



MORETON BAY RURAL AREAS STRATEGY

FINAL STRATEGY REPORT

May 2012 (Revised January 2013)

DEVELOPMENT PROCESSES
STRATEGIC PLANNING
SPECIALIST PLANNING

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TABLE OF CONTENTS

EXECUTIVE SUMMARY	1
1.0 INTRODUCTION	12
1.1 The Brief	12
1.2 The Project Team	12
1.3 Approach, Methodology and Process.....	12
1.4 The Study Area	13
1.5 This Report	13
2.0 POLICY AND PLANNING CONTEXT	14
2.1 Overview	14
2.2 Key Legislative and Policy Settings	14
2.2.1 Sustainable Planning Act 2009 and QPP.....	14
2.2.2 State Planning Policies.....	14
2.2.3 Regional Context.....	17
2.2.4 Local Context.....	19
2.3 Councillor Consultation.....	26
2.4 Future Directions	26
2.4.1 Draft Woodfordia Rural Precinct Plan	26
2.4.2 Draft Moreton Bay Planning Scheme – Draft Strategic Framework (Confidential) .	27
2.4.3 Review of Rural Residential Areas.....	28
2.5 Key Findings of Policy and Planning Context Review	28
2.5.1 Implications of the State and Regional Context	28
2.5.2 State Planning Policies.....	28
2.5.3 Implications of the Moreton Bay context	29
2.6 Considerations for the New Planning Scheme	30
3.0 DETAILED ASSESSMENTS	31
3.1 Introduction / Overview	31
3.2 Rural Land Assessment.....	31
3.2.1 Overview.....	31
3.2.2 Information Reviewed.....	32
3.2.3 Synopsis of Rural Industries in Moreton Bay	32
3.2.4 Key Emerging Rural Land Issues.....	39
3.3 Residential and Housing Assessment	39
3.3.1 Objectives and Approach	39
3.3.2 Policy and Spatial Framework.....	42
3.3.3 Existing Demographic and Housing Characteristics	44
3.3.4 Estimate of Dwelling Demand	50
3.3.5 Estimate of Residential Land Supply.....	56
3.3.6 Spatial Distribution of Residential Growth and Estimate of Land Capacity.....	58

3.4	Ecological, Scenic and Open Space Assessment.....	62
3.4.1	<i>Ecological Review</i>	62
3.4.2	<i>Scenic Amenity and Landscape Character</i>	67
3.5	Economic and Employment Assessment	72
3.5.1	<i>Introduction</i>	72
3.5.2	<i>Centres Review</i>	73
3.5.3	<i>Summary of Centres</i>	80
3.5.4	<i>Socio-Demographic and Socio-Economic Attributes</i>	81
3.5.5	<i>Prominent Industry Sectors and Major Employers</i>	83
3.5.6	<i>Current and Future Employment Structure and Recommendations</i>	85
3.5.7	<i>Exploring Economic Development Opportunities</i>	86
3.6	Infrastructure and Water Cycle Implications	86
3.6.1	<i>Overview</i>	86
3.6.2	<i>Water Cycle</i>	87
3.6.3	<i>Acts, Regulations and Policies</i>	98
3.7	Summary of Outcomes / Emerging Issues	98
3.7.1	<i>General Issues</i>	98
3.7.2	<i>Economic Issues</i>	99
3.7.3	<i>Housing Issues</i>	100
4.0	RURAL LANDS STRATEGY	104
4.1	Overview	104
4.2	The Role of the Planning Scheme	104
4.3	The Role, Function and Character of Rural Areas and Townships	105
4.4	Overarching Strategies	105
4.4.1	<i>Residential Strategy</i>	105
4.4.2	<i>Employment and Economic Strategy</i>	106
4.4.3	<i>Biodiversity and Open Space Strategy</i>	107
4.4.4	<i>Infrastructure Strategy</i>	111
4.5	Use of Place Types in the New Planning Scheme	112
4.6	Planning Strategies by Place Type	113
4.6.1	<i>Introduction</i>	113
4.6.2	<i>Townships</i>	113
4.6.3	<i>Rural Residential Areas</i>	118
4.6.4	<i>Ranges</i>	120
4.6.5	<i>Tablelands</i>	121
4.6.6	<i>Hills</i>	122
4.6.7	<i>Foothills</i>	123
4.6.8	<i>Uplands and Low Hills</i>	123
4.6.9	<i>Undulating Plains</i>	124
4.6.10	<i>Inland Valleys and Streams</i>	125

4.6.11 Alluvial Plains	125
4.6.12 Acid Sulphate Areas	126
4.6.13 Key Resource Areas.....	126
4.6.14 Water Supply Catchments.....	127

APPENDICES

Appendix A	Methodology
Appendix B	Rural Land Analysis (LRAM)
Appendix C	Housing Assessment (Buckley Vann)
Appendix D	Ecological, Scenic and Open Space Issues (Yurrah)
Appendix E	Centres and Economics Report (CChange)
Appendix F	Place Type Framework
Appendix G	Role and Function of Place Types

EXECUTIVE SUMMARY

Background and Context

In October 2011, Moreton Bay Regional Council ('Council') appointed a team comprising Buckley Vann Town Planning Consultants, LRAM, CChange, Yurrah and Bligh Tanner/BMT WBM to prepare a Rural Areas Strategy for Council's rural areas, to support the preparation of the Council's forthcoming new planning scheme being prepared under the *Sustainable Planning Act 2009* (SPA).

The purpose of the project was to address the principles and requirements of the SEQ Regional Plan (2009-2031 ('SEQ Regional Plan')) and the associated SEQ Rural Futures Strategy, with particular regard to:

- clearly identifying the role and function of the region's rural areas, including the rural townships in those rural areas;
- expanding and apply the concept of place types contained in the NGP handbook to the rural areas of Moreton Bay Region;
- identifying and describing the current and anticipated residential and employment structure of the various place types within the study areas;
- identifying opportunities to future develop rural enterprises particularly where they add value to existing and future primary production;
- recognising the role of biodiversity values and the natural environment and identifying opportunities to protect and restore these values in the study areas;
- identifying any 'rural precincts' (as provided for in the SEQ Regional Plan); and,
- providing recommended implementation strategies for future development which take into account strategic direction regarding the role and function of the rural study areas.

Following a preliminary assessment of the policy context, the study area was defined to include:

- all areas zoned rural or rural residential (or similar) within existing planning schemes (either Regional Landscape and Rural Production Area (RLRP) or Rural Living Area (RL) in the SEQ Regional Plan); and
- land in the Urban Footprint (UF) and RL designations in and around Samford, Dayboro, and Woodford.

Apart from land in townships, land in the urban footprint within the main urban areas was not included in the study.

The current local planning schemes, based on the previous local government areas, combine to form an inconsistent and now ageing planning framework for the study area.

While both the Pine Rivers and Caboolture schemes manage rural and rural residential land use issues, the Pine Rivers scheme provisions are based on an analysis of land characteristics to a greater extent than Caboolture. While the Pine Rivers approach provides a closer fit to the place types concept proposed in the draft Strategic Framework of the new planning scheme, its scope is limited to only about half of the study area.

Of significance is the lack of policy emphasis on rural and rural residential areas in current local planning and corporate documents. A fundamental requirement of the new planning scheme will be to:

- understand their varying roles in the MBRC place types; and
- ensure a consistent planning regime to address the underlying issues for rural areas, including rural residential development and rural land fragmentation.

In addition, the high level aspirations articulated through the corporate and community plans, while not specifically emphasising a vision for rural areas, imply a greater emphasis on sustainability as the basis for future plan-making.

The implications of the regional plan and State interests, and of identified local issues and aspirations, point to support for the approach proposed by the draft Strategic Framework as reviewed by the study. A place-based approach is most likely to recognise the diversity of characteristics across the study area, as long as it is based on clear and reliable information about constraints and opportunities.

A number of high level constraints illustrated by the context review, particularly ecological constraints and limits on future subdivision outside the Urban Footprint, establish clear directions for the new planning scheme, and rural areas and townships within them.

Communities of Interest

Four broad communities of interest were identified within the study area:

- Woodford and Surrounds;
- Dayboro and Surrounds;
- Samford and Surrounds; and
- Coastal Towns and Surrounds.

Each of these communities of interest has a unique identity and provides essential services to surrounding communities and smaller townships. These services include retail goods and services, cultural and community oriented infrastructure, recreational opportunities, government services and entertainment opportunities. The four communities of interest are identified spatially in **Sections 3.4**.

Bearing in mind Council's economic development strategies, the rural areas have some scope to assist in achieving economic development objectives. In particular, these are likely to be in the areas of tourism and events. However, the decline of traditional rural industries which has been identified in the rural assessment in this study is a significant problem for the rural areas. No significant employment initiatives which might replaced traditional industries are foreshadowed. A comprehensive economic development strategy is required which takes the rural areas into account.

The decline of traditional industries will mean a greater focus on the role of the townships to support employment and economic development in the rural areas.

The three townships of Woodford, Dayboro and Samford can be considered successful in terms of the mix of retail goods and services, service sector tenancies catering to the local market, physical factors / focal points which help to provide a community heart, good car parking and levels of attractiveness and safety.

They have a number of characteristics which can be built on to ensure they remain successful centres in life of the planning scheme and beyond. The study recommends a number of improvements to the centres to assist in consolidating the important role of the townships as economic drivers of the rural areas into the future.

Rural Land and Ecological Issues

The two main issues relating to rural land in the study area are:

- the decline in traditional primary industries and limited scope for new primary industries to replace them; and
- the increasing uptake of lifestyle living on existing fragmented rural lots, which can be expected to continue even without further subdivision.

Notwithstanding the extent of rural zoned land, traditional primary rural industries are, on the whole, declining. There is little scope for revitalisation of these industries, as most have lost their competitive advantage. Nevertheless, the high level of existing fragmentation has resulted in the potential for a continuing stream of residential development in most rural areas, including those which are remote from services and otherwise constrained.

On the basis of the review of characteristics, areas of broadly similar land resource values and issues and levels of fragmentation can be identified as a division of the area into:

- North – more traditionally rural-based, centred on Woodford;
- Central – a band of rural and rural residential areas centred on Dayboro, including various ecological values; and
- South – a more highly fragmented area, including coastal villages and areas with coastal values, and accommodating a greater concentration of rural living uses, attributable to proximity to urban areas and employment.

The coastal villages and surrounds are severely constrained by coastal processes, acid sulphate soils and lack of infrastructure. Accordingly, the study has considered these areas unsuitable for further development.

Overlaying these basic divisions of the rural landscape are a range of ecological and scenic values that broadly connect the inland areas of Moreton Bay with the coastal areas, and generally provide a framework for supporting biodiversity and landscape values in the whole Council area.

Overall, these key ecological and scenic amenity findings are as follows:

- ecosystem function of remnant vegetation (and certain areas of regrowth) within non-urban areas is protected under existing state legislation;

- the potential for strong north-south connectivity through the western extent of the study area is contingent on one or more of three partially fragmented corridors being viable and subject to a combined review of the Caboolture Shire linkages and Pine Rural Area corridors once the latter is available¹;
- sustainable connections to urban and coastal areas in the east are typically via the major and minor waterways, with stream health and condition (both within large rural holdings and through urban areas) being a significant factor in the success of the open space network;
- the current Scenic Amenity mapping and policies for the region, as imposed by the various state instruments, is inconsistent and flawed and needs to be updated. An LGA character study/classification should frame the further scenic amenity and visual amenity outcomes. Council's background work on scenic amenity confirms that:
 - “...the overlay mapping appears to be lacking in some areas on the coast and within the open space or nature conservation areas within the urban footprint”. For the purpose of either Guideline 8 or Queensland Coastal Plan to be furthered by an LGA Planning Scheme, the mapping needs to be accurate and consistent and the accompanying codes need to be practical and transparent (and clearly derived from the higher level planning tools, ie. the DEOs); and
 - that “while the Scenic Overlay mapping needs updating to allow for better assessment, the Scenic Amenity Overlay Code itself is flawed, and does not provide comprehensive trigger of assessment under the mapping”.

The new planning scheme will need strong strategic messages to ensure community expectations are adequately set. The ‘north, central and south’ framework could provide a basis for developing strategic outcomes for the proposed place-type model in the new planning scheme.

Centres and Employment Issues

Based on the research and analysis conducted as part of this report it is clear that Moreton Bay's rural centres – Woodford, Dayboro and Samford – are a highlight of the Region. The main rural centres are currently fulfilling roles that are conducive to their main catchment areas and can be described as successful rural towns/centres.

They each have a unique identity and a very strong sense of community. In varying capacities, each centre has:

- an appropriate mix of retail goods and services, with all centres placing a high value on customer service/experience;
- service sector tenancies that cater for the local market;
- are considered the cultural and community heart of the community to which they primarily serve;
- have key focal point/s for community meetings and events;
- include many appropriate community and government services;
- are attractive, safe and inviting and have recreation, leisure and (to varying degrees) entertainment opportunities;

¹ See recommendations in Section 4.

- are generally legible and safe and have a focus on placemaking (although some could be improved in this regard); and
- incorporate the area's broader history.

The tourism element of each of the centres could be improved, and the housing mix could be diversified to cater for aging or young adult households.

A summary of how each centre 'scored' in relation to the above dot points is listed in the report. In addition, improvements that would benefit the Centres are also noted. The improvements noted could be influenced through Local Area Plans for the Centres, and there may be some land use implications from arising actions.

Broad floorspace analyses conducted for the study indicated that there is ample floorspace at most of these centres now and into the future. Dayboro has some scope for increasing floorspace. Any additional floorspace would be best placed if directed towards tourism and non-essential food tenancies. For Woodford and Samford it is unlikely that more floorspace will be required at the Centres even at 2031. Overall, it is recommended that the centres' roles and floorspace remain as they were in 2012.

Potential Economic Development Opportunities

Much research and analysis was conducted for this report to determine the potential economic development opportunities for Moreton Bay's Rural Areas. All economic development opportunities explored kept Council's EDS vision in mind: foster[ing] a vibrant, sustainable and knowledge-driven economy that creates valuable employment for residents, protects the region's high quality of life and provides a prosperous future for all residents.

The framework utilised to determine potential opportunities for the rural areas included ensuring that:

- industry recommendations supported the principle of promoting profitable and sustainable rural industries;
- recommendations can assist Moreton Bay diversify its economic development base in a way that assists self contained;
- the skills and attributes of the workforce required to optimise the economic development opportunities in Moreton Bay are either present or are considered developable;
- the infrastructure required to ensure that opportunities can be maximised is planned or provided; and
- all recommendations made enhance and protect the vibrant lifestyle and unique identity of the Moreton Bay Rural Council.

The investigations completed clearly showed that Council needs to devote resources into developing economic development opportunities for Moreton Bay's Rural Areas if they wish to maintain, let alone increase employment in the region. This is particularly the case given the expected decline of the current rural industries (refer LRAM's report).

Recommendations for Council regarding economic development opportunities include investigating in detail the land use implications and opportunities associated with industries noted below:

- clean energy initiatives, both generally across the rural areas, and specifically to assist businesses in rural industries that are in decline. Land use implications are likely to be ensuring that appropriate areas can flexibility cater for clean energy initiatives;
- tourism initiatives, particularly focussing on: the main rural centres of Woodford, Dayboro and Samford; establishing further boutique bed and breakfasts, 'farm stays'; other rural experiences such as agro-eco-friendly tourism such as 'working farms or value adding'; potentially investigating the wine industry; and, growing the festivals and events market in the Region with a particular emphasis on lifestyle and rural events. Land use implications include ensuring that tourism operations can be operated in appropriate areas;
- the potential and likely success for the rural areas to host transport and logistics infrastructure (although as noted in the main body of the report, even if this sector is successful, the employment outcomes are not likely to be significant given low employment densities of such uses). Investigations into the location of further appropriate industrial land would be required;
- other opportunities associated with attracting FI/FO workers or the building manufacturing sector could also be investigated. However, as noted in the body of the report, major employment and economy gains to the rural areas are not expected unless there are considerable population increases (for FI/FO opportunity) or increases in industrial land (for building manufacturing sector).

In addition to the above it is recommended that Council consider:

- investigating appropriate types of home based businesses and their requirements;
- developing a Tourism Strategy for the Rural Areas, and linking this to the broader Moreton Bay Region. The Strategy would need to determine key markets and key attractions such that the focus on the identity and lifestyle attributes of Moreton Bay is preserved and enhanced;
- undertaking a Branding and Marketing Strategy for the rural areas, with an emphasis on the main Centres as well as other tourism attributes;
- develop the main Centres to reach their potential as suggested in the preceding section.

Current and Future Employment Structure

Section 3 outlines the current structure of Moreton Bay's rural areas in detail. In summary Woodford and surrounds employment base is focussed in agriculture and public administration and safety, and the other rural areas are more diverse. Dayboro and surrounds have a variety of sectors employing its residents including electricity, water and waste services and construction while Samford had more residents employed in professional, scientific and technical services, information media and telecommunications and financial and insurance services. The Coastal areas had a mix of many industries.

LRAM's report shows that the rural sector that currently underpins Moreton Bay Region's Rural Areas, and particularly Woodford and surround's economy, is in decline and future prospects for this sector seem bleak. A decline in the employment opportunities for the rural sector would substantially change the employment structure of the rural areas – particularly Woodford. Unless significant employment prospects are provided, the best case scenario is that many of the employed residents in the rural areas will need to secure jobs in the urban areas of Moreton Bay, and the worst case scenario is that unemployment will increase.

Analysis of the 2006 ABS Census 'occupation by age group' also adds a compounding issue for the rural areas. In 2006 a high proportion of people in various occupations, particularly managers in Woodford (which are likely to be managers of agricultural operations) were over the age of 55. Given that the 2006 Census is now 5 years old, it is likely that a high proportion of these people are either retired or close to retiring. If the rural areas cannot attract people to replace these retirees, then further impacts on the employment base will result. In addition, the ageing of the population in the rural areas is likely to have considerable impact on the demand for social and community services.

Given the above trends and likely results, it is recommended that:

- Council complete a social and community needs assessment for the Rural Areas;
- verification of the 2011 employment structure of the rural areas is undertaken when the 2011 ABS Population and Household Census data is released;
- accessibility between Council's rural areas and urban employment nodes is maximised; and, importantly;
- Council place a high value on completing a comprehensive economic development strategy for the Rural Areas of Moreton Bay such that the likely decline in employment opportunities can be replaced and further employment opportunities be provided.

In conclusion, there are many strengths associated with Moreton Bay Region's rural areas. The main centres are highlights of the region and there are opportunities to strengthen these further. The main centres' tourism components could be further capitalised upon and the placemaking focus emphasised. If this was to occur, further value to the economy of the rural areas could result.

Housing and Capacity Issues

The residential assessment has considered the supply of and demand for housing within Moreton Bay's rural townships. The assessment has been based on Council's expressed preference of directing a greater proportion of residential growth into Urban Footprint areas and achieving a broader range of housing options to match the needs of the population within them.

While this assessment indicates some potential shortfalls of residential land to support the preferred strategy, it is likely to be reduced by:

- the likelihood of uptake of housing on existing lots in the RLRPA;
- opportunities for infill within existing townships; and
- the potential for re-development and re-subdivision of existing housing stock.

The assessment does not draw a conclusion on the optimum extent of growth which might ultimately be sought for each town. Nevertheless, the assessment does point to the requirement for more detailed local area planning to examine opportunities and constraints, and to establish appropriate local strategies to accommodate future housing needs.

Infrastructure Issues

- The existing road network has reasonable remaining capacity, however, significant growth in the investigation areas may require road upgrades. This may be expensive and resource intensive in areas such as the D'Aguilar Highway connection from Caboolture to Woodford.
- Environmental flows must be considered in future land use planning - any proposed growth or development in the communities of interest would need to demonstrate that the impact to receiving waters is very low.
- All Sewage Treatment Plants in MBRC have limits that significantly constrain discharge to receiving waters.
- Woodford, in particular, is subject to significant flood risk from the Stanley River.
- Further population growth in the Samford township would require detailed analysis of the capacity of the existing water and sewage networks. Further growth would likely incur significant infrastructure costs if existing pipelines needed to be upgraded. Adopting alternative water and wastewater strategies, such as local stormwater harvesting, wastewater recycling and reuse, may be able to support population growth in the face of these infrastructure constraints.
- The Coastal community of interest is severely constrained by infrastructure issues and potentially coastal process, making these areas unsuitable for significant development or growth.

Overall Strategy

Section 4 of this report outlines a strategy for rural areas with the following key policy directions for the new planning scheme:

- using a 'place types' approach to defining and presenting strategic policy directions;
- confirming the role of rural areas and townships in Moreton Bay in supporting rural industries and other economic development opportunities, providing housing and rural lifestyle opportunities in proximity to services and employment;
- directing future residential growth to the urban footprint in the three inland townships of Woodford, Dayboro and Samford and to a lesser extent, existing rural residential areas in the vicinity of those townships, within the urban footprint as first priority, and otherwise to within Rural Living designated areas;
- confirming the central role of the townships in economic development and employment self-containment – including in providing opportunities to develop tourism in particular, and other uses subject to further investigation;
- protecting the ecological and scenic values, identifying biodiversity corridors and linkages, and using these values to contribute to an urban break in the north of the Council area;
- protecting the unique character of townships and rural residential area using a 'visual diaries' approach to defining sensitive urban form;
- determining a local approach to establishing an offsets policy which is consistent with others in South East Queensland, based on further investigations suggested in the study; and
- where development cannot be connected to urban services, particularly outside the SEQ Urban Footprint, ensuring high standards of on-site sewage treatment.

Overarching strategies are provided as follows.

Residential Strategy

The planning scheme should direct a high proportion of residential growth to the three townships and existing rural residential areas in the vicinity of these centres. However, this will require more detailed investigation of local constraints and opportunities, and the balancing of the character and amenity of the towns with potential growth strategies.

Economic and Employment Strategy

The decline in rural industries means that rural townships are increasingly at the core of the economic health of the rural areas in the future. It is recommended that Council ensures the townships and centres are working optimally and alternative economic development opportunities are available in rural areas.

These are likely to include tourism initiatives based on the towns and farmstays and other initiatives providing a rural experience. Other opportunities including clean energy, maximising lifestyle for attracting fly-in fly-out (FIFO) workers, and transport and logistics, will require further investigation.

In addition, Council will need to develop a tourism strategy and a branding and marketing strategy.

Biodiversity and Open Space Strategy

The rural areas contain a range of ecological and scenic values which should be protected by the new planning scheme, including through mapping of values identified by this study. A number of considerations identified are:

- options for biodiversity corridors (north-south and east-west) and the contribution to connectivity provided by waterways and other values in urban areas must be considered in determining corridors;
- the existing rural production area north of Caboolture will need to be protected for its contribution to the north-south landscape transition and to continue the inter-urban break role identified in the current planning scheme; and
- the character and community identity of the towns and associated rural residential areas will depend on identification of sensitive urban form in these areas, based on understanding local features.

In addition, the study proposes an offsets strategy. This will require an understanding of the locally significant ecological features and functions that are not addressed by State of Commonwealth offsets functions. The report provides an approach to identifying locations for offsets.

Infrastructure Strategy

The projected growth in the townships will put considerable pressure on water cycle infrastructure and the environment. General strategies to manage these impacts will include:

- seeking to constrain development to the Urban Footprint;
- outside the urban footprint, specific approaches to managing water demand and treating sewage; and
- sewerage and water supply should not be extended to Rural Living areas.

Specific approaches are recommended for each township in this regard.

Place Types

The place type approach provides an accessible and easily understood framework for the planning scheme, particularly when supported by graphic materials. In general, for all place types, the following criteria are relevant.

- the rural areas will also continue to provide (i) considerable character and scenic amenity to the region's urban areas, as a green backdrop, and (ii) a framework for connectivity as the basis for the long-term protection of the region's biodiversity values and a balance between urban and non-urban uses;
- extractive resources on rural lands will continue to be protected for their value to the economy;
- coastal values will continue to be protected, and the impacts of natural hazards on human life and property will be minimised;
- the rural towns and villages will continue to support both the rural and urban areas of the region by:
 - supplying services and facilities to residents on rural properties;
 - contributing to employment self-containment and economic vitality;
 - providing a hub for community activity;
 - providing affordable and diverse housing choices, as an alternative to those in urban and rural areas; and
 - helping to define the unique character of the region.

The key directions for each place type are presented in terms of a planning response to identified conditions and characteristics. In summary, the suggested place types and their key policy directions are as follows.

Place Type	Planning Response
Townships <i>Woodford and D'Aguilar</i> <i>Dayboro</i> <i>Samford</i>	Local area planning to ensure land capacity, urban design, transitioning of rural residential to urban where possible, local conflicts can be addressed. Improving housing diversity to meet housing needs while maintaining character. Specific responses for individual townships.
Rural Residential <i>D'Aguilar RLA</i> <i>Ocean View RLA</i> <i>Samford Valley RLA</i>	Non-worsening of current level of fragmentation and its impacts. Direct new population to centres within urban footprint. Where possible, tighter controls on development on existing lots.
Ranges	Rehabilitation of former forest areas. Strong limits on development. Very limited range of rural uses with some small scale tourism. No further subdivision.

Place Type	Planning Response
Tablelands	Retain rural characteristics and support remaining dairying and grazing potential. Limited range of rural uses. Some recreation, small scale tourism uses. No further subdivision. Manage relationship with sensitive land uses near rural uses.
Hills	Retain as predominantly forest conservation areas. Small proportion included in Caboolture West Master Planned Area. Limit further clearing where possible particularly on ridges. Enhance conservation outcomes. Link to offsets strategy.
Foothills	Predominant use is rural, particularly sustainable grazing. Protect landscape characteristics particularly where they provide for east-west linkages. No further subdivision. Overlay provisions for bushfire.
Uplands and Low Hills	Predominant use is rural, particularly sustainable grazing. Rural living on existing lots. Provide for sustainable forestry and identify east-west biodiversity linkages. No further subdivision and controls on building where possible.
Undulating Plains	Predominant use is rural, particularly sustainable cropping and grazing. Large proportion is in the Caboolture West Master Planned Area. Possible use of an overlay to manage on-site and local impacts.
Inland Valleys and Streams	Predominant use is rural due to GQAL and flood, particularly for sustainable cropping, biodiversity and water quality enhancement. Identify east-west linkages. Limit further subdivision and non-rural development. Avoid areas of high biodiversity values, flooding or where suited to agriculture.
Alluvial Plains	Forestry areas to be predominantly rural, particularly for sustainable forestry. Rural living on existing lots. No further expansion of rural residential into this area. Limit development and further subdivision.
Acid Sulphate Areas	Maintain existing approach to management of ASS. Limit further subdivision. No expansion of coastal towns.
Key Resource Areas	Retain potential for existing and future extraction operations. Particular criteria for KRA 46. Link to offset strategy where possible.
Water Supply Catchments	Reinforce primary role as water supply catchments, similar to existing approaches, possibly using an overlay.

Section 4 also identifies a range of issues which are not likely to be able to be addressed by the planning scheme to any significant degree, including:

- redressing the decline of traditional rural industries;
- attracting new industries to replace employment; and
- limiting the development of dwellings in existing lots in the RLRPA.

The study makes a number of recommendations for possible action outside of the planning scheme in this regard.

1.0 INTRODUCTION

1.1 The Brief

In September 2011, Moreton Bay Regional Council ('Council') requested quotations for the prepare a Rural Areas Strategy for Council's rural areas to support the preparation of the Council's forthcoming new planning scheme being prepared under the Sustainable Planning Act 2009 (SPA).

As stated in the brief, the purpose of the study was to address the principles and requirements of the SEQ Regional Plan (2009-2031 ('SEQ Regional Plan')) and the associated SEQ Rural Futures Strategy, with particular regard to:

- clearly identifying the role and function of the region's rural areas, including the rural townships in those rural areas;
- expanding and apply the concept of place types contained in the NGP handbook to the rural areas of Moreton Bay Region;
- identifying and describing the current and anticipated residential and employment structure of the various place types within the study areas;
- identifying opportunities to future develop rural enterprises particularly where they add value to existing and future primary production;
- recognising the role of biodiversity values and the natural environment and identifying opportunities to protect and restore these values in the study areas;
- identifying any 'rural precincts' (as provided for in the SEQ Regional Plan); and
- providing recommended implementation strategies for future development which take into account strategic direction regarding the role and function of the rural study areas.

1.2 The Project Team

In October 2011, Council appointed a project team assembled and led by Buckley Vann Town Planning Consultants and comprising:

- **Buckley Vann Town Planning Consultants** – lead consultant, project management, place role and function review, housing needs assessment and policy development;
- **LRAM** – rural land capability and rural futures assessment;
- **CChange Sustainable Solutions** – economic futures and identification of the role and function of centres, support for housing needs assessment;
- **Yurrah** – assessment of environmental and ecological values; and
- **Bligh Tanner** and **BMT WBM** - strategic infrastructure assessment, catchment and water cycle implications.

1.3 Approach, Methodology and Process

Appendix A provides as summary of the methodology undertaken to support the study.

The project was intended to provide high-level policy responses for rural areas, generally in accordance with the project brief, to support in particular the drafting and finalisation of the Strategic Framework within the draft planning scheme. It was not intended to provide detailed scheme criteria.

However, the project team was encouraged to make recommendations based on the findings of the study, at whatever level was considered necessary. These could include recommendations for the scheme, for other non-scheme measures, and for further work if this was considered necessary.

The process included three team workshops, (2 November, 21 December 2011, and 6 March 2012), also attended by Council's project managers, to ensure integration of approach and recognition of emerging issues across workstreams. A tour of the region was undertaken by several members of the project team with Council officers, on 30 November 2011.

On 14 December 2011, meetings were also held with Councillors who wished to contribute directly to the assessment process. This is discussed in more detail in section 2.3.

1.4 The Study Area

The Moreton Bay local government area comprises the three former local government areas of Redcliffe, Pine Rivers and Caboolture. The three currently applicable planning schemes are based on the previous local government boundaries, and contain a range of zone names and scheme criteria.

In addition, the regional land use categories (Urban Footprint (UF), Rural Living (RL), and Regional Landscape and Rural Production (RLRP) from the SEQ Regional Plan apply to land in the Moreton Bay area.

Following a preliminary assessment of the policy context, the study area was defined to include:

- all areas zoned rural or rural residential (or similar) within existing planning schemes (either RLRPA or RL in the SEQ Regional Plan); and
- land in the UF and RL designations in and around Samford, Dayboro, and Woodford.

Apart from land in townships, land in the urban footprint within the main urban areas was not included in the study.

1.5 This Report

This report is the main output of the study. It reflects and collates:

- a review of all relevant information inputs, as undertaken by the various workstreams;
- the outcomes of the assessments undertaken by the various workstreams working both individually and as a team; and
- a synthesis of the issues emerging from those assessments.

As the main product of the study, the report includes a Rural Areas Strategy which provides a framework for the drafting of the new planning scheme, based on the concept of place types. Finally, it also includes a range of recommendations for the scheme generally, and for other non-scheme measures for Council's consideration.

The report also includes mapping and other information, to support the conclusions presented.

2.0 POLICY AND PLANNING CONTEXT

2.1 Overview

This section provides a brief overview of the legislative and policy context for the project, particularly in terms of land use policy.

It includes a brief summary of key Council policies and draft planning scheme criteria which are not yet available for public consideration.

2.2 Key Legislative and Policy Settings

2.2.1 Sustainable Planning Act 2009 and QPP

The Sustainable Planning Act 2009 (SPA) provides the framework for Queensland's planning and development assessment system. The SPA seeks to achieve sustainable development and in doing so seeks to balance community well-being, economic development and protection of the natural environment.

In achieving this purpose, the SPA establishes 'valuable features' as a core matter to be addressed in the preparation of planning schemes. The consideration of conservation values and subsequent incorporation of provisions for these values in the new planning scheme will need to have regard to this legislation.

The Queensland Planning Provisions (QPP) is a state planning instrument under SPA and mandates a consistent form of planning schemes across Queensland through a standard structure, format, suite of definitions, zones, overlays and the like. The QPP advances the SPA's intent to achieve sustainable development through prescribing natural environment, resources and landscape elements within the strategic framework, overlays and specific development codes. Although QPP mandates a standard format for schemes, it also allows for area specific information to be incorporated.

The first planning scheme for the combined Moreton Bay area is currently being drafted by Council in-house. The scheme will rely on the outcomes of this study to inform strategic planning for rural areas and towns and villages in the life of the planning scheme.

Beyond these high level intentions of the Act, the key State level policy directions relevant to this study are contained within the state planning policies and other guidelines discussed below. In addition, other legislation and policies may affect how Council responds to non urban issues and are briefly outlined.

2.2.2 State Planning Policies

The most current state planning policies that are potentially applicable to this rural land study are listed below:

- SPP 1/12 – Strategic Cropping Land;
- SPP 3/11 – Coastal Protection;
- SPP2/10 – South East Queensland Koala Conservation;

- SPP4/10 – Healthy Waters;
- SPP1/92 – Development and the conservation of agricultural land;
- SPP2/02 – Planning and managing development involving acid sulphate soils;
- SPP1/03 – Mitigating the adverse impacts of flood bushfire and landslide;
- Temporary SPP2/11 – Planning for Stronger, More Resilient Flood Plains;
- SPP2/07 – Protection of Extractive Resources;
- SPP1/07 – Housing and Residential Development.

The State Government also recently developed state planning policies for two particularly significant environmental concerns; strategic cropping.

2.2.2.1 SPP 2/10 South East Queensland Koala Conservation

This is addressed in more detail in Section 3.5.

2.2.2.2 SPP 1/12 Strategic Cropping Land

On 23 August 2010, in response to the rapid expansion of the mining industry in parts of Queensland, and seeking to strike a balance between competing cropping and mining interests, the Queensland government released 'Protecting Queensland's strategic cropping land: A policy framework (*SCL framework*)', outlining the government's approach to protecting the state's best cropping land resources, defined as strategic cropping land, as the basis for developing and implementing legislative and planning tools. Consultation was invited on the proposed framework.

On 30 January 2012, the *Strategic Cropping Land Act 2011*, Strategic Cropping Land Regulation 2011 and a new State Planning Policy (SPP 1/12 – Protection of Queensland's strategic cropping land) commenced. The SCL SPP operates in tandem with SPP 1/92 – Development and the Conservation of Agricultural Land, which applies to a broader range of agricultural lands. The SCL SPP overrides the GQAL SPP to the extent of any inconsistency.

The Moreton Bay region is included in the Coastal Queensland zone on the associated trigger map (refer **Figure 1** below). The trigger map identifies potential SCL, which is land where SCL map exist.

A list of exclusions applies, including development proposed in an urban area or existing or future rural residential area under a planning scheme (defined under a SPA regulation), within the urban footprint (designated under a statutory regional plan), and key resource areas.

In other locations, development applications on SCL may require referral to DERM (as a concurrence agency) where:

- a Material Change of Use on a lot 5ha or greater and the development footprint is greater than 750m²;
- a Reconfiguration of a Lot if any lot is less than 15ha.

Additional referrals can be triggered for development applications within a Protection Area, however, this does not apply in the MBRC area.

The following extract from the trigger mapping suggests distribution of SCL within Moreton Bay is limited. However, a closer examination of potential impact on the new planning scheme is warranted, particularly where new growth areas overlap with land designated as potential SCL.



Figure 1: Extract of SCL Trigger Map

The implications of the SCL SPP for the Moreton Bay planning scheme is that the policy has to be reflected through the allocation of land uses, buffering of SCL from urban development, adoption of appropriate lot sizes and policies to reduce pressure for urban expansion.

These policies need to be reflected in zoning maps, level of assessment tables, the ROL code and rural use code. There is no requirement to include the SCL trigger mapping into the planning scheme, nor is there are need to include a specific SCL overlay code.

The assessment of the impact of this SPP on the scheme is a relatively complex, one beyond the scope of this study. Again, further investigation of the extent of SCL in Moreton Bay rural areas is warranted.

2.2.2.3 Queensland Coastal Plan and SPP 3/11

The Queensland Coastal Plan was released in January 2012, replacing the '*State Coastal Management Plan – Queensland's Coastal Policy*', which was in operation from February 2002 to October 2011. Regional coastal management plans approved for individual regions within Queensland have been repealed and their locality specific policies largely incorporated into the Queensland Coastal Plan. This includes those plans for the Wet Tropical Coast, Cardwell-Hinchinbrook, Curtis Coast and South East Queensland.

The Queensland Coastal Plan has two distinct components; the State Policy for Coastal Management and SPP 3/11 State Planning Policy - Coastal Protection (which took effect on 3 February 2012). The management policy relates primarily to development that is not assessable under the planning scheme and serves the purpose of protecting valuable coastal land and resources within Queensland during statutory decision making stages by relevant authorities. It achieves this by stating specific policy outcomes that must be addressed and delivered by any proposed activities or future actions in the coastal zone. In comparison, the SPP determines criteria for assessing development, land use planning and coastal activities within the coastal zone, so as to better manage development in valuable coastal areas.

The Queensland Coastal Plan is of significant importance to the Coastal Areas and Surrounds community of interest identified in this report. The rural land strategy must consider the principles of the Plan in any proposed land use changes, future growth areas and recommendations for the Coastal Areas and Surrounds and the Moreton Bay region in its entirety.

2.2.3 Regional Context

2.2.3.1 South East Queensland Regional Plan 2009-2031

The South East Queensland Regional Plan 2009-2031 ('the regional plan') was developed by the Queensland Government, in consultation with local governments, as a response to managing population growth in the region and the resultant need to protect environmental assets, lifestyles and rural localities during this period of rapid change. The strategic directions of the regional plan highlight the importance of protecting rural areas from the encroachment of urban development and further fragmentation by rural residential subdivisions. Supporting rural production to generate a diversification of rural industries will also enable the preservation of key inter-urban breaks between residential growth areas. It is the aspiration of the regional plan for growth to be consolidated within and immediately adjacent to rural townships.

The majority of the study area is included within the Regional Landscape and Rural Production Area (RLRP) of the regional plan. This designation aims to protect certain areas from inappropriate development, including urban and rural residential development.

Parts of the southern portion of the Moreton Bay area are also included within the Rural Living Area (RL), as designated by the regional plan. These are areas that have been identified as being suitable for further rural residential development, primarily through infill and consolidation measures.

Through the regional policies of the regional plan, several key issues have been identified for the protection and preservation of rural areas. Despite being designated as areas with significant rural values and regional production potential, inconsistencies between regional planning measures and local planning scheme zoning intents and pressures from market demand can result in inappropriate developments in unsuitable areas. Balancing regional growth and land use change with increased rural production and the protection of regional landscape values is one such issue. Issues on the urban fringe include conflict between rural activities and urban uses and the encroachment of housing into agricultural areas.

2.2.3.2 SEQ State Planning Regulatory Provisions

Part F of the regional plan comprises the State Planning Regulatory Provisions ('SPRP') for the entire region. They support the objectives of the regional plan by prescribing referrals to State agencies in relation to assessment of development applications above listed thresholds in the RLRP and RL areas.

Of particular relevance to this study is Division 3 of Part F, which establishes a minimum subdivision size of 100 hectares in the RLRP, except in very specific circumstances.

The SPRP provisions override subdivision provisions in local scheme provisions.

2.2.3.3 South East Queensland Rural Futures Strategy 2009

The South East Queensland (SEQ) Rural Futures Strategy 2009 – subtitled '*Actions to improve the economic prosperity, environmental wellbeing and quality of life of rural South East Queensland*' - forms part of the regional plan. It includes an action plan building on existing programs, and aims '*... to support the sustainable economic and social development of SEQ's rural areas*'.

The strategy indicates that healthy and productive rural landscapes are those that support profitable and sustainable rural industries and communities, whilst protecting environmental values. It specifies targets for various aspects of rural futures (rural planning, healthy waterways, environmental stewardship and ecosystem services, water resources, water management, skilled labour force, social infrastructure, and so on) over a range of timeframes.

The implementation of the strategy is based on a 'Rural Futures action plan', which supports the strategy's strategic action 15 as follows:

'Ensure implementation of the Rural Futures Strategy through effective mechanisms for inter-agency co-operation, monitoring and reporting.'

The strategy is general in nature and does not have specific implications for the rural areas strategy.

2.2.3.4 Implementation Guideline No. 6 – Rural Precinct Guidelines – August 2007

The introduction to the guideline indicates:

'Rural precincts will enable local governments to modify the effects of the SEQ Regional Plan's Regulatory Provisions to protect and promote profitable and sustainable land uses and regional landscape values. Rural precincts are areas within the Regional Landscape and Rural Production Area or Investigation Area that are created—subject to particular administrative arrangements—to improve the implementation of a range of regional policies under the SEQ Regional Plan; and to develop innovative planning approaches that assist in managing regional landscape values at a local level.'

A Rural Precinct Plan is a document prepared by local governments detailing the planning intent for a rural precinct(s) and proposed planning scheme amendments to establish and manage the rural precinct(s). A Rural Precinct Plan should demonstrate the relationship between the rural precinct planning intent and other planning initiatives such as economic development strategies, infrastructure planning, natural resource management plans and environmental management strategies. (p1)

The Guideline provides direction for State and local governments and the community to collaboratively plan and develop rural precincts by building upon a number of principles of the 'Rural futures' component of the SEQ Regional Plan, including:

- *identifying key areas where rural precincts can sustain rural industry*
- *preventing inappropriate fragmentation of land*
- *enhancing infrastructure and investment opportunities in rural precincts*
- *managing land use conflicts*
- *enabling rural industries to diversify, adjust, innovate and value-add*
- *identifying alternative economic uses of rural land*
- *protecting and promoting productive activities within a rural precinct*
- *protecting and promoting regional landscape values*
- *sustaining benefits to the community derived from the natural environment.'* (p3)

Woodfordia, based on the site of the Woodford Folk Festival north-west of Woodford in the study area, is the only proposed rural precinct planning instrument². Woodfordia is described in more detail in Section 2.4.

2.2.4 Local Context

2.2.4.1 Moreton Bay Regional Council Corporate Plan 2009-2014

The Moreton Bay Regional Council Corporate Plan is an overarching document that explores the key actions and initiatives of the Council, in relation to particular challenges or desired outcomes for the region.

The vision for the Council, as determined by the Corporate Plan, is to create a region of opportunity where sustainable communities enjoy work, recreation and lifestyle. There are four main objectives and strategic directions for the region, including enabling a community that takes pride in the region, serving the community with integrity, pride and accountability, establishing a sustainable environment for all and providing a region of opportunity.

The plan includes no direct mention of the aspirations for or desired development in rural areas.

2.2.4.2 Moreton Bay Regional Council Community Plan 2011-2021

The Moreton Bay Regional Council Community Plan 2011-2021 is Council's response to the requirement in section 104 of the Local Government Act 2009 to prepare a community plan.

² At the time of writing, Woodfordia was still in the first State interest review phase.

The community plan has a supportive relationship with the planning scheme of a local government area, serving to outline the goals, strategies and policies for implementing the vision of the local government for the future of the local government area during the period covered by the planning scheme.

Developed in partnership with the community through extensive consultation, the community plan will guide Council's actions for the next 10 years with regards to community development and support. The plan identifies key themes, outcomes and targets to ensure that outcomes are measurable and achievable.

Within the community plan, the future of rural areas is not expressed as a significant priority. It features as a secondary concern or supporting factor for other growth areas; specifically, local jobs for residents and well-planned growth.

2.2.4.3 Existing Planning Schemes

Pine Rivers Plan

The Pine Rivers Plan was adopted by the former Pine Rivers Shire Council in 2006 and remains the applicable planning scheme for the former Council area. The future of rural areas is a key focus of the plan. Desired environmental outcomes (DEOs) administered by the plan determine that development and land use must satisfy the rural and semi-rural lifestyle aspirations of the community, whilst maintaining existing ecological processes and natural systems.

A mix of traditional and new agricultural activities is also encouraged within rural areas, as are tourism and recreational activities that do not adversely impact on the amenity of neighbourhoods. Within the context of the planning scheme, the Pine Rivers area is divided into several localities, within which zoning provisions are determined. Intents for local centres are also identified within the plan, in addition to those posed by locality designations.

Localities

With regards to local centres with a particularly rural focus, there are five key localities; catchment locality, village locality, mountain summit and forests locality, semi-urban locality and rural living locality.

Catchment Locality

Land uses within the catchment locality are intended to be predominantly rural in nature and inclusive of agricultural and horticultural activities, small scale sustainable tourism and recreational uses and where appropriate, semi-rural residential development. Urban and semi-urban residential development is not to occur in this locality.

Village Locality

The village locality is primarily inclusive of the Samford and Dayboro Village areas. Development in these locations is predominantly urban, including urban residential development, semi-urban residential development, local shopping, commercial, industrial and community facilities. Rural land uses are not identified as desirable within this locality.

Mountain Summit and Forests Locality

Significant visual qualities and scenic amenity are the dominant features of the mountain summit and forests locality, comprised primarily of the Mt Nebo and Mt Glorious areas. These are provided by the extensive range of ecologically significant and sensitive areas and steep slopes within the locality.

The area is also located at the headwaters of many water bodies and is in close proximity to protected areas. Residential development within this locality is of a low intensive built and mountain character, so as to maintain a high standard of amenity for residents. Passive recreational opportunities are also a key component of this specific area.

Semi-Urban Locality

Located in the region between Samford Village and Mt Nebo (and within the Urban Footprint area), the semi-urban locality is predominantly comprised of low density park residential development. Consisting primarily of larger residential lots serviced by semi-urban infrastructure, the role of this locality is to act as an identifiable interface and transition zone between the urban and rural living localities.

Rural Living Locality

The rural living locality is the predominant land use designation surrounding Samford Village. Land uses within the rural living locality are predominantly rural in nature and include agricultural and horticultural activities and both rural and semi-rural residential development. Sustainable recreation and tourism uses are apparent and mixed with more traditional rural living land uses. Urban and semi-urban residential development is considered to be inconsistent with the desired outcomes for this locality.

Local Centres and Zoning Provisions

With regards to residential development in rural areas, five key local centres have been identified within the bounds of the former Pine Rivers Shire Council local government area. These are Dayboro, Samford Village, Mt Glorious, Mt Nebo and Mt Samson. These local centres are located within specific localities and are also subject to various zoning provisions. This includes minimum lot sizes and restrictions on land uses.

Dayboro

The Dayboro area is located primarily within the village locality and also includes areas within the catchment locality. Local level shopping, commercial, industrial and community facilities only are to be located in Dayboro, with higher order industrial and commercial facilities and services considered to be inappropriate for the centre. Urban residential development is permissible in Dayboro, however only where an acceptable level of appropriate infrastructure to support such development is provided.

Samford Village

The centre of Samford Village is identified as a village locality. The surrounding areas are included within both the semi-urban and rural living localities. Not unlike Dayboro, local level shopping, commercial, industrial and community facilities only are to be located in the village, with higher order industrial and commercial facilities and services considered to be inappropriate for the centre. Urban residential development is permissible in Samford Village, however only where an acceptable level of appropriate infrastructure to support such development is provided.

Mt Glorious

The majority of the Mt Glorious area is included within the mountain summit and forests locality, with a small portion located in the rural living locality. The planning scheme notes that the Mt Glorious area is to provide for a forest lifestyle, with low key tourist accommodation, conservation areas and low intensity agricultural land uses.

Mt Nebo

The Mt Nebo area provides for a rural forest lifestyle, not unlike that of the Mt Glorious area. Low key tourist accommodation, conservation areas and low intensity agricultural land uses are also featured within the area. The majority of Mt Nebo is considered to be included within the Mountain Summit and Forests Locality, with a small portion (primarily the Highvale area) designated within the Rural Living locality.

Mt Samson

The entire Mt Samson area is located within the catchment locality. No urban or semi-urban residential development is to occur in this area, with rural residential development considered to be appropriate only in Rural Residential zoned areas. Planning provisions for the Mt Samson area have been developed to ensure that the ability of rural land to accommodate rural activities is not compromised by surrounding land uses.

Caboolture Shire Plan

The Caboolture Shire Plan commenced in 2005 and is the applicable planning scheme for land in the former Caboolture Shire Council area. It addresses the future of rural areas within both its strategic framework and DEOs, having a primary focus on nature resource protection and preventing encroachment of residential development onto valuable rural and agricultural land.

The strategic framework in particular details that natural economic resources (including good quality agricultural land) are to be protected from development and land uses that have the potential to reduce their productive capacities. Furthermore, the existing rural production area and open space network to the north of Caboolture is to be retained as an inter-urban break between the Sunshine Coast and Brisbane metropolitan urban areas.

The strategic framework also determines that new rural residential development is to be primarily comprised of the redevelopment of existing areas and infill development within existing urban boundaries. In addition, rural residential housing should be located within the periphery of the urban area, without extending beyond the existing zone boundaries.

DEOs for the shire highlight the importance of rural lands as a valuable element of the region's character and claim they should be protected from incompatible land uses. The DEOs also reinforce that the rural residential area located to the north of Caboolture should remain as a major urban break zone between Brisbane and the Sunshine Coast.

Unlike the Pine Rivers Plan, the Caboolture planning scheme does not divide the entire local government area into localities or districts. Instead, the region is divided into three planning areas; Central, Eastern and Western. These boundaries have no impact on the planning restrictions for each area - they are simply a delineation tool.

Instead, zoning provisions are the primary regulatory tool. There are ten key zones administered by the Caboolture planning scheme, five of which have particular relevance to the local centres and rural areas included within the study area. These are the:

- Residential A zone;
- Residential B zone;
- Rural zone;
- Local Centre zone; and
- Rural Residential zone.

A short summary of each of these zones is detailed below.

Residential A Zone

The primary built form within this zone is the detached residential dwelling, located on a variety of lot sizes. A variety of dwelling options caters for the needs of a diverse community.

Residential B Zone

Within the Residential B Zone, a diverse range of medium to high densities and residential types are provided. Although higher densities are permitted, these must be of a suitable scale and built form to maintain the preferred amenity and character of the locality.

Rural Zone

The Rural zone provides for a wide range of agricultural, animal husbandry and rural support activities. Residential land uses are not encouraged, aside from accommodation buildings that cater for short term tourist stays in association with or in proximity to tourist attractions and rural based activities.

Provisions for the Rural zone protect agricultural land and rural industries from the intrusion of incompatible development. Any land uses that may result in the fragmentation of land, compromising the viability and integrity of current and future rural based activities are avoided, using separation distance and buffer areas between these localities where appropriate.

Local Centre Zone

A mix of land uses is encouraged within the Local Centre zone. All development must be of a small scale and compatible with the function of a local centre in respect to the centre hierarchy.

The table below details the minimum lot sizes for these zones, as specified in Table 7.21 of the Reconfiguration of a Lot Code (Division 16).

Zone	Minimum Lot Size
Residential A	600m ² (sewered area) 3,000m ² (unsewered area) 400m ² (emerging area)
Residential B	1,200m ²
Rural	100 hectares (where outside the Urban Footprint)
Local Centre	600m ²
District Centre	600m ²

Rural Residential Zone

The Rural Residential zone includes a range of areas with differing characteristics in terms of access to services and infrastructure and so on. While a consistent set of underlying criteria apply to all lots, including that development is consistent with single detached dwellings on large lots, with restricted agriculture and non-intensive animal husbandry activities permissible, additional policy tools are added to prescribe more detailed policy.

Rural Residential Areas

In addition to the zone, Schedule 6, operating in effect as an overlay, identifies eight rural residential areas, comprising a mix of zonings. Three of these are situated within the study area:

- Woodford/D'Aguilar (Area 1);
- Wamuran (Area 2); and
- Ningi (Area 5).

(The other rural residential areas located outside the study area include Caboolture/Elimbah (Area 3), Caboolture East (Area 4), Morayfield (Area 6), Burpengary (Area 7) and Narangba/Deception Bay (Area 8).

The rural residential areas are mapped separately in Schedule 6 and divided into the following sub-areas, which related to Table 7.21 in the Reconfiguration of a Lot Code, prescribing minimum lot sizes. These are:

- Buffer Area;
- Park Residential Area;
- Restricted Area; and
- Transition Area.

The minimum lot sizes for each area are listed below.

Zone	Minimum Lot Size
Rural Residential	
Buffer Area	8,000m ²
Park Residential Area	3,000m ²
Restricted Area	No further subdivision
Transition Area	2 hectares

Rural Residential Areas

The three rural residential areas located within the study area are inclusive of a mix of zonings and subdivision restrictions. These are detailed in the following section.

Woodford/D'Aguilar

The Woodford / D'Aguilar area is comprised primarily of Rural zoned areas, approximately 50% of the entire area. Another 30% of the area is identified as Rural Residential zoning. Within this area, 60% is included within the buffer area, 25% is restricted and another 15% is park residential area. A small transition area is also included to the north of the centre. The remaining areas of the precinct are included within the Open Space zone (15%) Residential A Zone (5%), Local Centre Zone (approximately 20 lots) and the Residential B Zone (approximately 9 lots).

Wamuran

The Wamuran area is surrounded primarily by Rural zoned land, comprising 65% of the entire area. Another 25% of the land is identified as Rural Residential. Within this zoning classification, 60% is included within the Buffer Area, with approximately 20% of land uses restricted to Park Residential Areas and 20% within Restricted Areas. Of the remaining land in the precinct, approximately 7% is identified as Open Space and another 3% is located within the Residential A zone.

Ningi

Not unlike the majority of other rural residential areas, the Ningi area is comprised of 50% Rural zoned land. The remaining land is included within the Rural Residential zone (25%), Residential A zone (15%) and Special Use zone (10%). Within the Rural Residential zone, approximately half of the land is included within the Restricted Area, with the remaining land located within the Buffer Area and Park Residential Area equally.

Redcliffe City Planning Scheme 2005

The Redcliffe City Planning Scheme commenced in 2005 and is the applicable planning scheme for land located in the former Redcliffe City Council Local Government Area. The majority of this area is located within the Urban Footprint, as designated by the South East Queensland Regional Plan 2009-2031.

As such, the strategic framework put forward by the Redcliffe City Planning Scheme focuses primarily on city image, managing population growth and change, economic development, industry, transport and natural features or resources. Due to the lack of rural production and rural living areas included within the bounds of the Redcliffe area, the planning scheme for the former Redcliffe City Council area includes limited provisions relating to rural areas and resource protection.

As a result of the strategic location and lack of rural areas located within the Redcliffe area, the Redcliffe City Planning Scheme is not relevant to the study area and a thorough analysis of its policies and provisions has not been included in this report.

Total Water Cycle Management Strategy for Moreton Bay Regional Council – December 2010

The Total Water Cycle Management Strategy, prepared for Council by BMT-WBM, identifies key issues for the region with regards to integrated water cycle management as the first response to preparation of a detailed Total Water Cycle Management Plan as required for local governments in SEQ by the Environmental Protection (Water) Policy 2009.

These include assessment of the impacts of stormwater, runoff and sewage effluent on waterway health, and how best to manage water supplies and alternative water sources. The strategy divides the Moreton Bay Region into various catchment areas, identifying water 'accounts' for each catchment area.

The strategy also identifies key management actions to address water cycle management issues on a catchment by catchment basis which are to be further detailed in the Total Water Cycle Management Plan (final draft submitted to Council). These actions need to be considered in future land use planning in the region where integrated water cycle management may be required or impacted upon.

2.3 Councillor Consultation

On 14 December 2011, members of the project team met in Caboolture with Cr Adrian Raedel, Councillor for Division 12, and Cr Bill Millar, Councillor for Division 11.

The views of the Councillors have been taken into account in the assessment process.

2.4 Future Directions

2.4.1 Draft Woodfordia Rural Precinct Plan

As previously discussed, the draft Woodfordia Rural Precinct Plan, based on the Woodford Folk festival site north-west of the town of Woodford, currently the only rural precinct planned in Queensland, is currently subject to first State interest review and is expected to be available for public notification by approximately mid-2012.

The plan for the precinct focuses primarily on facilitating events and short term accommodation to support the use of the site for a range of festival activities. The amenity of surrounding rural uses is an important focus of the plan and no long term accommodation is permissible within the precinct.

Through a focus on event management, overall outcomes for the rural precinct detail the protection of surrounding sensitive uses and rural activities from the proposed activities within the precinct. Buffer areas are to be used to minimise the impact on the character and amenity of the rural surrounds.

2.4.2 Draft Moreton Bay Planning Scheme – Draft Strategic Framework (Confidential)

Council is currently preparing its new planning scheme in accordance with the requirements of SPA and QPP. The draft scheme has not yet been submitted to the Minister for Local Government and Planning for first State interest review and the detail therefore remains confidential. Nevertheless, to support the study, Council has provided the draft strategic framework for consideration by the project team, on a confidential basis.

The draft strategic framework combines ‘...a consideration of the broad place types...; an assessment of the regional character areas...; the opportunities and constraints to development; and the availability of existing and planned infrastructure to develop a draft strategy for the region’.

The draft strategic framework divides the region into five planning areas:

- Caboolture-Morayfield;
- North Lakes-Redcliffe-Moreton Bay Rail Link;
- Strathpine;
- the Coastal Villages and Bribie island; and
- the rural areas.

‘Each of the planning areas is intended to serve two main purposes:

- (1) to provide a reference plan for the ultimate general form and nature of development of the each district through the allocation of relevant place types; and*
- (2) to provide the broad conceptual basis and specific outcomes for assessing the suitability of development proposals in a continuing process.’ (Section 3.13, p54)*

‘The Rural planning areas provides for a community of 45,000 people and 7,500 jobs together with a wide range of facilities and services required for a rural area of this scale.

The district will include:

- (1) The rural townships at Samford, Dayboro, Woodford-D’Aguilar and Wamuran;*
- (2) Dispersed housing and rural residential areas;*
- (3) Extensive cropping and forestry activities;*
- (4) Other agricultural activities;*
- (5) Extractive industries;*
- (6) Extensive native forests and natural areas including waterways and water supplies; and*
- (7) An integrated transport network that supports movement of goods and people within and through the district ‘ (p74)*

The draft strategic framework includes an ‘MBRC Place Model’ which ‘...will be used to guide the planning and development of the diversity of places across the region’.

The brief for this study indicates that the study outcomes will assist in (among other things):

- identifying the role and function of the region's rural areas, including the rural townships in those rural areas; and
- expanding and apply the concept of place types contained in the NGP handbook to the rural areas of Moreton Bay Region.

2.4.3 Review of Rural Residential Areas

During 2011 and 2012, as part of the work program underpinning the preparation of the new Moreton Bay planning scheme, Council has been reviewing the planning and land use context of rural residential zoned areas, on a lot by lot basis for individual areas, to support zoning decisions and the drafting of planning and subdivision criteria for the new planning scheme.

The review will assist in providing a consistent approach to managing existing rural residential zoned areas in the new scheme, at a more detailed level than is possible in this study, but has not been directly relevant to the study given that it is being undertaken at a more detailed level.

2.5 Key Findings of Policy and Planning Context Review

2.5.1 Implications of the State and Regional Context

The SEQ Regional Plan continues to set the highest level policy for the future planning of rural areas in Moreton Bay, including rural land, rural residential, and towns and villages. The regional land use pattern prescribes a number of key policies influencing the study, notably:

- no further rural residential development outside of defined Rural Living areas;
- no further subdivision of rural zoned land less than 100ha;
- a prescribed urban footprint which effectively defines areas for future development within key towns and villages; and
- the opportunity to establish rural precinct planning provisions, and in the case of Moreton Bay, potentially providing for a range of specific uses at Woodfordia, centred on the folk festival site, as a contributor to economic development in the wider region (subject to approval of the proposed rural precinct by the State government).

Finally, while the QPP provides for a range of residential zones to reflect a range of circumstances, it provides for only one rural zone and one rural residential zone. While there is scope for use of precincts to identify local area characteristics and provisions within these zones, it does limit options for addressing diversity within them across the study area.

2.5.2 State Planning Policies

State Planning Policies (SPPs) are planning instruments that are developed and implemented to protect areas or assets that are of particular interest or benefit to Queensland. The average period for an SPP is ten years, during which time they can play a significant role in the growth of the state. Those most relevant to this rural land strategy include:

- SPP 3/11 Coastal Protection (see Section 2.2.2.2 Coastal Management Plans);
- SPP 1/12 Protection of Queensland's Strategic Cropping Land;

- SPP 2/10 South East Queensland Koala Conservation;
- SPP 1/03 Mitigating the Adverse Impacts of Flood, Bushfire and Landslide;
- SPP 4/10 Healthy Waterways; and
- SPP 1/92 Development and the Conservation of Agricultural Land.

The SPPs detailed above will have significant impacts and implications for the rural land strategy proposed for the Moreton Bay region. As a resource of both State and national importance, strategic cropping land, now protected by SPP 1/12 as of January 30, 2012, must be preserved and maintained to preserve its productive capacity. The rural land strategy must ensure that all strategic cropping land located within the region, as identified by the relevant SPP, is not impacted by proposed growth and development in both housing and industry. This also applies to good quality agricultural land. SPP 1/92 provides guidance to local governments on how this state asset can be conserved. Any rural strategy must consider the location of good quality agricultural land and recommend suitable development and growth patterns to protect them.

This is also true of koala habitats and identified conservation areas. SPP 2/10 South East Queensland Koala Conservation both directs and influences land use planning by identifying significant koala populations, potential habitats and conservation areas in South East Queensland, including the Moreton Bay region. The growth of Moreton Bay's rural areas must take into consideration these significant locations and limit impacts of growth and development on them.

Natural hazards are also an important consideration for any development or growth strategy. SPP 1/03 seeks to mitigate the negative impacts of natural hazards (particularly floods, bushfires and landslides), by requiring local government areas to identify natural hazard management areas and develop planning requirements specific to development in these areas. To protect future growth and development in Moreton Bay's rural areas, these natural hazard areas must be identified and appropriate mitigation measures proposed within the context of the region's rural strategy.

SPP 4/10 deals with the management of stormwater impacts resulting from urbanisation, so is relevant to this strategy in regard to residential development in the village areas as such development will be required to meet the objectives outlined in the SPP.

SPPs such as those discussed above also provide an opportunity to establish an identity for the Moreton Bay region and the townships it includes. Furthermore, by being aware of these state resources, not only can they be protected, but they can also be enhanced and where possible, used to stimulate economic growth and other benefits. For example, by being aware of strategic cropping land locations and available good quality agricultural land, investments can be made to encourage appropriate agricultural businesses in these areas. Additionally, significant koala populations may be used to promote the region and may even lead to eco-tourism facilities.

2.5.3 Implications of the Moreton Bay context

The current local planning schemes, based on the previous local government areas, combine to form an inconsistent planning framework for the study area.

While both the Pine Rivers and Caboolture schemes manage rural and rural residential land use issues, the Pine Rivers scheme provisions are based on an analysis of land characteristics to a greater extent than Caboolture. While the Pine Rivers approach provides a closer fit to the place types concept proposed in the draft Strategic Framework of the new planning scheme, its scope is limited to only about half of the study area.

Of significance is the lack of policy emphasis on rural and rural residential areas in current local planning and corporate documents. A fundamental requirement of the new planning scheme will be to ensure a consistent planning regime to address the underlying issues for rural areas, including rural residential development and rural land fragmentation.

In addition, the high level aspirations articulated through the corporate and community plans, while not specifically emphasising a vision for rural areas, imply a greater emphasis on sustainability as the basis for future plan-making.

2.6 Considerations for the New Planning Scheme

The implications of the regional plan and State interests, and of identified local issues and aspirations, point to support for the approach proposed by the draft Strategic Framework as reviewed by the study. A place-based approach is most likely to recognise the diversity of characteristics across the study area, as long as it is based on clear and reliable information about constraints and opportunities.

A number of high level constraints illustrated by the context review, particularly ecological constraints and limits on future subdivision outside the Urban Footprint, establish clear directions for the new planning scheme, and rural areas and townships within them.

3.0 DETAILED ASSESSMENTS

3.1 Introduction / Overview

The project team has implemented the project methodology by undertaking (i) reviews of relevant background material and (ii) detailed assessments of key characteristics and conditions within the study area to confirm constraints, opportunities, and potential roles and functions of rural areas, rural residential areas and townships, at a strategic level.

This process has included both individual work stream assessments, and integration of assessments where appropriate including:

- rural land activity and economic and employment factors;
- rural land activity and ecological factors; and
- economic and employment and residential and housing factors.

The following presents:

- the outcomes of individual and combined assessments;
- a summary of outcomes and emerging issues; and
- a final place typology based on the assessments.

This section is supported by a number of appendices.

3.2 Rural Land Assessment

3.2.1 Overview

One of the key difficulties with rural land use planning is that there is a wide range of influences on rural areas.

The original concept of a single Rural zone identifying those areas where rural pursuits at a commercial scale are the dominant land use, has proved largely ineffectual as the nature, scale and socio-economic reasons for people living in the rural areas has changed. The clear distinction between a 'rural use' and a 'non-rural use' within the Rural zoned has become blurred.

This is the case in most local government areas in South East Queensland, where land prices are no longer strongly linked to agricultural productivity and potential. This fact alone has led to some previously commercial-scale rural producers realising their capital gains from the region and investing elsewhere.³

The Moreton Bay rural zoned areas are particularly affected by this phenomenon. To further complicate this issue, existing planning schemes in the study area, particularly the current Pine Rivers and Caboolture planning schemes, have established an inconsistent approach to managing rural land in the study area.

³ For example, while Rural zones cover about 80% of the study area, within this, 20% is rural forestry, less than 10% is pineapple growing, and less than 20% is used for high value grazing.

The following is a summary of the findings of the rural land assessment undertaken for this study.

3.2.2 Information Reviewed

Information on rural land in South East Queensland, particularly in terms of mapping of land characteristics, is fairly limited.

The Stanley River Catchment area is covered primarily by Atlas of Australian soils mapping at scales of 1:1million and is of very limited use for Regional Planning. Smaller areas comprising less than 10% of catchment around Neurum and Woodford have been mapped at 1:50,000 and, whilst of more use for regional planning, the coverage is inadequate.

The areas east of Mt Pleasant and Narangba are covered by the horticulture land suitability mapping at a nominal scale of 1:50,000 but of a usable accuracy of 1:100,000. The land suitability schema applied in this 1987 work is dated and has not been updated to reflect changes in crops and crop management.

The coastal lands are covered by the acid sulphate soils mapping work – some of which uses the horticulture land suitability mapping boundaries and some of it based on more detailed actual soil survey.

The Pine River Catchment is covered by the Moreton Field Manual mapping, which itself is a compilation of separate surveys and usable at a scale of 1:250,000. There is no cohesive and transparent land resources data set on which a land suitability framework required to identify GQAL can be based at a whole of council level. Nor is there sufficient data to allow the identification of areas of actual SCL to be demarcated.

The above diverse data sets have, however, been collated by the Department of Transport and Main Roads as a common soils data set and used for their non GQAL and SCL purposes. This study used this data set to spatially indicate what areas are more likely to contain GQAL and this, combined with interpolation from the satellite imagery, was used to establish the general boundaries of the landscape precincts and groups.

3.2.3 Synopsis of Rural Industries in Moreton Bay

The following section provides a summary of the state of rural industries in the study area and some implications for the planning scheme.

Forestry

Originally forestry was based on hardwood forest logging, with value adding milling within local communities such as Samford and Mt Nebo. This once commercial industry has largely disappeared. Logged-over areas in the more accessible lands were converted to pastures and dairying and in more recent times the remaining resource has become more limited by regulation.

The forest resource is dominated by largely softwood plantations now largely exporting low value product out of the area for value adding elsewhere. Unless constrained by tenure and facilitated by taxation strategies, it is unlikely that expansion of forestry into the freehold lands will be significant – except in areas where there are no other alternative land use options. The carbon sequestration market is also unlikely to provide a boost to the industry in areas where land has comparative advantage for other uses. Apart from the capital losses associated with recent managed investment schemes for forestry, the medium term price direction of carbon is unclear with carbon trading internationally at approximately one fifth of the price currently mandated for Australia.

While it would be prudent to protect the areas currently used for plantation forestry, it would also be prudent to:

- identify sequestration forestry of exotics as an incompatible use for rural lands that are either GQAL or SCL;
- require all new forest plantation projects or sequestration projects to address fire, weed, landscape aesthetic issues – particularly where they are proposed in areas that also contain rural living or rural residential uses; and
- define the size of a planting above which it would be regarded as a plantation.

Dairying

Dairying was once the dominant high value agricultural use in the region, dominating the fertile uplands of the Samford area and almost all of the alluvia plains and inland valleys. Townships such as Woodford, and to a lesser extent Dayboro and Samford, were important service centres for this sector. The Woodford cattle, pig and calf sales are the last significant component of the old paradigm. Dairying remains a significant industry in the Upper Dayboro and in the Stanley River area, but it is now far less prevalent elsewhere.

In the study area, the restructuring of the dairy industry has followed a fairly straightforward pattern as follows.

- initially, the least profitable operations (the dryland dairies) failed and whilst some of the land was taken up by adjoining farmers, most of these farms were sold off block by blocks as many of these farms comprised more than one block. This was the start of new land settlement model which ultimately lead to the rural living uses of today;
- in the next phase, the remaining farms had to expand their herd sizes – milk production remained the same but the number of farms declined as more herds were increasingly supplementary fed. In the study area, the scope for this was limited. Some of the old grazed dairying areas produced fodder for the bigger farms and this still happens in parts of the Stanley River areas. There was and remains very limited scope for grain production – most grain has to be imported from outside of the region.

Today, the dairy industry remains significant as a relatively strong employer and high user of within district expertise. However, the region has lost its comparative advantage which was previously based on its more reliable rainfall and relative frost free improved pasture lands. The industry will continue to slowly contract. In the meantime, it is imperative that rural living style uses (let alone rural residential uses) not be co-located with the remaining dairy industry uses.

Beef Cattle

The beef cattle sector has a number of components. Commercial scale herds based on breeder herd as well as fattening herds have declined – primarily because the grazing sector needs relatively large herd sizes (300 to 500 breeders – 500+ fattening animals) to be viable as a stand alone commercial entity. In situations where such large herd sizes exist, the major external benefit is that large parts of the catchment are under single management.

As the number of larger enterprises has declined, they have been replaced by more, smaller herd sizes on smaller land holdings, as individual enterprises often comprising multiple lots have been sold off.

As a result, it is likely that actual herd numbers have increased, along with grazing pressure from an increasing number of new 'semi commercial graziers' who have invested heavily in some of the smaller properties, particularly on fencing yards tracks and fire breaks.

Despite the change of industry characteristics, the beef cattle sector will continue. Ultimately, it is the lowest cost form of land management – the alternatives of managing excess vegetation growth and weeds in the 47,000 ha of cleared land used for pasture are far more costly.

The challenge for the beef sector is to improve the skills and knowledge of the new part-time graziers so that land management outcomes over the third of the rural areas that are used for pastures are improved.

Equine Sector

The equine sector encompasses the working, pleasure, racing and performance horse sectors. The recent investment in an equestrian centre in Caboolture 'balances' the location of such facilities with facilities at Gatton and Warwick west of Brisbane and private facilities in the Scenic Rim.

It is, however, doubtful whether the equine sector will be able to compete with the Scenic Rim and Southern Darling Downs areas which have extensive and high end tertiary services sectors in place. The recreational part of the industry is likely to grow and it is particularly well integrated into the rural living land uses.

As in the beef sector, the land management skills of this sector need improving. It may also be worthwhile setting up guidelines for the location of stables, day yards etc as well as feed-out areas, so that sensitive waterways and other environmental assets are not threatened by equine related activities.

Intensive Livestock and Poultry

Both of these uses have a number of key strategic requirements:

- they must have high quality road and utility access for feedstuffs and produce; and
- they must be able to be located in areas where visual amenity is low and where land use conflicts can be minimized.

Apart from these requirements, the added issue of water quality management in the Pine and Stanley Catchments in particular is significant given the major water storages in these catchments. Within the Pumicestone catchment, the issues mainly focus on the impact on coastal and estuarine environmental water quality values. There are very few locations where landscape precincts will have the range of properties conducive to these outcomes for the following reasons:

- the large lots are all associated with non freehold tenures or lands currently used for forestry;
- with average lot sizes in the rural area precincts ranging from 15 to 30 ha, and with approximately one in two lots already built on, there will be very few locations where that could be suited to these industries;
- areas in the hills, uplands ranges all have terrain and microclimate condition which will increase development costs to manage odour, erosion and water quality problems; and
- the undulating plains, inland valleys and alluvial plains contain GQAL which will limit site selection.

Both industries also have relatively low commercial advantages in these areas. The egg component of these industries as well as cattle feedlots has shifted to the Darling Downs and South Burnett where climate and feedstock sources as well as terrain and access are more favourable. The chicken meat sector remains 'tethered' to SEQ by the location of the processing works. The length of the 'tether' from the processing works located south of the Brisbane River should also discourage further investment in the sector over time compared to areas west and south of Brisbane.

In short, the poultry industry in Moreton Bay will gradually die, either in this or the next planning horizon.

In the meantime, the new planning scheme needs to ensure that existing intensive livestock and poultry uses include buffers on their sites, rather than rely on separation including other properties. Encouragement to amalgamate parcels would assist.

Horticulture

Apart from dairying, horticulture and in particular pineapples has been a defining rural land use in the area. The Brisbane based cannery (now closed) provided a key comparative advantage for pineapples in the Wamuran area. The fact that pineapples still exist in the area now that the cannery has closed is evidence of the industries ability to adjust their farming system to produce product better adapted to the fresh fruit market. The key to the survival of the current industry is that the fresh fruit market has always existed. The cane industry on the other hand simply disappeared from the Maroochy cane lands as soon as the Nambour sugar mill closed – there being no other established market for cane that growers could commercially supply.

While pineapples have survived the closure of the cannery, in common with the cane industry, it is not conducive to diversification or scaling down to a semi commercial operation with many producers – in the way that beef has. Pineapple farming (like cane farming) is a highly specialized farming system, requiring specialized agronomy and machinery. Such skills and assets are not as easily applied to another crop if the industry goes into decline.

It is correct that farmers have left the industry. Leasing, renting and share farming by existing operators is increasingly common.

Today the pineapple industry is restricted to the Wamuran area and to the undulating plains precincts. There is no shortage of lands suited to pineapples either in this council area – or in areas along the coast line as far north as Yeppoon. Suitable lands are not limiting the industry – a lack of markets on which to base any expansion of the industry is the primary limitation.

Another issue for the decline of pineapple farming is its implications for disposal of waste water. The Total Water Cycle Management Plan (TWCMP) for MBRC identifies the pineapple farms as potential users for recycled water. Of particular benefit is that the level of treatment required for agricultural irrigation is anticipated as being less than that required for recycled water to be reticulated to residential benefits. A secondary benefit is that the nutrients contained in the recycled wastewater can assist in offsetting fertiliser application on-farm and returns nutrients back to where they were first applied. The TWCMP identifies the former Moodlu Ballast Quarry as having a water void suitable for storage of recycled water prior to distribution to the pineapple farms.

The challenges with the use of recycled water on these farms is that there hasn't been significant consultation with potential users to clarify the actual demand and quality of water required for irrigation. There is also the question of who pays for such a scheme, the farmers as they are being provided with a resource, or the residents whose wastewater is being reused and therefore not causing downstream environmental benefits. These issues have yet to be resolved and the viability of such a recycling scheme is therefore not assured

Other forms of horticulture also exist in the area. Strawberries are common, but again there is no shortage of land on which this crop can be grown, whilst tree based horticulture also exists – primarily on the better quality soils that are also used for pineapples.

Within the pineapple precinct the average lot size is 8 to 10 ha. A viable pineapple farms needs access to up to 100 ha of land after allowance is made for non crop area and the fact that crop areas require rotation over time. This data alone suggests that the main challenge facing the industry within the MBRC sphere of influence is to ensure that this fragmentation does not lead to unsustainable levels of land use conflict.

Summary of Industry Issues

Council will need to make a call about how / whether to include local provisions to protect remaining rural industries, or leave it to the State government. GQAL and SCL approaches are not likely to be sufficient grounds to resist subdivision pressures in the Moreton Bay context.

It is more likely that an approach based on identifying place types in which, within the next planning horizon, certain industries will maintain their economic and comparative advantages, could achieve the necessary outcomes. Priority areas are Wamuran and the inland valleys.

Rural Living

Whereas Rural Residential is a form of land use defined by subdivision and land use controls, 'rural living' is often used as a term for rural land uses that fill the void between rural residential and what is assumed to be commercial rural.

The reality, however, is that most rural enterprises based around grazing are likely to be reliant on other forms of income or production and in this sense the concept of rural families running profitable business using the land resources of the rural area is overly simplistic with the exceptions being the pineapple areas and the dairying sectors.

Setting aside the issue of what constitutes rural living, the following are the forms of land use that occupy the void between 'rural residential' and 'rural commercial' uses:

- *Residential Uses* – there are a significant number of lots zoned as rural that are less than 5 ha in size. Many of these are the product of previous family right subdivision whilst other are the result of multiple dwellings on rural land. As commercial rural activities have become less common, some of these dwelling become rental properties. In effect they can become low cost rental accommodation. The extent to which this occurs is not known.
- *Rural Lifestyle Uses* – These uses generally require a particular landscape aesthetic – whereas commercial agriculture focuses on resource productive qualities. The favoured locations for lifestyle uses are the foothills, hills and uplands, where lot sizes average up to 30 ha. It is unknown how many lots used for this purpose are occupied on a permanent basis.
- *Services Uses* – With increasing constraints on uses within the rural residential zone, home based businesses centred on trade and operator / contractor services as well as professional services have tended to focus on those parts of the Rural zone well serviced by infrastructure. While these uses contribute to local employment and an increased supply and use of local services, skills and investment, they also often have amenity impacts for neighbours.
- *Conservation uses* – These involve the management of freehold land for purely conservation outcomes. These are commonly areas with high biodiversity values or areas of particular water quality significance (eg. wetlands, flood plains, riparian corridors etc)
- *Grazing Uses - Equine and Beef* – This is the dominant form of land use within the rural living category, and is the only use suited to the greater majority of the rural areas. Within limits, it requires relatively minor capital investment and has relatively low operating costs. Currently, there are no significant controls on the land management outcomes from these uses. However, given the increasing intensity of these uses and their impacts on water supply catchments, consideration probably needs to be given to addressing land management and resource condition outcomes.

The strategic challenges that Council faces in codifying these various areas can be summarized as follows:

- Where should home business-type uses be encouraged or discouraged, and how can the inappropriate forms of use be regulated?
- Where should rural lifestyle uses be encouraged (if at all) and do areas best suited to these uses need improved protection from inappropriate uses?

Some observations of subdivision patterns in specific areas are as follows:

- only D'Aguilar/Woodford have any real scope for new greenfield rural residential development;
- Rocksberg/Ocean View is so constrained by biodiversity and terrain values that there is little potential for additional development there – it is not clear how many of the remaining vacant blocks can practically be developed;
- Samford has little potential for greenfield development especially when balanced with the need to rehabilitate conservation and other values. The southern part of the study area, Samford and Closeburn, is particularly heavily fragmented with high levels of dwellings. Most rural lots are well below viable farm size and/or similar to rural residential;
- population increase is inevitable around Wamuran and the north west of the study area. It will continue to have a large scale agricultural sector, and steps are needed to retain and not force current users out. Forestry uses will disappear in this area and conversion to other uses will occur, contributing to a higher demand for subdivision;
- Wamuran is included in the Caboolture West investigation area and therefore not considered in detail in this study. However, it provides an opportunity for seasonal worker accommodation, which is in very short supply in the Wamuran area. The regional plan prevents this type of use. It may be a more sustainable response as on-property accommodation rather than in rural or urban areas.

Lot Analysis

Appendix B – Rural Land Analysis – Lot analysis presents an analysis of all lots in rural and rural residential zones in the study area.

Overall, the study area is strongly fragmented. Across all areas, fragmentation has occurred to below minimum lot sizes for all reasonable / appropriate uses. This settlement pattern is the result of planning and subdivision policies going back up to a hundred years.

Nevertheless, as a result, there is no justification for further subdivision based on overriding community benefit.

The lot analysis indicates that around 70% of rural lots have dwellings on them, and there is still considerable potential for additional development on the remaining lots and on rural lots where traditional industries are declining, without any further subdivision.

For this reason, it must be said that the 'the horse has bolted' in terms of trying to contain isolated development. Even the environmental and conservation zones (with various names) have a significant number of dwellings already in existence. The decline in pineapple farming, particularly in the central area, will add to this problem, as many lots currently in rural use are in the size brackets suited for rural living and well below minimum farm sizes.

However, having said that, in some areas there may be some opportunity and justification to try to encourage amalgamation.

3.2.4 Key Emerging Rural Land Issues

The two main issues relating to rural land in the study area are:

- the decline in traditional primary industries and limited scope for new primary industries to replace them; and
- the increasing uptake of lifestyle living on existing fragmented rural lots, which can be expected to continue even without further subdivision.

Notwithstanding the extent of rural zoned land in the study area, traditional primary rural industries are, on the whole, declining. There is little scope for revitalisation of these industries, as most have lost their competitive advantage. (A further discussion of economic trends is provided in Section 3.7).

Remaining rural industries, including pineapples, will need to concentrate on value adding (eg. fresh food based products) in the short-medium term, but ultimately will need support to transition out of the study area in the next 10-15 years.

The key question for the future is how rural land can be maintained for its ecological and landscape values in this new era. In particular, how can pressure for the establishment of dwellings on existing isolated lots be managed, and how can landowners be encouraged to care for the land when it doesn't provide a living? There is not much to be achieved by Council setting up its own regulations or programs – generally, more is to be gained by working with regional planning frameworks.

Notwithstanding that, rural industries will continue to require support in the life of the new planning scheme. The main focus of support for the rural sector in the future should be the north-west part of the study area, centred on Woodford. The fragmentation of Dayboro and Samford means it is too late for these areas.

3.3 Residential and Housing Assessment

3.3.1 Objectives and Approach

3.3.1.1 Objectives

As part of the assessment process, the project brief called for a residential assessment of the rural areas, described in more detail in the following section. The particular objectives of the residential and housing assessment component of work were to:

- clearly identify the role and function of the region's rural areas, including the rural townships;
- identify and describe the current and anticipated residential structure of the various place types within the study area;
- expand and apply the place types concept to rural areas; and
- provide recommended implementation strategies for future development having regard to the role and function of rural areas, to inform the preparation of the new Moreton Bay Planning Scheme.

This section of the report primarily addresses the first two objectives listed above, while the last two objectives are discussed in Section 4.0.

The following section contains the bulk of the residential assessment scope of work (as per page 8 of the project brief), in particular:

- conduct a review of existing housing stock;
- undertake a local assessment of the projected nature of housing needs (diversity and affordability);
- identify how the needs of housing are to be addressed in the future – What type of housing will be needed? Type of housing suited to the demographic? Affordability with respect to servicing these areas with infrastructure?
- assess whether the current urban footprint area for the townships is adequate to accommodate future population and associated economic activity and services; and
- identify opportunities within the study area for infill residential development or redevelopment of older existing residential areas.

In addition, **Appendix C** contains additional material that relates specifically to the residential and housing assessment:

- Demographic and Housing Profile – Appendix C (a);
- Summary of Consultation Outcomes – Appendix C (b); and
- Methodology for Assessing Dwelling Demand – Appendix C (d).

3.3.1.2 Approach

The residential and housing assessment described in the following sections of this report are separated in the three sub-sections of work, which are:

- existing demographic and housing characteristics;
- estimate of dwelling demand; and
- estimate of residential land supply.

The general approach and methodology used to undertake each sub-section of work is described below.

Existing Demographic and Housing Characteristics

In order to understand the existing demographic and housing characteristics, a number of data sources were analysed including:

- demographic and housing data from ABS census (2006);
- buildings approvals data sourced from the Office of Economic and Statistical Research (OESR) (2006-2011);
- broadhectare data from OESR and provided by Moreton Bay Regional Council (2009);
- data on the number and type of recent development applications provided by MBRC (2003-2011);
- social housing data provided by the Department of Communities (2012);

- population projections for 2011-2031 by CCD (census collection district) commissioned and provided by MBRC (2010)⁴; and
- consultation outcomes from targeted consultation.

The findings of this analysis are summarised in Section 3.3.3 with further detail included in the Demographic and Housing Profile in **Appendix C (a)**.

The analysis focuses on the private housing market and aged care accommodation and less so on social housing, tourist accommodation and special needs housing (e.g. housing for people with disabilities, housing for young people etc).

Estimate of Dwelling Demand

The purpose of this component of work was to determine the total number of dwellings projected to be required to 2031, as well as the dwelling types likely to be required to match the needs of future households. To arrive at these projections, a series of calculations were undertaken which are described below and in further detail in Appendix C (d). The output is a 'target scenario', which provides an estimate of the total number of dwellings required by 2031 by dwelling type.

Projections of age groups, household type and dwelling demand at five year intervals (2011 to 2031) were calculated for this study and are provided in Section 3.3.4 of this report. The methodology is broken up into five steps, which involved:

1. Population projections by age group and gender, based on the proportional change for the same groupings in the MBRC area;
2. Projections of the number of persons by age group and household type based on proportions living in particular household types in 2006;
3. Number of households by household type based on the average household size for each household type in 2006;
4. Number of dwellings by dwelling type based on preferences of households to live in particular dwelling types in 2006;
5. Adjustments to projections of dwelling mix (i.e. types of dwellings) based on a hypothetical scenario trending away from a dominance of separate detached housing towards other housing forms.

Each step is discussed separately in **Appendix C (d)**. This process was followed for each community of interest (refer to Section 3.3.2.2 for a map of communities of interest used in this study).

Results of the dwelling demand analysis are provided in Section 3.3.4 below.

Estimate of Residential Land Supply

Estimates of residential land supply were determined using maps provided by MBRC showing:

⁴ As described in Appendix C (d), these projections were prepared by OESR for a commission by the MBRC and have been used as the base data for this various population and housing projections provided in this report.

- parcels of land registered as vacant under Council's rates database – this includes large land parcels and smaller infill land parcels; and
- parcels of land only containing an outbuilding (it is presumed that these lots could more readily be redeveloped compared with other forms of development).

This assessment was carried out for Urban Footprint and Rural Living Areas only within the study area as these designations support future residential or future rural residential development under the regional plan. Although it is acknowledged that additional housing may be constructed within the Regional Landscape and Rural Production Area, this is only likely to occur on existing vacant lots.

The outcome of this assessment is provided in Section 3.3.5.

3.3.2 Policy and Spatial Framework

3.3.2.1 South East Queensland Regional Plan

The *South East Queensland Regional Plan 2009-2031* (SEQ Regional Plan) and associated State Planning Regulatory Provisions (SPRP) provides the regulatory framework for future residential development within the study area. The land use designations that apply under the SEQ Regional Plan are the Regional Landscape and Rural Production Area (RLRPA), Rural Living Area (RLA) and the Urban Footprint (UF) (the latter applies within a limited number of rural townships within the rural study area). The key policy intent for each land use designation, and the locations within the rural study area that are designated within each, are summarised in table below.

SEQ Regional Plan Land Use Designations

Land Use Designation	Key Policy Intent	Locations within Rural Study Area
<i>Regional Landscape and Rural Production Area (RLRPA)</i>	▪ <i>residential and rural residential development (other than a private residence on an existing lot) only permitted where:</i> – <i>locational requirements or environmental impacts necessitate location outside the urban footprint; and</i> – <i>there is an overriding need in the public interest;</i> ▪ <i>subdivision of land only if less than 100ha OR consistent with rural precinct OR necessary to accommodate emergency services, urban services etc;</i> ▪ <i>intent is to protect land from urban and rural residential development.</i>	<i>All areas within the rural study area not listed below.</i>

Land Use Designation	Key Policy Intent	Locations within Rural Study Area
<i>Rural Living Areas (RLA)</i>	▪ <i>residential development (other than a private residence on an existing lot) only permitted where:</i> – <i>locational requirements or environmental impacts necessitate location outside the urban footprint; and</i> – <i>there is an overriding need in the public interest;</i> ▪ <i>further rural residential development is permitted through infill and consolidation;</i> ▪ <i>rural residential can continue in accordance with local government planning scheme;</i> ▪ <i>development for urban purposes is impact assessable.</i>	▪ <i>D'Aguilar;</i> ▪ <i>Ocean View;</i> ▪ <i>Samford Valley.</i>
<i>Urban Footprint (UF)</i>	▪ <i>defines the extent of urban development by 2031;</i> ▪ <i>local governments are required to review locations of existing rural residential to identify opportunities for redevelopment for urban purposes, however, the regional plan intentions also include some specific expectations for rural towns that acknowledge the need to protect the rural character of villages.</i>	▪ <i>Woodford;</i> ▪ <i>D'Aguilar;</i> ▪ <i>Dayboro;</i> ▪ <i>Samford;</i> ▪ <i>Donnybrook;</i> ▪ <i>Toorbul;</i> ▪ <i>Sandstone Point/ Godwin Beach, Ningi;</i> ▪ <i>Beachmere.</i>

3.3.2.2 Communities of Interest

Communities of interest have been identified in order to provide a more fine-grained analysis of local housing characteristics and issues within the study area. These communities of interest⁵ were developed based primarily on the consideration of:

- location of higher order centres and the surrounding communities that draw on services within the higher order centre;
- geographic factors;
- transport routes; and
- boundaries of statistical data (such as Collections Districts and Statistical Local Areas).

⁵ The term 'communities of interest' is used to avoid confusion with 'place types', 'precincts' and 'catchments'.

The four communities of interest within the rural study area are:

- Woodford and Surrounds;
- Dayboro and Surrounds;
- Samford and Surrounds; and
- Coastal Towns and Surrounds.

These are identified spatially in the figure below.

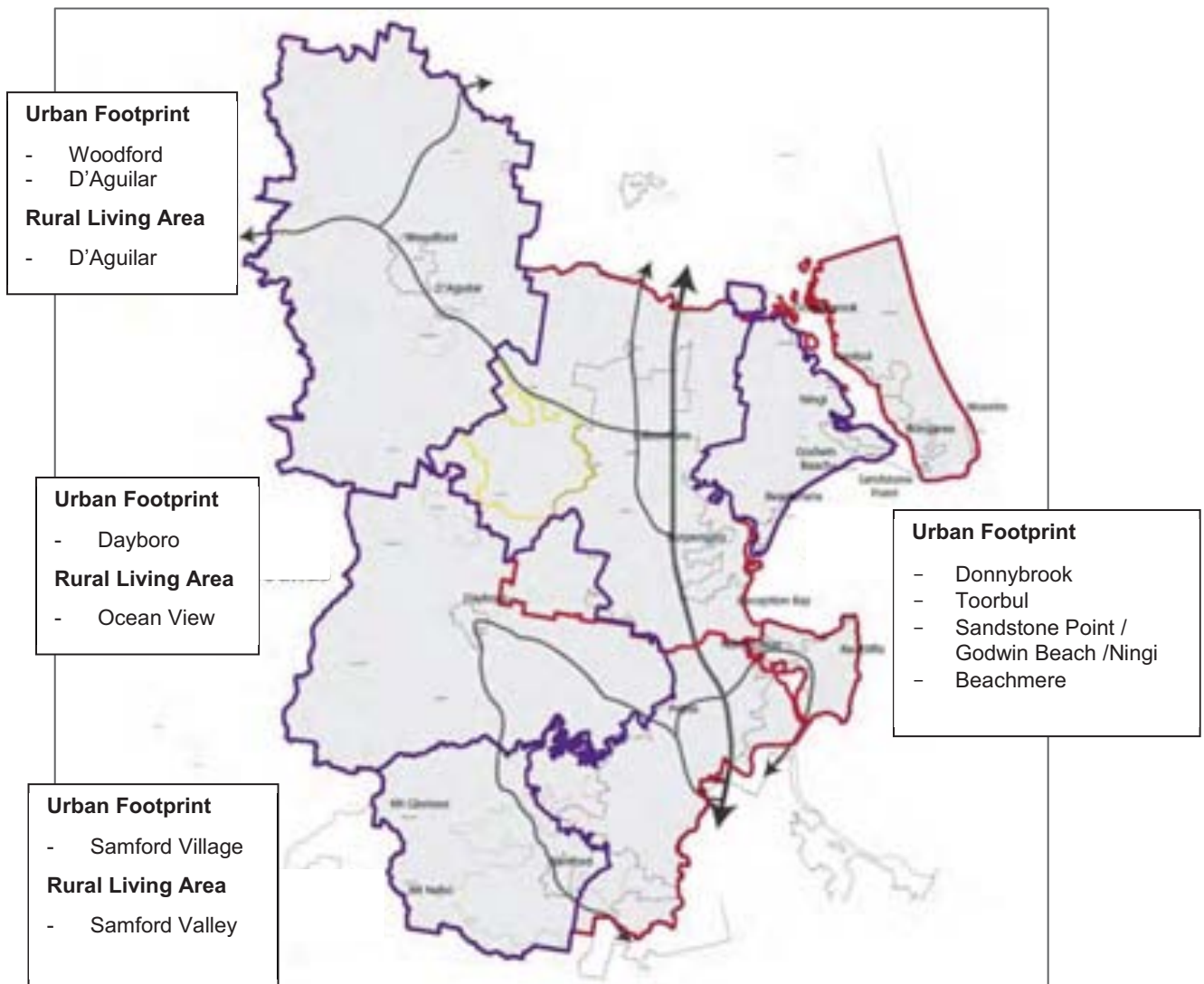


Figure 2: Map of Communities of Interest

3.3.3 Existing Demographic and Housing Characteristics

The following provides a brief snapshot of the demographic and housing characteristics data for each community of interest. A more detailed demographic and housing profile is provided in **Appendix C (a)**.

3.3.3.1 Woodford and Surrounds

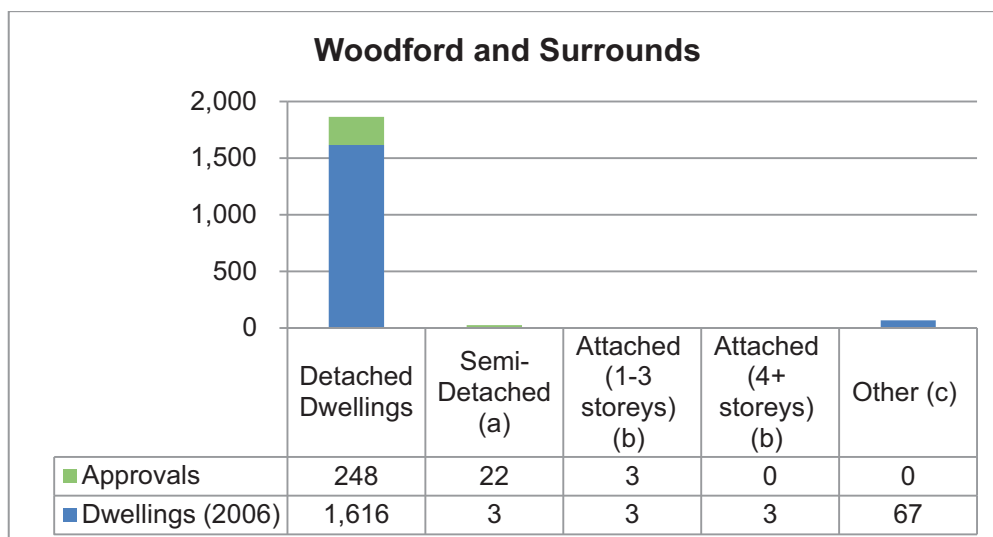
Demographic Snapshot

- An additional 821 people are projected over the next 20 years (from 7,077 people in 2011).
- 59% of the population resided in Woodford and D'Aguilar in 2006.
- Age profile identifies a high proportion of younger, middle aged and older males, which is presumed to reflect the prison being located within the area.
- Proportions of household types similar to Queensland but with lower proportion of lone person households (20%) and higher proportion of couple families with children (36%).
- Individual and household income lower than Queensland.



Housing Characteristics

- Appears to be a small portion of attached dwellings although figures are not reliable due to error in ABS count of housing types for Woodford (refer to figure below).
- Building approvals between Sept. Quarter 2006 and June Quarter 2011 show a total of 273 building approvals with 248 of these being for detached dwellings (refer figure below).
- Only one retirement village (containing 20 ILUs), which has an application for aged care with the Department of Housing and Aged Care (DHA) for an additional 85 low and high care beds.
- Comparatively low median weekly rent (\$182) and median monthly housing loan repayments (\$1,100).
- Higher proportion of dwellings fully owned (36%), similar proportion being purchased (41%), and lower proportion being rented (20%).
- No State Government housing.
- A household with a median income would consume 20% of income to rent a median priced rental property (comparatively affordable).



Source: ABS census data (2006) and OESR Buildings Approvals Data (2007–2011)

3.3.3.2 Dayboro and Surrounds

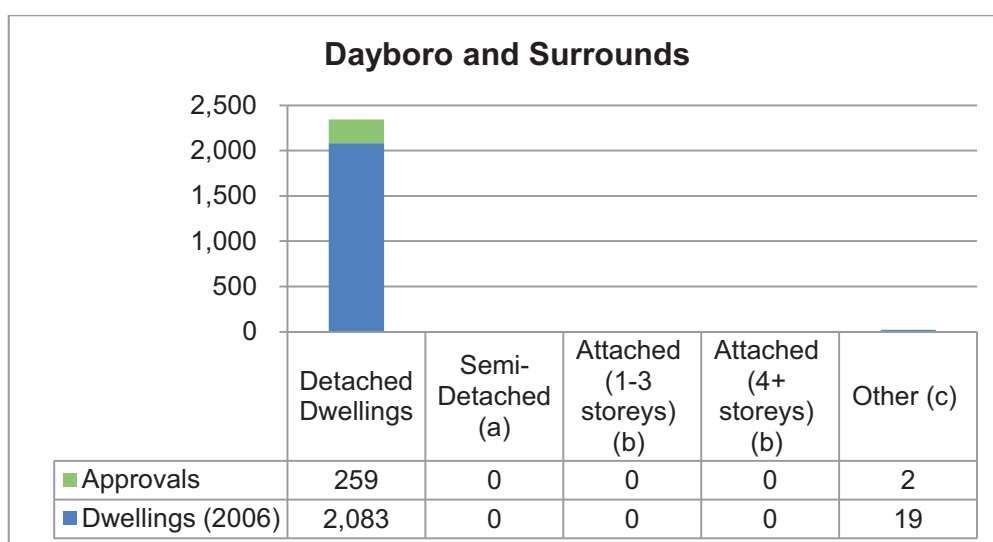
Demographic Snapshot

- An additional 550 people projected over the next 20 years (from 7,350 people in 2011).
- Just 13.7% of the population reside in Dayboro (2006).
- Age profile is fairly typical of peri-metropolitan rural townships with higher proportions of young and middle aged people (refer figure below).
- High proportion of couple families with children (46%) and without children (36%), low proportion of lone households (13%).
- Comparatively high individual and household income.
- The median individual income of \$550, which was relatively high compared with Woodford and Surrounds, the Brisbane Statistical Division (\$516) and Queensland (\$476).
- The median family income (\$1,367) and median household income (\$1,300) in this study area also relatively high.



