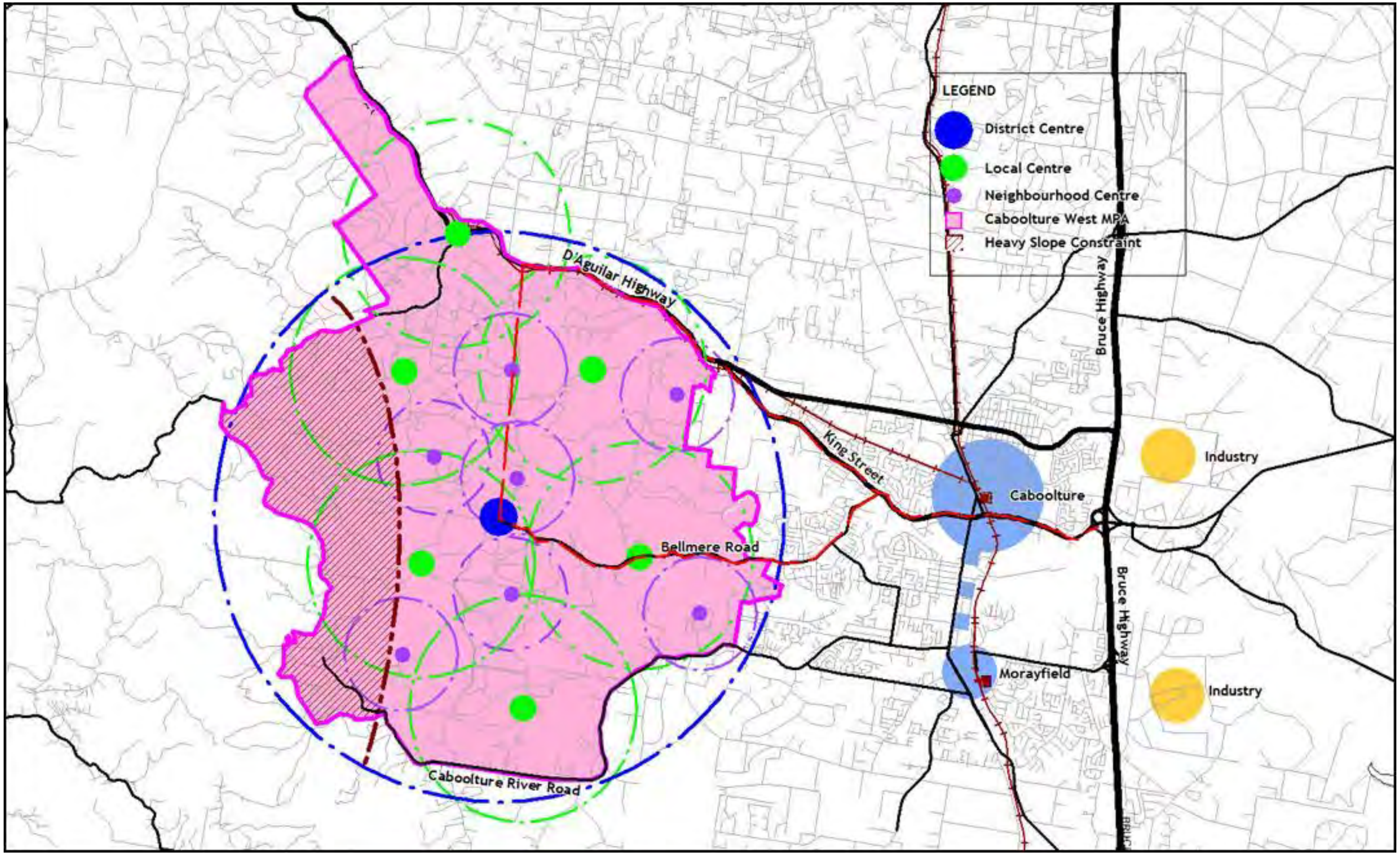


Figure 7.2: Scenario 2-Highway based District Centre supported by Local and Neighbourhood Centres