Current Housing Stock

- Highly homogenous housing stock (very high proportion of detached dwellings at 99%, no attached dwellings, 4 semi-detached dwellings).
- Building approvals between Sept. Quarter 2006 and June Quarter 2011 show a total of 261 building approvals with 259 of these being for detached dwellings (refer figure below).
- No retirement village or aged care accommodation.
- Median weekly rent (\$212) and monthly housing loan repayments (\$1,300), similar to Brisbane and Qld.
- High proportion being purchased (50%), high proportion fully owned (37%) and very low proportion being rented (9%).
- No State Government housing.
- A household with a median income would consume 16.3% of income to rent a median priced rental property (more affordable compared with Woodford) due to higher incomes.

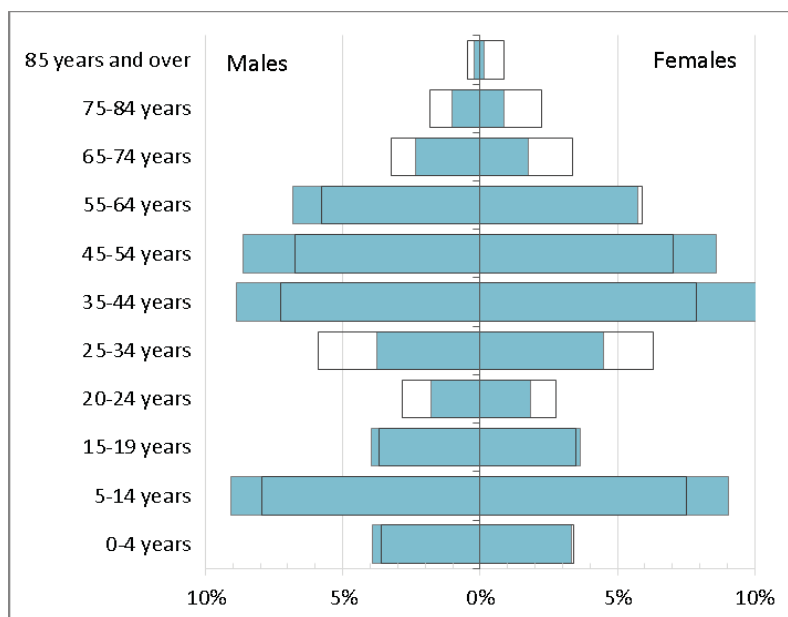


Source: ABS census data (2006) and OESR Buildings Approvals Data (2007–2011)

3.3.3.3 Samford and Surrounds

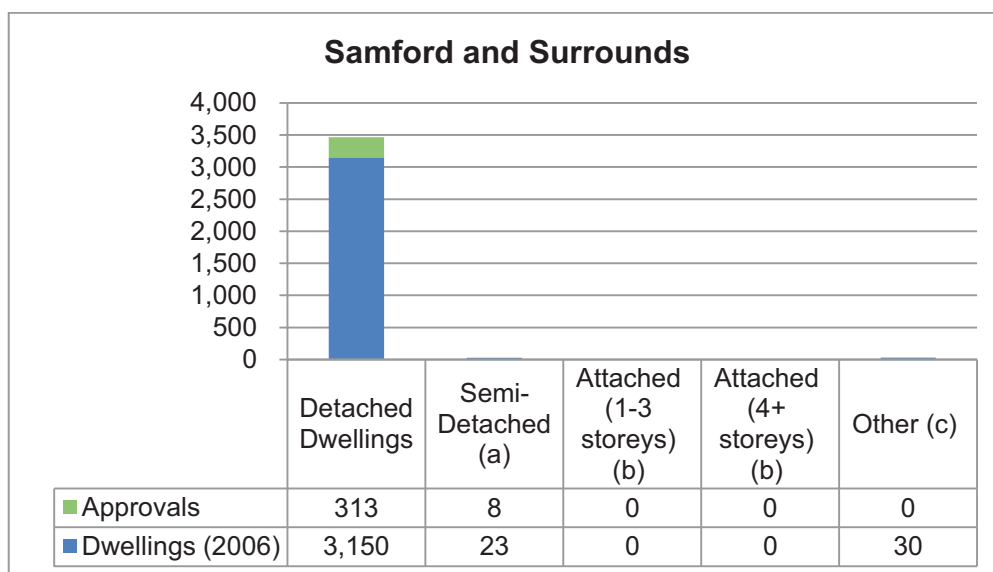
Demographic Snapshot

- An additional 680 people projected over the next 20 years (11,490 people in 2011).
- 12% of the population reside in Samford, Mt Nebo or Mt Glorious.
- Age profile similar to Dayboro and Surrounds (refer figure below).
- Very low proportion of lone person (11%) and one parent (7%) households.
- High proportion of couple families with children (51%) and high proportion of couples without children (31%).
- Individual and household income significantly higher.



Current Housing Stock

- Like Dayboro, very high proportion of detached dwellings (98%) compared with Qld (80%).
- Small number of semi-detached dwellings (23) in 2006.
- Building approvals between Sept. Quarter 2006 and June Quarter 2011 show a total of 321 building approvals with 313 of these being for detached dwellings (refer figure below).
- One retirement village providing 26 independent living units (ILUs).
- High median weekly rent (\$238) and monthly housing loan repayment (\$1,674).
- High proportion of dwelling being purchased (52%) and fully owned (36%), with very low proportion of renters (10%).
- No State Government housing.
- A household with a median income would consume 14% of income to rent a median priced rental property - most affordable compared with Woodford and Surrounds and Dayboro and Surrounds due to high to very high incomes rather than affordable housing stock.



Source: ABS census data (2006) and OESR Buildings Approvals Data (2007–2011)

3.3.3.4 Coastal Towns and Surrounds

Demographic Snapshot

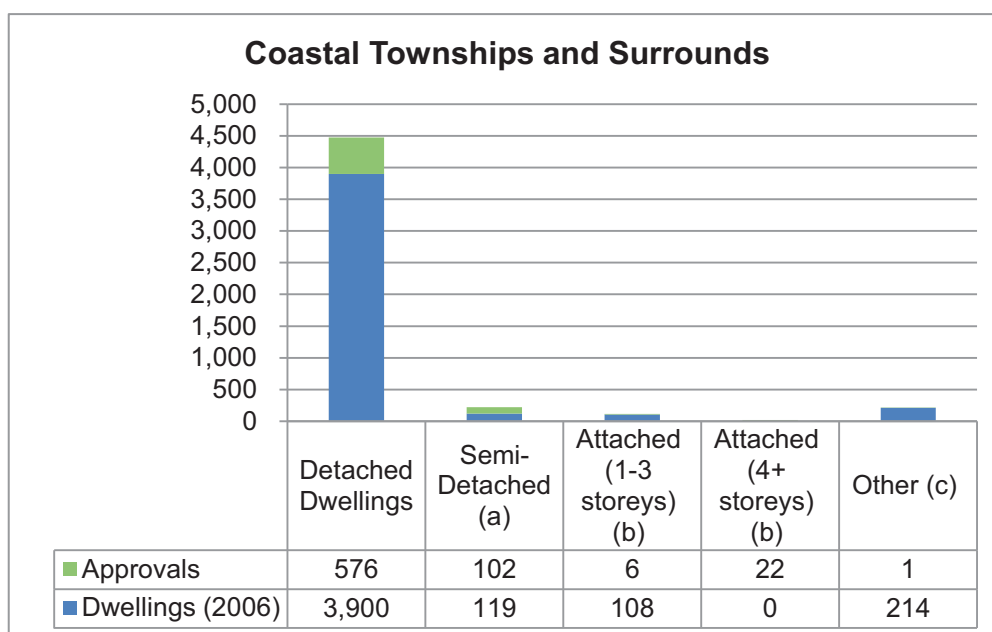
- An additional 2,709 people projected over the next 20 years (from 13,695 people in 2011).
- Approximately 73% of the population reside in the main centres of Sandstone Point, Beachmere, Ningi, Toorbul, Donnybrook and Godwin Beach.
- Age profile clearly shows much higher proportions of people in older age groups and lesser proportions of people in younger age groups compared with MBRC (refer figure below).
- High proportions of couple families without children (40%) compared with Qld (29%), low proportions of couple families with children (25%) compared with Qld (31%).
- Proportion of lone person households are similar to Qld.
- Individual and household income lower than all of the other communities of interest and Qld.



Current Housing Stock

- High proportion of detached dwellings (90%), compared with Qld (80%), although not as high as other communities of interest.
- Comparatively higher number of semi-detached dwellings (119) and attached dwellings (441) in 2006.
- Building approvals between Sept. Quarter 2006 and June Quarter 2011 show a total of 707 building approvals with 576 of these being for detached dwellings (refer figure below).
- Two retirement villages identified in the study, located at Beachmere (54 ILUs existing with 69 more planned) and Sandstone Point (75 ILUs existing and 76 more planned).
- Median weekly rent (\$207) is comparable to Qld (\$200) and higher than Woodford and Surrounds (\$182). Median monthly housing loan repayments (\$1,172) are lower than Qld (\$1,300) and other communities of interest except for Woodford and Surrounds.
- High proportion of dwellings are fully owned (42%) compared with Qld (32%) and a lower proportion are being purchased (30%) compared with all other communities of interest. There is also a high proportion being rented compared with other communities of interest.

- There are 38 social housing dwellings located in Beachmere (30 dwellings), Ningi (4 dwellings) and Sandstone Point (4 dwellings).
- A household with a median income would consume approximately 28% of income to rent a median priced rental property, which is close to a proportion that is considered to be housing stress (i.e. 30% of income).



Source: ABS census data (2006) and OESR Buildings Approvals Data (2007–2011)

3.3.4 Estimate of Dwelling Demand

The purpose of this component of work is to determine the total number of dwellings projected to be required to 2031, as well as the types of dwellings likely to be required to match the needs of future households. To arrive at these projections, a series of calculations were undertaken which have been described in Section 3.3.1.2 above and in further detail in **Appendix C (d)**. The output is a 'target scenario', which provides an estimate of the total number of dwellings required by 2031 by dwelling type.

Demand for dwellings (number and type) have been estimated based on projections of household type and assumptions about their choices for different dwelling types. It is noted, however, that existing availability of different housing types is a key factor in the dwelling choices made by households. The task of estimating demand requires an analysis of the extent to which households would change their dwelling preference away from separate detached dwellings if a wider range of housing types (greater housing choice) were available.

The modelling included in the methodology was based on assumptions identified in discussions with Council officers aimed at identifying a 'target scenario' for adjusting currently identified trends in housing choices. The target scenario distributes the total projected dwelling demand across a range of dwelling types including (i) semi-detached (one and two storey) houses and (ii) flats, units and apartments, in a way which is considered by Council to reflect an achievable change from current dwelling demand trends.

The results of this exercise are summarised in the tables below, which show the number of dwellings projected for each community of interest by 2031 by dwelling type and household type and the additional number of dwellings required by 2031, factoring in building approvals⁶ granted between September Quarter 2006 and June Quarter 2011⁷.

It is noted that subsequent to this analysis, the OESR produced revised population projections (in 2011) which were not available at the time this report was prepared. The 2011 projections are a downward revision of the projections used in this report, hence the following analysis may be an over estimate of dwelling demand.

3.3.4.1 Woodford and Surrounds

Projected Dwelling Demand

Total Dwellings by 2031 (target scenario)

	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	845	710	279	524	57	150	2,564
Semi-detached, row or terrace house, townhouse etc.	25	24	10	30	1	3	93
Flat, unit or apartment	6	2	2	6	0	1	17
Other dwellings and dwellings structure not stated	26	22	14	45	5	5	116
Total	902	758	305	605	63	158	2,791

Additional Dwellings Required: 2011–2031 (target scenario)

	Total Dwellings Required (2006–2031)	Minus Building Approvals (Sept 2006 to June 2011)	Estimate of Additional Dwellings Required (2011–2031)
Separate house	852	248	604
Semi-detached, row or terrace house, townhouse etc.	87	22	65
Flat, unit or apartment	17	3	14
Other dwellings and dwellings structure not stated	44	0	44
Total	1,001	273	725

⁶ This approach assumes that building approvals granted during this period have been converted into dwellings, which may overstate the total number of existing dwellings. It is recommended that the model be re-run when updated dwelling structure data is released with the 2011 census.

⁷ ABS statistics for the 2011 census post-date this modelling and are not reflected in these results.

Summary of 2031 total dwelling stock under target scenario:

- separate houses – 2,564 dwellings (91% of dwelling stock);
- semi-detached houses – 93 dwellings (3.3% of dwelling stock);
- flats, unit and apartments – 17 dwellings (0.6% of dwelling stock).

Projected Residential Aged Care Demand

According to residential aged care benchmarking undertaken for this project (refer to **Appendix C (a)**), there is a current need for 19 low care beds and 19 high care beds in order to achieve the Federal Department of Health and Ageing target.

This is estimated to increase to 45 low care beds and 45 high care aged beds by 2031, which could be accommodated within one facility based on the average size of residential aged care facilities in the MBRC area.

3.3.4.2 Dayboro and Surrounds

Projected Dwelling Demand

Total Dwellings by 2031 (target scenario)

	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	998	1,082	183	407	47	71	2,787
Semi-detached, row or terrace house, townhouse etc.	29	30	7	17	1	1	85
Flat, unit or apartment	7	3	1	4	0	0	17
Other dwellings and dwellings structure not stated	11	4	8	0	0	0	22
Total	1,045	1,119	199	428	48	72	2,911

Additional Dwellings Required: 2011–2031 (target scenario)

	Total Dwellings Required (2006–2031)	Minus Building Approvals (Sept 2006 to June 2011)	Estimate of Additional Dwellings Required (2011–2031)
Separate house	659	259	400
Semi-detached, row or terrace house, townhouse etc.	85	0	85
Flat, unit or apartment	17	0	17
Other dwellings and dwellings structure not stated	6	2	4
Total	767	261	506

Summary of 2031 total dwelling stock under target scenario:

- separate houses – 2,787 dwellings (95% of dwelling stock);
- semi-detached houses – 85 dwellings (2.9% of dwelling stock);
- flats, unit and apartments – 17 dwellings (0.6% of dwelling stock).

Projected Residential Aged Care Demand

According to residential aged care benchmarking undertaken for this project (refer to **Appendix C (a)**), there is a current need for 15 low care beds and 15 high care beds in order to achieve the Federal Department of Health and Ageing target.

This is estimated to increase to 35 low care beds and 35 high care aged beds by 2031, which could be accommodated within one facility based on the average size of residential aged care facilities in the MBRC area.

3.3.4.3 Samford and Surrounds

Projected Dwelling Demand

Total Dwellings by 2031 (target scenario)

	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	1,359	1,816	248	452	73	99	4,046
Semi-detached, row or terrace house, townhouse etc.	55	55	9	31	1	2	153
Flat, unit or apartment	14	6	2	5	0	0	28
Other dwellings and dwellings structure not stated	6	7	4	19	0	4	40
Total	1,434	1,884	262	507	74	105	4,266

Additional Dwellings Required: 2011–2031 (target scenario)

	Total Dwellings Required (2006–2031)	Minus Building Approvals (Sept 2006 to June 2011)	Estimate of Additional Dwellings Required (2011–2031)
Separate house	825	313	512
Semi-detached, row or terrace house, townhouse etc.	132	8	124
Flat, unit or apartment	25	0	25
Other dwellings and dwellings structure not stated	11	0	11
Total	993	321	672

Summary of 2031 total dwelling stock under target scenario:

- separate houses – 4,046 dwellings (94.8% of dwelling stock);
- semi-detached houses – 153 dwellings (3.6% of dwelling stock);
- flats, unit and apartments – 28 dwellings (0.6% of dwelling stock).

Projected Residential Aged Care Demand

According to residential aged care benchmarking undertaken for this project (refer to **Appendix C (a)**), there is a current need for 21 low care beds and 21 high care beds in order to achieve the Federal Department of Health and Ageing target.

This is estimated to increase to 46 low care beds and 46 high care aged beds by 2031, which could be accommodated within one facility based on the average size of residential aged care facilities in the MBRC area.

3.3.4.4 Coastal Towns and Surrounds

Projected Dwelling Demand

Total Dwellings by 2031 (target scenario)

	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	2,732	1,231	572	1,328	213	277	6,354
Semi-detached, row or terrace house, townhouse etc.	195	40	25	157	8	10	436
Flat, unit or apartment	64	12	15	158	1	7	257
Other dwellings and dwellings structure not stated	130	13	14	228	6	16	407
Total	3,121	1,296	626	1,871	229	310	7,453

Additional Dwellings Required: 2011–2031 (target scenario)

	Total Dwellings Required (2006–2031)	Minus Building Approvals (Sept 2006 to June 2011)	Estimate of Additional Dwellings Required (2011–2031)
Separate house	2,285	576	1,709
Semi-detached, row or terrace house, townhouse etc.	324	102	222
Flat, unit or apartment	148	28	120
Other dwellings and dwellings structure not stated	191	1	190
Total	2,948	707	2,241

Summary of 2031 total dwelling stock under target scenario:

- separate houses – 6,354 dwellings (85.2% of dwelling stock);
- semi-detached houses – 436 dwellings (5.8% of dwelling stock);
- flats, unit and apartments – 257 dwellings (3.4% of dwelling stock).

Projected Residential Aged Care Demand

According to residential aged care benchmarking undertaken for this project (refer to **Appendix C (a)**), there is a current need for 82 low care beds and 82 high care beds in order to achieve the Federal Department of Health and Ageing target.

This is estimated to increase to 181 low care beds and 181 high care aged beds by 2031, which would be accommodated within three to four facilities based on the average size of residential aged care facilities in the MBRC area.

3.3.4.5 Need for Review of Housing and Residential Aged Care Demand – Coastal Town and Surrounds

After reviewing the outcomes of the projected dwelling and residential aged care demand for the Coastal Townships and Surrounds community of interest, and discussing these projections with Council's project team and the broader consultant project team, a number of issues have been identified.

As detailed elsewhere in this report, Toorbul and Donnybrook are significantly constrained because there is no reticulated sewerage system and the costs of sewerage for these areas is high due to the low elevation and proximity to Pumicestone Passage. The continuation of the use of domestic sewage treatment plants (STPs) is to be strongly discouraged in these locations because of the potential for relatively high release of nutrients to Pumicestone Passage through the predominantly sandy soils of the localities. This passage has poor tidal flushing and is already significantly degraded because of poor water quality.

Additionally, there are significant areas in this locality that are identified as having strong acid sulfate soil potential (DNRM&W 2006) and would present a major constraint to future land use changes in the area.

In summary, based on the project team's knowledge of land constraints in this area, the projected number of dwellings provided above is considered unachievable in this location due to the following land and infrastructure constraints:

- the majority of the townships are unsewered, with the exception of Beachmere and Ningi;
- Pumicestone Passage has limited capacity to assimilate increased nutrient run off;
- a high prevalence and risk associated with acid sulfate soils;
- location in proximity to the coast and the associated coastal management issues this presents (e.g. from storm tide inundation and erosion); and
- the townships are disconnected from employment and social infrastructure.

Given the range and severity of land and infrastructure constraints in the Coastal Towns and Surrounds community of interest, the OESR projections are considered inappropriate for estimating dwelling demand in this location.

A more detailed assessment of land constraints is required to determine what level of population growth, if any, can be supported. Until this assessment has been carried out, Council should consider limiting capacity for future residential growth in coastal areas.

3.3.5 Estimate of Residential Land Supply

The following analysis is intended to provide a preliminary estimate of the possible extent of land available within the study area to accommodate future residential development.

The suitability of the land for this purpose, including land constraints assessment (e.g. such as flood modelling) has not been taken into consideration in these estimates. Therefore, for planning scheme purposes, a more detailed analysis is likely to be required in order to more accurately calculate the supply of residential land available, particularly within the main townships of Woodford, Dayboro, Samford and the coastal townships.

3.3.5.1 Regional Landscape and Rural Production Area

In the absence of additional planning scheme controls, the construction of additional housing within the Regional Landscape and Rural Production Area (RLRPA) is likely to occur where there is an existing vacant lot, as this would not trigger assessment under the SEQ Regional Plan. As indicated in the rural land analysis (refer to section 3.3), there is likely to be an uptake of lifestyle living on existing fragmented rural lots in this area.

The precincts identified by LRAM as having the greatest potential for uptake of lifestyle residential allotments are indicated in table below, along with an estimate of the number of additional houses that could be accommodated on existing lots in these areas.

Rural Land Analysis of Uptake for Lots for Residential Development in RLRPA

Rural Precinct	Summary of LRAM Analysis	Potential for Additional Housing
Ranges	Most heavily subdivided area is Mount Glorious, Mount Glorious Road and Cedar Creek, where lot sizes are as low as 5ha.	90
High Hills	The precinct contains 364 lots. With 60% of these being built on. The most heavily subdivided locations are located in Wamuran, Neurum, Closeburn and Dayboro. Locations where current lot size is less than 30ha are likely to see rapid conversion to rural living type uses.	145
Foothills	Land in this category is largely freehold. Better access and utility services (compared with the hills or ranges) and the average lot size of 21ha is more consistent with rural living outcomes than lower intensity grazing.	638

Rural Precinct	Summary of LRAM Analysis	Potential for Additional Housing
<i>Uplands and Low Hills</i>	The locations of Campbell Pocket, Dayboro North, Kobble Creek, Kurwongbah, Neurum, Rocksberg have been heavily subdivided and have lot sizes averaging between 10-55ha.	625
<i>Undulating Plains</i>	This precinct is located close to urban and village areas and along major access routes. The pineapple industry in the Wamuran area of the precinct is likely to face rural living pressures, due to challenges facing the industry and its location near networks and services. In this area, 375 lots out of 668 (56%) appear to be built on already. A majority proportion of this land will be evaluated through West Caboolture West Master Planned Area planning.	293
Total		1,791

Based on the above figures, it is estimated that up to 1,791 additional dwellings could potentially be accommodated on existing lots within selected precincts of the RLRPA. This represents over 40% of the overall projected additional dwelling demand (4,144 dwellings) in the four communities of interest to 2031.

The issue for Council to consider is how this pressure for the establishment of dwellings on existing isolated lots can be managed and what strategies can be implemented through the planning scheme and other mechanisms to assist in redirecting this demand to locations which are better situated with regard to access to services and employment.

3.3.5.2 Rural Living Area and Urban Footprint

As described in section 3.3.1.2, an estimate of the residential land supply (including land with outbuildings) within the Urban Footprint and Rural Living Areas has been undertaken using Council's rates database⁸. This includes all vacant land zoned for rural, rural residential and residential purposes.

It is recognised that a portion of this land may be taken up by the dwellings granted building approval in the period between the September Quarter 2006 and June Quarter 2011 (refer to Section 3.3.4), however, for the purpose of this analysis it has been assumed that these dwellings have already been constructed⁹. In addition, various constraints may also affect land availability. Therefore, the below estimate of residential land supply may be overstated.

⁸ Note: this assessment was reliant on information supplied by Council. Council has acknowledged that the accuracy / extent of this information cannot be guaranteed.

⁹ It is recommended that the model be re-run when updated dwelling structure data is released with the 2011 census.

The table below summarise the area of vacant land for each Urban Footprint and Rural Living Area for the four communities of interest.

Estimate of Vacant Land by Community of Interest and SEQ RP Designation

Community of Interest	Locality	SEQ RP Category	Area of Vacant Land (ha)*
Woodford and Surrounds	Woodford	UF	199.43
	D'Aguilar	UF	9.97
	D'Aguilar	RLA	101.32
Dayboro and Surrounds	Dayboro	UF	29.47
	Ocean View	RLA	254.39
Samford and Surrounds	Samford Village	UF	39.46
	Samford Valley	RLA	617.62
Coastal Towns and Surrounds	Donnybrook	UF	2.16
	Toorbul	UF	1.55
	Sandstone Point / Godwin Beach / Ningi	UF	111.81
	Beachmere	UF	43.02

* Includes land registered as vacant and land with an outbuilding on Council's rates database that is located within a rural, rural residential, park residential or residential zone under the relevant planning scheme.

3.3.6 Spatial Distribution of Residential Growth and Estimate of Land Capacity

3.3.6.1 Assumptions

The preceding sections of this report have provided an estimate of:

- the number and type of dwellings projected to be required for each community of interest by 2031 (section 3.3.4);
- the number of additional dwellings that could be established on existing lots within the Regional Landscape and Rural Production Area (RLRPA) (section 3.3.5);
- the area of land that may have potential to be developed for residential purposes within the Rural Living Area (RLA) and Urban Footprint (UF) for each community of interest (section 3.3.5).

In order to assess the adequacy of residential land supply to meet projected residential land demand within the rural townships (excluding Coastal Towns and Surrounds), it is necessary to make assumptions about the distribution of population growth across the RLRPA, RLA and UF areas. Specifically, it has been assumed that Council is unlikely to intervene to prevent or limit the establishment of dwellings on existing vacant lots within the RLRPA. As indicated in section 3.3.5.1, in the absence of any specific planning intervention, development of further separate detached dwellings within the RLRPA can be expected to absorb a significant portion of population growth projected for the study area.

Notwithstanding this acknowledgement, in developing a 'preferred scenario'¹⁰ for the allocation of projected growth in rural areas, a policy of directing growth into townships was considered to provide the best planning outcome for the following reasons:

- better access to facilities and services including employment opportunities, community infrastructure and public transport;
- ability to accommodate urban densities and consolidate future growth;
- connections available to reticulated water and sewerage infrastructure;
- reduced impact on water quality by minimising additional dwellings on isolated lots that will require on-site sewage treatment;
- reduced isolation and better connections to social support networks;
- generally lower level of risk from natural hazards such as bushfire and landslide compared with more remote locations;
- less impact on natural resource values in RLRPA, including agricultural land resources; and
- a more environmentally sustainable settlement pattern.

On this basis, the **preferred scenario** identified in discussions with Council is as follows:

Future growth in the RLA and RLRPA is managed and growth is primarily accommodated within the main townships of Woodford, Dayboro and Samford.

Bearing in mind the likelihood that there will continue to be a take-up of existing rural and rural residential lots, this preferred scenario is unlikely to represent a realistic outcome, but indicates potential land supply issues if a greater proportion of the population is to be accommodated in towns in the future.

3.3.6.2 Estimate of Land Capacity Required to Support Residential Growth

To achieve the preferred scenario outlined above, investigations would be required to identify ways of accommodating additional growth within or as logical extensions of the existing towns, giving consideration to opportunities within the Urban Footprint under the SEQ Regional Plan and assessing any need for extension of that footprint.

The tables below provide a high level assessment of the existing land capacity within the Urban Footprint to accommodate residential growth. They provide an assessment of potential land requirements to achieve Council's preferred scenario of accommodating the majority of new housing within the towns. These calculations exclude an assessment of potential for further subdivision of existing rural residential lots and capacity for redevelopment or infill within townships.

Further, an assessment of the proportion of projected growth likely to be taken up on existing fragmented lots in RLRPA and likely to reduce any shortfall, has not been factored into the below calculations. As a consequence, these figures are likely to overstate the potential land area required to accommodate growth.

¹⁰ The 'preferred scenario' relates to the preferred distribution of population growth within each community of interest. It is distinct from the 'target scenario' described in Section 3.3.4, which refers to the targeted mix of dwelling types. This was determined through discussions between the project team and Council officers.

As previously noted, subsequent to this analysis the OESR produced revised population projections (in 2011) which were not available at the time this report was prepared.

The 2011 projections are a downward revision of the projections used in this report, hence the following analysis may rely on an over estimate of dwelling demand.

In addition, this assessment does not incorporate any consideration of how and where this growth would best be accommodated within each town. It is acknowledged that further detailed planning will be necessary in order to balance growth in towns with the protection of town character, management of constraints, maximisation of accessibility and a range of other normal local area planning considerations.

Woodford and Surrounds

Woodford and Surrounds – Estimate of Residential Land Demand (2031)

Dwelling Type	Projected Dwellings	Density Assumption (dw/ha)	Estimated Land Area (net)	Estimated Land Area (gross)*
Separate house	604	10	60.4	78.52
Semi-detached, row or terrace house, townhouse etc.	65	23	2.83	3.68
Flat, unit or apartment	14	23	0.61	0.79
Other dwellings and dwellings structure not stated	44	10	4.4	5.72
<i>Total</i>	725	-	68.24	88.71

** Estimated based on 30% increase on net land calculation*

Compared against the estimate of vacant land (provided in section 3.3.5.2) there appears to be an adequate supply of residential land (i.e. demand of 88.71ha vs supply of 199.43ha) to accommodate the 'preferred scenario' population growth within the Woodford Urban Footprint.

Dayboro and Surrounds

Dayboro and Surrounds – Estimate of Residential Land Demand (2031)

Dwelling Type	Projected Dwellings	Density Assumption (dw/ha)	Estimated Land Area (net)	Estimated Land Area (gross)*
Separate house	400	10	40.0	52.0
Semi-detached, row or terrace house, townhouse etc.	85	23	3.70	4.81
Flat, unit or apartment	17	23	0.74	0.96
Other dwellings and dwellings structure not stated	4	10	0.4	0.52
<i>Total</i>	506	-	44.84	58.29

** Estimated based on 30% increase on net land calculation*

Compared against the estimate of vacant land (provided in section 3.3.5.2) there appears to be a potential shortfall of residential land of approximately 28.82ha (i.e. demand of 58.29ha vs supply of 29.47ha) to accommodate the 'preferred scenario' population growth within the Dayboro Urban Footprint.

Samford and Surrounds

Samford and Surrounds – Estimate of Residential Land Demand (2031)

Dwelling Type	Projected Dwellings	Density Assumption (dw/ha)	Estimated Land Area (net)	Estimated Land Area (gross)*
Separate house	512	10	51.2	66.56
Semi-detached, row or terrace house, townhouse etc.	124	23	5.39	7.0
Flat, unit or apartment	25	23	1.09	1.42
Other dwellings and dwellings structure not stated	11	10	1.1	1.43
<i>Total</i>	672	-	58.78	76.41

* Estimated based on 30% increase on net land calculation

Compared against the estimate of vacant land (provided in section 3.3.5.2) there appears to be a shortfall of residential land of approximately 36.95ha (i.e. demand of 76.41ha vs supply of 39.46ha) to accommodate the 'preferred scenario' population growth within the Samford Village Urban Footprint.

3.3.6.3 Summary of Assessment of Residential Land Capacity

The residential assessment provided above has considered the potential supply and demand for housing within Moreton Bay's rural townships. The assessment has been based on Council's desire to accommodate more growth within the townships rather than a continuation of the spread of housing through rural areas and to achieve a broader range of housing options to match the needs of the population within the communities of interest examined.

While this assessment indicates some potentially significant shortfalls of residential land to support the preferred strategy, it is likely to be reduced by:

- the likelihood of uptake of housing on existing lots in the RLRPA;
- opportunities for infill within existing townships; and
- the potential for re-development and re-subdivision of existing housing stock.

Importantly, the assessment does not draw a conclusion on the optimum extent of growth which might ultimately be sought for each town. Nevertheless, the assessment does point to the requirement for more detailed local area planning to examine opportunities and constraints and to establish appropriate local strategies to accommodate future housing needs.

3.4 Ecological, Scenic and Open Space Assessment

3.4.1 Ecological Review

3.4.1.1 Information Reviewed

The following legislation has been reviewed in relation to ecological constraints within the study area:

- *Vegetation Management Act 1999; (VMA)*
- *State Planning Policy (2/10): Koala Conservation in Southeast Queensland. SEQ Koala Protection Area Koala Habitat Values (SPP). May 31 2010 (SEQKPA v.1.2);*
- *South East Queensland Koala Conservation. State Planning Regulatory Provisions. (SPRP) Assessable Development Area Koala Habitat Values Map May 31 2010 (SEQKPA v.1.2);*
- *Queensland Coastal Plan January 2012;*
- *Environmental Protection (Water) Policy 2009 (SPP 4/10 Healthy Waters);*
- *Biodiversity Offsets Policy October 2011;*
- *Caboolture Nature Conservation Overlay, Caboolture Planning Scheme.*

Vegetation Management Act 1999

Although the Department of Environment and Resource Management's (DERM) State biodiversity interests are typically represented by the Areas of Ecological Significance (AES) Mapping, a review of State vegetation management issues (Vegetation Management Act 1999) was undertaken in order to provide base information against which to compare and contrast the likely extent, degree, nature and relative levels of protection of ecological features and functions at the State and Local Government Level (areas for which statutory protection levels and likely values are readily quantifiable).

The *VMA 1999* protects the extent of high value remnant vegetation (those areas containing 'Endangered' and 'Of Concern' Regional Ecosystems) in non-urban areas and, importantly, protects connectivity and ecosystem function of mapped remnant vegetation (including those areas containing 'Least Concern' Regional Ecosystems) within non-urban areas, with clearing limits imposed in terms of remnant size and shape. Areas mapped as supporting 'Endangered' or 'Of Concern' Regional Ecosystems within rural areas are a hard constraint, in that they cannot be cleared except for the purposes of 'essential infrastructure'. These areas are highlighted using Photoshop with purple brush strokes, in Figure 1 (Appendix D).

'Least Concern' Regional Ecosystems are generally able to be cleared in rural areas, but where they are associated with waterways, there are significant flow on effects under the Regional Vegetation Management Code, which makes these areas almost impossible to clear. Accordingly, the broad connectivity and ecosystem function of mapped remnant vegetation within non-urban areas (including that associated with waterways) is reasonably expected to be retained throughout the region (except where extractive resources and other such impacts dictate otherwise).

Clearing of 'Endangered' and 'Of Concern' Regional Ecosystems for 'essential infrastructure' requires an offset. Offsets are to be in accordance with the Policy for Vegetation Management Offsets V.3 (30 September 2011). When offsetting for RoL or MCU, ecological equivalence is to be demonstrated by using the Ecological Equivalence Methodology.

State Planning Policy (2/10): Koala Conservation in Southeast Queensland. SEQ Koala Protection Area Koala Habitat Values (Koala SPP). May 31 2010 (SEQKPA v.1.2)

The Koala SPP covers 7 south east local government areas, defined as the South East Queensland Koala Protection Area, including MBRC. The Bushland Habitat and Suitable Rehabilitation areas illustrated in the *SEQ Koala Protection Area Koala Habitat Values* map do not have statutory protection but it is the state's intention that these areas are reflected within local government planning instruments.

South East Queensland Koala Conservation. State Planning Regulatory Provisions. (Koala SPRP) Assessable Development Area Koala Habitat Values Map May 31 2010 (SEQKPA v.1.2)

The SPRP provides statutory protection to koala habitat within the old Pine Rivers LGA. Koala Habitat Trees within Priority Koala Assessable Development Areas (PKADA) Bushland Habitat are not to be cleared, and, within Koala Assessable Development Area, Bushland Habitat is not to be cleared outside the urban footprint. Clearing of Koala Habitat Trees within High and Medium Value Rehabilitation Areas are to be offset.

Queensland Coastal Plan (January 2012) and SPP 3/11: Coastal Protection (Feb 2012)

As indicated previously, the Queensland Coastal Plan effectively repealed the State Coastal Management Plan 2002. Together with SPP 3/11 – Coastal Protection, the new coastal plan encourages nodal, rather than ribbon or linear, development along the coast, and places restrictions on development in areas of high ecological significance, and areas vulnerable to existing and projected future coastal hazard impacts.

Impacts on areas of High Ecological Significance (HES) (refer to Figure 3 – HES shown are those that are not already mapped as Endangered RE or DERM Wetland) require a biodiversity offset equal to or greater than the Ecological Equivalence of area to be impacted on (in accordance with the Biodiversity Offset Policy October 2011).

Environmental Protection (Water) Policy 2009 (SPP 4/10 Healthy Waters)

Environmental Values of 'Schedule 1' waters and 'High Ecological Value Waters' are to be enhanced or protected. Schedule 1 waters include:

- Caboolture River; Pine River and Redcliffe Creeks;
- Pumicestone Passage, including waters of Bribie Island, Bells, Coochin, Dux, Elimbah, Mellum, Ningi, and Tibrogargan Creeks; and
- the Stanley River.

DERM has mapped HEV waters and MBRC has a draft map of HEV waters.

Schedule 1 outlines the necessary water quality objectives to be achieved to protect or enhance those Environmental Values. The requirement to prepare a Total Water Cycle Management Plan is also a requirement of this policy and outlines how integrated water cycle management may assist in moving towards achieving the water quality objectives as defined in Schedule 1.

It is noted Council has already prepared a Total Water Cycle Management in accordance with this requirement.

Biodiversity Offsets Policy 2011

The Biodiversity Offset Policy (the Policy) is an offset policy under the Queensland Environmental Offsets Policy. The purpose of the Policy is to provide a framework for offsetting the unavoidable impacts of development, to ensure there is no net loss of biodiversity. The Policy is applicable to areas that have been identified as having 'State significance biodiversity values'. State significance biodiversity values have been derived from DERM's Area of Ecological Significance Mapping and Biodiversity Planning Assessments.

Land based offsets must demonstrate 'Ecological Equivalence' as prescribed in DERM's 'Ecological Equivalence Methodology'. Offsets are assessed against two criteria – ecological condition and special features.

Strategic Rehabilitation Areas are identified in the Area of Ecological Significance Mapping, and correlates with the 'special feature' - strategic ecological corridor.

DERM's Strategic Rehabilitation Areas and Ecological Corridors have been reviewed in conjunction with the VMA mapping, koala SPP mapping and protected areas to ascertain analogies and suggestions for a broad regional open space framework.

Caboolture Nature Conservation Overlay, Caboolture Planning Scheme

A comparison of the Caboolture Nature Conservation Overlay with VMA mapping was undertaken to identify areas mapped as 'Biodiversity Significance' that are vegetated (checked against Google Earth) but not mapped as a Regional Ecosystem or Open Space. These areas have been identified at the local level as significant but do not have and statutory protection. Some of these areas may be important in maintaining viable wildlife corridors at the local or regional level.

3.4.1.2 Ecological Findings

The following discussion refers to the figures in **Appendix D** of this report.

FIGURE 1 – VMA

FIGURE 1 highlights 'Endangered' and 'Of concern' remnant vegetation, and 'Least Concern' remnant vegetation supporting DERM wetlands, within rural areas. This overview map may also supplement as a biodiversity values and ecosystem function profile to inform the location of important corridors.

It is understood that once the local biodiversity corridor information for the Pine Rural Area is made available to Council (expected April 2012), the Caboolture Shire linkages and Pine Rural Area corridors should be reviewed together and long term regional biodiversity nodes and corridors confirmed.¹¹

In and of itself, the mapping indicates potential for strong north-south connectivity along the D'Aguilar Ranges (as far north as Mount Mee), within and adjacent the western extent of the study area, but reveals increased fragmentation between Mount Mee and Stanley River, from which specific ecological corridors and strategic rehabilitation areas might be expected to emerge.

Broader mapping at the South East Queensland regional scale suggests that the above north-south connection is further reinforced by the mapped values within adjacent local authority areas, including Brisbane City Council to the south and Somerset Regional Council to the west.

FIGURE 2 – VMA 1999 and Koala SPP/SPRP 2010

Overlaying the *VMA 1999* mapping with mapped Bushland Habitat from the Koala SPP *Koala Protection Area Koala Habitat Values* map confirms that, at a broad regional level throughout non-urban areas, mapped bushland habitat generally coincides with Remnant and Regrowth Vegetation, whose ecosystem function is protected. Thus, notwithstanding the significant clearing restrictions throughout Koala Assessable Development Areas (generally within the former Pine Rivers Shire boundaries), Koala Bushland Habitat throughout non-urban areas is expected to be largely protected by the mapping and provisions of the *VMA 1999*, and the purpose of *SPP2/10*, to restrict clearing of non-juvenile koala habitat trees from bushland habitat, shall be furthered.

FIGURE 3 – Coastal HES

The *VMA 1999* mapping was overlayed with the 'Areas of High Ecological Significance' (HES) from the *Coastal Plan Map 1 – South East Queensland*. While the mapping in the Coastal Plan is of low resolution, it appears the majority of HES areas mapped in the rural area, are located between Caboolture and Pumicestone Passage. A high percentage of these areas are also mapped as remnant vegetation, and have protection under the *VMA 1999*.

FIGURE 4 – Strategic Rehabilitation Areas

DERM's Strategic Rehabilitation Areas (a truncated version of DERM's Strategic Ecological Corridors, not shown), have been overlayed with the earlier state level mapping, to provide an insight into how vegetation protected under *VMA 1999* and the Koala SPP/SPRP contributes to the states intent for ecological corridors through the MBRC rural areas. It appears to suggest a framework for a broad regional open space network.

¹¹ See recommendations in Section 5.

Along with the major waterways, a terrestrial corridor has been mapped from the D'Aguilar Range, west of Mount Pleasant, north to Beerburrum State Forest. Such a corridor might begin to address the missing north-south linkage brought about by the increased fragmentation between Mount Mee and the Stanley River, as detected within *VMA 1999* and *SPP2/10* mapping.

However, existing clearing and the current and future development of a Key Resource Area, to the east of Delaneys Creek, could significantly affect that connectivity and limit the functionality of such a corridor.

Subject to more detailed investigations, two alternative north-south corridors, which also respond to this fragmentation, might be located to the east and west of Neurum (within vegetated hills and high value habitat to the east, or along tributaries of Stanley River to the west).

The former of these two alternatives appears to be supported by the *MBRC High Ecosystem Function Map* and all three alternatives appear to have been acknowledged, at least indicatively, within the Caboolture Shire Plan *Western Planning Area Overlay Map WO9 Nature Conservation*.

As previously mentioned, it is understood that once the local biodiversity corridor information for Pine Rural Area is made available to Council (Expected April 2012), the Caboolture Shire linkages and Pine Rural Area corridors should be reviewed together and long term regional biodiversity nodes and corridors confirmed.

FIGURE 5 – Example of Koala SPP Rehabilitation links

Areas of SPP2/10 Rehabilitation Habitat were reviewed in order to determine how receptive the above ecological corridors were to offset of bushland habitat. Generally, the outer extents of waterway corridors tended to possess the necessary factors to support koala habitat, whereas the terrestrial connection (Mount Pleasant to Beerburrum State Forest) did not appear to contain significant areas of high or medium value rehabilitation habitat.

FIGURES 6 & 7 show maps containing overlays of raw mapping for reference.

FIGURES 8 & 9 – Linkages

A few key streams and vegetated areas that link urban and rural areas have also been determined from ecological data, although it is anticipated that all streams and a significant number of local scale green linkages will play a significant part in the ultimate open space network.

Stanley River, Blackrock Ck, Stoney Ck, North Pine River, Cedar Creek, Hays Inlet, and King Johns Creek are streams from natural corridors that link urban and rural areas (refer Figure 8); and there are a few vegetation corridors that link urban green areas with rural habitats (refer Figure 8) including vegetation associated with Elimbah Creek, Burpengary Creek, Cedar Creek and South Pine River.

A proportion of these streams and waterways are expected to be degraded, with some located in rural land holdings that are not expected to be developed within the current planning horizon.

Available local government biodiversity information has also been reviewed and it is understood that some further synthesis is expected to be available for Pine Rural Areas in the near future.

Caboolture Nature Conservation Overlay, Caboolture Planning Scheme

A comparison of the Caboolture Nature Conservation Overlay with VMA mapping reveals three areas of 'Biodiversity Significance' that provide linkages with other areas of remnant vegetation but are not protected under the VMA.¹²

These areas in particular have either (i) a decent width (approximately 200+m) and/or (ii) they are patchy but link larger habitat areas:

1. East of Mt Mee – lat -27.08821, lon 152.812341;
2. East of Delaney's Creek – lat -27.007363, lon 152.842800;
3. North of Rocksberg - lat -27.102739, lon 152.842800.

3.4.1.3 Summary of Ecological Findings

- Ecosystem function of remnant vegetation (and certain areas of regrowth) within non-urban areas is protected under existing state legislation.
- The potential for strong north-south connectivity through the western extent of the study area is contingent on one or more of three partially fragmented corridors being viable and subject to a combined review of the Caboolture Shire linkages and Pine Rural Area corridors once the latter is available.¹³
- Sustainable connections to urban and coastal areas in the east are typically via the major and minor waterways, with stream health and condition (both within large rural holdings and through urban areas) being a significant factor in the success of the open space network

3.4.2 Scenic Amenity and Landscape Character

3.4.2.1 Information Reviewed

The following planning instruments, associated designations, papers, internal reviews, and other documents and data sets have been reviewed in relation to scenic amenity and landscape character values within the Moreton Bay Regional Council Rural Areas:

- South East Queensland Regional Plan 2009 - 2031: Map 7: Scenic Amenity;
- South East Queensland Regional Plan 2005- 2026: Implementation Guideline No. 8: Identifying and protecting scenic amenity values;
- State Coastal Management Plan 2002 (in force at date of this report);

¹² There are also numerous other patches, forming less significant linkages, which can identified if further detail is required.

¹³ See recommendations in Section 5.

- Queensland Coastal Plan: State Planning Policy: Coastal Protection (Approved 2011 but not in effect at date of this report);
- Moreton Bay Regional Council Scenic Amenity background analysis (July 2011);
- Moreton Bay Regional Council Character Analysis Maps (undated, confidential draft);
- Scenic Amenity of Caboolture Shire (January 2003);
- Caboolture Shire Cultural Heritage Study (March 2002);
- Pine Rivers Shire Assessment of Rural Landscape Values (March 2002);
- Visual Diary Character Area Studies for Dayboro Valley and Village, Samford Valley and Village, Mt Nebo and Mt Glorious;
- Cultural Heritage Survey and Assessment: Pine Rivers Shire (November 2002);
- Coastal Landscapes of Queensland: Coastal Landscape Assessment Methodology (Chenoweth et al 1997);
- a View of the Coast (EDAW Australia 1996).

South East Queensland Regional Plan 2009-2031

- Within the appendices, **Figure 10** illustrates the extent of *Map 7: Scenic Amenity* for the entire Moreton Bay Regional Council LGA (specific rural implications discussed later). The mapping is based on the methodology contained within the South East Queensland Regional Plan 2005-2026 Implementation Guideline No. 8: Identifying and protecting scenic amenity values. The pink colour denotes areas of high scenic value.
- These areas of high value are typically dominated by prominent ridges, mountains and coastal foothills and might assist in the determination of major visual catchments for the purpose of refined scenic amenity and landscape character classification at the Local Government level. However, coastal scenic values appear to have been overlooked: The values have been determined by arbitrarily combining 'statistically valid' community scenic preference data with an algorithm for visual exposure, which has evidently resulted in scenic preference being skewed away from low lying coastal environments and towards the highly visible ridges.
- The Moreton Bay Regional Council Scenic Amenity Project (July 2011) also recognises this omission and observes that (p15) "...the overlay mapping appears to be lacking in some areas on the coast and within the open space or nature conservation areas within the urban footprint."
- The Queensland Coastal Plan (below) exposes this issue further.
- Queensland Coastal Plan: State Planning Policy: Coastal Protection , January 2012 **Figure 11** illustrates (in red) the extent of areas of high scenic preference under the Queensland Coastal Plan, which are defined therein as "areas within 500m of the coastline or 500m of the bank of a waterway or estuary and are characterised by natural environments with little or no built elements". This indicative diagram only illustrates the broad potential for mapping and does not map the defined extent of tidal influence or areas characterised by natural environments.

- Some significant conflicts exist between the SEQ Regional Plan Guideline No. 8 and the Queensland Coastal Plan, not least of which are the definitions for scenic amenity and scenic preference, and the conflicting and onerous methodologies for compliance (Which obviously result in a different mapping outcome on the coast for what is supposedly the same measure throughout the region). Another fundamental difference is that Guideline No. 8 appears to presuppose a Scenic Preference that is set as a baseline (Map 7) and that erosion of those values is limited to a specific extent for the life of the Regional Plan and/or Planning Scheme, whereas the Queensland Coastal Plan does not yet provide a usable base map and instead relies upon determining the scenic preference score (and permitting a specified downward slip in scenic preference value) for each subsequent proposal within a defined area. Thus the Queensland Coastal Plan, although initially appearing to provide greater protection to coastal scenic values than Guideline No. 8, has the potential to allow a far more rapid erosion of values in the coastal zone than its Regional Plan counterpart.
- For the purpose of either Guideline 8 or Queensland Coastal Plan to be furthered by an LGA Planning Scheme, the mapping needs to be accurate and consistent and the codes need to be practical and transparent (and clearly derived from the higher level planning tools, i.e. the DEOs).
- On a positive note, the fact that both documents exist and openly conflict with each other lends support to the postulation that coastal and terrestrial landscapes are subject to different pressures and the scenic amenity classification system and/or assessment methodologies might need to be better balanced and more outcome driven.

Scenic Amenity of Caboolture Shire (January 2003)

- The above project became a pilot study for SEQ Regional Plan: Guideline 8 and Map 7 (Refer Figure 12).
- Figures 13 & 14, although utilised in the above study for the purpose of translating scenic preference and determining visual exposure, appear to contain the type of information reasonably necessary to commence a whole of region assessment of landscape character, visual amenity & scenic amenity areas and values (Land Cover Layer, Visual Catchments & Broad Land Use Zones).

Moreton Bay Regional Council Scenic Amenity Background analysis

- Figure 15 identifies the main localities for Pine Rivers. Of great interest to landscape character and scenic amenity will be the relationship between high value scenic landscapes within and straddling:
 - Mountain Summit and forests locality;
 - Rural Living Locality; and
 - Semi-urban locality.

Moreton Bay Regional Council Character Analysis Maps

- Figures 16 to 21 provide a good sieve mapping process for identification of landscape elements or characteristics (predominantly vegetation and topography) at LGA scale (with some of the base data needing further qualification).
- However, the documents do not appear to be based on visual catchments or character areas as likely to be experienced by the observer and the works appear to comprise a broad synthesis of landscape features which could be expected to inform future character area classification.
- The documents also appear to remain silent on the contribution of Coastal Scenic Amenity Values to character and expectation in accordance with SPP QCP.
- The broad “Rural/Range” classification on Figure 20 identifies a large part of the region as comprising a similar broad character, which may or may not be the case, but further analysis reveals more complex landscape interactions occurring within this area classification (see below).
- Figures 22 and 23 combine the extent of rural areas (LRAM) with the areas of high scenic value (SEQ Regional Plan Guideline 8) and potential high scenic value (Queensland Coastal Plan) to illustrate a possible characterisation of high scenic value landscapes, being those prominent and important natural landscapes that are likely to define the edges (ridges) and cores (valleys) of major visual catchments and landscape character areas.
- Figure 24 illustrates the broad relationship between land use designation, land cover and high scenic values. Particularly:
 - (1) The high scenic values along the Conondale Range occur within elevated areas of open space and rural use.
 - (2) The high scenic values associated with the line of hills extending NW to SE from Delaneys Creek to Dayboro occur in elevated areas of predominantly rural use. The rural residential extents of Ocean View (circled) appear to be highly visually constrained.
 - (3) Conflicts of mapped high scenic values, extractive industry, infrastructure corridors and rural and urban residential.
 - (4) Mixed land use and high scenic values suggests complex landscape management issues present or likely to be revealed in Mount Samson / Clear Mountain area.
 - (5) Coastal and near coastal areas affected by multiple conflicting state policy and regional plan overlays and codes.
 - (6) The current Pine Rivers Plan Scenic amenity provisions are not in accordance with Guideline 8 within the SEQRP.

- (7) The Caboolture Shire scenic amenity provisions appear to be in accordance with Guideline 8 within the SEQRP.
- (8) In particular, the broad cadastral based mapping of 'scenic areas', combined with the more detailed scenic amenity and scenic preference mapping, potentially provides a high level of protection to known and potential high value scenic resources. However, if adapted to the entire region, the code itself may need to be reworded to ensure all important scenic features that are mapped (not just ridgelines or waterways) are adequately protected from development.
- (9) Guidance is lacking on the process of assessment for areas with scenic amenity values of less than 5 or developments that exceed the 'Maximum Extent of Evident Use'. Both of these issues will need to be addressed in any future codes.
- (10) **For scenic amenity outcomes in coastal areas**, the provisions, definitions and expected outcomes of SEQRP Guideline 8 openly conflict or have potential to openly conflict with those of SPP 3/11:
- SEQRP Guideline 8 typically anticipates that baseline Scenic Amenity Values and Scenic Preference Values are established in the form of a mapping output. Where that mapping forms an overlay within the planning scheme, it might have the effect of setting the default scenic amenity value and scenic preference of an area for the life of the planning scheme. Where the scenic amenity values are inaccurately mapped due to scale or subsequently shaped by events outside the control of the scheme (such as development of a nearby UDA or major infrastructure), this approach would require an applicant to either accept the mapping, or undertake their own detailed studies to demonstrate a different amenity or preference rating.
 - The Queensland Coastal Plan State Planning Policy (SPP 3/11) endorses a different process for determining the pre-development Scenic Preference Rating (SPR) for an area, whereby the pre-development SPR is assessed for each subsequent development (meaning that Coastal scenic values could be eroded at a faster rate under SPP 3/11 than they could under SEQRP).
 - This highlights a potential conflict between SEQRP Guideline 8 and SPP 3/11, particularly where the overlay mapping adopted under SEQRP conflicts with the determined Pre-development SPR under SPP3/11 or worse, where the alternative mapping process under SEQRP (and the resulting acceptable outcomes in terms of the 'Maximum Extent of Evident Use'), differs from the SPP 3/11 result.

Note: The base definitions of 'Scenic Amenity' and 'Scenic Preference' differ between SEQRP and SPP3/11.

3.4.2.2 Summary of Scenic Amenity Issues

- The current Scenic Amenity mapping and policies for the region, as imposed by the various State instruments, is inconsistent and intrinsically flawed and needs to be updated. An LGA character study/classification should frame the further scenic amenity and visual amenity outcomes.
- For the purposes of either Guideline 8 or Queensland Coastal Plan to be furthered by an LGA Planning Scheme, the mapping needs to be accurate and consistent and the accompanying codes need to be practical and transparent (and clearly derived from the higher level planning tools, i.e.: the DEOs). The current Scenic Amenity Overlay Code itself does not provide a comprehensive trigger of assessment under the mapping.

Open Space Values

This assessment confirms that the protection and enhancement of significant ecological values throughout the region, along with a consistent approach to landscape character and scenic amenity, will ensure a diverse and well-integrated open space network is maintained throughout the Council area.

At a broader management level, the results of the Moreton Bay Regional Council Bushfire Management Strategy will be important for Council to review in the context of this Rural Areas Strategy, not just in considering planning impacts on towns and villages adjacent open space areas of high bushfire risk, but also in understanding bushfire impacts on biodiversity and how bushfire risk can be affected by changes the planning framework, tenure or the structure of the open space network.

In terms of utilising areas of open space for offsets, the reliability of the mechanisms for the creation of offsets is perhaps a matter for further review during policy development, but for offsets policy to drive delivery of strategic open space, the policy needs to be useable and transparent. At this stage, the current State Offsets policies, and the associated guidelines and methodologies for offset and ecological equivalence, are complex and challenging and the likely delivery of open space as a result of offsets is not easily quantified.

However, in terms of Council adopting its own offset policy, although the latest state offset policies and guidelines for ecological equivalence are challenging, it will be difficult for a local government authority to depart from the State Government model unless another local authority model is suitable, preferred and scientifically valid for the entire Council area.

3.5 Economic and Employment Assessment

3.5.1 Introduction

The purpose of an analysis and assessment of the current economic and employment situation in each of the communities of interest was to:

- clearly identify the role and function of the region's rural centres;
- identify and describe the current and anticipated employment structure of the various place types within the study areas; and

- identify opportunities to future develop rural enterprises particularly where they add value to existing and future primary production.

The following sections detail key findings and observations regarding the above.

Key information and data sets reviewed included:

- SEQ Regional Plan;
- SEQ Rural Futures Strategy;
- Council's Corporate Plan & Community Plan;
- discussions with Council's Economic Development Area;
- Council's Future Land Demand Study (AEC 2012);
- OESR Data – compiled from 2006 ABS Population and Household Census Data & Journey to Work data;
- interviews with Councillors;
- primary research regarding land use in Centres; and
- interviews with shop owners/managers in each of the Rural Centres.

Appendix E is the Centres and Economics Report prepared by CChange to support the economic and centres workstream of this study. The report includes a complete bibliography of documents reviewed. The following is a summary of the content of the report.

3.5.2 Centres Review

Successful centres are more than just places where people buy products and services; when they are well functioning, communities can identify strongly with them. Those most successful centres are identifiable locations for social, cultural and economic interaction and exchange, displaying a strong identity, sense of place and being the focus of community life and association. Essentially, centres perform optimally if they offer a multitude of functions. More specifically to the Moreton Bay region, well functioning rural centres:

- have an appropriate mix of retail goods and services, with all centres placing a high value on customer service/experience;
- have service sector tenancies that cater for the local market;
- are considered the cultural and community heart of the community to which they primarily serve;
- have key focal point/s for community meetings and events;
- include many appropriate community and government services;
- are attractive, safe and inviting and have recreation, leisure and (to varying degrees), entertainment opportunities;
- are generally legible and safe and have a focus on placemaking (although some could have improvements in this regard; and
- have a tourism element.

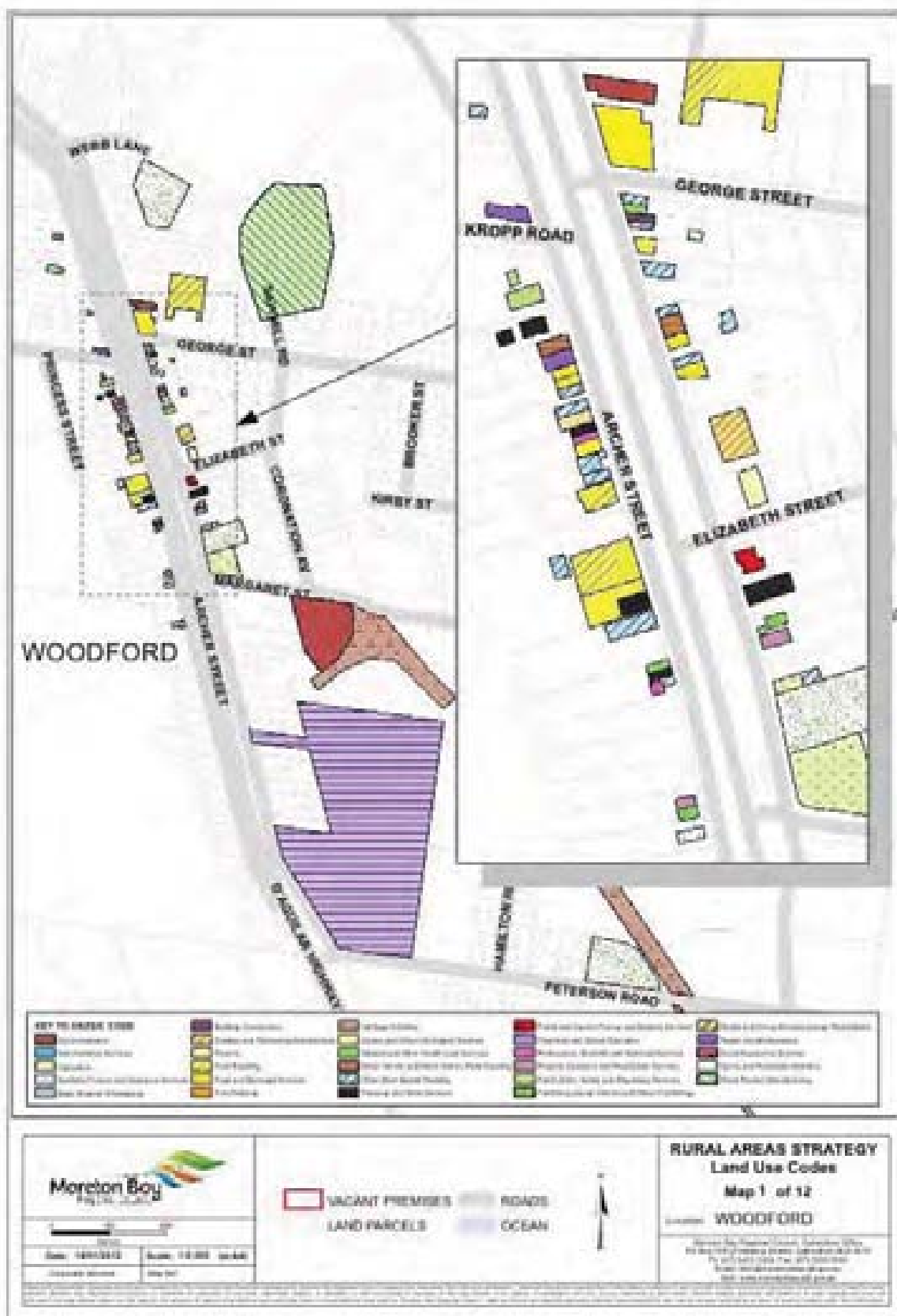
Based on the research and analysis conducted as part of this strategy, it is clear that Moreton Bay's rural centres – Woodford, Dayboro and Samford – are a highlight of the region. Each of the main rural centres are currently fulfilling roles that are conducive to their main catchment areas and can be described as successful rural towns/centres.

They each have a unique identity and a very strong sense of community, complying with the elements of well-functioning rural centres detailed above in varying capacities. In addition, the tourism elements of each of the centres could be improved and the housing mix could be diversified to cater for aging or young adult households.

The figures below show the detailed land use for the main centres. A summary of how each centre ‘scored’ in relation to the above dot points and improvements that would benefit the centres are listed in the tables below. The improvements noted could be influenced through local area plans for the centres and there may be some land use implications from arising actions.



Figure 3: Woodford Land Use



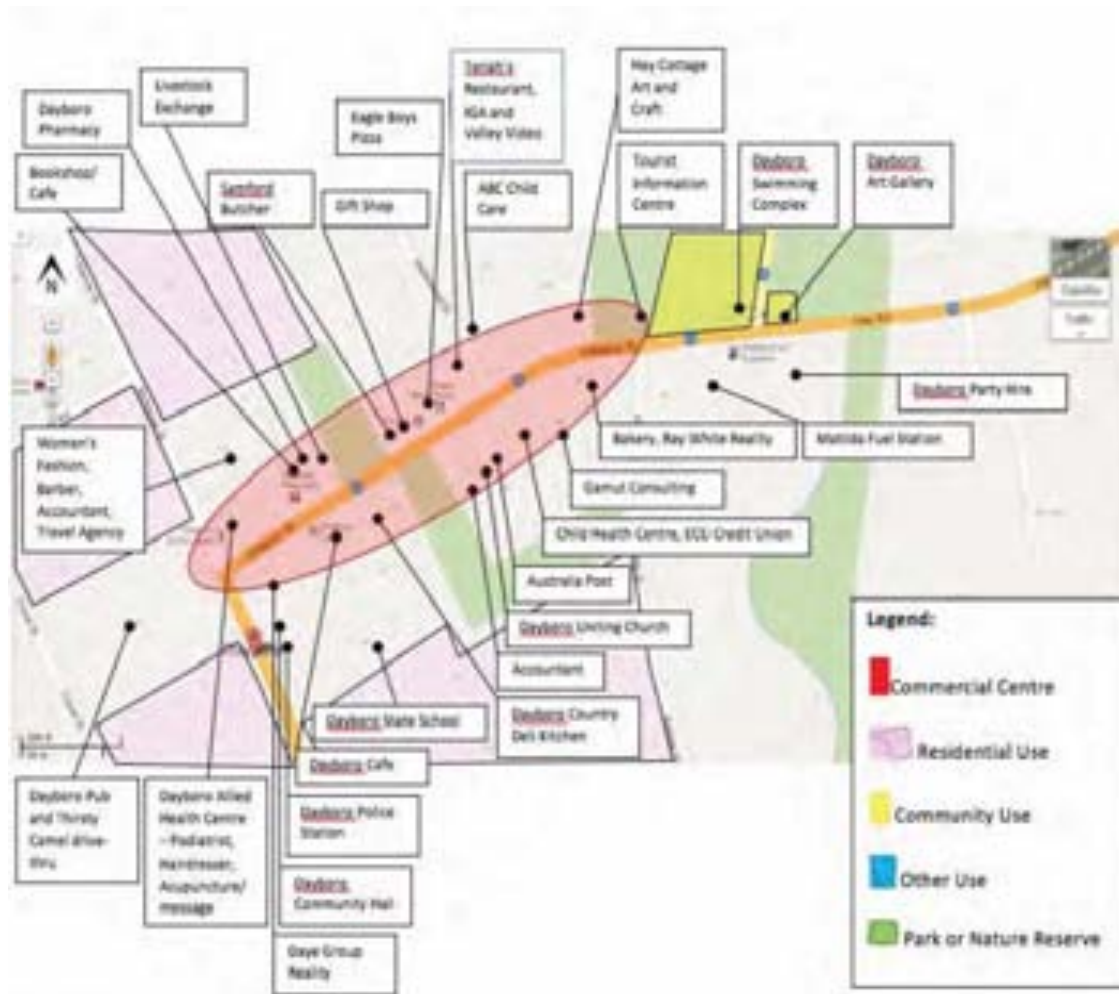
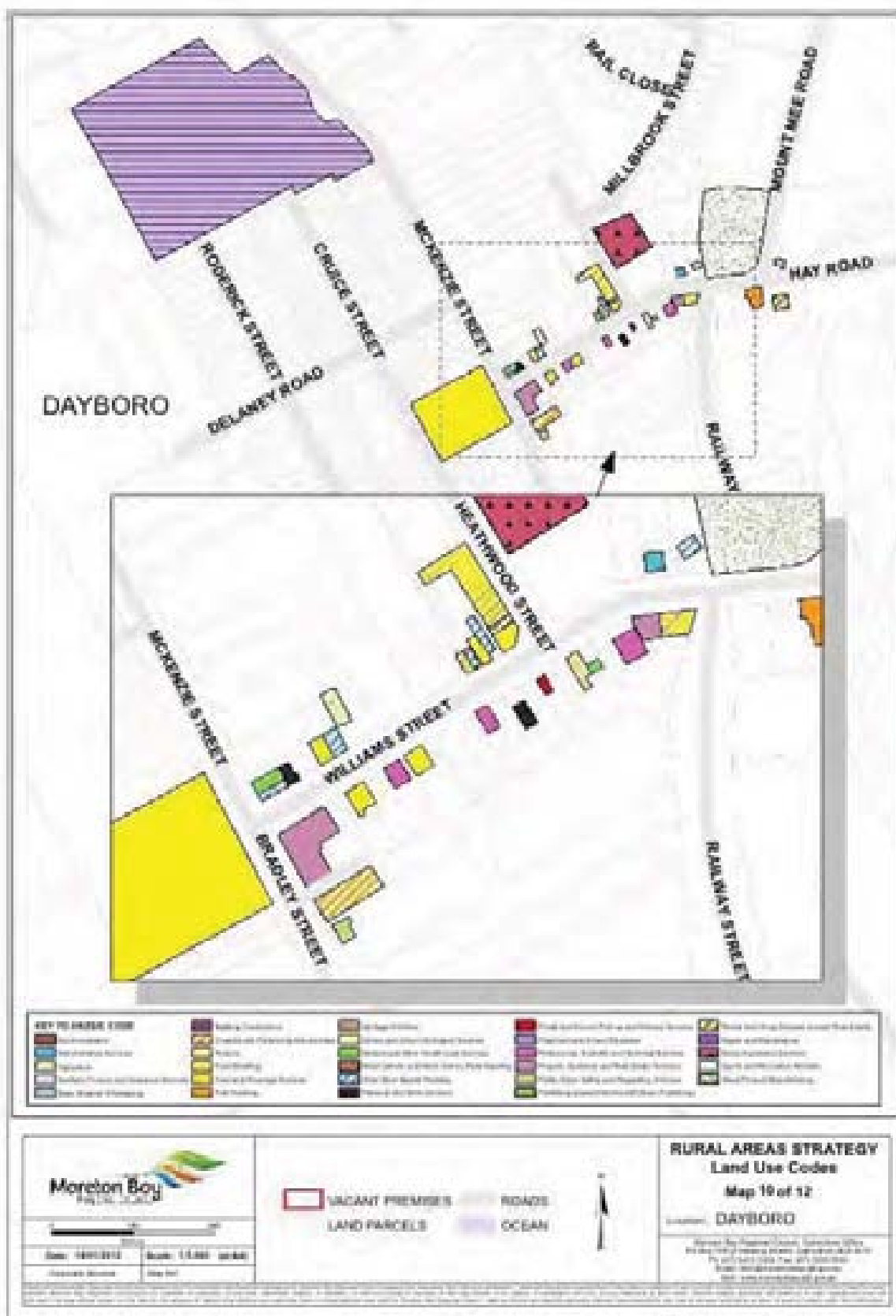


Figure 5: Dayboro Land Use





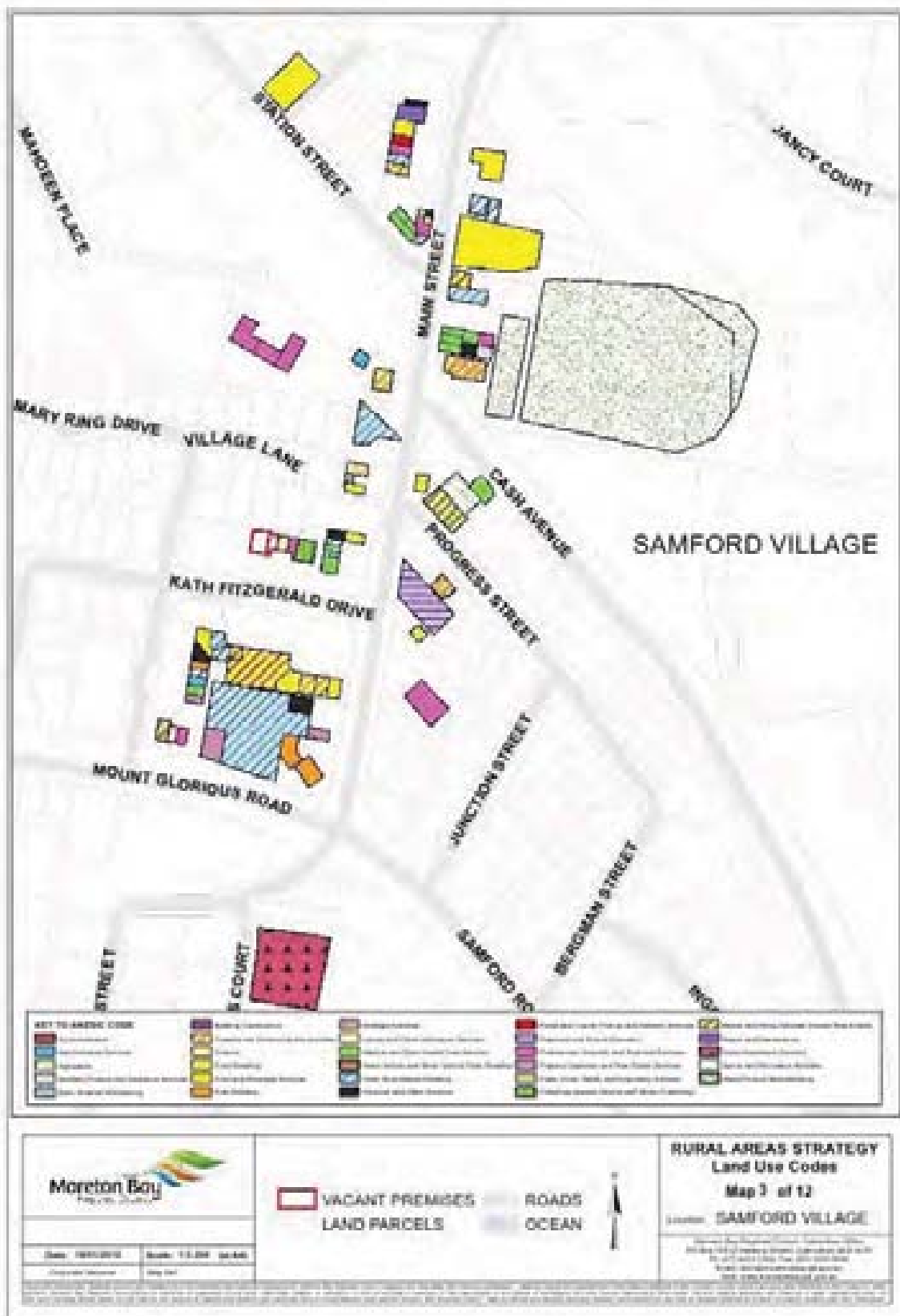


Figure 8: Samford Land Use

The report also includes, at Appendix 1, a summary of the characteristics of minor centres.

Summary of Moreton Bay Rural Areas Centres

Criteria	Woodford	Dayboro	Samford
An appropriate mix of retail goods and services, with a high value on customer service/experience	✓✓✓	✓✓	✓✓✓
Service sector tenancies that can cater for the local market	✓x	✓x	✓✓
Be considered the cultural and community heart of the community	✓✓✓	✓✓✓	✓✓✓
Key focal point/s for community meetings and events	✓	✓✓✓	✓✓✓
Appropriate community and government services	✓✓	✓x	✓✓
Attractive, safe and inviting recreation, leisure and entertainment opportunities	✓✓x	✓✓	✓✓✓
Legible and safe street and tenancy layouts that have a focus on placemaking	✓x	✓x	✓✓
A tourism element	✓x	✓x	✓✓
History incorporated	✓✓	✓✓	✓✓
Caters for a variety of households	x	x	x

3.5.3 Summary of Centres

All main rural centres in the Moreton Bay Region are functioning well. They are currently fulfilling roles that are conducive to their main catchment areas and can be described as successful rural towns/centres.

Broad floorspace analyses conducted indicated that there is ample floorspace at Samford and Woodford now and into the future. Even by 2031 it is unlikely that more floorspace will be required at these Centres. As such, it is recommended that these centres' roles and floorspace remain as they were in 2012. Dayboro could support an increase in floorspace. Based on analyses conducted here it is likely that this would be most successful if further tourism or specialised tenancies were explored, rather than an increase in supermarket tenancies.

All the main centres investigated here would benefit from a direct marketing/tourism strategy, local area investigations into safety / legibility, and potential requirements for space / areas for community groups. Opportunities to enhance the centres include:

Summary of Opportunities to Enhance Moreton Bay Rural Areas' Centres

Improvements that would benefit the Centres		
Woodford	Dayboro	Samford
▪ The development of well defined meeting areas / public spaces could be provided. Currently many community groups use the cafes for meetings. Further exploration regarding requirements would be useful ▪ Pedestrian and parking safety is an issue. ▪ Recreation, leisure and entertainment needs improvement ▪ Some services are provided, but potentially room for expansion here ▪ Placemaking a focus, but could be further improved ▪ Amenity improvements to soften the façade of the Woolworths would be beneficial ▪ With regards to Tourism, the centre is considered a 'stop off' when passing through to festivals or other events, rather than a tourist attraction in itself. Improvements required in tourism and marketing. ▪ Some residential, but not a diverse mix.	▪ A range of retail goods and services are provided in the centre. Further diversity would benefit the centre. ▪ Some services are provided, but potentially room for expansion here ▪ Some community and government services provided. Further investigation would be required to determine whether adequate for population ▪ Road legibility an issue ▪ Could improve tourism elements – has some attractions, but needs further ones. Needs marketing. ▪ Some residential, but not a diverse mix.	▪ Good level of community spaces and services provided, but few government services. Adequacy of government services would require in-depth investigation. ▪ Legible layout but pedestrian crossings could be provided to assist centre functioning. ▪ Anecdotal information suggests good day tripper patronage. However, ▪ more marketing could assist. Investigation of the introduction of local markets would be worthwhile ▪ Some residential, but not a diverse mix.

3.5.4 Socio-Demographic and Socio-Economic Attributes

The socio-demographic and socio-economic attributes of the communities of interest provide further insights into the character and substance of Moreton Bay Regional Council's rural areas. The information below was sourced from the most recent ABS Population and Household Census, which is the year 2006. Although this information is five years old, the 2006 Census data was the most comprehensive information available at the time of writing¹⁴. Consultation with Council, employers and employees in the Moreton Bay region verified that the 2011/12 characteristics of the rural areas of the Moreton Bay region are expected to be similar to the findings below.

¹⁴ The 2011 census is not due to be released until mid-2012 at the earliest.

3.5.4.1 Samford and Dayboro

For the 2006 period, ABS data revealed that residents in Samford and Dayboro (to a lesser extent) exhibited a higher socio-economic status when compared to Queensland residents on average. Key indicators of higher socio-economic status in these areas include:

- larger proportions of professionals and managers;
- higher median incomes;
- larger proportions of households earning over \$2,500 each week and higher housing loan repayments;
- larger proportions of persons in the labour force;
- larger proportions of households that have 3 or more vehicles; and
- a larger proportion of people finishing Year 12 or higher.

Journey to work data also indicates that 51% of people who live in Samford and its surrounds actually work in Brisbane. However, the number of people working from home in Samford is almost double that of those working from home across the entire state.

This information is indicative of a high number of 'tree changers' living in both Samford and Dayboro. 'Tree changers' is a term that refers to residents from metropolitan cities moving to regional parts of Australia for a new life and different living and working opportunities. These are often more established urban couples or families that have moved to peri-urban or rural environments.

3.5.4.2 Woodford and Coastal Areas

In comparison to the Samford and Dayboro areas, the Woodford and Coastal areas in Moreton Bay generally have a lower socio-economic status when compared to the Queensland average. Key indicators of lower socio-economic status in these areas include:

- a lower median income;
- larger proportions earning up to \$1,400 per week and having lower housing loan repayments;
- lower proportions of people in the labour force; and
- smaller proportions of people finishing Year 12 or higher.

The predominant driver behind the lower socio-economic status of those living in Woodford is the high level of employment in rural industries. The exception to this is the high proportion of managers, people working from home and those owning their own home that have been identified in these communities of interest. Conversely, in the Coastal Areas, the primary influence on the socio-economic status of the population is the high number of retirees in the area. A large percentage of this population however own their own home and those that are involved in the workforce are employed in a diverse range of fields.

3.5.5 Prominent Industry Sectors and Major Employers

Each of the relevant communities of interest varies in employment sector structure and the primary industries of employment for their residents. That is, those living in Woodford and surrounds were found to work largely in agriculture and public administration and safety.

In comparison, residents working in Dayboro and surrounding communities were employed primarily in electricity, water and waste services and construction. Alternatively, the Samford area displayed a higher percentage of residents employed in professional, scientific and technical services, information media and telecommunications and financial and insurance services.

In contrast again, the Coastal Areas of the Moreton Bay region were found to have employment spread across a variety of industries with no major concentration in any in particular. Please see Figures 9 and 12 below for a more detailed exploration of industries of employment in each of the communities of interest.

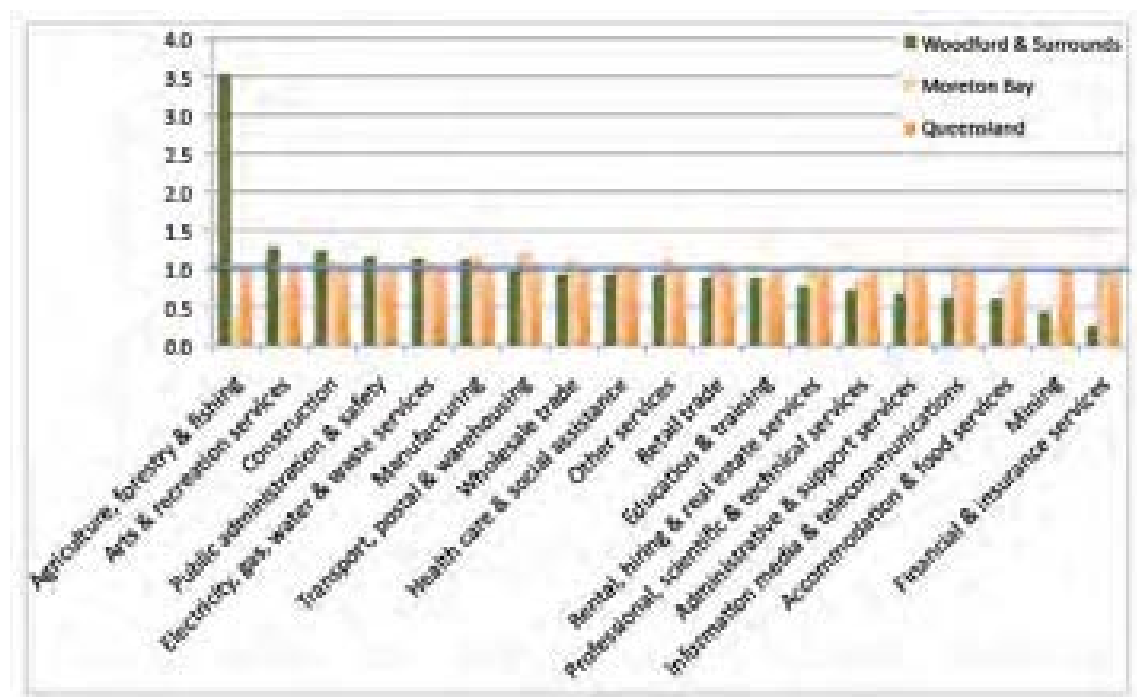


Figure 9: Location Quotient: Industries by Employed Residents in Woodford, 2006

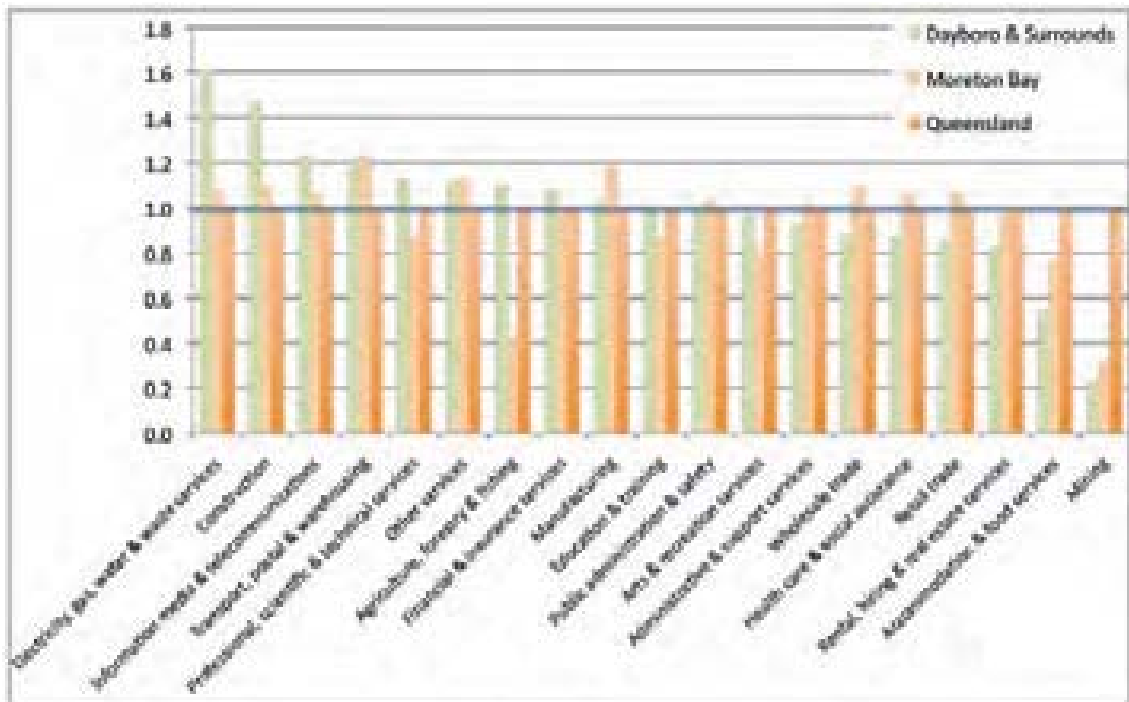


Figure 10: Location Quotient: Industries by Employed Residents in Dayboro, 2006

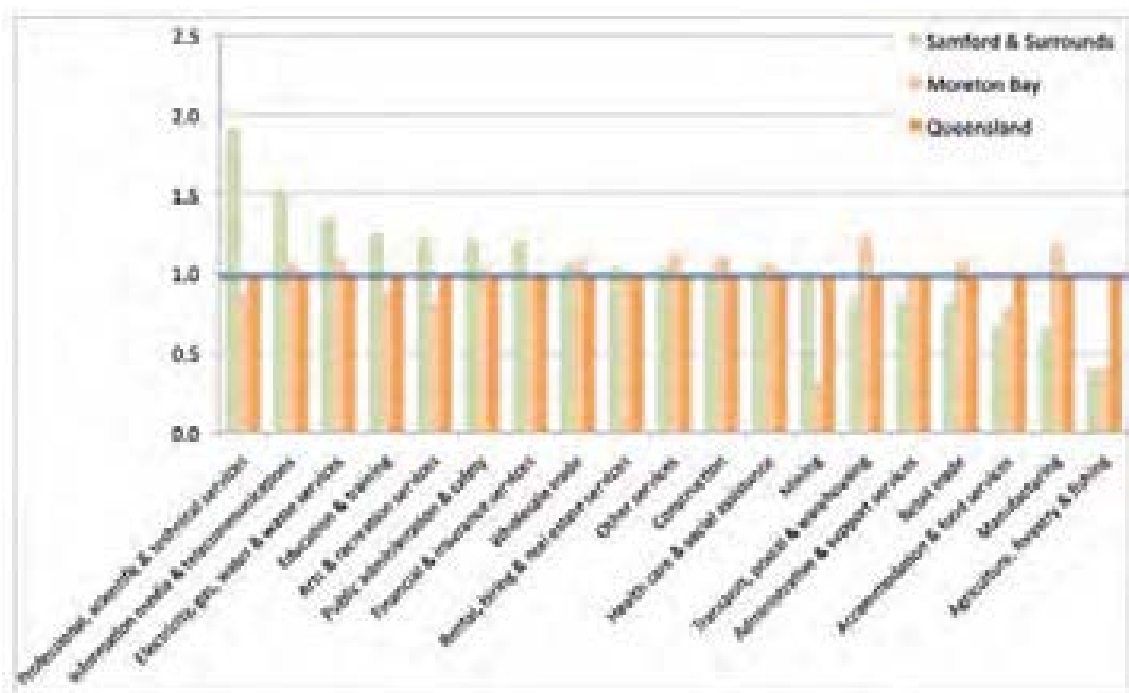


Figure 11: Location Quotient: Industries by Employed Residents in Samford, 2006

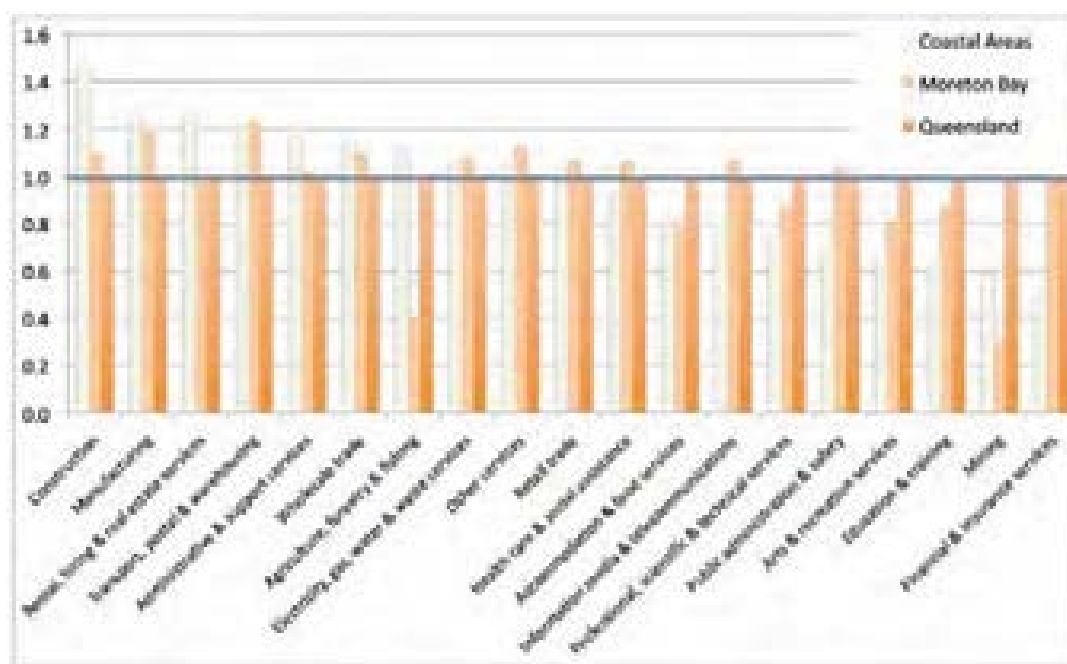


Figure 12: Location Quotient: Industries by Employed Residents in Coastal Areas, 2006

3.5.6 Current and Future Employment Structure and Recommendations

Moreton Bay Regional Council has a self-containment target of 70%. An analysis of ABS data from 2006 indicated that the communities of interest (for the purposes of this report) have self containment rates ranging between 35% (Samford) and 55% (Woodford, Dayboro and Coastal Areas).

The predominant rural sector that underpins the economy of the Moreton Bay region's rural areas, in particular Woodford, is in decline and this may have a significant impact on the ability to achieve high rates of self containment, with former rural industry workers seeking employment outside their relative community of interest and potentially, outside the Moreton Bay region. Furthermore, continual decline in this industry could see major changes to employment rates and industries of employment over the coming years.

The above analysis of the workforce in each of the communities of interest also revealed that a high proportion of workers in a variety of industries were over the age of 55. As this data is now five years old, it is appropriate to conclude that a significant number of these residents are either already retired or close to retiring. Should the rural areas of Moreton Bay not be able to attract new workers to these communities of interest, significant employment and economic impacts will be observed.

It is therefore recommended that:

- Council complete a social and community needs assessment for the Rural Areas;
- a comparison of 2011 Census data from the ABS (upon its release) with 2006 data to determine the relevance of these findings; and
- Council place a high value on completing a comprehensive economic development strategy for the rural areas of the Moreton Bay region.¹⁵

¹⁵ See recommendations in Section 4.

3.5.7 Exploring Economic Development Opportunities

Research and analysis was conducted for this report to determine the potential economic development opportunities for Moreton Bay's Rural Areas. All economic development opportunities explored kept Council's EDS vision in mind; *"foster[ing] a vibrant, sustainable and knowledge-driven economy that creates valuable employment for residents, protects the region's high quality of life and provides a prosperous future for all residents."*

The framework utilised to determine potential opportunities for the rural areas included ensuring that:

- industry recommendations supported the principle of promoting profitable and sustainable rural industries;
- recommendations can assist in Moreton Bay diversifying its economic development base in a way that helps Moreton Bay to become a thriving region of opportunity and more self contained;
- the skills and attributes of the workforce required to optimize the economic development opportunities in Moreton Bay are either present or are considered developable;
- the infrastructure required to ensure that opportunities can be maximized is planned or provided; and
- all recommendations made enhance and protect the vibrant lifestyle and unique identity of the Moreton Bay Regional Council.

The investigations completed clearly show that Council needs to devote resources to developing economic development opportunities for Moreton Bay's rural areas if they wish to assist employment in the region. This is particularly the case given the expected decline in current rural industries.

3.6 Infrastructure and Water Cycle Implications

3.6.1 Overview

The main areas identified for investigation are:

- the Eastern Community of Interest - Toorbul, Donnybrook and Beachmere;
- Samford;
- Dayboro;
- Wamuran;
- D'Aguilar;
- Woodford; and
- Ocean View.

In regard to these areas the following observations are made about the type and level of infrastructure servicing these areas:

- all these areas are serviced by a road network of reasonable capacity. Significant growth in these areas may require road upgrades but it is anticipated that this could be done. Nevertheless, it is to be noted that the D'Aguilar Highway connection from Caboolture through to Woodford traverses some hilly country and road upgrades in this area may be expensive;

- most of D'Aguilar and Woodford are sewerred and Wamuran and Dayboro are sewerred. All the towns have a town water supply. There is a high concentration of domestic sewage treatment plants (STPs) in Samford and in the Pine River Catchment generally. Ocean View and the Eastern areas are not sewerred. Growth in these areas would require upgrades to water and sewerage infrastructure capacity;
- Woodford and D'Aguilar drain to the Stanley River and on into Somerset/Wivenhoe Dam that is a significant part of the SEQ water supply. Wamuran drains to Lagoon Ck or Wararba Ck. Samford Drains to the South Pine River. Dayboro and Ocean View drain to the North Pine River and on into Lake Samsonvale that is a significant part of the SEQ water supply. Most of the receiving waters are degraded and growth would need to be managed to prevent further degradation;

Woodford, in particular, is subject to significant flood risk from the Stanley River.

The major constraints are considered to be related to water cycle issues and these are discussed in more depth below at Section 3.6.2.

3.6.2 Water Cycle

Environmental Flows

Environmental flow is defined as 'the minimum flow volume in a waterway, plus occasional pulse flows, required to maintain stream health of aquatic ecosystems'. Environmental flow objectives have been set in the Water Resource Plan (Moreton) 2007 including:

- Pine River at the end of the river
- South Pine River at the North Pine confluence
- Stanley River at Woodford Weir inflow.

These objectives are a set of minimum flow rates under various flow scenarios, attempting where possible to mimic natural flow rates. These objectives could impact on available water supply and harvestable yield and are especially cogent in the context of increasing population and climate change but also in the context of existing agricultural users. Environmental flows must be considered in future land use planning.

Sewerage Treatment Plants and Water Supply

The location of sewage treatment plants (STPs) in the Council area are shown at **Figure 13** below. The only STPs in the areas of interest to this investigation are at Woodford, Dayboro and Brendale. It is noted that:

- all STPs in MBRC have limits that significantly constrain discharge to receiving waters;
- the limits are driven by stream and ecosystem health through licence limits;
- the use of domestic scale STPs is a considerable issue in some rural areas, especially in the South Pine catchment. These tend to be relatively old and/or poorly maintained and so usually have relatively high nutrient effluent discharges.

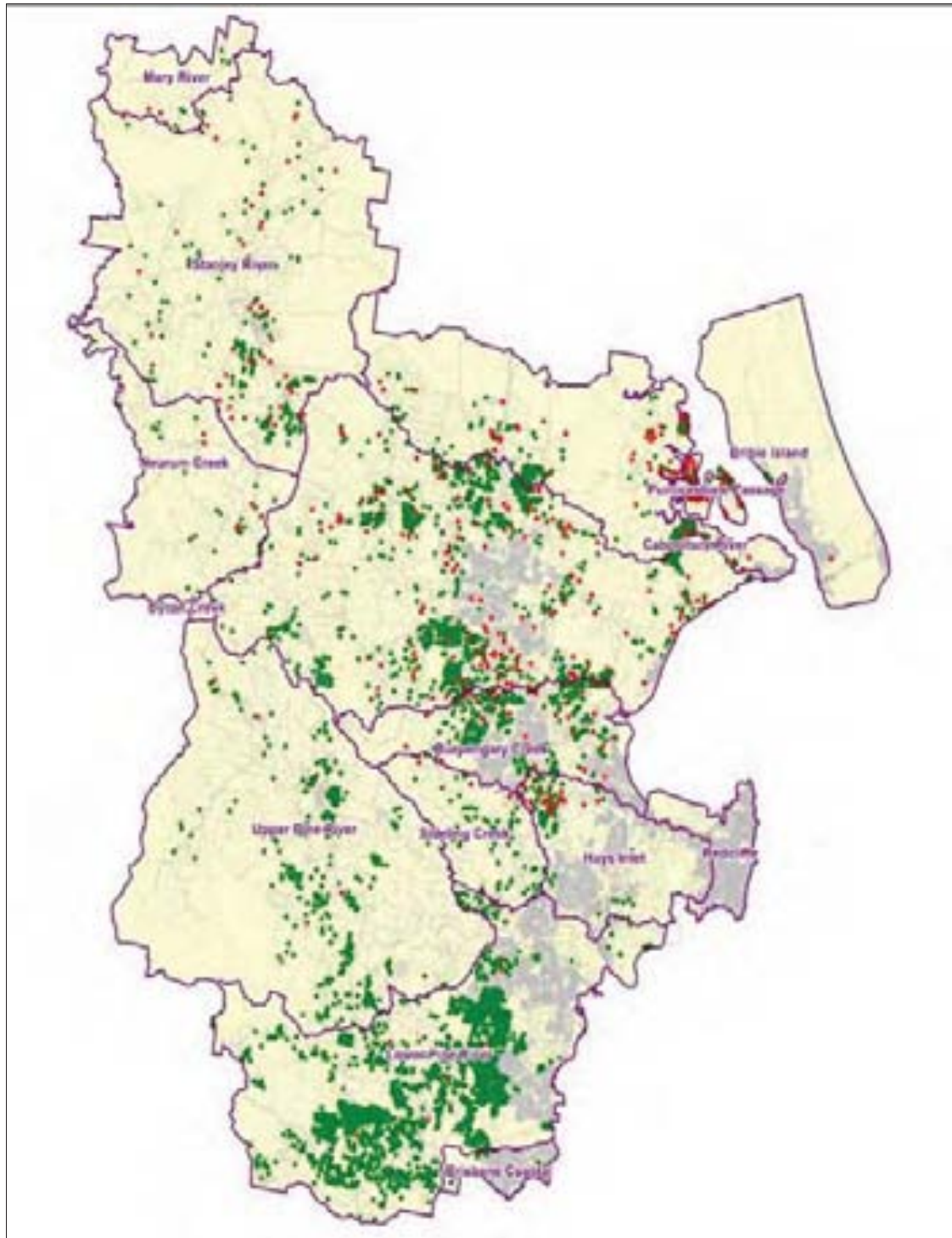


Figure 13: MBRC Distribution of Domestic STPs

The Samford area (where it is sewered) has reticulation to the Brendale Treatment Plant. This plant is very constrained.

Figure 14a below for the load limits at Brendale Treatment Plant indicates that capacity will be exceeded either by 2016 or 2021 depending on the possibility of diversion of some flows to BCC.

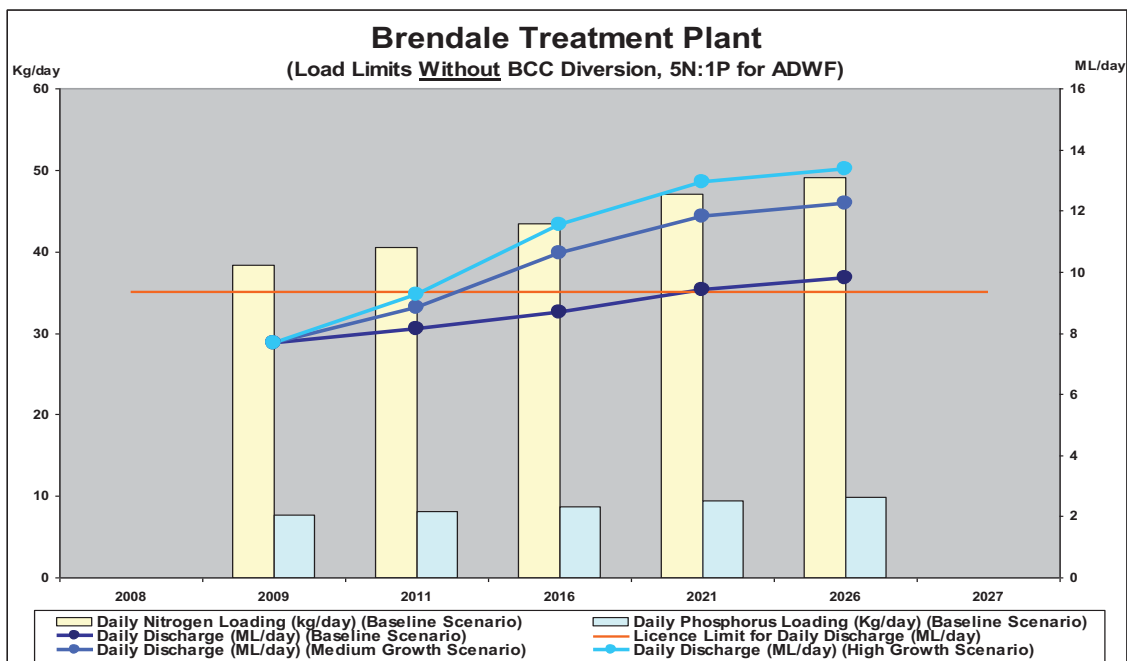


Figure 14a: Brendale Treatment Plant Load Limits without BCC Diversion

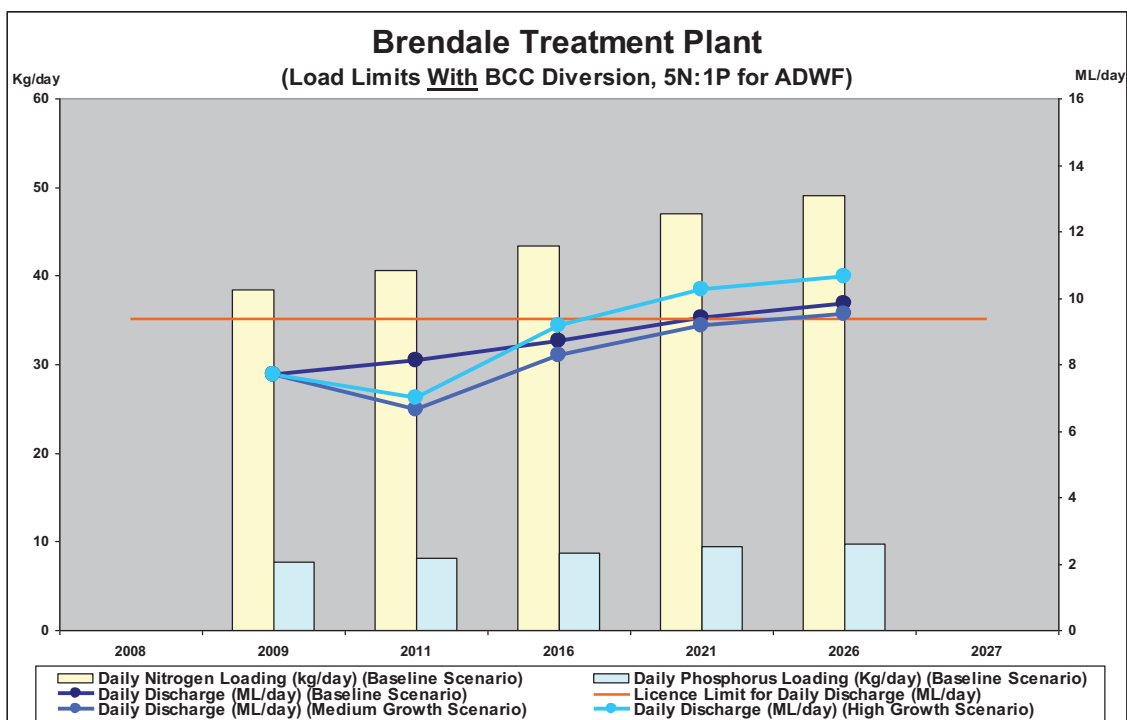


Figure 14b: Brendale Treatment Plant Load Limits with BCC Diversion

The township of Samford has constraints on its water supply and sewer connections. Water is supplied to the township via a single pipeline from Clear Mountain (with water sourced from North Pine Dam). This pipeline has a capacity constraint and the township of Samford is oversubscribed, however extensive demand management associated with the millennium drought has helped balance supply in recent years.

Sewage is conveyed to the Brendale sewage treatment plant. The single 6" pipeline from Samford is at capacity and additional sewage loads would likely require a duplication of this pipeline at significant capital cost. The Brendale STP is also at capacity but is currently being upgraded by Unitywater.

Further population growth in the Samford township would require detailed analysis of the capacity of the existing water and sewage networks, however further growth would likely incur significant infrastructure costs if existing pipelines needed to be upgraded. Adopting alternative water and wastewater strategies, such as local stormwater harvesting, wastewater recycling and reuse, may be able to support population growth in the face of these infrastructure constraints.

The surrounding peri-urban area is mostly supplied by bores and rainwater tanks (supplemented by local water tanker businesses) and septic tanks.

At Woodford, there is current work to upgrade the Woodford STP to a capacity of 2,600 equivalent persons, planned for completion in 2012. Unitywater considers this sufficient through to 2021, but this does not match the projected growth figures from OESR. The plant will produce Class A recycled water. There is a need to confirm a match between the projected growth and actual plant capacity. D'Aguilar sewerage is drained to the Woodford STP.

Water supply to Woodford is from a weir at the Stanley River, and this appears to have some capacity for growth at Woodford, though consideration has been given to a pipeline from Caboolture to meet future growth requirements.

Wamuran has sewerage connected to Caboolture South STP. This is extremely constrained by allowable discharges to the Caboolture River. However, growth with related sewer impacts from Wamuran are very small compared with the impacts likely from the Caboolture West Master Planned Area, and it is recommended that the issues be dealt with in parallel. Similarly, water supply to Wamuran should be considered in the broader context of the Caboolture West Master Planned Area.

The Dayboro STP has a design capacity of 2,000 EP, but the License is for 1,500 EP only and the current load is approaching the licensed capacity. Growth at Dayboro would require an increase in the licensed capacity of the STP.

Water supply to Dayboro is from a bore field at Dayboro and the aquifer is at capacity now. Increases in water supply will need to be managed, and there are a few ways this could be done, such as: construction of new water supply pipes from Petrie, demand management, or source substitution, e.g. stormwater harvesting or recycled water use.

Stream Health

In the table below, the overall 'grading' of waterways in the areas of interest are presented.

EHMP Score

Catchment/Waterway	2008	2009	2010	2011
Caboolture Estuary	F	D	D	C
Pine Estuary	C	D+	C	C
Moreton Bay (central)	C	D	D	D+

In **Figure 15**, the health and protection priority of streams in the areas of interest is presented. It is noted, for example, that downstream of the Woodford STP the stream health is lower than upstream.

It is not illustrated here, but Healthy Waterways reporting demonstrates that water quality in Pumicestone Passage has poor flushing and must be protected. It can be seen that the Stanley River 'grade' may be considered acceptable but other major waterways in and around MBRC are in poor health.

In consideration of the issues of environmental flows, STP discharge limits and stream health it is concluded that any proposed growth or development in the areas of interest would need to demonstrate that the impact to receiving waters is very low.



Flood

Flood Plans for the Q100 flood event are included at **Figure 16-20** below. Woodford, in particular, is subject to significant flooding.



Figure 16: Dayboro Flood Mapping

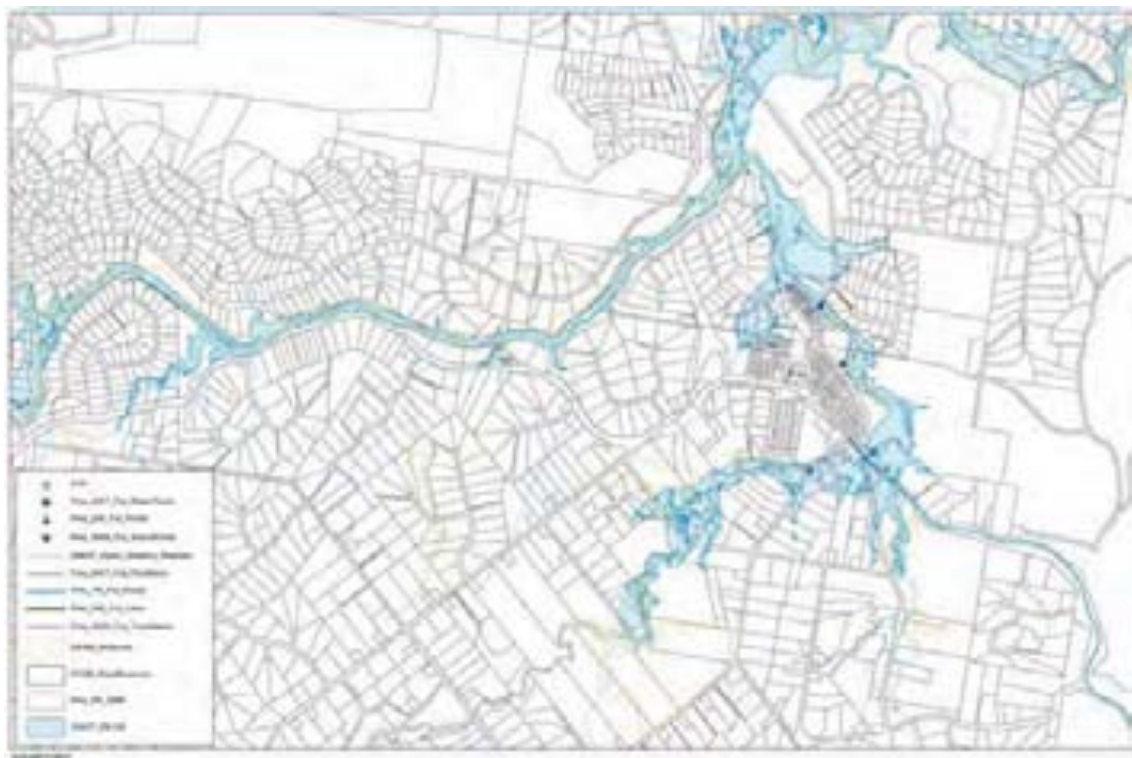
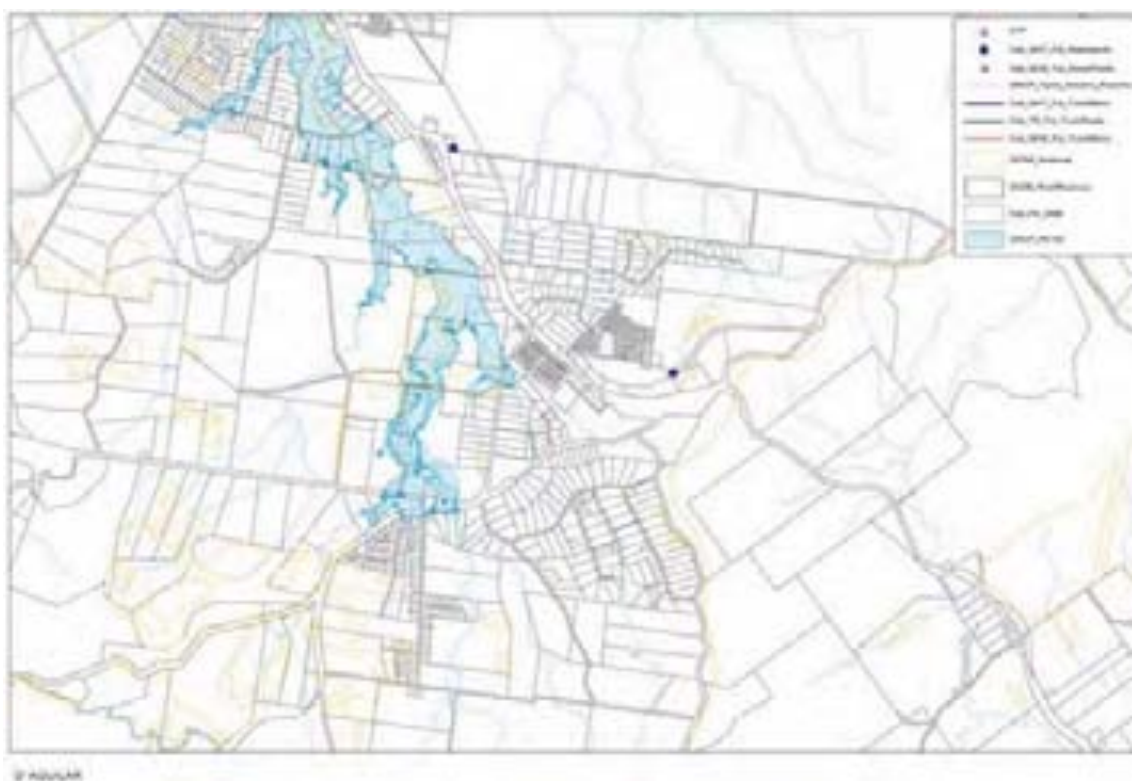
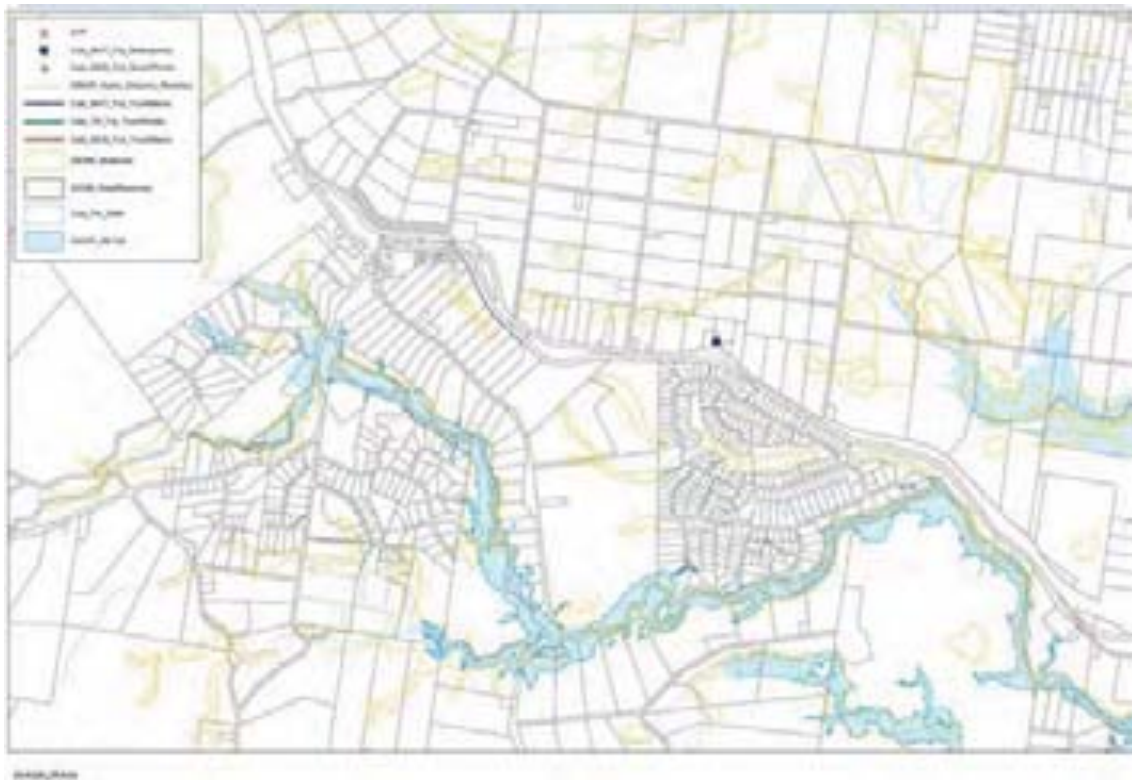


Figure 17: Samford Flood Mapping



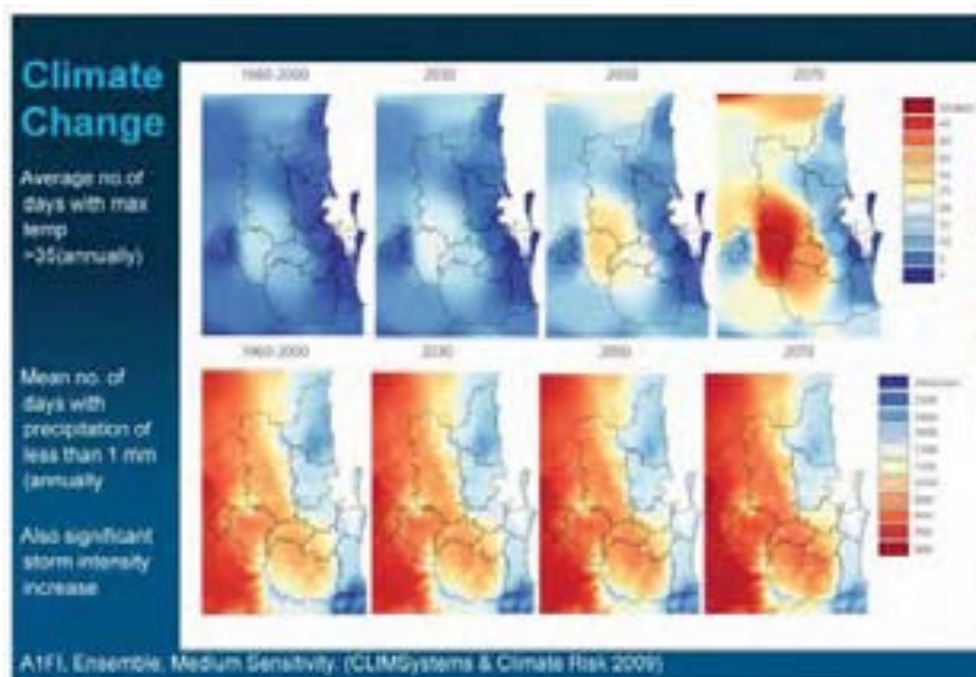


Climate Change

Climate change reports and investigations undertaken by MBRC indicate:

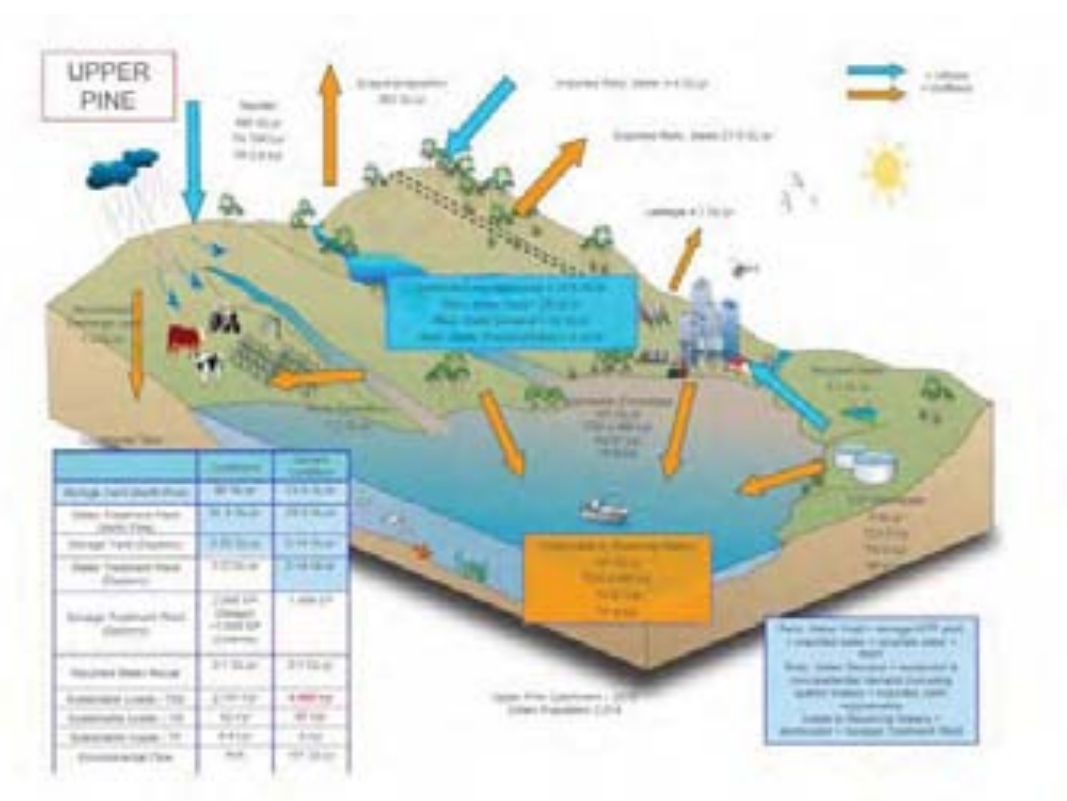
- a general decrease in annual precipitation, in the order of 10%;
- a general increase in storm intensity, in the order of 30%;
- sea level rise up to about 0.9m by the year 2100.

These factors combined with the issues discussed elsewhere in Section 3, mean that the Eastern communities of interest are so severely constrained that development or growth of these areas is unlikely.



Water Accounts

Water accounts for all of the major catchments of MBRC have been presented in the Total Water Cycle Management Plan prepared by MBRC. Copies of these, where relevant to this investigation, are included at **Figure 22-24**.



3.6.3 Acts, Regulations and Policies

A large number of acts, regulation and policy impact on and drive outcomes for the delivery of infrastructure in the study area. The following is a list, not intended to be comprehensive, of the key public legislation that applies and will continue to apply for the foreseeable future:

- Environmental Protection Act 1994;
- Water Act 2000;
- Water Supply (Safety and Reliability) Act 2008;
- Public Health Regulation 2008;
- SPP 4/10 Healthy Waters;
- SEQ Regional Plan 2009 – 2031;
- SEQ Water Strategy;
- SEQ Healthy Waterways Strategy;
- SEQ Natural Resource Management Plan 2009;
- Transport Infrastructure Act 1994;
- MBRC Town Plan and Policies.

3.7 Summary of Outcomes / Emerging Issues

The background and context review and assessment phases of the study identified a large range of issues for consideration in determining the strategy. These are summarised below.

3.7.1 General Issues

Emerging issues are divided into two main categories:

- towns and villages; and
- rural and conservations areas – demands and constraints.

The study area has a high level of rural land fragmentation, resulting from less restrictive previous planning scheme approaches in the former local government areas.

Traditional rural industries, including dairying and pineapple, growing are declining. The transition in the rural economy away from traditional industries has risks. These will need to be managed.

The established SEQ Regional Plan restricts further subdivision and defines urban development boundaries, restricting further urban development to towns and villages – notwithstanding there may be some potential for further subdivision within some rural living areas. This is combined with continuing pressure for use of existing fragmented rural lots for lifestyle purposes, and impacts from dwellings on isolated lots. Management of isolated development will be a growing challenge.

Rural and landscape areas have a diverse range of characteristics. In the north – predominantly traditionally rural, in the central area – in transition from rural but containing a range of values, and in the south – rural living is predominantly urban in character, and coastal living and values.

Four communities of interest are identifiable within the towns and villages for the purposes of examining housing and economic issues:

- Woodford and Surrounds;
- Dayboro and Surrounds;
- Samford and Surrounds; and
- Coastal Towns and Surrounds.

The coastal towns and surrounds are subject to natural processes including storm-tide and climate change considerations which are not evident in the remaining communities of interest.

The towns in the study area will become increasingly important for service provision given the projected ageing of the population nationally.

3.7.2 Economic Issues

The Role of Towns and Villages

The decline of traditional rural industries will threaten self-containment of employment and place more emphasis of growing employment within the towns of Woodford, Dayboro and Samford. For these centres to perform optimally, they will need to perform a multitude of functions.

Improvements that would benefit these centres include improvements to tourist facilities, parking and pedestrian safety, and a more diverse mix of retail goods.

Economic Development

While there may be some scope for value-adding industries based on food production, given the sub-region's projected population growth and location comparative to Brisbane and SEQ, infrastructure, industrial land availability and access to a skilled workforce:

- the region has a declining comparative advantage when compared to other parts of Queensland, such as Bowen and the Lockyer and Fassifern Valleys, due to their more sophisticated supply chain characteristics; and growth potential is further constrained by the local soil characteristics limiting crops to pineapples, and by the high level of fragmentation and encroachment by urban uses;
- while the mining sector's influence is apparently extending throughout Queensland, including Moreton Bay, through demand for services and as residential locations for 'fly-in fly-out', it is not likely that Moreton Bay has a comparative advantage in this regard. Conversely, it may be that the study area will suffer a drain of tradesman to other areas of Queensland where they have more direct access to work opportunities;
- opportunities for the region to benefit from green industries such as solar power generation are likely to be limited by the encroachment of urban uses and other microclimate factors.

However, an initial review of other possible economic opportunities suggests there is some scope for targeted economic development based on the following.

- Tourist uses: Tourism in centres and throughout rural areas are a part of the answer but is dependent on good links to employment centres. It can be considered to include:
 - Tourist accommodation: where it can be targeted and branded in a consistent way. For example, an approach to promoting the marine/coastal interface to attract the RV (caravan) sector and the day tripper / inland water sports sector has some potential;
 - Home-based businesses: particularly given proximity of the study area to urban areas of SEQ, there is potential to capitalise on the demand for rural living by encouraging the establishment of home-based businesses. These businesses typically spend a large proportion of their income locally;
 - Footloose industries: could be attracted to the area, but need adequate internet and communications is essential. To support a 'Smart Communities' strategy, adequate communications are needed so connections can be virtual as opposed to physical.
- Bruce Highway alternative: Another opportunity to build on this could be to set up, in conjunction with other inland local governments, an 'inland' alternative to the Bruce Highway tourist experience. Small scale tourism businesses associated with the alternative route would support low skilled, local jobs and serve as stepping stones to other work opportunities for the rural youth.
- Festivals / events: The Woodfordia site is now well known and successful and likely to grow to some extent in future years depending on management of impacts and effective links to services in Woodford. An approach which links festivals to the tourist sectors identified above could have potential while not encroaching on remaining rural activities. Tamworth manages to do this successfully. (It should be noted that retail uses should not be encouraged at Woodfordia as these would detract from the vitality of the Woodford centre.)

Importantly, the planning scheme has limited capacity to progress a number of these suggestions. This will be discussed further in Section 4.0.

3.7.3 Housing Issues

Housing Diversity and Affordability

Planning scheme strategies will be required to facilitate greater housing diversity and affordability within the main rural townships, particularly given that:

- the homogeneity of existing housing stock in all of the main townships (particularly Woodford, Dayboro and Samford);
- the lack of affordable housing stock, most obviously at Samford and to a lesser extent Dayboro, and the reported inability to meet demand for affordable housing (refer to consultation outcomes in **Appendix C**);
- lower individual and household incomes evident in Woodford and the Coastal townships (refer to demographic and housing profile in **Appendix C**).

There is a need for retirement and aged care accommodation which is consistent across the main rural townships of Woodford, Dayboro and Samford. It is estimated that one facility is required in each township in the short term, with the flexibility to expand in the longer term to accommodate increasing demand;

A range of smaller dwelling options is needed to respond to the noticeable trend of older people seeking to move from rural or rural residential lots into rural townships. The high number of older people and couple only households, as well as the ageing of the population, adds weight to the suggestion that there will be continuing demand for smaller dwelling options.

Projected Dwelling Demand

Projections prepared under the 'target scenario' for future dwelling demand by dwelling type indicate the following mix of dwelling could be accommodated within each community of interest to 2031:

- Woodford and Surrounds:
 - Separate houses – 2,564 dwellings (91% of dwelling stock)
 - Semi-detached houses – 93 dwellings (3.3% of dwelling stock)
 - Flats, unit and apartments – 17 dwellings (0.6% of dwelling stock)
- Dayboro and Surrounds:
 - Separate houses – 2,787 dwellings (95% of dwelling stock)
 - Semi-detached houses – 85 dwellings (2.9% of dwelling stock)
 - Flats, unit and apartments – 17 dwellings (0.6% of dwelling stock)
- Samford and Surrounds:
 - Separate houses – 4,046 dwellings (94.8% of dwelling stock)
 - Semi-detached houses – 153 dwellings (3.6% of dwelling stock)
 - Flats, unit and apartments – 28 dwellings (0.6% of dwelling stock)
- Coastal Towns and Surrounds:
 - Given the range and severity of land and infrastructure constraints in the Coastal Towns and Surrounds community of interest, a more detailed assessment of land constraints is required to determine what level of population growth, if any, can be supported.

Adequacy of Residential Land Supply

- The preferred scenario for future residential development within the rural study area involves limiting growth within the RLRPA and RLA areas and accommodating projected future dwellings within the main townships of Woodford, Samford and Dayboro.
- The assessment of vacant residential land provided in **Section 3.3.6.3** indicates a shortfall of vacant land to accommodate projected growth within the townships of Dayboro and Samford. A more detailed assessment, possibly through a local planning exercise, is required to confirm the extent of this shortfall and how it can be addressed. Options may include:

- allowing for the re-development or re-subdivision of existing rural residential areas within the Urban Footprints of Dayboro and Samford; and / or

Character of Rural Areas

- A key challenge in seeking to achieve above dwelling mix and dwelling targets will be to maintaining community identity and 'village' / 'community' feel of rural townships.
- Strategies to address this are considered in section 4.6 below.

3.7.4 Open Space, Scenic Amenity and Ecology Issues

- Existing legislative frameworks protect some values in non-urban areas.
- There is potential to identify a north-south ecological corridor in the western part of the region, subject to confirming the location and viable of some partially fragmented corridors.
- The current Scenic Amenity mapping and policies for the region, as imposed by the various State instruments, is inconsistent and intrinsically flawed and needs to be updated. However, there are some clear opportunities to establish linkages using existing protected and unprotected vegetation.
- For the purpose of either Guideline 8 or the Queensland Coastal Plan, the mapping needs to be accurate and consistent and the accompanying codes need to be practical and transparent (and clearly derived from the higher level planning tools).
- The protection and enhancement of significant ecological values needs to be prioritized throughout the region, along with a consistent approach to landscape character and scenic amenity, which will ensure a diverse and well-integrated open space network is maintained throughout the study area. Major and minor waterways are a significant factor in the success of the open space network in the whole Moreton Bay region – the rural areas are connected to the urban areas through this network.
- The result of the MBRC Bushfire Management Strategy (by others) will be important for Council to review.
- In terms of utilising areas of open space for offsets, the policy needs to be useable and transparent. The current offset policy (Version 3.0) and associated guidelines are complex and onerous and the likelihood of delivery of open space as a result of offsets is not easily quantified.¹⁶

¹⁶ More discussion of a possible approach to offsets is provided in Section 4.

3.7.5 Infrastructure Issues

- The existing road network has reasonable remaining capacity, however, significant growth in the investigation areas may require road upgrades. This may be expensive and resource intensive in areas such as the D'Aguilar Highway connection from Caboolture to Woodford.
- Environmental flows must be considered in future land use planning - any proposed growth or development in the areas of interest would need to demonstrate that the impact to receiving waters is very low.
- All STPs in MBRC have limits that significantly constrain discharge to receiving waters.
- Woodford, in particular, is subject to significant flood risk from the Stanley River.
- The Coastal community of interest is severely constrained by infrastructure issues and potentially coastal process, making these areas unsuitable for significant development or growth.

3.7.6 Overall

The assessments show that two key issues, namely (i) the significant existing extent of fragmentation of rural land and (ii) the decline of traditional rural industries, are likely to combine to accelerate population growth on rural lots in locations across the study area, including in areas which are remote from services and /or contain ecological or scenic amenity values.

The importance of centres in (i) replacing employment and economic development opportunities traditionally provided by traditional industries, and (ii) providing a range of housing options, cannot be underestimated.

In addition, the role of rural areas in conserving landscape, open space, ecological and scenic amenity values for the whole of the Moreton Bay region, is a key aspect of a rural areas strategy.

The analysis of spatial, economic and infrastructure characteristics provides the basis of identification of a land-use strategy based on a 'place type' model, using the land use characteristics referred to in this section. There is a clear grouping of issues between (i) towns and villages and (ii) rural, coastal and landscape areas which could underpin this process.

Finally, it is important to note that, while the new planning scheme will be a significant policy tool in addressing the issues identified by this study, a range of non-planning scheme tools will also be required.

In particular, the potential for a large increase in additional dwellings in relatively remote locations will require management approaches in addition to those in the new planning scheme.

4.0 RURAL LANDS STRATEGY

4.1 Overview

This final section identifies a framework for addressing the issues raised in Section 3. It is intended to support the drafting of Council's planning scheme, in particular the Strategic Framework, and to address the requirements of the brief, but also identifies areas which will require management outside the scope of the planning scheme.

4.2 The Role of the Planning Scheme

The planning scheme has a significant role in managing future assessable development in rural areas. This will include:

- regulating subdivision, in unison with the SEQ Regional Plan, which will continue to prevent further subdivision in RLRP areas; and
- establishing a policy framework for new material changes of use setting high level strategy and local planning criteria for rural and rural residential areas and townships (including providing for more land for housing and greater housing diversity), and translate that strategy down to individual lots. This includes prescribing the objectives for ecological and scenic amenity values and the contribution of development to meeting those objectives.

Further, the analysis underpinning the new planning scheme, including the residential assessment in this study, can inform any future proposals to amend the Regional Plan. For example, given strong initial indications in this study that additional land within the urban footprint is needed in the townships, the planning scheme can demonstrate the extent of change required.

However, the planning scheme will have limited capacity to address a number of the issues identified in Section 3. This includes:

- redressing the decline of rural industries – the planning scheme can take a risk-tolerant approach to allowing for 'value-adding' uses and home businesses on rural properties (to the extent this does not detract from other planning objectives), but cannot influence structural and other issues affecting the agricultural economy;
- addressing infrastructure issues particularly water and sewer capacity issues;
- establishing major ecological corridors and links, particularly where these require acquisition of land (eg. for offsets);
- limiting the development of new dwellings on existing rural lots. In practical terms, the scheme cannot prevent or limit such development, except through the use of overlays and code criteria (eg. where ecological or other constraints are identified) and associated changes to levels of assessment. This is likely to have the effect of facilitating better site outcomes rather than discouraging the establishment of new houses altogether, and would need to be balanced with the additional assessment resourcing for Council and cost implications for applicants of doing so.

Similarly, while it is possible to articulate objectives in the planning scheme encouraging amalgamation of rural lots, it is not likely to be achieved to any great extent, without associated assistance from Council in other ways eg. financial incentives to applicants to defray costs.

The strategy outlined in this section recognises that addressing a number of the issues identified in Section 3 is likely to require a range of tools and programs in addition to those proposed for the planning scheme.

4.3 The Role, Function and Character of Rural Areas and Townships

The rural areas of Moreton Bay are strategically important for both the whole Moreton Bay community and the South East Queensland region. As distinct from more broad-hectare rural areas elsewhere in Queensland, the character of the Moreton Bay rural areas reflects their proximity to the urban corridor centred on the northern Brisbane metropolitan area, the main northern railway line and the Redcliffe peninsula.

Respecting their origins and traditional roles, the rural areas and townships in Moreton Bay will continue to have, multiple local and regional roles and functions, including:

- providing employment and supporting the local and State economy;
- protecting landscape and scenic amenity values;
- supporting and protecting environmental values including biodiversity and vegetation;
- providing in thriving rural townships acting as hubs of community and economic activity, an alternative to urban lifestyles;
- protecting sensitive riparian areas and water quality;
- assisting with the management of waste water; and
- providing recreation opportunities at a local and regional level.

In the life of the first Moreton Bay planning scheme, while continuing to support traditional rural industries including grazing and horticulture, the rural areas and townships will also continue to have a central role in providing housing, economic development and rural lifestyle opportunities in proximity to services and employment based in urban centres, particularly within the Moreton Bay region.

4.4 Overarching Strategies

The planning scheme, in particular the Strategic Framework, will need to be drafted with reference to the following overarching strategies.

4.4.1 Residential Strategy

The planning scheme should direct a high proportion of residential growth to the three nominated townships of Woodford, Dayboro and Samford and existing rural residential areas in the vicinity of each centre, in that order of priority. However, this will required more detailed investigation of local constraints and opportunities, and the balancing of the character and amenity of the towns with potential growth strategies.

The areas within the Rural Living designation in the Regional Plan have limited remaining capacity and this will provide an opportunity to direct the bulk of future residential growth to areas zoned for urban residential uses within townships.

This will help address water quality and other ecological impacts in existing rural residential areas, and ensure that a higher proportion of residents have ready access to services and employment.

4.4.2 Employment and Economic Strategy

Moreton Bay's rural areas and townships make a major contribution to the economy of the region, and employment, and this role will continue in the future.

The decline in most traditional rural industries, which can be expected to continue, has implications for the economy and employment in the future. As a result, the rural townships are at the core of economic health of Moreton Bay's rural areas in the future.

In the future, it is recommended that Council ensures:

- the townships/centres are working optimally; and
- alternative economic development opportunities are available to the rural areas.

Recommendations for Council regarding economic development opportunities include investigating, in detail, opportunities associated with the following (land use implications of proceeding with industries noted below should be highlighted in investigations):

- clean energy initiatives and determining the ability to partner with the businesses in rural industries that are in decline;
- tourism initiatives, particularly focusing on the main rural centres of Woodford, Dayboro and Samford, establishing further bed and breakfasts, 'farm stays,' other rural experiences, potentially investigating the wine industry and growing the festivals and events market in the Region with a particular emphasis on lifestyle and rural events;
- the potential and likely success for the rural areas to host transport and logistics infrastructure (although, as noted, it is likely that this will not yield positive outcomes); and
- other opportunities associated with attracting fly in, fly out (FIFO) workers or the building manufacturing sector could also be investigated, but major gains to the rural areas are unlikely to result.

In addition to the above, it is recommended that Council consider:

- developing a tourism strategy for the rural areas and linking this to the broader Moreton Bay region. The strategy would need to determine key markets and key attractions such that the focus is kept within the identity and lifestyle attributes of Moreton Bay;
- undertaking a branding and marketing strategy for the area, with an emphasis on the main Centres as well as other tourism attributes; and
- develop the main centres to reach their potential.

4.4.3 Biodiversity and Open Space Strategy

4.4.3.1 General

The rural areas contain a range of ecological and scenic values which should be protected by the new planning scheme as far as possible. Values identified in this study should form part of planning scheme mapping and the identification of ecosystem corridors and other opportunities to rehabilitate ecological and scenic amenity values should be prioritised.

Commonwealth and State legislation already protects a significant proportion of these values and areas.

The main strategy considerations for this study are as follows.

1. A number of options for biodiversity corridors are emerging, particularly as north-south and east-west connections, which form part of a larger open space network. Every effort should be made to establish and maintain viable corridors to ensure connectivity and facilitate biodiversity and genetic exchange. The existing urban areas will also continue to play a role in contributing to the function of corridors. In this regard:
 - waterways in rural residential areas and townships should be clearly identified and their contribution to biodiversity at the local and regional level understood and prioritised. Larger holdings, particularly those containing degraded waterways in the upper catchments, may have some potential for a greater contribution to biodiversity and connectivity through offsets. Fine tuning of all points in the network is required. Eco-tourism uses are expected to be compatible with these values depending on policy and location;
 - Coastal areas and resources are subject to multiple constraints. An adaption strategy for sea level rise, including that which acknowledges the potential and likely impacts on the extent and nature of marine habitat and coastal freshwater wetlands, will be necessary in the future.
2. The existing rural production area and open space network to the north of Caboolture (Identified within the 2005 Caboolture Shire Plan as an Inter Urban Break between Sunshine Coast and Brisbane), while not significant in terms of known scenic or ecological values, does appear to contribute to an important north-south landscape character transition. The critical components of the inter urban break, particularly those natural and semi-natural character areas that are highly visible from the major transport routes (but reasonably including all areas considered to be important to the continued function of that break), should be identified and protected.
3. To provide for the identification and protection of important character and community identity in growing townships and rural residential areas, framing the rationale and criteria for sensitive future urban form will be necessary. Critical to this is the need to review the original visual diaries, and understand local perspectives on what features, functions or specific areas constitute or espouse important local character or identity.

4.4.3.2 Offsets Strategy

General Comments

The issue of ecological offsets is a challenging one in which to achieve the right balance. Other local authorities within south east Queensland, including Gold Coast City Council, are presently investigating various options.

Ecological features and functions considered most significant by Gold Coast City Council were high and medium value koala habitat, freshwater natural wetlands and in-stream habitat, and assessable vegetation. Of these, freshwater wetlands and in-stream habitat are predominantly fixed natural assets and the specific feature can not be physically removed, thus function can not be offset.¹⁷

In addition to the overall offsets policy, it is understood Gold Coast City Council is considering a separate 'Corporate' policy for Council municipal works programs. However, at this stage the policies are expected to be identical, with some differences in implementation and assessment.

Unless there is a specific justification for an alternate position, an offsets policy for Moreton Bay Regional Council, for consistency, should attempt to be as similar as possible to those of other South East Queensland Local Government Authorities, but no policy should be inconsistent with the current State policy at the time. The approach of demanding a prescriptive ratio for offsets may be too onerous for small and medium infill developments and 'ecological equivalence' is the best objective for an offset, to be clearly demonstrated by the applicant. In our experience, it has been increasingly difficult to identify external offsets in urban areas, but the approach has worked in some non-urban areas.

Process

To understand the possible extent of such a policy for the region, there needs to be some understanding of what are the likely locally significant ecological features and functions that are not currently addressed by State and Commonwealth offsets policies.

Firstly, there would be a need to identify whether there are any ecological overlays or other known data that adds value and/or extent to the existing federal and state levels of biodiversity and ecosystem protection.

For instance, any areas of Local Government 'Biodiversity Corridor', 'Significant Vegetation', or 'Koala Habitat Mapping', that directly overlays 'Endangered' or 'Of Concern' remnant vegetation, or 'koala bushland habitat' (under the relevant State Planning Regulatory Provision) within non-urban areas, might be able to be excluded from any further Local Government offset as they will already require an offset that achieves equivalence under the current state policies (the natural assumption applied is that 'equivalence' transcends the boundaries of Federal, State and local legislation and must do so in order to remain scientifically valid), so will not require a separate local policy to be formulated for that asset.

¹⁷ Koala habitat and assessable vegetation are dealt with under 'Process'.

However, it is likely that there will be important local assets that are not otherwise protected (or required to be offset) under State or federal legislation.

In this regard, an overlay of *Vegetation Management Act 1999* mapping with the *Caboolture Nature Conservation Overlay* has revealed three areas (east of Mount Mee, east of Delaneys Creek, and north of Rocksberg) that are mapped on the overlay as 'Biodiversity Significance', are vegetated, and might reasonably provide linkages with other areas of remnant vegetation, that may not otherwise be afforded protection under *Vegetation Management Act 1999* or via an open space designation.

These areas should also be reviewed in detail in the context of the pending biodiversity corridor information for the Pine Rivers area with a view to informing a local ecological asset profile as part of the background to the Local Government offset policy.

Ecosystem function within 'Of Least Concern' regional ecosystems also has significant levels of protection in non-urban areas, so might reasonably be excluded from any further local government offsets in rural areas. However, 'Least Concern' regional ecosystems within urban areas are expected to be under far greater pressure due to exemptions at the State level.

Some features or functions (such as the connectivity and conveyance components of streams) are not typically able to be offset elsewhere.

In terms of the above areas, features and functions, key questions are as follows:

- if any such areas exist, are they significant? To clarify, 'significant' might relate to the extent and nature of the ecological feature or function, such that if the asset covers a large area but is poorly situated to be of any significant ecological value, it may not be considered significant;
- do any of these assets comprise fixed constraints that can not reasonably be offset (i.e. waterways or significant wetlands)?
 - importantly, waterway function is dependent upon, among other things, conveyance and connectivity. Matters of aquatic habitat and geomorphic stream function can not be readily offset in other locations, so will not ordinarily form part of any local government offset policy. However, riparian vegetation can be physically affected without damaging the other functions;
 - where the function of riparian corridors is significantly affected, it will need to be managed (offset or otherwise addressed) in situ;
 - the nature of corridors suggests that, where any significant local function is affected by the removal of critical vegetation and/or habitat, there should be provision under the offset policy to offset in situ (minor realignment or augmentation of the corridor).

Locations for Offsets

To better understand the issue regarding appropriate locations for offsets, three key issues must be understood:

1. From any ecological review, there will be areas that emerge as the best candidates to receive offsets (in terms of enhancing inter and intra-catchment connectivity and furthering the purpose of the various DEOs and codes). The locations and priorities might vary, but they all usually share a common thread:
 - degraded waterways and wetlands linking natural assets;
 - degraded cross-catchment connections that improve biodiversity and facilitate genetic exchange; and
 - other fragmented terrestrial linkages which only remain as a result of undevelopable steep slopes and may have thus become part of an important fauna refuge or corridor.
2. There may be 'offsetable' assets identified as part of the 'Process' above (and via any detailed Council investigations which follow) that may require very specific landform, geology and local conditions to achieve equivalence.
3. There is a risk that some potential offset receive sites may not be suitable for the assets being offset and vice-versa.

To obtain a clearer picture of where offsets might be most needed, the key issues should perhaps be reframed as follows.

1. The matter of offsets is not one that is likely to diminish in significance within the current planning horizon.
2. The Queensland Government's current position on offsets is represented by the current Queensland Government Environmental Offsets Policy (and the various policies and guidelines created thereunder).
3. The demand for (thus the need to identify) offset sites will be driven by the opportunity and necessity to clear assessable vegetation and habitat under the various state policies (predominantly from urban areas).
4. The South East Queensland Koala Conservation State Planning Regulatory Provisions (Koala SPRP) already nominates broad areas and maps habitat types that are to be prioritised for offsets, but the VMA 1999 does not presently provide this.
5. It is possible that Local Governments may also identify local features that would require offset if removed, but this is not necessarily common to all local governments and circumstances.
6. The ability to identify external offsets within urban areas is becoming increasingly difficult.
7. Although it is reasonably anticipated that connectivity along waterways will be a major focus of offset sites, the ability to identify offset sites in non-urban areas, will be determined by a number of factors, not least of which being a combined review of the local biodiversity corridor information for Pine Rural Area (expected April 2012) and the Caboolture Shire linkages in the context of long term regional biodiversity nodes and corridors.

8. Specifically, the ability to identify suitable external offsets within rural residential areas is also problematic, primarily due to the fact that many allotments may have already been subdivided along degraded waterways and, as a result, multiple contiguous allotments would need to be purchased, and access assured, in order to make offsets on them viable. The opportunity for an array of targeted policy, and structure planning exercises, to make such an outcome more attractive to land holders might need to be reviewed in greater detail via policy review or structure planning process.
9. The opportunity for offsets on larger rural land holdings is another aspect to consider, particularly where those allotments contain degraded waterways and are not otherwise expected to be developed within the current planning horizon.
10. Access to external offset sites in order to plan, implement and maintain the offset is expected to be a persistent issue with all offsets, with the assurance of reasonable access to be the responsibility of the applicant.
11. Where appropriate (and where DERM or another agency has not otherwise committed to provide one), a sieve mapping process can be devised to determine the gamut of priority offset sites, in the context of significant corridors and linkages and possible feasibility layers to assist the applicant such as slope, bushfire/biodiversity risk, and accessibility.
12. Other inputs, such as priority streams for contributing to waterway health might form appropriate overlays.

The matter of priority offset locations throughout rural areas would become clearer following the above, and the development of a region-wide nature conservation strategy (and a consistent open space strategy) to formalise this approach is encouraged.

4.4.4 Infrastructure Strategy

The projected / proposed growth in the key townships will put considerable pressure on water cycle infrastructure and the environment in the ways described in Section 3. General strategies to manage these impacts are the following:

- seek to constrain development to the Urban Footprint, with such development to be connected to sewer reticulation;
- development outside the Urban Footprint, if it occurs, should be required to minimise the water demand and to treat sewage with a domestic STP including Advanced Nutrient Removal, with a minimum lot size of 4,000m². Agreements regarding the ongoing maintenance of domestic STPs should also be considered. Infrastructure should not be developed to service Rural Living Areas;
- all development should be required to adopt water demand and load management measures consistent with SPP 4/10 - Healthy Waters;
- the requirements set out in 'Place Types' should incorporate the above strategies.

Strategies specific to the key townships are:

- at Woodford, confirm that the capacity of the water supply is sufficient for predicted growth, taking account long term impacts from climate change and environmental flow constraints;
- at Dayboro, determine strategies for supplementary water supplies and STP license upgrades;
- at Samford, determine strategies for managing increased sewerage demand and impacts from existing on-site STPs.

Note in the above that land supply has not been considered as a constraint.

4.5 Use of Place Types in the New Planning Scheme

In this strategy, the rural areas, rural living areas, and townships of Moreton Bay are described through the use of place types. This approach is consistent with the '*Next Generation Planning*' framework¹⁸.

It is recommended that the place typology approach, as proposed in the draft Strategic Framework, be confirmed as the framework for identifying the highest level policy in the new planning scheme. The inclusion of graphic materials similar to those used in the Lockyer Valley Regional Council's strategic framework would assist with communication of this new approach. This strategy is designed to be directly transferable to the planning scheme drafting process.

The use of place types provides a form-based approach to strategic planning which identifies areas with common characteristics, similar land use mixes and development densities. Planning responses for identified planning issues, including intent statements, codes and performance criteria, are then determined for each place type.

The place type approach provides an accessible and easily understood framework for the planning scheme, particularly when supported by graphic materials.

Excluding the coastal areas, an overarching framework can be overlaid on the place types, as indicated in Section 3:

- North – a community based on rural pursuits and events at Woodfordia, centred on and supported by Woodford and its unique urban form and character;
- Central – a band of rural and rural residential areas, including various ecological values, centred on and supported by Dayboro; and
- South – a more closely subdivided area, accommodating a greater concentration and diversity of urban-style housing forms, along with rural living uses, in proximity to urban areas and employment, based on and supported by Samford village.

¹⁸ '*Next Generation Planning – Affordable Living, Smart Growth, Form-based codes, SEQ Place Model. A handbook for planners, designers and developers in South East Queensland.*' Australian Government, Queensland Government, Council of Mayors South East Queensland. 2011.

In general, for all place types, the following criteria are relevant:

- the rural areas will also continue to provide (i) considerable character and scenic amenity to the region's urban areas, as a green backdrop, and (ii) a framework for connectivity as the basis for the long-term protection of the region's biodiversity values and a balance between urban and non-urban uses;
- extractive resources on rural lands will continue to be protected for their value to the economy;
- coastal values will continue to be protected, and the impacts of natural hazards on human life and property will be minimized;
- the rural towns and villages will continue to support both the rural and urban areas of the region by:
 - supplying services and facilities to residents on rural properties;
 - contributing to employment self-containment and economic vitality;
 - providing a hub for community activity;
 - providing affordable and diverse housing choices, as an alternative to those in urban and rural areas; and
 - helping to define the unique character of the region.

Appendix F is a map, produced through the rural land analysis, identifying the proposed place types on which the strategy described in **Section 4** is based.

4.6 Planning Strategies by Place Type

4.6.1 Introduction

Appendix G identifies the role and function of each place type, in 'ready reckoner' format, in accordance with the criteria specified in the study brief.

The following summarises the main characteristics of each place type, starting with townships and rural residential areas, and provides proposed planning responses for each, in a manner which can be readily translated to the planning scheme.

4.6.2 Townships

Key Characteristics, Trends / Pressures and Opportunities

Coastal townships are generally unsewered and subject to constraints including coastal processes and generally unsuitable for further growth. However, the inland centres are a highlight and focus of the rural areas of Moreton Bay.

Woodford, Dayboro and Samford and their surrounding communities of interest are different from each other, yet all provide a community hub and access to services and employment for both township residents and surrounding rural areas.¹⁹ Together and separately, they provide economic development opportunities and have strong potential to contribute to the supply of affordable housing and housing diversity within the wider Moreton Bay region.

¹⁹ **Appendix E – Centres and Economics Report** (CChange, 2012) provides comment on the communities of interest and townships in particular, in more detail.

However, existing housing in the townships is strongly characterised by single dwellings and limited housing diversity and there is a need for retirement and aged care accommodation is consistent across the key rural townships. Further, housing supply is potentially constrained by availability of land. Broad estimates of land capacity undertaken in this study suggest an indicative shortfall of land in the Urban Footprint to 2031, under the preferred scenario of accommodating all future growth within the rural townships, for Dayboro and Samford. It is recognised, however, that in the absence of planning scheme controls it is likely that a potentially significant portion of this growth will be accommodated in the RLRPA. Furthermore, a local area planning exercise will be required for Dayboro and Samford to understand local planning constraints and the actual capacity to accommodate additional growth.

Local roads are generally sufficient to meet expected demand, given their connection to the broader regional road network. However, local parking and pedestrian environments have potential safety constraints.

Planning Response

Rural Townships Generally

- Local area planning of townships is recommended to ensure:
 - enough land is provided in each to accommodate anticipated and planned population growth, including in commercial and industrial uses and in an expanded range of housing types – also informing a review of the appropriateness of current Urban Footprint boundaries in Samford and Dayboro in due course;
 - detailed urban design and built form criteria are identified for each township respecting the particular history and character of each;
 - opportunities are investigated for the transitioning of existing rural residential areas to urban residential over time, however, specific locations within the urban footprint will need to be determined;
 - conflicts and other local issues in ‘hotspot’ areas can be addressed.
- While this study has gone some way towards identifying alternative scenarios for housing mix in the three key townships, additional more detailed analysis may be appropriate to confirm land supply, zoning and code criteria for residential uses in the townships.
- This can be done through a local area planning exercise for the townships of Woodford, Dayboro and Samford in order to determine:
 - locations within the townships where re-development / re-subdivision of existing areas may be appropriate;
 - locations where dwelling types other than separate houses would be most appropriate (eg. multiple dwellings, duplexes, shop top housing etc.); and
 - character precincts that need to be preserved under the new planning scheme.
- Further development to be limited within Rural Living Areas, particularly due to impacts on water quality from on site sewage treatment systems.

- Retain and enhance the unique character and identity of each place, to support livability, self containment and tourism.
- Ensure new development is of a scale and built form which contributes to and does not detract from that character and identity.
- Ensure they are more than just retail centres, but also a cultural and community heart, a meeting place.
- Provide a mix of goods and services.
- Maximise economic development opportunities.²⁰
- Provide for home based businesses where compatible with local amenity and character.
- Seek to maintain rural character while achieving a greater diversity of housing stock and increased housing supply by:
 - identifying and protecting precincts of character value (also consider use of residential character zone / precinct or overlay in these areas);
 - increasing residential density by allowing for hidden²¹, invisible²² and gentle²³ forms of density which can be peppered throughout rural township;
 - using other higher density residential forms (shop top housing, multi-unit dwellings) to be located within walking distance of the village core, close to services, transport and along major roads.
 - dwelling forms other than separate houses that are likely to integrate well existing housing stock may include duplexes, triplexes, multiple dwellings, shop top housing, secondary dwellings / grannie flats (rear lane cottages, loft apartments, row houses generally suited to a more urban context);
 - generally limiting all development to two storeys, except where local planning identifies areas where medium density housing is appropriate.
- New development to be provided with urban services, including sewer.
- In townships (excluding coastal villages) management of run-off and the quality of run-off is an important issue for local water supplies.
- The scope of the study has not included a full review of social and community infrastructure. To support the detailed local planning of the townships, and appropriate planning of social facilities and services to support existing and additional population, a detailed needs assessment is recommended.

²⁰ See Economic strategy at section 4.4.2

²¹ Hidden density - density that is not obvious when viewed from the street but can be seen from the rear (e.g. hatched lots, cottages accessed via rear lane).

²² Invisible density – does not alter the building form (e.g. secondary dwellings in an existing house).

²³ Gentle density – subtle density that is not immediately obvious (e.g. dwellings above ground floor retail on a commercial street, row houses, duplexes).

Woodford and D'Aguilar

- Retain and reconfirm Woodford as the centre of activity for the north western rural communities of the MBRC.
- Majority of growth within the north western rural area to be accommodated within the Woodford urban footprint, subject to further assessment of the capacity of existing vacant land.
- Facilitate greater housing diversity including an additional (by 2031):
 - 87 semi detached dwellings; and
 - 17 flats, units or apartments.
- Accommodate expansion of existing retirement village to accommodate low and high care beds within new planning scheme zones.

Dayboro

- Retain and reconfirm Dayboro as the centre of activity for the central / western rural communities of the MBRC.
- Majority of growth to be accommodated in the urban footprint, subject to further assessment of the capacity of existing vacant land and the possible need for additional land within the urban footprint. Further analysis required to confirm need for either (i) expansion of the urban footprint; and/or (ii) redevelopment and re-subdivision of existing residential areas and underutilised land.
- Facilitate greater housing diversity including an additional (by 2031):
 - 85 semi detached dwellings
 - 17 flats, units or apartments.
- Provide for greater housing choice, smaller lot sizes and dwelling forms critical to improving affordability.
- Identify potential sites for aged care facility within new planning scheme zones (an extension to existing retirement village or a new facility).

Samford Village

- Retain and reconfirm Samford as the centre of activity for the south western rural communities of the MBRC.

- Facilitate greater housing diversity including an additional (by 2031):
 - 132 semi detached dwellings;
 - 25 flats, units or apartments.
- Providing for greater housing choice, smaller lot sizes and dwelling forms critical to improving affordability.
- Identify potential sites for an aged care facility within new planning scheme zones (either an extension to existing retirement village or a new facility).

Coastal Villages (Donnybrook, Toorbul, Sandstone Point / Godwin Beach / Ningi, Beachmere)

- Revisions to OESR CCD level population projections will be necessary, following a more detailed assessment of land capacity, to accommodate future population growth.
- The level of population growth that can be supported is to be determined through more detailed investigation of:
 - coastal management issues (storm tide inundation and erosion prone areas, particularly Toorbul, Beachmere and Godwin Beach);
 - infrastructure capacity, particularly sewer;
 - other land constraints, such as acid sulphate soils;
 - buffer to extractive resources; and
 - nutrient run off the Pumicestone Passage;
- Provide for the continued protection of existing caravan park sites at Donnybrook and Toorbul and Sandstone Point as these are an important form of affordable accommodation.
- Assess and monitor need for community facilities and services in coastal townships – social services, community and other transport is likely to be important in these communities (especially if population growth is low) due to isolation from urban areas and low incomes apparent from demographic profiling.

Indicative Planning Criteria

- Consider introduction of planning controls to manage the uptake of vacant lots in the RLRPA.
- Limit future development until a more detailed assessment of land constraints in the key townships has been carried out.
- Limit new development and subdivision to urban footprint. Provide opportunities for mixed use development in town centres.
- Direct future rural residential development to within Rural Living areas on edges of towns – otherwise no further rural residential development within townships.

Other Considerations

The Coastal Plan SPP is a relevant consideration in the event that any expansion of the urban footprint is considered in Coastal townships. Until this assessment has been carried out, Council should consider limiting capacity for future residential growth in coastal areas and potentially other areas where affected by the SPP.

4.6.3 Rural Residential Areas

Key Characteristics, Trends / Pressures and Opportunities

Comprises land in the Rural Living Area (RLA) designation in SEQ Regional Plan, including the rural residential areas of Ocean View, D'Aguilar and Samford Valley. These areas comprise of a diverse range of lot sizes and varied accessibility to services. Most are centred around townships, however, Ocean View is isolated from the main rural townships.

In the future, as demand increases and supplies reduces, there is likely to pressure for re-subdivision of existing rural residential lots, especially those in the larger size range and in areas closer to services. This is only likely to occur with RLAs due to the constraints imposed by the SEQ Regional Plan.

D'Aguilar RLA

- There is an estimated 33ha of vacant land zoned for rural residential or rural purposes, which includes approximately 100 subdivided lots, some of which are in the development pipeline and yet to be built on.
- The majority of land is currently zoned for rural residential purposes, mostly within a buffer precinct with minimum lot size of 8,000m².

Ocean View RLA

- The area is highly constrained due to biodiversity values, bushfire and landslide hazard.
- The estimated number of existing vacant and subdivided lots that could support housing is 53. These remaining lots are likely to be vacant due to the relatively significant constraints (e.g. biodiversity values, bushfire or steep slopes), however, as the supply of rural residential land becomes more limited, these may become more attractive for development in future.

Samford Valley RLA

- The Samford Valley is extremely fragmented and there is only limited land available for further greenfield rural residential development within the RLA designation.
- There are up to 132 subdivided lots, some still in the development pipeline, yet to be built on.

Planning Response

Planning Intent General

Overall non-worsening of current level of fragmentation and associated impacts. In accordance with SEQ RP provisions, no further land to be zoned Rural Residential. Development in water supply catchments (North Pine and Stanley) has no impacts on water quality.

Direct population into centres/urban footprint to reduce pressure for further development in RLAs.

Criteria regarding minimum lot size and possibly minimum dimensions, particularly in areas subject to demands for re-subdivision. Tighter controls eg. Higher level of assessment in water supply catchment, controls on effluent management. Regulation of secondary dwellings.

D'Aguilar

- Direct population growth away from rural residential areas into the centres/urban footprints (Woodford and to a lesser extent D'Aguilar).
- Link development of remaining / vacant rural residential lots to criteria which limit development and its impacts If / where additional rural residential subdivision is to be permitted, limit new lot sizes to a minimum 4,000m² with domestic STP to include advanced nutrient removal.
- To make better use of existing rural residential land within the urban footprint, consider rationalising rural residential precincts in the existing Caboolture scheme and reducing the minimum lot size within transition and buffer precincts (currently 2ha and 8,000m²) to 4,000m².
- Any development in rural residential areas to the east of D'Aguilar / Delaney's Creek should consider biodiversity corridors and linkages when all relevant information is available.

Ocean View

- Limit future housing to remaining undeveloped / vacant lots only.
- Develop clear policy and building controls for new houses on existing lots, particularly in locations where there are steep slope constraints and biodiversity values.

Samford and Surrounds (Samford Valley)

- Limit future housing to existing undeveloped lots and direct population growth into Samford Village.
- Limit impacts in the context of maintaining and enhancing existing character of the area;

Other Considerations

In lower-lying rural residential areas and areas with high water quality and biodiversity values, some consideration of buying back lots may be worthwhile, to reduce impacts on those values and assist with consolidating growth into more acceptable areas.

4.6.4 Ranges

Key Characteristics, Trends / Pressures and Opportunities

These areas have high scenic and biodiversity significance and comprise the region's main north-south habitat and corridor linkages. Where able to be linked to the Hills and Uplands precincts, the Ranges will also play a significant role in east-west linkages.

Despite their history of hardwood forestry activity centred on mills in Bellthorpe, Dayboro, Woodford and Samford, less than 1,400ha of the 32,000 ha of the Ranges has been cleared. The timber industry has rapidly declined with more stringent controls over logging. Cleared areas are now mainly used for pastures. Lack of freehold tenure and agriculture has constrained fragmentation.

The Ranges have currently fewer than 800 lots, with over 650 not built on. These lots have limited scope for further building due to constraints eg access, bush fire, utility connections, and lack of commercial land use potential as the constraints make these areas unsuitable for pasture improvement or cropping. Nevertheless, there is a need for a clear policy and building controls in the planning scheme for new houses on existing lots, particularly in locations where there are bushfire and steep slope constraints and biodiversity values – particularly in heavily subdivided areas such as Mount Glorious and Cedar Creek.

The Ranges vegetated ridges provide a visual backdrop and a framework for conservation to the region as well as opportunities for passive recreational uses where impacts can be managed.

Planning Response

Planning Intent / Indicative Planning Criteria

Rehabilitation of former forest areas for conservation purposes and enhancement of conservation outcomes is the main priority. Also, emphasis on enhancing linkages to adjoining precincts with biodiversity values is a key consideration. Overall, retain current values and landscape characteristics.

Strong limits on development including building limiting building envelopes to the perimeter of the precinct particularly on constrained lots. No further subdivision. Building envelope provisions. Overlay provisions for bushfire hazard.

Consolidation of new development in identified areas (further work required to identify these).

Very limited range of rural uses although some provision for small scale tourism and passive recreation.

Other Considerations

Decline in forestry and lack of suitability for agriculture indicates potential for land management issues which will also require non-planning scheme responses, preferably using the SEQ Regional Plan framework.

4.6.5 Tablelands

Key Characteristics, Trends / Pressures and Opportunities

Of the 2,000 ha in precinct, 1,600 ha has been cleared. The average lot size is 30 ha and half of the 74 lots are built on. A traditional dairy area, more recently replaced by semi-commercial beef cattle grazing, the area is dominated by GQAL and Strategic Cropping Land and is therefore potentially constrained by the associated State planning policies. While suited to grazing and tree cropping due to the high level of clearing, the Tablelands also contain the best quality soils in the study area (arable and pastoral quality - Classes B and C). Tree cropping unlikely to develop now given decline generally across SEQ.

Access is from the east via Cedarton and to the north-east. The Tablelands area is relatively remote from services and characterised by large lot sizes. As dairying gradually declines, pressure for subdivision will increase and approaches which maintain the economic and commercial value of these areas will be needed. Using GQAL or SCL approaches will not be sufficient in the Moreton Bay context. Buffering to rural living and other urban uses will also be required.

Rural living is less attractive here due to relative remoteness and larger block sizes.

These areas also have economic potential as a tourism area similar in character to the Blackall Ranges, although this is subject to consideration of potential conflicts with rural uses.

Planning Response

Planning Intent / Indicative Planning Criteria

The Tablelands' predominantly rural characteristics will be retained, with support for existing dairying uses and potential for grazing to be maintained. Some support for passive recreation uses with limited impacts which contribute to retention of conservation values, where this improves management and enhancement of linkages.

Limited range of rural uses. No further subdivision. Limits on development including prescribing building envelopes on constrained lots. Separation of rural uses from sensitive land uses. Some allowance for farm-stay / bed and breakfast uses where impacts and conflicts with rural uses can be managed.

Other Considerations

Potential for conflict with encroaching rural living uses. Land management issues also require non-planning scheme responses as dairying declines, preferably using the SEQ Regional Plan framework.

4.6.6 Hills

Key Characteristics, Trends / Pressures and Opportunities

Best suited to lower intensity grazing but contains agricultural land including Class C (pastoral quality) and Class D in smaller lots than Ranges and Tableland, and located mainly in central and central west of the region. Also includes areas with conservation and biodiversity values with local landscape and aesthetic values. Vegetated ridges are of high scenic significance. Of the 8,400 ha in the Hills, 1,300 ha has been cleared. Of the 364 lots, 60% have been built on, with an average lot size of 30 ha, ranging from 9ha to 390 ha.

While cleared areas are best suited to lower intensity grazing uses, most of the area is subject to pressure for further subdivision due to relatively good access and high level of fragmentation. The most heavily fragmented areas are likely to be subject to extreme subdivision pressure are Wamuran, Neurum, Closeburn and Dayboro. Areas where lot sizes are below 30 ha are likely to see rapid conversion to rural living uses.

Planning Response

Planning Intent / Indicative Planning Criteria

The Hills will be retained as predominantly Forest Conservation areas.

A small portion of this precinct located at Wamuran will be the subject to further investigation as part of the West Caboolture West Master Planned Area master plan.

Retain uncleared areas as is, with limited if any further clearing, particularly on vegetated ridges.

Enhance conservation outcomes by requiring / defining building envelopes. No further subdivision. Overlay provisions limiting development to low bushfire risk areas. Recognise linkages to other precincts for biodiversity. Identify opportunities for consolidation of development in key areas, rather than dispersed, and away from high biodiversity value areas.

Link to offsets strategy where possible.

Other considerations

Land management issues also require non-planning scheme responses, preferably using the SEQ Regional Plan framework.

4.6.7 Foothills

Key Characteristics, Trends / Pressures and Opportunities

The Foothills precincts occur along edges of the Ranges. Of the 21,000ha in the Foothills, 18,000 is already cleared. They are characterised by more gently sloping than the Ranges - grazing quality land, generally cleared, with east-west vegetated linkages worth enhancing.

The vegetated ridges have high scenic amenity values but better access to services and utilities than Hills and Ranges. They are heavily subdivided, with approximately two-thirds of the 1,000 lots already built on. More suitable for rural living than for agriculture because of fragmentation.

Planning Response

Planning Intent / Indicative Planning Criteria

Predominant use is rural, particularly sustainable grazing. Protect existing landscape characteristics especially where they contribute to biodiversity linkages and conservation values. Rural living on existing lots supported where a building envelope can be identified not on ridgelines.

Identify opportunities for east-west linkages. No further subdivision. Building envelope provisions reflecting planning intent. Overlay provisions – bushfire. Identify opportunities for consolidation of development in key areas, rather than dispersed, and away from high biodiversity value areas.

Link to offsets strategy where possible.

Other Considerations

Education program to encourage residents to limit further land clearing and rehabilitate landscape values where possible.

4.6.8 Uplands and Low Hills

Key Characteristics, Trends / Pressures and Opportunities

Much of the central parts of Moreton Bay are in this precinct. Of the 32,600 ha in the precinct, 7,100ha have been totally cleared and planted to forest. Remainder of the area is heavily subdivided, with lot sizes between 10ha and 55ha, most with easy access. Of the 1,600 lots in Uplands and Low Hills, 900 have been built on. Rural living is the dominant use.

The locations of Campbell Pocket, Dayboro North, Kobbie Creek, Kurwongbah, Neurum, Rocksberg have been particularly heavily subdivided.

Planning Response

Planning Intent / Indicative Planning Criteria

The predominant use is rural, particularly sustainable grazing. Rural living uses will occur on existing lots. Sustainable plantation forestry is provided for within rural areas.

Identify east-west biodiversity linkages. Building envelope provisions for conservation purposes where possible. Overlay for bushfire. No further subdivision.

Other Considerations

Education program to encourage residents to limit further clearing and rehabilitate landscape values where possible and awareness of other challenges associated with rural living.

4.6.9 Undulating Plains

Key Characteristics, Trends / Pressures and Opportunities

Undulating plains act to separate urban areas from uplands, hills and ranges. The precinct has considerable diversity of rural uses, not necessarily compatible with each other. The precinct contains areas of GQAL / SCL, currently used for pineapples, plantation forestry, and grazing. However, proximity to urban areas and major utility and access corridors means rural and other landscape values have largely been replaced.

The pineapple industry in the Wamuran area of the precinct is likely to face rural living pressures due to challenges facing the industry and its location near networks and services – just over half of the existing lots in this area appear to be built on.

Planning Response

Planning Intent

Predominant use is rural, particularly sustainable cropping and grazing.

A large portion of this land (within and surrounding Wamuran) is included within the West Caboolture West Master Planned Area and will be the subject to further investigation as part of the West Caboolture West Master Planned Area master plan.

Indicative Planning Criteria

Limited opportunity to regulate house development / rural living due to large number of existing lots. Possible use of an overlay to provide detailed criteria to manage on-site and local impacts, subject to consideration of impacts on Council resourcing, housing affordability and so on.

Other Considerations

Education program to encourage residents to limit further clearing and rehabilitate landscape values where possible. Other challenges associated with rural living.

4.6.10 Inland Valleys and Streams

Key Characteristics, Trends / Pressures and Opportunities

These areas have high regional landscape aesthetic values and provide the major regional landscape aesthetic values, providing a key resource as high value pastures for the dairy and cattle industries. They contain GQAL / SCL and flow directly to North Pine, Kurwongbah and Somerset Dam water storages – with no unregulated connection to the coast. The precinct includes 5,300ha adjoining streams – some parts are prone to flash flooding. Streams and other values in the precinct contribute to biodiversity. A key role in maintaining water quality.

Planning Response

Planning Intent / Indicative Planning Criteria

Predominantly rural due to GQAL and flood risk, particularly for sustainable cropping, biodiversity and water quality enhancement.

All uses should be restricted to these. Identify east-west linkages. Limit further subdivision and non-rural development and maintain potential for sustainable cropping. Encourage land consolidation to avoid areas with high biodiversity values, flooding or suited to agriculture.

4.6.11 Alluvial Plains

Key Characteristics, Trends / Pressures and Opportunities

These areas are streams and associated plains linking inland uplands to the coast. They provide key open space, biodiversity and scenic amenity values to coastal districts. Of the 2,200 ha in the precinct, 1,700 ha has been cleared and large areas contain plantation forestry. Non-forestry areas have lot sizes of between 4ha and 10 ha and are over 90% built on.

Planning Response

Planning Intent

Forestry areas to be predominantly rural, particularly for sustainable forestry. Existing lots in areas adjoining urban areas remain as rural, with strong uptake of rural living activity expected. No further expansion of designated rural residential in these areas.

Indicative Planning Criteria

Limit development and further subdivision. Identify linkages to inland areas. Encourage land consolidation to avoid areas with high biodiversity values, flooding or suited to agriculture.

Other Considerations

Retain and rehabilitate the flood plain and other values.

4.6.12 Acid Sulfate Areas

Key Characteristics, Trends / Pressures and Opportunities

This precinct contains areas where acid sulfate soils are potentially identified and provides key open space, biodiversity and scenic amenity values to coastal districts. The areas are located near coastal townships and contribute to a range of constraints to further development in the coastal townships.

Planning Response

Planning Intent

Limit further development including subdivision. No expansion of coastal towns.

Indicative Planning Criteria

Maintain existing approach to management of ASS, in particular in relation to disturbance, as required by SPP.

Other Considerations

Council's adaptation strategy (as per the Qld Coastal Plan requirements) will identify development constraints in this precinct relating to issues of storm tide inundation and erosion.

Infrastructure capacity will be a key constraint to further development – need for infrastructure to determine development capacity (rather than vice versa).

4.6.13 Key Resource Areas

Key Characteristics, Trends / Pressures and Opportunities

This precincts contains six Key Resource Areas – three sand and alluvium at Donnybrook and Toorbul, and the remainder are hard rock resources at Young's Crossing, Rush Creek and D'Aguilar. There are 5,500ha in 166 lots in the precinct, of which 70% are not built on. They have an average lot size of 33ha, and 30% have been cleared.

The need for separation from sensitive land uses is a major issue. Known to, or likely to, include areas of high scenic or biodiversity values. Pressure to expand extraction operations into separation areas is likely in the future.

Planning Response

Planning Intent / Indicative Planning Criteria

Retain potential for existing and future extraction operations. Generally, and particularly in relation to KRA 46 (north of Forbes Creek and Rush Creek), the separation areas remain in their natural state, particularly where they contain ecological and scenic values. Link to offsets strategy where possible.

Criteria required for both (i) operation / expansion of existing and potential KRAs and new extractive operations and (ii) new uses establishing in separation areas, in compliance with State Planning Policy 2/07 - Protection of Extractive Resources (SPP 2/07).

SPP 2/07 requires that uses be limited in separation areas. House development on existing lots is the main issue for the planning scheme. Key criteria of the SPP include that land use strategies:

- do not increase the numbers of people in the Key Resource Area - should focus on not increasing the number of people living in the separation area for the resource/processing area and the separation area for the transport route;
- seek to minimise the potential adverse effects from existing or future extractive industries on people working or congregating in the separation area;
- seek to address concerns about the safe and efficient transportation of extractive resources along the identified transport route; and
- extractive industry development should not compromise the function of the separation area in providing a buffer between extractive/processing operations and any incompatible uses outside the separation area.

Also, the SPP specifies development to which the Policy applies should be made assessable or self-assessable.

The SPP states that the rationale for determining development compatibility varies for each of the component parts of a KRA as follows:

- (a) within the resource/processing area, development should not alienate or add a significant cost or other impediment to undertaking a future extractive industry development, thereby potentially limiting the long-term availability of extractive resource for extractive industries;
- (b) within the separation area, development should not result in a use that would be sensitive to potential adverse environmental effects from extractive industry operations;
- (c) within the transport route's separation area, development should not increase the number of residents who would suffer potential adverse effects of noise, dust and ground vibration from trucks hauling extractive materials along the route; and
- (d) alongside the transport route, development should not adversely affect the safe and efficient use of the transport route by vehicles transporting extractive resources.

This suggests that a policy of strongly limiting development within separation areas to the extent possible, including houses on existing lots, is advisable.

4.6.14 Water Supply Catchments

Key Characteristics

Including land surrounding the North Pine and Kurwongbah storages areas. Land uses in these areas are either directly managed by water supply authorities, or owned by SEQ Water and leased back for grazing purposes.

Planning Intent

Reinforce their role as water supply catchments.

Indicative Planning Criteria

Similar to existing approaches. Perhaps an overlay and/or integrate with other precincts.

Other Considerations

SEQ Water also has a referral agency role in development on freehold land.

APPENDIX A

Methodology

MORETON BAY RURAL AREAS STRATEGY 2012

Methodology

Stage	Focus	Key tasks
Phase 1 – Inception		
Objectives: - To commence the project, confirm the methodology and reporting expectations, obtain background information, data and key contacts - Study area tour Outcome/outputs: - Contract documentation		
1.1	Inception Meeting	Meeting to: - Establish project arrangements - Obtain relevant data - Briefing on current strategic framework progress
1.2	Start up Workshop	Whole of project team workshop to: - Confirm relative roles, scope of works and project timeframes; - Preliminary discussion of background information and issues

Stage	Focus	Key tasks
Phase 2 – Review of Background Material		
Objectives: Review relevant reports, data and information in order to develop a preliminary understanding the demographic, environmental, economic, social and technological and attitudinal changes impacting in rural areas in MBRC		
Outcome/outputs: Comprehensive understanding of influences relevant to the Moreton Bay region		
2.1	Policy and Planning Context Review	- Undertake a detailed review of relevant literature and Council reports including: - SEQ Regional Plan 2009-2036, Rural Futures Strategy, Rural Precinct Guidelines - MBRC work on strategic framework, place types and character areas - Next Generation Planning Handbook and Sprawl Repair Manual - MBRC Corporate Plan 2009-2014 - MBRC Draft Community Plan - existing planning schemes - future Land Demand Study - other previous planning studies - relevant state planning policies - SEQ Catchments NRM plan
2.2	Rural Land / Activity Review	- Compile relevant data sets: GQAL/SCL, topography/terrain, constraints (flood, bushfire, landslide (if available), extractive resources, waterways and catchments - Characterise agricultural forms of rural land use and define their resource requirements - Identification of key stakeholders - Lot size /land fragmentation analysis - Identification of preliminary rural production “precincts” (having regard to catchments and character areas already identified by MBRC)
2.3	Housing and Demographic Review	- Review population projections for relevant social planning “catchment” areas and confirm projections to be used for overall study (2008 CCD level projections vs 2011 SLA level population projections) - Confirm and obtain latest data and obtain relevant demographic data

Stage	Focus	Key tasks
		▪ Prepare demographic analysis at the catchment level (based on 2006 ABS data) and LGA level (using updated OESR data where available) that can be used by the whole project team ▪ Visits to each centre ▪ Review of existing housing stock, general level of service and land subdivision patterns in towns based on review of: - ABS census data - OESR data (including broad hectare information and the residential land supply and dwelling activity monitor) - REIQ market monitor data - any GIS data, dwelling and lot approval data (if provided by Council) - Review consultation outcomes relating to housing provided through the community plan consultation program
		▪ Undertake targeted consultation to ascertain locally specific housing issues and needs within each catchment, which will involve: - interviews with Council officers from Strategic Planning and Development branch / Community and Environmental Services branch - a sample of local real estate agents for purchase and rental property, affordability issues, and needs/issues that are not being met - a sample of caravan park/mobile home providers - a sample of retirement and aged care accommodation providers - targeted social housing providers or a housing interagency or DOCS (to determine affordability issues and unmet housing needs as opposed to social housing needs)

Stage	Focus	Key tasks
2.4	Employment / Economic Review	▪ Policy Review ▪ Review of employment and economic data held by Council ▪ Historic industry sector analysis, including employment, value added (if available) ▪ Overview of retail and commercial areas – visits to each centre ▪ Journey to work information (to determine the extent of self containment) ▪ Identification of relevant stakeholders (with Council input) and initial discussions with them regarding economic futures for Moreton ▪ SWOT analysis for Moreton Bay Regional Council area ▪ Overview of: - industry mix and structure - location quotient (strengths of industry) - self containment - key players in the region - commercial area summary - strengths, weaknesses, opportunity and threats
2.5	Ecological, Scenic and Open Space Review	▪ Compile data sets of environmental / biodiversity / koala values / corridors / wetlands as relevant ▪ Compile scenic amenity data ▪ Review draft open space strategy if available and where appropriate ▪ Review relevant statutory obligations
2.6	Infrastructure and Water Cycle Review	▪ Overview (at a strategic level) of infrastructure status/planning relevant to the study area ▪ A review of the likely impacts of new or emerging policy, including overview of total water cycle management plan (catchment/water quality) implications ▪ Meetings with Council water/sewer/stormwater/transport officers ▪ Discussions with Energex / Powerlink and Telstra ▪ Compile a constraints and opportunities plan mapping where water / sewer / transport / water quality / flooding may or may not constrain and show on a plan

Stage	Focus	Key tasks
Phase 3 – Synthesis of Issues and Development of Place Type Rationale		
Objectives: - Develop team-wide understanding of issues, opportunities and implications. - Consider emerging spatial characteristics on which place types of precincts might be based (eg water catchments, landscape character, rural land types, township/servicing catchments, economic opportunity areas etc) - Preliminary identification of relative roles, characteristics, influences, policy implications and targets for the various places/precincts Outcome/outputs: - Preliminary discussion paper - Agreed focus and spatial context for subsequent investigations		
3.1	Discussion Paper	- Development of a discussion paper and mapping as the basis for team workshop, summarising: - policy context - preliminary proposals for place typology - economic, housing and social challenges associated with rural centres and key components for success/social sustainability - thoughts on future policy directions for centres: - self containment targets - industry mix targets – existing industry and new targets - retail and commercial centre targets – role, floor space, types of shops, functions etc. - infrastructure constraints and opportunities - existing and potential rural land activities / industries and land resources - natural resource condition/function - relevant precincts or catchment areas based on information collected and analysed to date - potential policy implications for Council
3.2	Team Workshop	- Whole of project team workshop to: - review identified precincts/catchments character/values/influences - agree precincts/catchments to use as basis for analysis phase - consider policy implications, opportunities, targets - agree/align focus for subsequent investigations

Stage	Focus	Key tasks
Phase 4 – Assessments (Residential, Economic/Employment, Environmental, Infrastructure)		
Objectives: - Targeted assessments based on preliminary place types/precincts (towns and rural areas) to confirm opportunities, potential roles and functions (relevant to each investigation area) and develop preliminary strategy responses. Outcome/outputs: - Preliminary strategy responses by investigation “theme” area		
4.1	Residential and Housing Assessment	- Develop a simple housing model to extrapolate and quantify housing type needs (diversity) by future household type using three (3) scenarios: - straight line projection (i.e. households continue to be provided with existing housing preferences rates as per ABS 2006 Expanded Community Profile) - modest change in housing preferences - significant change in housing preferences - The housing model will provide an overall quantitative dwelling diversity target, which will then be distributed into catchments based on information obtained through the demographic analysis, qualitative information, consultation data and locational criteria. - Workshop with Council officers from the Strategic Planning and Development branch to: - confirm assumptions behind the modest change and significant change scenarios in the housing model - identify emerging housing characteristics for each catchment areas - develop a preliminary profile of catchment areas based around the role and function of each catchment - land availability, infill opportunities and urban footprint - Identify current gaps and future housing needs for each catchment area including: - appropriateness of supply to meet emerging housing preferences - affordability of housing and appropriateness of housing type - desirable future dwelling mix, density and size - principles of housing location and design to achieve desired outcomes and housing affordability - desirable means of accommodating the identified housing requirements

Stage	Focus	Key tasks
4.2	Economic /Employment Assessment	- Utilising data and targets developed in phases 2 and 3 (self containment targets; industry mix targets – existing industry and new targets; and, retail and commercial centre targets – role, floor space, types of shops, functions), determine: - where the study area and its component parts currently are, and what is needed to get to where it wants to be. This will be completed by utilising the success criteria, and indicating key actions / requirements to move Moreton Bay from its current state to its desired state - stakeholders views/desires regarding the targets and required actions - elements that can be incorporated into the planning scheme or other Council instruments will be identified - this assessment will culminate in a brief economic development strategy for the rural sector in the identified industries
4.3	Rural Land / Activity Assessment	- In parallel with the economic assessment above, develop land and policy response requirements for future agricultural use /primary industry sector activity having regard to identified opportunities and relevant SEQ and state policy context. - Discussion with key stakeholders (including DERM) as appropriate - Revision of precincts mapping
4.4	Ecological and Offsets Assessment	- Identify the relationship between local government biodiversity and corridor mapping and state and federal instruments such as the VMA / Koala SPRP / NCA / QCP-SPP / EPBC - Acknowledge other important relationships beyond the scope of these investigations, such as the possible relationships between bushfire management (study currently underway by others) and biodiversity, and relationships with rural production/ economic development opportunities and other development pressures (and relevant to identified places/precincts) - Consider the interfaces between rural and natural areas & rural and urban areas. How do we identify / classify / address them? - Review opportunities and legislation for offsets at the State and local levels - Identify any opportunities to review other emerging Local Government policies. (Are these consistent, fair and transparent? Do any of these provide a reasonable basis for MBRC policy?) - Review the opportunities to build upon environmental corridors using offsets from infrastructure - Discussions with DERM as appropriate

Stage	Focus	Key tasks
4.5	Scenic Amenity and Open Space Assessments	- Identify the relationship between the Caboolture Shire Scenic Amenity Study 2002/2003 and the relevant scenic amenity components of the Queensland Coastal Plan State Planning Policy for Coastal Protection - Also consider the relevance of SEQ Regional Plan Guideline 8, notwithstanding Council's preference for the rural areas strategy to determine the relevance of the Regional Plan rather than vice versa - Review the issues related to land being used for scenic amenity and visual quality protection: what levels of protection are appropriate and what this might mean for development? - Consider whether and how the above landscape resources might feed into the broad regional open space strategy
4.6	Infrastructure and Water Cycle Review	- An assessment of the impact of probable or proposed development and planning on infrastructure needs. In more detail this may include: - interrogation of the MBRC TWCM outcomes to date - an assessment of current and proposed water and sewer networks, stormwater and flood management infrastructure with a high level review of the capacity of existing infrastructure to meet projected demands. This will be correlated with the preferred directions and strategies determined to date in the TWCM planning process. Reviews will be conducted with the utility providers - an assessment of current and proposed transport infrastructure with a high level review of the capacity of existing infrastructure to meet projected demands - an assessment of current and proposed power and communications infrastructure with a high level review of the capacity of existing infrastructure to meet projected demands. This will principally be addressed in discussions with the relevant utilities - conceptual planning for the implementation of the likely development needs for infrastructure to support the preferred strategic planning
4.7	Development of place typology	- Further refinement and application of place/precinct structure (having regard to assessments below) - Coordination of assessment work

Stage	Focus	Key tasks
Phase 5 – Recommendations		
Objectives: - To draw together the component investigations into a coherent strategy for non urban lands and rural towns, for incorporation into Council's draft strategic framework. Outcome/outputs: - Effective recommendations for implementation - Final strategy report		
5.1	Discussion Paper	Development of a discussion paper and mapping as the basis for team workshoping, summarising outcomes of the above assessments
5.2	Team Workshop	- Whole of project team workshop to: - synthesize the analysis and consider consolidated policy requirements that emerge - confirm place types / precincts to use as basis for defining role, function and character (and for inclusion in the strategic framework transect) - agree primary policy response requirements for implementation through the planning scheme (and areas to be addressed by other mechanisms)
5.3	Draft Final Strategy Report and Mapping	Reporting of recommendations with a focus on scheme based implementation (including developing place typology)
5.4	Councillor presentation	Presentation of study approach and outcomes to Councillors, as determined by Council officers
5.5	Review and Finalisation	- Council project management team to review draft report and provide comment - Prepare final report incorporating Council's feedback

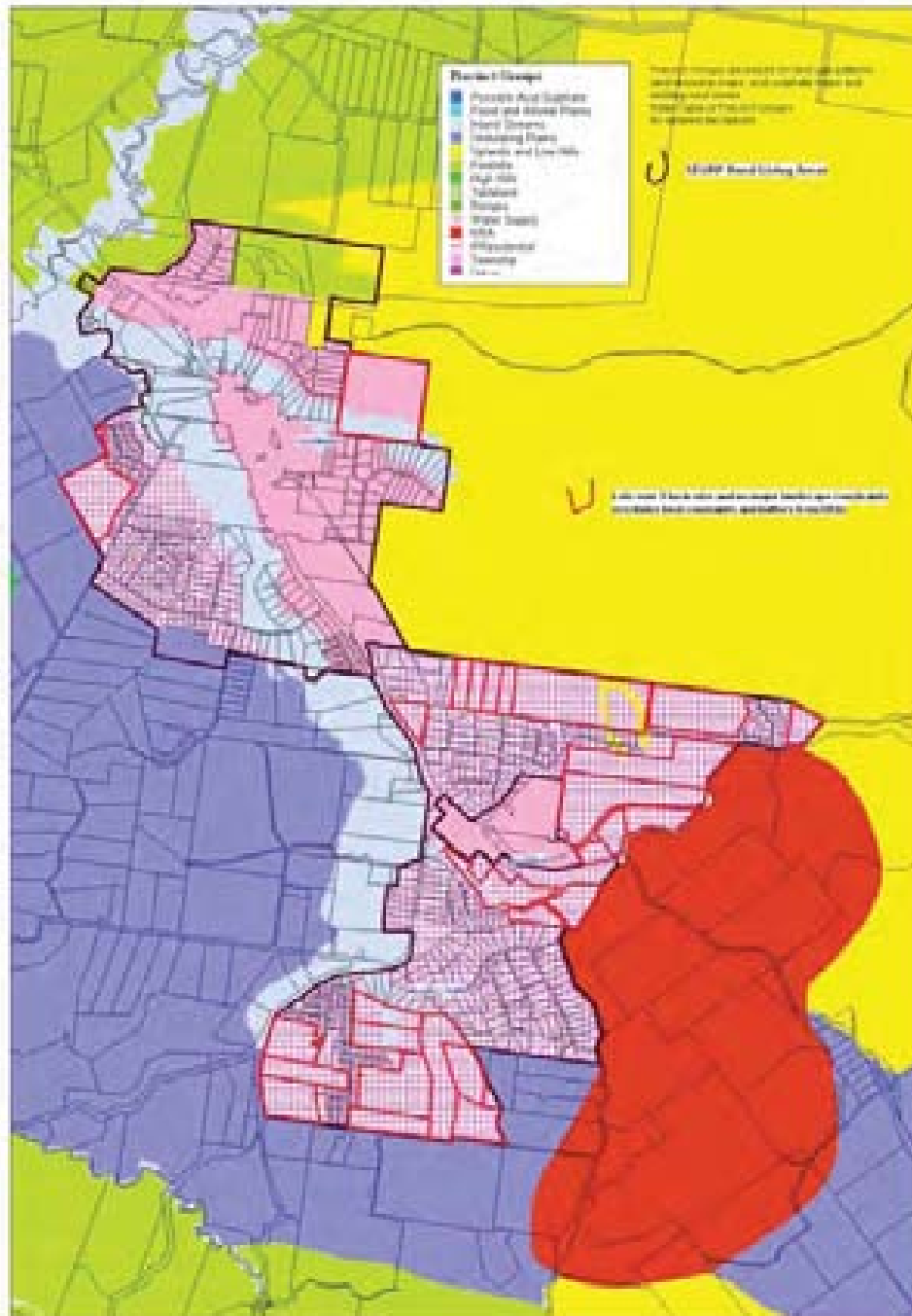
APPENDIX B

Rural Land Analysis (LRAM)

Woodford – D'Aguilar Area

There are 655 rural residential blocks of which 111 are not built on.

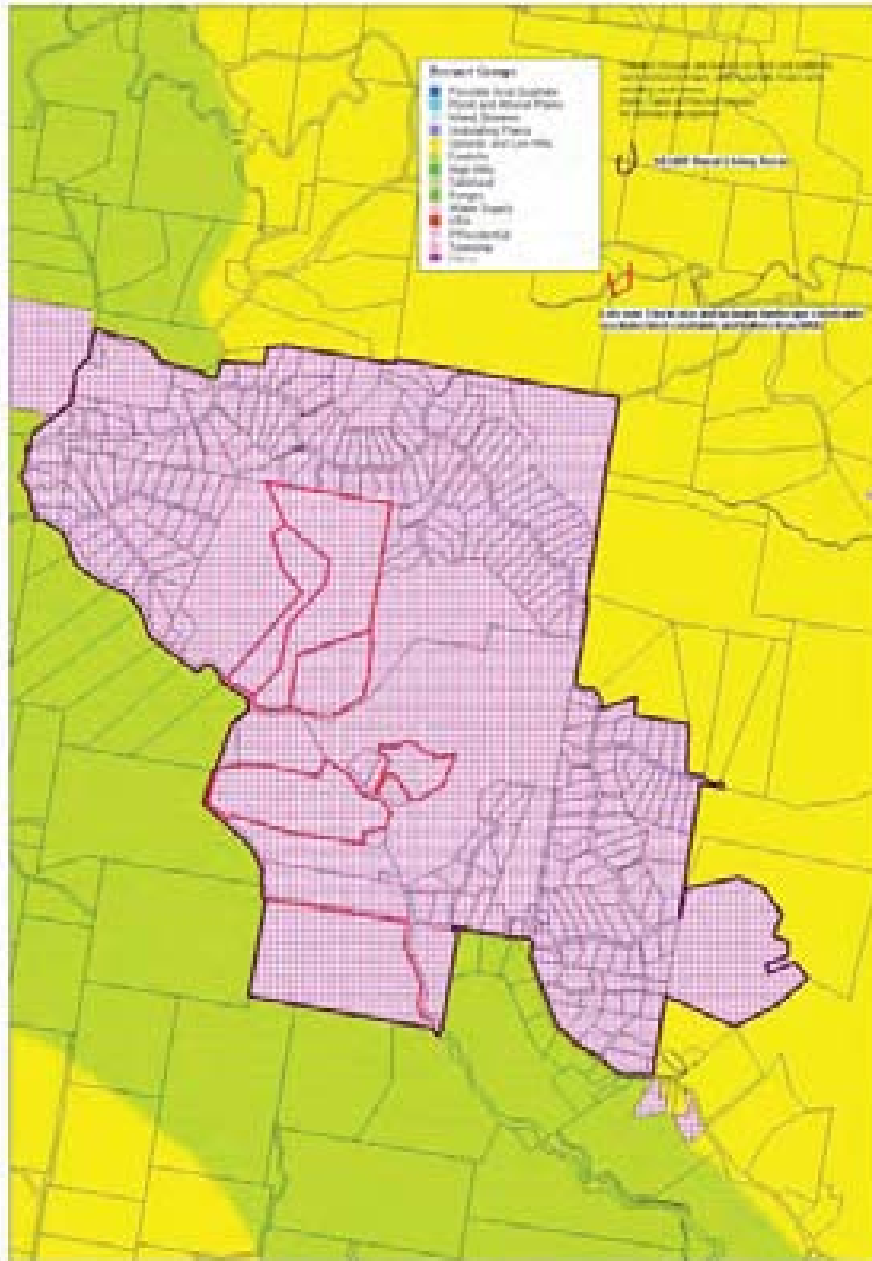
There are 620 ha in 28 larger blocks that fall within the RL area of SEQRP which have few landscape constraints to further subdivision.



Rocksberg/Mt Pleasant

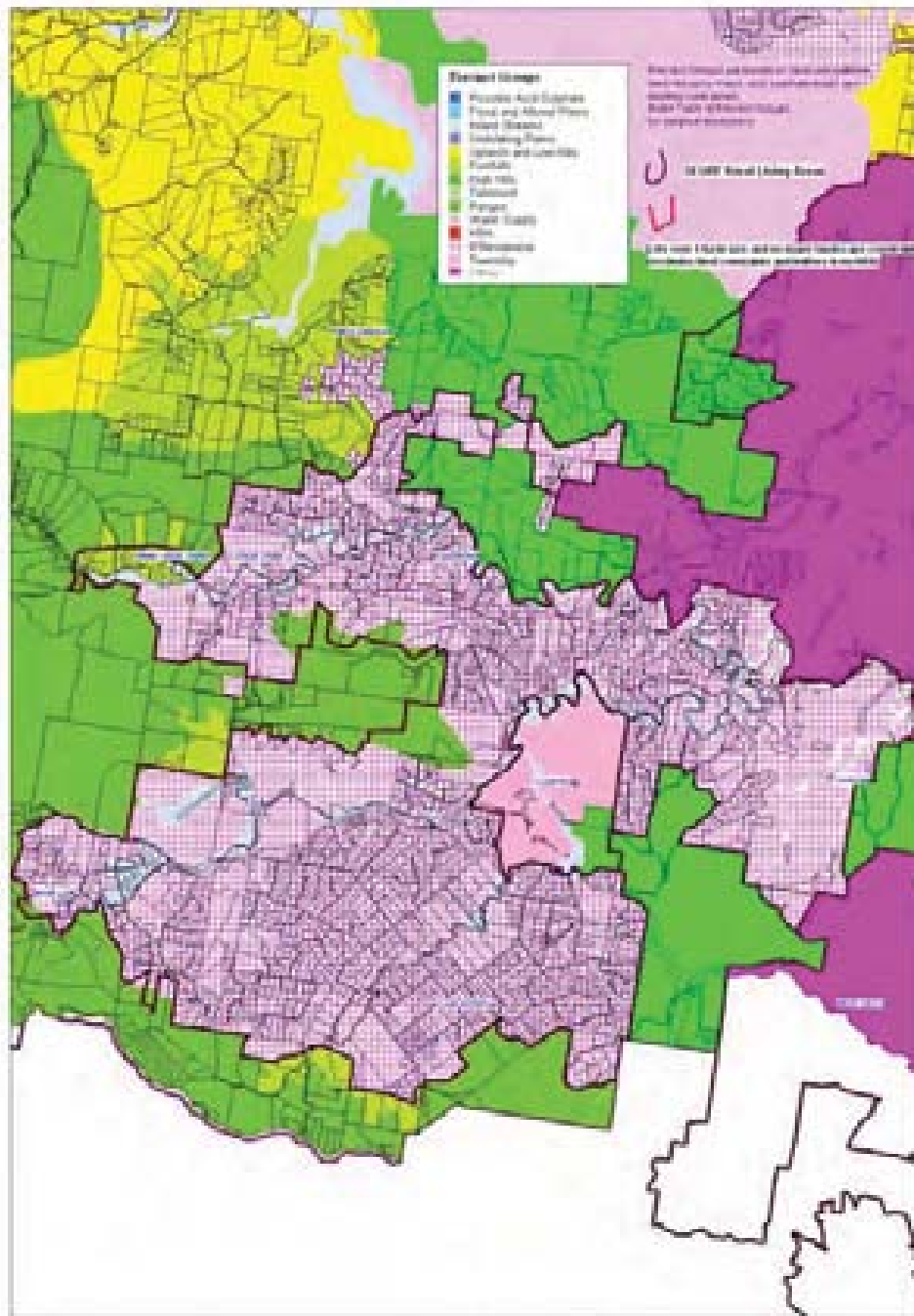
There are 270 rural residential blocks of which 108 are not built on.