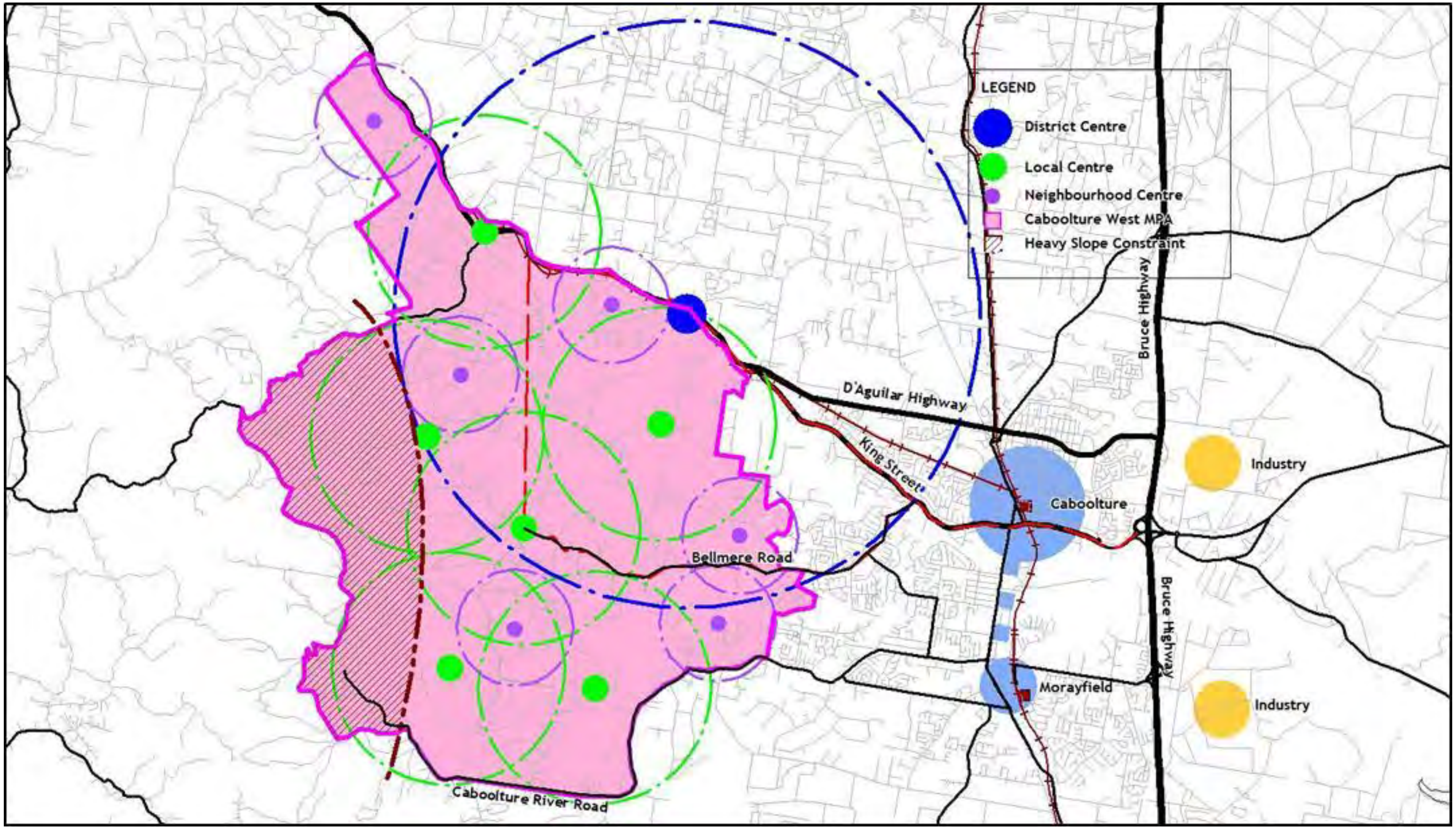


Figure 7.3:Scenario 3-Centrally located Major Centre supported by Local and Neighbourhood Centres