There are 170 ha in 6 larger blocks that fall within the RL area of SEQRP which have some landscape constraints to further subdivision that will reduce yield from any subdivision.



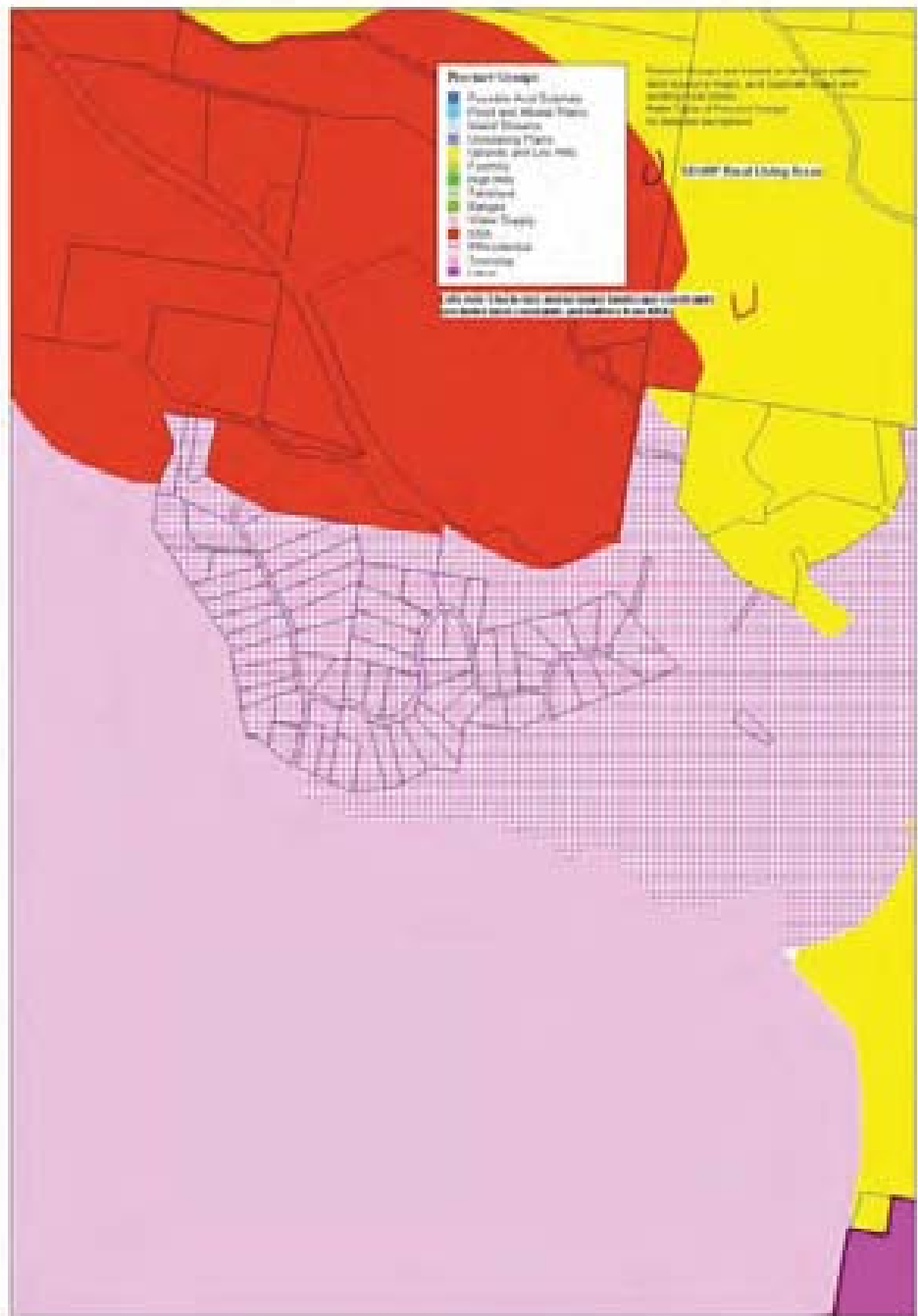
Samford

There are 2100 lots of which 105 are not built on. Whilst there are some larger blocks, in the main these have constraints due to landscape slope or riparian features of local significance.



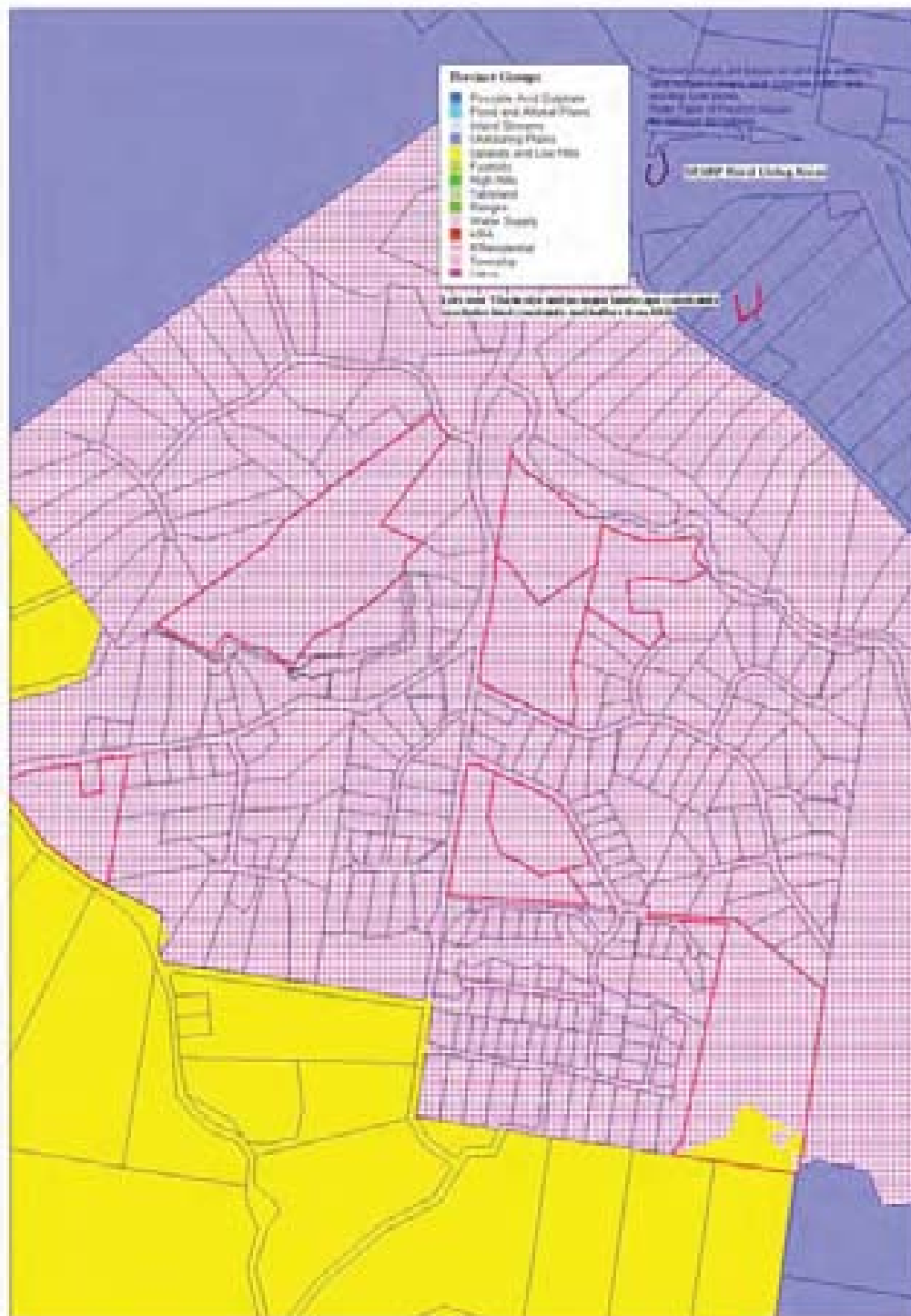
Kurwongbah

75 lots, 8 not built on and no larger blocks suited for further subdivision. Area not within SEQRP Rural Living area.



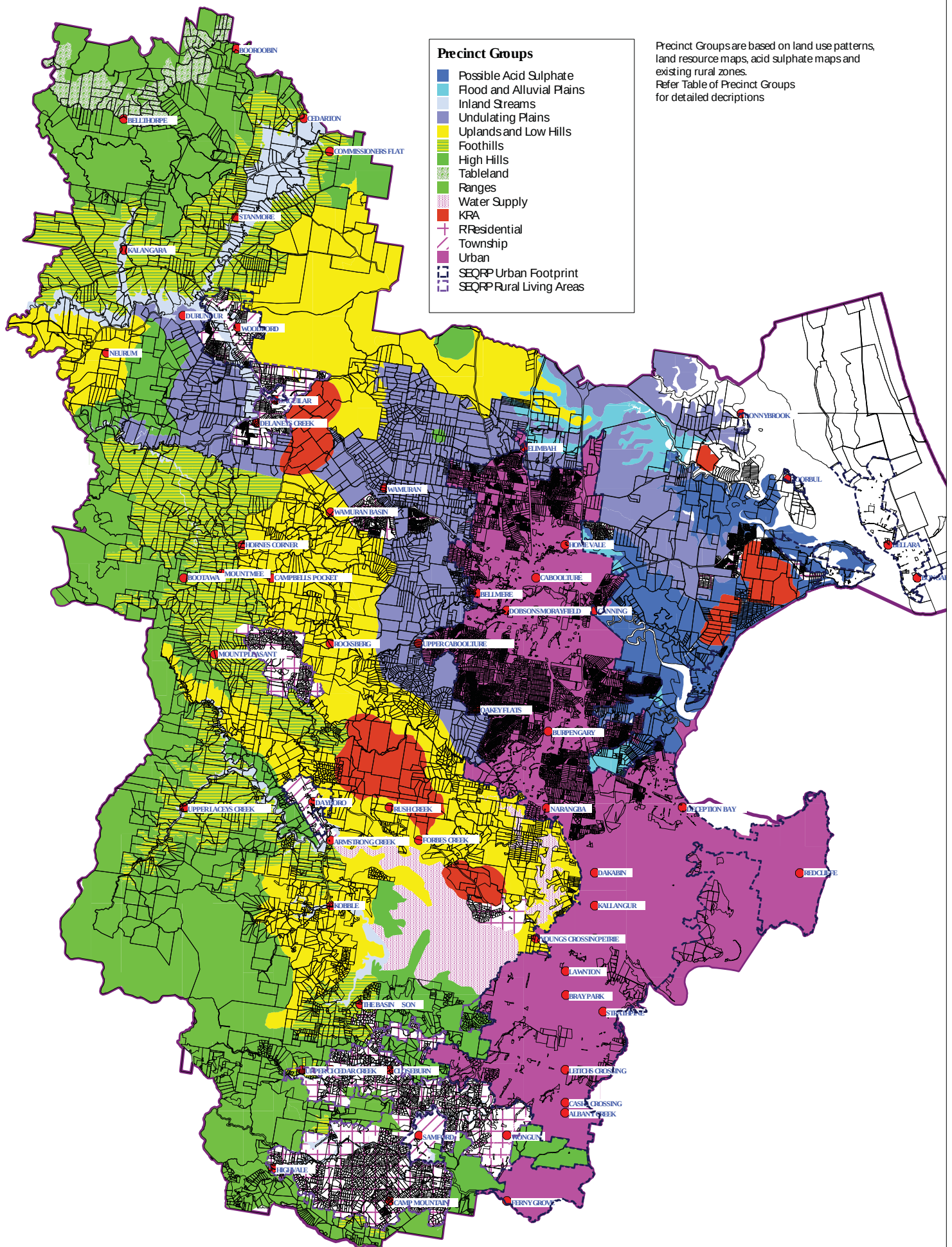
Wamuran

This area contains 545 lots with 55 not built on including an area immediately east of the figure below. There are 8 larger lots totaling 55 ha that may be unconstrained for further subdivision. The area is not within the SEQRP rural living area.



Coastal

There are existing rural residential areas on the coastal plains that are very heavily built on. None of these areas contain any residual larger blocks. Apart from this acid sulphate flooding etc would limit any expansion.



Precinct Group	Catchment	Total ha	LOCALE	GQAL	LOTS	Built on %	Lot not built on	Cleared %	ha cleared	Plantation Forestry %	Forestry Plantation ha	Arable Use %	Arable crop ha	Pineapple %	Pineapple ha	Ha Pastures	Avg Lot Size ha	
Ranges	MARY	1579	Bellthorpe	C/D	11	10	10	1	16	0	0	0	0	0	0	16	144	
Ranges	STANLEY	7133	Bellthorpe/Boor	C/D	146	5	139	10	713	0	0	0	0	0	0	713	49	
Ranges	STANLEY	3363	Boolawa W	D	40	40	40	5	169	0	0	0	0	0	0	169	85	
Ranges	Pine	479	Cedar Ck	D/C	35	40	21	25	120	0	0	0	0	0	0	120	14	
Ranges	Pine	364	Mt Glorious	D	75	70	23	5	18	0	0	0	0	0	0	18	5	
Ranges	Pine	1194	Mt Glorious Roa	D	80	40	48	10	119	0	0	0	0	0	0	119	15	
Ranges	Pine	1090	Samford W	D/C	40	30	28	20	218	0	0	0	0	0	0	218	27	
Ranges	Pine	16880	Upper Lacey	D	350	0	350	0	0	0	0	0	0	0	0	0	48	
		32103			777		658		1374		0		0		0	1374	41	
Tableland	MARY	2016	Bellthorpe	B/C	74	50	37	80	1613	0	0	0	0	0	0	1613	27	
Hills	Pine	491	Closeburn	D/C	45	60	18	30	147	0	0	0	0	0	0	147	11	
Hills	STANLEY	910	Commissioners F	D/C	5	0	5	0	0	0	0	0	0	0	0	0	182	
Hills	Pine	627	Dayboro W	D/C	55	50	28	50	314	0	0	0	0	0	0	314	11	
Hills	Caboolture	323	Elimbah N	D	1	0	1	0	0	0	0	0	0	0	0	0	323	
Hills	Pine	652	Ferry Grove N	D	5	0	5	0	0	0	0	0	0	0	0	0	130	
Hills	Pine	390	Kobbie	D	1	0	1	0	0	0	0	0	0	0	0	0	390	
Hills	Pine	2192	Mt Samson E	D/C	160	80	32	25	548	0	0	0	0	0	0	548	14	
Hills	STANLEY	1962	Neurum	C/D	60	5	57	15	294	0	0	0	0	0	0	294	33	
Hills	Pine	828	Samford SE	D	26	40	16	5	41	0	0	0	0	0	0	41	32	
Hills	Caboolture	51	Wanuran N	D	6	50	3	0	0	100	51	0	0	0	0	0	9	
		8426			364		165		1345		51		0		0	1294	23	
Foothills	STANLEY	136	Boolawa S	C	10	40	6	100	136	0	0	0	0	0	0	136	14	
Foothills	Pine	72	Camp Mountain	C/D	15	90	2	100	72	0	0	0	0	0	0	72	5	
Foothills	Pine	41	Camp Mountain	C/D	12	100	0	100	41	0	0	0	0	0	0	41	3	
Foothills	Pine	1402	Dayboro W	C	105	0	105	95	1332	0	0	0	0	0	0	1332	13	
Foothills	STANLEY	5713	Kalangara	C	30	66	10	90	5142	0	0	0	0	0	0	5142	190	
Foothills	STANLEY	4892	Mt Meen NW	C/D	185	15	157	90	4403	0	0	0	0	0	0	4403	26	
Foothills	Pine	3309	Mt Pleasant	C/D	200	25	150	50	1655	0	0	0	0	0	0	1655	17	
Foothills	Pine	1214	Mt Samson	C	180	60	72	95	1154	0	0	0	0	0	0	1154	7	
Foothills	Pine	81	Samford W	D/C	4	100	0	70	57	0	0	0	0	0	0	57	20	
Foothills	STANLEY	1905	Stannore E	C/B	90	90	9	95	1810	0	0	5	95	0	0	1810	21	
Foothills	Pine	108	Upper Cedar Ck	C/D	27	80	5	60	65	0	0	0	0	0	0	65	4	
Foothills	Pine	1004	Upper Lacey	C/D	40	10	36	50	502	0	0	50	0	0	0	502	25	
Foothills	Pine	1369	Upper Lacey	C/D	95	10	86	95	1301	0	0	0	0	0	0	1301	14	
		21248			993		638		17668		0		95		0	17668	21	
Uplands	Pine	4302	Campbell Pocket	D/C	215	35	140	50	2151	0	0	0	0	0	0	2151	20	
Uplands	Pine	1918	Dayboro N	C	180	60	72	100	1918	0	0	10	192	0	0	1726	11	
Uplands	Caboolture	2616	Elimbah N	C/D	40	0	40	100	2616	100	2616	0	0	0	0	0	65	
Uplands	Pine	4081	Kobbie	D/C	310	90	31	30	1224	0	0	0	0	0	0	1224	13	
Uplands	Pine	2427	Kunwongbah	C/D	240	70	72	50	1213	0	0	0	0	0	0	1213	10	
Uplands	STANLEY	2258	Neurum	C	82	25	62	90	2032	0	0	10	226	0	0	1806	28	
Uplands	Pine	7104	Rocksberg/Forbe	C/D	495	50	248	0	0	0	0	0	0	0	0	0	14	
Uplands	STANLEY	1707	Stannore E	C	13	0	13	90	1537	90	1537	0	0	0	0	0	131	
Uplands	Pine	723	Wanuran W	C/D	2	50	1	100	723	100	723	0	0	0	0	0	362	
Uplands	STANLEY	3786	Woodford E	C	15	15	13	60	2271	60	2271	0	0	0	0	0	252	
Uplands	Caboolture	716	Woodford E	D/C	13	40	8	10	72	0	0	0	0	0	0	72	55	
		31638			1605		698		15758		7148		418		0	8610	20	
Undulating Plai	Pine	29	Deception BW	B/C	10	100	0	100	29	0	0	0	0	0	0	29	3	
Undulating Plai	Caboolture	390	Donnybrook	C	1	0	1	100	390	100	390	0	0	0	0	0	390	40
Undulating Plai	Caboolture	957	Donnybrook	B/C	40	50	20	100	957	10	478	10	96	10	96	287	24	
Undulating Plai	Caboolture	568	Elimbah	B/C	50	50	25	70	398	10	57	10	57	0	0	284	11	
Undulating Plai	Pine	398	Elimbah	B/C	40	90	4	90	358	0	0	40	159	0	0	199	10	
Undulating Plai	Caboolture	548	Elimbah NE	C/D	4	0	4	100	548	100	548	0	0	0	0	0	137	

Precinct Group	Catchment	Total ha	LOCALE	GGAL	LOTS	Built on %	Lot not built on	Cleared %	ha cleared	Plantation Forestry %	Forestry Plantation ha	Arable Use %	Arable crop ha	Pineapple %	Pineapple ha	Ha Pastures	Avg Lot Size ha
Undulating Plai	Caboolture	2738	Homevale E	B/C	40	0	40	90	2464	40	1095	10	274	0	0	1095	68
Undulating Plai	Pine	822	Homevale E	C	25	80	5	95	781	25	206	10	82	10	82	411	33
Undulating Plai	Pine	3496	Upper Caboolture	C/B	60	60	144	80	2797	0	0	15	524	0	0	2273	10
Undulating Plai	Pine	3479	Wamuran	B/C	410	50	205	80	2783	0	0	10	348	30	1044	1392	8
Undulating Plai	Pine	545	Wamuran	C	13	15	11	30	163	0	0	0	0	0	0	163	42
Undulating Plai	Caboolture	2340	Wamuran N	B/C	245	35	159	80	1872	0	0	10	234	60	1404	234	10
Undulating Plai	STANLEY	3258	Woodford S	C	85	50	43	75	2444	0	0	5	163	0	0	2281	38
		19568			1323		661		15984		2774		1937		2626	10584	15
Inland Valley	Pine	583	Armstrong/Lacey														
Inland Valley	Pine	222	Closeburn														
Inland Valley	Pine	392	Kobbie														
Inland Valley	STANLEY	197	Neurum														
Inland Valley	Pine	411	Samford														
Inland Valley	STANLEY	3506	Stanmore/Neurum														
		5310															
Alluvial Plain	Pine	39	Deception B N	C/D	10	100	0	100	39	0	0	0	0	0	0	39	4
Alluvial Plain	Pine	297	Deception Bay	B/C	30	90	3	50	148	0	0	0	0	0	0	148	10
Alluvial Plain	Caboolture	1033	Elimbah	B/C	45	30	32	70	723	20	207	0	524	5	52	465	23
Alluvial Plain	Caboolture	694	Elimbah E	C/D	5	50	3	100	694	80	555	5	35	0	0	104	139
Alluvial Plain	Pine	136	Homevale	C	4	75	1	100	136	60	82	40	55	0	0	0	34
		2199			94		38		1741		844		89		52	845	23
Acid Sulphate	Pine	5186	Deception B N	D/C	410	20	328	70	3630	0	0	0	0	0	0	3630	13
Acid Sulphate	Caboolture	2261	Toorbul S	C	148	50	74	50	1131	0	0	0	0	0	0	1131	15
		7447			558		402		4761		0		0		0	4761	13
KRA	152	1218	Dagular	D/C	16	5	15	30	366	0	0	0	0	0	0	0	76
KRA	Caboolture	134	Donnybrook	D	1	0	1	0	0	0	0	0	0	0	0	0	134
KRA	Pine	2324	Rush Creek	D/C	70	30	49	30	697	0	0	0	0	0	0	0	33
KRA	Pine	410	Toorbul S	D/C	25	0	25	0	0	0	0	0	0	0	0	0	16
KRA	Pine	791	Toorbul S	D/C	35	5	33	30	237	0	0	0	0	0	0	0	23
KRA	Pine	638	Youngs Xing	D/C	19	70	6	60	383	0	0	0	0	0	0	0	34
		5513			166		129		1682		0		0		0	0	33
RResidential	Pine	66	Canning E		30	60	12										2
RResidential	STANLEY	1094	Dagular		455	80	91										2
RResidential	Pine	132	Homevale		125	100	0										1
RResidential	Pine	418	Kurwongbah		75	90	8										6
RResidential	Pine	1103	Rocksberg W		270	60	108										4
RResidential	Pine	7230	Samford		2100	95	105										3
RResidential	Caboolture	427	Toorbul S		710	80	142										1
RResidential	Pine	595	Wamuran S		545	90	55										1
RResidential	STANLEY	238	Woodford		200	90	20										1
		11303			4510		540										3
Township	STANLEY	80	Dagular														
Township	Pine	439	Dayboro														
Township	Pine	408	Samford														
Township	STANLEY	308	Woodford														
Township	STANLEY	224	Woodford														
Totals		142716			10298		3837		60242		10817	0	2539		2677	46748	23

Lot numbers are counts of the number of lots whose centroids fall within the Precinct Group polygon. It is not an accurate count and should be regarded as an estimate only. This methodology is unreliable for Inland Valleys which are long thin polygons where lot centroids often fall in contiguous polygons.

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APPENDIX C

Housing Assessment
(Buckley Vann)

APPENDIX C (a)

Demographic and Housing Profile

APPENDIX A – DEMOGRAPHIC AND HOUSING PROFILE

1.0 POPULATION PROJECTIONS

1.1 Moreton Bay Regional Council

The Moreton Bay Regional Council area has experienced strong growth since 2002, growing at an average annual rate of 3.3 per cent (see **Table 1**).

Table 1: Estimated Resident Population, Moreton Bay Regional Council

Population at 30 June	Estimated Resident Population	Annual Change
2002	294,530	-
2003	304,792	3.5%
2004	315,505	3.5%
2005	325,067	3.0%
2006	332,862	2.4%
2007	344,878	3.6%
2008	357,902	3.8%
2009 (revised)	371,155	3.7%
2010 (preliminary)	382,280	3.0%
Average Annual Rate – 2002-2010	-	3.3%

Source: OESR 2011a. Population and housing profile: Moreton Bay Regional Council (May 2011);

Between 2011 and 2031, the population is projected to increase to 533,170 people, an increase of around 143,000 people (medium series projections) (see **Table 2**). According to medium series population projections, the population growth rate is expected to gradually decrease.

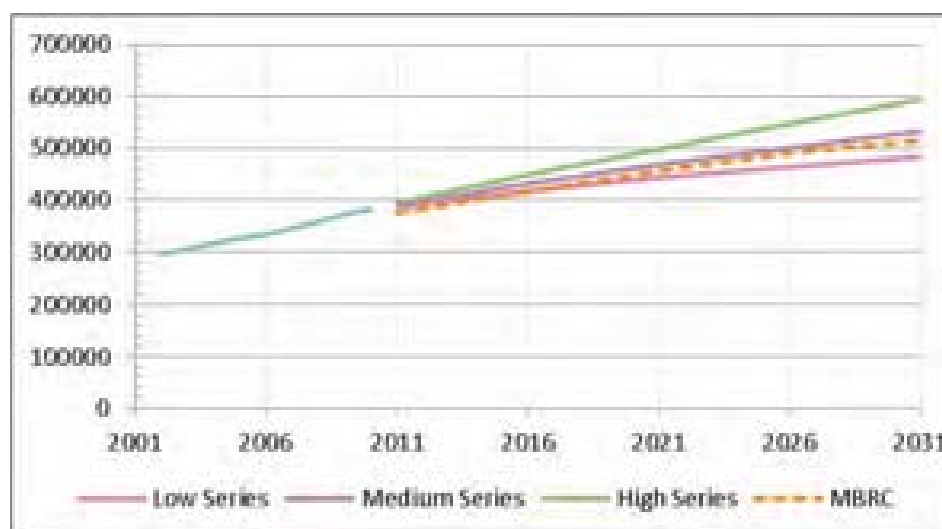
Population projections were provided by Moreton Bay Regional Council and are compared to the Office of Economic and Statistical Research (OESR) low, medium and high series projections in **Table 2** and **Figure 1** below.

Table 2: Population Projections, Moreton Bay Regional Council

Population at 30 June	OESR Low Series	OESR Medium Series	OESR High Series	MBRC Projections
2011	387,920	390,204	395,401	374,496
2016	417,210	430,729	448,668	415,667
2021	442,923	467,860	499,213	456,641
2026	464,745	501,488	547,253	490,922
2031	483,553	533,170	586,142	515,928

Source: OESR 2011a. Population and housing profile: Moreton Bay Regional Council (May 2011); Council Estimates, 2010.

Figure 1: Population Projections, Moreton Bay Regional Council



Source: OESR 2011a. Population and housing profile: Moreton Bay Regional Council (May 2011); Council Estimates, 2010.

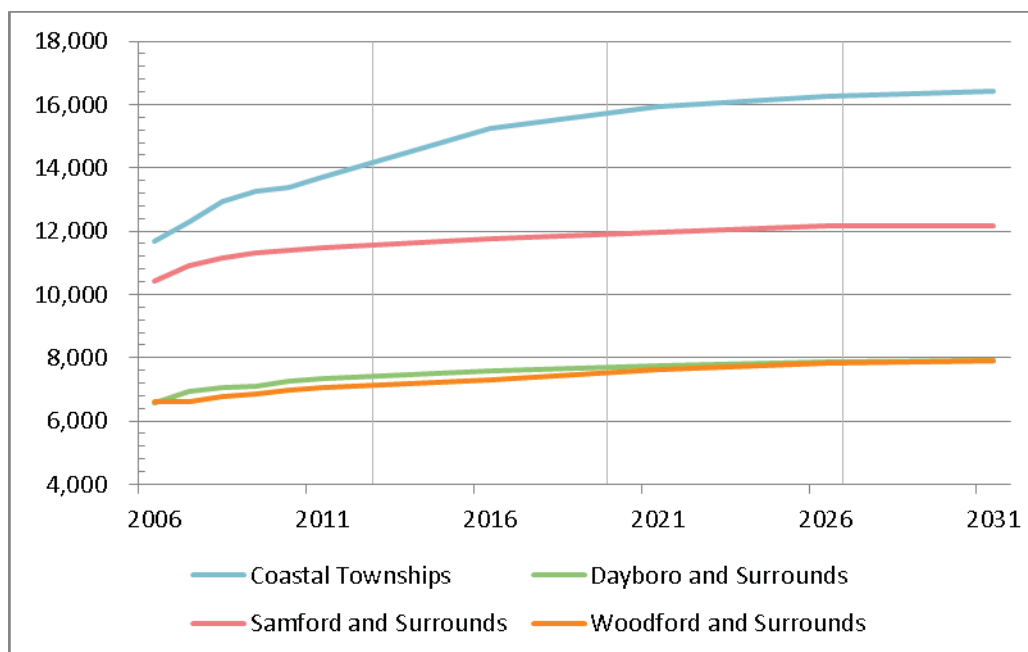
According to dwelling projections from OESR, approximately 74,750 additional dwelling will be required in the Moreton Bay Region between 2011 and 2031. This is a 50 per cent increase in the total number of dwellings over this time period.

1.2 Communities of Interest

Population projections for the four communities of interest (Dayboro and Surrounds, Samford and Surrounds, Woodford and Surrounds and Coastal Towns and Surrounds) are included below. These projections are based on the 2009 medium series population projections released by OESR with changes made by the Moreton Bay Regional Council.

Population projections are shown in **Figure 2** and **Table 3** below.

Figure 2: Population Projections, Communities of Interest



Source: Council Estimates, 2010.

Table 3: Population Projections, Communities of Interest

Area	2006	2011	2016	2021	2026	2031
Woodford and Surrounds	6,599	7,077	7,304	7,607	7,832	7,898
Samford and Surrounds	10,428	11,487	11,744	11,956	12,163	12,171
Coastal Townships	11,687	13,695	15,250	15,952	16,254	16,404
Dayboro and Surrounds	6,591	7,349	7,573	7,749	7,880	7,901

Source: Council Estimates, 2010.

2.0 DEMOGRAPHIC AND HOUSING CHARACTERISTICS

2.1 Moreton Bay Regional Council

Demographic Characteristics

Age

The Moreton Bay Region has a similar age distribution to Queensland (see **Figure 3**). The median age of residents in the region at 30 June 2010 was 36.6 years, compared to 36.2 years for Queensland (OESR 2011b).

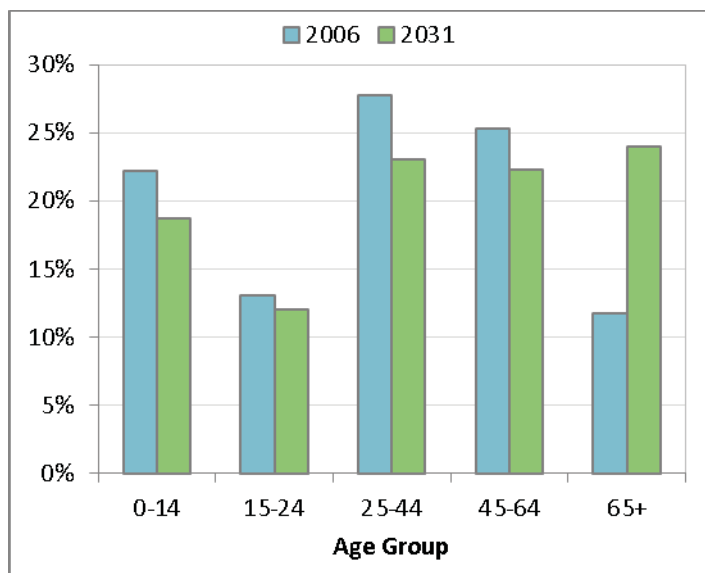
Figure 3: Age distribution, 30 June 2010 (preliminary estimate)

Age Group	Moreton Bay Region	Queensland
0-14	21.7%	20.0%
15-24	13.4%	14.3%
25-44	27.5%	28.3%
45-64	25.0%	24.8%
65+	12.4%	12.6%

Source: OESR 2011b. Regional Profile: Moreton Bay Regional Council (December 2011);

In 2031, the median age of the Moreton Bay Region population will reach 41.9 years, and the proportion of the population 65 years of age and older will increase to 24 per cent (OESR 2011a) (see **Figure 4**).

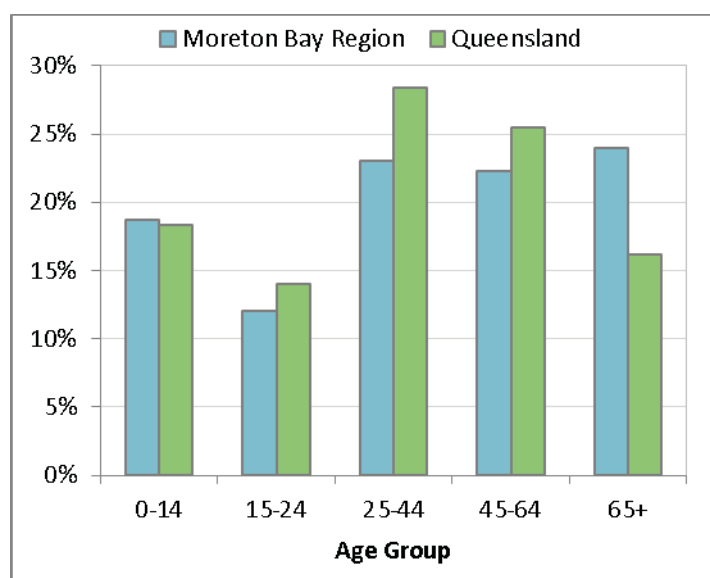
Figure 4: Projected age distribution, Moreton Bay Regional Council Area, 2006 and 2031



Source: OESR 2011a. Population and housing profile: Moreton Bay Regional Council (May 2011);

In 2031, around 16 per cent of the Queensland population will be in 65 years of age or older, a significantly lower proportion than for the Moreton Bay Region. The median age for the Moreton Bay Region will be 41.9 years, while the median age for the Queensland population will be 40.2 years (OESR 2011a).

Figure 5: Projected age distribution, Moreton Bay Regional Council area and Queensland, 2031



Source: OESR 2011a. Population and housing profile: Moreton Bay Regional Council (May 2011);

Ethnicity

At the 2006 Census, 5.2 per cent of the Moreton Bay Regional Council population were born overseas and categorised as being from non-English speaking backgrounds. In comparison, around 7.9 per cent of the Queensland population were born overseas in non-English speaking countries (OESR 2011b).

Aboriginal and Torres Strait Islander People

The Moreton Bay Region has a low proportion of Aboriginal and Torres Strait Islander people. In 2006, this group represented nearly 2 per cent of the population, compared to 3.3 per cent for Queensland (OESR 2011b).

Education

The proportion of the population who have completed year 12 (or equivalent) in the Moreton Bay Region (38.1%) is lower than that for the Brisbane Statistical Division (47.9%) and Queensland (41.3%).

The proportion of the population who have completed a Certificate qualification is higher in the Moreton Bay Region, at 19.7 per cent, compared with the Brisbane Statistical Division Queensland, however the proportion of the population with a Diploma, Bachelor or post-graduate qualification was lower than for the Brisbane Statistical District and mostly lower than for Queensland

Employment and Labour Force

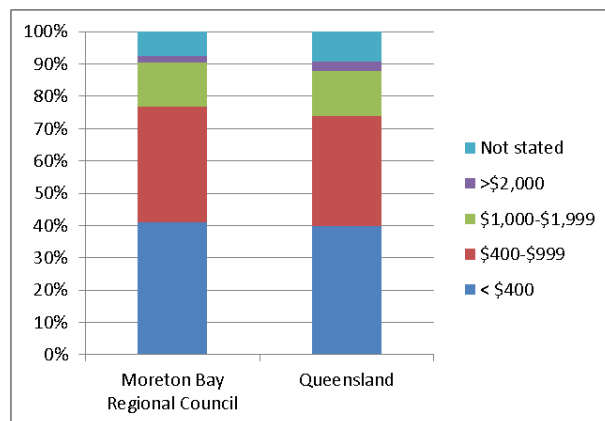
The unemployment rate at the September quarter 2011 was 5.0 per cent for the region, while the rate was 5.5 per cent for Queensland. The Moreton Bay Region has consistently recorded a lower unemployment rate than for Queensland over the past two years (Small Area Labour Force Data) (OESR 2011b).

The labour force participation rate in the Moreton Bay Region was comparable to the rates for the Brisbane Statistical Division and Queensland in 2006. The participation rate was 62.1 per cent in the region, compared to 64.2 per cent for the Brisbane Statistical Division and 61.8 per cent for Queensland.

Income

The population of the Moreton Bay Region has a similar income breakdown to Queensland. Around 41 per cent of the population over 15 years of age earn less than \$400 per week, compared to 40 per cent for Queensland.

Table 4: Gross individual weekly income, 2006



Source: OESR 2011b. Regional Profile: Moreton Bay Regional Council (December 2011);

Socio-Economic Disadvantage

Nearly 23 per cent of the Moreton Bay Regional Council population falls within the most disadvantaged quintile of the SEIFA Socio-Economic Index of Disadvantage¹ (OESR 2011b). This is a slightly higher proportion than would be expected (20%).

Vehicle Ownership

Vehicle ownership is relatively high in the Moreton Bay Region compared to Queensland, with 6.5 per cent of households not having access to a vehicle, compared to 7.9 per cent for Queensland.

¹ The Socio-Economic Indexes for Areas (SEIFA) Index of Relative Disadvantage measures the social and economic conditions of areas across Australia based on income, employment, education and other indicators. For this measure, exactly 20 per cent of the Queensland population is placed in each quintile based on their level of disadvantage. The lowest quintile is the most disadvantaged, while the highest quintile is the least disadvantaged. These quintiles are then applied to smaller geographic areas.

The proportion of households with access to only one vehicle is also lower than for Queensland at 34.6 per cent, compared to 36.5 per cent for Queensland.

In the region, 56.0 per cent of households have two or more vehicles, compared with 52.1 per cent for Queensland.

Assistance

In the Moreton Bay Region, 4.2 per cent of people require assistance with at least one core activity of self-care, mobility or communication. This was comparable to the proportion for the Brisbane Statistical District (3.7%) and Queensland (4.0%).

In the two weeks prior to the last Census, 10.5 per cent of the population over the age of 15 years provided unpaid assistance to someone with a disability. This was a slightly higher proportion than for the Brisbane Statistical District (9.6%) and Queensland (9.5%).

Internet Connection

Internet access in the Moreton Bay Region is similar to Queensland (see **Table 5**). In the region, 33 per cent of households have no internet connection, 23 per cent have dial-up and 41 per cent have broadband.

Table 5: Internet connection, 2006

Area	Moreton Bay Regional Council		Queensland
No internet connection	37,273	32.9%	34.2%
Broadband	46,784	41.2%	40.1%
Dial-up	25,911	22.8%	22.1%

Source: OESR 2011b. Regional Profile: Moreton Bay Regional Council (December 2011);

Housing Characteristics

Household Type

In the Moreton Bay Region, 36.7 per cent of households in the region were couple families with children, which was a high proportion compared with the Brisbane Statistical Division (33.7%) and Queensland (32.1%).

Couple families with children make up 29.5 per cent of households, one parent families make up 12.6 per cent of households and lone person households account for 19.4 per cent of households.

The proportion of lone person households was lower than that for the Brisbane Statistical Division, at 22.3 per cent, and Queensland, at 22.8 per cent.

Dwelling Structure

Separate houses are more popular in the Moreton Bay Region, with 87 per cent of all dwellings being separate houses, compared to 80 per cent for Queensland.

There is a lower proportion of attached dwellings, including flats, units and apartments, than for Queensland (OESR 2011b).

Table 6: Dwelling structure, 2006

Area	Moreton Bay Regional Council		Queensland
Separate House	99,139	87.4%	79.5%
Semi-detached, row or terrace house, townhouse	6,516	5.7%	4.6%
Flat, unit or apartment	6,368	5.6%	11.2%
Total	113,465	100%	100%

Source: OESR 2011b. Regional Profile: Moreton Bay Regional Council (December 2011); Total includes other dwelling types and type not stated.

Housing Costs

The median sale price of detached housing has grown strongly between 2003 and 2011 in the Moreton Bay region, at an average annual rate of 9.7 per cent (see **Table 7** below). The median sale price for units and townhouses has also grown strongly, increasing 8.9% each year on average between 2003 and 2004.

The price of dwellings (both new and existing) has decreased slightly between June 2010 and June 2011. The number of dwelling sales has also decreased from a high of 12,788 dwellings in the year to June 2007, to 6,730 dwellings in the year to June 2011. The recent decline in sales and value of dwelling prices may reflect caution from home owners during the GFC period (a decline in demand) rather than an oversupply of dwellings;

Table 7: Housing Sales, Moreton Bay Regional Council

Year to June	Median Sale Price – Detached Houses	Median Sale Price – Units and Townhouses
2003	\$190,000	\$166,500
2004	\$272,242	\$210,000
2005	\$292,500	\$237,000
2006	\$300,000	\$250,500
2007	\$327,500	\$261,000
2008	\$377,000	\$297,500
2009	\$379,025	\$310,000
2010	\$405,000	\$339,900
2011	\$399,000	\$328,750
Average Annual Growth Rate	9.7%	8.9%

Source: OESR 2011 - Residential land development activity profile – Moreton Bay Regional Council (June Quarter 2011)

The median price of vacant land has increased significantly between 2003 and 2011 (year ending 30 June) with an average annual growth rate of 11.5 per cent (see **Table 8** below). The number of sales of vacant land has declined from around 2,500 to 3,800 between 2006 and 2010, to around 1,500 vacant land sales in the year to June 2011(Preliminary Estimate).

Table 8: Vacant land sales, Moreton Bay Regional Council

Year to June	Number of lot sales (140 to 2,500sqm)	Median lot sale price (140 to 2,500sqm)
2003	3,990	\$84,900
2004	3,019	\$146,000
2005	2,020	\$167,000
2006	2,557	\$166,000
2007	3,736	\$170,000
2008	3,068	\$195,000
2009	2,514	\$205,000
2010	3,042	\$203,900
2011p	1,462	\$203,000
Average Annual Growth Rate	-	11.5%

Source: OESR 2011 - Residential land development activity profile – Moreton Bay Regional Council (June Quarter 2011)

The median rent for a two-bedroom dwelling was \$260, for a three-bedroom dwelling was \$310 and for a four-bedroom dwelling was \$350 per week in the Moreton Bay Region.

One-bedroom dwellings in the region had a median weekly rent of \$190.

Table 9: Median weekly rent, Moreton Bay Regional Council, June 2009

Number of Bedrooms	Median Weekly Rent
1 bedroom	\$190
2 bedrooms	\$260
3 bedrooms	\$310
4 bedrooms	\$350

Source: Department of Communities 2010. Housing Analysis.

Tenure Type

There is a relatively high proportion of homes being purchased in the Moreton Bay Region than in Queensland, and a lower proportion of homes are being rented (see **Table 10**) (OESR 2011b).

Table 10: Tenure type, 2006

Area	Moreton Bay Regional Council		Queensland
Fully Owned	34,935	30.8%	31.6%
Being purchased	45,483	40.1%	33.8%
Rented	29,561	26.1%	31.1%
Total	113,465	100%	100%

Source: OESR 2011b. Regional Profile: Moreton Bay Regional Council (December 2011); Total includes other tenure types and type not stated.

Rent by Landlord Type

Weekly Rent Range	Real estate agent		State housing authority		Person not in the same household		Other	
\$0-\$99	63	0%	1,843	47%	491	7%	625	29%
\$100-\$179	2,582	16%	1,399	35%	2,214	32%	778	36%
\$180-\$224	4,761	29%	408	10%	2,143	31%	315	14%
\$225-\$274	5,444	33%	29	1%	1,288	18%	203	9%
\$275-\$349	2,721	17%	9	0%	486	7%	53	2%
\$350 and over	641	4%	82	2%	187	3%	46	2%
Total	16,458	100%	3,942	100%	6,983	100%	2,177	100%

Residential Aged Care

In order to benchmark the level of provision of residential aged care facilities, an audit of facilities was undertaken for the Moreton Bay Regional Council area. As shown in **Table 11** below, a total of 1,431 low care places and 1,174 high care places were found in the Moreton Bay Regional Council area. At June 30 2011, the ratio of provision was therefore estimated to be 41 low care places and 34 high care places per 1,000 people aged 70 years or older. This was lower than the national target ratio provided by the Federal Government's Australian Institute of Health and Welfare of 44 low care places and 44 high care places per 1,000 people aged 70 years or older (AIHW 2011).

These rates of provision were used to estimate the number of places required in each of the communities of interest to 2031 in the following sections.

Table 11: Residential Aged Care Facilities, Moreton Bay Regional Council

Measure	Low Care Places	High Care Places
Total Places – Moreton Bay Regional Council	1,431	1,174
Population 70+ years – 30 June 2011	35,018	
Rate of Provision – Moreton Bay Regional Council <i>Number of places per 1,000 people 70 years of age and older</i>	41	34
Federal Target Ratio	44	44

2.2 Communities of Interest

2.2.1 Woodford and Surrounds

The Woodford and Surrounds study area had a population of 6,401 people in 2006 (ABS 2007). Woodford and D'Aguilar are the only urban centres within the study area (OESR 2011b), and together they had a population of 3,775 people in 2006 (ABS 2007), accounting for 59 per cent of the population. The remaining 41 per cent of the population live in rural areas (which don't have any apparent population centre).

Demographic Characteristics

Age

The Woodford and Surrounds study area has a high proportion of young people aged between 15 and 34 years (26.7%) compared to the other study areas – Dayboro and Surrounds (21.6%), Coastal Towns and Surrounds (18.8%) and Samford and Surrounds (19.5%). However, the proportion of young people (15 to 34 years of age) is comparable to the Moreton Bay Region (25.0%) and Queensland (27.2%).

Figure 6 below shows the age profile of the Woodford and Surrounds study area compared to the Moreton Bay Regional Council area. Unlike other study areas, this area has a large imbalance between the number of male and female residents. Overall, males make up 57 per cent of the total population and females 43 per cent. This imbalance is most pronounced for the population between the 20 and 54 years of age.

In 2006, there were 308 men and just 107 women aged between 20 and 24 years in the region. In the 15 to 19 years age group, the number of young men and women were similar.

Figure 6: Age Profile, Woodford and Surrounds (blue), Moreton Bay Regional Council (outline), 2006



Source: ABS, 2007 [Census Data].

The outflow of young people from rural areas in Australia has consistently been made up of a higher proportion of females than males over four decades (1960-2000) (Hugo 2005). This is generally due to a lack of employment and apprenticeship opportunities for women and a

culture that is seen to reinforce traditional gender roles (Mission Australia 2006). The lower proportion of women, especially between the ages of 20-54 years, may reflect this trend for young women to leave rural areas.

Ethnicity

A relatively low proportion of people in this study area are from non-English speaking backgrounds (2.5%) compared to Queensland (5.4%).

Aboriginal and Torres Strait Islander People

Relatively high proportion of Aboriginal and Torres Strait Islander People (4.0%) compared to the Moreton Bay Region (1.8%) and Queensland (3.3%).

Education

One quarter of the population older than 15 years of age had finished year 12 (or equivalent) in 2006¹. This was a low proportion compared with the southern study areas (Dayboro and Surrounds and Samford and Surrounds) and lower than the proportion for Queensland (41%).

Around 16 per cent of the population over 15 years of age had achieved a certificate qualification, while 4 per cent had achieved a bachelor degree. In comparison, 18 per cent of the Queensland population had a certificate, and 10 per cent had achieved a bachelor degree.

Overall, this study area had a low level of educational attainment compared with the southern study areas, and Queensland.

Employment and Labour Force

The Woodford and Surrounds study area had a comparable unemployment rate (4.1%) to Queensland (4.8%) in 2006. The study area also had a relatively low labour force participation rate (50%) compared with the southern study areas (around 70%) and Queensland (62%).

Income

Median individual income in 2006 was \$400 per week, median family income was \$1,031 per week and median household income was \$895 per week for this study area. These figures were a slightly lower than for Queensland, but were comparable to the Coastal Towns and Surrounds study area.

Socio-economic disadvantage

One Census Collection District (CD)² in the Woodford and Surrounds study area was in the lowest quintile of Queensland CDs according to the SEIFA Socio-Economic Index of Disadvantage (ABS 2008). This CD is located in Woodford.

¹ Although this unemployment and workforce data is now significantly out of date, it remains the best data available for our communities of interest. The unemployment rate and workforce participation rates are relevant when making comparisons with data from other areas recorded at the same time and shouldn't be used alone.

² The Census Collection District (CD) is the second smallest geographic area defined in the Australian Standard Geographical Classification (ASGC), the smallest being the Mesh Block.

Vehicle Ownership

Approximately 64 per cent of households have access to two or more vehicles, 30 per cent have one vehicle and 3 per cent have no vehicle.

The proportion of households with two or more vehicles is high compared to Queensland, and the number with one or no vehicle was lower than compared to Queensland. Compared to the other study areas, access to a vehicle was relatively low.

Assistance

A slightly lower proportion of the population require assistance than in Queensland. In the Woodford and Surrounds study area, 3.1 per cent of the population require assistance with at least one core activity of self-care, mobility or communication, compared with 4.2 per cent for the Moreton Bay Regional Council Area, 4.0 per cent for Queensland.

Internet Connection

In the Woodford and Surrounds study area, 37 per cent of households have no internet connection, 30 per cent have dial-up internet and 30 per cent have a broadband connection. The level of internet access is low in the study area compared to the Moreton Bay Region, Brisbane Statistical Division and Queensland.

Housing Characteristics

Dwelling Structure

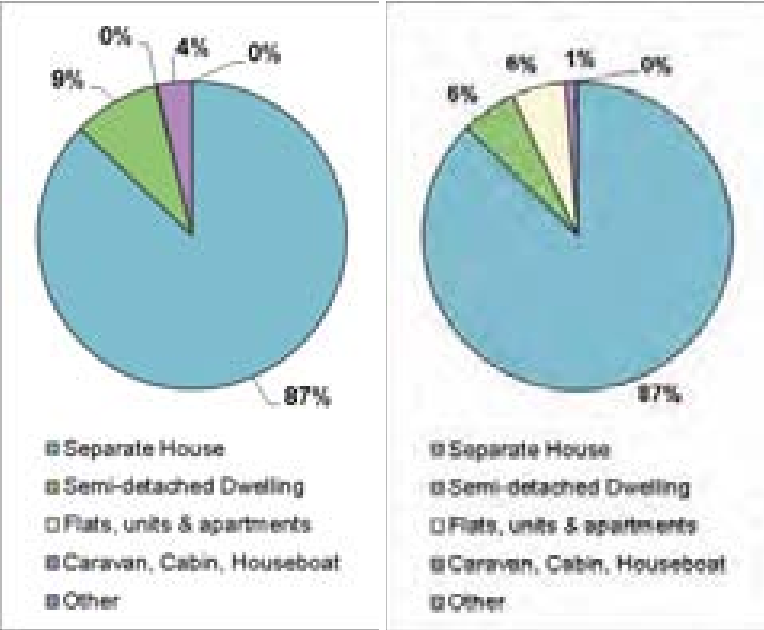
Detached houses account for 87 per cent of all occupied dwellings in the study area (see **Figure 7**). This is a significantly lower proportion than the Dayboro and Surrounds and Samford and Surrounds study areas, where over 98 per cent of dwellings are detached. This proportion is still high compared to Queensland where 80 per cent of homes are detached.

Around 9 per cent of all dwellings in this study area are semi-detached, a significantly high proportion compared to the other study areas, and higher than the proportion for the Moreton Bay Region (5.7%) and Queensland (7.6%).

A relatively high proportion of households are living in caravans, cabins, or houseboats (3.7%). This proportion is similar to the Coastal Towns and Surrounds study area (4.4%).

The CD has been designed for use in the Census of Population and Housing as the smallest unit for collection and processing.

Figure 7: Dwelling structure, Woodford and Surrounds (left), and Moreton Bay Regional Council area (right), 2006



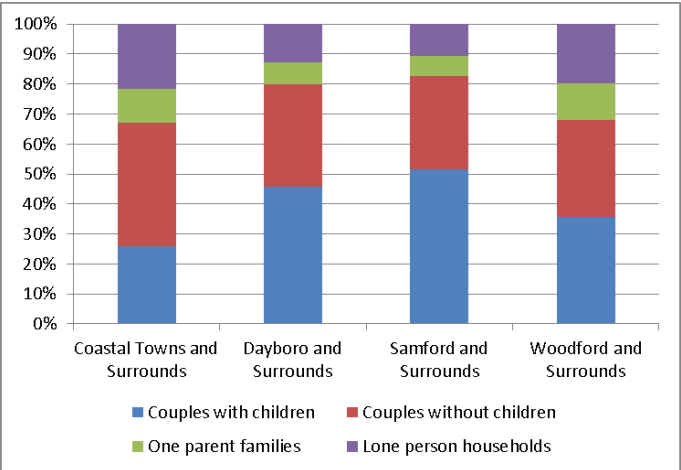
Source: ABS, 2007 [Census Data].

Household Type

Of all households in the area, 36 per cent are couple families with children, 33 per cent are couple families without children, 12 per cent are one parent families and 20 per cent are lone person households.

This household structure is different to the other study areas (see **Figure 8**), but similar to Queensland. In comparison to Queensland, this study area has a lower proportion of lone person households and higher proportion of couple families with children.

Figure 8: Household Type, Study Areas, 2006



Source: ABS, 2007 [Census Data].

Rent and Housing Loan Repayments

This study area had a relatively low median weekly rent (\$182) compared to the other study areas, the Brisbane Statistical Division (\$220) and Queensland (\$200).

The median monthly housing loan repayment in 2006 was \$1,100 which was relatively low compared to the other study areas and the Brisbane Statistical Division and Queensland (both at \$1,300 per month).

Tenure Type

Of occupied private dwellings in the area, 35 per cent are fully owned, 41 per cent are being purchased, and 20 per cent are being rented.

Compared to the Moreton Bay Regional Council area, the Woodford and Surrounds study area has a higher proportion of dwellings which are fully owned, and a lower proportion of houses being rented. In the Moreton Bay Regional Council area, 31 per cent are fully owned, 40 per cent are being purchased and 26 per cent are rented.

Of households renting, 41 per cent are renting from a real estate agent, 42 per cent are renting from a person not in the same household and no households are renting from a state housing authority.

Rent by Landlord Type

Table 12: Rent by landlord type, Woodford and Surrounds, 2006

Weekly Rent	<i>Real estate agent</i>		<i>State housing authority</i>		<i>Person not in the same household</i>		<i>Other</i>	
\$0-\$99	0	0%	0	0%	24	14%	29	63%
\$100-\$179	38	25%	0	0%	68	41%	14	30%
\$180-\$224	64	42%	0	0%	48	29%	0	0%
\$225-\$274	30	20%	0	0%	14	8%	0	0%
\$275-\$349	17	11%	0	0%	6	4%	0	0%
\$350 and over	0	0%	0	0%	7	4%	3	7%
Total	152	100%	0	100%	167	100%	46	100%

Residential Aged Care

There were no residential aged care facilities located in the Woodford and Surrounds study area in 2011. According to benchmarking undertaken for this project, there is a current need for 18 low care beds and 15 high care beds in this study area in order to achieve the current level of provision provided throughout the Moreton Bay Regional Council area, and 19 low care beds and 19 high care beds to meet the national target.

By 2031, 42-45 low care beds and 35-45 high care beds are estimated to be required. Given the average number of beds per facility in the Moreton Bay Region, this demand could be satisfied with one low care facility and one high care facility, which could be collocated.

Table 13: Required Residential Aged Care, Woodford and Surrounds¹

Year	Population 70+ years	Required to Meet Current MBRC Provision		Required to Meet Federal Target	
		Low Care Beds	High Care Beds	Low Care Beds	High Care Beds
2011	436	18	15	19	19
2016	562	23	19	25	25
2021	735	30	25	32	32
2026	884	36	30	39	39
2031	1,016	42	35	45	45

Source: Buckley Vann Town Planning Consultants

Summary

- Similar age profile to Queensland, however a significant imbalance exists between the number of men and women in the region. This imbalance is most pronounced for people between 20 and 54 years;
- Relatively high number of Aboriginal and Torres Strait Islander people;
- Relatively low educational attainments;
- Similar income levels to the other northern study area, Coastal Towns and Surrounds, but lower than for the southern study areas, and slightly lower compared to Queensland;
- One quite disadvantaged small area in Woodford;
- Relatively low vehicle access compared to the other study areas, but relatively high compared to Queensland;
- Significantly lower proportion of detached houses compared to the southern study areas;
- Relatively low housing costs;
- There are currently no aged care facilities in this study area. By 2031, 42-45 low care beds and 35-45 high care beds are forecast to be required;
- **Comment:** Seems to be quite a regular, balanced area except for the imbalance of men and women.

¹ Targets represent an absolute minimum level of provision in order to maintain the same level of service.

2.2.2 Dayboro and Surrounds

The Dayboro and Surrounds study area had a population of 6,426 people in 2006 (ABS 2007). At this time, Dayboro was the only urban centre or locality within the study area (OESR 2011b), and had a population of 879 people (ABS 2007). The remaining 86 per cent of the population live in rural area without any apparent centre.

Demographic Characteristics

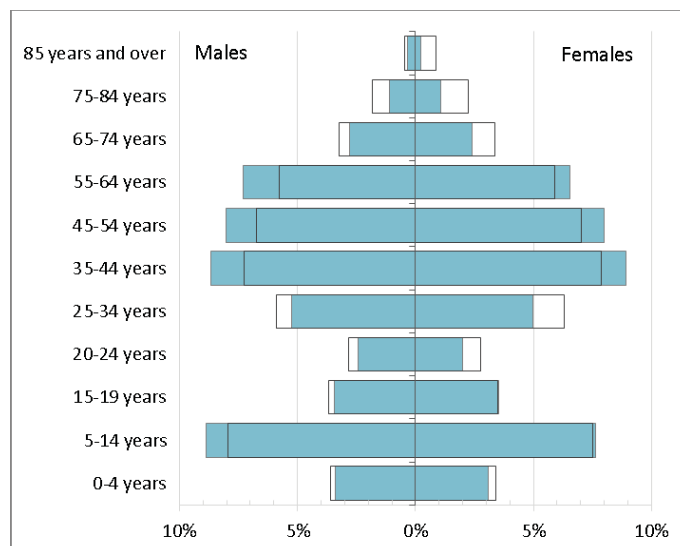
Age

Compared to the Moreton Bay Regional Council Area, Dayboro and Surrounds has a higher proportion of people aged between 35 and 64 years and a slightly lower proportion of people aged 20-34 years.

Dayboro also has a low proportion of people over 65 years of age compared to the Moreton Bay Regional Council area (8%, compared to 12% for the LGA).

The median age is 38.0 years, slightly older than for the region at 36.4 years.

Figure 9: Age profile, Dayboro and Surrounds (blue), Moreton Bay Regional Council (outline), 2006



Source: ABS, 2007 [Census Data].

Ethnicity

A relatively low proportion of people in this study area are from NESB backgrounds (2.4%) compared to Queensland (5.4%).

Aboriginal and Torres Strait Islander People

The Dayboro and Surrounds study area has a relatively low proportion of Aboriginal and Torres Strait Islander People (1.2%) compared to the Moreton Bay Region (1.8%) and Queensland (3.3%).

Education

Approximately 43 per cent of the population over the age of 15 have completed year 12 or equivalent, compared to 58 per cent for Samford and Surrounds, and around 26 per cent for

both Coastal Towns and Surrounds and Woodford and Surrounds. Approximately 11 per cent of the population had achieved a bachelor as their highest level of schooling, compared to 18.5 per cent for Samford and Surrounds and around 4.5 for both Coastal Towns and Surrounds and Woodford and Surrounds.

Employment and Labour Force

In 2006, the unemployment rate for this study area was 2.7 per cent which was low compared with the northern study areas, the Brisbane Statistical District (4.4%) and Queensland (4.8%).

The labour force participation rate at this time was 71 per cent which was high compared with the northern study areas, the Brisbane Statistical District (64%) and Queensland (62%).

Income

The median individual income for the Dayboro and Surrounds study area was \$550 which was relatively high compared with the northern study areas (\$360 and \$400), the Brisbane Statistical Division (\$516) and Queensland (\$476).

The median family income (\$1,367) and median household income (\$1,300) in this study area were also relatively high.

Socio-economic disadvantage

No Census Collection Districts were in the bottom quintile of Queensland or Australia, suggesting that the Dayboro and Surrounds study area is not disadvantaged (ABS 2008).

Vehicle Ownership

A high proportion of households have access to two or more vehicles (78%), which is a high proportion compared with the northern study areas, Brisbane Statistical District (52%) and Queensland (52%).

Assistance

A low proportion of the population need assistance, at 2.5 per cent, compared with 4.2 per cent for the Moreton Bay Regional Council Area, and 4.0 per cent for Queensland.

Almost 12 per cent of the population over 15 years of age provided assistance to someone with a disability in the two weeks prior to the Census collection night. This was slightly higher than the proportion for the Brisbane Statistical Division (9.6%) and Queensland (9.5%).

Internet Connection

Nearly 40 per of households in the area have dial-up internet connection, the highest proportion of any study area, and significantly higher than the rate for the Moreton Bay Region (23%) and Queensland (22%). Compared to Queensland, a low proportion of the population have no internet connection and a low proportion have broadband. These proportions suggest that in some areas of the region, broadband internet may not be available, or take up is low for some other reason.

Housing Characteristics

Dwelling Structure

A significant proportion of dwellings are separate houses (99%), which is a high proportion compared to the northern study areas, the Brisbane Statistical District and Queensland (both 80%);

Household Type

Couple families with children account for 46 per cent of all households in the area, while couple families without children account for 35 per cent. These proportions are high compared with the Brisbane Statistical Region (34% and 27% respectively) and Queensland (32% and 29% respectively).

The proportion of lone person households was 13 per cent compared with 22 per cent for the Brisbane Statistical District and 23 per cent for Queensland. This proportion was also low compared with the northern study areas, but slightly higher than for the Samford and Surrounds study area.

This study area has a relatively high average household size (2.9 people) compared with the northern study areas (2.5 and 2.7 people) and Queensland (2.6 people).

Rent and Housing Loan Repayments

The median weekly rent at the time of the 2006 Census was \$212 and the median monthly housing loan repayment was \$1,431. These amounts were similar to the amounts averages for the Brisbane Statistical Division (\$220 and \$1,300) and Queensland (\$200 and \$1,300).

Tenure Type

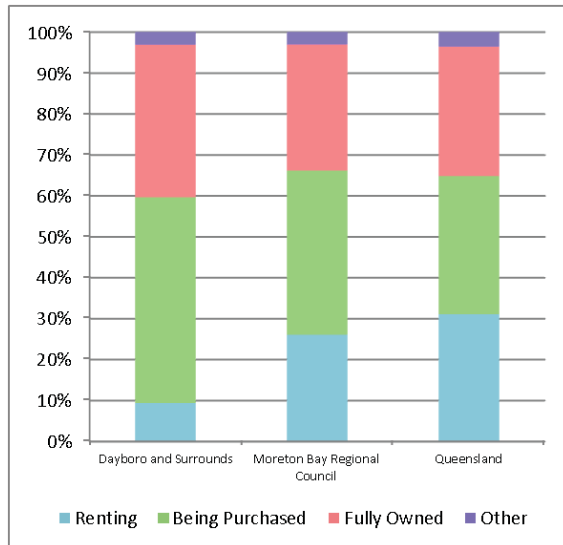
Half of all dwellings in the study area are being purchased (see **Figure 10**). This was a high proportion compared to the northern study areas, the Moreton Bay Region (40%), and Queensland (34%) but comparable to Samford and Surrounds (52%).

A high proportion of homes are fully owned (37%) compared with the Moreton Bay Region (31%) and Queensland (32%).

A low proportion of dwellings are being rented (9%) compared with Moreton Bay Region (26%) and Queensland (31%).

Of households renting in the Dayboro and Surrounds study area, 43 per cent are renting from a real estate agent, 46 per cent are renting from a person not in the same household and no households are renting from a state housing authority.

Figure 10: Tenure type, Dayboro and Surrounds, 2006



Source: ABS, 2007 [Census Data].

Rent by Landlord Type

Table 14: Rent by landlord type, Dayboro and Surrounds, 2006

Weekly Rent	Real estate agent		State housing authority		Person not in the same household		Other	
\$0-\$99	6	7%	0	0%	7	8%	16	100%
\$100-\$179	12	13%	0	0%	22	26%	0	0%
\$180-\$224	24	27%	0	0%	16	19%	0	0%
\$225-\$274	20	22%	0	0%	15	18%	0	0%
\$275-\$349	15	17%	0	0%	7	8%	0	0%
\$350 and over	10	11%	0	0%	12	14%	0	0%
Total	90	100%	0	100%	84	100%	16	100%

Residential Aged Care

There were no residential aged care facilities located in the Dayboro and Surrounds study area in 2011. According to benchmarking undertaken for this project, there is a current need for 14 low care beds and 12 high care beds in this study area in order to achieve the level of provision provided throughout the Moreton Bay Regional Council area, and 15 low care beds and 15 high care beds to meet the national target.

By 2031, 33-35 low care beds and 27-35 high care beds are estimated to be required. Given the average number of beds per facility in the Moreton Bay Region, this demand could be satisfied with one low care facility and one high care facility, which could be collocated.

Table 15: Required Residential Aged Care, Dayboro and Surrounds ¹

Year	Population 70+ years	Required to Meet Current MBRC Provision		Required to Meet Federal Target	
		Low Care Beds	High Care Beds	Low Care Beds	High Care Beds
2011	351	14	12	15	15
2016	457	19	16	20	20
2021	591	24	20	26	26
2026	702	29	24	31	31
2031	799	33	27	35	35

Source: Buckley Vann Town Planning Consultants

Summary

- Quite a dispersed population, with 86 per cent of the population living in rural areas without an apparent centre;
- Higher proportion of people aged between 35 and 64 years, but lower proportion of the population over 65 years compared to the Moreton Bay Region;
- High educational attainment compared to the northern study areas, but lower than Samford and Surrounds;
- High proportions of couple families with children and couple families without children, and low proportions of one parent families and lone person households;
- High proportion of workers;
- High dependency on cars for transport;
- Relatively high median incomes but well below the Samford and Surrounds study area;
- Significant number of households with mortgages, low proportion renting;
- There are currently no aged care facilities in this study area. By 2031, 33-35 low care beds and 27-35 high care beds are forecast to be required;
- **Comment:** Availability of services, including aged care and broadband access, should be investigated. The lack of older people, and high dial-up internet access, may suggest that these services are not readily accessible. Given the dispersed population, the provision of these services may be difficult.

¹ Targets represent an absolute minimum level of provision in order to maintain the same level of service.

2.2.3 Samford and Surrounds

The Samford and Surrounds study area had a population of 10,140 people in 2006 (ABS 2007). Samford, Mount Nebo and Mount Glorious are localities within the region (OESR 2011b) and together account for 1,254 people, or 12 per cent of the population (ABS 2007). The remaining population live in rural areas without centres.

Demographic Characteristics

Age

Compared to the other study areas, Samford and Surrounds has a higher proportion of younger people, with 25 per cent of the population being under the age of 15 years.

Around 18 per cent of the population is aged between 5 and 14 years of age, compared to 16 per cent for the Moreton Bay Regional Council Area, 14 per cent for the Brisbane Statistical Division and 14 per cent for Queensland.

This study area also has a high proportion of people aged between 35 and 54 years of age, with this group making up 36 per cent of the population, compared to 29 per cent for both the Moreton Bay Region and Queensland.

Just 8 per cent of the population is between 25 and 34 years, compared to 12 per cent for the Moreton Bay Region, and 13 per cent for Queensland.

Lowest proportion of people over 65 years at 6.4%, compared with 12% for the Moreton Bay Region and Queensland.

Median age is 37.8 years which is slightly older than the median age for the Moreton Bay Region (36.4 years) and Queensland (36 years).

Figure 11: Age profile, Samford and Surrounds (blue), Moreton Bay Regional Council (outline), 2006



Source: ABS, 2007 [Census Data].

Ethnicity

A relatively low proportion of people in this study area are from non-English speaking background (3.4%) compared to Queensland (5.4%).

Aboriginal and Torres Strait Islander People

Relatively low proportion of Aboriginal and Torres Strait Islander People (0.7%) compared to the Moreton Bay Region (1.8%) and Queensland (3.3%).

Education

A total of 58 per cent of the population have completed year 12 (or equivalent) which is a very high proportion compared with the other study areas, and higher than the proportion for Queensland (41%).

This study area also has high tertiary educational attainment compared to the other study areas, except for Certificate qualifications. Approximately 10 per cent of the population have a diploma or advanced diploma, 19 per cent have a bachelor degree, and 8 per cent have a post-graduate qualification. These were high proportions compared with the other study areas, and Queensland (7%, 10% and 3% respectively).

Employment and Labour Force

The study area has a relatively low unemployment rate of 2.8 per cent in 2006, compared with the northern study areas, and Queensland (4.8%). The area has a relatively high labour force participation rate (72%) compared with the northern study areas and Queensland (62%).

Income

The median individual income in this study area was \$629 per week, family income was \$1,746 per week and household income was \$1,670 per week. These were significantly higher median incomes than other study areas as well as the Brisbane Statistical Division and Queensland.

Two-thirds of all households in this study area have an average weekly income of more than \$1,000 per week.

Socio-economic disadvantage

All Census Collection Districts in this area score highly in the 2006 SEIFA Socio-economic Index of Disadvantage - meaning they are not disadvantaged relative to other districts in Queensland and Australia (ABS 2008).

Vehicle Ownership

Almost 80 per cent of households have access to two or more vehicles. In comparison, in Queensland 52 per cent of households have two or more vehicles. Just one per cent of households have no vehicle.

Assistance

A low proportion of the population require assistance, at 1.6 per cent, compared with 4.2 per cent for the Moreton Bay Regional Council Area and 4.0 per cent for Queensland.

Internet Connection

A high proportion of households in this study area have access to broadband internet, at 55 per cent. In comparison, 41 per cent of households have broadband in the Moreton Bay Region, and 40 per cent in Queensland.

Only 14 per cent of households have no internet connection, compared with 33 per cent in the Moreton Bay Region and 34 per cent in Queensland.

Housing Characteristics

Dwelling Structure

High proportion of separate houses, at 98 per cent, compared with 80 per cent for Queensland.

Household Type

A high proportion of households in this study area are couples with children (51%), compared to Queensland (32%). This proportion was also high compared with the other study areas.

One parent families represent 7 per cent of all households in the area and lone person households represent 11 per cent. These proportions were low compared to Queensland, at 12 per cent and 23 per cent respectively.

The average household size in the study area is 3.1 people, which is high compared with the other study areas and Queensland (2.6 people).

Rent and Housing Loan Repayments

Housing costs were the highest of any study area, and high compared with the Brisbane Statistical Region and Queensland.

Median weekly rent in 2006 was \$238 compared with \$220 for the Brisbane Statistical District and \$200 for Queensland.

The median monthly housing loan repayment in 2006 was \$1,674, compared with \$1,300 for both the Brisbane Statistical District and for Queensland.

Tenure Type

More than half of all dwellings in the study area are being purchased (52%). This was a high proportion compared to the northern study areas, the Moreton Bay Region (40%), and Queensland (34%), but comparable to Dayboro and Surrounds (50%).

A high proportion of homes are fully owned (36%) compared with the Moreton Bay Region (31%) and Queensland (32%).

A very low proportion of dwellings are being rented (10%), compared with the Moreton Bay Region (26%) and Queensland (31%).

Of households renting, 34 per cent are renting from a real estate agent, 58 per cent are renting from a person not in the same household and no households are renting from a state housing authority.

Rent by Landlord Type

Table 16: Rent by landlord type, Samford and Surrounds, 2006

Weekly Rent	Real estate agent		State housing authority		Person not in the same household		Other	
\$0-\$99	0	0%	0	0%	27	14%	18	62%
\$100-\$179	6	5%	0	0%	49	26%	7	24%
\$180-\$224	15	13%	0	0%	32	17%	0	0%
\$225-\$274	13	12%	0	0%	25	13%	0	0%
\$275-\$349	23	20%	0	0%	29	16%	4	14%
\$350 and over	56	50%	0	0%	22	12%	0	0%
Total	113	100%	0	100%	187	100%	29	100%

Residential Aged Care

There were no residential aged care facilities located in the Samford and Surrounds study area in 2011. According to benchmarking undertaken for this project, there is a current need for 19 low care beds and 16 high care beds in this study area in order to achieve the level of provision provided throughout the Moreton Bay Regional Council area, and 21 low care beds and 21 high care beds to meet the national target.

By 2031, 43-46 low care beds and 35-46 high care beds are estimated to be required. Given the average number of beds per facility in the Moreton Bay Region, this demand could be satisfied by one low care facility and one high care facility, which could be collocated.

Table 17: Required Residential Aged Care, Samford and Surrounds¹

Year	Population 70+ years	Required to Meet Current MBRC Provision		Required to Meet Federal Target	
		Low Care Beds	High Care Beds	Low Care Beds	High Care Beds
2011	470	19	16	21	21
2016	610	25	21	27	27
2021	789	32	27	35	35
2026	922	38	31	41	41
2031	1,039	43	35	46	46

Source: Buckley Vann Town Planning Consultants

¹ Targets represent an absolute minimum level of provision in order to maintain the same level of service.

Summary

- The population of the Samford and Surrounds study area is quite dispersed, with around 88 per cent of the population living in rural areas without a discernible centre;
- There are large proportions of people who are in the 5 to 14 years and 35 to 54 years age groups;
- There is a high proportion of couple families with children in the area;
- A high proportion of workers live in the region, and median incomes are relatively high – including both individual income and household income;
- High car dependency for transport;
- Significant proportion of households have a mortgage;
- There are currently no aged care facilities in this study area. By 2031, 43-46 low care beds and 35-46 high care beds are forecast to be required;
- **Comment:** Even though the Samford and Surrounds study area has a dispersed population and a low proportion of older people (65 years and older) (similar to Dayboro and Surrounds), the age structure suggests that there are particularly high proportions of people in specific age groups. Rather than older people moving out of the region at a particular age, this may suggest that there are a large number of families living in the region which reduces the proportion of other age groups, including younger people and older people.

2.2.4 Coastal Towns and Surrounds

The Coastal Towns and Surrounds study area is the largest community of interest, with a population of 11,432 people in 2006.

Sandstone Point, Beachmere, Ningi, Toorbul, Donnybrook and Godwin Beach are urban centres/ localities located within the area (OESR 2011b). Just less than 73 per cent of the total population in this area is located in these six urban centres.

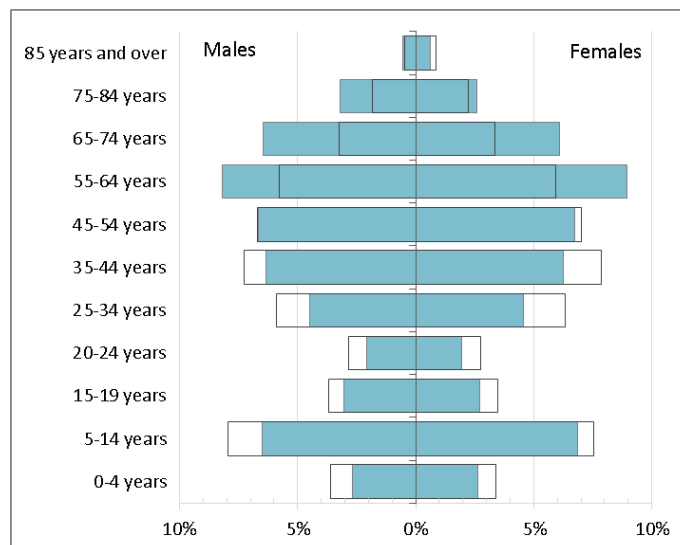
Demographic Characteristics

Age

Compared to the other study areas, and the whole Moreton Bay Region, this community has a large proportion of older people, with people 55 years of age and older representing 36.6 per cent of the population. In comparison, this group makes up 23.7 per cent of the Moreton Bay Region population. The Coastal Towns and Surrounds study area also has a lower proportion of people aged between 35 and 54 years, compared to other areas. The age profile of this study area compared to the Moreton Bay Region is shown in **Figure 12** below.

The median age of this study area was 45.2 years in 2006, which is high compared to the other study areas, the Moreton Bay Region (36.4 years) and Queensland (36.0 years).

Figure 12: Age profile, Coastal Towns and Surrounds (blue), Moreton Bay Regional Council (outline), 2006



Source: ABS, 2007 [Census Data].

Ethnicity

A relatively low proportion of people in this study area are from non-English speaking backgrounds (3.4%) compared to Queensland (5.4%).

Aboriginal and Torres Strait Islander People

Relatively low proportion of Aboriginal and Torres Strait Islander People (2.2%) compared to Queensland (3.3%), similar proportion to the Moreton Bay Region (1.8%).

Education

Approximately 27 per cent of the population has completed year 12 (or equivalent) and 21 per cent have a Certificate qualification.

A relatively low level of educational attainment compared with the southern study areas, and Queensland, but a relatively high proportion of Certificate qualifications. Approximately 18 per cent of the Queensland population had a Certificate qualification in 2006.

Employment and Labour Force

The Coastal Towns and Surrounds study area had a high unemployment rate of 6.5 per cent at the 2006 Census, which was significantly higher than other study areas. At this time, Queensland had an unemployment rate of 4.8 per cent.

The labour force participation rate was 48.2 per cent in 2006 and was significantly lower than the rate for Dayboro and Surrounds (71%) and Samford and Surrounds (72%) study areas. In comparison, Queensland had a participation rate of 61.8 per cent in 2006.

Income

Median weekly individual income (\$360), family income (\$874), and household income (\$723) were lower in this study area than in other study areas, as well as the Brisbane Statistical Division and Queensland. In 2006, the Queensland median weekly individual income was \$476, the median weekly family income was \$1,154 and the median weekly household income was \$1,033.

Over one-quarter of households in the Coastal Towns and Surrounds study area earned less than \$500 per week.

Around 55 per cent of households earned less than \$1,000 per week. In comparison, 38 per cent of households in the Brisbane Statistical Division and 42 per cent of households in Queensland earned less than this amount per week.

Socio-economic disadvantage

According to the SEIFA Socio-economic Index of Disadvantage, this study area is the most disadvantaged with six of the twenty Census Collection Districts (CD) that make up the study area being in the most disadvantaged quintile of the State.

An area which encompasses part of Beachmere, in the south of the study area, is the most disadvantaged (Collection District: 3120606) and is placed in the bottom 11 per cent of CDs in Queensland and 13 per cent of CDs in Australian. The other five CDs are located in Donnybrook, Toorbul and north and west of Sandstone Point (including Ningi and Godwin Beach, but not including Sandstone Point) (ABS 2008).

Vehicle Ownership

Vehicle access is low compared with other study areas. Around 4.6 per cent of households have no car which is high compared to other study areas, but low compared to the Brisbane Statistical Division (8.7%) and Queensland (7.9%).

Approximately 52 per cent of households have two or more vehicles, which is comparable to Queensland as a whole (52.1%), but substantially lower than other study areas (ranging from 64% to 79%).

Need for Assistance

Around 5 per cent of the population require assistance with at least one core activity of self-care, mobility or communication. This was a high proportion of people requiring assistance compared with the Moreton Bay Region (4.2%), the Brisbane Statistical Division (3.7%) and Queensland (4.0%). This proportion was also significantly higher than in the other study areas where the proportion of the population requiring assistance ranged between 1.6% and 3.1%.

Of those less than 75 years of age, 4.3 per cent required assistance in the twelve months before the Census.

The proportion of the population over the age of 15 years who have provided unpaid assistance to a person with a disability at least once in the two weeks prior to the Census was relatively consistent throughout the region, and was comparable to the proportion for Queensland.

Internet Connection

In the Coastal Towns and Surrounds study area, 41 per cent of households have no internet connection, 27 per cent have dial-up internet and 29 per cent have a broadband connection. The level of internet access is low in the study area compared to the Moreton Bay Region, Brisbane Statistical Division and Queensland. Access to the internet and types of connections are similar to the Woodford and Surrounds study area, but significantly less than the southern study areas of Dayboro and Surrounds, and Samford and Surrounds.

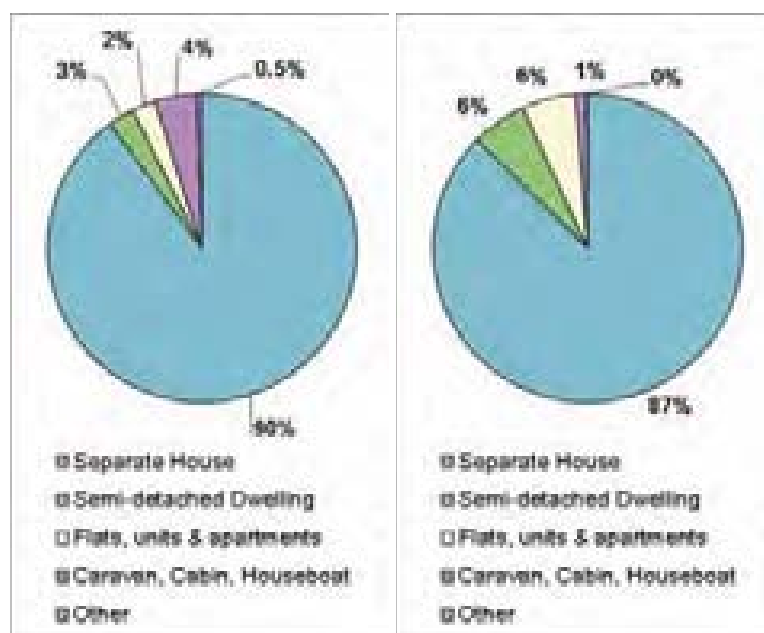
Housing Characteristics

Dwelling Structure

Detached houses account for 90 per cent of all occupied dwellings in the study area, this is a relatively low proportion compared to the Dayboro and Surrounds and Samford and Surrounds study areas where over 98 per cent of dwellings are detached. This proportion is however high compared to the Moreton Bay Region where 87 per cent of homes are detached and Queensland, at 80 per cent (see **Figure 13**).

Around 4.4 per cent of all dwellings in this study area are caravans, cabins or houseboats, and this was a significantly high proportion compared to the southern study areas, the Brisbane Statistical Division (0.7%) and Queensland (1.2%).

Figure 13: Dwelling structure, Coastal Townships and Surrounds (left), and Moreton Bay Regional Council area (right), 2006



Source: ABS, 2007 [Census Data].

Household Type

Approximately 40 per cent of households in the area are couple families without children which is a high proportion compared to the other study areas, and Queensland (29%).

A high proportion of households are lone person households (21%) compared to the southern study areas (13% Dayboro and Surrounds, 11% Samford and Surrounds) but similar to Woodford and Surrounds (20%) and Queensland (23%).

Twenty-five per cent of households are couples with children which is a low proportion compared to the other study areas and Queensland.

The average household size is 2.5 people which is the lowest average household size of any study area, and slightly lower than the Brisbane Statistical District and Queensland (both 2.6 people).

Rent and Housing Loan Repayments

The median weekly rent, at \$207 per week, is comparable to Queensland (\$200 per week), lower than the Samford and Surrounds study area (\$238) but higher than the Woodford and Surrounds study area (\$182).

The median monthly housing loan repayments (\$1,172) is compared to the southern study areas (Samford and Surrounds \$1,674 and Dayboro and Surrounds \$1,431), and Queensland (\$1,300).

Tenure Type

A high proportion of dwellings in the study area are fully owned (42%) compared to Queensland (32%).

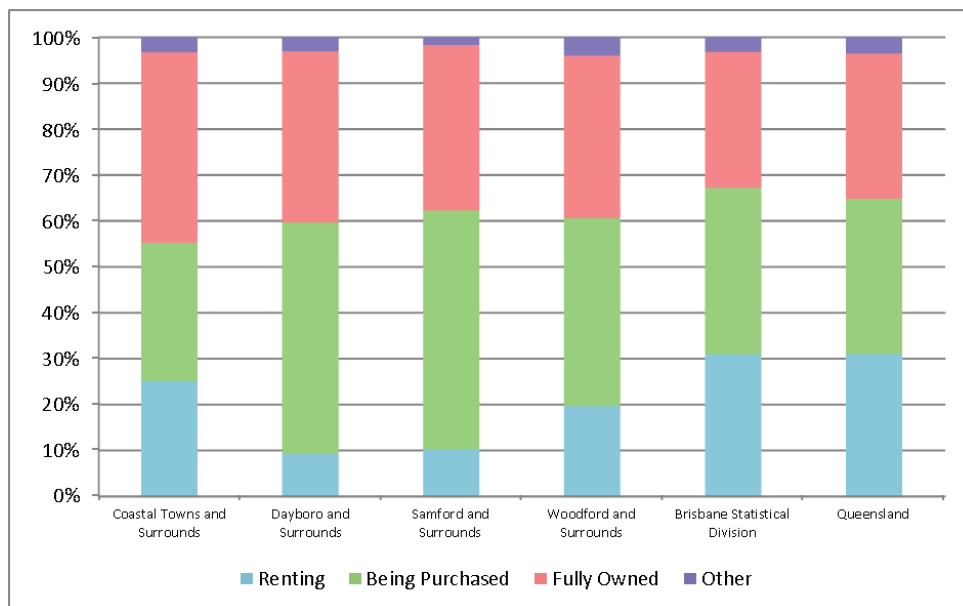
In this study area, 30 per cent of dwellings are being purchased, a low proportion compared to the other study areas – Woodford and Surrounds (41%), Dayboro and Surrounds (50%), and Samford and Surrounds (52%).

Also in comparison to the other study areas, a high proportion of dwellings are being rented (see **Of households renting, 62 per cent are renting from a real estate agent**, 26 per cent are renting from a person not in the same household and 4 per cent from a state housing authority.

Figure 14). Over 25 per cent of dwellings are being rented in the Coastal Towns and Surrounds study area compared with 20 per cent in Woodford and Surrounds, 10 per cent in Samford and Surrounds and 9 per cent in Dayboro and Surrounds.

Of households renting, 62 per cent are renting from a real estate agent, 26 per cent are renting from a person not in the same household and 4 per cent from a state housing authority.

Figure 14: Tenure type, Study Areas, Brisbane Statistical Division, Queensland, 2006



Source: ABS, 2007 [Census Data].

Rent by Landlord Type

Table 18: Rent by landlord type, Coastal Towns and Surrounds, 2006

Weekly Rent	Real estate agent		State housing authority		Person not in the same household		Other	
\$0-\$99	0	0%	10	25%	24	8%	39	36%
\$100-\$179	103	15%	16	40%	84	29%	37	35%
\$180-\$224	242	36%	11	28%	103	36%	20	19%
\$225-\$274	212	32%	3	8%	39	14%	0	0%
\$275-\$349	84	13%	0	0%	17	6%	8	7%
\$350 and over	16	2%	0	0%	6	2%	3	3%
Total	665	99%	40	100%	286	95%	107	100%

Residential Aged Care

There were no residential aged care facilities located in the Coastal Towns and Surrounds study area in 2011 despite around 1,850 people aged 70 years or older living in this area. According to benchmarking undertaken for this project, there is a current need for 77 low care beds and 64 high care beds in this study area in order to achieve the level of provision provided throughout the Moreton Bay Regional Council area, and 82 low care beds and 82 high care beds to reach the national target.

By 2031, 169-181 low care beds and 140-181 high care beds are estimated to be required. Given the average number of beds per facility in the Moreton Bay Region, this demand could be satisfied with 2-3 low care facilities and 2-3 high care facilities. These facilities could each be separate facilities, or facilities offering both low and high care places.

Table 19: Required Residential Aged Care, Coastal Towns and Surrounds¹

Year	Population 70+ years	Required to Meet Current MBRC Provision		Required to Meet Federal Target	
		Low Care Beds	High Care Beds	Low Care Beds	High Care Beds
2011	1,871	77	64	82	82
2016	2,528	104	86	111	111
2021	3,244	133	110	143	143
2026	3,719	152	126	164	164
2031	4,118	169	140	181	181

Source: Buckley Vann Town Planning Consultants

Summary

- The least dispersed population, with around three-quarters of the population living in an urban or rural centre, although some of these towns are very small. Around 54 per cent of the population lived in Sandstone Point or Beachmere in 2006;
- The Coastal Towns and Surrounds population is significantly older than other study areas and the Moreton Bay Region;
- In 2006, the area had a low labour force participation rate, and a high unemployment rate compared to other areas;
- Lowest median incomes for individuals, families and households of the study areas, and lower than Queensland;
- A high proportion of households have no internet connection;
- There are currently no aged care facilities in this study area. By 2031, 169-181 low care beds and 140-181 high care beds are forecast to be required;
- **Comment:** Clear that the two northern study areas are significantly different to the two southern study areas in a broad range of indicators.

¹ Targets represent an absolute minimum level of provision in order to maintain the same level of service.

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APPENDIX C (b)

Consultation Notes

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Caravan Parks

Attn: From: Jessica Chatwin

Company: **Beachmere Lions
Caravan Park** Date: **9 December, 2011**

Subject: **Phone Interview** - did not wish to provide name

Locality: **Coastal Towns and Surrounds**

Telephone interview conducted at approximately 1:30pm.

Services and Residents

The Beachmere Lions Caravan Park provides a total of 46 serviced sites; these are comprised of 8 tent sites and 38 van sites.

The facility provides for both tourists and long term residents, with an approximate split of 60%/40% between these two groups.

The majority of longer term residents are older people over the age of 60 and are predominantly male (approximately 80%).

Blue Care services are permitted to come to the facility, as are other aged care service providers.

Demands and Future Plans

There are currently no shortages or significant demand for caravan parks and related styles of accommodation. Tourists pose the most fluctuating demand in the area.

The facility does not have any plans for expansion or close in the near future.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Caravan Parks

Attn: From: Jessica Chatwin

Company: **Donnybrook Caravan Park** Date: **9 December, 2011**

Subject: **Phone Interview** - did not wish to provide name

Locality: **Coastal Towns and Surrounds**

Telephone interview conducted at approximately 1:40pm.

Services and Residents

The current Donnybrook Caravan Park provides serviced van and tent sites. Residents are expected to bring their own dwellings.

The caravan park provides for a range of tenants, including tourists, semi-permanent residents and long term residents. Approximately 50% of residents are tourists, with the remainder split evenly between semi-permanent and long term residents.

The majority of long term residents are single males over the age of 60 years. At the present time, none of these residents are in need of aged care services.

Demands and Future Plans

There are currently no demands for caravan park accommodation that are not being met.

The future plans for the caravan park are to remain in operation as it currently does.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Caravan Parks

Attn: From: Jessica Chatwin

Company: **Silver Shores** Date: **9 December, 2011**

Subject: **Phone Interview** - did not wish to provide name

Locality: **Coastal Towns and Surrounds**

Telephone interview conducted at approximately 1:50pm.

Services and Residents

The Silver Shores caravan park provides permanent home sites with all privately owned 'dwellings.' Relocatable homes, caravans and tents comprise the majority of dwelling forms in the park.

The majority of residents seek long term accommodation, with very few tourists staying at the park.

Long term residents are primarily retired couples and singles over the age of 60. Blue Care and other aged care providers also visit the site regularly.

Demands and Future Plans

During the weekends, demand from tourists is high.

The park seeks to remain as a caravan park for the foreseeable future.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Caravan Parks

Attn: From: Jessica Chatwin

Company: **Toorbul Caravan Park** Date: **9 December, 2011**

Subject: **Phone Interview** - did not wish to provide name

Locality: **Coastal Towns and Surrounds**

Telephone interview conducted at approximately 2:00pm.

Services and Residents

The Toorbul Caravan Park provides a range of facilities for residents. The site currently contains 2 cabins, 9 permanent sites, 9 semi-permanent sites and 18 tourist sites. Semi-permanent residents are those that visit the site for the weekend for recreational reasons, however, their accommodation remains there during the week for a nominal fee and is reserved for their use whenever they require it.

Tourists and long term residents (permanent and semi-permanent) comprise an even split of the population of the Toorbul Caravan Park.

The majority of permanent residents are retired couples and singles. Those that retain semi-permanent residences are primarily middle-aged with children, who use the site as a holiday spot.

The majority of permanent residents are over 60 years of age. Half of these residents are retired, whilst the others still work.

When older residents require more care, the majority leave the facility and their sites are taken over by family members.

Demands and Future Plans

Semi-permanent and permanent residences are those in the highest demand.

At the present time, the current owner is seeking to sell the facility, with the intention that it remain as a caravan park.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Retirement Village

Attn: From: Jessica Chatwin

Company: **Live Life Villages – Samford Grove** Date: **9 December, 2011**

Subject: **Phone Interview - Lee Carlyon**
lee.carlyon@samfordgrove.com.au

Locality: **Samford and Surrounds**

Phone interview conducted at approximately 1:00pm.

Current Services and Future Plans

The Live Life Villages – Samford Grove retirement village provides 26 independent living units. There are plans to extend the facility towards the end of 2012, providing an additional 6-8 units.

Opportunities for Ageing in Place

There is no real opportunity for ageing in place, however, the facility does offer support to residents in the form of assisted living and any extra assistance they may need. Services are offered in an attempt to ensure that residents can stay as long as they possibly can before high levels of care are needed.

Demand for Retirement Villages

The facility is currently sold out, however there is no real significant demand for more retirement villages. The facility will be expanding late next year and it is considered that this will be sufficient to meet a naturally increasing demand for such accommodation.

Needs of Residents and Barriers to Entering Retirement Villages

The greatest needs for residents and the key driving factors for why they seek accommodation in retirement facilities is the safety and amenity it affords them. The ability to maintain one's independence in a secure environment is also a very positive attractor. The facility also provides 24 hour emergency care services.

Individuals move to the village because of the positive and supportive environment. The interviewee believes that the facility does not provide any more facilities than what residents may obtain whilst still living in their own homes.

Population Movement Resulting from Housing Difficulties

There does not appear to be a significant number of older residents moving out of the region because of a lack of housing or any perceived housing difficulties. Most residents of the retirement village have come from the local area or moved interstate to be closer to their families.

Required Accommodation to Meet Demands of Ageing Population

It is believed that the planned expansion of the facility will be sufficient to meet demands for the immediate area in the future.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Retirement Village

Attn: From: Jessica Chatwin

Company: **Pebble Beach Retirement Community** Date: **9 December, 2011**

Subject: **Phone Interview - Elaine Quinn**
sales@pebblebeach.com.au

Locality: **Coastal Towns and Surrounds**

Phone interview conducted at approximately 1:15pm.

Current Services and Future Plans

The Pebble Beach Retirement Community provides all freehold sites comprised of independent living units. The facility currently has 75 occupied dwellings, with a further 76 planned for the future and currently under development.

Opportunities for Ageing in Place

There is no opportunity for ageing in place at the current facility and no plans for this in the future.

Needs of Residents and Barriers to Entering Retirement Villages

The primary reasons that many residents move into retirement villages is the need for peace and quiet, security and a supportive environment.

There are currently no barriers to residents entering the facility, despite the poor market. Individuals and couples that wish to enter the facility are currently having difficulty selling their existing properties and as such, cannot move into the facility until they can afford to.

The primary needs of those older people living in the region, that are not currently residing in the retirement village, include access to food, medicine and mobility. Although mobility is quite good in some areas, public transport is lacking in others. There are services available however, that provide food delivery and other such services. These are available to residents living in the retirement facility as well.

Population Movement Resulting from Housing Difficulties

There is not a significant number of older residents moving out of the region because of housing difficulties. The significant majority of older residents just wish to move into a facility or village because they can no longer maintain their current residence or would like some extra security in their lives.

Required Accommodation to Meet Demands of Ageing Population

There is an identified demand for similar facilities to this retirement village. Affordability is the key issues, as is the availability of high care. Existing high care facilities are very expensive and affordable quality care is difficult to find. There is also a significant demand for care facilities on a temporary basis, for those full time carers (mainly family members) who need to take a break from this occupation.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Retirement Village

Attn: From: Jessica Chatwin

Company: **Beachmere Sands Lifestyle Resort** Date: **9 December, 2011**

Subject: **Phone Interview - Keith Armfield**
beachmere@palmmlakeresort.com.au

Locality: **Coastal Towns and Surrounds**

Phone interview conducted at approximately 3:30pm.

Current Services and Future Plans

The Beachmere Sands Lifestyle Resort currently provides 54 independent living units, with plans for an extensive expansion in the coming years. As part of Stage 1, the village will provide an additional 17 units, followed by another 12 in Stage 2. Further to this, another 40 units will be added through subsequent stages.

A vacant lot of rural land currently resides adjoining the village grounds. An application has been lodged with council to use this as both a high and low care facility in the future. There has been a positive response to this application at the present time.

Opportunities for Ageing in Place

An aged care facility is also currently provided in Deception Bay for residents with higher care needs. This facility has 82 beds and is available to residents should they need to move to a higher care facility. This is a form of ageing in place.

Needs of Residents and Barriers to Entering Retirement Villages

The greatest needs for residents before they move to the village include reducing maintenance and care for their residence and implementing a lifestyle change. Most residents wish to move into a community that provides security, a managed unit and the chance to socialize and communicate with other couples and individuals.

The most significant barrier to securing suitable retirement village accommodation for older people is the significant number of baby boomers who are currently retiring and seeking such accommodation. At present, there is an abundance or sufficient supply depending on the area,

of these facilities. However, in 5-10 years time when retirement levels spike, there will be a significant demand for such facilities.

Demand for Retirement Villages

Older residents within the region have high levels of demand that are not necessarily being met at the present moment. Hospitals, shopping facilities and travel opportunities are the three primary concerns. There is a shortage of shopping facilities in the immediate Beachmere area, whilst public transport is considerably difficult to access and use. There is not a sufficient supply of this infrastructure.

Population Movement Resulting from Housing Difficulties

The people who stay at the village are from all over the region and the country. Most residents of the region either move to a village within the area or stay within their homes to stay close to family and friends.

Required Accommodation to Meet Demands of Ageing Population

Housing opportunities for older residents in the future must consider access and mobility. Single storey dwellings are the obvious answer, provide opportunities for communication with neighbours and easy access to areas outside the facility. Condominiums exacerbate isolation problems and do not provide the positive atmosphere that most retirees are looking for.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Retirement Village

Attn:		From:	Jessica Chatwin
Company:	Woodford Country Retirement Villas	Date:	20 December, 2011
Subject:	Phone Interview - Bev Clyne bclyne@bigpond.com		
Locality:	Woodford and Surrounds		

Phone interview conducted at approximately 4:15pm.

Current Services and Future Plans

The Woodford Country Retirement Villas currently has 20 independent living villas.

At present, an application for a nursing home with 85 beds that provides low care, high care and care for patients with dementia, is currently being assessed by the Department of Health and Ageing for the property adjoining the Woodford Country Retirement Villas. The application has been lodged by the facility to expand its range of services. It is expected that a decision will be made either before Christmas or early in the new year.

Opportunities for Ageing in Place

The application for a nursing home that has been lodged for the adjoining property will provide opportunities for ageing in place for residents of the villas. Although Woodford Country Retirement Villas will not undertake the development themselves, 2 committee members will remain on the board of developers and residents from the retirement villas will be given first priority for beds in the nursing home. This is a type of ageing in place/

Needs of Residents and Barriers to Entering Retirement Villages

There is currently a high demand for places in retirement homes and nursing facilities. The primary barriers to entry for these facilities consist of low supply, availability of beds and affordability issues.

It is considered that the needs of elderly residents within the region are currently met and that a strong support network is available to these community members. However, awareness is an issue. As elderly residents are not generally very mobile or active, they are often not aware of

the services that are available for them, unless a family member or other member of their support network notifies them of these services.

Population Movement Resulting from Housing Difficulties

Most elderly residents are forced to move out of the area because of housing difficulties as they get older. This has been the major stimulus for the proposed nursing home facility.

Required Accommodation to Meet Demands of Ageing Population

There will be a greater demand for independent living units and nursing home/low care facilities in the future. There is room for this at Woodford as the Woodford Country Retirement Villas is currently the only facility of its kind in the area and its surrounds.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Real Estate Agents

Attn: From: Jessica Chatwin

Company: Beachmere Real Estate Date: **9 December, 2011**
5496 8555

Subject: **Phone Interview - Jim McArdle (Sales)**
jim@beachmererealestate.com.au

Locality: **Coastal Towns and Surrounds**

Telephone interview conducted at approximately 9:00am.

Locations of Demand

The most sought after location for affordable housing in the locality is Deception Bay.

Smaller dwellings are mostly available in the Caboolture area, with none as small as 450m² or less available in the Beachmere area.

Separate houses (detached dwellings) are mostly found in the Caboolture area as well.

Attached dwellings are primarily located in the Morayfield area.

Dwelling Type Demand According to Demographic Classification

Young single people in the Beachmere area who are purchasing are primarily looking for attached properties as investment items.

First home owners are mainly looking for detached dwellings with at least four bedrooms, two bathrooms and brick finishes. Second home buyers are looking at similar products and not necessarily as investment properties.

Empty nesters in the locality are primarily investment buyers, seeking smaller houses on smaller lots. This includes three bedroom dwellings that are generally less than \$300,000.

Within the Beachmere locality, single elderly people (60-74 years of age) are seeking attached townhouses. Those over 75 years of age are rarely seen as home buyers, but when they are, they are primarily seeking attached dwellings as opposed to any other product.

Single parent families are rarely seen in the buying market, but when they are, they are primarily looking for smaller detached houses, with some land.

Group households in the coastal locality mainly seek detached dwellings with four bedrooms and two bathrooms.

Older people, primarily couples, are also looking for detached dwellings, of a smaller nature.

Current Housing Market Demands To Be Met

There are currently not any demands being expressed by the housing market that are not or cannot be met by the housing market. There is 'something for everyone' in the current buyers market.

Population Movement Resulting from Housing Difficulties

Some renters are moving away from the region as a result of a lack of affordability in products. They cannot afford to rent in areas so close to Bribie and many move to areas such as Caboolture or Morayfield that are less expensive.

Housing Trends Associated with an Ageing Population

To meet changing demands from an aging population, smaller detached properties will need to be supplied, on smaller lots with smaller homes.

Current Housing Market Trends

At present, the building and construction industry is experiencing a slump. There is current not a lot of activity in the Beachmere or other coastal areas, largely because many are moving to the mining areas for long term and constant work. Caboolture is a constantly growing area that cannot meet demand. Supply has decreased rapidly and smaller more affordable houses at present will be subject to wear and tear in the future. The lack of tradespeople to repair these dwellings that may not be habitable in twenty years will have a serious impact on habitable housing in the future.

Future Market Trends Analysis

There are no reports prepared by this agency that may help.

Holiday and Short Term Accommodation Impacts on Housing Supply

There has been an increasing trend of permanent residents moving in to tourist accommodation areas. The Beachmere and other coastal localities in the region are not as sought after as areas such as Noosa. Financial situations are tight for most people and so smaller areas such as Beachmere are the first to fall away as tourist destinations. Owners of rental and tourist accommodation properties are looking for other options to rent their properties so that they can maintain cashflow. There is not a constant flow of tourists to permit properties to remain empty while there are permanent residents looking for rental properties.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Real Estate Agents

Attn: From: Jessica Chatwin

Company: LJ Hooker Beachmere Date: **9 December, 2011**

Subject: **Phone Interview - Len Adelman (Manager) (Sales)**
beachmere@ljh.com.au

Locality: **Coastal Towns and Surrounds**

Telephone interview conducted at approximately 9:20am.

Locations of Demand

With a township of approximately 4,500 people (Beachmere), detached dwellings in the mid \$200,000's or less are spread throughout the area. There is an abundance of affordable acreage and waterfront properties too (\$700,000s – not really affordable housing, but quite low for what it is).

Smaller dwellings (less than 450m²) are rarely seen in the locality, with most lot sizes being 600m² or more.

Separate housing comprises the majority of housing in the township, with a smaller number of attached dwellings. Two or three brand new townhouse developments have recently been developed and are currently for sale.

Dwelling Type Demand According to Demographic Classification

Young single people in the coastal locality are primarily looking for detached dwellings that are \$300,000 or less.

First home buyers are not often seen in the Beachmere market, although there are a lot in Caboolture, particularly around the Central Lakes area. A large shopping centre has been built in the area and may be the reason for a high rate of home purchases.

Second home buyers are also vacant from the Beachmere market, with the double stamp duty regulations in place. The market has become depressed and not many sales have been made from this area in the last year. The Council could promote this area, as there are a lot of affordable properties for second home buyers, representing a great investment opportunities. If any second home buyers have been interested in the area, they are primarily looking for detached dwellings, which is the most significant dwelling form in the locality. Some are also interested in units.

Empty nesters comprise a significant portion of the market as buyers. This market is currently expanding rapidly.

Single elderly people are not often seen in the Beachmere market and those over 75 years of age are primarily interested in the retirement village, as opposed to purchasing a dwelling.

Older couples in the area are looking for value for money are primarily interested in three bedroom detached dwellings at the \$300,000 mark.

Single parent families and group households are not seen in the buyers market and are more targeted for rental properties.

Current Housing Market Demands To Be Met

Demands for affordable housing are not currently being met in the area. This is the current position of the market, with most new properties being upwards of \$315,000 and out of people's price ranges. If these were to be lower, even at the \$299,000 mark, the younger market, with limited cash, may be able to participate in the buyers market. This is occurring throughout Beachmere.

Population Movement Resulting from Housing Difficulties

No people move away from the region because of housing difficulties (that he is aware of).

Housing Trends Associated with an Ageing Population

A number of development sites are currently coming online that may be used to meet the needs and increasing demands for housing for the older generation. Although these areas have not yet been developed, several (2-3) have already been approved by council and will provide reasonable and affordable housing; \$175,000 or around this mark.

Current Housing Market Trends

Trends in rental assistance are assisting the rental market to grow, with first home buyers grants having a positive impact on the buying market. However, the double stamp duty ruling is have a negative on those that are second home buyers and will continue to in the future.

Future Market Trends Analysis

No reports have been completed on property or market trends for the area.

Holiday and Short Term Accommodation Impacts on Housing Supply

There is currently not a lot of holiday rental properties in Beachmere. There is no demand for this type of housing and therefore it is not being provided.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Real Estate Agents

Attn: From: Jessica Chatwin

Company: Elders (Samford) Date: **9 December, 2011**

Subject: **Phone Interview - Frank Assink (Sales and Rentals)**
frank.assink@eldersre.com.au

Locality: **Samford and Surrounds**

Telephone interview conducted at approximately 9:40am.

Locations of Demand

The most sought after locations for affordable housing are close to the village for convenience reasons, as well as attempts to reduce travel costs and capture the rural atmosphere without being located too far out of town.

Smaller dwellings are mainly provided within the village, although the smallest is 600m²; there are no lots less than this.

Separate housing is provided mostly outside the village on acreage, although not too far out of the village.

There are no attached dwellings in the area, as there is currently no demand for it.

Dwelling Type Demand According to Demographic Classification

Young people looking to rent in the Samford area are primarily looking for the busy environment of the village, with the rural atmosphere. They wish to be close to the village on smaller lots and the majority are looking to buy acreage lots in the future.

First home owners are not seen very often in the Samford housing market, as the areas is often too expensive for them.

Second and even third home buyers comprise a significant portion of the housing market in Samford. Low set brick houses are the most desirable dwellings for this market, who wish for privacy and bigger detached dwellings.

It has been observed that empty nesters in the area are shifting back to the city as they get older, selling up their acreage properties to live in smaller dwellings that they can maintain. These individuals and couples are preparing themselves for when they are older and can no

longer maintain larger properties. A few of these individuals rent out their properties, however, the majority look to liquidate their assets for future income purposes.

Single elderly people are not often seen in the area as it is often outside their price range. A few rentals have been sought after by these individuals, comprising approximately 5% of the market. There are not many of these properties available anymore.

Elderly residents over 75 years of age are not often seen in the area, as they usually sell their acreage properties before they become too old to maintain them. Some have health problems and seek to move into areas with more facilities, to retain a better quality of life.

Single parent families are very common in the area, as a result of the high divorce rate. Most have been forced out of the buying market. They often start in the buyers market, having sold large acreage properties as a result of a divorce and are seeking a smaller dwelling in the suburbs. About 5% of the market is comprised of these individuals. The market is quite low in the village, as it is not an investment area. Those that do rent out properties are those who either cannot sell the property, want to retain their home but not live in it or have inherited the house and cannot sell it.

There are currently no group households in the area.

Current Housing Market Demands To Be Met

There are no demands not currently being met in the Samford area. Demand is very low and has had an impact on the viability of real estate agency businesses in the area. Although there was once 9 real estate agencies in the Samford area, this has been reduced to just 3. Sales are down to 25% of what they were only a short time ago.

Population Movement Resulting from Housing Difficulties

Not many people move out of the region because of housing difficulties. A huge supply of housing has meant that there are a record number of properties available in the area. There has been considerable trouble shifting rental properties as well.

Housing Trends Associated with an Ageing Population

The ageing population will increase the demand for smaller lots, although 12 are currently undergoing receivership in the village at present. Currently, demand has dropped for these properties, resulting in a decrease in house prices and no buyers to take advantage of it. Although demand may be high in the future, supply will have to increase now to provide for it. As a result of the lack of public transport in the area, many elderly residents do not remain because once they have lost the ability to drive, there is no primary public transport network that they can rely on. There may be an increasing trend of those moving to the city to live in units because of this insufficiency. The retirement village currently has vacancies and has put development on hold because they cannot fill these vacancies.

Current Housing Market Trends

Housing has got a long way to come. The supply of affordable housing needs to increase, as the cost of living has gone up, housing prices have not responded to the need for affordable housing. There must be changes to the structuring of housing costs to increase demand.

NOTE: The interviewee would like to see more commercial development in the village or the enforcement of a commercial zone. A significant amount of employment has head to Brendale and as a result, there is little to be found in Samford. Manufacturing areas that encourage residents to gain employment in the area are necessary for the future survival of the town.

Future Market Trends Analysis

There are no reports that have been currently developed by this agency that reflect market demands.

Holiday and Short Term Accommodation Impacts on Housing Supply

There is very little tourist accommodation in Samford, although there are a couple of bed and breakfast places. It is not a tourist destination, although there is a demand for a motel or similar units for travelling salesmen, passing visitors who are seeing family and others requiring short term accommodation. There is currently no facility to meet this demand.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Real Estate Agents

Attn: From: Jessica Chatwin

Company: Harcourts Samford Date: **9 December, 2011**

Subject: **Phone Interview - Judy Hearnshaw (Sales and Rentals)**
judy.hearnshaw@samford.com.au

Locality: **Samford and Surrounds**

Telephone interview conducted at approximately 11:30am.

Locations of Demand

Affordable housing is mostly sought after in the village as a first home purchase or for renters, as well as there being some demand for acreage properties.

There are not very many smaller lot sizes in the village, with the smallest lot size being 600m².

Separate housing is sought after primarily in the village and on acreage properties. It is a common trend for residents to sell acreage properties and move to the village as they become older and children move away from home.

There are no detached dwellings in the village or surrounds, with the possible exception of the retirement village.

Dwelling Type Demand According to Demographic Classification

Young people in the area are primarily looking for acreage properties, if they can afford it. They are mainly renters looking for the acreage lifestyle.

Very few first home buyers approach the Samford area, as a result of the high prices.

Most listings in the locality are for acreage properties and this is the primary target for second home buyers. Some seek properties in the village, but demand is largely dependent on what is currently in stock.

There has been a noticeable trend of empty nesters selling acreage properties, having sought the lifestyle for their children and then moving to the village or a suburb closer to the city. This includes The Gap and Spring Hill.

Single elderly people have also been observed selling their acreage properties and moving to the retirement village. This often occurs when maintenance becomes a problem for residents.

Many elderly people do not want to leave their properties and so many remain on acreage lots.

Single parent families are often situated in the village as renters, although there is a mixture of those renting or living as owners on acreage lots. Ownership of acreage properties often becomes impossible because of high maintenance costs.

Group households are very rare within the area, as are older couples within the locality.

Current Housing Market Demands To Be Met

Demands for affordable housing (both renting and buying) are not currently being met. There is an exceeding demand for affordable properties, however it is too expensive to live in the region for many.

Population Movement Resulting from Housing Difficulties

A significant number of residents will stretch their financial situation to remain in the rural environment. However, it is very hard to remain in the area, as there is no accessible public transport. Residents have to be reasonably healthy to remain in the area without having access to sufficient public transport routes.

Housing Trends Associated with an Ageing Population

The existing aged care facility has the room to develop and has plans in the future for this. Elderly residents are looking for affordable retirement options and so there is definitely a demand for more retirement villages or aged care facilities in the region.

Current Housing Market Trends

There are no real trends identifiable for the future, save for the opposition to development in the locality that will most likely continue. This prohibits development and the future of the town to grow.

NOTE: The interviewee stated that she would have liked to have seen the proposed Woolworths be established. She believes the area would significantly benefit from having developments consisting of shops located on the ground floor with residential uses above them, primarily in the town centre. This would bring more people to the area and would cater for the growing tourist destination that Samford is becoming.

Future Market Trends Analysis

There are no reports currently available from this agency.

Holiday and Short Term Accommodation Impacts on Housing Supply

There are no real impacts from tourist or short term accommodation on housing supply. This is because there is currently very limited tourist accommodation in the area. During holiday

seasons, residents struggle to find accommodation for visiting relatives. There is a high demand for some short term accommodation in town as a result.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Real Estate Agents

Attn: From: Jessica Chatwin

Company: LJ Hooker Woodford Date: **9 December, 2011**

Subject: **Phone Interview - Tim Wease (Rentals and Sales**
woodford@ljh.com.au

Locality: **Woodford and Surrounds**

Telephone interview conducted at approximately 11:50am.

Locations of Demand

There are no real locations providing affordable housing in the area, therefore, there is really no noticeable request for such dwellings.

Smaller dwellings are not available within the locality.

Separate housing does not have a large market in the area; this is primarily for investors.

There is a very low demand for attached dwellings in Woodford.

Dwelling Type Demand According to Demographic Classification

Young single people within Woodford are primarily seeking small units (as renters) and smaller houses in town (as buyers).

The majority of first home buyers are looking to purchased renovator style houses in town that they can improve and either resell or continue to live in.

The market for second home buyers varies greatly, from those looking for small acreage and those looking for small houses. The investor market in this area is not significant.

Empty nesters are primarily seeking small acreage properties.

Single elderly people, those aged over 75 years of age and older couples are primarily selling acreage lots and looking to purchase smaller houses and units in town. These are primarily buyers and not renters.

A large portion of single parent families are observable in the locality. As renters and buyers, this demographic are primarily looking for three bedroom houses in town.

NOTE: The interviewee stated that there is a huge influx of residents purchasing acreage in their 30-40s and selling these properties when their health declines (50-60's) to purchase smaller houses or units in town.

Current Housing Market Demands To Be Met

There are currently no demands being made that the housing market cannot meet.

Population Movement Resulting from Housing Difficulties

There are no trends or particularly dominant reasons why people may be moving away from the region. Housing difficulties is certainly not a cause.

Housing Trends Associated with an Ageing Population

The ageing population will have a significant increase in the demand for unit development in town. A caravan park and mobile home development is also needed in the area to meet this demand, amongst others.

Current Housing Market Trends

No other trends were identified.

Future Market Trends Analysis

This agency has not completed any market analysis.

Holiday and Short Term Accommodation Impacts on Housing Supply

There is not a large amount of short term or tourist accommodation provided in the area. The area is not primarily seen as a tourist destination and therefore this is still a developing industry.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Real Estate Agents

Attn: From: Jessica Chatwin

Company: Mike Wheeler Livestock and Property Date: **9 December, 2011**

Subject: **Phone Interview - Gary Brown (Sales and Rentals)**
admin@mikewheeler.com.au

Locality: **Woodford and Surrounds**

Telephone interview conducted at approximately 12:10pm.

Locations of Demand

Affordable housing is mostly sought after on the edge of town.

Smaller dwellings are not available in the Woodford locality, as most are above 800m² throughout the entire district.

Separate dwellings are the most dominant dwelling form and are spread throughout the locality.

There is a definite demand for attached dwellings in the Woodfoord area, however, it is very rare.

NOTE: the interviewee noted that the sewerage plant needed to be upgraded to allow for future residential development. He mentioned that a proposed subdivision had been unsuccessful as a result of the lack of supporting infrastructure for such a development. The interviewee also noted that the town was in great need of a service station.

Dwelling Type Demand According to Demographic Classification

Young single people and first home buyers, as primarily owner/occupiers are looking for detached houses in the region. There is not a significant amount of renters in this category, if any.

Second home buyers moving to or within the region are primarily seeking to upgrade from their current dwelling and lot size or are looking for the opportunity to renovate.

Empty nesters in Woodford are largely moving to acreage sites, whilst those over the age of 60 are primarily moving back into town to take advantage of the over 50's village, which is currently sold out. There is a significant demand for this type of accommodation.

Single parent families are predominantly renters in detached houses.

There are a few group households spread throughout the region, although it is not common.

Current Housing Market Demands To Be Met

There is currently a demand for attached housing in the region, posed by older residents. Subdivision is greatly needed to permit more development in town.

Population Movement Resulting from Housing Difficulties

Not many people move away from the region because of housing difficulty.

Housing Trends Associated with an Ageing Population

There is room to expand the existing retirement facility in town. A full care facility has also been proposed on these premises and should be provided.

Current Housing Market Trends

There are no identifiable future trends in the region.

Future Market Trends Analysis

No reports have been prepared by this agency.

Holiday and Short Term Accommodation Impacts on Housing Supply

There is currently no short term accommodation in the region. There are 2 motels and a few caravan parks, with camping grounds and the showgrounds providing limited camping facilities. There is a definite need for short term accommodation in the area, largely due to the classification of the locality as a tourist destination (music festivals, etc.).

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Real Estate Agents

Attn: From: Jessica Chatwin

Company: LJ Hooker Beachmere Date: **9 December, 2011**

Subject: **Phone Interview - Emma Nolan (Rentals)**
enolan.bribieisland@ljh.com.au

Locality: **Coastal Towns and Surrounds**

Telephone interview conducted at approximately 3:05pm.

Locations of Demand

There have been no real inquiries for affordable housing in the Beachmere area. These are mainly in Bribie Island and Sandstone Point.

There are no smaller dwellings currently for rent in the Beachmere area, under 450m². There has been no inquiry expressing demand for this product either.

There are very few separate dwellings for rent in the Beachmere area; approximately 2 on the LJ Hooker register.

Attached dwellings in the form of duplexes and units are available for rent in the Beachmere area and are of relative demand.

Dwelling Type Demand According to Demographic Classification

Within the Beachmere area, young single people are primarily looking to rent smaller houses. Empty nesters comprise approximately 7-10% of the rental market in both houses and units.

There was no information available on those over 60 years of age as renters in the area.

Current Housing Market Demands To Be Met

There are currently no real demands that are not being met by the current market.

Population Movement Resulting from Housing Difficulties

There has been no noticeable move of people away from the area because of housing difficulties.

Housing Trends Associated with an Ageing Population

With regards to the aging population, there is a definite need for more affordable aged care facilities and retirement villages. Bribie Island and Sandstone Point are two areas in great need of care facilities.

INTERVIEWERS NOTE: The Bribie Island and Sandstone Point localities are not included within the investigation area, however the information has been included should it prove to be relevant at a later date.

Current Housing Market Trends

There are no current trends or trends that may emerge in the future that may affect the supply or demand for rental properties in the area in the future.

Future Market Trends Analysis

The agency has not prepared any market analysis to date.

Holiday and Short Term Accommodation Impacts on Housing Supply

There is no real impact from holiday and short term accommodation on the supply of housing for purchase.

MBRC RURAL AREAS STRATEGY (HOUSING ANALYSIS) – SUMMARY OF CONSULTATION FEEDBACK

Real Estate Agents

Attn: From: Jessica Chatwin

Company: Craig Doyle Real Estate Date: **13 December, 2011**

Subject: **Phone Interview - Michael Flanigan (Sales only, no rental properties)**
mf@doylegroup.com.au

Locality: **Dayboro and Surrounds**

Telephone interview conducted at approximately 9:30am.

Locations of Demand

The most sought after locations in Dayboro and the surrounding areas for affordable housing are primarily the Dayboro township, Mt Pleasant and Samsonvale.

Smaller housing options are not largely available, with only a handful scattered throughout the Dayboro township. These are not very sought after.

Separate dwellings are primarily sought after in the Dayboro township, where access to water and sewer connections is available.

Attached dwellings are not often in demand, with only a few available throughout the township of Dayboro.

NOTE: The interviewee mentioned that the previous town plan for the area originally divided all residential areas into 400m² lots. The smallest lot size now is approximately 600m², as most residents purchased 2 or 3 lots and built on these as one residential address.

Dwelling Type Demand According to Demographic Classification

Within Dayboro and its surrounding areas, there are very few young people aged between 15-24 years of age looking for properties. Those that do are primarily interested in detached dwellings. The same applies to first home buyers.

Second home buyers comprise a significant portion of the housing market in Dayboro, with the majority of these residents looking to acquire small acreage lots. Some demand is also seen from this group for detached houses in the township, although acreage lots are the most in demand. The same applies to empty nesters.

The Dayboro area and surrounds does not include a significant number of elderly people aged over 60 years. This population either lives in the residential areas of the Dayboro township or

lives on small acreage lots in the outer ring of the township. These residents are primarily looking to move closer to the township onto smaller residential lots.

There are some single parent families in the area. This demographic are primarily searching for smaller residential lots in the Dayboro township.

Group households are not completely uncommon in the area, with this portion of the population looking mainly for acreage lots.

Current Housing Market Demands To Be Met

There is a significant demand being expressed for small acreage lots in the area. This demand is coming from those aged between 25-40 years of age. These properties are largely desired in the outer ring of the township.

NOTE: The interviewee mentioned that the real estate agency is also a development company that owns the majority of the last developable lots available in the area. Michael has also lobbied the State government in 2005 and 2009 to have the area included in the urban footprint of the regional plan. The area of the Pine Rivers Plan is not included in this area at present. As such, the interviewee expressed his willingness to have further discussions regarding housing issues in the area to further aid our research.

Population Movement Resulting from Housing Difficulties

Housing difficulties is not perceived to be the primary reason for people leaving the region. Lifestyle change is the major contributor to this social repositioning.

Housing Trends Associated with an Ageing Population

As a result of the ageing population, more small acreage lots are needed within the Dayboro area. The region would also benefit from an aged care facility. At present, no land is zoned so that this type of development would be deemed appropriate.

Current Housing Market Trends

Future trends that may occur include a lack of supply of small acreage lots and a major demand for these properties. People moving to Dayboro are looking for a particular lifestyle that cannot be achieved when the minimum lot size for subdivision is 100 hectares.

Future Market Trends Analysis No formal market analysis or reporting has been undertaken by this agency.

Holiday and Short Term Accommodation Impacts on Housing Supply

Tourist and short term accommodation facilities do not pose any problems for housing purchased in the area at present. There are minimal facilities available for tourist and short term accommodation therefore it is not perceived that this will become a problem.

APPENDIX C (c)

Housing Model

Coastal Towns and Surrounds		Achievable Scenario - Total Dwellings					Existing 2006 Dwelling Stock					Achievable Scenario - Dwellings above Existing 2006 Stock										
2011		Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
	Separate house																					
	Semi-detached, row or terrace house, townhouse etc.																					
	Flat, unit or apartment																					
	Other dwellings and dwellings structure not stated																					
	Total																					
	2016																					
	Separate house	2,421	1,303	592	1,085	201	262	5,863	1,555	1,061	429	693	136	195	4,069	866	242	163	392	65	67	1,794
	Semi-detached, row or terrace house, townhouse etc.	126	17	12	81	5	6	248	59	4	3	40	3	3	112	67	13	9	41	2	3	136
	Flat, unit or apartment	45	10	13	113	0	5	186	23	7	8	68	0	3	109	22	3	5	45	0	2	77
	Other dwellings and dwellings structure not stated	112	14	14	177	6	15	338	71	11	10	111	4	9	216	41	3	4	66	2	6	122
	Total	2,704	1,343	630	1,456	212	288	6,634	1,708	1,083	450	912	143	210	4,506	996	260	180	544	69	78	2,128
	2021																					
	Separate house	2,612	1,295	593	1,195	212	271	6,178	1,555	1,061	429	693	136	195	4,069	1,057	234	184	502	76	76	2,109
	Semi-detached, row or terrace house, townhouse etc.	148	23	15	104	7	8	304	59	4	3	40	3	3	112	89	19	12	64	4	5	192
	Flat, unit or apartment	51	11	13	129	0	6	211	23	7	8	68	0	3	109	28	4	5	61	0	3	102
	Other dwellings and dwellings structure not stated	122	14	14	198	6	15	369	71	11	10	111	4	9	216	51	3	4	87	2	6	153
	Total	2,934	1,342	635	1,627	225	300	7,062	1,708	1,083	450	912	143	210	4,506	1,226	259	185	715	82	90	2,556
	2026																					
	Separate house	2,705	1,266	582	1,280	214	274	6,320	1,555	1,061	429	693	136	195	4,069	1,150	205	153	587	78	79	2,251
	Semi-detached, row or terrace house, townhouse etc.	167	29	20	127	8	9	359	59	4	3	40	3	3	112	108	25	17	87	5	6	247
	Flat, unit or apartment	56	11	14	144	1	6	232	23	7	8	68	0	3	109	33	4	6	76	1	3	123
	Other dwellings and dwellings structure not stated	127	13	14	215	6	16	391	71	11	10	111	4	9	216	56	2	4	104	2	7	175
	Total	3,055	1,320	630	1,765	228	304	7,302	1,708	1,083	450	912	143	210	4,506	1,347	237	180	853	85	94	2,796
	2031																					
	Separate house	2,732	1,231	572	1,328	213	277	6,354	1,555	1,061	429	693	136	195	4,069	1,177	170	143	635	77	82	2,285
	Semi-detached, row or terrace house, townhouse etc.	195	40	25	157	8	10	436	59	4	3	40	3	3	112	136	36	22	117	5	7	324
	Flat, unit or apartment	64	12	15	158	1	7	257	23	7	8	68	0	3	109	41	5	7	90	1	4	148
	Other dwellings and dwellings structure not stated	130	13	14	228	6	16	407	71	11	10	111	4	9	216	59	2	4	117	2	7	191
	Total	3,121	1,296	626	1,871	229	310	7,453	1,708	1,083	450	912	143	210	4,506	1,413	213	176	959	86	100	2,947

Coastal Towns and Surrounds	Low Change Scenario - Total Dwellings					Existing 2006 Dwelling Stock					Low Change Scenario - Dwellings above Existing 2006 Stock									
	2011																			
	Couple family with no children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house																				
Semi-detached, row or terrace house, townhouse etc.																				
Flat, unit or apartment																				
Other dwellings and dwellings structure not stated																				
Total																				

2016	Low Change Scenario - Total Dwellings					Existing 2006 Dwelling Stock					Low Change Scenario - Dwellings above Existing 2006 Stock					Total				
	Couple family with no children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children		One parent family	Lone person household	Group household	Other household
Separate house	2,381	1,289	582	198	258	5,770	1,555	1,061	429	693	136	195	4,069	826	228	153	370	62	63	1,701
Semi-detached, row or terrace house, townhouse etc.	158	29	20	99	8	324	59	4	3	324	40	3	112	99	25	17	59	5	7	212
Flat, unit or apartment	53	11	14	117	6	202	23	7	8	68	0	3	109	30	4	6	49	1	3	93
Other dwellings and dwellings structure not stated	112	14	14	177	15	338	71	11	10	111	4	9	216	41	3	4	66	2	6	122
Total	2,704	1,343	630	1,456	288	6,634	1,708	1,083	450	912	143	210	4,506	996	260	180	544	69	78	2,128

2021	Low Change Scenario - Total Dwellings					Existing 2006 Dwelling Stock					Low Change Scenario - Dwellings above Existing 2006 Stock										
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	2,554	1,274	580	1,155	208	267	6,038	1,555	1,061	429	693	136	195	4,069	999	213	151	462	72	72	1,969
Semi-detached, row or terrace house, townhouse etc.	195	41	26	136	9	11	419	59	4	3	410	3	3	112	136	37	23	96	6	8	307
Flat, unit or apartment	63	13	15	138	1	7	236	23	7	8	68	0	3	109	40	6	7	70	1	4	127
Other dwellings and dwellings structure not stated	122	14	14	198	6	15	369	71	11	10	369	11	9	216	51	3	4	87	2	6	153
Total	2,934	1,342	635	1,627	225	300	7,062	1,708	1,083	450	912	143	210	4,506	1,226	259	185	715	82	90	2,556

2026	Low Change Scenario - Total Dwellings					Existing 2006 Dwelling Stock					Low Change Scenario - Dwellings above Existing 2006 Stock									
	Couple family with no children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	2,628	1,240	563	210	269	6,129	1,555	1,061	429	693	136	195	4,069	1,073	179	134	525	74	74	2,060
Semi-detached, row or terrace house, townhouse etc.	228	52	36	176	12	515	59	4	3	40	3	3	112	169	48	33	136	7	9	403
Flat, unit or apartment	72	14	17	156	1	267	23	7	8	68	0	3	109	49	7	9	88	1	4	158
Other dwellings and dwellings structure not stated	127	13	14	215	6	391	71	11	10	111	4	9	216	56	2	4	104	2	7	175
Total	3,055	1,320	1,765	228	304	7,302	1,708	1,083	450	912	143	210	4,506	1,347	237	180	853	85	94	2,796

2031	Low Change Scenario - Total Dwellings					Existing 2006 Dwelling Stock					Low Change Scenario - Dwellings above Existing 2006 Stock				
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	
Separate house	2,623	1,192	547	1,235	210	273	6,079	1,555	1,061	429	693	136	195	4,069	
Semi-detached, row or terrace house, townhouse etc.	283	75	47	232	11	14	661	59	4	3	661	40	3	71	
Flat, unit or apartment	86	16	19	177	2	7	307	23	7	8	68	0	3	109	
Other dwellings and dwellings structure not stated	130	13	14	228	6	16	407	71	11	10	111	4	9	216	
Total	3,121	1,296	626	1,871	229	310	7,453	1,708	1,083	450	912	143	210	4,506	
								1,413	213	176	959	86	100	2,947	

Dayone and Surrounds		Achievable Scenario - Total Dwellings						Existing 2006 Dwelling Stock						Achievable Scenario - Dwellings above Existing 2006 Stock								
2011		Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house																						
Semi-detached, row or terrace house, townhouse etc.																						
Flat, unit or apartment																						
Other dwellings and dwellings structure not stated																						
Total																						
2016		Existing 2006 Stock						Existing 2006 Stock						2016						Total		
Separate house		Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house		911	1,109	183	335	48	66	2,652	683	956	138	262	32	57	2,128	228	153	45	73	16	9	524
Semi-detached, row or terrace house, townhouse etc.		11	10	2	4	0	0	28	0	0	0	0	0	0	0	11	10	2	4	0	0	28
Flat, unit or apartment		3	1	0	1	0	0	5	0	0	0	0	0	0	0	3	1	0	1	0	0	5
Other dwellings and dwellings structure not stated		9	4	8	0	0	0	21	7	3	6	0	0	0	16	2	1	2	0	0	0	5
Total		935	1,124	194	340	48	66	2,707	690	959	144	262	32	57	2,144	245	165	50	78	16	9	563
2021		Existing 2006 Stock						Existing 2006 Stock						2021						Total		
Separate house		Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house		962	1,107	186	361	47	67	2,729	683	956	138	262	32	57	2,128	279	151	48	99	15	10	601
Semi-detached, row or terrace house, townhouse etc.		16	15	3	7	0	1	43	0	0	0	0	0	0	0	16	15	3	7	0	1	43
Flat, unit or apartment		4	2	1	2	0	0	8	0	0	0	0	0	0	0	4	2	1	2	0	0	8
Other dwellings and dwellings structure not stated		10	4	8	0	0	0	22	7	3	6	0	0	0	16	3	1	2	0	0	0	6
Total		992	1,127	198	370	47	68	2,802	690	959	144	262	32	57	2,144	302	168	54	108	15	11	658
2026		Existing 2006 Stock						Existing 2006 Stock						2026						Total		
Separate house		Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house		995	1,102	186	389	47	70	2,788	683	956	138	262	32	57	2,128	312	146	48	127	15	13	660
Semi-detached, row or terrace house, townhouse etc.		21	20	5	11	1	1	59	0	0	0	0	0	0	0	21	20	5	11	1	1	59
Flat, unit or apartment		5	2	1	3	0	0	11	0	0	0	0	0	0	0	5	2	1	3	0	0	11
Other dwellings and dwellings structure not stated		10	4	8	0	0	0	22	7	3	6	0	0	0	16	3	1	2	0	0	0	6
Total		1,031	1,128	200	403	48	71	2,881	690	959	144	262	32	57	2,144	341	169	56	141	16	14	737
2031		Existing 2006 Stock						Existing 2006 Stock						2031						Total		
Separate house		Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house		998	1,082	183	407	47	71	2,787	683	956	138	262	32	57	2,128	315	126	45	145	15	14	659
Semi-detached, row or terrace house, townhouse etc.		29	30	7	17	1	1	85	0	0	0	0	0	0	0	29	30	7	17	1	1	85
Flat, unit or apartment		7	3	1	4	0	0	17	0	0	0	0	0	0	0	7	3	1	4	0	0	17
Other dwellings and dwellings structure not stated		11	4	8	0	0	0	22	7	3	6	0	0	0	16	4	1	2	0	0	0	6
Total		1,045	1,119	199	428	48	72	2,911	690	959	144	262	32	57	2,144	355	160	55	166	16	15	767

Dayboro and Surrounds 2011	Low Change Scenario - Total Dwellings						Existing 2006 Dwelling Stock						Low Change Scenario - Dwellings above Existing 2006 Stock								
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house																					
Semi-detached, row or terrace house, townhouse etc.																					
Flat, unit or apartment																					
Other dwellings																					
Total																					
2016	Low Change Scenario - Total Dwellings						Existing 2006 Dwelling Stock						Low Change Scenario - Dwellings above Existing 2006 Stock								
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
	897	1,098	180	330	47	65	2,617	683	956	138	262	32	57	2,128	214	142	42	68	15	8	489
	22	20	5	8	1	1	58	0	0	0	0	0	0	0	22	20	5	8	1	1	58
	6	2	1	2	0	0	11	0	0	0	0	0	0	0	6	2	1	2	0	0	11
	9	4	8	0	0	0	21	7	3	6	0	0	0	0	2	1	2	0	0	0	5
Total	935	1,124	194	340	48	66	2,707	690	959	144	262	32	57	2,144	245	165	50	78	16	9	563
2021	Low Change Scenario - Total Dwellings						Existing 2006 Dwelling Stock						Low Change Scenario - Dwellings above Existing 2006 Stock								
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
	942	1,090	182	352	46	66	2,677	683	956	138	262	32	57	2,128	259	134	44	90	14	9	549
	32	30	7	15	1	1	86	0	0	0	0	0	0	0	32	30	7	15	1	1	86
	8	3	1	4	0	0	17	0	0	0	0	0	0	0	8	3	1	4	0	0	17
	10	4	8	0	0	0	22	7	3	6	0	0	0	0	3	1	2	0	0	0	6
Total	992	1,127	198	370	47	68	2,802	690	959	144	262	32	57	2,144	302	168	54	108	15	11	658
2026	Low Change Scenario - Total Dwellings						Existing 2006 Dwelling Stock						Low Change Scenario - Dwellings above Existing 2006 Stock								
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
	969	1,079	180	375	47	69	2,718	683	956	138	262	32	57	2,128	286	123	42	113	15	12	590
	41	41	10	23	1	2	117	0	0	0	0	0	0	0	41	41	10	23	1	2	117
	10	5	2	6	0	0	23	0	0	0	0	0	0	0	10	5	2	6	0	0	23
	10	4	8	0	0	0	22	7	3	6	0	0	0	0	3	1	2	0	0	0	6
Total	1,031	1,128	200	403	48	71	2,881	690	959	144	262	32	57	2,144	341	169	56	141	16	14	737
2031	Low Change Scenario - Total Dwellings						Existing 2006 Dwelling Stock						Low Change Scenario - Dwellings above Existing 2006 Stock								
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
	961	1,048	175	385	46	69	2,685	683	956	138	262	32	57	2,128	278	92	37	123	14	12	557
	59	60	14	34	1	2	170	0	0	0	0	0	0	0	59	60	14	34	1	2	170
	15	7	2	9	0	1	33	0	0	0	0	0	0	0	15	7	2	9	0	1	33
	11	4	8	0	0	0	22	7	3	6	0	0	0	0	4	1	2	0	0	0	6
Total	1,045	1,119	199	428	48	72	2,911	690	959	144	262	32	57	2,144	355	160	55	166	16	15	767

Samford and Surrounds 2011	Achievable Scenario - Total Dwellings	Existing 2006 Dwelling Stock						Achievable Scenario - Dwellings above Existing 2006 Stock					
		Couple family with no children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	One parent family	Lone person household	Group household	Other household	Total
Separate house													
Semi-detached, row or terrace house, townhouse etc.													
Flat, unit or apartment													
Other dwellings and dwellings structure not stated													
Total													
2016		Existing 2006 Stock						2016					
Separate house		Couple family with no children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	One parent family	Lone person household	Group household	Other household	Total
		1,241	1,856	244	401	68	3,007	948	1,619	193	321	54	86
Semi-detached, row or terrace house, townhouse etc.		29	22	3	14	0	68	10	4	0	7	0	21
Flat, unit or apartment		8	2	1	1	0	12	3	0	0	0	0	3
Other dwellings and dwellings structure not stated		5	7	4	17	0	36	4	6	3	13	3	29
Total		1,283	1,886	252	433	68	4,023	965	1,629	196	341	54	89
2021		Existing 2006 Stock						2021					
Separate house		Couple family with no children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	One parent family	Lone person household	Group household	Other household	Total
		1,307	1,848	247	422	70	3,993	948	1,619	193	321	54	86
Semi-detached, row or terrace house, townhouse etc.		36	30	4	19	1	90	10	4	0	7	0	21
Flat, unit or apartment		10	3	1	2	0	16	3	0	0	0	0	3
Other dwellings and dwellings structure not stated		6	7	4	18	0	38	4	6	3	13	3	29
Total		1,358	1,888	256	460	71	4,137	965	1,629	196	341	54	89
2026		Existing 2006 Stock						2026					
Separate house		Couple family with no children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	One parent family	Lone person household	Group household	Other household	Total
		1,355	1,848	249	441	73	4,067	948	1,619	193	321	54	86
Semi-detached, row or terrace house, townhouse etc.		43	39	7	24	1	114	10	4	0	7	0	21
Flat, unit or apartment		11	4	1	3	0	20	3	0	0	0	0	3
Other dwellings and dwellings structure not stated		6	7	4	19	0	39	4	6	3	13	3	29
Total		1,415	1,898	261	487	74	4,241	965	1,629	196	341	54	89
2031		Existing 2006 Stock						2031					
Separate house		Couple family with no children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	One parent family	Lone person household	Group household	Other household	Total
		1,359	1,816	248	452	73	4,046	948	1,619	193	321	54	86
Semi-detached, row or terrace house, townhouse etc.		55	55	9	31	1	153	10	4	0	7	0	21
Flat, unit or apartment		14	6	2	5	0	28	3	0	0	0	0	3
Other dwellings and dwellings structure not stated		6	7	4	19	0	40	4	6	3	13	3	29
Total		1,434	1,884	262	507	74	4,266	965	1,629	196	341	54	89

Woodford and Surrounds
2011

Achievable Scenario - Total Dwellings

Existing 2006 Dwelling Stock

Achievable Scenario - Dwellings above Existing 2006 Stock

	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house							
Semi-detached, row or terrace house, townhouse etc.							
Flat, unit or apartment							
Other dwellings and dwellings structure not stated							
Total							

2016	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	743	709	264	433	50	139	2,339
Semi-detached, row or terrace house, townhouse etc.	9	10	4	10	0	1	34
Flat, unit or apartment	2	1	1	1	0	0	5
Other dwellings and dwellings structure not stated	22	21	13	36	4	4	101
Total	777	741	281	481	55	144	2,479

Existing 2006 Stock	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	515	573	186	305	36	97	1,712
Semi-detached, row or terrace house, townhouse etc.	0	3	0	3	0	0	6
Flat, unit or apartment	0	0	0	0	0	0	0
Other dwellings and dwellings structure not stated	15	17	9	25	3	3	72
Total	530	593	195	333	39	100	1,790

2021	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	801	718	271	470	54	142	2,457
Semi-detached, row or terrace house, townhouse etc.	13	14	5	15	0	1	49
Flat, unit or apartment	3	1	1	3	0	0	8
Other dwellings and dwellings structure not stated	24	22	13	40	5	4	107
Total	842	755	290	528	59	148	2,622

Existing 2006 Stock	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	515	573	186	305	36	97	1,712
Semi-detached, row or terrace house, townhouse etc.	0	3	0	3	0	0	6
Flat, unit or apartment	0	0	0	0	0	0	0
Other dwellings and dwellings structure not stated	15	17	9	25	3	3	72
Total	530	593	195	333	39	100	1,790

2026	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	838	724	275	507	56	148	2,549
Semi-detached, row or terrace house, townhouse etc.	18	18	8	21	1	2	67
Flat, unit or apartment	4	2	1	4	0	0	12
Other dwellings and dwellings structure not stated	25	22	14	43	5	5	113
Total	885	765	298	576	62	155	2,741

Existing 2006 Stock	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	515	573	186	305	36	97	1,712
Semi-detached, row or terrace house, townhouse etc.	0	3	0	3	0	0	6
Flat, unit or apartment	0	0	0	0	0	0	0
Other dwellings and dwellings structure not stated	15	17	9	25	3	3	72
Total	530	593	195	333	39	100	1,790

2031	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	845	710	279	524	57	150	2,564
Semi-detached, row or terrace house, townhouse etc.	25	24	10	30	1	3	93
Flat, unit or apartment	6	2	2	6	0	1	17
Other dwellings and dwellings structure not stated	26	22	14	45	5	5	116
Total	902	758	305	605	63	158	2,791

Existing 2006 Stock	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	515	573	186	305	36	97	1,712
Semi-detached, row or terrace house, townhouse etc.	0	3	0	3	0	0	6
Flat, unit or apartment	0	0	0	0	0	0	0
Other dwellings and dwellings structure not stated	15	17	9	25	3	3	72
Total	530	593	195	333	39	100	1,790

2036	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	852	717	281	529	58	153	2,810
Semi-detached, row or terrace house, townhouse etc.	26	25	11	31	1	3	97
Flat, unit or apartment	7	3	3	7	0	1	21
Other dwellings and dwellings structure not stated	28	24	16	48	2	2	119
Total	913	777	317	615	63	159	2,837

Existing 2006 Stock	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	530	593	195	333	39	100	1,790
Semi-detached, row or terrace house, townhouse etc.	0	3	0	3	0	0	6
Flat, unit or apartment	0	0	0	0	0	0	0
Other dwellings and dwellings structure not stated	15	17	9	25	3	3	72
Total	530	593	195	333	39	100	1,790

Woodford and Surrounds 2011	Low Change Scenario - Total Dwellings						Existing 2006 Dwelling Stock						Low Change Scenario - Dwellings above Existing 2006 Stock								
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house																					
Semi-detached, row or terrace house, townhouse etc.																					
Flat, unit or apartment																					
Other dwellings																					
Total																					

2016	Low Change Scenario - Total Dwellings						Existing 2006 Dwelling Stock						Low Change Scenario - Dwellings above Existing 2006 Stock								
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	732	701	260	426	50	137	2,305	515	573	186	305	36	97	1,712	217	128	74	121	14	40	593
Semi-detached, row or terrace house, townhouse etc.	19	17	7	16	1	2	62	0	3	0	3	0	0	6	19	14	7	13	1	2	56
Flat, unit or apartment	5	1	1	3	0	1	11	0	0	0	0	0	0	0	5	1	1	3	0	1	11
Other dwellings	22	21	13	36	4	4	101	15	17	9	25	3	3	72	7	4	4	11	1	1	29
Total	777	741	281	481	55	144	2,479	530	593	195	333	39	100	1,790	247	148	86	148	16	44	689

2021	Low Change Scenario - Total Dwellings					Existing 2006 Dwelling Stock					Low Change Scenario - Dwellings above Existing 2006 Stock					Total
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total		
Separate house	784	707	265	457	53	140	2,406	515	573	186	305	36	97	1,712	694	
Semi-detached, row or terrace house, townhouse etc.	27	24	10	26	1	3	91	0	3	0	3	0	0	6	85	
Flat, unit or apartment	7	2	2	5	0	1	17	0	0	0	0	0	0	0	17	
Other dwellings	24	22	13	40	5	4	107	15	17	9	25	3	3	72	35	
Total	842	755	290	528	59	148	2,622	530	593	195	333	39	100	1,790	832	

2026	Low Change Scenario - Total Dwellings						Existing 2006 Dwelling Stock						Low Change Scenario - Dwellings above Existing 2006 Stock								
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	816	709	266	487	55	146	2,479	515	573	186	305	36	97	1,712	301	136	80	182	19	49	767
Semi-detached, row or terrace house, townhouse etc.	35	31	15	37	1	4	125	0	3	0	3	0	0	6	35	28	15	34	1	4	119
Flat, unit or apartment	9	3	3	8	0	1	24	0	0	0	0	0	0	0	9	3	3	8	0	1	24
Other dwellings	25	22	14	43	5	5	113	15	17	9	25	3	3	72	10	5	5	18	2	2	41
<i>Total</i>	885	765	298	576	62	155	2,741	530	593	195	333	39	100	1,790	355	172	103	243	23	55	951

2031	Low Change Scenario - Total Dwellings						Existing 2006 Dwelling Stock						Low Change Scenario - Dwellings above Existing 2006 Stock								
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total
Separate house	813	687	267	494	56	148	2,464	515	573	186	305	36	97	1,712	298	114	81	189	20	51	752
Semi-detached, row or terrace house, townhouse etc.	51	45	21	54	2	4	176	0	3	0	3	0	0	6	51	42	21	51	2	4	170
Flat, unit or apartment	13	5	4	12	0	1	34	0	0	0	0	0	0	0	13	5	4	12	0	1	34
Other dwellings	26	22	14	45	5	5	116	15	17	9	25	3	3	72	11	5	5	20	2	2	44
Total	902	758	305	605	63	158	2,791	530	593	195	333	39	100	1,790	372	165	110	272	24	58	1,001

2036	Low Change Scenario - Total Dwellings					Existing 2006 Dwelling Stock					Low Change Scenario - Dwellings above Existing 2006 Stock				
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	
Separate house	810	684	268	497	57	150	2,458	515	573	186	305	36	97	1,712	
Semi-detached, row or terrace house, townhouse etc.	51	45	21	54	2	4	176	0	3	0	3	0	0	6	
Flat, unit or apartment	13	5	4	12	0	1	34	0	0	0	0	0	0	0	
Other dwellings	26	22	14	45	5	5	116	15	17	9	25	3	3	72	
<i>Total</i>	902	768	305	605	63	158	2,791	530	593	195	333	39	100	1,790	

2041	Low Change Scenario - Total Dwellings					Existing 2006 Dwelling Stock					Low Change Scenario - Dwellings above Existing 2006 Stock				
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	
Separate house	807	679	269	500	59	152	2,457	515	573	186	305	36	97	1,712	
Semi-detached, row or terrace house, townhouse etc.	51	45	21	54	2	4	176	0	3	0	3	0	0	6	
Flat, unit or apartment	13	5	4	12	0	1	34	0	0	0	0	0	0	0	
Other dwellings	26	22	14	45	5	5	116	15	17	9	25	3	3	72	
<i>Total</i>	902	768	305	605	63	158	2,791	530	593	195	333	39	100	1,790	

2046	Low Change Scenario - Total Dwellings					Existing 2006 Dwelling Stock					Low Change Scenario - Dwellings above Existing 2006 Stock				
	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	Couple family with no children	Couple family with children	One parent family	Lone person household	Group household	Other household	Total	
Separate house	804	671	270	505	60	155	2,455	515	573	186	305	36	97	1,712	
Semi-detached, row or terrace house, townhouse etc.	51	45	21	54	2	4	176	0	3	0	3	0	0	6	
Flat, unit or apartment	13	5	4	12	0	1	34	0	0	0	0	0	0	0	
Other dwellings	26	22	14	45	5	5	116	15	17	9	25	3	3	72	
<i>Total</i>	902	768	305	605	63	158	2,791	530	593	195	333	39	100	1,790	

APPENDIX C (d)

Methodology for Assessing Housing Demand

Methodology for Assessing Dwelling Demand

Step 1: Population projections by age group

Population projections at a census collection district (CCD) level were provided to the consultant team by the Moreton Bay Regional Council, which were based on the Office of Economic and Statistical Research (OESR) population projections (2009 revision) and subsequently revised by OESR (commissioned by MBRC) in 2010. These projections did not provide a breakdown by age group and gender.

The population projections were then apportioned into age groups using the following process:

- total population by age group for 2006 was obtained from ABS Census data;
- population projections by age group for the Moreton Bay Regional Council area were obtained from OESR;
- the proportional change in population for each age group for the Moreton Bay Regional Council area were applied to the 2006 data; and
- the population projections were then scaled to ensure the total population was equal to the figure estimated by Council in the projections provided.

Step 2: Number of individuals by household type

The number of persons by age group by household type was purchased from the OESR for each customised community of interest for 2006. This data was then applied to the population projections previously estimated to project the number of people by household type.

Step 3: Number of households by household type

Projections of the number of people by household type were then converted into the total number of households for each household type using the average household size for each household type.

The average household size was derived from 2006 census data for each household type using the following calculations¹:

- Family households (lone parent, couple only, couple with children):
 - The average size of each family type was determined by first dividing the number of individuals within each family type by the total number of the family type.
 - Given that a number of families can live in a household, slight adjustments were made by dividing the total number of the family type by the total number of the family households. This assumes that the other family or families resident are the same type as the primary family. With such a small number of multiple family households, this is not expected to significantly affect the results.

¹ Using data for the SLA that most clearly represents each community of interest.

- Lone person households - conversion of the number of persons in lone person households to the total number of households (i.e. 1 person in a lone person household equals 1 lone person household).
- Group households - estimated based on the number of persons in group households and the total number of group households in an area.
- Other households – calculated in the same way as group households (see above).

Step 4: Total dwelling projections and dwelling type projections

The total number of dwellings required over the projection period is taken to equate to the total number of projected households (i.e. one dwelling is required for each household). This accounts for private occupied dwellings and not vacant dwellings or non-private dwellings.

Projections of total number of dwellings by dwelling type were estimated using dwelling type preferences by household type from 2006 census data on the assumption that household type is an important indicator of dwelling type. In other words, preferences for dwelling type were projected based on 2006 census data showing dwelling type by household type (eg. in Woodford and Surrounds, 96.6% of couple with children households resided in separate houses in 2006).

Three dwelling mix scenarios were tested using this method, which included:

- No change scenario – preferences for dwelling types will remain the same (i.e. the same as indicated by the 2006 census data).
- Low change scenario – a small adjustment to dwelling preferences occurs away from separate detached dwellings (i.e. a lower proportion of total households will reside in separate households).
- Target scenario – after reviewing the dwelling type outputs for the low change scenario, the scenario was considered unachievable within a rural context, therefore, another scenario was developed that assumed a lower level of change away from separate detached dwellings will occur. This scenario (the ‘target scenarios’) was discussed and confirmed with the MBRC.

The trend away from separate houses, to smaller dwelling types is considered to be an essential strategy in order to improve housing choice, increase affordability (by introducing a greater range of smaller housing products and more housing stock), create more compact urban form and reduce transport costs.

The target scenario was developed based on a number of considerations, including:

- the communities of interest are predominantly rural townships with rural residential and low density residential character, therefore there is likely to be less demand for smaller dwelling types compared with more urbanised areas;

- faster growing areas can more readily accommodate higher rates of change due to the extent of new development – growth in the study area is predicted to be comparatively low; and
- the outcomes of the targeted consultation with real estate agents, caravan parks operators and retirement village managers that provided an indication of dwelling preferences within each community of interest (refer to **Appendix C (b)** for interview summaries).

The assumptions relating to dwelling preferences under the target and low change scenario are provided in **Table 1** and **Table 2** below. This shows a reduction in preferences for separate houses and redistribution towards semi-detached housing and flats, units and apartments. Under both scenarios, it is assumed that rate of change will increase over time.

Table 1: Dwelling Mix Assumptions (Target Scenario) – Changes in Dwelling Preferences by Household Type (2016 – 2031)

	Couple with children	Couple without children	One Parent	Lone Person	Group	Other
Reduction of preference for separate dwellings (% Points)						
Separate house (2016)	-1%	-1.5%	-1.5%	-1.5%	-0.5%	-0.5%
Separate house (2021)	-1.5%	-2%	-2%	-2.5%	-1%	-1%
Separate house (2026)	-2%	-2.5%	-3%	-3.5%	-1.5%	-1.5%
Separate house (2031)	-3%	-3.5%	-4%	-5%	-2%	-2%
Redistribution of preference for other dwelling types (%)						
Semi-detached (1 storey)	20%	50%	30%	50%	20%	20%
Semi-detached (2 storey)	70%	30%	55%	30%	60%	60%
Semi-detached (total)	90%	80%	85%	80%	80%	80%
Flat, unit or apartment	10%	20%	15%	20%	20%	20%

Table 2: Dwelling Mix Assumptions (Low Change Scenario) – Changes in Dwelling Preferences by Household Type (2016 – 2031)

	Couple with children	Couple without children	One Parent	Lone Person	Group	Other
Reduction of preference for separate dwellings (% Points)						
Separate house (2016)	-2%	-3%	-3%	-3%	-2%	-2%
Separate house (2021)	-3%	-4%	-4%	-5%	-2.5%	-2.5%
Separate house (2026)	-4%	-5%	-6%	-7%	-3%	-3%
Separate house (2031)	-6%	-7%	-8%	-10%	-3.5%	-3.5%
Redistribution of preference for other dwelling types (%)						
Semi-detached (1 storey)	20%	50%	30%	50%	20%	20%
Semi-detached (2 storey)	70%	30%	55%	30%	60%	60%
Semi-detached (total)	90%	80%	85%	80%	80%	80%
Flat, unit or apartment	10%	20%	15%	20%	20%	20%

It is important to note that these results provide a hypothetical scenario based on a particular set of assumptions made by the consultant team in consultation with Council officers. Council may need to consider the level of change likely to be supported for the purpose of the planning scheme, which may require a re-run of the model based on the revised assumptions to create a new 'target' scenario.

APPENDIX D

Ecological, Scenic and
Open Space Issues (Yurrah)

MBRC RURAL AREAS STRATEGY – YURRAH

RECOMMENDATIONS FOR ECOLOGICAL, SCENIC AMENITY AND OPEN SPACE WORKSTREAM –

R1: BIODIVERSITY, CORRIDORS AND LINKAGES:

- a. As previously discussed, once the local biodiversity corridor information for Pine Rural Area is made available to Council, the Caboolture Shire linkages and Pine Rural Area corridors should be reviewed together and long term regional biodiversity nodes and corridors confirmed.
- b. An overlay of VMA 1999 mapping with the Caboolture Nature Conservation Overlay has revealed three areas (east of Mount Mee, East of Delaneys Creek, and North of Rocksberg) that are mapped on the overlay as 'Biodiversity Significance', are vegetated, and might reasonably provide linkages with other areas of remnant vegetation, that may not otherwise be afforded protection under VMA 1999 or via an open space designation. These areas should also be reviewed in detail in the context of the pending biodiversity corridor information and with a view to informing a 'significant local ecological asset profile' within a local government offset policy.
- c. The matter of priority offset locations throughout rural areas would become clearer following the approach recommended at **R3**, and the development of a region-wide nature conservation strategy (and a consistent open space strategy) to formalise this approach is encouraged (Also refer recommendation **R3: OFFSETS**).

2. R2: KOALA & OTHER SPECIFIC FAUNA

- a. Understanding whether and to what extent urban areas can continue to support koala habitat and movement to and from non-urban areas (and what the non-urban offset area requirements will be as a result of likely clearing in urban areas) will be an important consideration in biodiversity and open space planning for the region.
- b. Comprehending the extent to which non-urban areas might currently support habitat and ecosystem function for this species is also important:
 - i. In this regard, an area that may require further investigation and consideration incorporates the Undulating plains and Uplands along the western boundary of the Urban precinct between approximately Bellmere and Dakabin. This area records a high number of unvetted reported koala sightings. Those sightings appear to be concentrated more in the urban precinct, but this could be a direct result of the greater concentrations of potential observers in urban areas.
 - ii. The bushland habitat of this band that falls within the old Pine Rivers shire is protected under the SPRP designations. However, koala habitat north of this, outside of the Koala Assessable Development Areas (KADA and PKADA), is likely to be under significant pressure without greater legislative protection or strong biodiversity policy.
 - iii. Within the old pine rivers shire, the band between Rush Creek, Narangba and south of Sheepstation Creek Conservation Park not only

has a high proportion of mapped Bushland Habitat and unvetted koala sightings by area but also a number of areas of mapped remnant vegetation containing Endangered/Of concern Regional Ecosystems. This area may also require further investigation.

- iv. Please note that the unvetted koala sightings (which have been reviewed in the context of the available state-based mapping) are collated from online databases that allow members of the community to report sightings with very little supporting data and no currently accepted scientific validation process. A more in-depth review into koala population studies in the area would be required in order to confirm their distribution and movement.

3. R3: OFFSETS

- a. In order to address the risks associated with poor extent, 'connectedness', health and condition of habitat, the strategic focus for offset sites should be on:
 - i. a combined review of the local biodiversity corridor information for Pine Rural Area (Expected April 2012) and the Caboolture Shire linkages in the context of long term regional biodiversity nodes and corridors (Refer Recommendation **R1: BIODIVERSITY**).
 - ii. The nature and condition of biodiversity corridors to and through urban areas.
 - iii. The opportunity for an array of targeted policy, and structure planning exercises, to make offsets on key rural residential land more attractive to land holders.
 - iv. The opportunity for offsets on larger rural land holdings is another aspect to consider, particularly where those allotments contain degraded waterways and are not otherwise expected to be developed within the current planning horizon.
 - v. Access to external offset sites in order to plan, implement and maintain the offset is expected to be a persistent issue with all offsets, with the assurance of reasonable access to be the responsibility of the applicant.
 - vi. Where appropriate (and where DERM or another agency has not otherwise committed to provide one), a sieve mapping process could be devised to determine the gamut of priority offset sites, in the context of significant corridors and linkages and possibly feasibility layers to assist the applicant such as slope, bushfire/biodiversity risk, and accessibility.
 - vii. Other inputs, such as priority streams for contributing to waterway health might form appropriate overlays.
 - viii. The matter of priority offset locations throughout rural areas would become clearer following the above, and the development of a region-wide nature conservation strategy (and a consistent open space strategy) to formalise this approach is encouraged (Also refer recommendation **R1: BIODIVERSITY**)

4. R4: LANDSCAPE CHARACTER ISSUES FOR URBAN BREAKS, RURAL RESIDENTIAL AREAS AND TOWNSHIPS:

- a. URBAN BREAK:

- i. The Draft Internal Discussion Paper reinforces Council's view that the existing rural production area and open space network to the north of Caboolture is to be retained as an inter-urban break between the Sunshine Coast and Brisbane metropolitan urban areas.
 - ii. The extent and nature of areas that are important to the continued function of that urban break is a relevant consideration in future planning for the region and the extent and nature of such areas should be identified.
 - iii. Such areas might also reasonably include southern parts of the adjacent Local Government Area (including the Caloundra South UDA).
- b. RURAL RESIDENTIAL AREAS AND TOWNSHIPS:
- i. Identify those significant character issues for each township / area.
 - ii. Frame the rationale and criteria for sensitive urban form.
 - iii. Where appropriate, consider community consultation, a review/update of the existing visual diaries for townships and rural areas, and incorporation of those diaries and/or synthesized community responses into planning scheme policy.

5. R5: SCENIC AMENITY:

- a. The Caboolture Shire scenic amenity provisions appear to be in accordance with Guideline 8 within the SEQRP.
- i. In particular, the broad cadastral based mapping of 'scenic areas', combined with the more detailed scenic amenity and scenic preference mapping under Schedule 7, potentially provides a high level of protection to known and potential high value scenic resources. However, if adapted to the entire region, the code itself may need to be reworded to ensure all important scenic features that are mapped (not just ridgelines or waterways) are adequately protected from development.
 - ii. Guidance is lacking on the process of assessment for areas with scenic amenity values of less than 5 or developments that exceed the 'Maximum Extent of Evident Use'. Both of these issues will need to be addressed in any future codes.
 - iii. **FOR SCENIC AMENITY OUTCOMES IN COASTAL AREAS, the provisions, definitions and expected outcomes of SEQRP Guideline 8 openly conflict or have potential to openly conflict with those of SPP 3/11 and it is recommended that Council obtain advice as to what provisions take precedence.**

6. R6: GENERAL KRA ISSUES:

- a. As previously identified, the specific environmental and scenic amenity issues relevant to KRA separation areas should be understood and consideration should be given as to whether biodiversity and scenic amenity policies need to be reviewed/adapted to address these issues in the context of the KRAs (That is, to ensure a balanced result is manageable and to formulate clear acceptable solutions) or whether the nature of the issues requires separate policies to be developed.

- b. Any expansion of rural residential or township areas to the east of Dayboro or to the east of D'Aguilar / Delaney's Creek should consider, among other things, the Caboolture Shire Linkages in the context of the Local Biodiversity Corridor information for Pine Rural Area (Expected to be available April 2012), and the long term regional biodiversity nodes and corridors that both documents together indicate.

Discussion Paper Appendices

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MBRC-Rural Areas Ecological, Scenic and Open Space Issues

Client: Moreton Bay Regional Council

Authors:

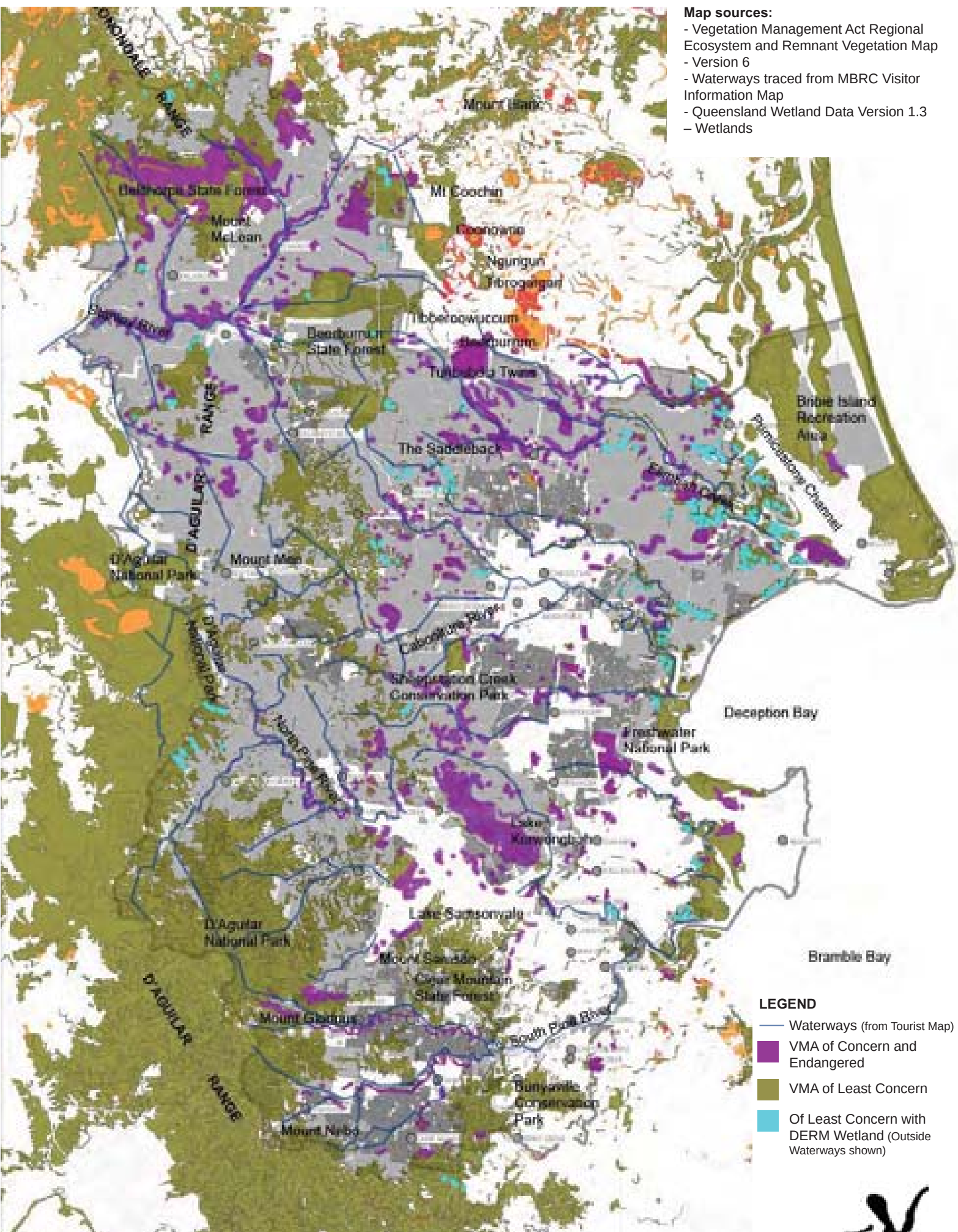
Ecological: Lucy Healing

Scenic and Open Space: Nathan Powell

Job no: 1110047-7

Issue: 001

Date: 22/11/12



FOR DISCUSSION PURPOSES ONLY



Figure 1 - VMA



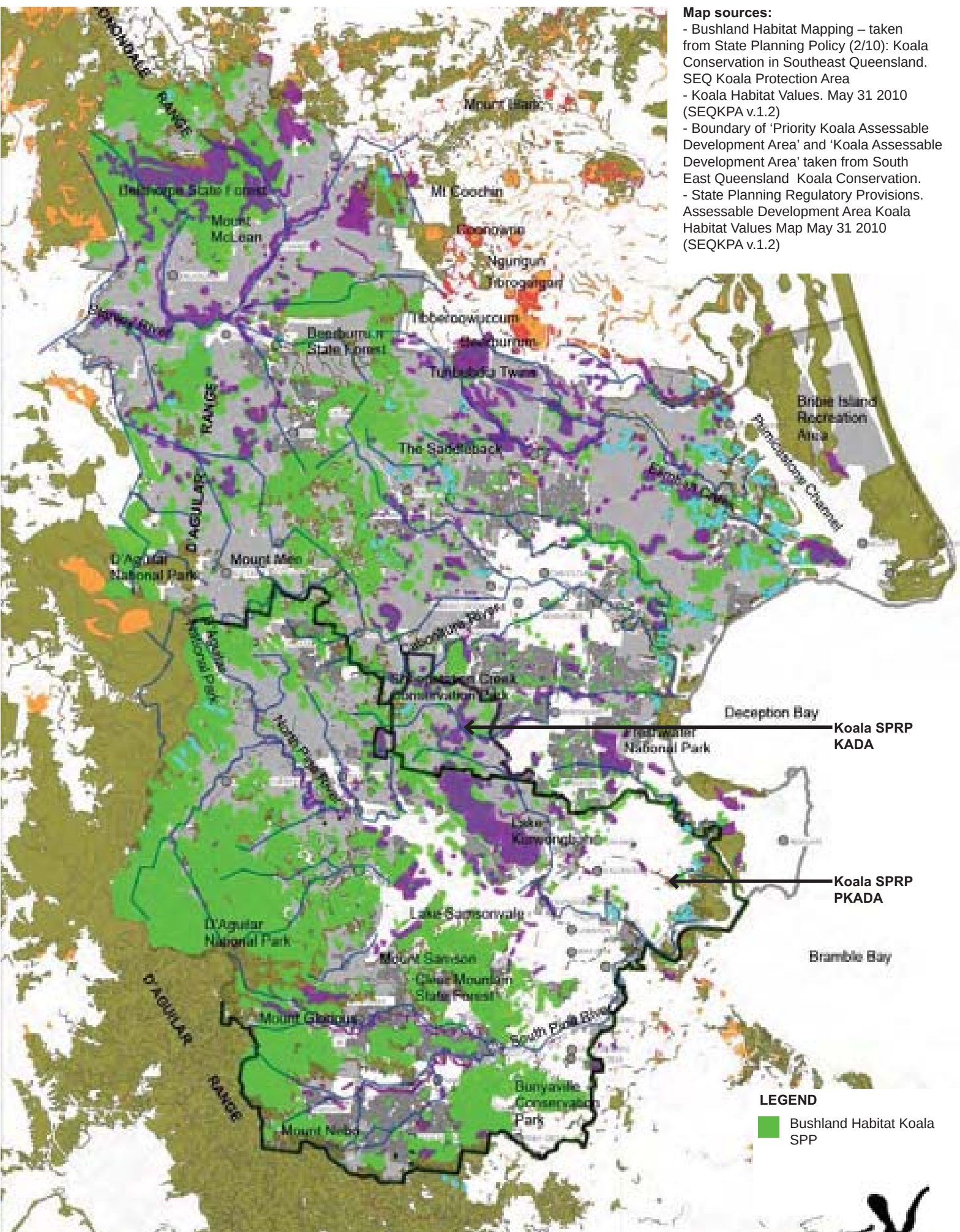


Figure 2 - VMA+SPP

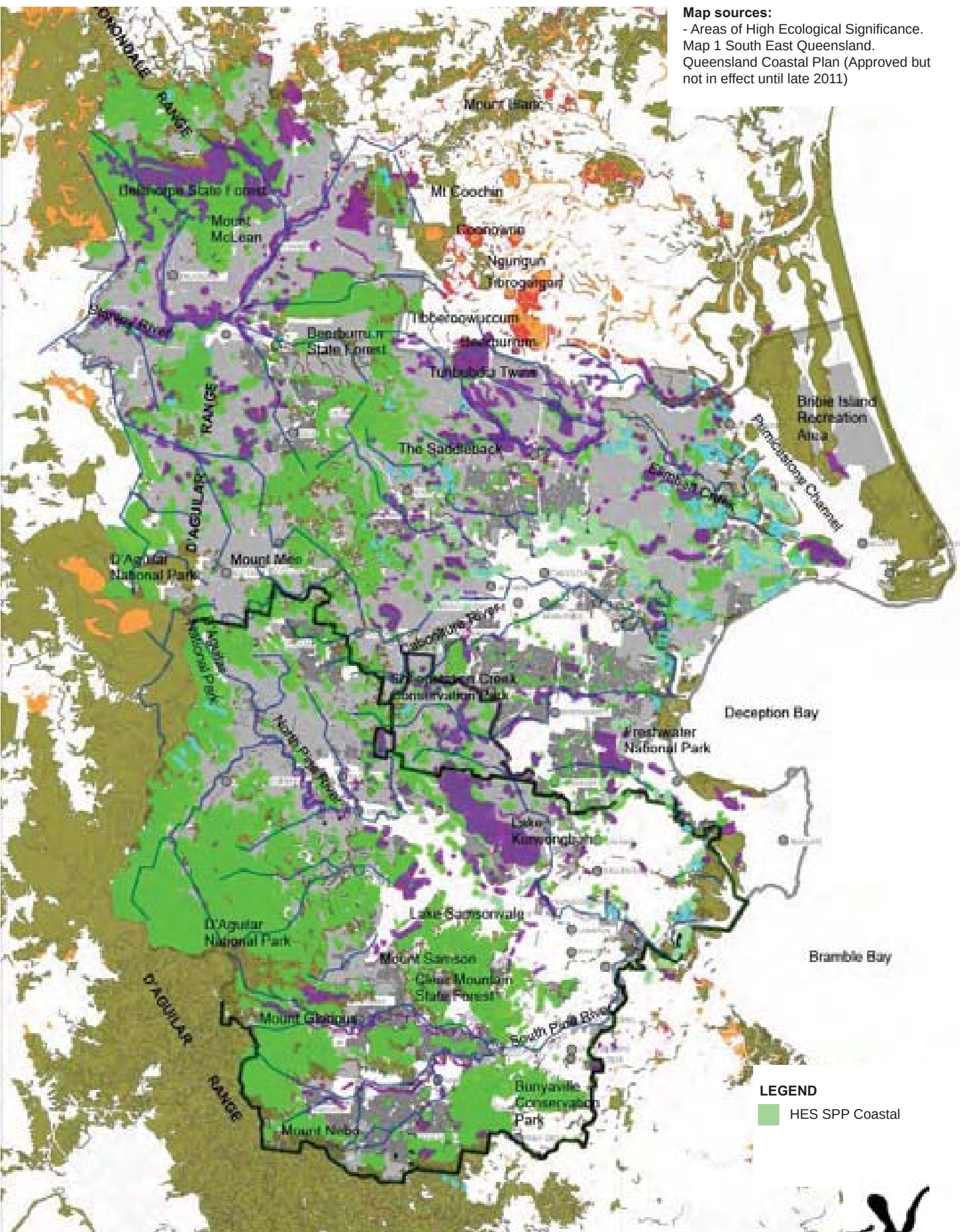


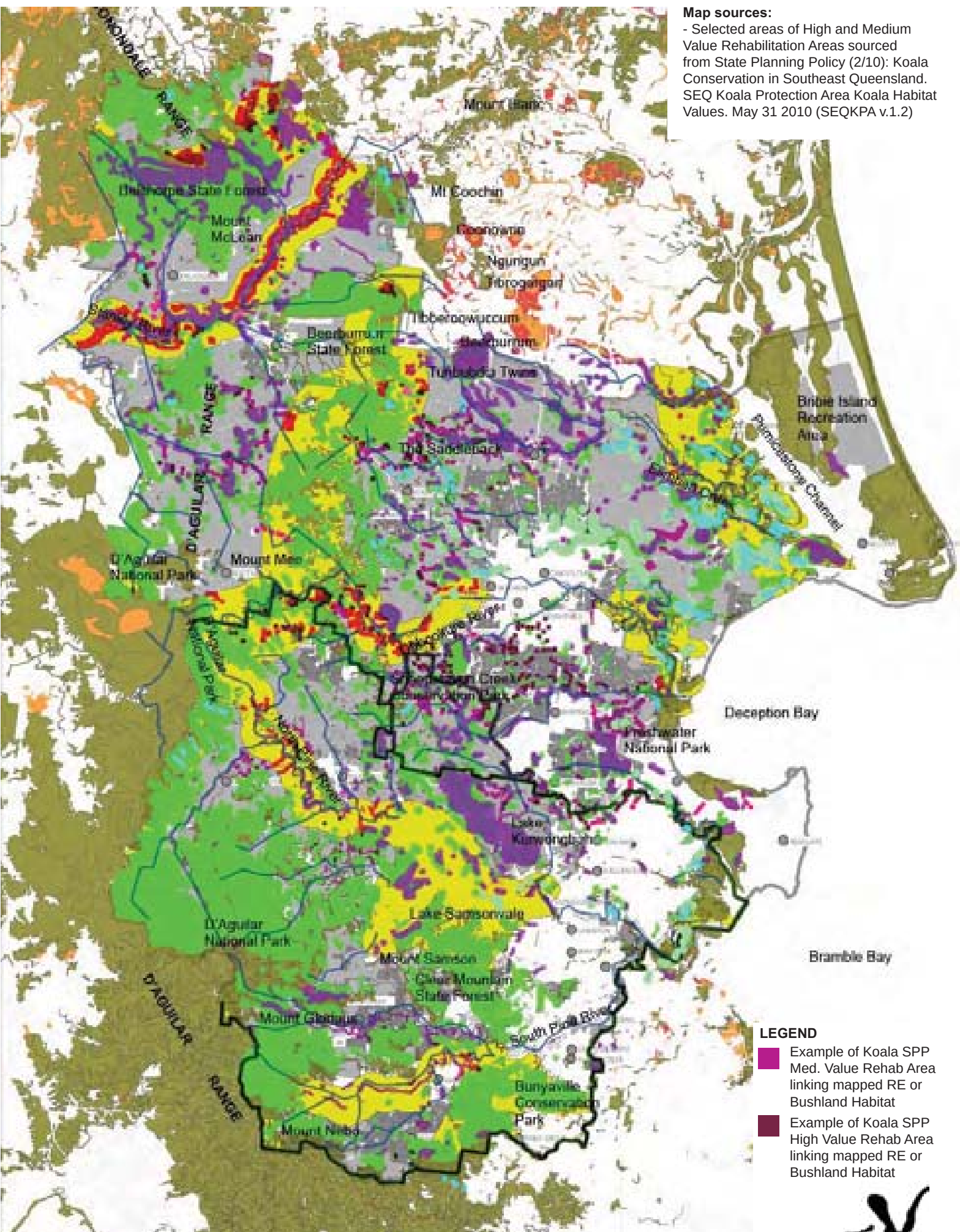
Figure 3 - Coastal HES

- Strategic Rehabilitation Areas – DERM
Biodiversity Planning Assessment data
and extracted by MBRC



Figure 4 - Strategic Rehabilitation Areas





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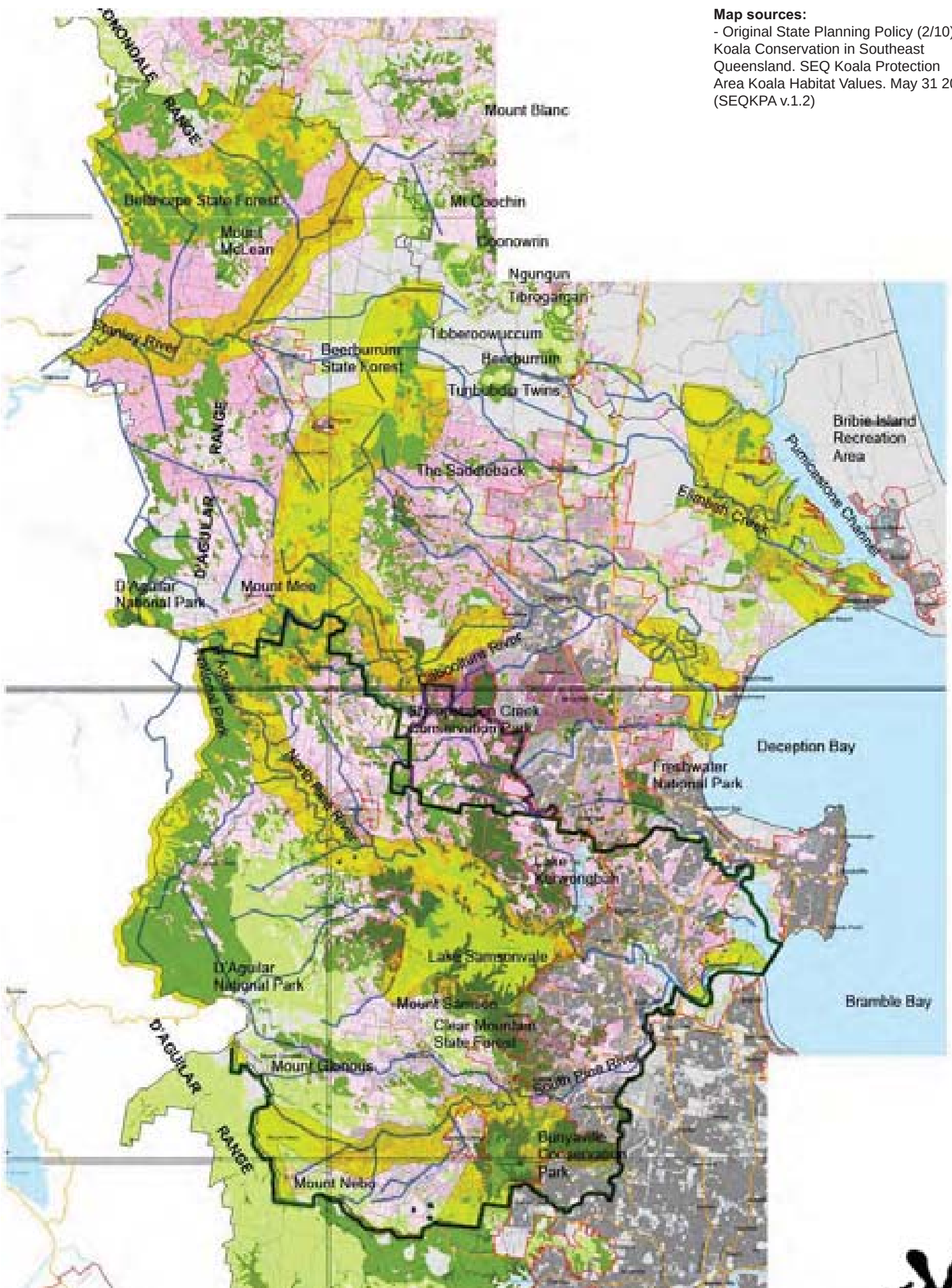
0 5 10 15 20 km

Figure 5 - Example of Rehab links



Map sources:

- Original State Planning Policy (2/10):
Koala Conservation in Southeast
Queensland. SEQ Koala Protection
Area Koala Habitat Values. May 31 2010
(SEQKPA v.1.2)

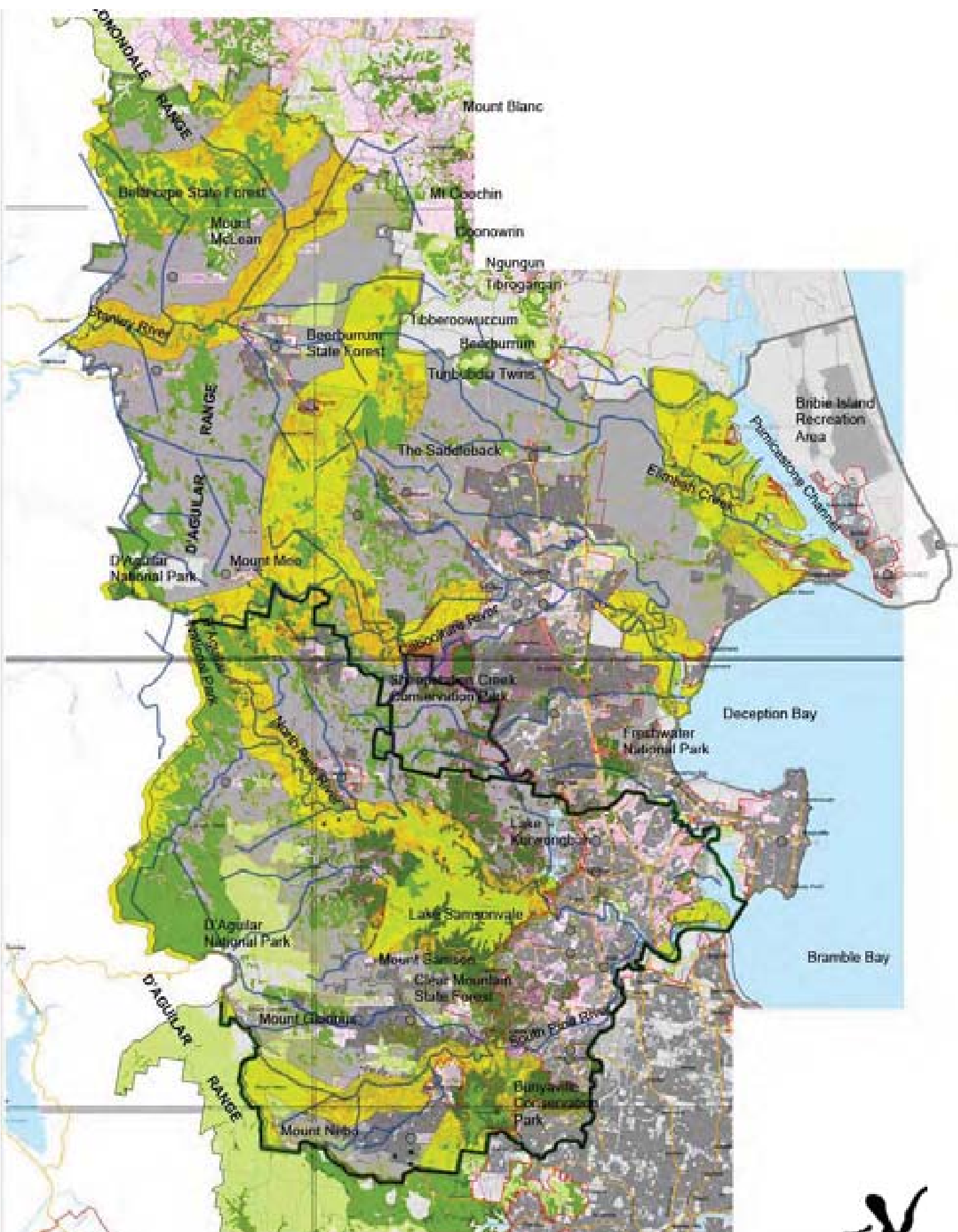


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0 5 10 15 20 km

Figure 6 - SPP+DERM Strategic Rehab Areas





FOR DISCUSSION PURPOSES ONLY

0 5 10 15 20 km

Figure 7 - SPP+DERM Strategic Rehab Areas+Rural



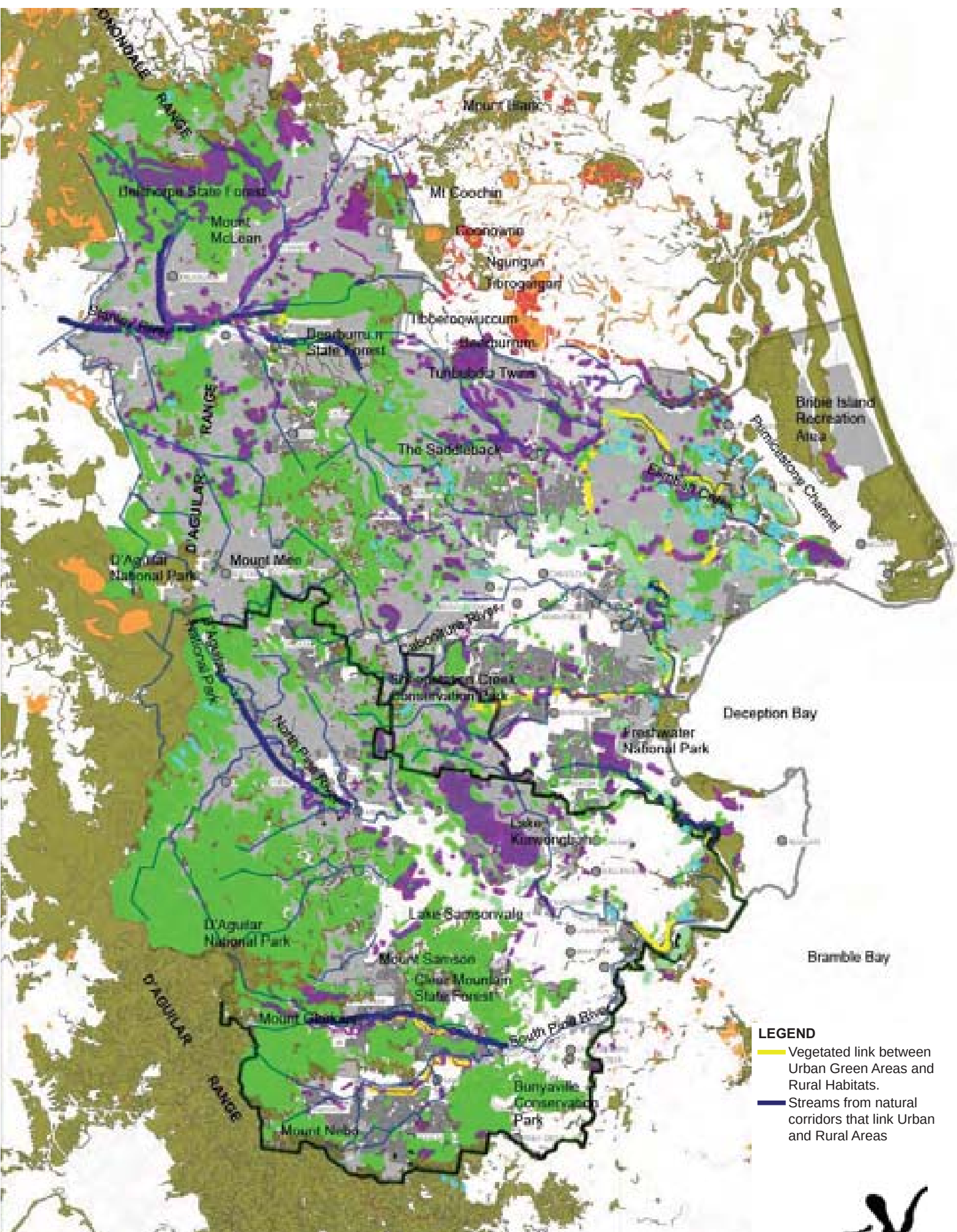
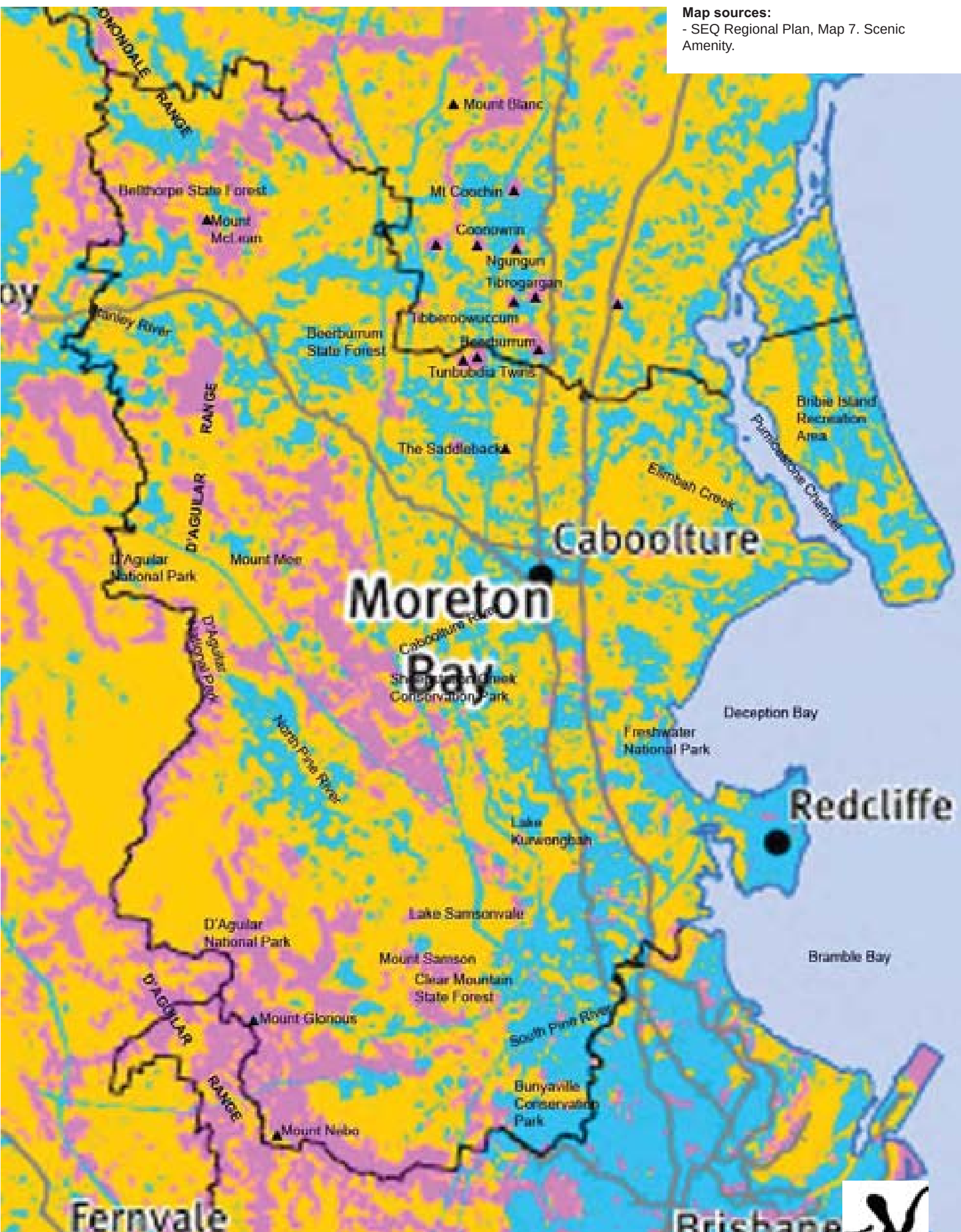


Figure 8 - Linkages



Map sources:
 - SEQ Regional Plan, Map 7. Scenic
 Amenity.