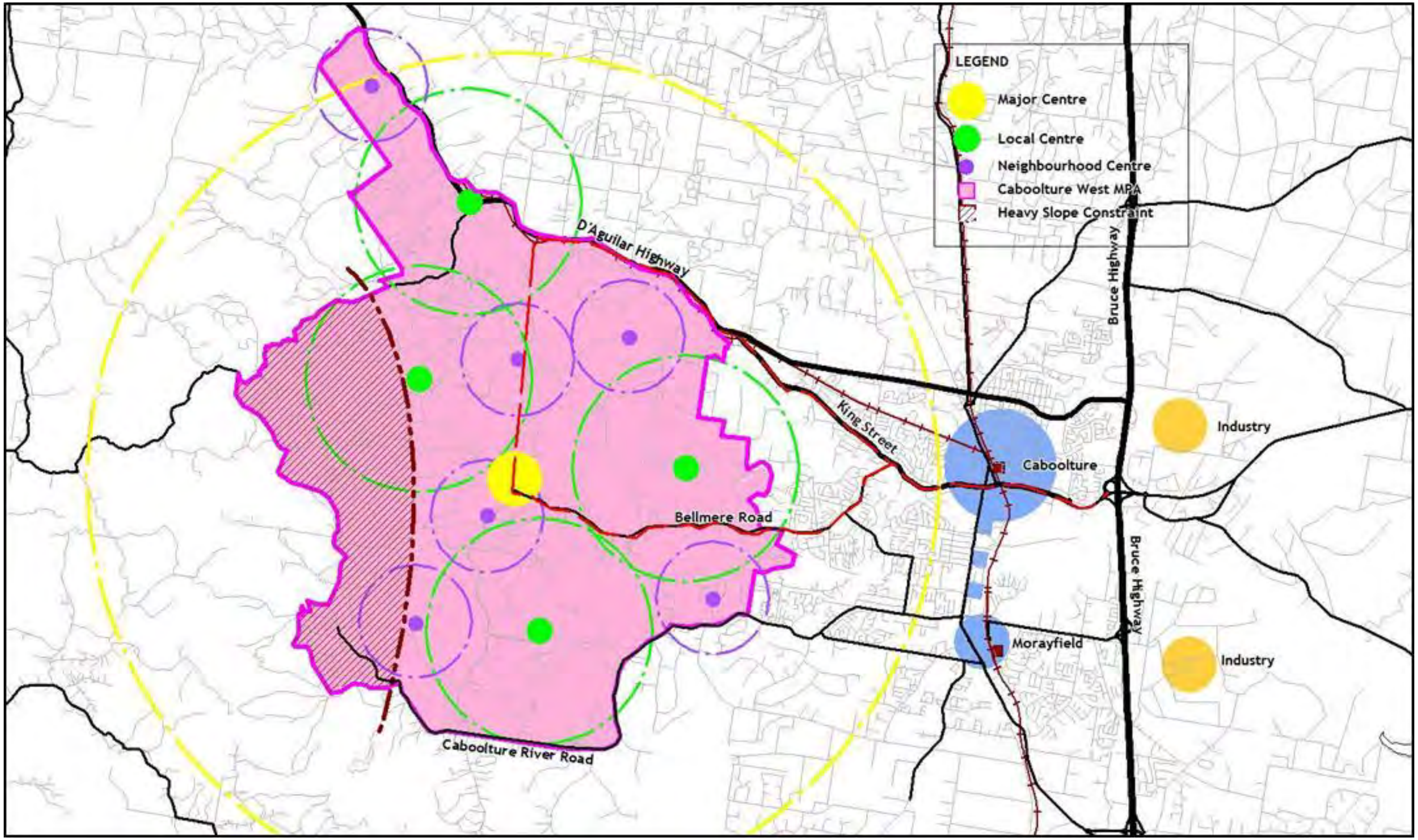
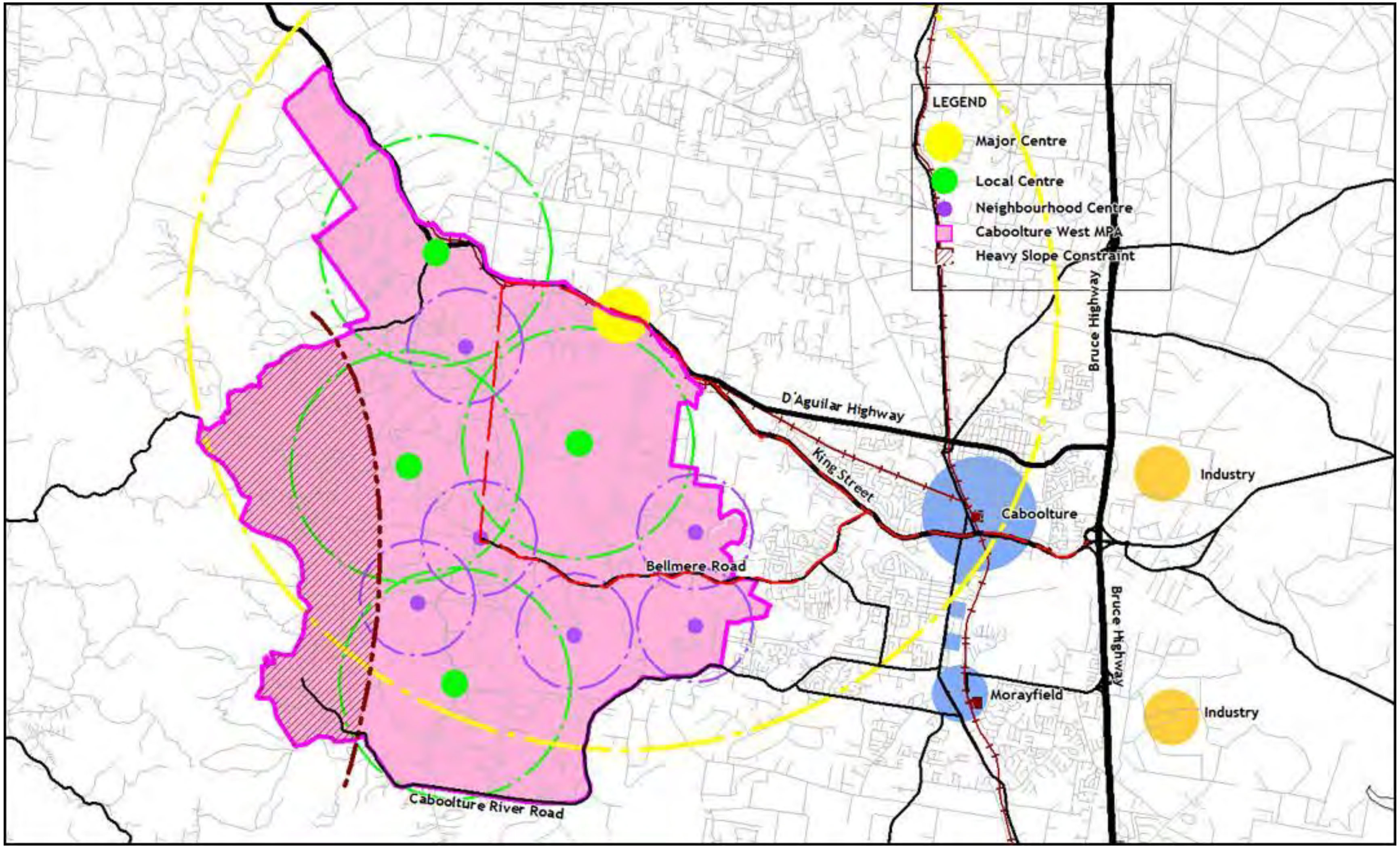