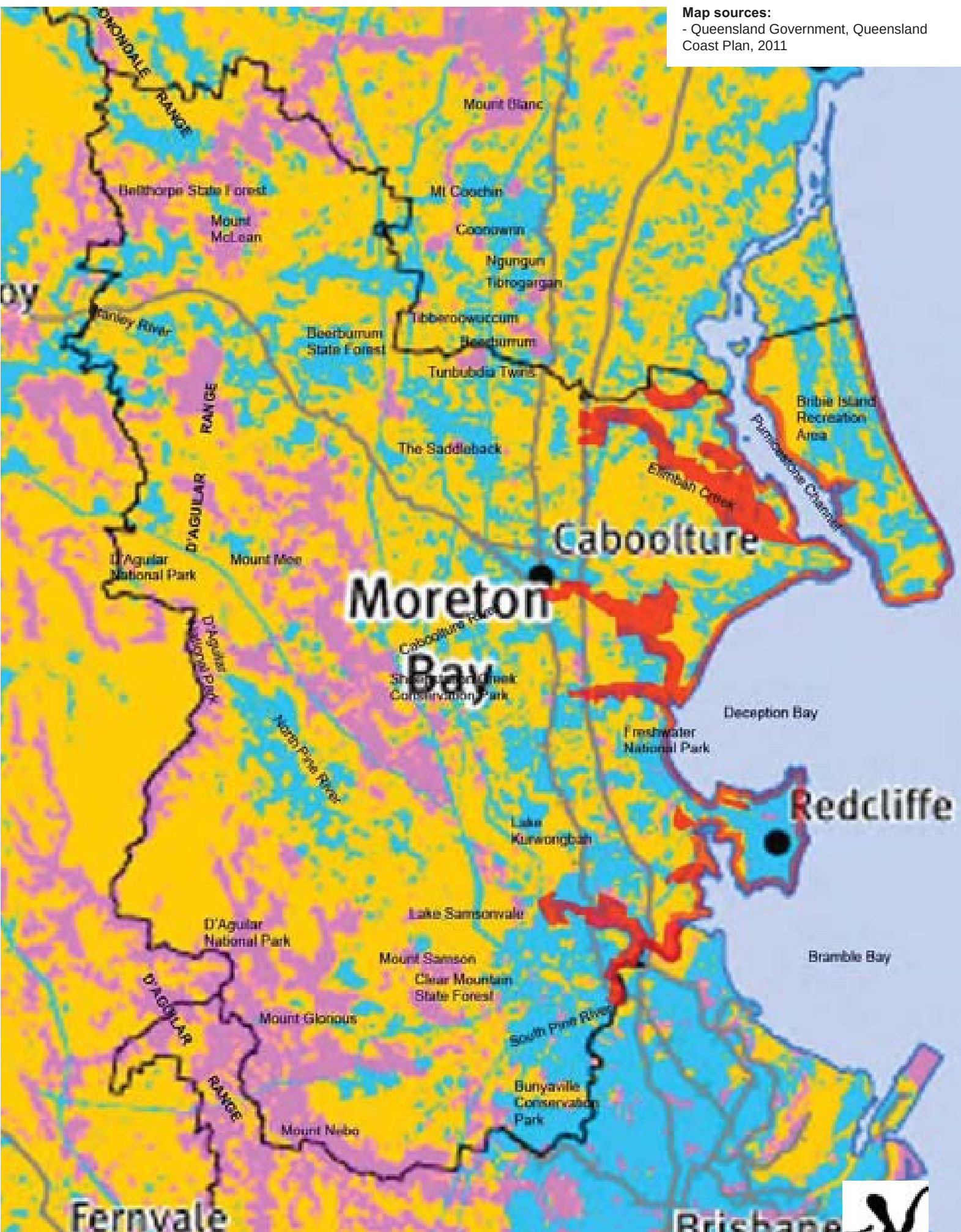
FOR DISCUSSION PURPOSES ONLY

0 5 10 15 20 km

Figure 10 - SEQ Regional Plan Map 07
 Scenic Amenity



Map sources:
 - Queensland Government, Queensland
 Coast Plan, 2011



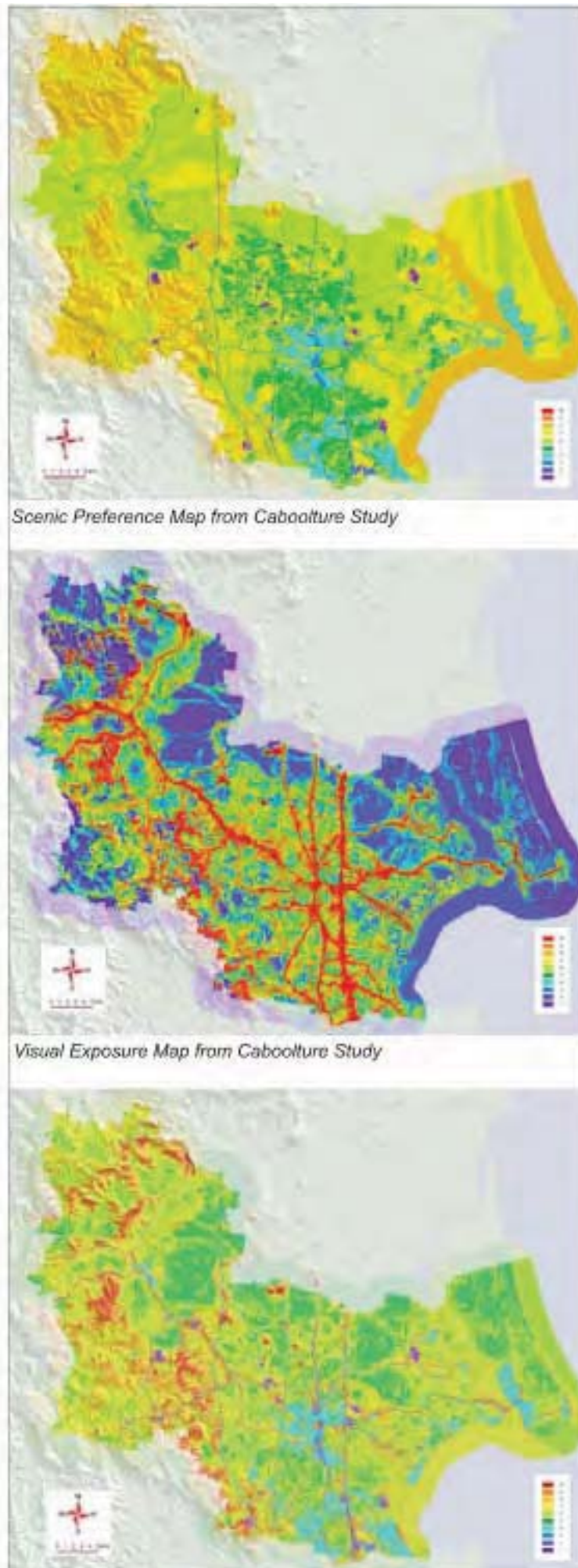
FOR DISCUSSION PURPOSES ONLY

0 5 10 15 20 km

Figure 11 - SEQ Regional Plan Map 07 + Qld.
 Coastal Plan

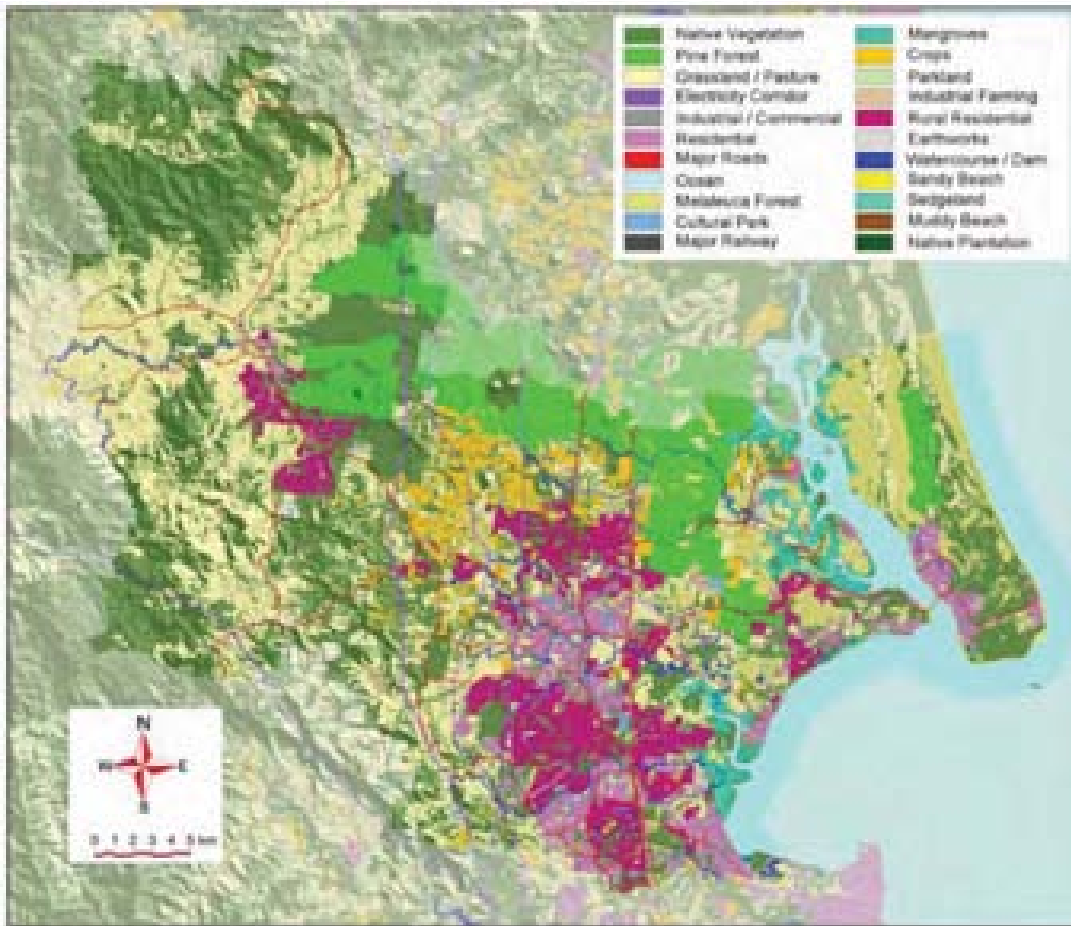


Map sources:
- MBRC Scenic Amenity
Project, 2011, p.14



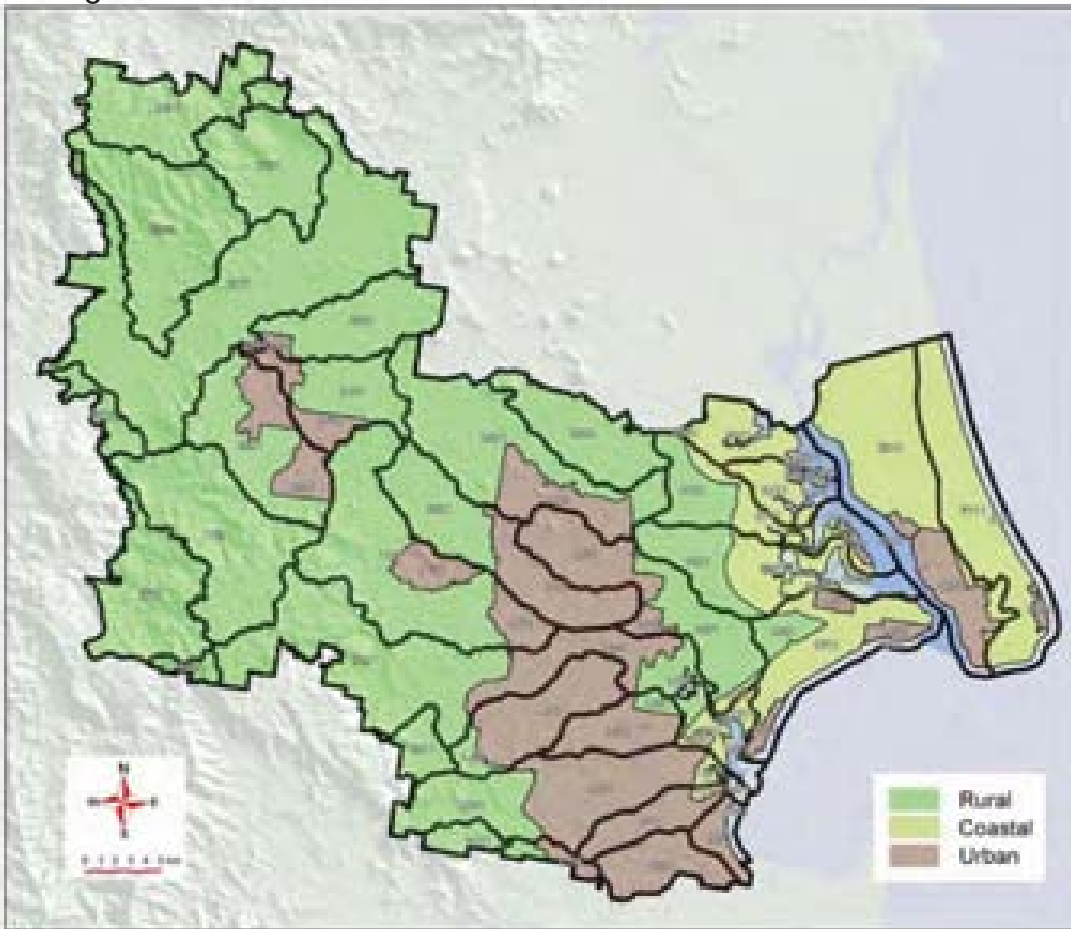
FOR DISCUSSION PURPOSES ONLY

Figure 12 - SEQ Regional Plan Map 07 + Qld. Coastal Plan



Map sources:
 - Scenic Amenity of
 Caboolture Shire
 2003, p.19

Figure 13



Map sources:
 - Scenic Amenity of
 Caboolture Shire
 2003, p.4

Figure 14

Map sources:
- MBRC Scenic Amenity
Project, 2011, *Scenic Amenity
Characterisation in Pine Rivers*,
p.13

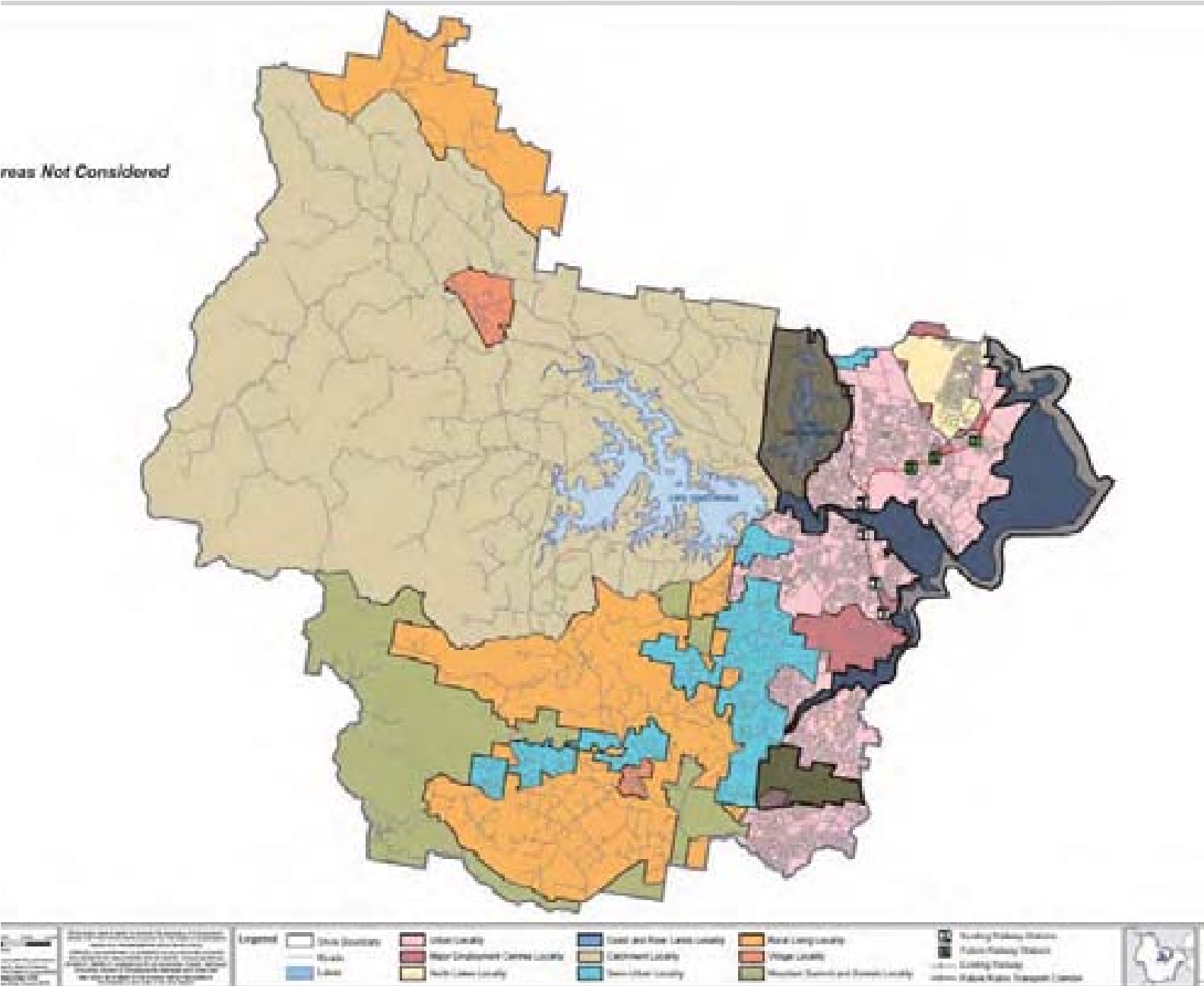
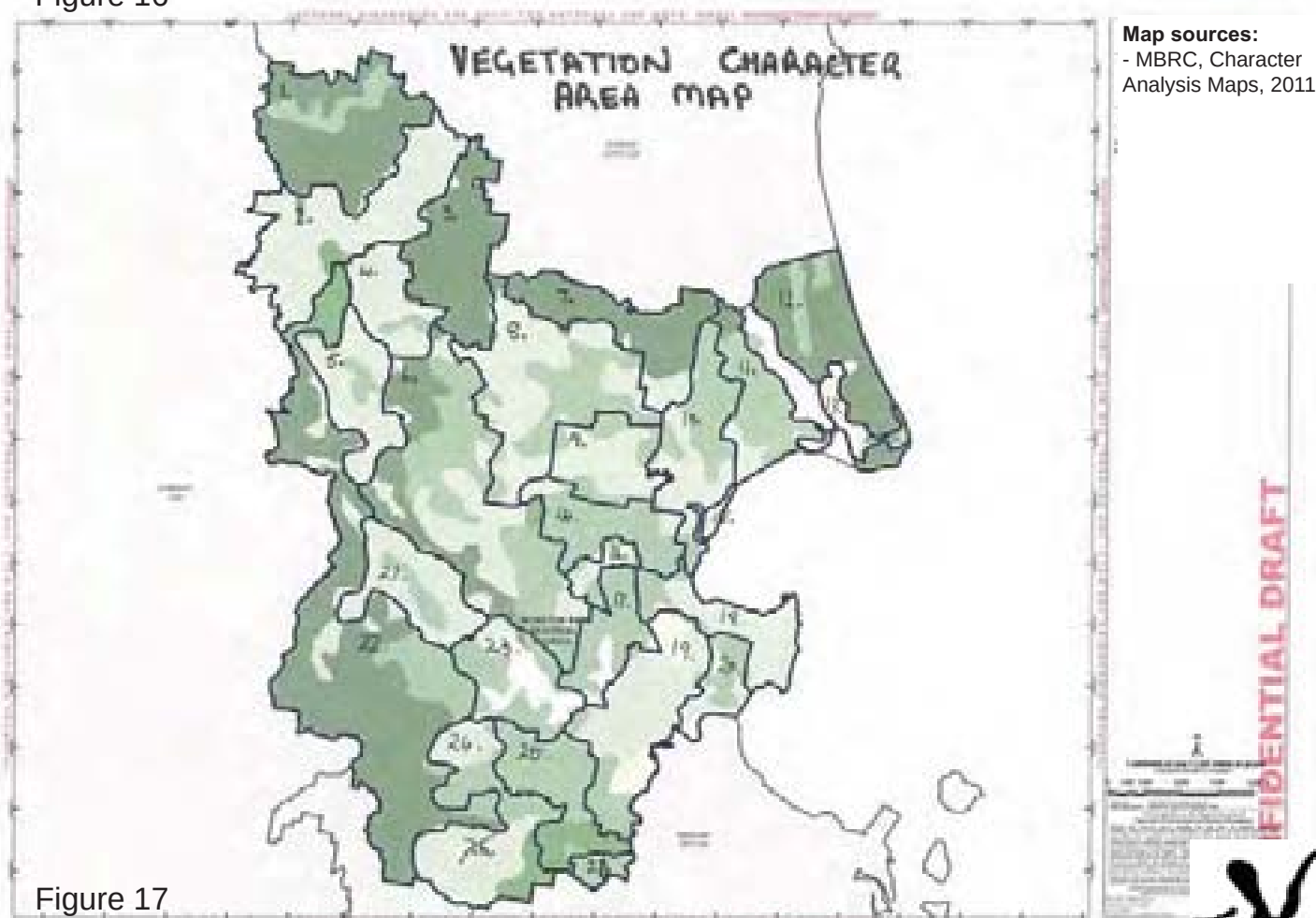
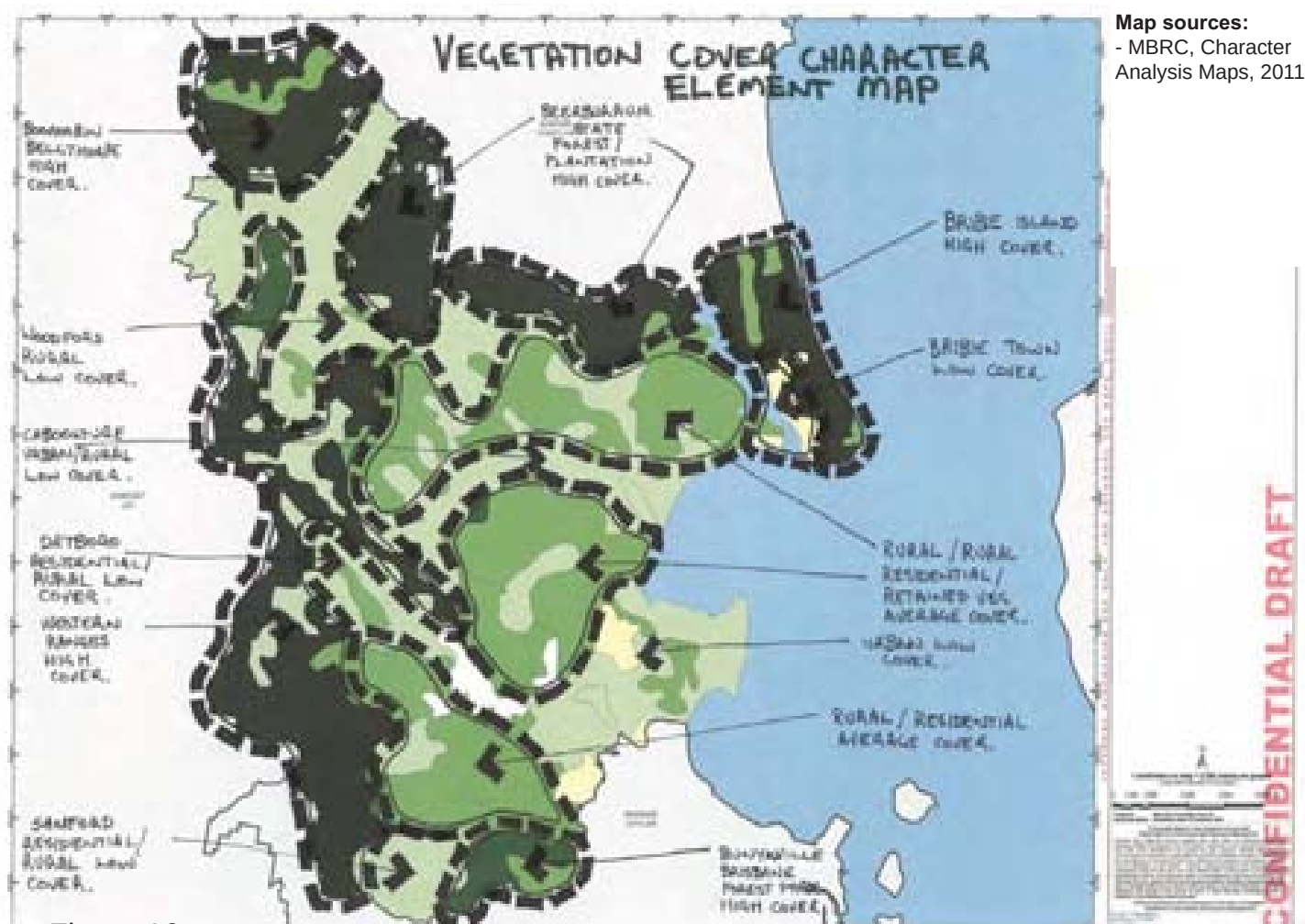


Figure 15

FOR DISCUSSION PURPOSES ONLY



FOR DISCUSSION PURPOSES ONLY

Yurrah

Map sources:
- MBRC, Character
Analysis Maps, 2011

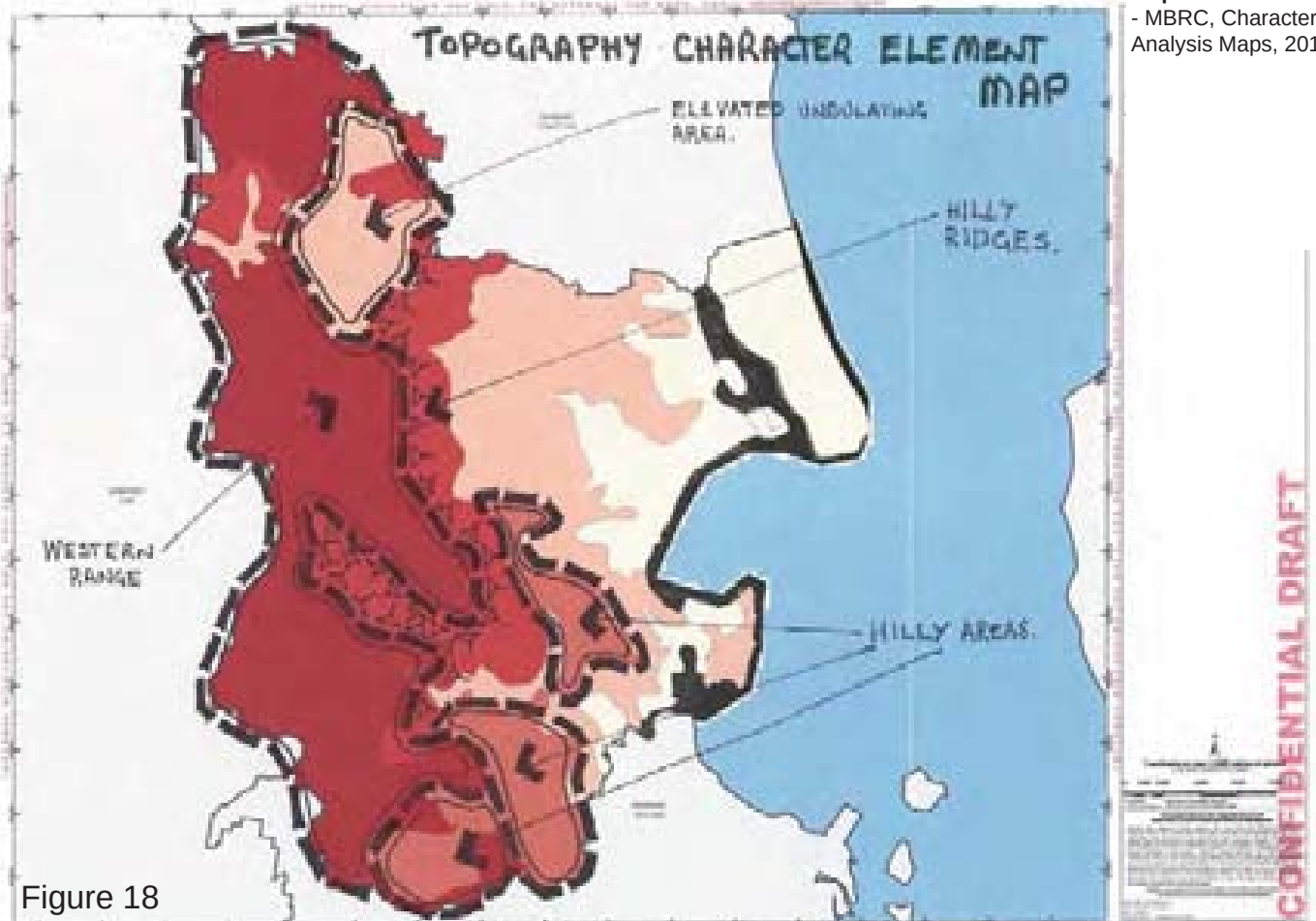


Figure 18

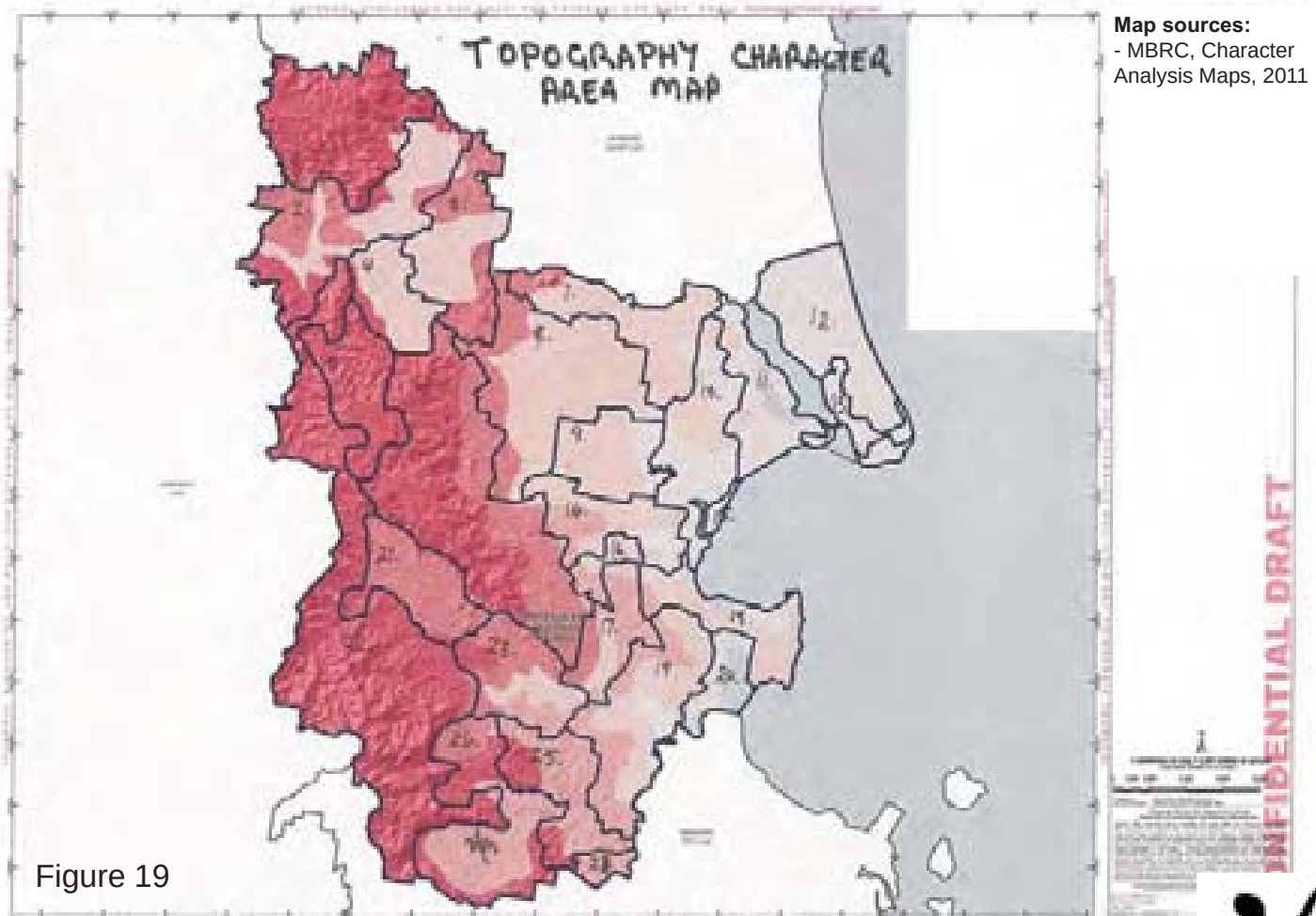
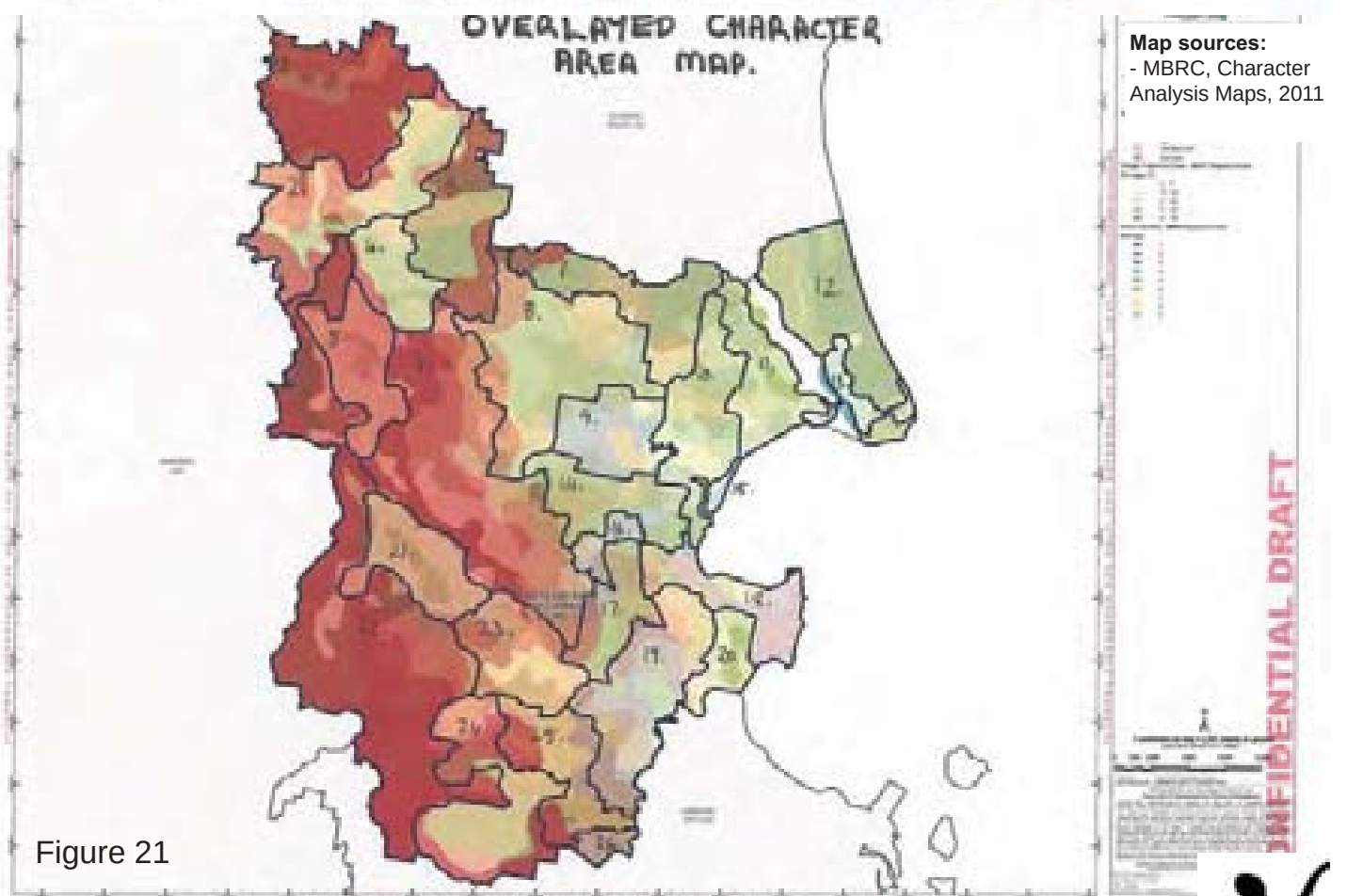
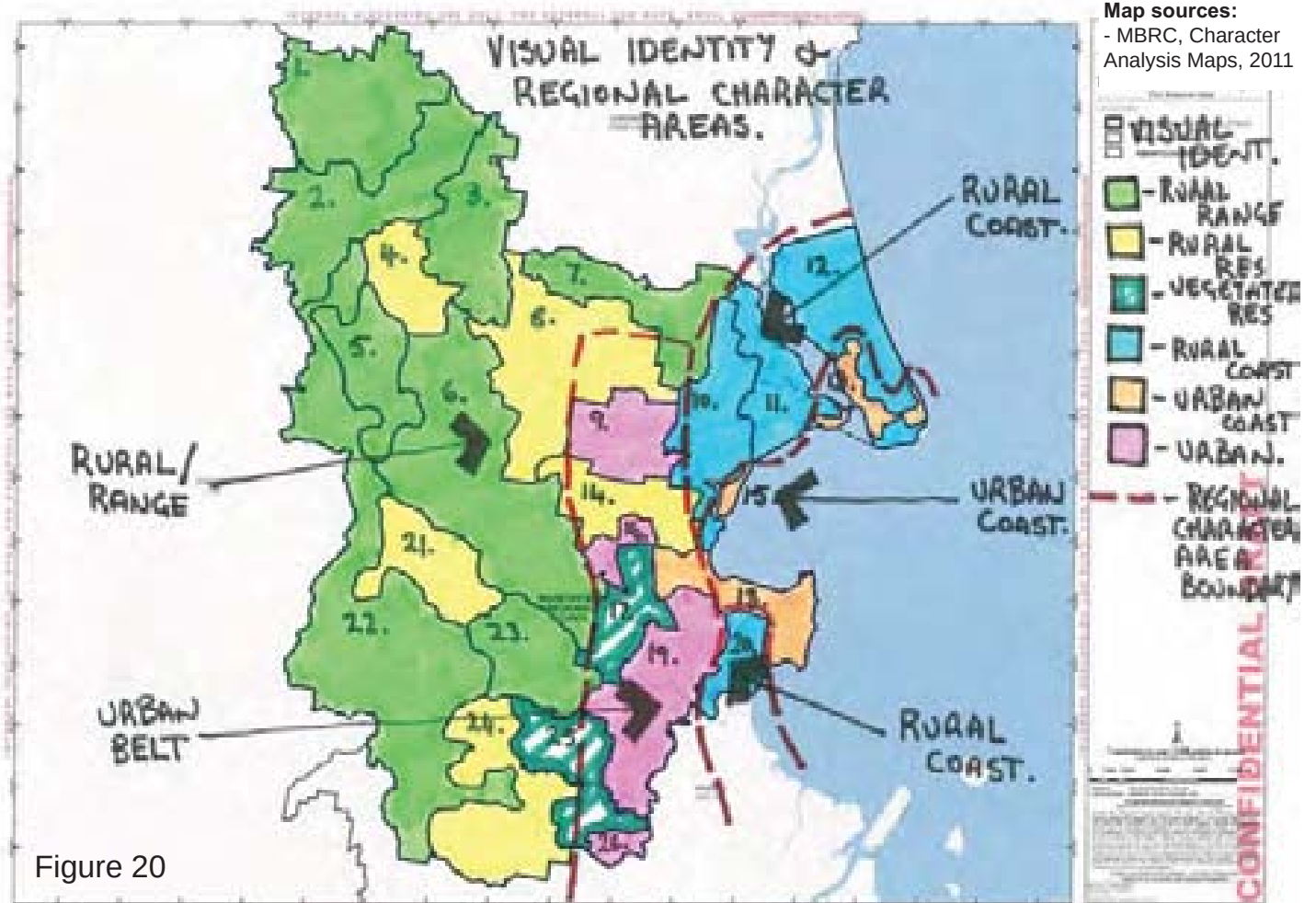
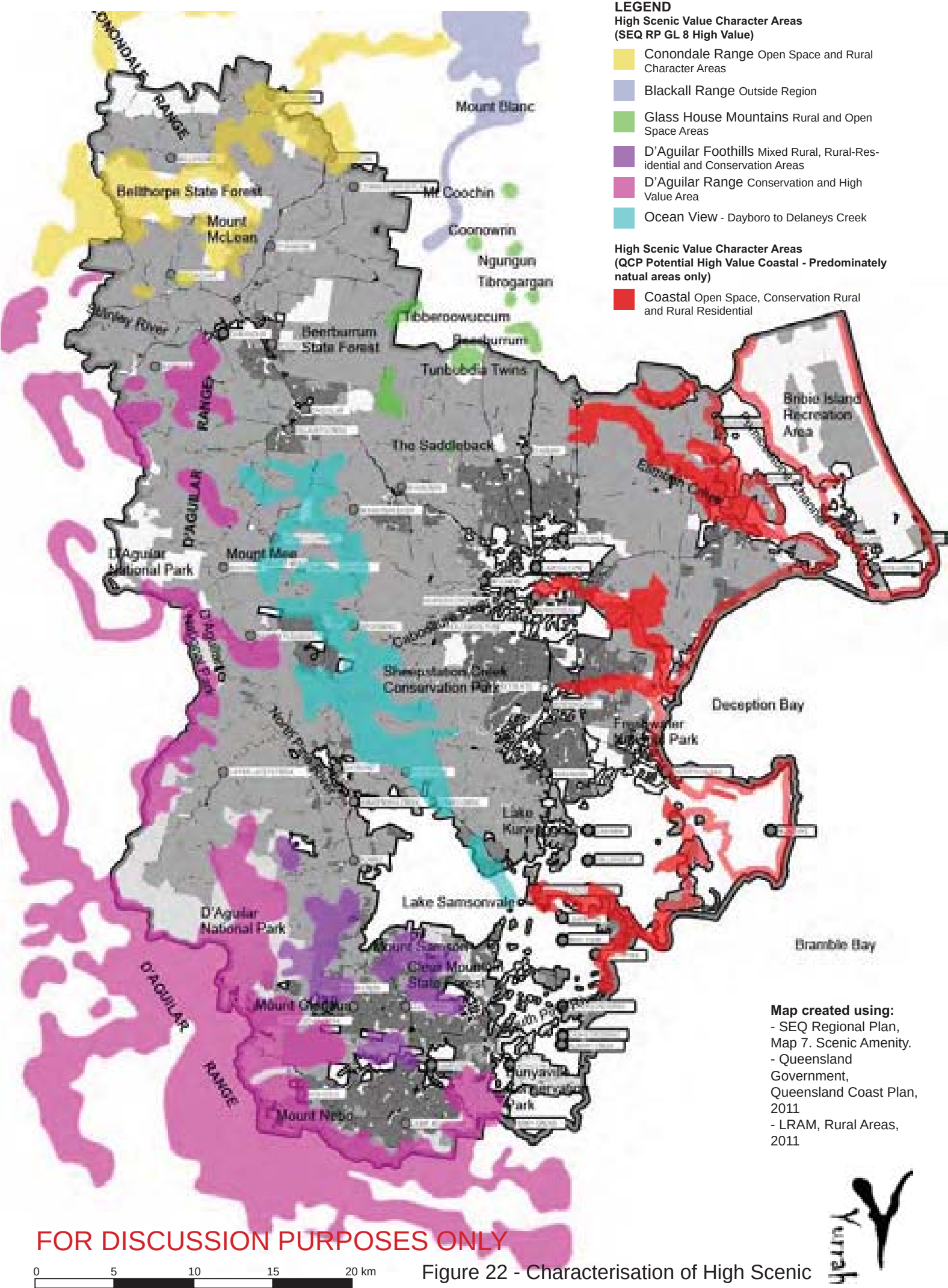


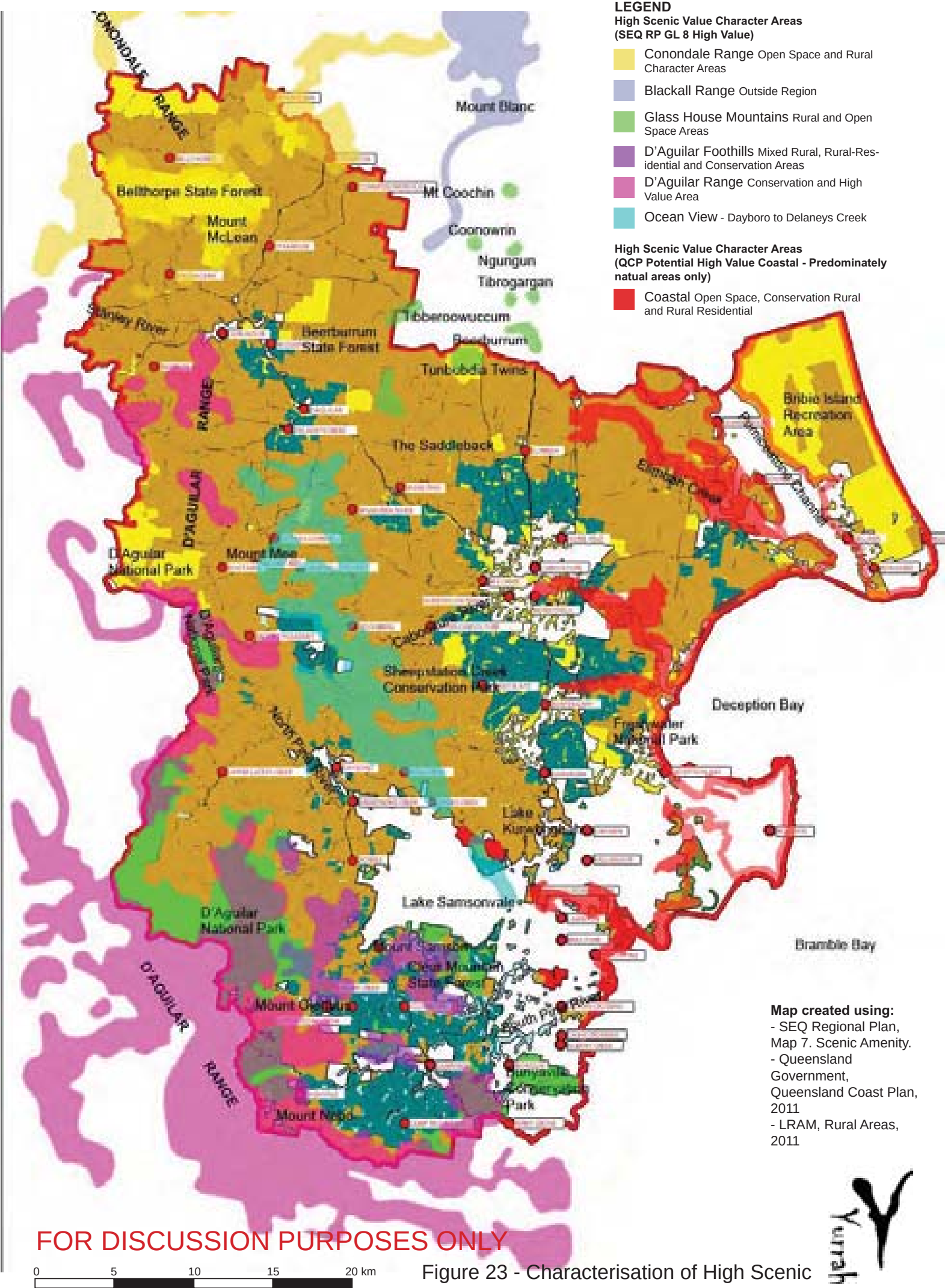
Figure 19

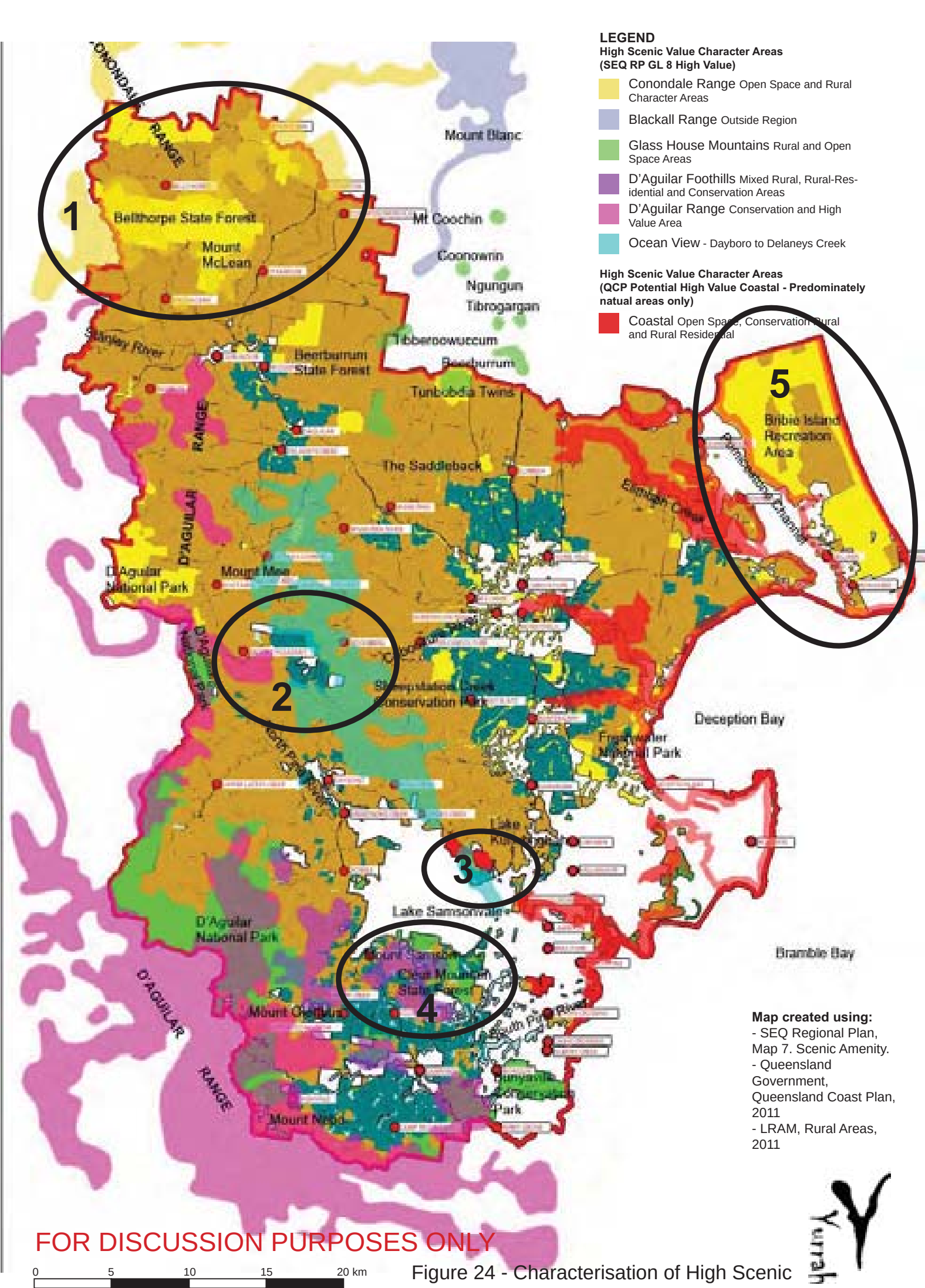
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APPENDIX E

Centres and Economics Report (CChange)



Centres'





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TABLE OF CONTENTS

Executive summary	1
Moreton Bay's Main Rural Centres	1
Potential Economic Development Opportunities	2
Current and Future Employment Structure	3
Conclusion	4
 1 Introduction	 2
1.1 Purpose of Study	2
1.2 CChange's Role	2
1.3 Structure of Document	3
 2 Moreton Bay Regional Council's Vision	 4
2.1 SEQ Regional Plan and the SEQ Rural Futures Plan	4
2.2 The SEQ Rural Futures Strategy 2009	5
2.3 Council's Vision and Economic Development Aspirations	6
2.4 The Moreton Bay Regional Council Draft Strategic Framework (Confidential)	8
2.5 Implications for Moreton's Rural Areas	10
 3 Moreton Bay Regional Council Rural Areas Context	 11
3.1 Communities of Interest	11
3.2 Socio-Demographic and Socio-Economic Attributes	18
3.3 Self Containment	30
 4 Moreton Bay Regional Council's Rural Centres	 32
4.1 Successful Centres and their Attributes	32
4.2 Moreton Bay's Rural Centres' - Current Roles	37
4.3 Current and Future Role of Centres	58
 5 Exploring Economic Development Opportunities	 60
5.1 Current Industry Sectors & their Likely Future	60
5.2 Other Potential Opportunities	60
5.3 Anticipated Future Employment Structure of Rural Areas	76
 6 Conclusions and Recommendations for Strategy	 79
6.1 Moreton Bay's Main Rural Centres	79
6.2 Potential Economic Development Moreton Bay's Main Rural Centres	82
6.3 Current and Future Employment Structure of the Moreton Bay Rural Areas	83
6.4 Conclusion	84

Appendix 1: Minor Centres Description	85
Appendix 2: Broad Expenditure Analysis	86
References and Bibliography	88

Disclaimer

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Executive summary

In October 2011, Buckley Vann Town Planning Consultants Pty Ltd together with LRAM, CChange Sustainable Solutions Pty Ltd, Bligh Tanner, BMT WBM and Yurrah were commissioned by Moreton Bay Regional Council to complete the Moreton Bay Rural Areas Strategy.

The purpose of the study was to address the SEQ Regional Plan and SEQ Rural Futures Strategy.

CChange's role in the Rural Areas Strategy was to:

- Clearly identify the role and function of the Region's rural centres;
- Identify and describe the current and anticipated employment structure of the rural areas; and,
- Identify opportunities to further develop rural enterprises.

CChange was requested to concentrate on centres in the western rural areas in the Moreton Bay Region and on the economic development potential for new opportunities, such as tourism and other elements noted in the Council's EDS. LRAM, a core component of the consultant team, are expert in rural lands and rural industries and therefore part of their role was to determine how value can be added to existing and future primary production.

Major findings and recommendations are noted below.

Moreton Bay's Main Rural Centres

Based on the research and analysis conducted as part of this report it is clear that Moreton Bay's rural centres – Woodford, Dayboro and Samford - are a highlight of the Region. The main rural centres are currently fulfilling roles that are conducive to their main catchment areas and can be described as successful rural towns/centres. They each have a unique identity and a very strong sense of community. In varying capacities, each centre has:

- An appropriate mix of retail goods and services, with all centres placing a high value on customer service/experience;
- Service sector tenancies that cater for the local market;
- Are considered the cultural and community heart of the community to which they primarily serve;
- Have key focal point/s for community meetings and events;
- Include many appropriate community and government services;
- Are attractive, safe and inviting and have recreation, leisure and (to varying degrees) entertainment opportunities;
- Are generally legible and safe and have a focus on placemaking (although some could be improved in this regard); and,
- Incorporate the area's broader history.

The tourism element of each of the centres could be improved, and the housing mix could be diversified to cater for aging or young adult households.

A summary of how each centre 'scored' in relation to the above dot points is listed in the table below. In addition, improvements that would benefit the Centres are also noted. The improvements noted could be influenced through Local Area Plans for the Centres, and there may be some land use implications from arising actions.

Summary of Moreton Bay Rural Area's Centres

Criteria	Woodford	Dayboro	Samford
An appropriate mix of retail goods and services, with a high value on customer service/experience	✓✓✓	✓✓	✓✓✓
Service sector tenancies that can cater for the local market	✓✗	✓✗	✓✓
Be considered the cultural and community heart of the community	✓✓✓	✓✓✓	✓✓✓
Key focal point/s for community meetings and events	✓	✓✓✓	✓✓✓
Appropriate community and government services	✓✓	✓✗	✓✓
Attractive, safe and inviting recreation, leisure and entertainment opportunities	✓✓✗	✓✓	✓✓✓
Legible and safe street and tenancy layouts that have a focus on placemaking	✓✗	✓✗	✓✓
A tourism element	✓✗	✓✗	✓✓
History incorporated	✓✓	✓✓	✓✓
Caters for a variety of households	✗	✗	✗

Summary of Opportunities to Enhance Moreton Bay Rural Area's Centres

Improvements that would benefit the Centres		
Woodford	Dayboro	Samford
- The development of well defined meeting areas / public spaces could be provided. Currently many community groups use the cafes for meetings. Further exploration regarding requirements would be useful - Pedestrian and parking safety is an issue. - Recreation, leisure and entertainment needs improvement - Some services are provided, but potentially room for expansion here - Placemaking a focus, but could be further improved - Amenity improvements to soften the façade of the Woolworths - With regards to Tourism, the centre is considered a 'stop off' when passing through to festivals or other events, rather than a tourist attraction in itself. Improvements required in tourism and marketing. - Some residential, but not a diverse mix. Detailed investigations of region's needs has been prepared by Buckley Vann.	- A range of retail goods and services are provided in the centre. Further diversity would benefit the centre. - Some services are provided, but potentially room for expansion. - Some community and government services provided. Further investigation would be required to determine whether adequate for population. - Road legibility an issue - Could improve tourism elements – has some attractions, but needs further ones. Needs marketing. - Some residential, but not a diverse mix. Detailed investigations of region's needs has been prepared by Buckley Vann.	- Good level of community spaces and services provided, but few government services. Adequacy of government services would require in-depth investigation. - Legible layout but pedestrian crossings could be provided to assist centre functioning. - Anecdotal information suggests good day tripper patronage. However, - more marketing could assist. Investigation of the introduction of local markets would be worthwhile - Some residential, but not a diverse mix. Detailed investigations of region's needs has been prepared by Buckley Vann.

Broad floorspace analyses conducted for the study indicated that there is ample floorspace at most of these centres now and into the future. Dayboro has some scope for increasing floorspace. Any additional floorspace would be best placed if directed towards tourism and non-essential food tenancies. For Woodford and Samford it is unlikely that more floorspace will be required at the Centres even at 2031. Overall, it is recommended that the centres' roles and floorspace remain as they were in 2012.

Potential Economic Development Opportunities

Much research and analysis was conducted for this report to determine the potential economic development opportunities for Moreton Bay's Rural Areas. All economic development opportunities explored kept Council's EDS vision in mind: *foster[ing] a vibrant, sustainable and knowledge-driven economy that creates valuable employment for residents, protects the region's high quality of life and provides a prosperous future for all residents.*

The framework utilised to determine potential opportunities for the rural areas included ensuring that:

- Industry recommendations supported the principal of promoting profitable and sustainable rural industries;
- Recommendations can assist Moreton Bay diversify its economic development base in a way that assists self contained;
- The skills and attributes of the workforce required to optimise the economic development opportunities in Moreton Bay are either present or are considered developable;
- The infrastructure required to ensure that opportunities can be maximised is planned or provided; and,
- All recommendations made enhance and protect the vibrant lifestyle and unique identity of the Moreton Bay Rural Council.

The investigations completed clearly showed that Council need to devote resources into developing economic development opportunities for Moreton Bay's Rural Areas if they wish to maintain, let alone increase employment in the region. This is particularly the case given the expected decline of the current rural industries (refer LRAM's report).

Recommendations for Council regarding economic development opportunities include investigating in detail opportunities associated with the following. In addition, investigation into appropriate types of home based businesses and their requirements is recommended. Land use implications of proceeding with industries noted below should be highlighted in the investigations;

- Clean energy initiatives, both generally across the rural areas, and specifically to assist businesses in rural industries that are in decline. Land use implications are likely to be ensuring that appropriate areas can flexibility cater for clean energy initiatives;
- Tourism initiatives, particularly focussing on: the main rural centres of Woodford, Dayboro and Samford; establishing further boutique bed and breakfasts, 'farm stays'; other rural experiences such as agro-eco-friendly tourism such as 'working farms or value adding'; potentially investigating the wine industry; and, growing the festivals and events market in the Region with a particular emphasis on lifestyle and rural events. Land use implications include ensuring that tourism operations can be operated in appropriate areas;
- The potential and likely success for the rural areas to host transport and logistics infrastructure (although as noted in the main body of the report, even if this sector is successful, the employment outcomes are not likely to be significant given low employment densities of such uses). Investigations into the location of further appropriate industrial land would be required;

- Other opportunities associated with attracting FI/FO workers or the building manufacturing sector could also be investigated. However, as noted in the body of the report, major employment and economy gains to the rural areas are not expected unless there are considerable population increases (for FI/FO opportunity) or increases in industrial land (for building manufacturing sector).

In addition to the above it is recommended that Council consider:

- Developing a Tourism Strategy for the Rural Areas, and linking this to the broader Moreton Bay Region. The Strategy would need to determine key markets and key attractions such that the focus on the identity and lifestyle attributes of Moreton Bay is preserved and enhanced;
- Undertaking a Branding and Marketing Strategy for the rural areas, with an emphasis on the main Centres as well as other tourism attributes;
- Develop the main Centres to reach their potential as suggested in the preceding section.

Current and Future Employment Structure

Section 3 outlines the current structure of Moreton Bay's rural areas in detail. In summary Woodford and surrounds employment base is focussed in agriculture and public administration and safety, and the other rural areas are more diverse. Dayboro and surrounds have a variety of sectors employing its residents including electricity, water and waste services and construction while Samford had more residents employed in professional, scientific and technical services, information media and telecommunications and financial and insurance services. The Coastal areas had a mix of many industries.

LRAM's report shows that the rural sector that currently underpins Moreton Bay Region's Rural

Areas, and particularly Woodford and surround's economy, is in decline and future prospects for this sector seem bleak. A decline in the employment opportunities for the rural sector would substantially change the employment structure of the rural areas – particularly Woodford. Unless significant employment prospects are provided, the best case scenario is that many of the employed residents in the rural areas will need to secure jobs in the urban areas of Moreton Bay, and the worst case scenario is that unemployment will increase.

Analysis of the 2006 ABS Census 'occupation by age group' also adds a compounding issue for the rural areas. In 2006 a high proportion of people in various occupations, particularly managers in Woodford (which are likely to be managers of agricultural operations) were over the age of 55. Given that the 2006 Census is now 5 years old, it is likely that a high proportion of these people are either retired or close to retiring. If the rural areas cannot attract people to replace these retirees, then further impacts on the employment base will result. In addition, the ageing of the population in the rural areas is likely to have considerable impact on the demand for social and community services.

Given the above trends and likely results, it is recommended that:

- Council complete a social and community needs assessment for the Rural Areas;
- Verification of the 2011 employment structure of the rural areas is undertaken when the 2011 ABS Population and Household Census data is released;
- Accessibility between Council's rural areas and urban employment nodes is maximised; and, importantly,
- Council place a high value on completing a comprehensive economic development strategy for the Rural Areas of Moreton Bay such that the likely decline in employment opportunities can be replaced and further employment opportunities be provided.

Conclusion

In conclusion, there are many strengths associated with Moreton Bay Region's rural areas. The main centres are highlights of the regions and there are opportunities to strengthen these further. The main centres' tourism components could be further capitalised upon and the placemaking focus emphasised. If this was to occur, further value to the economy of the rural areas could result.

However, the agricultural industry, which features strongly in some parts of the rural areas, is in decline and thus diversification of employment is required. Currently, no significant additional employment initiatives are foreshadowed in the rural areas for the near future. Given the likely loss of employment opportunities associated with the agricultural industries in the region and the dearth of current existing opportunities for new employment opportunities in the rural areas, ensuring that the following occurs should be high priorities for Council:

- The Main Centres are working optimally and are promoted appropriately;
- The social and community infrastructure needs are assessed and where necessary provided for;
- Access between employment nodes in the urban area and residents' locations in the rural areas is maximised; and,
- Alternative economic development opportunities for the rural areas are investigated in detail.

1 Introduction

In October 2011, Buckley Vann Town Planning Consultants Pty Ltd together with LRAM, CChange Sustainable Solutions Pty Ltd, Bligh Tanner, BMT WBM and Yurrah were commissioned by Moreton Bay Regional Council to complete the Moreton Bay Rural Areas Strategy.

1.1 Purpose of Study

The purpose of the study was to address the SEQ Regional Plan and SEQ Rural Futures Strategy, with particular regard to:

- Clearly identifying the role and function of the region's rural areas, including the rural townships in those rural areas;
- Expanding and applying the concept of place types contained in the NGP handbook to the rural areas of Moreton Bay Region;
- Identifying and describing the current and anticipated residential and employment structure of the various place types within the study areas;
- Identifying opportunities to future develop rural enterprises particularly where they add value to existing and future primary production;
- Recognising the role of biodiversity values and the natural environment and identifying opportunities to protect and restore these values in the study areas;
- Identifying any 'rural precincts' (as provided for in the SEQ Regional Plan); and,
- Providing recommended implementation strategies for future development that take into account strategic direction regarding the role and function of the rural study areas.

1.2 CChange's Role

CChange's role in the study was to contribute to:

- Clearly identifying the role and function of the region's rural centres;
- Identifying and describing the current and anticipated employment structure of the various place types within the study areas; and,
- Identifying opportunities to future develop rural enterprises.

At the inception meeting, the Council clarified that the analysis associated with the Region's rural centres was to concentrate on the western rural areas in the Moreton Bay Region. It was noted that the rural centres in the coastal areas were to be described but no analysis of them was considered necessary.

With regard to future rural enterprise opportunities, although the brief noted economic development opportunities were to focus on how value could be added to existing and future primary production industries, CChange was asked to concentrate particularly on the potential for opportunities such as tourism and other elements noted in the Council's EDS. LRAM, who is a core component of the consultant team, are expert in

rural lands and rural industries and therefore part of their role is to determine how value can be added to existing and future primary production.

This report provides CChange's input into the final report for the Moreton Bay Rural Areas' Strategy.

1.3 Structure of Document

The report is structured as follows:

- Following the introductory section, **Section 2** provides the policy context with an emphasis on the Moreton Bay Regional Council's Vision. Included in this section are relevant extracts from the SEQ Regional Plan, Rural Futures Strategy, Council's overall vision for the Local Government Area, Economic Development Aspirations, goals with regard to self containment and their recently prepared draft strategic framework. The implications for Moreton Bay's Centres and Economic Report are noted;
- The context for the Moreton Bay Regional Council Rural Areas is provided in **Section 3**. In this section communities of interest are discussed, as are pertinent socio-demographic and socio-economic attributes, major employers and employment nodes, statistics on self containment at 2006 and Moreton Bay's Rural Centres. Information in this section is based on the most recent ABS Population and Household Census (2006), and information collected in December 2011 on land use in Moreton Bay's Centres;
- **Section 4** analyses the centres servicing Moreton Bay's rural areas. To put this into perspective a brief overview of what constitutes a successful rural centre is provided. The current roles of the centres servicing the rural areas are discussed and a summary of strengths and opportunities are outlined with regard to the criteria for successful centres. Recommendations regarding future roles and floorspace are noted;
- Economic development opportunities are discussed in **Section 5**. This section highlights opportunities associated with industry sectors indicated in Council's Economic Development Strategy and other opportunities as defined through consultation; and,
- **Section 6** concludes the report by outlining recommendations for the Moreton Bay Rural Areas Strategy. Recommendations are divided into CChange's 3 focus areas as defined in Section 1.2.

2 Moreton Bay Regional Council's Vision

2.1 SEQ Regional Plan and the SEQ Rural Futures Plan

The South East Queensland Regional Plan 2009-2031 (SEQRP) was developed by the Queensland Government as a response to the rapid growth in the region. Its aim is to manage population growth in the region while protecting the environmental assets, lifestyles and rural localities. The Vision of the SEQRP is to ensure that SEQ is a region of *“interconnected communities, with excellent accessibility and an extensive and efficient public transport system that contributes to reducing greenhouse gas emissions”*.

The Desired Regional Outcome No: 5 in the SEQRP relates to Rural Communities. Its aim is to ensure that rural communities are strong and viable with sustainable economies contributing to the health, wealth, character and liveability of the region.

The SEQRP recognises that regional growth will require some land use change. However, an important element of the Plan is to ensure that regional growth and land use change occurs in such a way to increase rural production and protect regional landscape values. The SEQRP notes that key ways to achieve positive results in rural growth include ensuring that:

- Rural industries that are profitable and sustainable are promoted;
- Diversified economic development opportunities for rural communities are supported;
- Awareness of the interdependence between rural and urban communities is improved;
- On-farm water use efficiency and vegetation management is improved;
- Rural infrastructure that assists the functionality of the rural communities is available; and,
- The delivery of government services to effective rural communities is improved.

The general strategic directions of the Regional Plan highlight the importance of protecting rural areas from the encroachment of urban development and further fragmentation by rural residential subdivisions. Supporting rural production to generate a diversification of rural industries is also noted as enabling the preservation of key inter-urban breaks between residential growth areas. It is the aspiration of the Regional Plan that growth associated with the rural areas is consolidated within and immediately adjacent to rural townships.

A large component of the Moreton Bay area is included within the Regional Landscape and Rural Production Area of the regional plan. This designation aims to protect certain areas from inappropriate development, including urban and rural residential development.

The southern portion of the Moreton Bay area is also included within the Rural Living Area, as designated by the Regional Plan. Rural Living areas have been identified as

being suitable for further rural residential development, primarily through infill and consolidation measures.

2.2 The SEQ Rural Futures Strategy 2009

The South East Queensland Rural Futures Strategy 2009 (SEQRFS) is a part of the SEQRP. The SEQRFS illustrates the Queensland Government's agreed long term direction for the growth of rural areas in SEQ. The strategy aims to ensure that key initiatives are directed in such a way that rural landscapes are healthy and productive, and support profitable and sustainable rural industries and communities, whilst still protecting environmental values. The key themes in the SEQRFS are the same as those elements noted earlier in the SEQRP. That is:

- Promoting profitable and sustainable rural industries;
- Supporting diversified economic development opportunities;
- Raising awareness of inter-dependencies between rural and urban;
- Developing infrastructure;
- Improving government service delivery;

The SEQRFS includes a 'Rural Futures Action Plan', which identifies a range of actions that build upon existing programs such that the economic and social development of SEQ's rural areas can be more sustainable. Five key themes are included in the action plan:

- Economic development
- Healthy and productive rural landscapes
- Water resources
- Community development
- Leadership and collaboration (the implementation mechanism).

Of particular interest to CChange's centres and economic development report are the areas of economic and community development.

The SEQRFS's economic development 'ambition' is to *"Provide opportunities for rural communities to develop strong economies and benefit fully from regional population growth"*. Among the areas included in the economic development section, those most applicable to CChange's report are:

- Strengthening rural economies;
- Tourism and outdoor recreation¹; and,
- Infrastructure

The ambition associated with the community development component of the SEQRFS is that rural communities with provided with social and economic infrastructure that

¹ It is noted that it was out of scope for CChange to complete social and community infrastructure assessments (including open space and general recreation opportunities). However, a key recommendation of the report is that these assessments be completed to ensure that residents are provided with appropriate infrastructure and that the attractiveness of the Region's Rural Areas is maximised now and into the future.

enhance their quality of life. Key areas that are noted as being able to contribute to this aim include:

- Having a skilled labour force
- Having appropriate social infrastructure
- Providing community-based transport
- Ensuring community wellbeing and safety

The issues and outcomes recommended in Moreton Bay Rural Areas Strategy aim to assist with the above ambitions.

2.3 Council's Vision and Economic Development Aspirations

The Moreton Bay Region Council's vision statement is: *"A thriving region of opportunity where our communities enjoy a vibrant lifestyle"*. The Council's corporate plan Vision is *"A region of opportunity where sustainable communities enjoy work, recreation and lifestyle"*.

The Economic Development Strategy (EDS) developed for Council supports these visions. The vision in the EDS is to *"foster a vibrant, sustainable and knowledge-driven economy that creates valuable employment for residents, protects the region's high quality of life and provides a prosperous future for all residents"*.

Acknowledged in the EDS is the need to ensure that:

- The settlement pattern in Moreton Bay Region is conducive to positive economic development outcomes;
- Activity centres are appropriately planned;
- Knowledge-driven innovative companies are encouraged to locate in the region;
- A highly skilled and knowledge based workforce is present; and,
- Key infrastructure, such as roads, utilities, educational institutions are provided in an optimal way across the Region.

There are a number of specific growth opportunities for Moreton Bay identified in the EDS, which have been based on detailed research and analysis of the social, economic, business and industry drivers and confirmed through consultation with local businesses and partners (MBRC, 2011). These are shown in the Table 1 overleaf.

Given that the EDS has been prepared for the Moreton Bay Region as a whole, and has not focused specifically on the rural areas, additional consultation with Councillors and Council officers was completed to determine their views of other potential rural opportunities. It was noted that the outputs of the consultations were *ideas* for further investigation, and that no detailed research on rural areas opportunities had been completed at the time of consultation. The initiatives highlighted through consultation included clean energy initiatives and Moreton Bay as a 'home' for non-resident workers in the resource industry. Areas noted below in Table 1 that were considered to potentially be suitable to the Rural Areas were food manufacturing, building product manufacturing, and transport and logistics. In addition to these the potential for tourism, which is a strong feature of the SEQRFS economic development aim is also discussed in Section 5. .

Table 1: Specific Growth Opportunities Identified in Council's EDS.

GROWTH SECTOR	HIGH VALUE-ADDING ACTIVITY	WHY MORETON BAY?
Building Product Manufacturing	Metal product manufacturing (Prefabricated steel, structural steel and architectural aluminium manufacturing, non-ferrous pipe fitting manufacturing, metal coating & finishing, non-ferrous metal container manufacturing, steel pipes and tubes, iron & steel casting). Cement, lime, plaster & concrete manufacturing (Plaster product manufacturing, concrete slurry, concrete pipe and box culvert manufacturing). - Glass manufacturing (specialised glass for building industry, medical industry, solar industry). Pre-fabricated building manufacturing (Buildings, garages, sheds, kit homes, waste disposal blocks, etc).	Local and regional demand for product: Strong population growth has resulted in high demand for residential and non-residential building. As a growing region there is an existing local demand for building products to support this growth. Existing skills base: The Moreton Bay region has an existing skilled resident population in the manufacture of building materials. Available industrial land: Compared to Brisbane, the Moreton Bay region has significant sized parcels of available demand for residential and commercial development. Proximity to export infrastructure: The Moreton Bay region is located in close proximity to major export infrastructure such as Brisbane Port and Airport (domestic & international).
Machinery & Equipment Manufacturing	Industrial M&E manufacturing (mining equipment, food processing equipment, specialty pumps / compressors / components, other high-tech industrial equipment). Medical device manufacturing (dental equipment, medical examination equipment, medical tools). Professional equipment manufacturing (digital imaging equipment, optical equipment, scientific measurement equipment). Specialty transportation equipment manufacturing (public transportation equipment, security vehicles, military vehicles, mining equipment). Solar manufacturing (PV modules and panels, PV wafer manufacturing, PV cells).	Established business & supply chain: There is an established machinery & equipment manufacturing base in the Moreton Bay region with supporting transport, services to transport, wholesale trade and input suppliers to support industry growth and specialisation of technology. Existing skills base: The Moreton Bay region has an existing skilled resident population in the manufacture of building materials. Available industrial land: Compared to Brisbane, the Moreton Bay region has significant sized parcels of available demand for residential and commercial development. Proximity to export infrastructure: The Moreton Bay region is located in close proximity to major export infrastructure such as Brisbane Port and Airport (domestic & international).
Food & Beverage Manufacturing	Baked goods (breads, biscuits, etc). Processed foods (packaged foods, frozen foods, ingredients, snack foods, etc). Beverage: (bottling, niche beverage, health food drinks).	Population growth: Product demand for food and beverages is linked to population growth. The Moreton Bay region has a strong regional population growth and demand for manufacture of food and beverage products. Available industrial land: Compared to Brisbane, the Moreton Bay region has significant sized parcels of available demand for residential and commercial development. Established business & supply chain: There is an established machinery & equipment manufacturing base in the Moreton Bay region with supporting transport, services to transport, wholesale trade and input suppliers to support industry growth and specialisation of technology. Proximity to export infrastructure: The Moreton Bay region is located in close proximity to major export infrastructure such as Brisbane Port and Airport (domestic & international).
Professional Services	Professional services (accounting, banking, legal, property). Back office/processing centres (centralised accounting and HR functions, insurance processing, payroll processing). Business customer service centres (NOT outbound call centres, but inbound customer service centres requiring higher degree of skill including IT related industries, engineering, finance). Training centres (IT, engineering, financial, insurance).	Accessibility of skilled workers: The Moreton Bay region has a high proportion of resident workers employed in professional services in the Brisbane CBD. Availability & affordability of commercial space: The availability and affordability of commercial and industrial land (compared to metro areas) is attractive to potential start-up companies or professional service companies looking to relocate some of their 'back-office' operations to more affordable locations. Significant amount of property development & land release: A significant amount of property development & land release in the Moreton Bay region and surrounding areas will create a demand for property professional services.
Transport & Logistics	Distribution centres (for large, national retail chains). Logistics operations (warehousing and distribution operations servicing a variety of clients and customers for both import and export).	Workforce: Large existing workforce with similar skills. Land: Sufficient industrial land with transportation infrastructure, good workforce catchment area. Proximity and accessibility: Proximity to Port of Brisbane for import and access to road infrastructure for distribution.

Important to the Centres and Economic Assessments for the Rural Areas Strategy is Moreton Bay Regional Council's target of 70 percent 'self containment'. Self containment can be defined as the percentage of residents who are employed within the boundaries of a specified area, in this case Moreton Bay Regional Council area.

Council's EDS expects that the 70 percent self containment target will be achieved by focussing on the key strategic sectors noted overleaf, supporting existing businesses, developing its workforce and ensuring that infrastructure that is required for industry growth is provided. Recent studies by AEC (2012) show the immense task associated with achieving this target, and whether the 70 percent self containment target can be reached remains to be seen. Nonetheless having a target is laudable and will assist Council move in the right direction with regard to self containment.

Council understands that the self containment target is a Council-wide target, and that much self-containment will come from developing the urban centres in the Region. Nonetheless, Council aims to ensure that rural area can also assist the target by developing further employment opportunities wherever possible.

2.4 The Moreton Bay Regional Council Draft Strategic Framework (Confidential)

Moreton Bay Regional Council is currently compiling a Strategic Framework that is intended to guide planning and development to 2031. The primary purpose of the plan is to determine:

- The preferred future settlement pattern and location of economic activity of the Region,
- The associated infrastructure required to enable development and service communities and
- How best to protect and enhance of the Region's environmental values.

The Framework takes into account the South East Queensland Regional Plan provisions and the Council's aspirations and vision for the future.

Rural Lands is one of several important themes in the Strategic Framework. The rural land's theme aims to ensure that rural lands and townships are *"protected and enhanced as fundamental and valuable elements of the region's identity and character and as an offering of important lifestyle choices and business opportunities to the Region's residents"*.

There are several strategic outcomes associated with this theme, including rural economy, rural infrastructure, rural communities and rural planning. These themes are provided in the textbox on the page overleaf, and most elements are considered appropriate given the findings throughout this report. If Council are sincere in their use of statements associated with providing opportunities for self containment and employment diversity, then it is recommended that further detailed work on determining the plausibility of economic development initiatives occur, and that enhancements to accessibility between the rural areas and key employment nodes in the urban centres occur.

The Moreton Bay Regional Council Draft Strategic Framework (Confidential)

Strategic Outcome - Rural economy

The rural economy is sustainable, diversified and strengthened.

- (1) Rural enterprises are allowed to diversify, adjust, innovate and value-add in response to changing economic and climate circumstances, in keeping with rural character and identity;
- (2) Council will support business activities allied to and compatible with agricultural production, and rural activities within the rural areas and townships including transport and logistics, rural industries, storage and warehousing where these activities can be directly accessed from the regional freight network, adequately serviced are compatible with the amenity and character of the rural area and townships and do not adversely impact on environmental values.
- (3) Council will require best practise environmental management of poultry industry meat production activities in the region including containment of pollutants from blowers within the site and management of waste to avoid air and water contamination;
- (4) Opportunities to develop industries based on rural tourism, ecotourism, carbon sequestration, green energy production, new agricultural products, sport and recreation, environmental offsets, cultural and heritage values and local arts and crafts are provided;
- (5) Agricultural land close to major population centres is protected;
- (6) Opportunities for self containment and a variety of employment are provided; and
- (7) Rural Precincts are recognised and protected.

Strategic Outcome -Rural infrastructure

Infrastructure is provided to support the rural economy and rural communities.

- (1) The health of drinking water catchments is maintained and improved.
- (2) A reliable water supply provided to rural enterprises and rural communities.
- (3) Water resources are managed and used efficiently.
- (4) Transport services are provided to rural communities.
- (5) Social infrastructure and community services are provided to rural communities.
- (6) The provision of Outdoor Recreation opportunities are provided in rural areas for use by the regional community

Strategic Outcome -Rural communities

Rural communities are strengthened through the delivery of appropriate infrastructure and services and by preventing the intrusion of incompatible development.

- (1) Housing diversity meets the needs of current and future residents.
- (2) New communities are integrated with existing communities.
- (3) Wherever possible, affordable living is promoted through reducing overall living costs including transport and energy by the provision of services, employment and facilities close to where people live.
- (4) Appropriate services and facilities are provided and expanded to service rural communities including social infrastructure and transport.
- (5) Human health is adequately protected from the impact of rural industries and enterprises.
- (6) The unique character of rural towns and villages and heritage places and areas is protected.
- (7) Community wellbeing and safety are protected and enhanced.

Strategic Outcome -Rural planning

Planning promotes sustainable and diverse communities and protects rural areas from encroachment of incompatible activities and land uses.

- (1) Rural character, village character and surrounding rural production capacity is protected.
- (2) Inappropriate fragmentation of rural lands does not occur.
- (3) Conflict between rural enterprises and agricultural activities and non-farming or rural lifestyle residents is prevented.
- (4) Conflict at the urban and rural interface is minimised or prevented.
- (5) Rural townships provide places for rural communities to access employment, services and facilities and different forms of housing and accommodate the future needs of communities.

2.5 Implications for Moreton Bay's Rural Areas

The policy review completed above provides important direction for the centres' and economic development component of the Rural Area Strategy. In short, any recommendations made in the Moreton Bay Region Rural Areas Strategy must ensure that:

- Industry recommendations support the principal of promoting profitable and sustainable rural industries;
- Diversified economic development opportunities that assist Moreton Bay become a thriving region of opportunity and become more self contained are explored;
- The skills and attributes of the workforce required to optimise the economic development opportunities in Moreton Bay are present or are addressed;
- The infrastructure required to ensure that opportunities can be maximised is planned or provided; and,
- All recommendations made must enhance and protect the vibrant lifestyle and unique identity of the Moreton Bay Rural Council.

The above list was utilised as a framework for assessing potential economic development opportunities in Moreton Bay's rural areas in Section 5.

3 Moreton Bay Regional Council Rural Areas Context

3.1 Communities of Interest

Moreton Bay Regional Council is located in South East Queensland (SEQ) and comprises the former Shires of Caboolture and Pine Rivers, and the City of Redcliffe. It is between 20 and 44 km north of Brisbane and has a range of urban and rural communities.

The rural areas in the Council are predominantly on the western side of the Region, with a small component also located in the Coastal communities in the east.

Communities of interest have been identified in order to provide a more detailed analysis of local issues within the study area. The communities of interest were developed based primarily on the consideration of:

- Distinct identities as noted by the location of higher order centres
- The likely primary catchment of the main rural centres;
- Schools and significant community uses that are likely to service the communities of interest;
- Geographic issues and boundaries;
- Features and transport routes; and
- Boundaries of statistical data (such as Collections Districts and Statistical Local Areas).

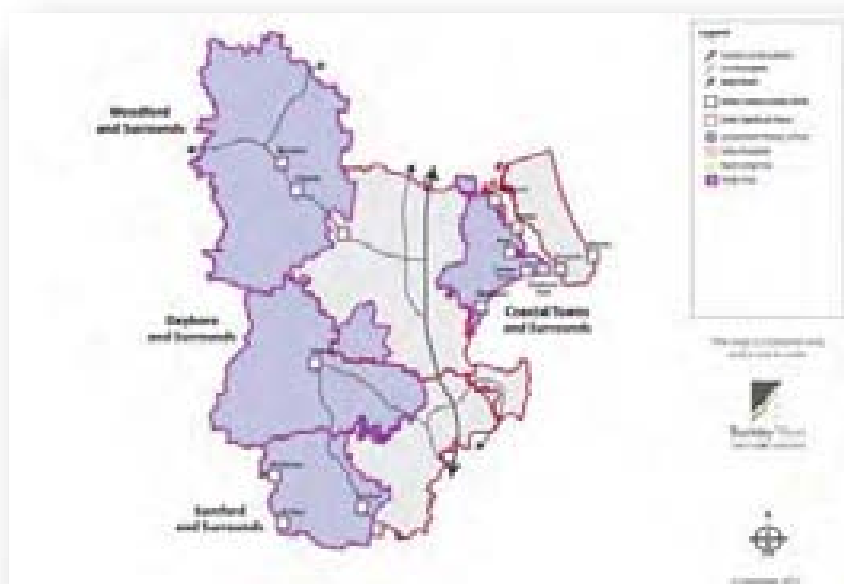
Four communities of interest within the rural study area were developed. These were:

- Woodford and Surrounds;
- Dayboro and Surrounds;
- Samford and Surrounds; and
- Coastal Towns and Surrounds

Figure 1: Communities of Interest Map

Source: Buckley Vann Town Planning Consultants

An introduction to these communities of interest is provided below, and further demographic and economic characteristics are noted in the following section.



3.1.1 Woodford and Surrounds

The Woodford and Surrounds community of interest centres on the Woodford town / Centre, and includes the local centres of D'Aguilar and Wamuran.

Woodford is a rural town located 20 minutes west of Caboolture on the D'Aguilar Highway. The town has wide streets, a grand old hotel, colonial style shops, and has the feel of a traditional rural service centre. Established in 1841, it was one of the earliest settled areas within Moreton Bay Regional Council and its identity is still very much reflective of its history.

Figure 2: Woodford Centre streetscape



Farm lands that produce strawberries, bananas, pineapples and pawpaw are active in this community of interest, and this is prevalent in the ABS statistics showing that agriculture is the main employing industry for the residents of the area (refer Section 3.2.2). It is noted that many of these industries are in decline and LRAM's report provides further information on this issue. In 2012, Woodford's other key employer, employing 350 people, was the Woodford Correctional Centre. Discussions with the Correctional Centre indicated that many people employed in the Centre do not reside in the rural areas of Moreton Bay. More information on the Correctional Centre can be found in Section 3.2.3.

Attractions in Woodford and surrounds include, among other things:

- The Woodford Centre that supports a rural identity and feel;
- The summit of Mount Mee, with its restaurant offering and its panoramic views over the Region to Moreton Bay;

- The Mount Mee state forest, notable for its proximity to Brisbane, its walking tracks, picnic areas and camping sites; and,
- The museum run by the Australian Narrow Gauge Railway Museum Society, which houses the largest narrow gauge steam locomotives in Queensland.

Figure 3: Woodfordia from aerial view



Woodford and Surrounds is also home to Woodfordia, a location that hosts one of Australia's most well known folk festivals 'Woodford Folk Festival'. In recent years other festivals such as 'Splendor in the Grass', and the 'Dreaming' festival have also chosen Woodfordia for their address. There is currently discussion about Woodfordia's potential to host a range of uses at the site, and comments on the benefits and potential costs are provided in Section 4.

Given its traditional rural character, the layout and feel of the Woodford centre and its proximity to beautiful destinations such as Mount Mee and the attractive rural countryside, tourism could be capitalised upon in the future. This is expanded upon in Section 5.

3.1.2 Dayboro and Surrounds

Dayboro has a strong and distinct identity when compared with the other rural areas in the Moreton Bay Region.

There is a strong sense of community in Dayboro, with many of the locals being very proud of all that Dayboro has to offer. Consultation that occurred as part of this study in December 2011 revealed that there are many community events held in Dayboro, and they are very well attended by the local community.

Dayboro is an attractive town less than an hours drive from Brisbane, and anecdotally, many daytrippers make their way to Dayboro either on their way to other areas or

Figure 4: Streetscape in Dayboro



specifically to visit the local butcher, bakery, pub and the tourist information centre (Consultation December 2011).

A main access route to the centre of Dayboro is through Samford. This route has mountain views and a picturesque view of much of Moreton Bay rural areas.

Figure 5: Tourist Information Centre at Dayboro



3.1.3 Samford and Surrounds

Samford Village and its surrounds, located in the south west corner of the rural areas of the Moreton Bay Region have been described as “idyllic pictures of relaxed country living” (Queensland Destinations, 2011). Given its close proximity to Brisbane (approximately 45 minutes drive), Samford can be described as a peri-urban community - a community located on the edge of urban development.

The Samford Village is very well presented with a distinct sense of place. Highly valued by the retail tenancies and its customers in the Village, anecdotal evidence suggests residents within this community of interest value the country feel and personable nature of Samford while still having access to higher order goods and services close by. Key statistics from the 2006 ABS Population and Household Census support this proposition and show that many of Samford and its surrounding residents access their place of employment in Brisbane (refer Section 3.3). Consultation also indicated that higher order centres in Brisbane are used for comparison shopping.

Figure 6: Samford's Farmers Hall and associated streetscape



Quaint craft shops, an art gallery and historical points of interest are located throughout the Village. The historic pub, built in 1906, is a popular place for residents and visitors alike. There are many cafes in the Village that add to the rural yet urban feel, and significant areas are devoted to community uses.

Figure 7: Community oval and stage in Samford Village



Mount Nebo and Mount Glorious, popular tourist locations proximate to Brisbane, are located within this community of interest. In addition, Brisbane Forest Park and Samford State Forest are located on the eastern edge of Samford Village. There are many walks and treks that have high enjoyment and environmental value.

Based on observations of the Centre and consultations with retail tenancies, Samford enjoys a high level of visitation from outside the community of interest boundaries. Most retail tenancies agree that tourism could be further explored in Samford.

Figure 8: Mt Glorious Village



Figure 9: Approaching Mt Nebo



3.1.4 Coastal Areas

The rural areas within the 'Coastal Areas' community of interest are an eclectic mix of settlements, with no defined activity centre/s. The area includes the local centres of Donnybrook, Toorbul, Ningi and Beechmere, and these centres often comprise a minimal number of shops servicing local weekly and/or convenience needs (refer Section 4 for further information).

Analysing the demographics, land use mix, retail activity and employment base of the coastal areas can be described as essentially dormitory suburbs of the more urban areas of the Moreton Bay Regional Council².

Figure 10: Rural Coastal Areas in Moreton Bay Regional Council



² . As noted in Section 1.2, on advice from Moreton Bay Regional Council the centres in the Coastal Areas community of interest, while needing to be described, are not required to be analysed to the same extent as Woodford, Dayboro and Samford.



3.2 Socio-Demographic and Socio-Economic Attributes

The socio-demographic and socio-economic attributes of the communities of interest provide further insights into the character and substance of Moreton Bay Regional Council's rural areas. Key information is provided below and further demographic information can be found in the Housing Report prepared by Buckley Vann.

The information below was sourced from the most recent ABS's Population and Household Census, which is the year 2006. Although 5 years old, the 2006 Census was the most comprehensive information available at the time of writing³. Consultation with Council, employers and employees in the Region verified it is unlikely that there have been significant changes to the characteristics in the rural areas of the Moreton Bay Region since 2006, except, perhaps a decline in employment.

3.2.1 Samford and Dayboro

In 2006, the ABS Population and Household census showed that residents in Samford exhibited a high socio-economic status when compared to Queensland. The same source indicated that Dayboro's residents also exhibited higher socio-economic status compared to Queensland, albeit to a lesser extent than Samford. This was evidenced by Samford, Dayboro and their surrounds having:

- Larger proportions of professionals and managers (Samford 46 percent and Dayboro 32 percent versus Queensland 30) (refer Figure 11)
- Higher median household incomes (Samford \$1670/week and Dayboro \$1300/week versus Queensland \$1033/week) (refer Figure 12);
- Larger proportions of households earning over \$2500/week (Samford 27 percent and Dayboro 15 percent versus Queensland 10) (refer Figure 13) and higher housing loan repayments too (Samford 14 percent spend \$3000/month

³ The 2011 census was not due to be released until at least mid 2012.

- or more on housing loan repayments. The same statistics for Dayboro and Queensland are 7 percent and 5 percent respectively) (refer Figure 14);
- Larger proportions of persons in the labourforce (Samford 75 percent and Dayboro 73 percent versus Queensland 66) (refer Figure 15);
- Larger proportions of households that have 3 or more vehicle (Samford 29 percent and Dayboro 32 percent versus Queensland 16) (refer Figure 16); and,
- A larger proportion of people finishing Year 12 or above (Samford 44 percent and Dayboro 34 percent versus Queensland 32) (refer Figure 17).

Journey to work data indicates that many work people who live in Samford and surrounds work in Brisbane (51%) (refer Section 3.3). However, in addition to more people travelling to Brisbane for work, the proportion of people working from home in Samford is also almost double when compared to Queensland (Samford just under 8 percent and Dayboro 8.5 percent versus Queensland 5 percent) (refer Figure 18).

Combining these statistics with the anecdotal evidence that people are attracted to the areas of Samford and Dayboro for their 'rural feel' and 'personable' interactions (refer Section 2 and Section 4), these areas can well be described as areas hosting 'tree changers'. 'Tree changers' is a term that has become popular in recent years in Australia to describe those from metropolitan cities seeking new life styles and opportunities within Regional Australia. Although 'tree changers' have a variety of characteristics, they are often associated with more established urban couples or families that have recently moved to a peri-urban or rural environment.

3.2.2 Woodford and Coastal Areas

Using the 2006 ABS Population and Household Census, it can be seen that Woodford and the Coastal areas both had lower socio-economic characteristics when compared to Queensland. This was evidenced by Woodford, Coast Areas and their surrounds having:

- A low median household income compared to Queensland (Woodford \$895/week and Coastal Areas \$723/week percent versus Queensland \$1033/week) (refer Figure 12);
- Larger proportions earning \$1400/week and below (Woodford 77 percent and Coastal Areas 75 percent versus Queensland 68) (refer Figure 13), but with lower housing loan repayments too (Woodford 40 percent paying less than \$950/month and Coastal Areas 36 percent paying less than \$950/month versus Queensland 30 percent) (refer Figure 14);
- Lower proportions of people in the labourforce (Woodford 53 percent and Coastal Areas 52 percent versus Queensland 66) (refer Figure 15);
- Smaller proportions of people finishing Year 12 or above (Woodford 21 percent and Coastal Areas 22 percent versus Queensland 32) (refer Figure 17).

However, although similar in some aspects of their socio-economic status, there are considerable differences between the Woodford and surrounds and the Coastal areas and surrounds communities of interest.

As is shown in section 3.2.3, Woodford had a large proportion of its population employed in rural industries in 2006 (12 percent compared to 4 percent for Queensland,

and 20 percent of employment was in the rural sector). Often these industries have lower socio-economic status characteristics, with the exception of a high proportion of managers, people working from home and those owning their own home. The 2006 ABS Population and Household Census verified that these characteristics were present in Woodford and its Surrounds (refer Table 2).