Figure 7.4: Scenario 4-Highway based Major Centre supported by Local and Neighbourhood Centres



7.2 Preferred Option

The preferred option is Scenario 1: Centrally located District Centre supported by Local and Neighbourhood Centres. The key favourable attributes of Scenario 1 include:

- Centrally located higher order centre;
- Broader distribution of lower order and convenience based centres;
- Greater focus on meeting convenience based needs ahead of establishing a higher order comparison-based shopping centre;
- Greater ability to establish community based nodes through co-location or integration of of community facilities with retail and commercial activities; and
- Enhanced walkability.

Generally speaking, the centre hierarchy scenarios (i.e. scenarios 2 and 4) based on establishing a higher order centre on the D'Aguilar Highway would risk the dissection centre activities by the highway which would result in an increased reliance on private vehicles to move within the centre. Additionally, the highway based location would do little to establish an identifiable retail/commercial heart to the emerging Caboolture West community.

The centre hierarchy scenarios anchored by the establishment of a Major Centre (i.e. scenarios 3 and 4) would result in a less dispersed and hence more car reliant centres network. The provision of a Major Centre within Caboolture West would come at the cost of two Local Centres and at least one Neighbourhood Centre. Based on the centres hierarchy framework outlined in Table 7.1, Local Centres and Neighbourhood Centres are intended to meet daily and weekly needs. Hence, the establishment of a Major Centre would in effect be seeking to trade-off 'everyday' convenience in favour of higher order 'comparison' needs which occur at a much lower frequency (i.e. fortnightly or monthly). Additionally, there would be some level of risk that the establishment of a Major Centre within such close proximity to the Caboolture Morayfield PAC could undermine the PAC.