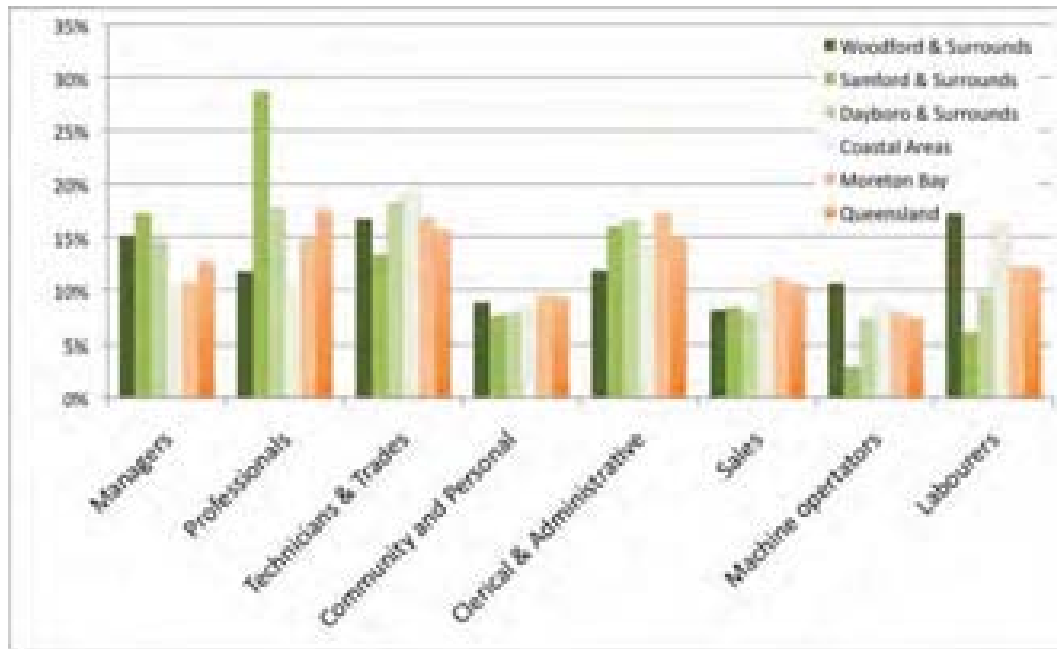
Table 2: Selected Characteristics of Woodfood and Surrounds Community of Interest: 2006

Characteristic: 2006	Woodfood and Surrounds	Queensland
% in Rural Industries	12% residents, 20% employees	4% residents/ employees
Median Household Income	\$895/week	\$1033/week
% people finishing Year 12	21%	32%
% of Managers	15%	13%
% people working from home	9%	5%
% people who own their own home	37%	32%

Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

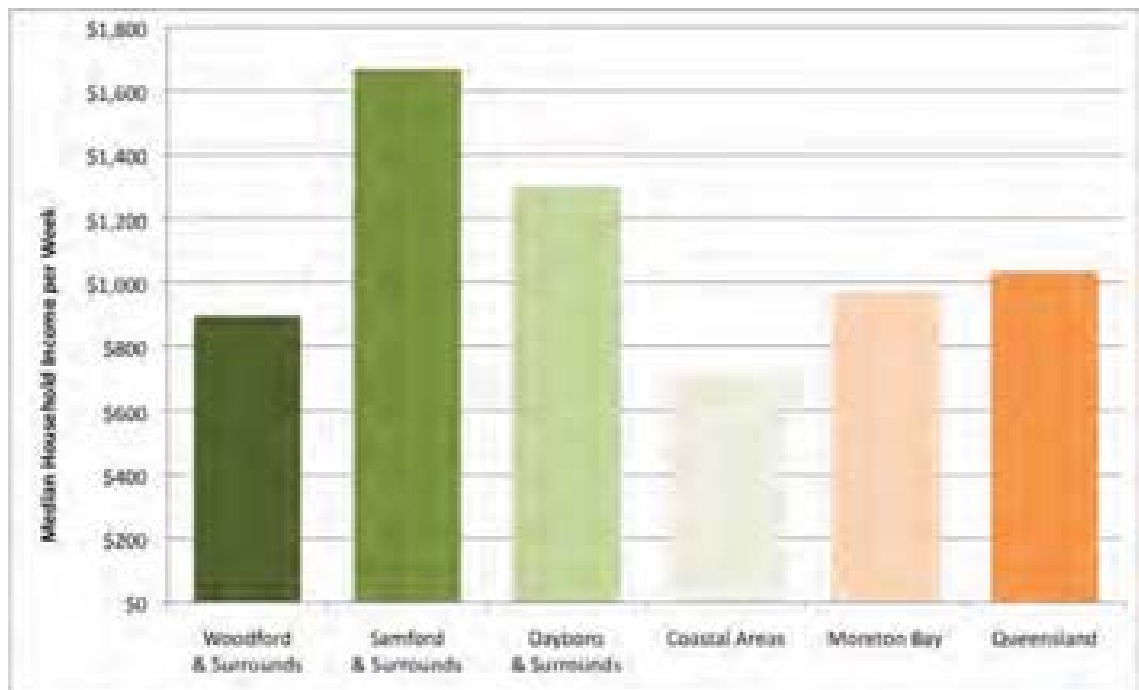
By contrast, the Coastal Areas include a very high proportion of people at retirement age when compared with Queensland (18 percent versus 6 percent for Qld) and a corresponding lower proportion of people in the labour force (52 percent). There were no significant employers in the Coast Areas community of interest in 2006, but rather a diversity of employment (refer Figure 24) that is primarily accessed outside the community of interest (refer Figure 26, over 80 percent of employed residents work outside the Coastal Areas community of interest). A larger proportion of people own their own home in the Coastal areas and surrounds when compared with Queensland (42 percent compared to 32 percent)

Figure 11: Moreton Bay Rural Areas and Queensland: Occupation 2006



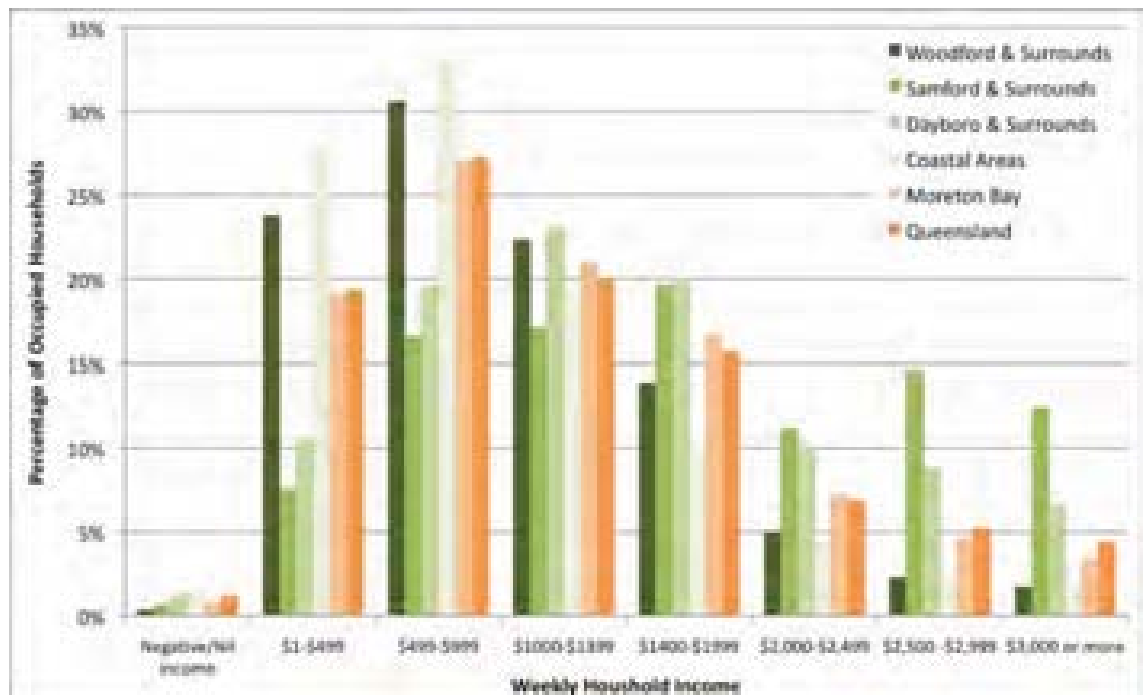
Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

Figure 12: Moreton Bay Rural Areas and Qld: Median Weekly Household Incomes 2006



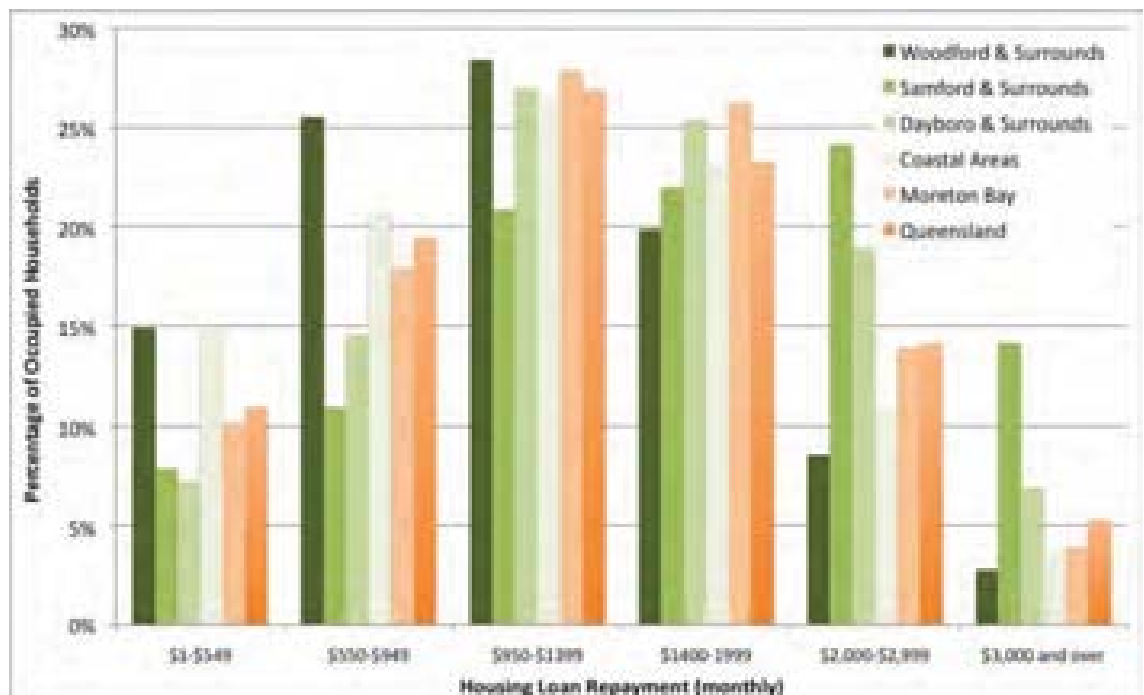
Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

Figure 13: Moreton Bay Rural Areas and Qld: Weekly Household Incomes 2006



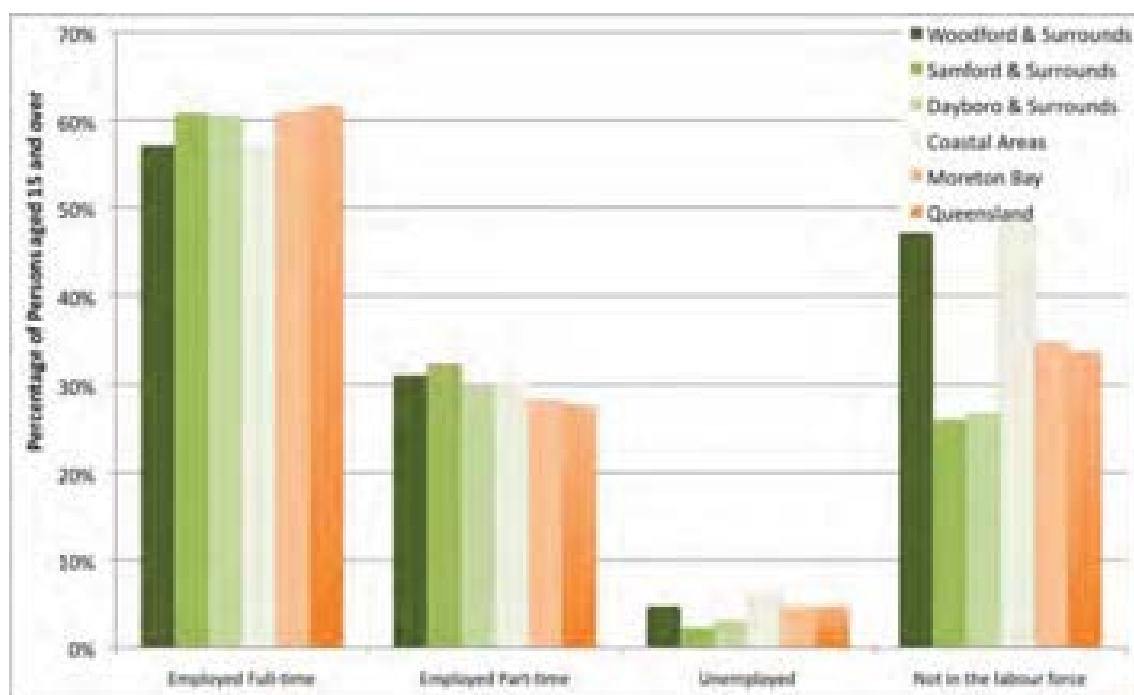
Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

Figure 14: Moreton Bay Rural Areas and Qld: Housing Repayments 2006



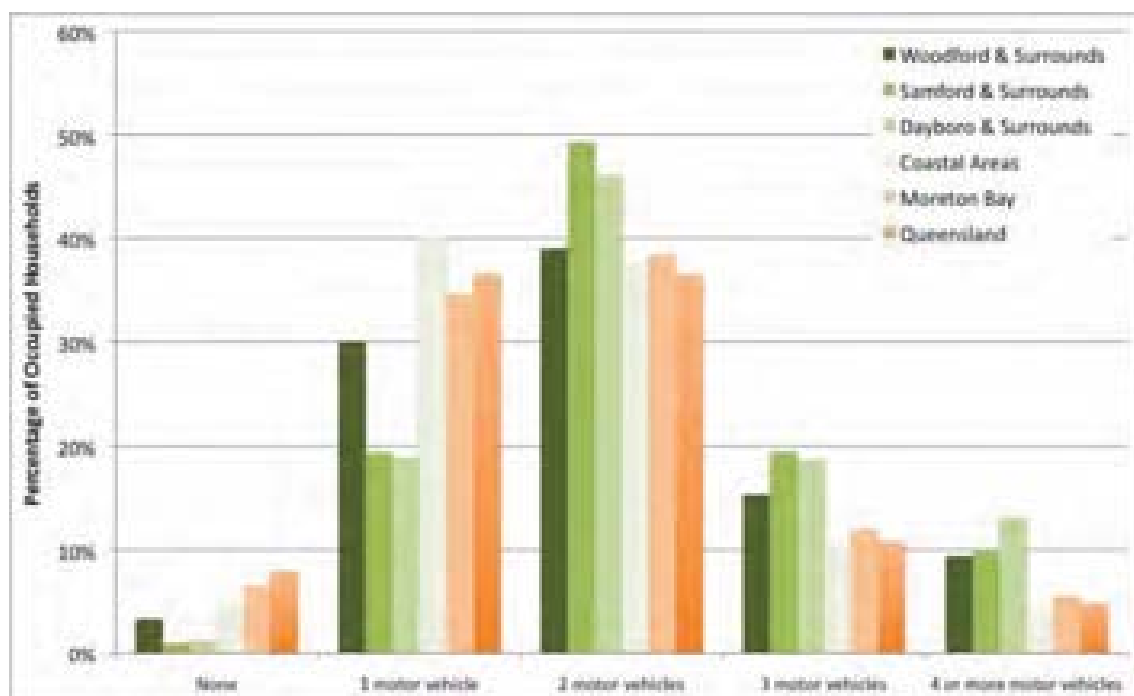
Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

Figure 15: Moreton Bay Rural Areas and Queensland: Labourforce Details 2006



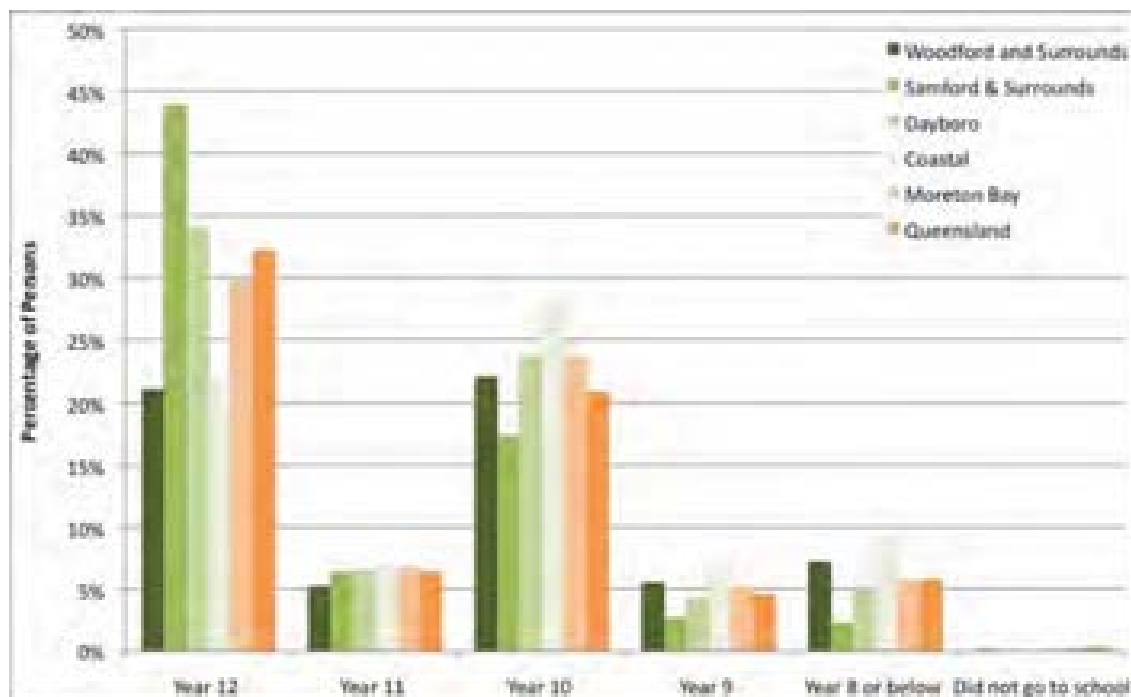
Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

Figure 16: Moreton Bay Rural Areas and Qld: Numbers of Vehicles per Household, 2006



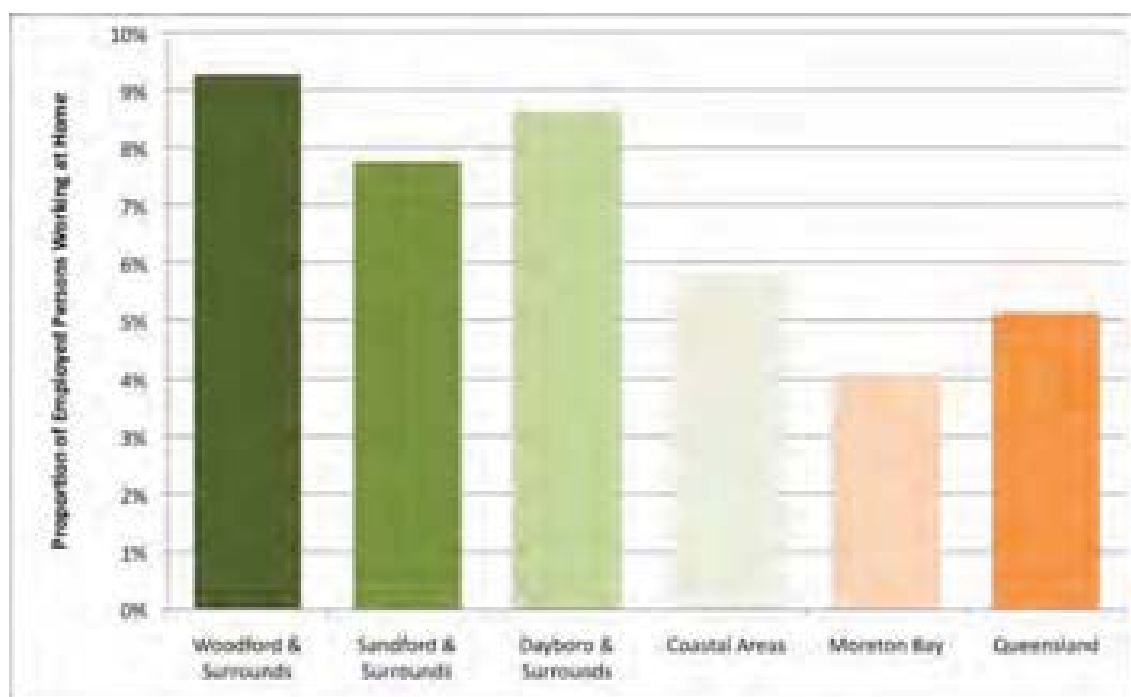
Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

Figure 17: Moreton Bay Rural Areas and Qld: High School Education Attainment, 2006



Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

Figure 18: Moreton Bay Rural Areas and Qld: Proportion Working from Home 2006



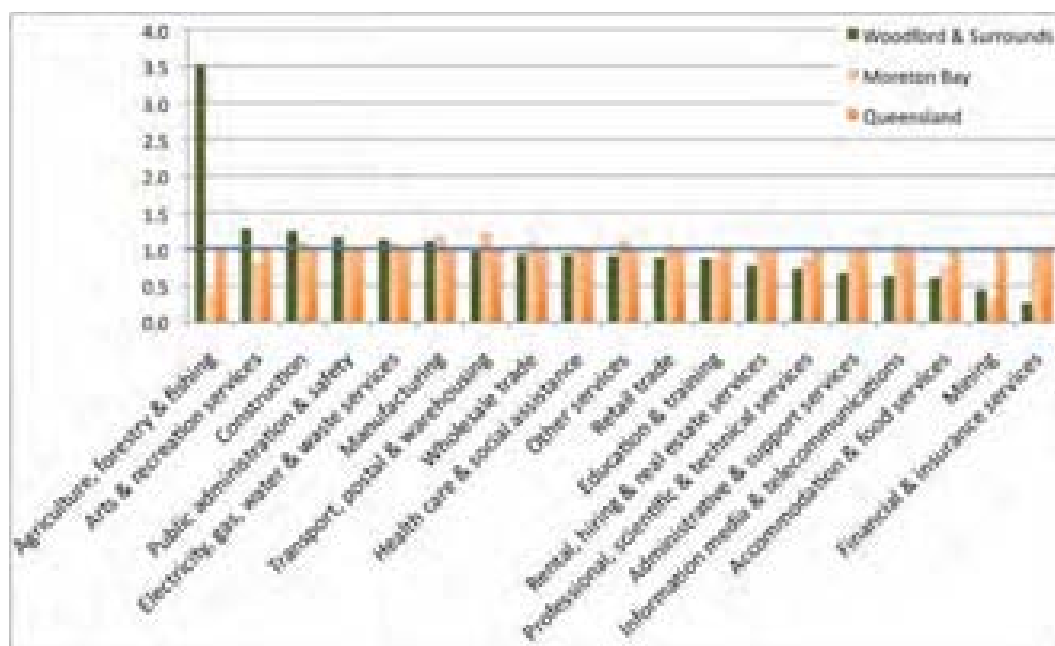
Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

3.2.3 Prominent Industry Sectors and Major Employers

Each community of interest in Moreton Bay's rural areas had a different industry structure. Figures 19, 21 and 22 uses the 2006 ABS Population and Housing Census to show the employment location quotient for each of the communities of interest. An employment location quotient compares the concentration of a resource or activity, such as employment, in a defined area to that of a larger area or base. In the analysis below, the communities of interest usual residents that are employed are compared to the employed residents in Queensland as a whole.

The number of jobs in the communities of interest is also depicted below in Figures 20 and 23. Information used in these graphs were sourced from the 2006 ABS Population and Household Census, using the place of work as the base. The information in these graphs contains information that displays the employment structure within the areas (i.e the jobs in the communities of interest). This employment may or may not be taken up by local residents⁴.

Figure 19: Location Quotient: Industries by Employed Residents in Woodford, 2006



Source: OESR Consultancy Data, From 2006 ABS Population and Household Census, CChange Calculations

In proportional terms, Woodford and surrounds has over 3.5 times as many people employed in agriculture when compared to Queensland (refer Figure 19). As would be expected if people were operating their own family farms, many employed residents in

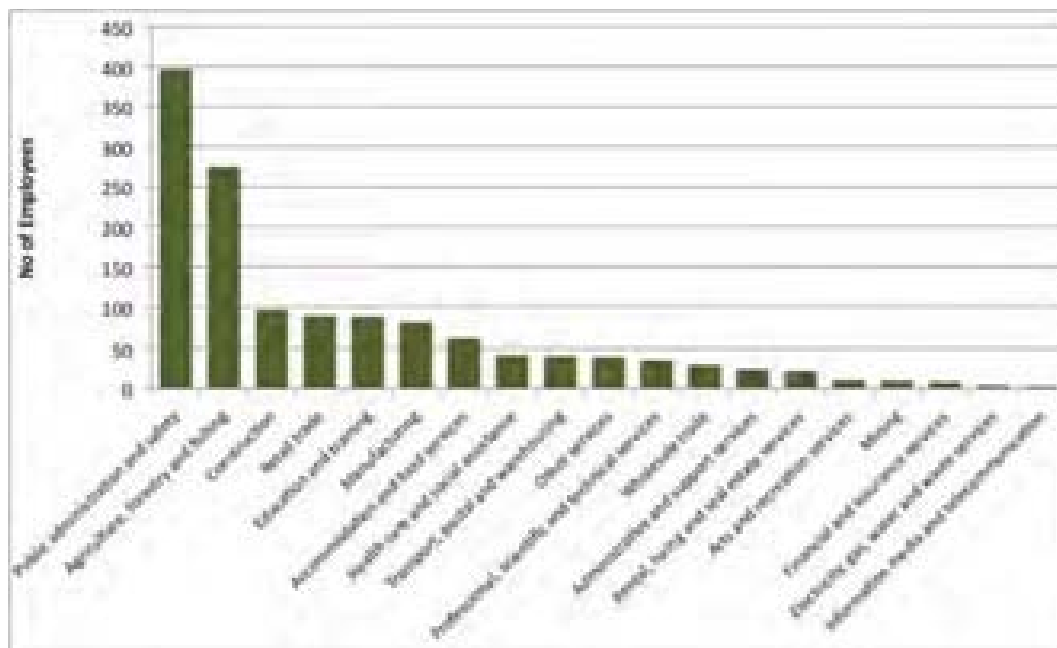
⁴ Given the way place of employment data is constructed by the ABS, the boundaries associated with the communities of interest are slightly different to the other analyses presented in this section. While Woodford and surrounds, and Coast Areas and surrounds are very similar to all other data, Samford and Dayboro and their surrounds have had to be combined.

Woodford work in Woodford (refer Figure 26 in Section 3.3). By comparison, the areas of Dayboro and Coastal Areas have only 1.1 times as many people employed in agriculture when compared to Queensland (refer Figures 21 and 22).

Apart from Agriculture, Forestry and Fishing, there are no other prominent industry sectors in which employed residents in Woodford work. This is interesting given that the Woodford Correctional Centre is one of the major employers in the Region, but understandable given the specialised skills that are required for many of the jobs in the Correctional Centre (for example, psychologists, custodial staff, nurses).

In 2006, the major employers in Woodford (jobs provided in the Woodford area and surrounds) included Public Administration and Safety (397 jobs) (which included the Woodford Correctional Centre hosting 350 jobs) and the rural sector (275 jobs). The number of jobs in Woodford and surrounds in 2006 was 1,376. Consultation with Council indicated that since 2006 there have been no significant additions to the major employers in the Woodford area and surrounds, but that it is highly likely that the employment in the rural sector has declined. This suggestion is supported by a detailed analysis of the ABS Population and Household Census, which showed that in 2006 over 40 percent of managers in the area were 55 and over. In 2011 these people would be 60 and over and it is very likely that at least a proportion of these would have retired.

Figure 20: Employing Industries: Location Woodford, 2006



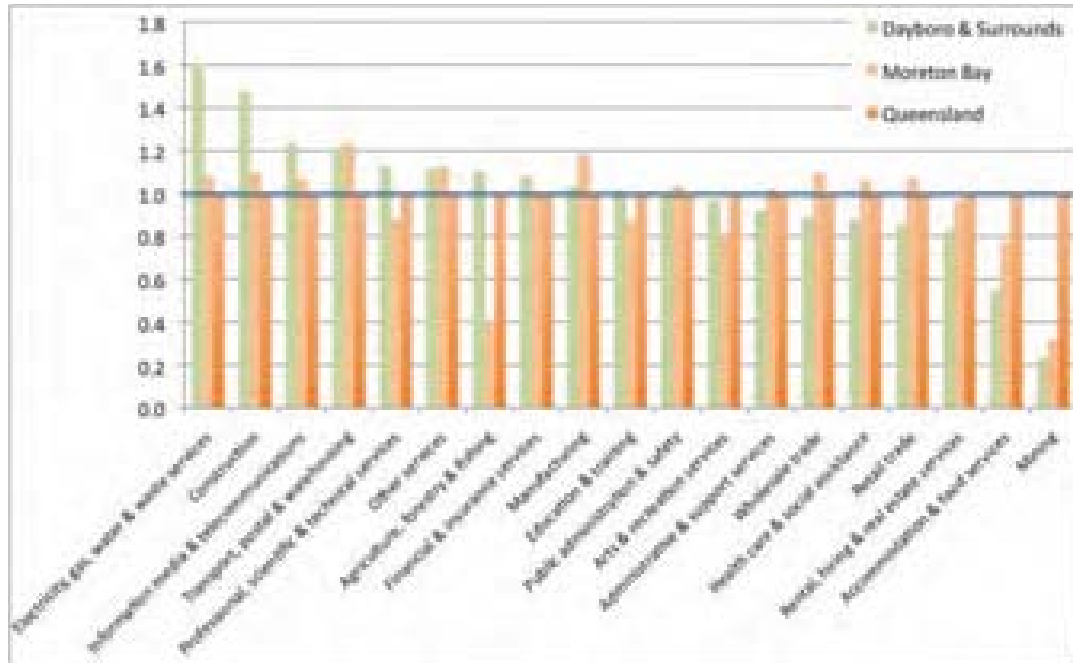
Source: OESR Consultancy Data, From 2006 ABS Population and Household Census: Place of Employment Data

When compared with Woodford, Dayboro has more diversity in the sectors in which the residents are employed. Comparisons with Queensland statistics (refer Figure 21) show higher proportions of Dayboro's residents are working in the areas of 'Electricity, water and waste services' (a location quotient of 1.6) and 'Construction' (a location quotient of 1.5), and to a lesser extent in:

- Information media and telecommunications (location quotient of 1.2);
- Transport, postal and warehousing (location quotient of 1.1);
- Professional, scientific and technical services (location quotient of 1.1);

- Agriculture, forestry and fishing (location quotient of 1.1); and
- Financial and insurance services (location quotient of 1.1).

Figure 21: Location Quotient: Industries by Employed Residents in Dayboro, 2006



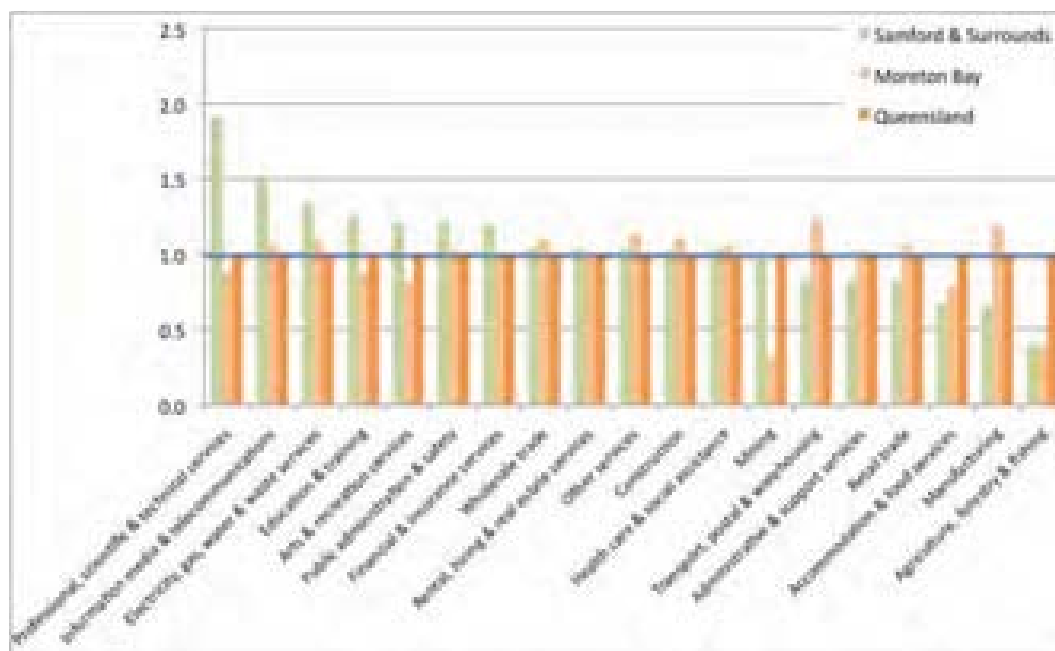
Source: OESR Consultancy Data, From 2006 ABS Population and Household Census, CChange Calculations

Like Dayboro, Samford had a more diverse range of industries in which its residents were employed in 2006 when compared with Woodford (refer Figure 22). As noted earlier, Samford has a higher proportion of professionals in the community when compared to Queensland and the other communities of interest in Moreton Bay Regional Council rural areas. That finding was supported by the following industry sectors having location quotients that were above 1:

- Professional, scientific and technical services (location quotient of 1.9);
- Information media and telecommunications (location quotient of 1.5);
- Financial and insurance services (location quotient of 1.2).

Other prominent industries employing Samford's residents are the sectors of electricity, gas, water and waste services (location quotient of 1.3), education and training (location quotient of 1.2), arts and recreation (location quotient of 1.2) and public administration and safety (location quotient of 1.2).

Figure 22: Location Quotient: Industries by Employed Residents in Samford, 2006

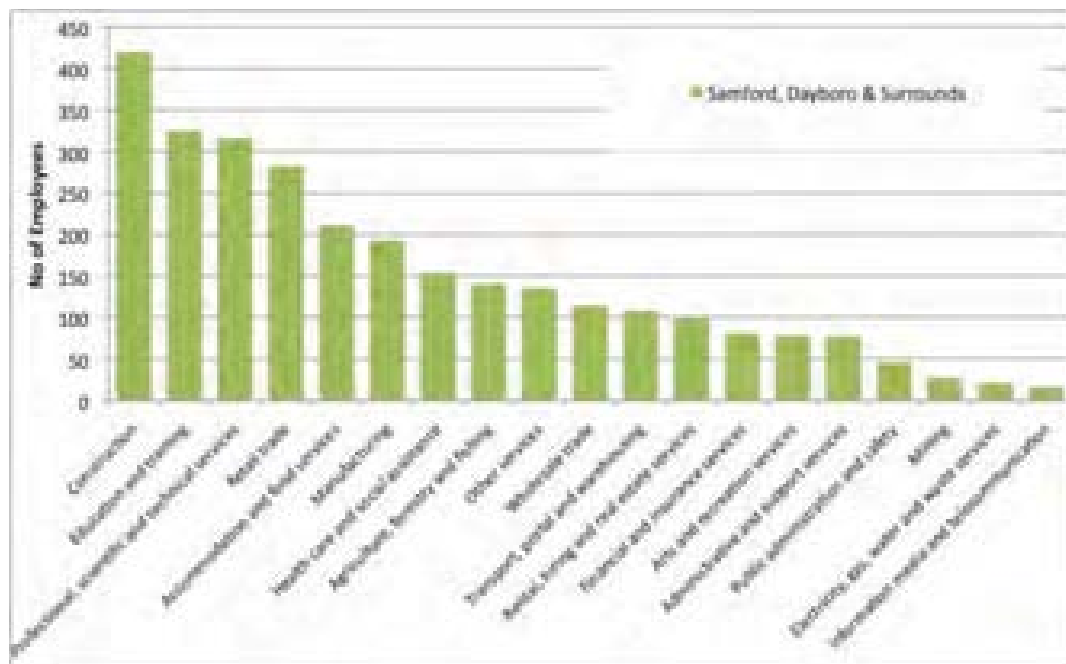


Source: OESR Consultancy Data, From 2006 ABS Population and Household Census, CChange Calculations

Major employers in Samford, Dayboro and surrounds include the following sectors (refer Figure 23):

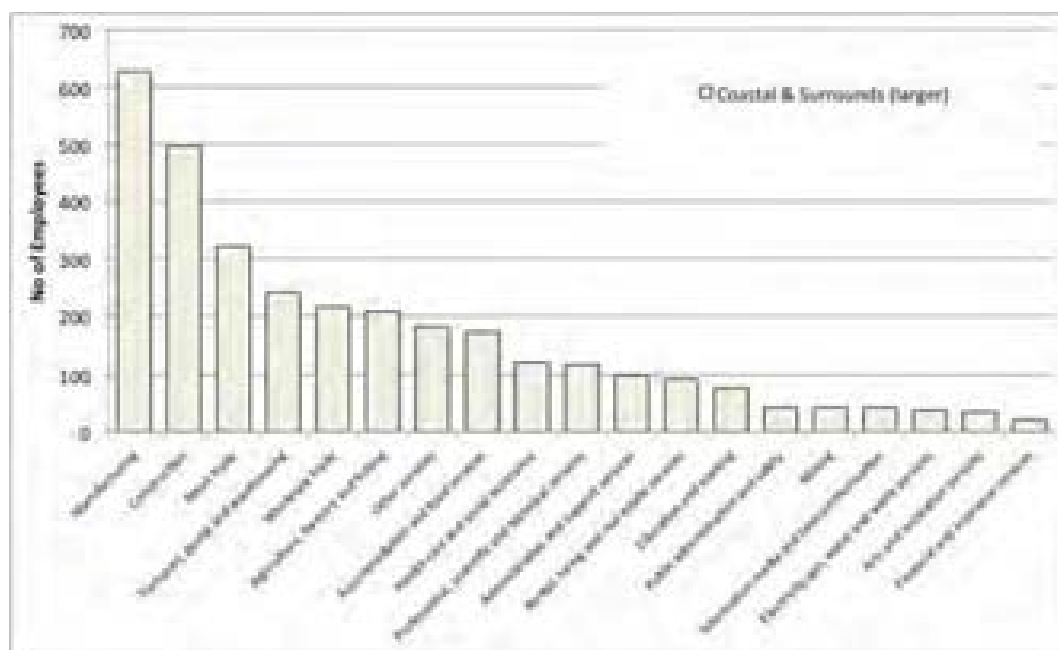
- Construction;
- Education and training;
- Professional, scientific and technical services;
- Retail trade;
- Accommodation and food services; and,
- Manufacturing.

The other industry sectors are also represented in Samford and Dayboro, indicating a diverse range of employment opportunities. In 2006, Samford, Dayboro and surrounds supported approximately 2,911 jobs.

Figure 23: Employing Industries: Location Samford and Dayboro, 2006

Source: OESR Consultancy Data, From 2006 ABS Population and Household Census: Place of Employment Data

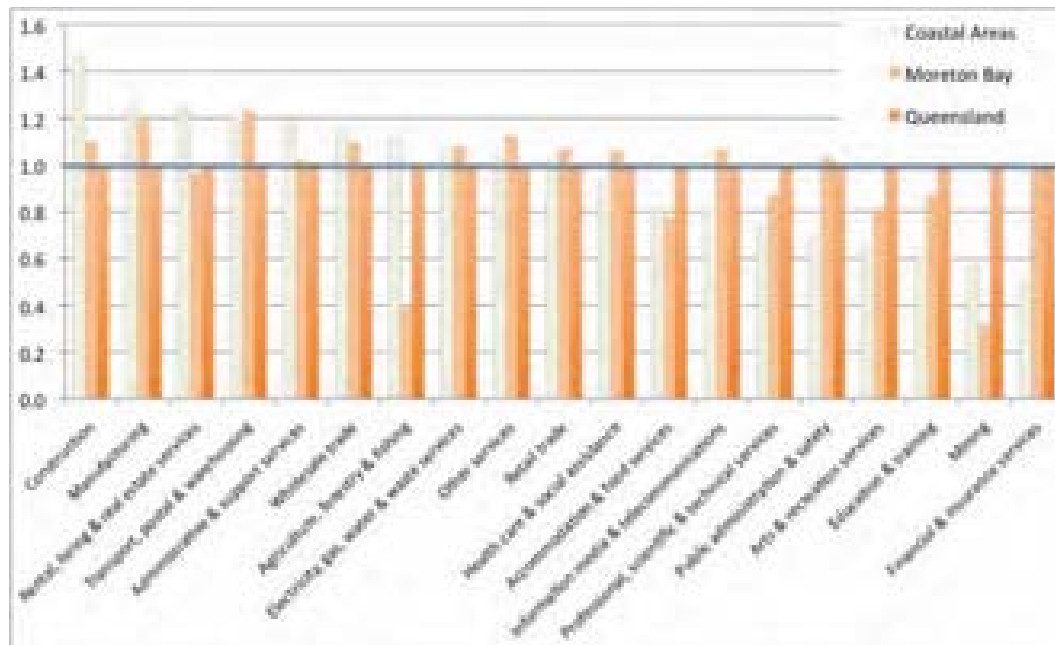
The information produced for employment in the Coastal areas incorporates some of the urban areas of Moreton Bay. As such, the information noted in Figure 24 should be treated cautiously and used only as a guide of the employing industries in the communities of interest. Figure 24 below shows that there is no single prominent industry sector that supports the Coastal Areas. While manufacturing and construction are the highest employing sectors, there is also a representation of jobs in each other industry sector.

Figure 24: Employing Industries: Coastal Areas & Surrounds 2006 – Caution some urban areas included in Statistics

Source: OESR Consultancy Data, From 2006 ABS Population and Household Census, Place of Employment Data

With regard to the employed residents in the Coastal Areas and its surrounds, construction and manufacturing have location quotients higher than one. So too do the industry sectors of rental, hiring and real estate services, transport, postal and warehousing, administrative and support services, wholesale trade, agriculture forestry and fishing, and electricity gas water and waste services.

Figure 25: Location Quotient: Industries by Employed Residents in Coastal Areas, 2006



Source: OESR Consultancy Data, From 2006 ABS Population and Household Census, CChange Calculations

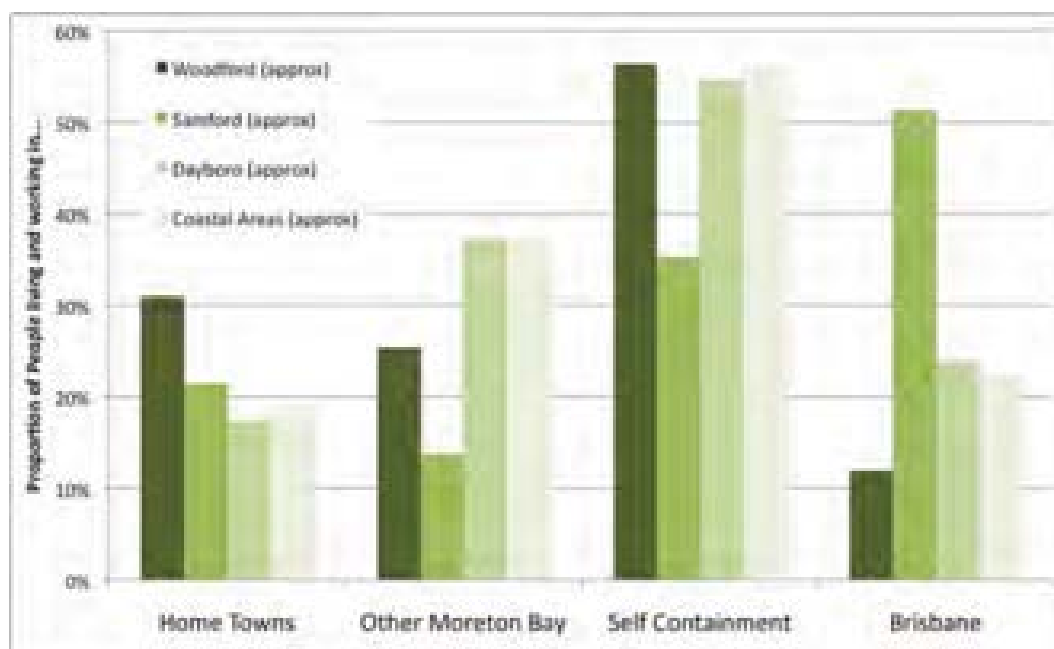
3.3 Self Containment

As noted in Section 2, the Moreton Bay Regional Council has a self containment target of 70 percent. Analysis of data from the 2006 Population and Household Census that compared the number of jobs in an area with the number of employed persons can provide an indication of how well an area is catering for local employment. Information collated by OESR from the 2006 ABS Population and Household Census show that Moreton Bay's rural centres have self containment rates between 35 percent (Samford) up to around 55 percent (Woodford, Dayboro and Coastal Areas) (refer Figure 26). Given the declining existing rural sector, and the need for further investigation to ensure major employment is attracted to the rural areas (refer Section 5 for discussion), the rural areas' contribution to Council's target of increasing its self containment rate is a challenge indeed.

Within the self-containment data set, analyses showed that in 2006 over 30 percent of Woodford's employed residents also worked in Woodford (depicted in Figure 26 as 'Home Town'), where as between 18 percent and 21 percent of the other areas had a 'Home Town' employment base. As was noted earlier in this report, Samford residents

accessed much of its employment from Brisbane - in 2006 over 50 percent of Samford's residents noted that their place of employment was in Brisbane.

Figure 26: Self Containment, 2006



Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

4 Moreton Bay Regional Council's Rural Centres

4.1 Successful Centres and their Attributes

Successful centres are more than just areas where people buy products and services, and this is especially so for rural centres. When centres are well functioning, communities identify strongly with them and value the centres for a number of reasons. A well functioning rural centre will not just be a dispenser of retail goods and services, they will also be the cultural and community heart of a community and provide key focal point/s for community meetings and events. Well functioning centres will include community and government services, in some cases host education and/or childcare facilities. Recreation, leisure and entertainment opportunities will be prevalent and the areas will aesthetically pleasing, often absorbing or displaying components of the broader area's history.

By providing identifiable locations for social, cultural and economic interaction and exchange, well planned centres will display a strong identity, strong sense of place and will often be the focus for community life and association. And, if coupled with good amenity, an interesting mix of retail tenancies and attractive community infrastructure, centres can be magnets for tourism.

In short, centres will perform optimally if they perform a multitude of functions.

Rural centres can also become places where forms of housing not traditionally associated with rural communities can be located (such as medium density housing, duplex housing, shop top housing). Appropriate locations of a diversity of housing in the rural centre can increase patronage opportunities, provide options for those needing to be closer to services due to their place in their lifecycle (either young adults without a car, or older persons wanting to maintain a connection with the region) and provide more vibrancy in the centre.

Notwithstanding that a successful centre will need to perform a variety of functions, the retail offer will always be a very important component of any activity centre, and this is particularly so in a rural centre. Often rural communities have to travel further distances to obtain their goods and services, so ensuring the right mix of retail tenancies is available is very important. Ensuring that all essential items of goods and services are present assists in the rural centre maintaining a healthy market share.

There is a number of pertinent retail and commercial trends that are affecting the form and functions of activity centres around Australia, which can, in turn, effect the way people use their centres. Trends include:

- The ***growth in convenience retailing***, and the broadening of the goods provided in supermarkets. Larger supermarkets such as Coles and Woolworths can act almost as 'mini-centres' or one stop shops where a patron can purchase all their food and much of their product needs (ie. the inclusion of butchers, bakeries, greengrocers, delicatessens, household goods and appliances). In rural centres

this can have an impact on the local retail offer as some of the expenditure that might have been directed to the local butcher or local greengrocer may now be directed to the supermarket. Ensuring loyalty to the local retailers requires local or rural centres to have a 'personality' as well as high quality produce.

- The continued growth and expansion of **planned shopping centres**. Centre retailing occurs primarily in two types of centres. Firstly, the traditional strip shopping centre (see next dot point), and secondly, the planned shopping centre. The planned shopping centre is the more 'modern' and larger shopping centre that generally has 'anchor' tenants at the extremities of the centre (such as supermarkets and/or department stores and/or discount department stores) with speciality retailers filling in the remainder of the centre. Speciality retailers usually host a wide range of goods and services and can be dominated by national or international retail franchisers. Often low rental rates are offered to the anchor tenants with higher rental rates required from the speciality stores. The rationale is that the anchor tenants draw in the patronage from which all the stores benefit.

Generally no clocks are provided in the centres and layouts are determined based on maximising patrons exposure to as many tenancies as possible. Air-conditioning, bright lights and offerings all undercover add to the 'convenience attraction' of these large shopping centres for many patrons.

If the demand for retail floorspace is not appropriately determined in an area, and if local / traditional centres do not have an ability to attract and retain patrons, planned shopping centres can significantly impact on the local or more traditional shopping strips.

- The **resurgence of the traditional strip centre**. Notwithstanding the above discussion on planned shopping centres, traditional strip centres have seen a resurgence in popularity in recent years. With the ability to offer lower rents, open air environment, genuine public open space and in the case of rural or local centres often less tenancies than a planned centre, the traditional shopping strip is often considered to be a more intimate / smaller scale shopping environment when compared to its planned counterparts. This in turn can provide for greater 'personality' and have a greater appeal with those shoppers who like to 'know' their shopkeepers. In addition, given the lower rents, traditional strip shopping centres can attract a wide range of non-national retail outlets and complementary services such as the 'café' and restaurant set. Traditional shopping strips often form their own identity organically, and in the case of rural centres, this often incorporates or is reminiscent of the history of the broader region. As noted above, where rural centres are successful at creating an identity and have an appropriate mix of retail, café and restaurant tenancies, they can become a magnet for tourism.
- The **importance of amenity, safety and a functional layout** of a centre to attract investment and expenditure. The amenity, safety and functionality of any type of place can often play a large part in attracting patrons (and therefore expenditure) as well as further investment. Evidence of the increased ability to attract investment, retain and attract patrons and encourage more people to

live in traditional centres can be seen with Brisbane City Council's Suburban Centre Improvement Program (SCIP). Forty two (42) SCIPs across Brisbane have been completed since the program's inception in 1996, totalling a value of approximately \$33 million from the BCC. Works include upgrading existing features or providing new ones, such as: new community gathering spaces; upgrading access for pedestrians, cyclists and people with disabilities; improving safety in the centre; reinforcing the centre's identity using design, paving, landscaping, street furniture and artworks. Improving the centre not only improves it for those frequenting the centre, it helps to make it a more attractive location for businesses (BCC, 2012).

- **Lower *consumer confidence and retail sales growth declines*.** In its report to the Australian Government in 2011, the Productivity Commission sought to investigate the *Economic Structure and Performance of the Retail Sector*. The report noted that retail sales growth has trended down over the past half decade. The Productivity Commission noted that while short-term or cyclical factors have contributed to this slowdown, the growth of retail sales has "experienced a long-term slowdown [also] due to changes in consumer buying habits. Consumers are choosing⁵ to spend a smaller share of their income on retail goods because over the recent past, they are saving more and they are spending greater shares of their expenditure on services such as finance, rent and education". Reports suggest that consumers are increasing their proportional spend on essential groceries and decreasing spending in other non-essential areas (Productivity Commission, 2011; AEC 2012).
- ***Increases in service sector activity*.** Notwithstanding the above dotpoint, spending and activities in financial and business services, and community and personal services (including education, recreation, leisure and entertainment and tourism) have been on the rise in the last two decades. Centres that capitalise on these services while providing good amenity and a point of difference will optimise their success, productivity and sustainability into the longer term.
- **The *potential for business zones to host retail uses*.** The Productivity Commission's recent report on the Retail Sector (2011) produced a series of recommendations that if adopted may have an impact on an area's centres hierarchy. In the report, it was suggested that business zones should be more flexible and be able to host a range of retail tenancies (Productivity Commission). The Commission noted that the "location of all retail formats in existing business zones [should be allowed] to ensure that competition is not needlessly restricted". In CChange's view having flexibility within business zones may be appropriate in defined centres. However, if business zones are located outside of designated centres and the overall demand for retail tenancies in an area is not considered, having more flexibility is likely to impact negatively on centres. The ability of retail tenancies to locate in areas where rents may be lower and public space may be limited has the ability to impact significantly on

⁵ CChange would question the usage of the word 'choosing' in this context. With the increasing erosion of affordability in Australia's housing market, it is likely that consumers are *needing* to alter their spending habits.

the traditional centres. As has been discussed here, centres are much more than a dispenser of goods and services, they can often be the cultural and community heart of areas. Without the appropriate retail 'drawcards' in a centre the vibrancy of an area can be considerably reduced.

- The onset of ***On-line Shopping***. Although no official ABS statistics on on-line shopping is collected in Australia, the Productivity Commission (2011) estimate that domestic online retail sales in Australia is about 4 percent, and around 2 per cent of total retail sales are being spent on overseas websites. This equates to around \$12.6 billion per annum (Productivity Commission, 2011). The proportion of retail sales in Australia via on-line shopping is lower than the UK (11 percent) and the US (8 percent).

On-line sales in Australia are forecast to increase to between 10 and 15 percent per annum in the next three years (Productivity Commission, 2011).

The three main reasons cited for using on-line shopping include lower prices, convenience and a wider range of goods to choose from when compared to proximate centres (Productivity Commission, 2011). The goods most popular include books, music and movies, clothing, sporting goods, electrical and electronic goods cosmetics, and toys, and those aged 18 – 44 years are the most likely shoppers (ABS 2009). Groceries are currently much lower on the list of popular on-line shopping, but much lower for groceries. Nonetheless, Coles and Woolworths have started to offer online shopping to customers, including in the Moreton Bay Region, and anecdotal information suggests that for some areas (such as Dayboro), internet shopping is heavily utilised.

No research could be found on the current or projected impact of on-line sales on the requirements of floorspace in centres for retail tenancies. However, monitoring of the impacts are required, as the shift of expenditure away from land-based sales to on-line sales will require a shift methods to determine floorspace needs in activity centres.

- The ***emergence of the lifestyle region and the importance of placemaking***. Lifestyle and liveability are key elements associated with many investment location decisions, particularly for those who are considered to be 'footlose' (ie. can work or operate anywhere) and have higher than average disposable incomes. The recently termed 'knowledge workers' often fall into this category. Although there is no formal accepted definition of knowledge workers, they can be described as being valued for their ability to analyse, design or develop knowledge within a specific subject area. What differentiates knowledge work from other forms of work is their primary task of "non-routine" problem solving that requires a combination of convergent, divergent, and creative thinking (Reinhardt et al., 2011).

Knowledge workers place a premium on an area's lifestyle attributes, including its recreation, leisure and entertainment, community and cultural infrastructure. However, if provided with the opportunity, all things being equal, most people would chose an area with high amenity over one without. The ability to combine land use planning that encourages a well planned and appropriately

sequenced scale and timing of commercial development with high levels of amenity and attractions in an area is important element in attracting people to live and work in an area.

Related to the lifestyle region is also the concept of 'place making'. Place making can be described as a multi-faceted approach to the planning, design and management of public spaces and aims to create good public spaces that promote people's health, happiness, and well being. A key concept behind placemaking is the idea that areas should be planned to cater for people, not cars. Originally termed by the likes of Jane Jacobs and William H. Whyte in the 1960s, placemaking was considered a paradigm shift in urban design that prioritised the development of lively neighborhoods and inviting public spaces, rather than focussing on the provision of cars and shopping centres. Many traditional strip centres are focussing on place making to encourage further patronage and investment.

- The **growth of home-based business activity**. There has been a recent growth and continuing trend for home-based businesses in Australia (ABS 2005). Corporate downsizing, the greater premium placed on skills and knowledge, the ability of businesses to readily source inputs from remote suppliers and enhanced communications and information technology have provided opportunities for new and more flexible modes of working, and have given rise to the 'home-based business'. Micro and small businesses, especially new start-ups, are establishing in home offices and in low rent offices and shopfronts in the suburbs and in regional centres. People that establish companies in fields like design, marketing, software development, health and consultancy advice drive this activity.

As home-based business activity grows, there will be implications for commercial land requirements that will require creative responses from Councils. For example, as home-based businesses grow, and as new staff members are added, many firms will seek to move from the home office to a conventional office in their local area. Their move into the commercial office market may be a cautious step to relatively cheap accommodation until the business can sustain higher rents. Their target is therefore low-grade office space and residual shopfronts.

In areas such as Woodford, Samford and Dayboro, homebased businesses may account for more than simply knowledge based industries. In these areas, combined with the knowledge based industries may be a range of services operating from home. Although no survey of homebased businesses was conducted for this project, if Council does progress further investigations regarding employment and economic development opportunities for the Rural Areas, it is recommended that detailed investigation into homebased businesses, and what they require to maximise success is conducted.

4.1.1 In Summary

Taking into account the above discussion on successful elements and trends in the retail experience, well functioning rural centres will have:

- An appropriate mix of retail goods and services, with a high value on customer service/experience;
- Service sector tenancies that can cater for the local market;
- Be considered the cultural and community heart of the community;
- Key focal point/s for community meetings and events;
- Appropriate community and government services
- Attractive, safe and inviting recreation, leisure and entertainment opportunities;
- Legible and safe street and tenancy layouts that have a focus on placemaking; and,
- A tourism element.

Successful rural centres may also incorporate the broader area's history and have a mix of housing that can cater for a variety of households. The areas surrounding the centres will be well established to have appropriate homebased businesses.

Moreton Bay's Rural Centres have been assessed based on this list of success criteria.

4.2 Moreton Bay's Rural Centres' - Current Roles

The Moreton Bay Region has three main centres serving its rural areas. These include:

- Woodford;
- Dayboro;
- Samford.

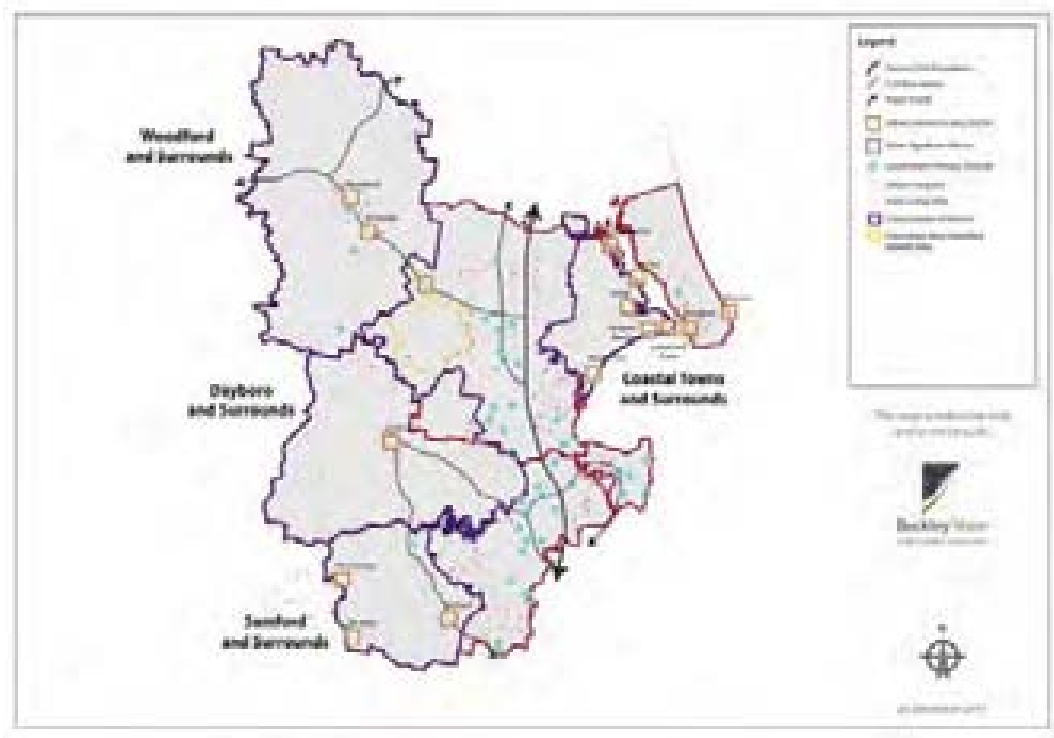
In the western rural area there are several minor centres, including:

- D'aguilar;
- Wamuran;
- Mt Mee;
- Mt Glorious; and,
- Mt Nebo.

In the coastal area there are also minor centres, such as:

- Donnybrook;
- Toorbul;
- Ningi;
- Sandstone Point; and,
- Beechmere.

Figure 27 shows the location of most of these centres.

Figure 27: Moreton Bay Rural Areas Main and Minor Centres

In December 2011, CChange completed land use analyses, broad floorspace assessments⁶ and consultation with retail tenancies in each of these centres to determine the centres' current role, and inform decisions regarding appropriate future roles. The output associated with the main centres is provided below in detail. The criteria for successful centres, outlined in the preceding section, has been used to provide a description and assessment of the main centres.

Overall statements associated with the minor centres are also provided. Appendix 1 provides more detailed information on the minor centres.

4.2.1 Woodford

Woodford is an attractive centre that has an established 'rural' service centre identity. While some tenancies interviewed were relatively new in the centre (having been in Woodford for less than 2 years), the majority of tenancies had been in Woodford for

⁶ Only broad floorspace analyses were completed as this was not part of the original scope of CChange's work and therefore the quantum of floorspace suggested are provided as a guide only. In addition, at commissioning it was expected that land use and GLFA information would be provided to CChange. However, after inception it was made clear that detailed land use and GLFA information was not available. As such CChange completed land use analyses at each of the centres, but GLFA analyses were not conducted. The resulting information presented by CChange in this section therefore discusses the number of tenancies and/or site area rather than GLFA or GFA.

some time (4 years and over), with some having been present in the Centre for more than 25 years. All people interviewed indicated that they were committed to Woodford and planned to stay there for the longer term.

Based on anecdotal information obtained through consultation with tenancies in the Woodford centre and observations while visiting the centre, a clear sense of identity is present in the Centre. Shopkeepers who were interviewed utilised phrases like “one big happy family” or “all businesses are happy to help each other out” when asked what it was like to operate in the Centre. Everyone interviewed indicated that a clear sense of community was present generally in the area, evidenced by people utilising a variety of places as key meeting venues for community and personal functions. All people interviewed agreed that Woodford’s key value and strength was its country feel and charm.

Figure 28: Woodford Hotel



Questions regarding Woodford’s catchment were asked in the consultation period⁷. Based on the answers provided, it is likely that Woodford’s catchment extends at least to the northern parts of the rural areas in Moreton Bay, and for some goods and services to areas such as Caboolture, Bribie Island, Kilcoy and the Sunshine Coast. Given its location on the highway, people interviewed noted that a proportion of their business comes from people travelling through to specific destinations (such as Woodford Folk Festival, camping areas, other destinations in the region), but many indicated that the Woodford centre was not considered to be a tourist destination in itself. All agreed that tourism could add value to the Centre but for tourism to be successful, the entertainment aspect of Woodford would need to be improved. Most tenancies interviewed indicated that they felt that residents shop almost exclusively

⁷ Given resource constraints of the project, no statistically valid in-centre or in-home surveys could be completed.

local for their food and other essential items. If items were not available in Woodford, Caboolture and Morayfield were considered to be local resident's next choices.

The Woodford Centre has over 68 tenancies in its centre, covering some 24,000sqm in site area. Of the tenancies in Woodford, 46 percent were in retailing, and the remainder in services, government or other facilities. Five tenancies were retailing food and beverages and 6 were restaurants, pubs, cafes or takeaway premises. At the time of the survey, the only vacant premises were in the Woolworths complex. Figure 29 shows the layout of the tenancy types in Woodford.

Figure 29: Woodford Retail Tenancies

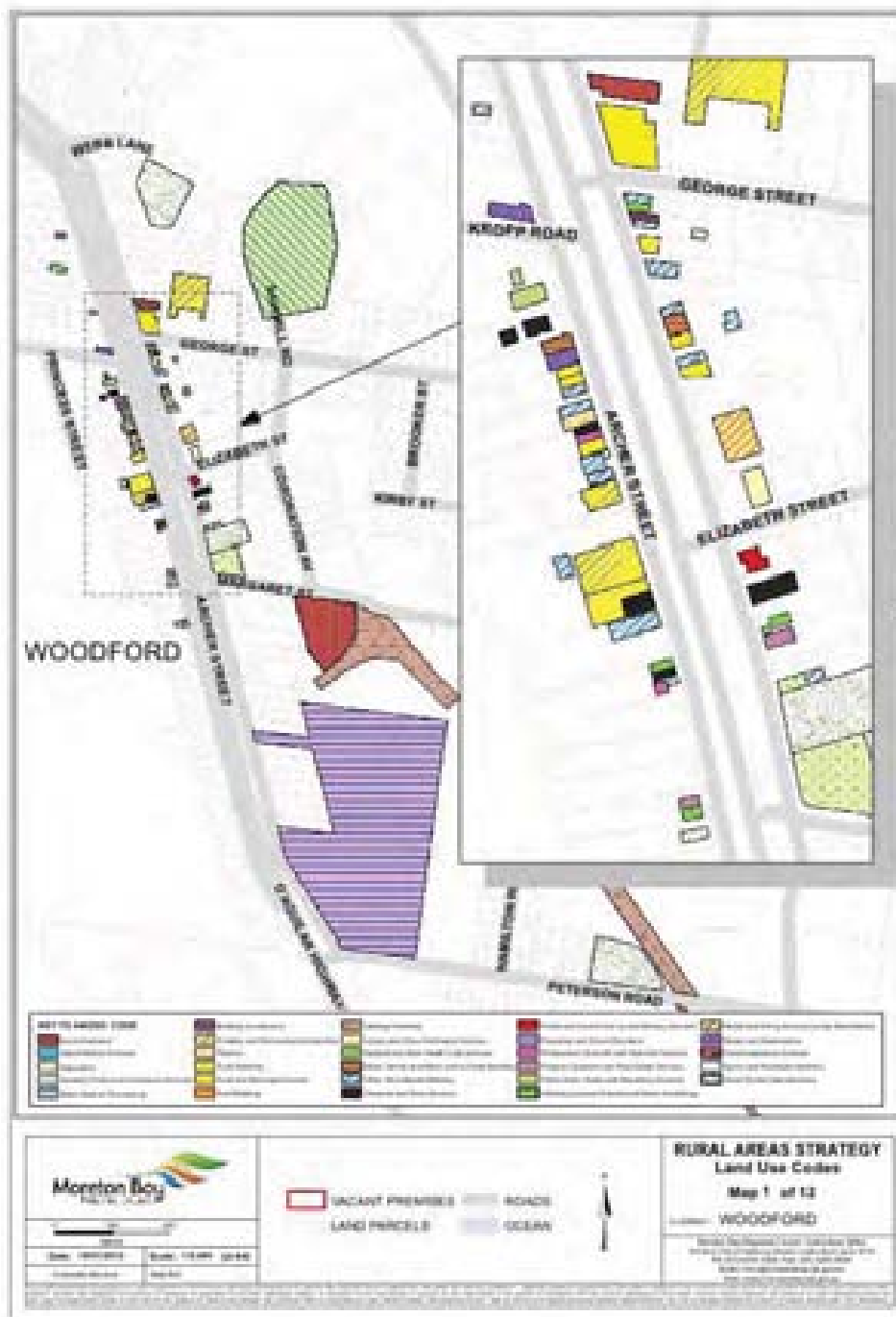


Figure 30: Streetscape, Woodford



With regard to changes in the Centre over the last few years, people interviewed indicated that there had been a discernable increase in the number of people in town, which they considered to be due mostly to residential increases in the area (and not an increase in tourism). However, some indicated that although more people were around fewer were spending money, particularly on non-essential goods and services. This correlates with the earlier general findings of research regarding the retail sector.

Interviewees indicated that the following key goods or services would improve the centre:

- A shoe shop, and in particular children's shoes and clothing;
- Another bakery;
- A service station;
- ATM and/or another bank;
- Medical centre with specialists;
- Restaurants and other attractions to complement the Woodford Hotel to provide some night entertainment and provide tourism opportunities; and,
- More public transport to and from the Centre.

To the above list based on CChange's observations a better space for the information centre would also improve the centre. Anecdotally, while not the most presentable, the information centre attracts many visitors.

Figure 31: Woodford's Visitor Information Centre



The issue of Woolworths not being 'personal' enough for the country feel and not adding to the amenity of the town the was raised as a weakness of the centre. A softening of the Woolworths façade/street frontage would be a positive contribution to the overall amenity of the Centre. In addition, safety associated with traffic and carparking was also raised as needing attention. Many interviewees indicated that the parking directly on the D'Aguilar Highway was particularly problematic.

The number of car parks was not considered adequate by many people interviewed, and car parks specifically for motorbikes were raised as being required. However, observations when at the centre suggested that there were considerable car parks were vacant even at peak times.

It was also observed by CChange that the Centre is divided by the Highway. Not only does this make a less than safe environment for cars to exit carparks, crossing the street for pedestrians was particularly problematic. Given that there are some social and community uses on the western side of the Centre, assistance for crossing the street should be provided. This could be in the form of refuges, pedestrian crossings or potentially signalled crossings.

Figure 32: Carparking Fronting the D'Aguilar Highway, Woodford



Figure 33: Streetscape, Woodford



Figure 34: Woolworths, Woodford



Interviewees were also asked questions about the adequacy of the size of the centre. Most indicated that if population increases substantially in the future then it could be expanded. However, some emphasised that if it was expanded new and diverse shops should be considered, rather than more of the shops that currently exist. Entertainment was raised as an area that needed expanding in the centre.

Broad floorspace analyses completed by CChange indicated that given the tenancies in the Centre and the likelihood of people within the Woodford and Surrounds community of interest spending a high proportion of their expenditure on non-essential items at a variety of centres, it is likely that the Woodford Centre could support approximately 4,300sqm of floorspace in 2011. Taking into account population changes to 2031, the broad level of floorspace that is likely to be supported by the Woodford and Surrounds community of interest would in be in the order of 5,000sqm. AEC's recent report to Council (2012) supports this analysis, with an indication that Woodford could support up to 4,406sqm by 2031. AEC note that current gross leasable floorspace area (GLFA) at the centre was 7,694sqm, and land use surveys completed by CChange supports this finding⁸. Therefore it can be concluded that the floorspace associated with the Woodford Centre is being utilised by more than just the Woodford community of interest, and that it is likely to be adequate now and into the future.

Given the above discussion, Woodford can be described as a very well functioning Centre that is currently servicing a wide area. The centre could capitalise further on its tourism component and improvements for the safety for pedestrians and car users could be made. Comments regarding how Woodford fairs with relation to the criteria for successful rural centres outlined in Section 4.1 are provided below:

Table 3: Summary of Woodford compared to Success Criteria for Rural Centres

Criteria	Meets Criteria?	Woodford
An appropriate mix of retail goods and services, with a high value on customer service/experience	✓✓✓	Retail goods and services are well provided in the centre. Customer service is highly valued
Service sector tenancies that can cater for the local market	✓✗	Some are provided, but potentially room for expansion here
Be considered the cultural and community heart of the community	✓✓✓	People are very proud of Woodford and it is considered a community hub.

⁸ Council calculated the site area for retail goods tenancies to be 24,300sqm, based on CChange's land use surveys. If 30 percent of the site was taken up by leasable floor area, then GLFA would be 7,290sqm, which is similar to the 7,694sqm indicated by AEC.

Criteria	Meets Criteria?	Woodford
Key focal point/s for community meetings and events	✓	Some exist, but many use the cafes. Room for expansion / further exploration regarding whether particular areas are required
Appropriate community and government services	✓✓	Good level of community and government services
Attractive, safe and inviting recreation, leisure and entertainment opportunities	✓✓✗	Attractive centre, although Woolworths façade could be more appropriately matched to the centre's amenity Safety is an issue – pedestrian and parking Recreation, leisure and entertainment needs improvement
Legible and safe street and tenancy layouts that have a focus on placemaking	✓✗	Legible layout, but safety an issue as stated above. Placemaking a focus, but could be further improved, particularly with a dedicated focal point
A tourism element	✓✗	Considered a 'stop off' when passing through to festivals or other events, rather than a tourist attraction in itself. Could improve here.
History incorporated	✓✓	A sense of history is present
Caters for a variety of households	✗	Some residential, but not a diverse mix.

4.2.2 Dayboro

Dayboro is a very well presented centre with a clear sense of identity and community. The streetscapes reflect an 'old country town', and this has been maintained successfully even on new buildings (such as the IGA). Tenancies interviewed agreed that there is a great sense of place in Dayboro and that the community embraces the Centre. There are considerable community events held in Dayboro (such as Dayboro Day, Christmas Festival, Antiques Day to name a few). Film nights are hosted at the Community Hall once a month and anecdotal information suggests that the park and park stage are well utilised and patronised by the community. People interviewed indicated that there was 'good community spirit' in Dayboro, and that it is a very friendly town.

Figure 35: Community Space, Dayboro



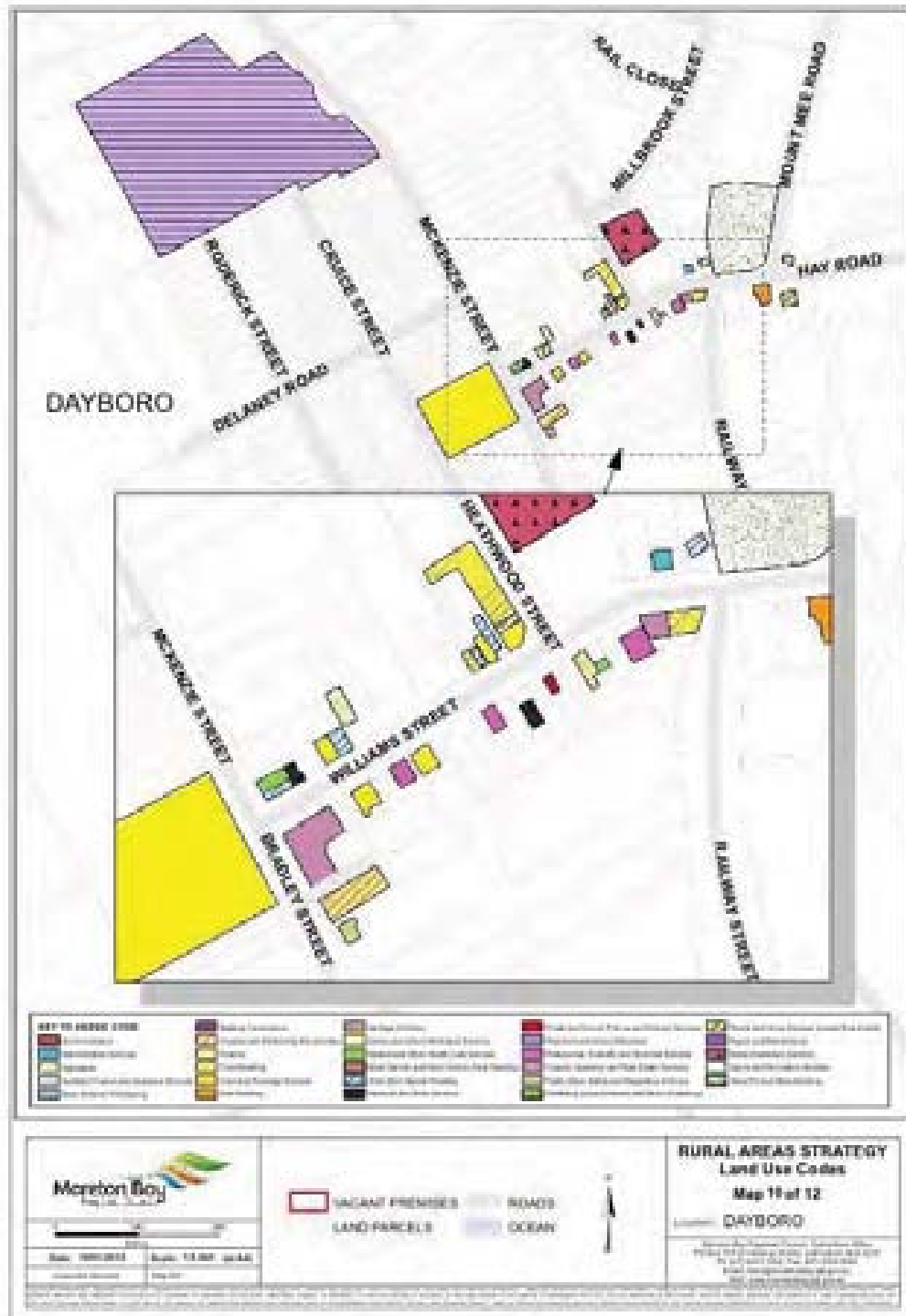
Figure 36: Streetscape, showing IGA incorporating Dayboro amenity



Dayboro has 36 tenancies in its Centre, of which 47 percent could be classified as retail. The retail tenancies utilise 10,800 sqm of site area. Of the retail tenancies, 35 percent are were cafes, takeaways, pubs and restaurants, and 18 percent were supermarket or

specialised food outlets. The spread of tenancies across the Dayboro centre is shown below.

Figure 37: Dayboro Land Use



Based on anecdotal information from tenancies interviewed, the likely catchment area of Dayboro includes the Dayboro and Surrounds community of interest but also extends to other areas of Moreton Bay Region, Brisbane and Sunshine Coast. Often interviewees indicated that tourists come to Dayboro, either on their way to places such as Mt Mee,

or to visit Dayboro and its surrounds on a day trip. Specific places of interest in the centre of Dayboro included the Bakery, Butchers, the Pub and the Tourist Information Centre.

For other weekly shopping and higher order goods not available in Dayboro, interviewees indicated that shoppers were likely to use Strathpine, Morayfield, Petrie and Northlakes. A few people mentioned that residents in Dayboro were likely to utilise on-line shopping and get their goods delivered as well.

There was a mix of responses regarding how long people had been established in the Centre, ranging from 3 weeks to more than 18 years. The majority of people indicated that they intended to stay in Dayboro for the longer term, should they be able to afford to (many expressed concerns about the 'excessive' leasing costs in the centre).

Interviewees indicated that the strengths of the town included its rural feel, its walkability, the support provided to tenancies by other tenancies and the community spirit. When asked to name any weaknesses, people indicated that parking was a considerable issues, particularly near the post office but also generally across the Centre. More disabled parking was also indicated as being required. In addition to parking, other issues included the need for further promotion, and the need for more tourist attractions in town. Signage to encourage people to stop if they are travelling through town was also mentioned, as was better legibility in the street layout (confusion at intersection on Williams Street) and the need for public transport to the centre.

Figure 38: Attractions in Dayboro



When asked their opinion on opportunities or services/tenancies required in the centre, interviewees indicated that further diversity in shops was needed, particularly more gift

shops or shops with a unique 'Dayboro' country feel, produce store, covered outdoor dining areas in parks as well as more restaurants and cafes. Tourist elements such as a chocolate shop or other food of the region shop were also suggested. Some people mentioned that a weekly market would also add value to the Centre and may negate the need for more specific shops.

When discussing tourism specifically, most people interviewed agreed that it could be strengthened. Although events are well attended and are relatively frequent, further advertising and marketing was suggested to provide better outcomes for the town. As noted above, with regard to specific tourism elements in town, the butcher and bakery were considered popular, but most people agreed that many tourists use Dayboro as a thoroughfare rather than as a destination in itself.

Figure 39: Dayboro Art Gallery



Consultation with tenancies indicated that there was a range of opinions regarding the Centre's size. Almost half indicated that it was appropriately sized, and the remaining half indicated that some minor expansion should be explored. All emphasised that regardless of its size, the country feel needs to be maintained. Using reasonable assumptions regarding the Dayboro's community of interest level of spend in the centre, floorspace analyses completed by CChange indicated the Dayboro centre could support around 3,600sqm in 2011 up to around 4,000sqm in 2031. AEC's recent report to Council (2012) supports this analysis, with an indication that Dayboro could support up to 4,367sqm by 2031. AEC note that current gross leasable floorspace area (GLFA) at

the centre was 3,109sqm, and this was supported by CChange's surveys⁹. Based on the broad analysis completed by CChange, the current floorspace of the Centre at Dayboro is in deficit to a minor degree. In CChange's view, however, additions to allow for more floorspace would be best directed towards tourism and non-food activities, and suggestions such as a market could be explored. It is emphasised that the additions required are likely to be small.

Given the above discussion, Dayboro can be described as a welcoming Centre with a good rural sense of identity. However, there are opportunities to expand and market its tourism component and improve the road layout. Comments regarding how Dayboro rates with regard to the criteria for successful rural centres outlined in earlier sections are provided below:

Table 4: Summary of Dayboro compared to Success Criteria for Rural Centres

Criteria	Meets Criteria?	Dayboro
An appropriate mix of retail goods and services, with a high value on customer service/experience	✓✓	A range of retail goods and services are provided in the centre, but a more diverse mix some could be introduced. Customer service is highly valued.
Service sector tenancies that can cater for the local market	✓✗	Some are provided, but potentially room for expansion.
Be considered the cultural and community heart of the community	✓✓✓	People are very proud of Dayboro and it is utilised for community events frequently.
Key focal point/s for community meetings and events	✓✓✓	Good use of Centre and key spaces for meetings and events.
Appropriate community and government services	✓✗	Some provided, further investigation would be required to determine whether adequate for population.
Attractive, safe and inviting recreation, leisure and entertainment opportunities	✓✓	Attractive centre Recreation and regular leisure opportunities (eg film night)
Legible and safe street and tenancy layouts that have a focus on placemaking	✓✗	Road legibility an issue Placemaking a focus

⁹ Land use surveys completed by CChange indicate that this is likely to be accurate as site area for retail goods tenancies totalled 10811sqm, and if 30 percent of the site was taken up by leasable floorarea, then GLFA would be 3,243sqm.

Criteria	Meets Criteria?	Dayboro
A tourism element	✓✘	Could improve elements – has some attractions, but needs further ones. A market could be explored. Needs marketing.
History incorporated	✓✓	A sense of history is present
Caters for a variety of households	✘	Some residential, but not a diverse mix.

4.2.3 Samford

Based on consultation and observations it is clear that Samford Village has a genuine 'Village' feel. The gateways to the Village are well established and the Village has a welcoming environment. All people interviewed displayed a strong sense of pride and loyalty to the Village and indicated that there was 'definitely' a good sense of identity in the Centre and a strong sense of community generally in the Samford area. Interviewees often used phrases such as "everyone knows everyone by name here" and that "all businesses support each other" when asked to nominate the strengths of the Centre. Community events were held regularly, with many noting that "there was always something on in the park, at the Farmer's Hall or the CWC". The people interviewed were very proud of the Village atmosphere and indicated that they had every intention of staying in the Centre for the longer term.

Figure 40: Community Uses in Samford





When interviewees were asked about the catchment of their customers, the responses were varied. All tenancies agreed that Samford and its surrounds were their key catchments, but tenancies such as the butchers, bank, florist, and gift stores indicated that people could come from other parts of the rural areas in Moreton Bay Region as well as from all over Brisbane.

Although it was noted that most locals would prefer to shop locally, interviewees nominated Keperra, Brookside, Chermside as other centres residents may utilise if they could not source the product or service from the Village.

Strengths of the Village were seen to be 'keeping the large chains out, particularly the large supermarkets' and having a strong support base from the community. Few weaknesses were noted, although the need for consistent business hours was mentioned. High rents by some tenancies were indicated as being a disincentive for shops such as gift and fashion stores. Observations of the Village indicate that a pedestrian crossing would assist safety in the Village.

Figure 41: Samford Village Streetscape



Figure 42: Samford Village Pub



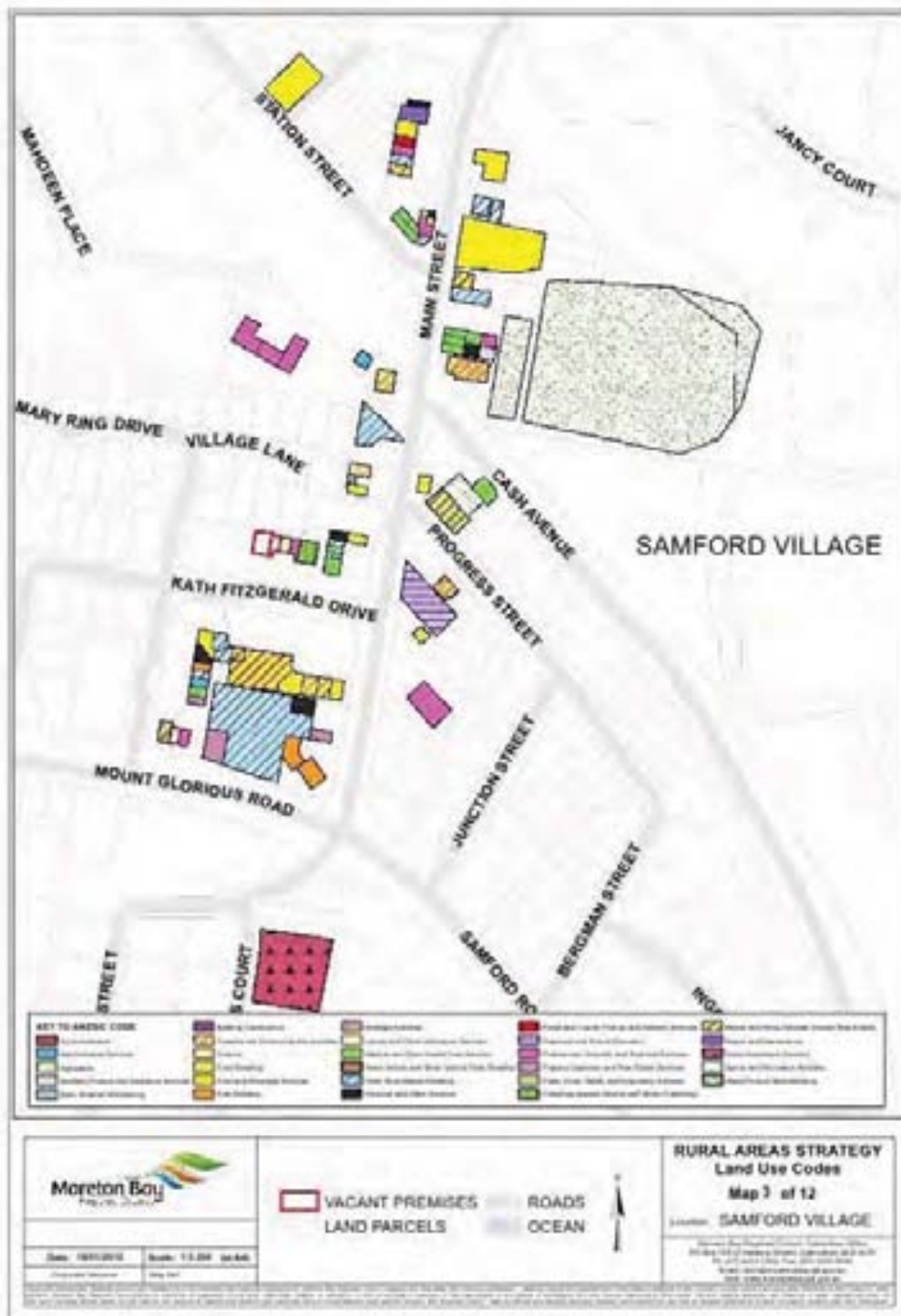
In 2011 Samford had 84 tenancies in its Centre, of which 46 percent were retail premises. The retail premises utilised some 27,000 sqm of site area. Of the retail tenancies, over 30 percent were cafes, takeaways, restaurants and pubs, and over 15 percent were supermarkets and/or specialised food outlets. Two vacancies were present at the time of the land use survey.

People interviewed held the opinion that the following tenancies may improve the Village:

- Hardware shop
- Craft shop
- Clothing stores for men and children
- Bookshops

- Police station
- More gift shops
- Another grocery shop
- Artists studio
- Another bank

Figure 43: Land Use, Samford Village 2011



Although most people agreed that the Village was generally quite busy, and that many daytrippers came for a meal and/or stopped by on the way through to other areas, everyone interviewed indicated that tourism could be improved. Marketing and advertising were seen to be the key to increasing tourism, as interviewees considered that there were already adequate tenancies and attractions in the Village. Nonetheless, most agreed that improvements would be welcomed, and noted that other tourism shops or attractions that had a distinctive 'Samford Village' specific or 'Rural' specific feel would be welcomed. Suggestions made included farmers markets, selling local produce and plants as well as artists markets and/or local art work along the street and paths.

Figure 44: Samford Village Farmers Hall



All people interviewed were of the opinion that Samford Village is an appropriate size. Broad floorspace analyses completed by CChange indicated Samford could have supported approximately 8,100sqm in 2011 (refer Appendix 2 for detailed analysis). Taking into account population changes to 2031, the broad level of floorspace that is likely to be able to be supported by the Village would in be in the order of 8,500sqm. AEC's recent report to Council (2012) indicated that a higher level of floorspace could be supported in Samford (around 10,190sqm in 2031). At 2011, AEC noted that gross leasable floorspace area (GLFA) at the centre was 11,265sqm and this was supported by CChange's research¹⁰. Given the broad expenditure analysis conducted, floorspace at the Village is considered to be well appropriate now and at 2031 for local shoppers and for additional visitors to the Centre.

¹⁰ . Land use surveys completed by CChange indicate that this is likely to be accurate as site area for retail goods tenancies totalled 27,075sqm, and if 40 percent of the site was taken up by leasable floorarea, then GLFA would be 10,830sqm. It is noted that a higher proportion was allocated to GLFA in Samford when compared with Dayboro and Woodford as observations suggested site coverage was higher.

Figure 45: Samford Village, community space



Figure 46: Samford Village, streetscape showing parking



Based on observations and consultation with tenancies in the Samford Village, it can be concluded that the Village is a popular and well respected centre. It is appropriately

sized and has many strengths. Tourism could be expanded in the centre, however, it is noted that of Moreton Bay Region's rural centres, Samford is likely to be the most visited centre by people outside its immediate catchment area. Using the criteria for successful rural centres, the following comments can be made:

Table 5: Summary of Samford compared to Success Criteria for Rural Centres

Criteria	Meets Criteria?	SAMFORD
An appropriate mix of retail goods and services, with a high value on customer service/experience	✓✓✓	Retail goods and services are well provided in the centre. Customer service is highly valued.
Service sector tenancies that can cater for the local market	✓✓	Well provided for in the Centre.
Be considered the cultural and community heart of the community	✓✓✓	People are very proud of the Village feel and it is considered a community hub for the area.
Key focal point/s for community meetings and events	✓✓✓	Great key focal points exist – the Farmer's Hall, the Parks and CWA.
Appropriate community and government services	✓✓	Good level of community and some government services. The adequacy of government services would require further indepth investigation.
Attractive, safe and inviting recreation, leisure and entertainment opportunities	✓✓✓	Attractive centre. Great opportunities for recreation, leisure. Entertainment opportunities exist.
Legible and safe street and tenancy layouts that have a focus on placemaking	✓✓	Legible layout. Pedestrian crossing could be provided. Placemaking a focus.
A tourism element	✓✓	Anecdotal information suggests good day tripper patronage. More marketing could assist. Local markets could be worthwhile.
History incorporated	✓✓	A sense of history is present.
Caters for a variety of households	✗	Some residential, but not a diverse mix.

4.2.4 Minor Centres

Moreton Bay Regional Council's minor centres in the rural areas were visited during the commission. The detailed output is provided in Appendix 1. The minor centres were serving a convenience role and, in some cases, local services were present. It is the opinion of CChange that no expansion to these areas is required in the future. However, many of the minor centres have issues associated with amenity as well as safety, particularly with regard to street crossings if located near busy transport routes.

4.3 Current and Future Role of Centres

As has been shown in Section 4.2, all main rural centres in the Moreton Bay Region are functioning well. They are currently fulfilling roles that are conducive to their main catchment areas and can be described as successful rural towns/centres.

Broad floorspace analyses conducted indicated that there is ample floorspace at Samford and Woodford now and into the future. Even by 2031 it is unlikely that more floorspace will be required at these Centres. As such, it is recommended that these centres' roles and floorspace remain as they were in 2012. Dayboro could support an increase in floorspace. Based on analyses conducted here it is likely that this would be most successful if further tourism or specialised tenancies were explored, rather than an increase in supermarket tenancies.

All the main centres investigated here would benefit from a direct marketing/tourism strategy, local area investigations into safety / legibility, and potential requirements for space / areas for community groups. Opportunities to enhance the centres are summarised below:

Table 6: Summary of Opportunities to Enhance the Woodford, Dayboro and Samford

Improvements that would benefit the Centres		
Woodford	Dayboro	Samford
• The development of well defined meeting areas / public spaces could be provided. Currently many community groups use the cafes for meetings. Further exploration regarding requirements would be useful • Pedestrian and parking safety is an issue. • Recreation, leisure and entertainment needs improvement • Some services are provided, but potentially room for expansion here • Placemaking a focus, but could be further improved • Amenity improvements to soften the façade of the Woolworths would be beneficial • With regards to Tourism, the centre is considered a 'stop off' • when passing through to festivals or other events, rather than a tourist attraction in itself. Improvements required in tourism and marketing. • Some residential, but not a diverse mix. Detailed investigations of region's needs has been prepared by Buckley Vann.	• A range of retail goods and services are provided in the centre. Further diversity would benefit the centre. • Some services are provided, but potentially room for expansion. • Some community and government services provided. Further investigation would be required to determine whether adequate for population. • Road legibility an issue. • Could improve tourism elements – has some attractions, but needs further ones. Needs marketing. • Some residential, but not a diverse mix. Detailed investigations of region's needs has been prepared by Buckley Vann.	• Good level of community spaces and services provided, but few government services. Adequacy of government services would require in-depth investigation. • Legible layout but pedestrian crossings could be provided to assist centre functioning. • Anecdotal information suggests good day tripper patronage. However, • more marketing could assist. Investigation of the introduction of local markets would be worthwhile • Some residential, but not a diverse mix. Detailed investigations of region's needs has been prepared by Buckley Vann.

5 Exploring Economic Development Opportunities

5.1 Current Industry Sectors & their Likely Future

As noted in the introduction, exploring future rural enterprise opportunities and how value could be added to existing and future primary production is an important part of the overall Rural Areas Strategy for Moreton Bay. LRAM is a core component of the consultant team and are expert in rural lands and rural industries. Thus, information associated with current and likely future primary production industries can be found in LRAM's report.

CChange focused on exploring other potential opportunities given Council's vision, their stated preferences in their Economic Development Strategy and other potential opportunities specifically related to the rural areas.

5.2 Other Potential Opportunities

Section 4 outlined the areas that Council intends to focus on to assist in achieving their vision of *foster[ing] a vibrant, sustainable and knowledge-driven economy that creates valuable employment for residents, protects the region's high quality of life and provides a prosperous future for all residents.*

Source: Moreton Bay Regional Council EDS

This included a number of areas. However, those considered applicable to the rural areas by Council included:

- Food & Beverage manufacturing;
- Building product manufacturing;
- Transport and logistics;
- Clean energy initiatives;
- Moreton Bay as a 'home' for non-resident workers in the resource industry.
- Tourism.

As noted in the preceding section, home-based businesses are also an area for further investigation. Given that the current structure of home-based businesses could not be determined in this study, it is recommended that Council conduct investigations into this area as a potential economic development opportunity if they progress a rural areas specific strategy.

LRAM are focusing on Food & Beverage Manufacturing, and as such, CChange has assessed the remaining areas noted above.

As discussed in LRAM's report, the prominent rural sector that currently underpins Moreton Bay Region's Rural Areas is in decline and future prospects for this sector seem bleak. As such if employment is to be maintained in the rural areas of Moreton Bay or,

optimistically, if the rural areas are to support increasing self containment in the region, other opportunities need to be determined.

The framework utilised to determine potential opportunities for the rural areas included ensuring that:

- Industry recommendations supported the principal of promoting profitable and sustainable rural industries;
- Recommendations can assist in Moreton Bay diversifying its economic development base in a way that assists Moreton Bay become a thriving region of opportunity and more self contained;
- The skills and attributes of the workforce required to optimise the economic development opportunities in Moreton Bay are either present or are considered developable;
- The infrastructure required to ensure that opportunities can be maximised is planned or provided; and,
- All recommendations made enhance and protect the vibrant lifestyle and unique identity of the Moreton Bay Rural Council.

5.2.1 Building product manufacturing

Council's EDS indicates that building product manufacturing has great potential to be a high value adding activity in the Moreton Bay Region. Key areas specifically targeted in this sector include:

- Metal product manufacturing, such as prefabricated steel, structural steel, architectural aluminium, non-ferrous pipe fitting manufacturing, metal coating & finishing, non-ferrous metal container manufacturing, steel pipes and tubes, iron and steel casting;
- Cement, lime, plaster and concrete manufacturing, such as plaster product manufacturing, concrete slurry, concrete pipe and box culvert manufacturing;
- Glass manufacturing, particularly specialised glass for building industry, medical industry, solar industry; and,
- Pre-fabricated manufacturing, such as buildings, garages, sheds, kit homes, waste disposal blocks.

Council notes in their EDS that this sector is likely to prosper in Moreton Bay due to the fact that there is strong population growth in the Region, and SEQ generally, which has resulted in a high demand for these types of products to support the building industry. In addition, Moreton Bay region has an existing skills base, and there are significant sized parcels of industrial land when compared to Brisbane.

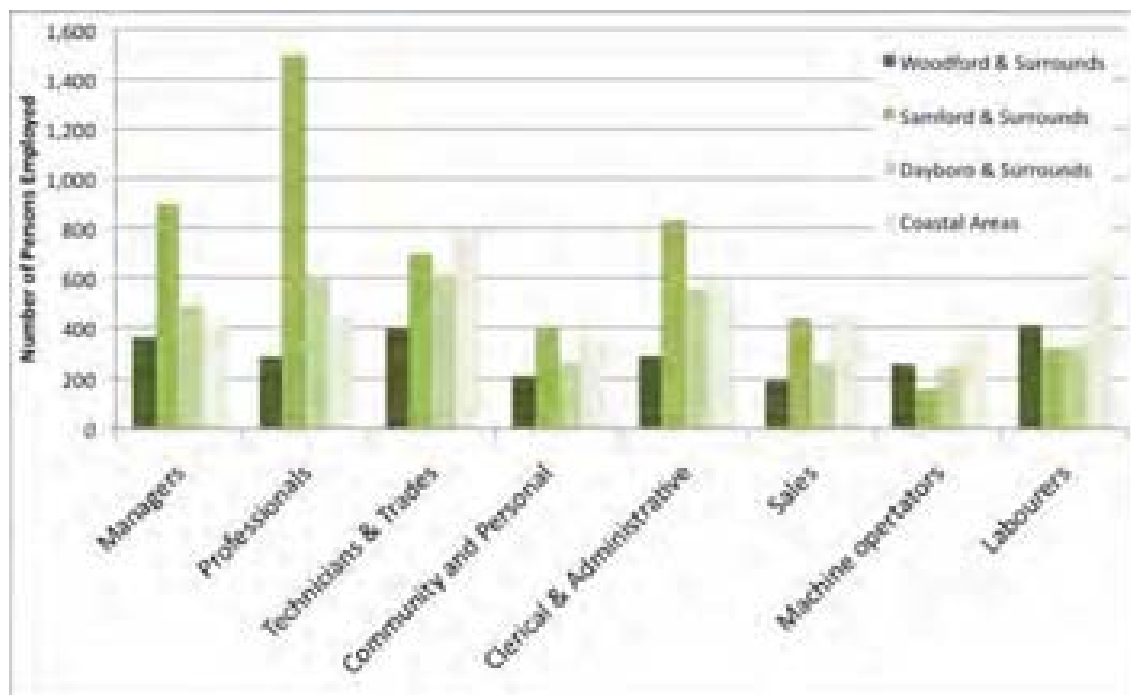
While these facts are indeed true, the extent to which the rural areas could physically host this sector remains questionable. Identification of Moreton Bay region's industrial areas show that most are proximate to the urban areas rather than the rural areas (refer Table 7) and that the rural areas host 12.7 ha in total, with only 2.16 ha being vacant. Given Moreton Bay's focus on preserving agricultural areas within the rural areas it is not likely that more industrial areas will be developed in the future. Furthermore, although in 2006 Moreton Bay had nearly 25,000 people employed as technicians or

trades people, nearly 18,000 in labouring jobs and over 11,000 machine operators only 10, 9 and 8 percent these employed people respectively lived in the rural areas.

Table 7: Moreton Bay Region's Industrial Areas

Precincts	Current Occupied	Current Vacant	Future Supply
C-M PAC	1.13	0.00	0.00
Caboolture Airport	145.02	58.60	0.00
Caboolture	203.61	0.00	0.00
Brendale	259.50	103.28	0.00
Brendale West	23.08	23.28	200.75
Bribie Island	8.17	20.17	0.00
Burpengary	31.11	1.34	45.07
Clontarf	78.54	4.43	0.00
Dayboro	1.05	1.61	0.00
Deception Bay	12.95	2.55	30.53
Elimbah	0.00	3.05	391.61
Hills District	14.16	0.08	0.00
Joyner	18.08	0.00	0.00
Kippa-Ring	7.53	0.13	0.00
Lawnton	34.48	0.38	0.00
Margate	2.63	0.00	0.00
Mt Mee	0.20	0.20	0.00
Narangba	170.59	36.39	84.31
North East Business Park	0.00	0.00	384.26
North-Lakes Mango Hill	28.96	0.00	181.01
Petrie	202.77	57.79	0.00
Redcliffe	1.06	0.00	0.00
Rothwell	2.92	2.48	0.00
Strathpine	4.86	0.02	0.00
Woodford	9.29	0.35	0.00
Total	1,261.69	316.15	1,317.55

Source: AEC (2012) Future Land Demand Study

Figure 47: Occupation by Community of Interest, 2006

Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

Utilising the assessment framework noted above, it is concluded that the rural areas are unlikely to be able to host this sector at the current time. Instead, recommendations regarding strengthening this sector for the rural area should be dedicated to ensuring **access** to key industrial nodes in Moreton Bay region's are maximised and that the rural area's population is encouraged to undertake training in these sectors.

Table 8: Assessment of the Likely Success in the Rural Areas Hosting the Building Product Manufacturing Industries

Would supporting the Building Product Manufacturing Sector in the Rural Areas....?		Comments
Support the principal of promoting profitable and sustainable rural industries?	No land currently identified	Appropriate industrial land not located in the rural areas, and no appropriate land in the rural areas that could host this activity has been identified. Council may wish to investigate the potential for appropriately located industrial land in the rural areas in more detail

Would supporting the Building Product Manufacturing Sector in the Rural Areas....?		Comments
Assist in Moreton Bay diversifying its economic development base in a way that assists Moreton Bay become a thriving region of opportunity and more self contained	Potentially.. but	As noted, no appropriate land. If land was available this sector could assist the rural areas, however further skilled workers are likely to be required in the region.
Be successful given the current skills and attributes of the workforce required to optimise the economic development opportunities? Could the skills and attributes of the workforce suit the industry in the future?	No / potentially	In 2006 the number of people appropriately qualified for these industries was very low in the rural areas. Training initiatives should be encouraged for the rural area's populations so they can access employment opportunities elsewhere in the region.
Be successful given the infrastructure required to ensure that opportunities can be maximised?	No but...	Appropriate industrial land not located in the rural areas, and no appropriate land in the rural areas that could host this activity has been identified. Council may wish to investigate the potential for appropriately located industrial land in the rural areas in more detail However, the provision of good access from rural areas to the urban areas hosting these uses could assist increased employment opportunities for rural areas
Enhance and protect the vibrant lifestyle and unique identity of the Moreton Bay Rural areas?.	No	Appropriate industrial land not located in the rural areas, and no appropriate land in the rural areas that could host this activity has been identified. Council may wish to investigate the potential for appropriately located industrial land in the rural areas in more detail. The identification of land would need to ensure that the identities of the rural areas were not compromised.

5.2.2 Transport and logistics

Council's EDS states that the Moreton Bay region is well positioned to attract and expand upon distribution centres for large, national retail chains, and logistics operations, such as warehousing and distribution operations, which could service a variety of clients and customers for both import and exports. These operations would service the transport, postal and warehousing, which is the ninth largest employer in Australia (refer Figure 48). In February 2010, Southern Queensland accounted for 10% of the Australia's employment in this sector (ABS Labourforce Survey) and had seen significant additional jobs over the 5 year period to 2010. Given the reliance on the economy, however, this sector saw a decline in employment between 2009 and 2010 (ABS Labourforce Survey). Growth prospects for the sector are considerable, with 67,000 new jobs expected between 2010 to 15 (refer Figure 49). This would represent an average annual increase of 2.3 percent in the industry.

Figure 48: Employment by Industry, '000 – May 2010, Australia

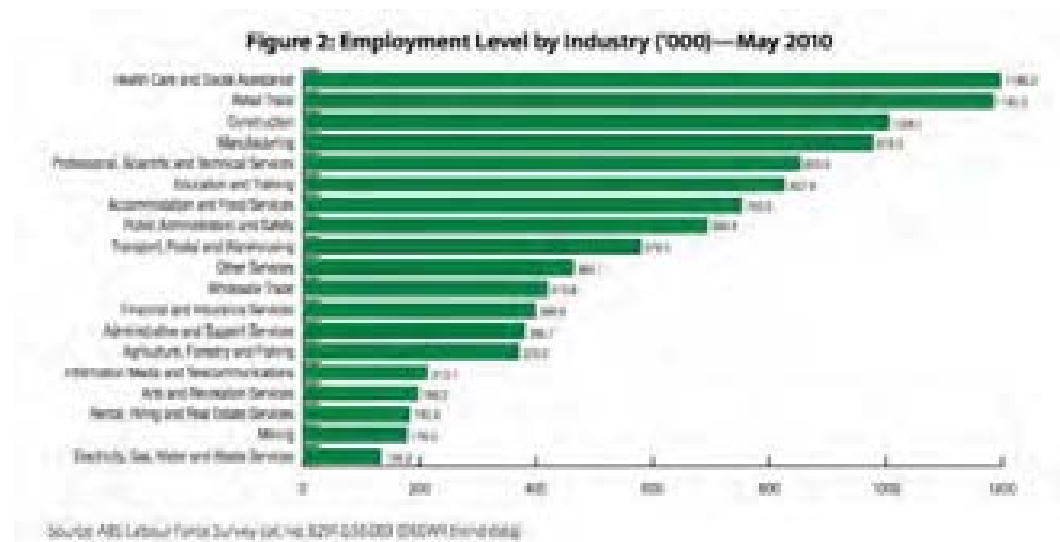
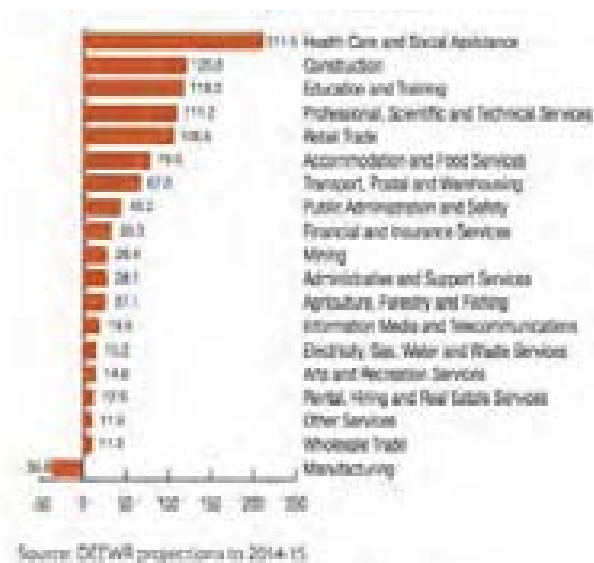


Figure 49: Projected Employment Growth by Industry, '000 – 2011 - 2015, Australia



The strengths of the Moreton Bay region that provide support to this sector includes a large existing workforce with appropriate skills, sufficient industrial land with transportation infrastructure, proximity to the Port of Brisbane for import and access to road infrastructure for distribution. However, the likelihood of this sector successfully operating in the rural areas is in CChange's opinion limited. As was the case for the building product manufacturing sector, this sector relies on large industrial land parcels, of which the rural areas do not have significant tracts. In addition, the transport and logistics area requires low to minimal impediments with regard to accessing key markets (such as high population areas, port and airports) and as many of the routes in the rural areas are not directly linked to the major market, the transport and logistics sector may find it difficult to effectively operate in the rural areas. There are likely to be intervening opportunities within the north-south spine of the Bruce Highway and/or in the urban areas of Moreton Bay that could more appropriately fulfil this role.

The transport and logistics sector often require non-school or no qualifications, and the sector employs many mature age people (ABS Labourforce Survey). Despite overall low numbers of employed persons in the rural areas, the types of skills and age groups required by the sector are present in the rural areas of Moreton Bay.

Negatives associated with expending considerable effort in attracting these industries include low employment densities and a likely conflict with valued attributes in the Region. That is:

- Even if a distribution centre was established, these centres are not generally high density employers. As such, establishment of this sector in the rural areas is unlikely to yield substantial numbers of jobs for the rural population; and,
- The increased traffic and the road or rail infrastructure required to support this sector is likely to be in conflict with the lifestyle attributes of the rural areas.

Table 9: Assessment of the Likely Success in the Rural Areas Hosting the Transport and Logistics Industries

Would supporting the Transport and Logistics Sector in the Rural Areas....?		Comments
• Support the principal of promoting profitable and sustainable rural industries?	No	Appropriate industrial land not located in the rural areas, and no appropriate land in the rural areas that could host this activity has been identified.
• Assist in Moreton Bay diversifying its economic development base in a way that assists Moreton Bay become a thriving region of opportunity and more self contained	No	As noted, no appropriate land. If land was available this sector could assist the rural areas, however the number of jobs that would be generated is likely to be low.
• Be successful given the current skills and attributes of the workforce required to optimise	Potentially	In 2006 the number of people appropriately qualified for these industries was very low in the rural areas, but if this

Would supporting the Transport and Logistics Sector in the Rural Areas....?		Comments
the economic development opportunities? Could the skills and attributes of the workforce suit the industry in the future?		sector was to establish itself then appropriate skills are likely to be present.
Be successful given the infrastructure required to ensure that opportunities can be maximised?	No	Appropriate industrial land not located in the rural areas, and no appropriate land in the rural areas that could host this activity has been identified. Transportation routes not optimal in the area when compared to other industrial sites that are more proximate to key markets.
Enhance and protect the vibrant lifestyle and unique identity of the Moreton Bay Rural areas?.	No	Appropriate industrial land not located in the rural areas, and no appropriate land in the rural areas that could host this activity has been identified. The operation of this sector has the potential to conflict with the lifestyle attributes of the rural areas.

5.2.3 Clean Energy Initiatives

The Australian Government has dedicated considerable resources to assist clean energy initiatives (Clean Energy Future, 2011). A Clean Energy Plan has been prepared that aims to attract investment and develop research into new clean energy sources, such as solar, gas and wind. The Government considers this transformation as *“vital if Australia is to meet the environmental and economic challenges of competing in a low-pollution world”* (Clean Energy Future, 2011).

The Government’s plan includes:

- *“Introducing a carbon price*
- *Promoting innovation and investment in renewable energy*
- *Encouraging energy efficiency*
- *Creating opportunities in the land sector to cut pollution”.*

Clean Energy Australia acknowledges that there are significant *“barriers to cutting pollution in the land sector [which] limit farmers and landholders’ ability to contribute to and benefit from tackling climate change”*. The Australian Government is planning to spend around \$1 billion over four years to overcome barriers to participation, reward emissions reductions and recognise important biodiversity co-benefits.

Creating opportunities in the land sector to decrease pollution can directly benefit areas such as the Moreton Bay region's rural areas. Areas such as Chinchilla in Queensland are developing their own hybrid renewables project that can power up to 250 megawatts of power. The project, *Solar Dawn* is a proposed solar thermal power plant that will be built by a consortium including AREVA Solar and Wind Prospect CWP. It is expected that Solar Dawn will be operational by 2015. Consultation suggested that similar projects should be attracted to the Moreton Bay Region.

As noted in the information on Solar Dawn, the proposed project is a key component of the Australian Government's Clean Energy Initiative and part of the Australian Government's Solar Flagships Program. The program aims to *"provide the foundation for large-scale, grid-connected solar power and to accelerate the commercialisation of solar power in Australia"* (Solar Dawn Project Description).

Once completed, Solar Dawn will be one of the largest of its kind and one of the most environmentally responsible power production plants in the world. The land take associated with the project is 450 hectares. If a similar project was developed for Moreton Bay this land take would represent 0.2 percent of the land in Moreton Bay (Council information). Moreton Bay has a significant land mass and sunshine that could stand opportunities such as these in good stead. However, current levels of land fragmentation may hinder the success of such opportunities. Further investigation of these initiatives would be required, however, as depending on the technology used and the location of the project, issues such as cloud cover, the level of winds and land use issues may impact its delivery. In addition, the comparative advantages of the Moreton Bay Region over other areas would need to be investigated, as would the level of resources Council wished to invest in trying to attract such an initiative/s.

An assessment of the Clean Energy Sector's likelihood of success in Moreton Bay is provided below.

Table 10: Assessment of the Likely Success in the Rural Areas Hosting the Clean Energy Sector

Would supporting the Clean Energy Sector in the Rural Areas....?		Comments
Support the principal of promoting profitable and sustainable rural industries?	Potentially yes	Initiatives such as these may be appropriate for the rural areas of Moreton Bay. However, further investigations would be required into land fragmentation and climate requirements to maximise outputs.

Would supporting the Clean Energy Sector in the Rural Areas....?		Comments
Assist in Moreton Bay diversifying its economic development base in a way that assists Moreton Bay become a thriving region of opportunity and more self contained	Potentially yes	Clean energy initiatives could be a great way to diversify the economy. Employment generation could be significant in the construction of project/s. Ongoing employment
Be successful given the current skills and attributes of the workforce required to optimise the economic development opportunities? Could the skills and attributes of the workforce suit the industry in the future?	Potentially yes	In 2006 the number of people appropriately qualified for in the engineering and related industries was low in the rural areas, nonetheless the proportion of people in these industries was the highest in all rural areas. Training initiatives should be encouraged for the rural area's populations to attract more people to these fields if projects are considered worthwhile.
Be successful given the infrastructure required to ensure that opportunities can be maximised?	Potentially yes	Investigations would be required into the extent of land fragmentation, land use conflicts and requirements for successful technology operations to determine what was required to support this industry sector Land fragmentation may hinder these opportunities unless agreement between land owners could be obtained.
Enhance and protect the vibrant lifestyle and unique identity of the Moreton Bay Rural areas?.	Potentially yes	This industry sector is potentially very well suited to the rural areas of Moreton Bay

5.2.4 Moreton Bay as a 'home' for non-resident workers in the resource industry

Another area suggested through consultation as holding potential for economic growth was for Moreton Bay rural areas to become a 'home base' for non-resident workers in the resource industry.

The mining and related sectors are significant industries in Australia, particularly in Western Australia and Queensland. The sector employed approximately 239,000 persons¹¹, full time and part time in 2010 Australia-wide and is forecast to grow by over 284,000 in the 5 years to 2015. Employment in the Mining industry is forecast to have the highest rate of projected growth of any Australian industry (6.1 percent per annum). Coal Mining is projected to experience the strongest employment growth within the industry (up by 7.7 per cent per annum), closely followed by Metal Ore Mining (7.6 per cent per annum), and Oil and Gas Extraction (7.3 per cent per annum). The median age for workers in this industry is 40 years and median earnings are around \$1923 per week (before tax) for full-time employees (ABS Labourforce Statistics and DEEWR forecasts).

Housing resource workers is a significant issue and an area that has had (and will continue to have) considerable attention. Often resource towns have a lack of supply of housing, given labour requirements, which can often lead to the erosion of an affordable housing base and other considerable strains on the social fabric of communities. In addition to housing, many areas rich in resources lack the economic diversity, community infrastructure and amenity to sufficiently support a two-income family (with or without dependents) and it can therefore be difficult to attract resource worker families to these areas. The relatively recent change in rosters for many sectors, (from 8 hour shifts to continuous 12 hour rosters) has had significant impact on the fabric of regional town societies through less interaction with sporting clubs, volunteer groups and social events (Ausimm). A means to overcome the housing strains and lifestyle issues is to have a significant component of the workforce as 'fly in / fly out'. In some cases, as an acknowledgement of the shortage of houses in regions, Government's have approved projects that have 100 percent of the construction workforce as fly in / fly out. BMA's Caval Ridge project is an example of this. A recent article in the Courier Mail indicated that the McDonalds in Moranbah is also considering fly in / fly out arrangements for their workforce given the scarcity of labour in the area due to the mining sector (Courier Mail, 24/2/2012).

Although in CChange's view significant fly in / fly out workforces are not an optimal outcome for communities, given labour requirements and housing shortages, the reality is that this phenomenon will be present for some time. With this phenomenon comes an opportunity, for lifestyle regions to capitalise on being the 'home base' for fly in / fly out workers.

Moreton Bay may wish to investigate the appropriateness of their region to house families of fly in / fly out workers. However, there are likely to be considerable

¹¹ This includes the 'mining' industry in Figure ... plus other related areas, such as components of the construction industry.

constraints to achieving major successes in this area. Based on surveys completed by the Minerals Institute (2010), fly in fly out populations prioritise the following attributes with regards to their 'home' base:

- Access to a broad range of educational, health, social and other facilities in capital cities or larger regional centres. In particular, those with secondary school-aged children valued the access to a variety of secondary schools, particularly private schools.
- Good career and employment opportunities for partners and children, often with a preference for a capital city location;
- Efficient access to airports servicing the fly in / fly out location; and,
- A coastal location is often preferred.

Although Moreton Bay does have components of the above attributes, it is arguable that there are many other areas, such as Brisbane and the Gold Coast that have higher comparative advantages. In addition, it is not clear as to the extent to which focussing on this industry would be in conflict with the overall policy noted in the SEQ RP to limit expansion in rural residential areas.

An assessment of the likelihood of success in Moreton Bay being a 'home' base for fly in fly out workers is provided below.

Table 11: Assessment of the Likely Success in the Rural Areas being a Home Base for Fly In Fly Out Workers

Would supporting the Rural Areas in the Moreton Bay region being a 'home base' for resource FI/FO workers?		Comments
• Support the principal of promoting profitable and sustainable rural industries?	Potentially	The FI/FO workforce is generally have higher than median incomes. If there was increased population in the rural areas associated with this workforce, the population would be able to utilise the rural areas centres, services and facilities. This would support rural industries. However, to capitalise on this opportunity in a significant way, considerable increases in populations in the Rural Areas would be required. This is contrary to the intentions of the SEQ RP.
• Assist in Moreton Bay diversifying its economic development base in a way that assists Moreton Bay become a thriving region of opportunity and more self contained	No	Although some benefits would be present if this initiative was to be successful, its unlikely that the presence of more people would, in itself, assist in diversifying the economic development base. As state above, it may, however, assist in making existing industries and businesses more profitable and sustainable.

Would supporting the Rural Areas in the Moreton Bay region being a 'home base' for resource FI/FO workers?		Comments
Be successful given the current skills and attributes of the workforce required to optimise the economic development opportunities? Could the skills and attributes of the workforce suit the industry in the future?	NA	Attracting families of FI/FO workers has less to do with skills and attributes of the current workforce and more to do with the social and employment opportunities. In the coastal areas, the rural areas contain opportunities associated with a coastal lifestyle region, however, the associated economic, social and community opportunities in these areas are limited. In addition the housing stock is of a mixed standard and may not be attractive to the high income families.
Be successful given the infrastructure required to ensure that opportunities can be maximised?	No	As noted above, attracting FI/FO workers requires a mix of economic, social and community opportunities, and currently these are limited in the rural areas. In addition the housing stock is of a mixed standard and may not be attractive to the high income families.
Enhance and protect the vibrant lifestyle and unique identity of the Moreton Bay Rural areas?.	Potentially	If FI/FO workers' families interact in the rural communities, attracting families associated with FI/FO workers may contribute to the lifestyle and identity of the rural areas.

5.2.5 Tourism

The SEQ RFS outlines tourism and outdoor recreation as key areas of focus for rural Queensland. As noted in Section 4, the main centres serving the rural areas can be, in themselves, a magnet for tourism as they have their own unique identity and charm, a good range of retail goods and services (in most centres), and an appealing amenity that includes community infrastructure. However, also noted in Section 4 was the need to encourage key tourism outlets in many centres and the need for a branding/marketing strategy that specifically advertises the benefits of frequenting the centres. Regardless of other initiatives in Tourism, it is recommended that a branding / marketing strategy be undertaken as part of a broader tourism strategy for the rural areas of Moreton Bay Region and/or Moreton Bay Region in its broadest sense (ie. from Redlands to Moreton

Bay Region). This strategy should be cognisant of the market segments that are most likely to be attracted to the rural areas of Moreton Bay.

In addition to the centres, other opportunities for tourism that should be investigated in detail include the development of the bed and breakfast industry (including farm stays and other 'rural experiential' stays), the development of the winery industry (although it is noted that the growing requirements of this industry are specific and Moreton Bay may not be the most appropriate area compared to other areas in Queensland and Australia), the development of further opportunities in low impact tourism for key natural attractions in the Moreton Bay area, and events and festivals.

Events and festivals are particularly relevant for Moreton Bay's rural areas as there are already a number of events in the Moreton Bay area that contribute to the economy of the area¹² (refer Figure 50).

Figure 50: Major Events in the Broader Moreton Bay Region

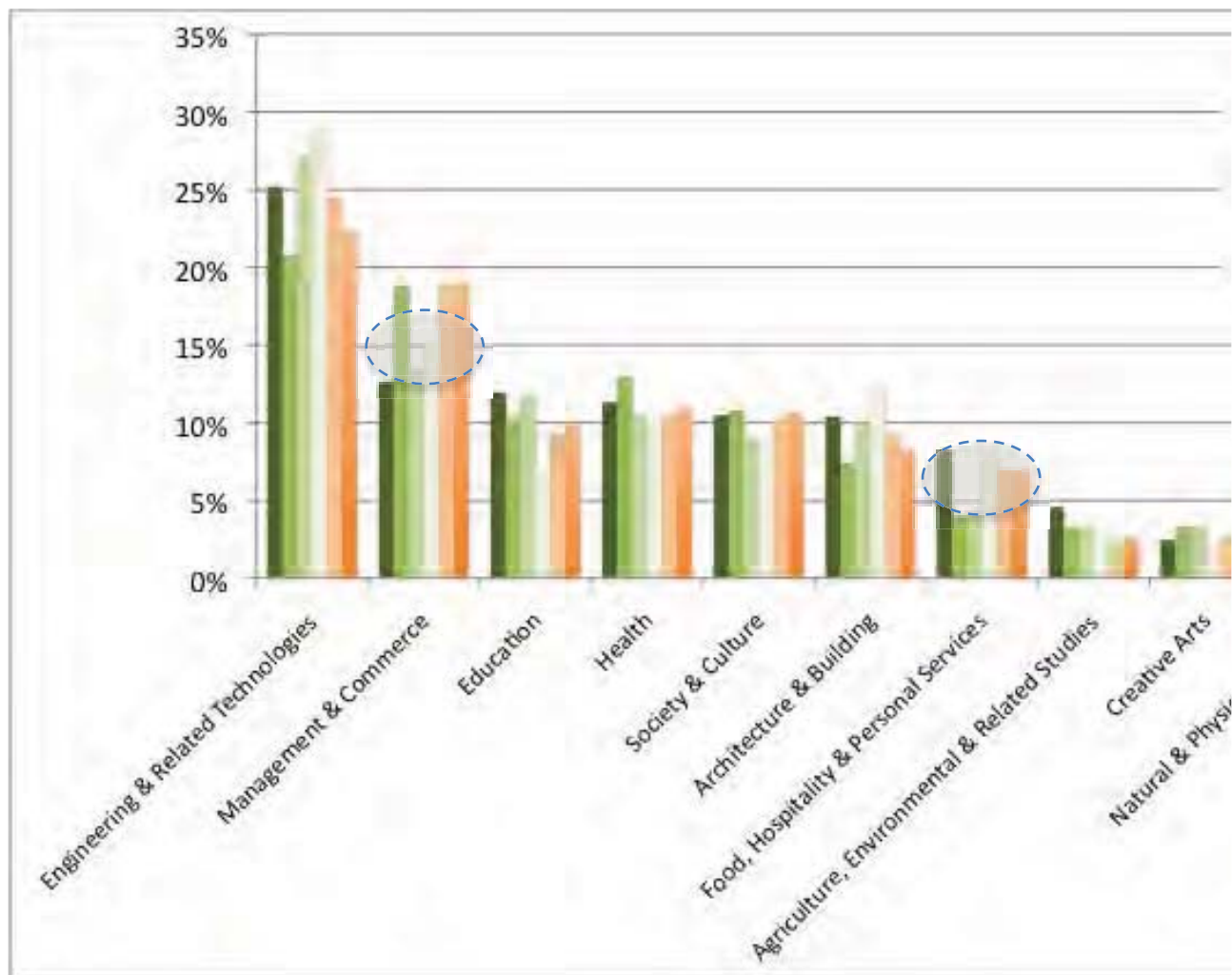
January
Aquatic Beach Party, Bongaree
Fish, Fun & Aquatic Race, Redcliffe
Music by the Sea, Sandgate
Australia Day Rally, Ormiston
Ragga Mafia, Strathpine
March
Weekend - The Tangalooma Ocean Swim, Moreton Island
April
Brisbane to Gladstone Yacht Race, Shorncliffe
Redcliffe Festival of Sails, Sylvania Beach
Blue Water Festival, Sandgate & Shorncliffe
May
Redcliffe Kitchfest, Clontarf
Urban Country Music Festival, Caboolture
Pine Rivers Festival, Pine Rivers
June
Indigi Day Out, Capalaba
The Dressing, Woodford
July
Abbey Medieval Festival, Caboolture
Farm Fantastic, Caboolture
Flinchers Day, Coochemulla Island
Splendour in the Grass, Woodford
August
Moreton Bay Fishing Classic, Manly Boat Harbour
September
Redcliffe First Settlement and Superboat Grand Prix, Redcliffe
Redfest - Redlands Spring Festival, Cleveland
October
Manly Harbour Village Halloween Street Party, Manly
Straddle Salute, North Stradbroke Island
Straddle Assault, North Stradbroke Island
Music Beneath the Stars, Ormiston
Island Vibe Festival, North Stradbroke Island
December
Day on the Green, Mt Cotton
Woodford Folk Festival, Woodford

¹² It is noted that the list in Figure ... includes the broad Moreton

As noted in Section 2, the well renowned Woodford Folk Festival is held in Woodford at the Woodfordia site every Christmas period. This is a festival that has been in operation by the Queensland Folk Federation since 1994 and attracts over 20,000 patrons, performers, stallholders, volunteers and organisers to the event (<http://www.woodfordfolkfestival.com>). Also hosted at Woodfordia is Splendor in the Grass, which also has substantial crowds. Dreaming festivals are also hosted at the site throughout the year, and its estimated by Council that approximately 1000 people are attracted per event. The Woodfordia site could host a number of other events, should the demand be present. With regard to music festivals, there are mixed views regarding whether the significant growth seen in recent years can be sustained. Interviews held by Triple J and other prominent commentators in the music scene have indicated that while there are a growing number of people interested in festivals, and that there is increasingly a 'festival identity' associated with festival goers, festivals themselves are finding it difficult to differentiate their product and the band line ups (Triple J, podcasts, 2011, www.eventindustrynews.co.uk; www.fasterlouder.com.au). Nonetheless, given the rural nature of the area, it may be that a country and western line up, which could be similar but smaller in the early years to the country and western music festival in Tamworth, could be conducive to the Woodfordia site.

As noted in Section 2, there have been discussions within Council about Woodfordia hosting a limited number of retail goods and services tenancies. Given the floorspace analysis conducted by both CChange and AEC, currently and into the future the Woodford centre has ample floorspace to service the surrounding area. Should more retail floorspace be added at Woodfordia, it is likely that this will detract from Woodford, which would not be in the interest of the Moreton Bay region. Rather than provide services at Woodfordia, initiatives to ensure that people at key events and festivals can easily access Woodford should be considered.

Although there is potential for the tourism industry to be further promoted in Moreton Bay, there would need to be skills imported or developed in the Region. Based on the 2006 Census, there is currently low proportions of people holding skills in management and commerce (particularly for Woodford, Dayboro and their surrounds), and food, hospitality & personal services (particularly for Samford, Dayboro and their surrounds) (refer Figure 51).

Figure 51: Skills held by Residents in 2006

Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

An assessment of the potential for Moreton Bay rural areas to further capitalise on the Tourism Sector is shown below.

Table 12: Assessment of the Likely Success in the Rural Areas capitalising on Tourism

Would supporting the Tourism Sector in the Rural Areas....:		Comments
Support the principal of promoting profitable and sustainable rural industries?	Potentially	Research into the tourism industry and profitable sectors would need to be investigated in detail. Areas to concentrate on include: the rural centres, bed and breakfasts, 'farm stays', other rural experiences, potentially the wine industry (although Moreton Bay is likely to be less attractive to this industry compared to other areas in Queensland and Australia), festivals and events.

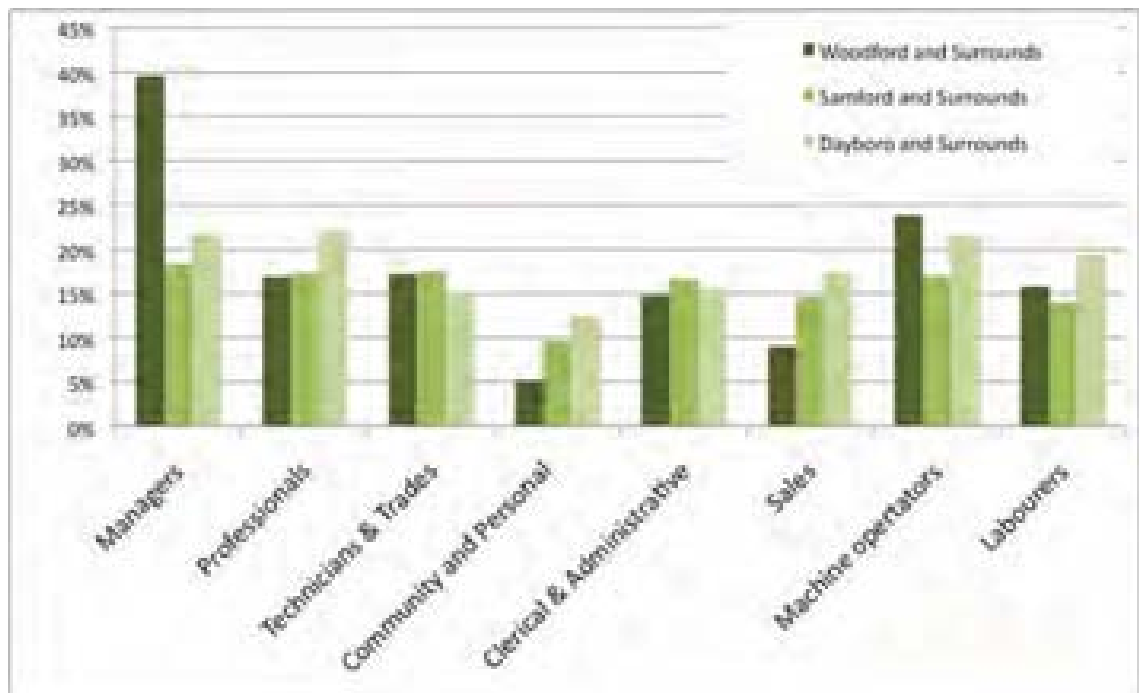
Would supporting the Tourism Sector in the Rural Areas.....:		Comments
		A comprehensive and unique branding and marketing strategy would also be required.
Assist in Moreton Bay diversifying its economic development base in a way that assists Moreton Bay become a thriving region of opportunity and more self contained	Yes	Tourism opportunities would diversify the economic development basis and given the usual 'local' nature of operations, this would assist self containment in the area. However, the jobs usually created in these sectors are often casual jobs, with a large proportion dedicated to the service sector. The number of opportunities available is unknown and would need to be investigated fully. However, it is unlikely that this sector would be able to 'replace' the employment opportunities associated with the declining rural sector. LRAM's report outlines the rural sector and its current and likely future declines.
Be successful given the current skills and attributes of the workforce required to optimise the economic development opportunities? Could the skills and attributes of the workforce suit the industry in the future?	Potentially	In 2006 the number of people and proportion of appropriately qualified for these industries was very low in some of the rural areas. Training initiatives should be encouraged for the rural area's populations so that residents can capitalise on opportunities.
Be successful given the infrastructure required to ensure that opportunities can be maximised?	No but...	Tourism opportunities would need to occur in appropriate areas. Land use issues or potential conflicts would need to be considered.
Enhance and protect the vibrant lifestyle and unique identity of the Moreton Bay Rural areas?.	Potentially	Tourism opportunities should be developed in line with maintaining and enhancing the lifestyle and unique identity of the Moreton Bay Rural Areas.

5.3 Anticipated Future Employment Structure of Rural Areas

As discussed in LRAM's report, the prominent rural sector that currently underpins Moreton Bay Region's Rural Areas is in decline and future prospects for this sector seem bleak. A decline in the employment opportunities for the rural sector would substantially change the employment structure of the rural areas – particularly Woodford. Unless significant employment prospects are provided, the best case scenario is that many of the employed residents in the rural areas will need to secure jobs in the urban areas of Moreton Bay, and the worst case scenario is that unemployment will increase.

Analysis of the 2006 ABS Census 'occupation by age group' also adds a compounding issue for the rural areas. In 2006 a high proportion of people in various occupations, particularly managers in Woodford (which are likely to refer to agricultural operations) (refer Figure 52) were over the age of 55. Given that the 2006 Census is now 5 years old, it is likely that a high proportion of these people are either retired or close to retiring. If the rural areas cannot attract people to replace these retirees, then further impacts on the employment base will result. In addition, the ageing of the population in the rural areas is likely to have considerable impact on the demand for social and community services. Although beyond CChange's current scope of works, it is highly recommended that a social and community needs assessment is completed for the Rural Areas. Checks regarding employment structure from the 2011 ABS Population and Household Census should also be undertaken when the data is released.

Figure 52: Proportion of Employed People over 55 by Occupation



Source: OESR Consultancy Data, From 2006 ABS Population and Household Census

Apart from the agricultural sector, the other major employer in Rural Areas is the Woodford Correctional Centre. With approximately 350 employed persons with a number of these from areas outside the region, there is an opportunity for local residents to seek employment opportunities at the Centre. However, as well as administrative and catering types of position, as noted previously, much of the employment opportunities are professional staff and custodial staff that require specific

skills sets. The Woodford Correctional Centre has a business partnerships program, which seeks to provide meaningful work to prisoners. In the past prisoners have had chances to develop skills in metal work, wood work, spray painting and textiles, and have been able to gain vocational education qualifications. The work conducted is based on an import replacement model and therefore no local jobs are 'lost' due to the prisoners involvement in developing products. Apart from this program, however, there have been no identified associated economic development opportunities that would also add value to employment for residents. The Woodford Correctional Centre has been in its current form in the Region for 15 years and there are no plans to change the centre from its current state into the longer term.

Given the likelihood of losing employment opportunities in the region and a significant number of employees likely to have or be in the process of retiring, ensuring that there are alternative economic development opportunities available to the rural areas should be a high priority of Council.

6 Conclusions and Recommendations for Strategy

As noted in the introduction, CChange's role in the Rural Areas Strategy was to:

- Clearly identify the role and function of the Region's rural centres;
- Identify and describe the current and anticipated employment structure of the various place types within the study areas; and,
- Identify opportunities to future develop rural enterprises.

CChange was requested to concentrate on centres in the western rural areas in the Moreton Bay Region and on the economic development potential for opportunities such as tourism and other elements noted in the Council's EDS. LRAM, a core component of the consultant team, are expert in rural lands and rural industries and therefore part of their role was to determine how value can be added to existing and future primary production.

Major findings and recommendations are noted below.

6.1 Moreton Bay's Main Rural Centres

Based on the research and analysis conducted as part of this report it is clear that Moreton Bay's rural centres – Woodford, Dayboro and Samford - are a highlight of the Region. The main rural centres are currently fulfilling roles that are conducive to their main catchment areas and can be described as successful rural towns/centres. They each have a unique identity and a very strong sense of community. In varying capacities, each centre has:

- An appropriate mix of retail goods and services, with all centres placing a high value on customer service/experience;
- Service sector tenancies that cater for the local market;
- Are considered the cultural and community heart of the community to which they primarily serve;
- Have key focal point/s for community meetings and events;
- Include many appropriate community and government services
- Are attractive, safe and inviting and have recreation, leisure and (to varying degrees) entertainment opportunities;
- Are generally legible and safe and have a focus on placemaking (although some could have improvements in this regard); and,
- Incorporate the area's broader history.

The tourism elements of each of the centres could be improved, and the housing mix could be diversified to cater for aging or young adult households.

A summary of how each centre 'scored' in relation to the above dot points is shown in Table 13 and improvements that would benefit the Centres are listed in Table 14. These improvements could be influenced through Local Area Plans for the Centres, and there may be some land use implications from arising actions.

Table 13: Summary of Moreton Bay Rural Area's Centres

Criteria	Woodford	Dayboro	Samford
An appropriate mix of retail goods and services, with a high value on customer service/experience	✓✓✓	✓✓	✓✓✓
Service sector tenancies that can cater for the local market	✓ x	✓ x	✓✓
Be considered the cultural and community heart of the community	✓✓✓	✓✓✓	✓✓✓
Key focal point/s for community meetings and events	✓	✓✓✓	✓✓✓
Appropriate community and government services	✓✓	✓ x	✓✓
Attractive, safe and inviting recreation, leisure and entertainment opportunities	✓✓ x	✓✓	✓✓✓
Legible and safe street and tenancy layouts that have a focus on placemaking	✓ x	✓ x	✓✓
A tourism element	✓ x	✓ x	✓✓
History incorporated	✓✓	✓✓	✓✓
Caters for a variety of households	x	x	x

Table 14: Summary of Opportunities to Enhance Moreton Bay Rural Area's Centres

Improvements that would benefit the Centres		
Woodford	Dayboro	Samford
- The development of well defined meeting areas / public spaces could be provided. Currently many community groups use the cafes for meetings. Further exploration regarding requirements would be useful - Pedestrian and parking safety is an issue. - Recreation, leisure and entertainment needs improvement - Some services are provided, but potentially room for expansion here - Placemaking a focus, but could be further improved - Amenity improvements to soften the façade of the Woolworths would be beneficial - With regards to Tourism, the centre is considered a 'stop off' when passing through to festivals or other events, rather than a tourist attraction in itself. Improvements required in tourism and marketing. - Some residential, but not a diverse mix. Detailed investigations of region's needs has been prepared by Buckley Vann.	- A range of retail goods and services are provided in the centre. Further diversity would benefit the centre. - Some services are provided, but potentially room for expansion here - Some community and government services provided. Further investigation would be required to determine whether adequate for population - Road legibility an issue - Could improve tourism elements – has some attractions, but needs further ones. Needs marketing. - Some residential, but not a diverse mix. Detailed investigations of region's needs has been prepared by Buckley Vann.	- Good level of community spaces and services provided, but few government services. Adequacy of government services would require in-depth investigation. - Legible layout but pedestrian crossings could be provided to assist centre functioning. - Anecdotal information suggests good day tripper patronage. However, - more marketing could assist. Investigation of the introduction of local markets would be worthwhile - Some residential, but not a diverse mix. Detailed investigations of region's needs has been prepared by Buckley Vann.

Broad floorspace analyses conducted for the study indicated that there is ample floorspace at most of these centres now and into the future. Dayboro has some scope for increasing floorspace, however, any additional floorspace would be best placed if

directed towards tourism and non-essential food tenancies. For Woodford and Samford it is unlikely that more floorspace will be required at the Centres even at 2031. Overall, it is recommended that the centres' roles and floorspace remain as they were in 2012.

6.2 Potential Economic Development Moreton Bay's Main Rural Centres

Much research and analysis was conducted for this report to determine the potential economic development opportunities for Moreton Bay's Rural Areas. All economic development opportunities explored kept Council's EDS vision in mind: foster[ing] a vibrant, sustainable and knowledge-driven economy that creates valuable employment for residents, protects the region's high quality of life and provides a prosperous future for all residents.

The framework utilised to determine potential opportunities for the rural areas included ensuring that:

- Industry recommendations supported the principal of promoting profitable and sustainable rural industries;
- Recommendations can assist Moreton Bay diversify its economic development base in a way that assists self contained;
- The skills and attributes of the workforce required to optimise the economic development opportunities in Moreton Bay are either present or are considered developable;
- The infrastructure required to ensure that opportunities can be maximised is planned or provided; and,
- All recommendations made enhance and protect the vibrant lifestyle and unique identity of the Moreton Bay Rural Council.

The investigations completed clearly showed that Council need to devote resources into developing economic development opportunities for Moreton Bay's Rural Areas if they wish to maintain, let alone increase employment in the region. This is particularly the case given the expected decline of the current rural industries (refer LRAM's report).

Recommendations for Council regarding economic development opportunities include investigating in detail opportunities associated with the following. In addition, investigation into appropriate types of home based businesses and their requirements is recommended. Land use implications of proceeding with industries noted below should be highlighted in the investigations;

- Clean energy initiatives, both generally across the rural areas, and specifically to assist businesses in rural industries that are in decline. Land use implications are likely to be ensuring that appropriate areas can flexibility cater for clean energy initiatives;
- Tourism initiatives, particularly focussing on: the main rural centres of Woodford, Dayboro and Samford; establishing further boutique bed and breakfasts, 'farm stays'; other rural experiences such as agro-eco-friendly tourism such as 'working farms or value adding'; potentially investigating the wine industry; and, growing the festivals and events market in the Region with a

particular emphasis on lifestyle and rural events. Land use implications include ensuring that tourism operations can be operated in appropriate areas;

- The potential and likely success for the rural areas to host transport and logistics infrastructure (although as noted in the main body of the report, even if this sector is successful, the employment outcomes are not likely to be significant given low employment densities of such uses). Investigations into the location of further appropriate industrial land would be required;
- Other opportunities associated with attracting FI/FO workers or the building manufacturing sector could also be investigated. However, as noted in the body of the report, major employment and economy gains to the rural areas are not expected unless there are considerable population increases (for FI/FO opportunity) or increases in industrial land (for building manufacturing sector). Considerable increases in population is contrary to the aims of the SEQ RP.

In addition to the above it is recommended that Council consider:

- Developing a Tourism Strategy for the Rural Areas, and linking this to the broader Moreton Bay Region. The Strategy would need to determine key markets and key attractions such that the focus on the identity and lifestyle attributes of Moreton Bay is preserved and enhanced;
- Undertaking a Branding and Marketing Strategy for the rural areas, with an emphasis on the main Centres as well as other tourism attributes;
- Develop the main Centres to reach their potential as suggested in the preceding section.

6.3 Current and Future Employment Structure of the Moreton Bay Rural Areas

Section 3 outlined the current structure of Moreton Bay's rural areas in detail. In summary Woodford and surrounds employment base is focussed in agriculture and public administration and safety, and the other rural areas are more diverse. Dayboro and surrounds have a variety of sectors employing its residents including electricity, water and waste services and construction while Samford had more residents employed in professional, scientific and technical services, information media and telecommunications and financial and insurance services. The Coastal areas had a mix of many industries.

LRAM's report shows that the rural sector that currently underpins Moreton Bay Region's Rural Areas, and particularly Woodford and surround's economy, is in decline and future prospects for this sector seem bleak. A decline in the employment opportunities for the rural sector would substantially change the employment structure of the rural areas – particularly Woodford. Unless significant employment prospects are provided, the best case scenario is that many of the employed residents in the rural areas will need to secure jobs in the urban areas of Moreton Bay, and the worst case scenario is that unemployment will increase.

Analysis of the 2006 ABS Census 'occupation by age group' also adds a compounding issue for the rural areas. In 2006 a high proportion of people in various occupations, particularly managers in Woodford (which are likely to be managers of agricultural

operations) were over the age of 55. Given that the 2006 Census is now 5 years old, it is likely that a high proportion of these people are either retired or close to retiring. If the rural areas cannot attract people to replace these retirees, then further impacts on the employment base will result. In addition, the ageing of the population in the rural areas is likely to have considerable impact on the demand for social and community services.

Given the above trends and likely results, it is recommended that:

- Council complete a social and community needs assessment for the Rural Areas;
- Verification of the 2011 employment structure of the rural areas is undertaken when the 2011 ABS Population and Household Census data is released;
- Accessibility between Council's rural areas and urban employment nodes is maximised; and, importantly,
- Council place a high value on completing a comprehensive economic development strategy for the Rural Areas of Moreton Bay such that the likely decline in employment opportunities can be replaced and further employment opportunities be provided.

6.4 Conclusion

In conclusion, there are many strengths associated with Moreton Bay Region's rural areas. The main centres are highlights of the regions and there are opportunities to strengthen these further. The main centres' tourism components could be further capitalised upon and the placemaking focus emphasised. If this was to occur, further value to the economy of the rural areas could result.

However, the agricultural industry, which features strongly in some parts of the rural areas, is in decline and thus diversification of employment is required. Currently, no significant additional employment initiatives are foreshadowed in the rural areas for the near future. Given the likely loss of employment opportunities associated with the agricultural industries in the region and the dearth of current existing opportunities for new employment opportunities in the rural areas, ensuring that the following occurs should be high priorities for Council:

- The Main Centres are working optimally and are promoted appropriately;
- The social and community infrastructure needs are assessed and where necessary provided for;
- Access between employment nodes in the urban area and residents' locations in the rural areas is maximised; and,
- Alternative economic development opportunities for the rural areas are investigated in detail.

Appendix 1: Minor Centres Description

(refer PDF Report)

Appendix 2: Broad Expenditure Analysis

Table 15: Household Expenditure Survey, Australia (2011): ABS 2009-10

		SAMPLE ESTIMATES BY HOUSEHOLD QUANTILE					All households
		Lowest	Second	Third	Fourth	Highest	
		ESTIMATES					
Average weekly expenditure							
Household expenditure group							
Goods and services							
Current housing costs (rented dwellings)	\$	134.35	171.85	234.25	351.47	552.25	331.475
Domestic fuel and power	\$	44.85	71.55	104.85	151.83	217.35	104.755
Food and non-alcoholic beverages	\$	44.25	133.15	188.85	238.15	347.85	188.855
Alcoholic beverages	\$	55.75	87.85	125.85	185.85	281.85	171.525
Tobacco products	\$	5.25	10.85	19.75	34.85	51.85	12.925
Clothing and footwear	\$	52.85	55.85	101.45	127.85	191.85	104.525
Household furnishings and equipment	\$	24.35	34.85	55.85	84.34	117.85	55.525
Household services and operation	\$	45.35	47.85	105.85	155.85	235.85	105.855
Medical care and health expenses	\$	12.85	41.85	115.85	171.85	257.85	104.425
Transport	\$	87.45	115.45	185.85	275.85	385.85	195.855
Recreation	\$	55.85	117.85	135.85	195.85	285.85	145.855
Personal care	\$	5.25	11.75	27.85	35.34	51.85	25.755
Maintenance goods and services	\$	10.85	15.85	35.85	105.85	175.85	107.525
Total goods and services expenditure	\$	551.25	835.45	1,178.85	1,854.84	2,548.85	1,248.855
Average annual expenditure							
Household expenditure group							
Goods and services							
Current housing costs (rented dwellings)	\$	7,055.75	9,052.25	12,165.45	18,402.85	29,272.25	17,205.475
Domestic fuel and power	\$	2,355.25	3,715.25	5,455.25	7,855.25	11,255.25	5,455.255
Food and non-alcoholic beverages	\$	2,315.25	7,015.25	9,855.25	12,315.25	18,015.25	9,855.255
Alcoholic beverages	\$	2,915.25	4,555.25	6,555.25	9,715.25	14,515.25	7,915.255
Tobacco products	\$	275.25	555.25	1,015.25	1,815.25	2,715.25	675.255
Clothing and footwear	\$	2,755.25	2,955.25	5,275.25	6,575.25	9,875.25	5,055.255
Household furnishings and equipment	\$	1,255.25	1,815.25	2,855.25	4,355.25	6,275.25	2,855.255
Household services and operation	\$	2,385.25	2,475.25	5,455.25	8,015.25	12,015.25	5,455.255
Medical care and health expenses	\$	655.25	2,185.25	6,015.25	8,855.25	13,015.25	6,015.255
Transport	\$	4,585.25	6,085.25	9,715.25	14,515.25	20,275.25	10,585.255
Recreation	\$	2,885.25	6,115.25	7,015.25	10,015.25	14,875.25	8,275.255
Personal care	\$	275.25	615.25	1,415.25	1,815.25	2,715.25	1,015.255
Maintenance goods and services	\$	555.25	7,015.25	4,000.25	9,700.25	14,000.25	6,700.255
Total goods and services expenditure	\$	32,471.85	43,442.25	61,888.85	97,915.85	135,758.25	64,558.855

Table 16: Broad Floorspace Analysis: Moreton Bay's Main Rural Centres: 2011 (CChange analysis, BV Dwelling Estimates)

Expenditure Analysis		\$				
		Lowest Quantile	Second Quantile	Third Quantile	Fourth Quantile	Fifth Quantile
Woodford		\$4,271	\$4,513	\$11,471	\$54,471	\$13,695
Dayboro		\$4,187	\$5,154	\$10,097	\$40,021	\$25,154
Samford		\$3,804	\$7,155	\$11,110	\$21,189	\$57,748
Total						
Supportable Floorspace						
		Lowest Quantile	Second Quantile	Third Quantile	Fourth Quantile	Fifth Quantile
Woodford	m ²	750	1,280	1,710	2,710	1,780
Dayboro	m ²	480	780	1,310	2,420	3,820
Samford	m ²	580	1,110	1,980	3,200	8,780
Total						
Assumed Capture						
		Food and non- alcoholic beverages	Alcoholic beverages	Tobacco products	Clothing and footwear	Household furnishings and equipment
Woodford		80%	80%	80%	20%	20%
Dayboro		70%	70%	70%	5%	5%
Samford		90%	90%	90%	20%	5%
Total						
Supportable Floorspace						
		m ²				
Woodford		4,800				
Dayboro		5,450				
Samford		8,100				

Table 17: Broad Floorspace Analysis: Moreton Bay's Main Rural Centres: 2031 (CChange analysis, BV Dwelling Estimates)

Expenditure Analysis		\$				
		Lowest Quintile	Second Quintile	Third Quintile	Fourth Quintile	Fifth Quintile
Woodford		\$7,194	\$9,811	\$11,110	\$14,134	\$13,461
Dayboro		\$3,495	\$5,771	\$11,062	\$17,571	\$27,634
Samford		\$4,009	\$7,791	\$11,929	\$22,481	\$40,182
Supportable floorspace Total						
		m²				
		Lowest Quintile	Second Quintile	Third Quintile	Fourth Quintile	Fifth Quintile
Woodford		1,090	1,480	1,980	2,500	2,050
Dayboro		530	870	1,670	2,610	4,200
Samford		610	1,180	2,500	3,600	9,310
Assumed Capture						
		Food and non-alcoholic beverages	Alcoholic beverages	Tobacco products	Clothing and footwear	Household furnishings and equipment
Woodford		80%	80%	80%	20%	20%
Dayboro		70%	70%	70%	5%	5%
Samford		90%	90%	90%	10%	5%
Supportable floorspace Centre						
	m ²					
	Total					
Woodford		5,000				
Dayboro		4,000				
Samford		8,500				

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- Personal Communications (December 2011): Discussions with Council's Economic Development Area
- Personal Communications (December 2011): Discussions with Councillors
- Moreton Bay Regional Council Corporate Plan
- Moreton Bay Regional Council Community Plan
- DEEWR (2011) projections to 2014-15
- Employment Outlook (2011), Transport, Postal and Warehousing, Australian Government Department of Education, Employment and Workplace Relations
- OESR Data (2011) – compiled from 2006 ABS Population and Household Census Data & Journey to Work data for Woodford and Surrounds, Dayboro and Surrounds, Samford and Surrounds, Coastal Areas and Surrounds
- Petkova, V., Lockie, S., Rolfe, J. & Ivanova, G. (2009) Mining Developments and social impacts on Communities: Bowen Basin case studies, Rural Society Vol 19 (3) 211-228
- Primary research (December 2011) Land Use surveys & site area analyses in Centres

Productivity Commission (2011) Economic Structure and Performance of the Australian Retail Industry No. 56, 4 November 2011, Commonwealth of Australia 2011

Reinhardt, W., Schmidt, B., Sloep, P., & Drachsler, H. (2011). Knowledge worker roles and actions – results of two empirical studies. *Knowledge and Process Management*, 18.3, 150-174. doi:10.1002/kpm.378

SEQ Regional Plan (2009 – 2031), Queensland Government

SEQ Rural Futures Strategy (2009), Queensland Government

Appendix 1: Minor Centres Description

D'aguiar

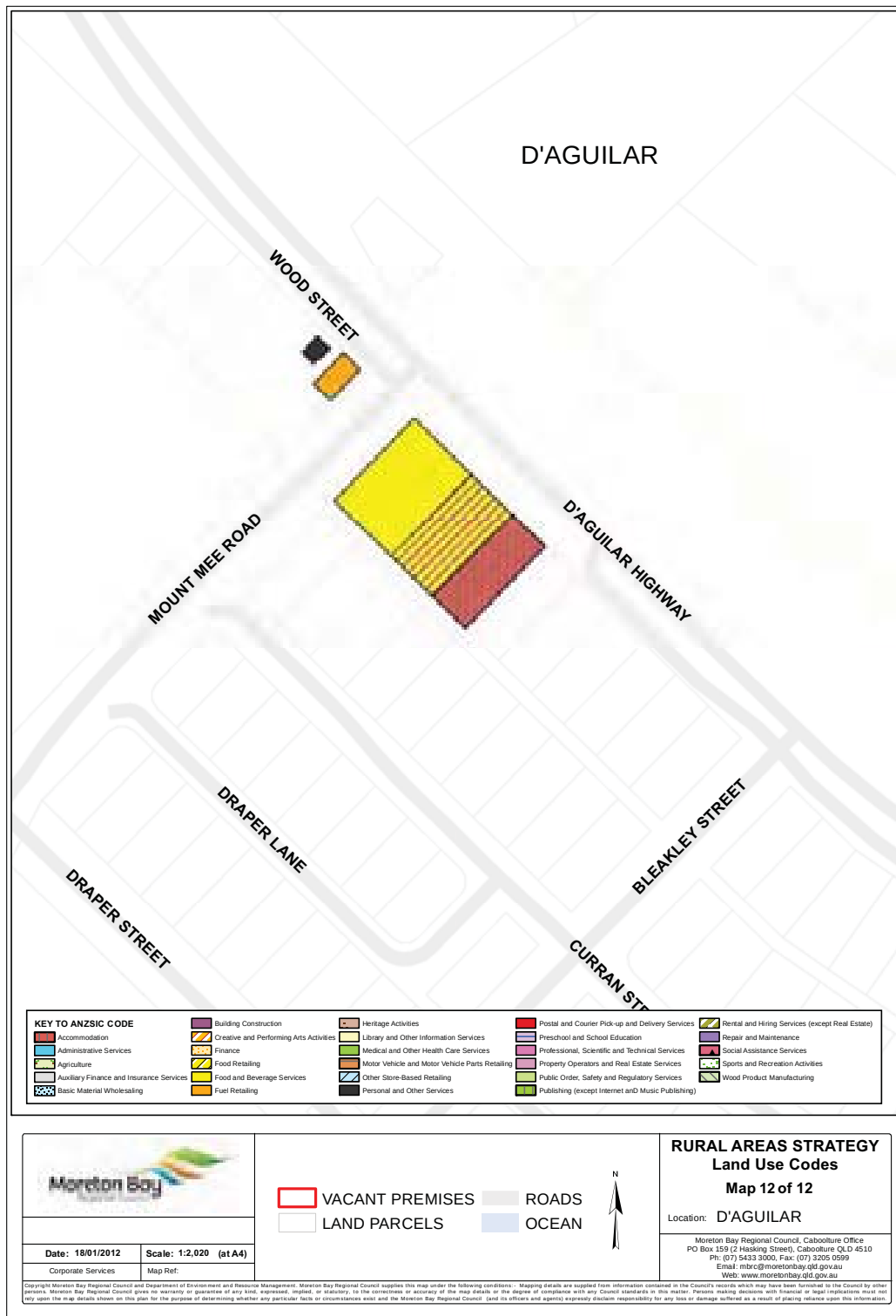
Overall Amenity: The centre is very small and portrays a somewhat aged appearance. The township is located on an intersection with Mount Mee tourist drive and D'Aguilar Highway. Traffic appears to be thoroughfare although there is patronage at the pub around 5pm. The town has limited amenity – with a very basic park with some park furniture

Conditions of Shops: The shops appear to be well kept despite the apparent age

Conflict areas: Being on a major road and a highway loud trucks pass through often. No pedestrian crossings although traffic appears to be such that road crossings could occur

Gateways to the Centre: A small sign indicates that the township exists.

Car parking: The Pub has sufficient parking although the hairdresser noted it was a small problem for their customers.



Wamuran

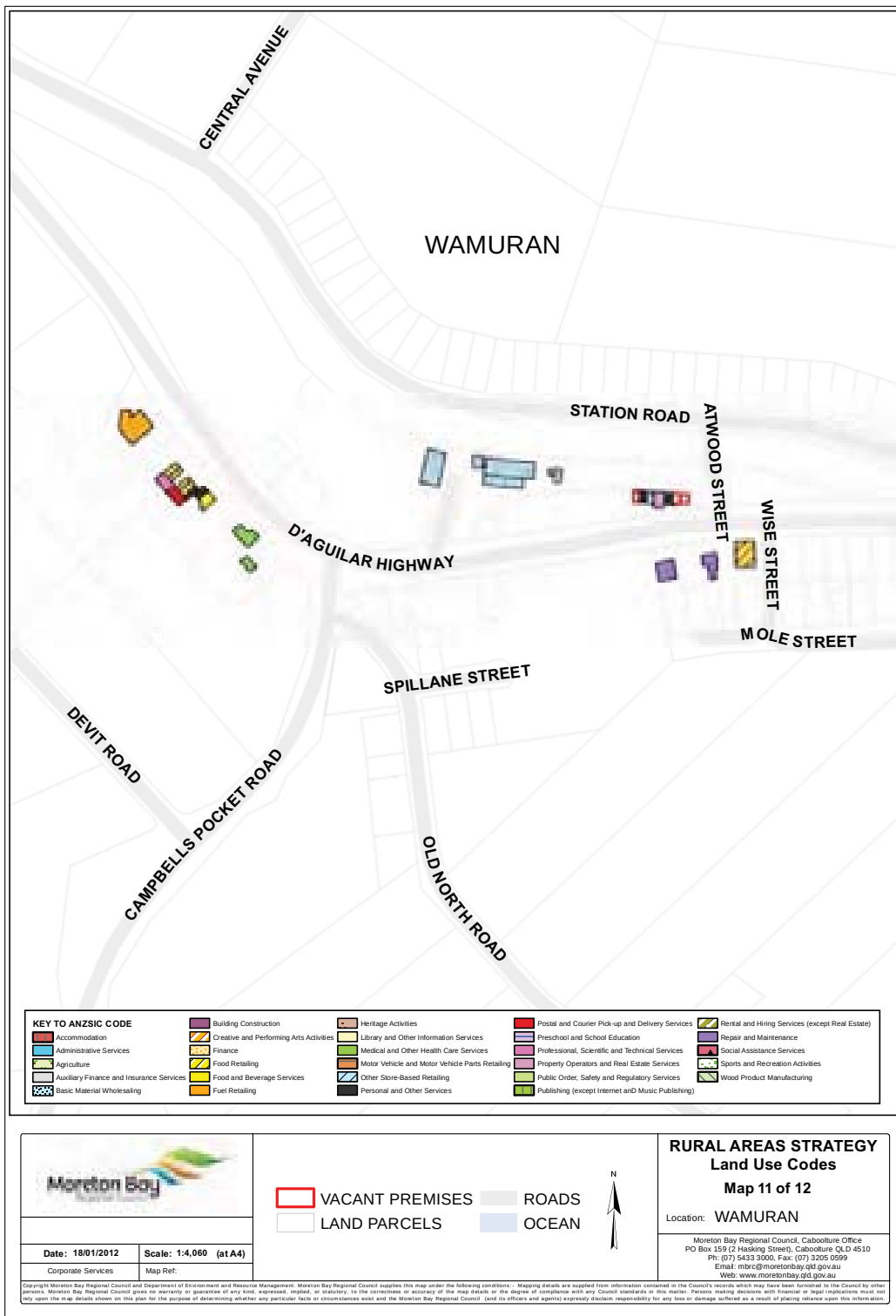
Overall Amenity: Arriving into Wamuran there is little identity present. However, there is a well maintained park upon entry to the main centre of town. The Wamuran State School appears to be well maintained and landscaped and takes place in the centre of town. The commercial hub of the centre is broken into two parts A and B. The Centre is neat with hedged gardens yet is simple compared to other centres. The streets appear to be free from litter or vandalism.

Conditions of Shops: Shops appear to be in good condition with a number of tenancies undergoing fitouts.

Conflict areas: At 15:30 there appeared to be a conflict between heavy through traffic and people wanting to cross the road. The School's pedestrian crossing service is trying to manage these flows. No other pedestrian crossings could be located within the centre. A number of loud trucks with trailers were passing though and most traffic was not stopping within the centre.

Gateways to the Centre: A simple sign indicates the beginning of Wamuran, although the acknowledgement of intensity and change in land uses indicates that the centre of town has been reached.

Car parking: 10 vehicles were at Centre A and it is estimated that the capacity for this facility is approximately 40. On street parking is available outside both centres. However is limited to 2hours immediately outside the school grounds. As indicated, most traffic is through traffic



Mt Mee

Overall Amenity: Community use and café at Mt Mee.

Conditions of Shops: Restaurant/café in very good condition as are the community uses

Conflict areas: All on same side of road, no conflict areas present at the visit.

Gateways to the Centre: Area seems to appear, no clear gateways

Car parking: Restaurant has sufficient parking, no consultation with community uses.

Mt Glorious

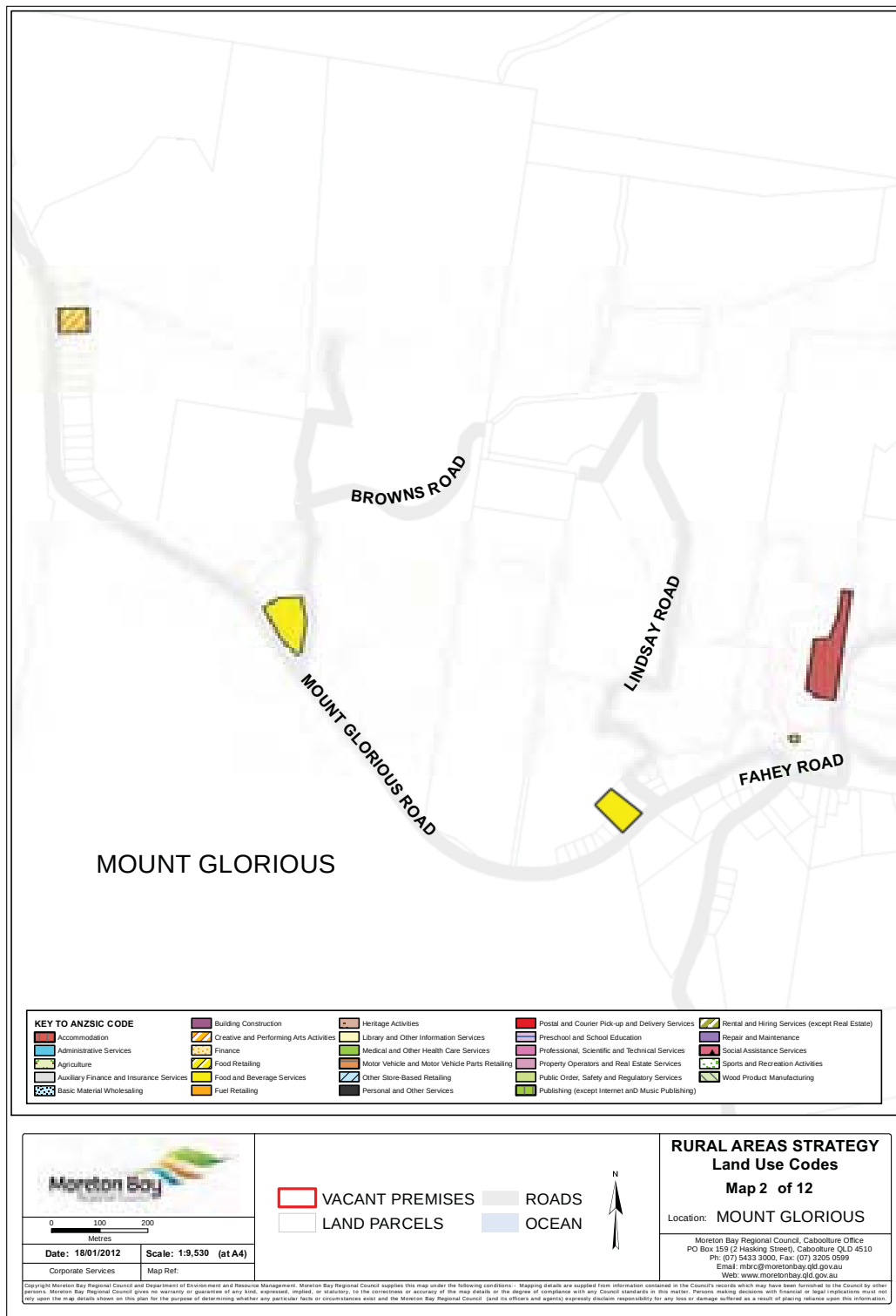
Overall Amenity: The overall amenity of the Mount Glorious is welcoming and attractive. Being situated aside a rainforest, the natural beauty of the area is a large draw card. Signs indicate that one has reached Mount Glorious village, yet it is difficult to determine where the 'Centre' is as the businesses are dispersed over some distance.

Amenity of the shops: All shops, restaurants and Cafés are in good condition and well looked after.

Conflict Areas: There are no apparent conflict areas. Although there is no where for pedestrians to walk the village. This would require attention if tourist attractions are further encouraged on the Mountain.

Gateways: It is not evident where the town boundary begins or finishes. The settlement suddenly appears out of the forest and suddenly disappears. The intensity of land use indicates the centre of the township. This may also confuse joy riders who appear to speed through the area despite the 50km/hr speed limit.

Carparking: Limited on street and off street parking exists. Off street parking is usually owned by competing businesses. No public parking is available nor is there footpaths for walking the village.



Mt Nebo

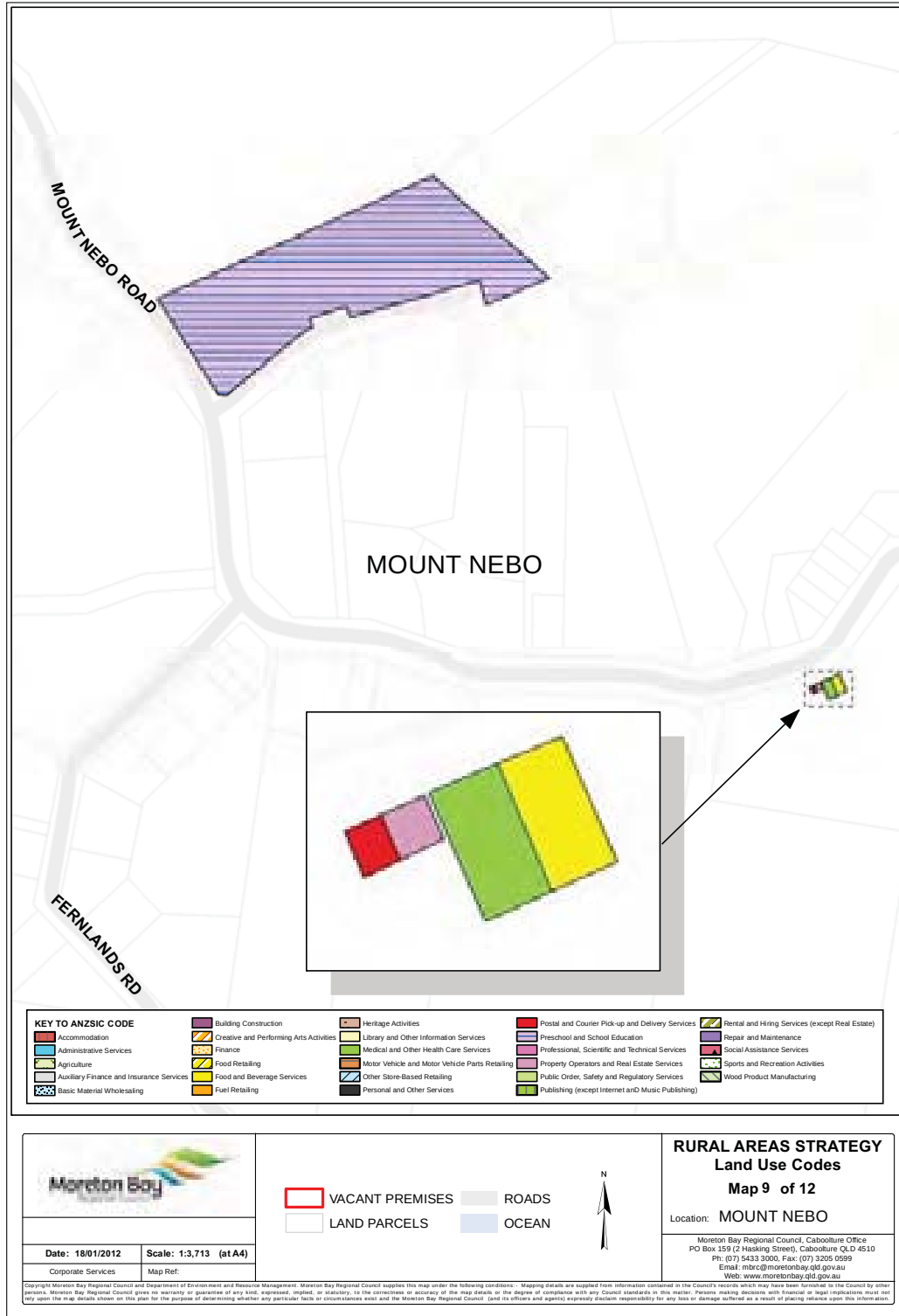
Overall Amenity: The Mt Nebo centre consists only of 4 shops. Which are located together. Little thought has gone into the appeal of the centre as it is located amongst a very leafy areas and it appears taming the natural growth is difficult. There is no sign of vandalism and the main shopping centre is welcoming and neat although slightly worn down. At around 16:00 a number of people were using the centre to pick up mail from the post office or other errands. Not many people stayed around long at the centre. Those that did were using the café, although it was a rainy day.

Amenity of the shops: Generally, the shops are in good condition, although the age of the complex is showing.

Conflict Areas: There are no visible signs of conflict areas. The only pedestrian links provided are outside the School premises indicating a very car dominant community.

Gateways: No signage was present when travelling to Mt Nebo that were 'welcoming'. Only road signs indicate the whereabouts of drivers.

Carparking: The centre has car parking capacity of 5 or more cars. During busy times it is likely that parking at the centre is an issue



Donnybrook

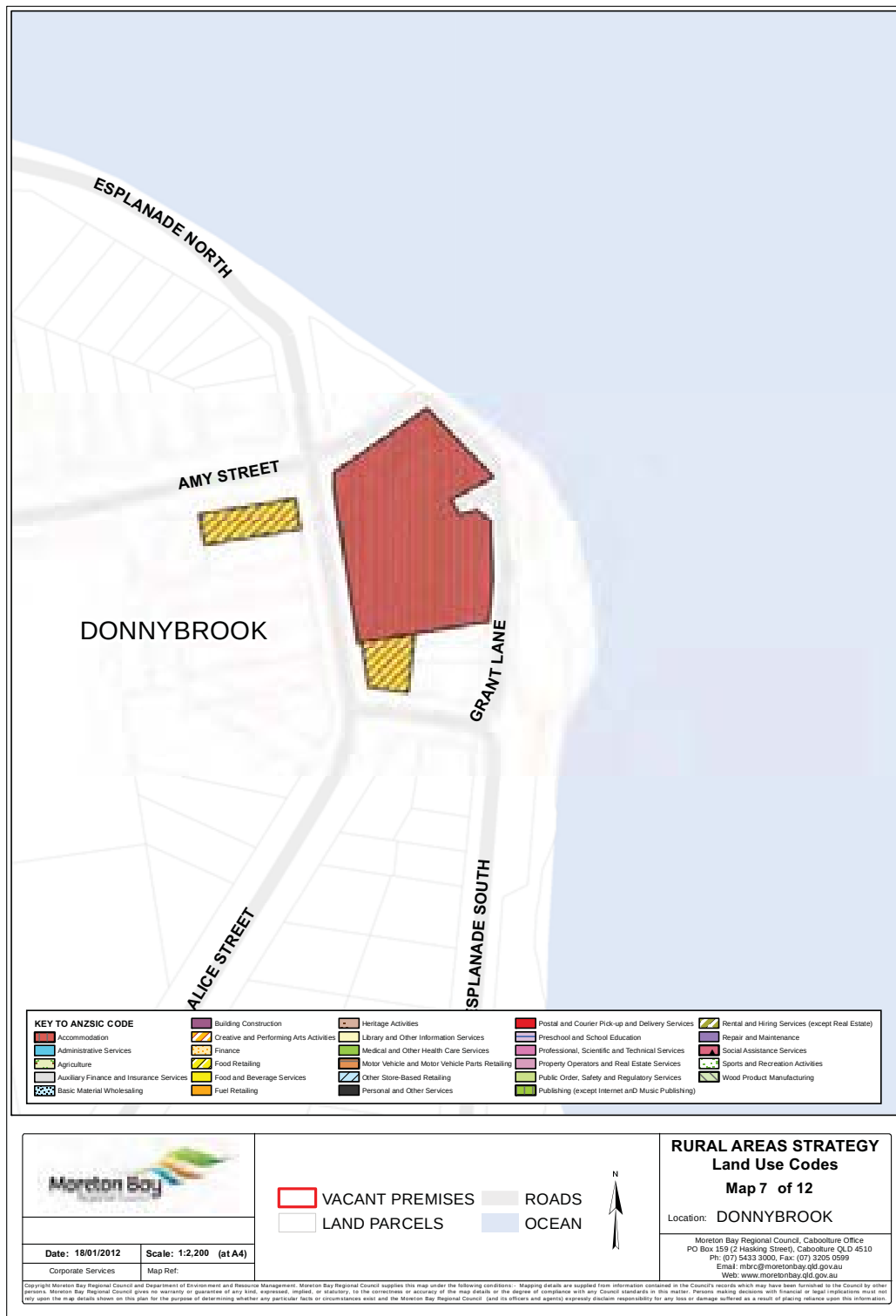
Overall Amenity: The overall amenity of the Donnybrook is underwhelming. The river appears to be very nice and the caravan park appears to be neat however the town does not appear to be busy. Consultation indicated there is a lack of enthusiasm in this town.

Amenity of the shops: Condition of shops is could be improved.

Conflict Areas: There are no apparent conflict areas. All traffic is local and is not busy. The streets are standard size allowing for ease of crossing by pedestrians

Gateways It is not evident where the town boundary is despite the surrounding land uses. The town could benefit from a welcoming park and gardens

Carparking: On street parking appears to be adequate for a town of this size. There did not appear to be any parking issues



Toorbul

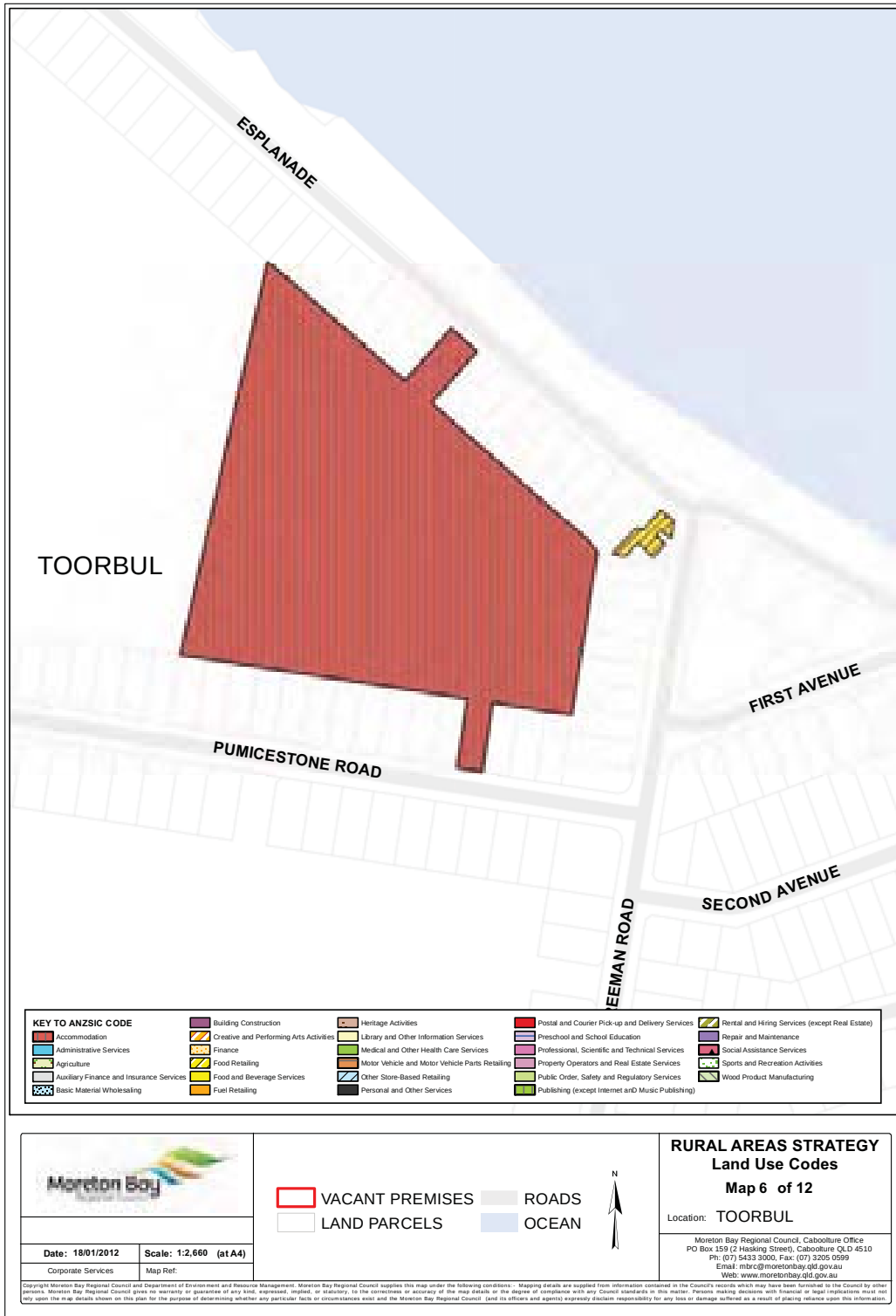
Overall Amenity: The beachfront is pleasant. It is well maintained and neat. There are well connected footpaths and parklands along the waterfront. The entrance into town is not evident, and the limited signage is not very appealing.

Amenity of the shops: Only 1 main commercial premises in town – the general store. The store is old however is fairly neat, although general up-keep could be improved.

Conflict Areas: No notable conflict areas. There are no pedestrian crossings, however the traffic is very limited on the Thursday morning at 10:00am. The town does not seem to be a thoroughfare.

Gateways: A welcome to Toorbul sign exists, signifying the entry into the main town although it is minimal.

Carparking: Parking appears to be sufficient, particularly along the waterfront area. Streets are wide enough for on street parking also.



Ningi

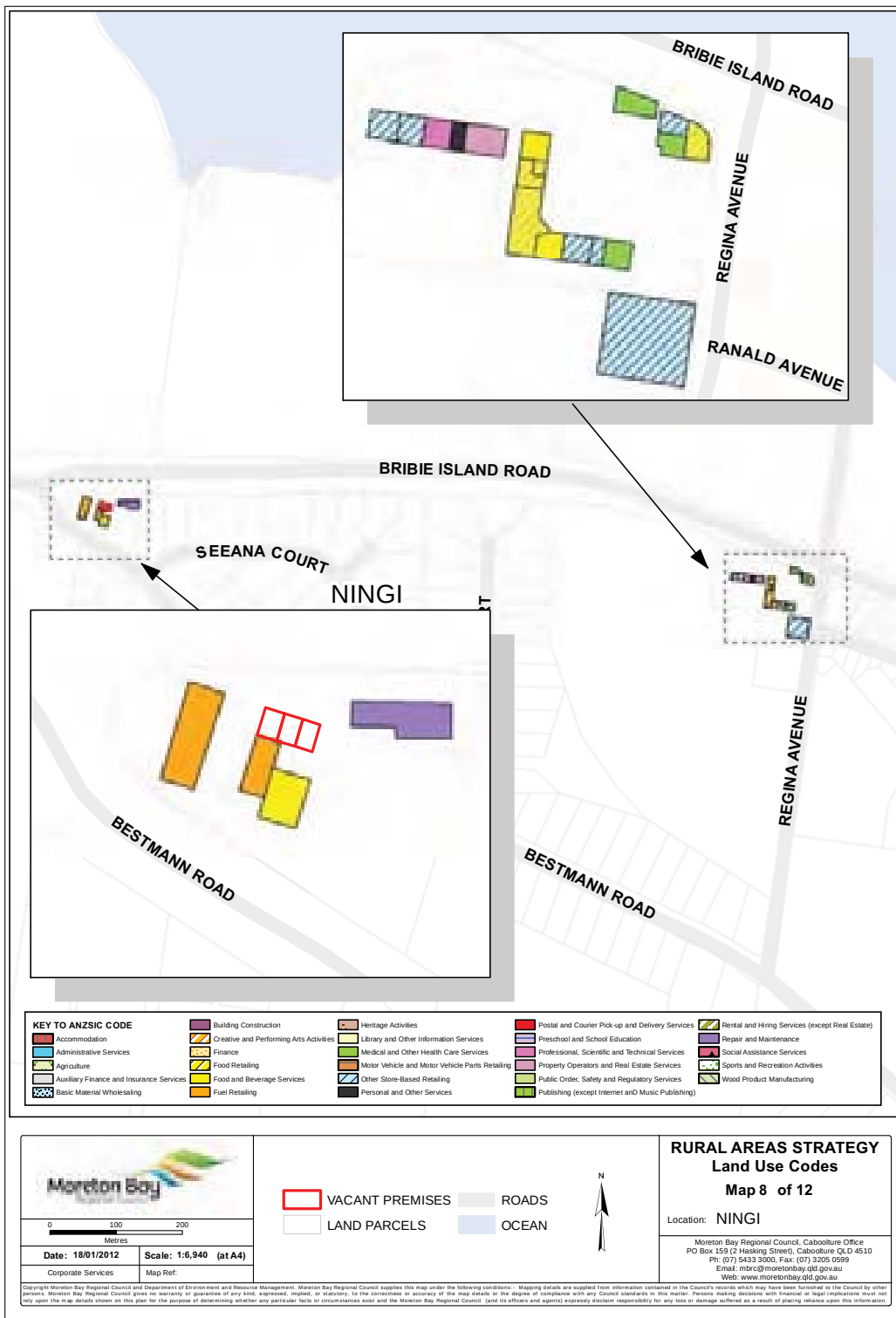
Overall Amenity: Centre is mainly situated on two sites along Bribie Island Road. The main centre is not designed for mingling rather for people to get their goods and leave. Two Cafés have seating for customers to eat, yet bakery does not. Gardens are generally neat. There is not sign of litter.

Amenity of the shops: Amenity is very neat – no graffiti and well maintained.

Conflict Areas: Shop keeper noted that main intersection is very difficult to use as cars are driving at 80km/hr past the centre. The shopkeeper made a note that there is a need for traffic lights due to safety concerns.

Gateways: No clear boundaries to indicate arrival at Ningi. Based on consultation, it seems that the shopping centre is the main hub for the community.

Carparking: Centre is quite busy – customers coming and going. Car park contains approximately 50 cars at 12:48 – approximately 50% capacity.



Sandstone Point

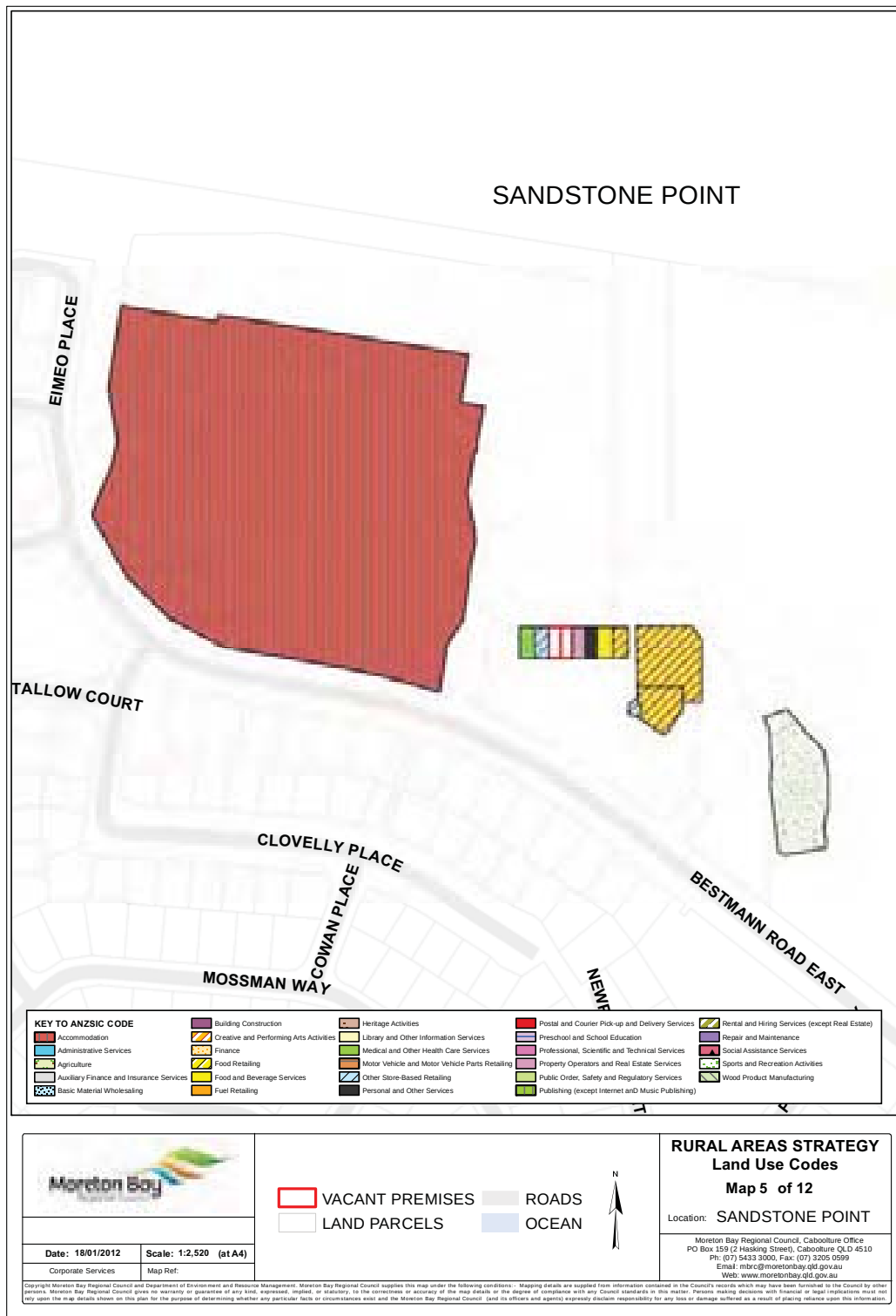
Overall Amenity: Centre is well presented. It has nice gardens and is clean and tidy. There is no sign of vandalism and the main shopping centre is welcoming.

Amenity of the shops: Generally, the up keep of shops is very good. The main centre consists of a fairly new retail complex. The complex has a variety of tenancies.

Conflict Areas: There are no visible signs of conflict areas. Pedestrian crossings are provided within the complex along with refuge islands.

Gateways: Signs indicate entry into both the residential suburb of Sandstone Point and also the shopping village/complex area.

Carparking: Approximately 30 cars were parked within the car park at 13:00. This represents approximately 1/3 of the total spaces. People were shopping at local shops and sitting at the café. The drawcard tenancy is the IGA. Parking appears to be very adequate for the size of the complex.



Beechmere

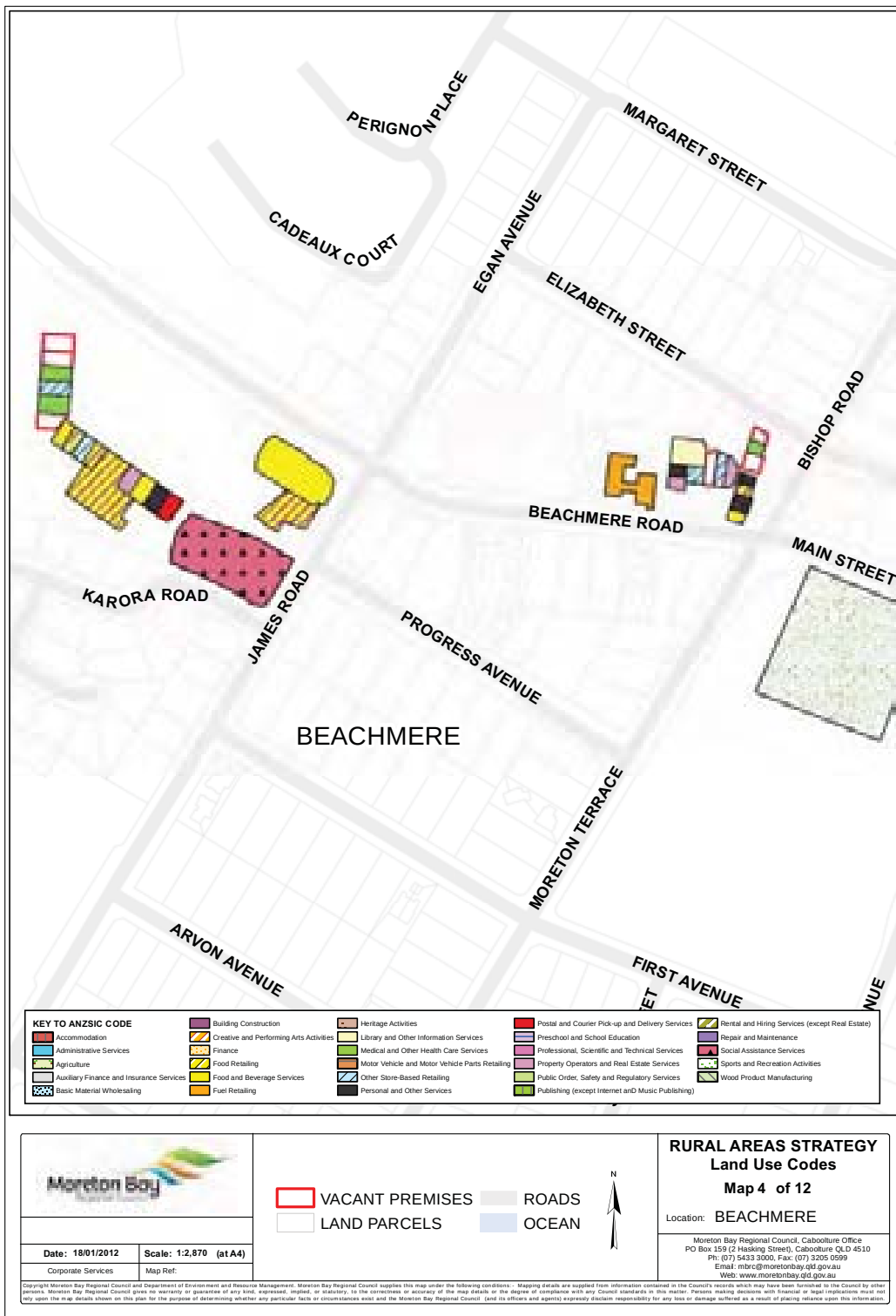
Overall Amenity: The overall amenity is very pleasing. The parks are well maintained within the centres. The Beechmere centre is divided into two retail hubs that are located a short walk from one another. Centre A is very well maintained and was very appealing being a fairly newly developed centre. Centre B was less appealing and was run down in some areas. Entry into Beechmere the suburb is a long drive from other suburbs however it is very welcoming on entry. Clear signage indicates the boundary of the centre.

Amenity of the shops: See above observations.

Conflict Areas: No visible conflict areas. Centre A has pedestrian crossings with wide roads. Centre B is more accessible due to the limited distance that requires walking from car parking..

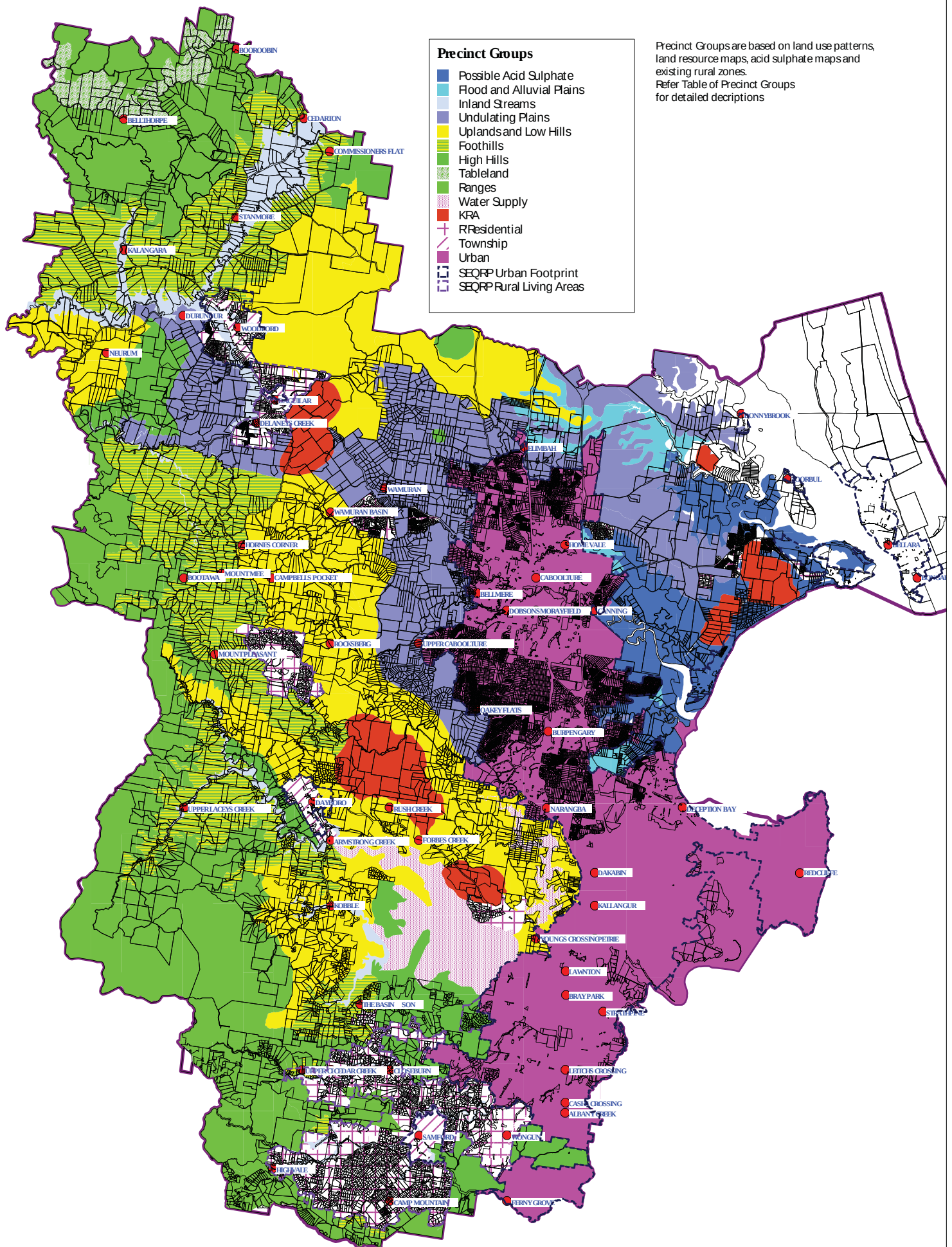
Gateways: It is evident that one has reached the centre as the commercial and also community facilities conjoin in this area.

Carparking: This centre does not provide many areas for dining or sitting. At 14:00 Centre B appeared to be at half capacity with parking. Parking in Centre A is very adequate. Parking in Centre B appears to be less adequate and is constrained by space. A number of cars undertaking multiple attempts to park and then they leave.



APPENDIX F

Place Type Framework



APPENDIX G

Role and Function of Place Types

Appendix G – MBRC Rural Areas Strategy 2012: Role and Function of Each Place Type

Place Type	Role and Function Elements						Level of infrastructure provision
	Business and employment	Residential development	Community services and facilities	Environmental services	Conservation and protection of biodiversity	Open Space and recreation	
Ranges	- Limited: - most land not suited to any form of agriculture and forestry has rapidly declined - difficult to build on for access and bushfire reasons - Mt Glorious has cabins & retreats - limited scope for commercial	- Limited. Difficult to build on for access and bushfire reasons. - Need for building envelope provisions and recognition of constraints to limit development to acceptable areas. - No further subdivision.	- Passive recreation - Conservation	Significant	- Significant. Limited clearing means considerable native species remaining. - High scenic significance (vegetated ridges) - Rehabilitation of former forest areas needed	- Provides both an actual and easily perceived large scale visual aesthetic for the region - Passive recreation where limited impacts and use contributes to conservation outcomes.	Limited. Access constrained.
Tableland	Based on agriculture. - Dominated by GQAL / SCL. The area contains mostly Agricultural Land Class B (limited arable lands) and Agricultural Land Class C (Pastoral quality lands). - Traditionally dairy area, more recently semi commercial beef cattle - Some potential for small scale tourism	- Limited - The 'remoteness' of the area and the larger block sizes is disincentive for rural residential / rural living uses. - Limits on development where possible including building on constrained lots. - No further subdivision but continued dwelling construction on existing lots can be expected. - Approaches to managing impacts required.	Limited	Limited due to high levels of clearing. Land management issues.	Limited	Potential scope for small scale tourism including recreation uses where impacts can be managed.	Limited. Access constrained.
Hills	Currently based on agriculture / GQAL/SCL. The area contains mostly Class C or D lands. Similar land use potential	Already highly fragmented and in demand for rural living.	Limited	Uncleared areas suited to intensification of forest conservation	For those areas which are uncleared, nominate the area as	Local landscape aesthetic values could support passive recreation where limited impacts and use contributes to	Limited

Place Type	Role and Function Elements						
	Business and employment	Residential development	Community services and facilities	Environmental services	Conservation and protection of biodiversity	Open Space and recreation	Level of infrastructure provision
	to the Ranges, however highly fragmented. Better access and greater subdivision means that they will eventually be dominated by rural living type uses as opposed to the lower intensity grazing to which they are best suited.	- The most heavily subdivided locations are in the Wamuran, Neurum, Closeburn and Dayboro areas. - Those areas with current lot sizes of less than 30 ha are likely to see rapid conversion for rural living type uses. - Limits on development where possible including building on constrained lots. - No further subdivision but continued dwelling construction on existing lots can be expected. Approaches to managing impacts required			'predominantly forest conservation area' - High scenic significance (vegetated ridges) - Rehabilitation of former forest areas needed	conservation.	
Foothills	Grazing quality lands only Rural with objective of sustainable grazing	- Heavily subdivided with two-thirds of lots already built on. - More suitable for rural living than agriculture because of existing subdivision pattern. - Limits on development	Limited	Limited. High scenic significance (vegetated ridges)	East west linkages worth enhancing High scenic significance (vegetated ridges). Rehabilitate conservation and landscape values.	Gently sloping and mostly cleared	Reasonable. Better access than Hills or Ranges.

Place Type	Role and Function Elements						
	Business and employment	Residential development	Community services and facilities	Environmental services	Conservation and protection of biodiversity	Open Space and recreation	Level of infrastructure provision
		where possible including building on constrained lots. No further subdivision but continued dwelling construction on existing lots can be expected. Approaches to managing impacts required					
Uplands and low hills	Rural with objective of sustainable grazing and rural living Sustainable forestry potential	- Rural living is dominant land use form due to fragmentation. - Limits on development where possible including building on constrained lots. - No further subdivision but continued dwelling construction on existing lots can be expected. Approaches to managing impacts required	Limited	Limited	- Small valleys with landscape values - East west linkages worth enhancing - High scenic significance (vegetated ridges)	Limited	Reasonable
Undulating plains	Rural based on GOAL / SCL with diverse range of industries, some in decline. Some cropping potential but little comparative advantage	Limited to rural dwellings. - Limits on development where possible including building on constrained lots. - No further	Limited	Limited	Along major access and utility corridors close to the main urban and village areas, rural landscape aesthetic values have been largely replaced by anthropogenic values Little potential for east-west corridor linkages	Limited	Good. Proximity to urban areas.

Place Type	Role and Function Elements						Level of infrastructure provision
	Business and employment	Residential development	Community services and facilities	Environmental services	Conservation and protection of biodiversity	Open Space and recreation	
		subdivision but continued dwelling construction on existing lots can be expected. Approaches to managing impacts required			however some scope at lower slope areas		
Inland streams and valleys	- Streams provide for forage & high value pastures which are key for dairy and cattle - Potential for sustainable cropping	- Historic subdivision pattern - Limited to rural dwellings - Limits on development where possible including building on constrained lots. - No further subdivision but continued dwelling construction on existing lots can be expected. Approaches to managing impacts required	Limited Passive recreation	Some areas prone to flooding	- Major regional landscape aesthetic values - High biodiversity values - water quality enhancement required - Rehabilitation of conservation and landscape values	Limited	Limited
Alluvial plains	Rural with predominant use forestry	In non-forestry areas: - Limit expansion of townships - Connect rural living adjoining urban areas to services where possible	Limited	Significant including flood plain role	Key open space, biodiversity and scenic amenity values related to coastal districts	Passive recreation	Water quality facilitated through urban development Improve linkages to inland areas
Acid sulphate areas	Limited. Constrained.	Limited. No further subdivision.	Limited	Maintain existing approaches to ASS management.	Key open space, biodiversity and scenic amenity values related to coastal districts		

Place Type	Role and Function Elements						
	Business and employment	Residential development	Community services and facilities	Environmental services	Conservation and protection of biodiversity	Open Space and recreation	Level of infrastructure provision
Key resource areas	Significant – extractive resources. Grazing and other agriculture.	Limited. Main issue is separation areas and buffering to existing dwellings. SPP limits uses which bring additional people to area – to live or work.	Limited	Limited	Separation areas contain areas of high biodiversity and conservation values.	Limited	Limited
Rural residential areas	Limited.	Significant. Existing areas provide one aspect of housing diversity.	Limited	Limited	Some areas contain open space, biodiversity and scenic amenity values which should be conserved	Limited	Good. Most in proximity to urban areas
Township areas	Main contributor to local economy and self-containment. Small scale businesses (retail and hospitality) & service industry	Significant. Main supplier of housing - Range of housing options needs to be expanded.	Significant. Main location of local and regional scale community services and facilities.	Good – urban infrastructure to varying degrees. Management of runoff and its quality is important for local water supplies.	Some areas contain open space, biodiversity and scenic amenity values which should be conserved	Good – main location of local and regional scale facilities	Good existing urban services in most townships. Inland townships to be improved over time.
Samford	Most employment: - Professional, scientific and technical services; information media and telecommunications (main areas of employment) - Large proportion professionals and managers	Greater housing diversity and additional housing supply required	As above	As above		- Mount Nebo and Mount Glorious - Brisbane Forest Park and Samford State Forest	
Dayboro	Most employment: - - Electricity, water and waste services and construction industry (main areas of employment) - Large proportion professionals and managers	Greater housing diversity and additional housing supply required	As above	As above			
Woodford	Most employment: - - Agriculture and rural industry are main areas of employment, as well as public administration and safety - Woodford Correctional	Greater housing diversity and additional housing supply required	As above	As above		Woodfordia and festival grounds	

Place Type	Role and Function Elements						
	Business and employment	Residential development	Community services and facilities	Environmental services	Conservation and protection of biodiversity	Open Space and recreation	Level of infrastructure provision
	Centre is another key employer						
Coastal areas	Limited	Maintain current population within urban footprint. Any additional population to be determined by further studies of infrastructure capacity and constraints. Coastal Plan adaptation strategy also likely to constrain further development.	Limited. Outreach services likely to be required.		Coastal Plan considerations	Coastal values	Limited
Water supply catchments	Indirect contribution through support for industries and residential areas in other place types. Some grazing activity.	Limited. No further subdivision	Limited	Maintain quality of water supply – land management practices important.	Maintain quality of water supply – land management practices important.		Limited