While it might be argued that 'capping' the centres hierarchy with a District Centre might limit the commercial attractiveness of developing the MPA's highest order centre; in reality only a very small number of centre developers might be discouraged (most likely Westfield and Lend Lease). The number of centre developers active in the development or operation of centres of a District Centre scale remains significant (For example, Stockland, Mirvac, Charter Hall, Yu Feng/Retail First, Centro, Brookfield, Dexus to name a few).

Scenario 1 places a high degree of emphasis on Local Centre. This is because these centres have the potential to meet both 'everyday' and weekly needs as well as provide a range of community facilities. From a commercial perspective, Local Centres (as defined in Table 7.1) are among the most frequently prospected centres by centre developers.

Hence, it is considered that Scenario 1 affords a balance between Council's objectives to enhance walkability through a dispersed centres hierarchy and the commercial considerations of centre developers.

8 PLANNING CONSIDERATIONS

8.1 Background

Having identified a preferred centres hierarchy for the Caboolture West MPA based on an assessment of future community needs, it is necessary to ensure issues of statutory compliance, alignment and composition are observed to ensure a consistent statutory planning implementation framework.

To date it is our perception that he methodology employed in the preparation of the Moreton Bay Regional Planning Scheme (MBRCPS) has deliberately attempted to:

- adopt a regional interpretation of the SEQ Place Model (SPM) by interpreting and applying the Desired Regional Outcomes (DROs) of the SEQ Regional Plan at a strategic level in respect of individual place types under the SEQ Place Model;
- 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).

While the SEQ Regional Plan seeks to emphasis a network based approach to 'Activity Centres', the QPP mandate 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

Hence, the QPP principally caters for activity centres with a primary retail and/or commercial focus. Recognising this tension, this study has been limited to informing the future need for retail and commercial services in terms of a recommended hierarchy of Activity Centres. Having said this, section 6 has sought to highlight an additional dimension of activities that would most commonly be sought in a 'true' Activity Centre, namely community facilities.

In considering the range of statutory issues associated with the delivery of Activity Centres, we have identified a range of implementation recommendations relating to the future statutory planning of the Caboolture West MPA centres hierarchy.

8.2 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).

8.3 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.

8.4 Zones and Precincts

It is recommended that the QPP compliant activity centres hierarchy approach recommended in section 7.2 is adopted.

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 highway based Local Centre and the internally located Local Centres.

In the circumstance that Council seeks to establish industrial activities within the Caboolture West MPA and include these areas under a broader activity centres network, we would recommend utilisation of the Innovation Zone and/or Specialised Centre Zones under the QPP to give practical effect to this outcome. This may be particularly relevant to recognise the importance of industry and agri-business activities located adjacent to the D'Aguilar Highway.

8.5 Urban Structure Plans versus Local Plans

We would recommend that detailed planning of the Caboolture West MPA be delivered in a statutory sense as Local Plans in order to comply with Part 7 of the QPP. This is not to say that structure planning activities be abandoned rather that structure plans would need to be translated into a series of Local Plans. This may also assist in facilitating staging of the Caboolture West MPA.

8.6 Codes

The QPP provides that every Zone has a Zone Code. Centre Zone Codes are therefore required for each centre zone under the recommend Centres hierarchy namely the:

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

However, as stated above should Council consider it appropriate to include industry and agri-business clusters within a broader centres hierarchy we would recommend utilisation of the Innovation Zone and/or Specialised Centre Zones.

It is recommended that a degree of discipline be 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.

8.7 Staging

Section 7 identifies a preferred centres hierarchy option, along with three alternative options. These options have been developed based on a built out population of 60,000 persons. The sustainability of a centres hierarchy will be heavily influenced by the achieved built out population. Similarly, the delivery of the centres hierarchy will be staged over time. For example, it is unlikely that a District Centre would be developed in the early stages of the MPA's development. It also follows that centres activities may commence initially at one of the Local Centre sites, as opposed to the District Centre site.

The delivery of the centres hierarchy will be heavily influenced by the settlement pattern of the MPA over time. The settlement pattern will be determined by a range of factors including:

- Availability of infrastructure;
- Sub-regional residential market conditions;
- Business strategy of major land holders (e.g. willingness to pay bring forward costs of infrastructure); and
- Local and state government infrastructure plans, etc.

As stated above, we would recommend the development of Local Plans as the statutory planning instrument to guide development within the MPA. We would recommend that these Local Plans provide guidance with pertaining to the staging of centres' delivery having regard to the preferred 'roll out' of residential development within the MPA.

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