

April 2026

Bannockburn, Brisbane

Economic Need Assessment

Prepared for McDonald's Australia Ltd

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Introduction

This report presents an independent assessment of the need and demand for McDonald's at Bannockburn, a southern growth corridor between Brisbane and the Gold Coast. The report also considers the likely economic impacts that would result from the proposed development. The proposal is referred to as Bannockburn McDonald's throughout the remainder of this report.

This report is structure and presented in five sections as follows:

- **Section 1** details the location of the proposed Bannockburn development and discusses the context of the site within the Logan Local Government Area (LGA). The proposed development scheme is also reviewed.
- **Section 2** discusses the key planning strategies of relevance to need in relation to the Logan Planning Scheme.
- **Section 3** details the defined Bannockburn McDonald's catchment area. The current and projected population levels over the period to 2046 are outlined as well as a review of the socio-economic profile and retail expenditure levels.
- **Section 4** summarises the current and future competitive retail environment within which the Bannockburn development would operate.
- **Section 5** outlines an assessment of the sales potential for the proposed Bannockburn development and provides an assessment of the range of economic impacts, both positive and negative that may result from development at the subject site.
- **Section 6** outlines the conclusions and key findings of this report.

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Executive Summary

The key points to note from this report regarding the economic need and impact from the Bannockburn development, include the following:

Site Location and Proposed Development

- i. Bannockburn is an emerging residential suburb within the City of Logan Local Government Area (LGA), approximately 40 km to the south of the Brisbane CBD. The locality forms part of the broader southern growth corridor between Brisbane and the Gold Coast.
- ii. The Bannockburn development site is at the corner of Bannockburn Road and Carl Heck Boulevard opposite the Bannockburn Village shopping centre. Ingress and egress from Carl Heck Boulevard, as well as Bannockburn Road and Beaudesert-Beenleigh Road (via connection to the adjacent United Petroleum Windaroo). The site covers a total area of 5,340 sq.m. A McDonald's fast food outlet with drive-thru of 410 sq.m is proposed.
- iii. The proposed Bannockburn development is designed to provide convenient and accessible service to customers allowing for access from all adjacent roads and a dedicated dual-laned drive-thru, supporting service efficiency and effectively catering to local residents, workers and passing traffic along Beaudesert-Beenleigh Road.

Catchment Area Analysis

- i. The catchment area extends up to 8 km around the subject site and is limited by the Albert River to the east, Latimer Road and Buccan Road to the west and Tallagandra Road and Dairy Creek Road to the north, with the location of existing McDonald's, existing and planned national brand fast food outlets with drive-thru, and residential development also defining the catchment boundary.
- ii. The Bannockburn McDonald's catchment area population is currently estimated at 14,952 persons and is projected to increase to 25,852 by 2046, representing an average annual growth of 2.6%, or 519 persons per year.
- iii. Overall, the catchment area comprises an Australian-born market with a high dependence on cars as a mode of transport and a strong blue collar worker market. The catchment area is dominated by traditionally structured households who would likely have a strong affinity with value-based convenience food catering facilities that have long opening hours, near their homes.
- iv. Takeaway Food spending in the catchment area is higher than the Greater Brisbane average (+14.6%).
- v. The food catering market is projected to increase from \$56.9 million (2025) to \$125.1 million in 2046, reflecting average annual growth rate of 3.8%. All figures presented in this report are in constant 2024/25 dollars and include GST.
- vi. Food catering spending at drive-thru convenience takeaway food stores form an important component of spending directed to retail facilities near workers place of employment/home. It is likely that workers (particularly

industrial workers on shift) who drive would frequent drive-thru facilities on their commute to and from work (including after hours- before and after work) as well as on lunch breaks.

Competitive Environment

- i. The catchment area contains approximately 6 food catering tenants, accounting for around 500 sq.m of GLA. The supply is predominately comprised of dine-in and shopping centre operators, offering restricted choice and operating hours. There are no drive-thru food catering facilities within the catchment area. Food catering tenants are most heavily concentrated in centres along Beaudesert-Beenleigh Road. Overall vacancy levels across the catchment area are limited.
- ii. The existing supply is predominantly oriented towards dine-in formats, local walk-in patronage and offers relatively limited trading hours. There are no facilities offering a convenience-based, drive-thru format that are accessible to passing traffic within the catchment area. On this basis, the proposed development would introduce a food catering offer that is currently under-represented in the catchment area and would not be materially constrained by existing facilities.
- iii. Beyond the catchment area, the nearest McDonald's is at Beenleigh (5.1 km to the north, 24-hour drive-thru). This restaurant primarily serves the surrounding retail/employment precinct and east-west passing traffic along George Street.
- iv. Overall, the Bannockburn development provides substantial points of difference to the vast majority of existing food catering facilities in the catchment area including:
 - Drive-thru facilities.
 - 24 hours operation.
 - Lower price point.

Needs Analysis

- i. The typical McDonald's catchment is around 20,000 – 25,000 persons. In comparison, the catchment area for the Bannockburn development would be in excess of 25,000 persons in 2046 and attract additional business from other customer segments, including passing traffic. There is a clear gap in the market for a drive-thru facility of the type proposed.
- ii. The proposed McDonald's at Bannockburn (410 sq.m) will include a drive-thru restaurant facility and be provided over a single level. The proposed store is projected to achieve sales of around \$6.15 million in 2028/29, representing sales of around \$15,000 per sq.m. This trading level would represent 8.5% of the overall catchment area food catering market in 2028/29 (\$6.15 million divided by the \$72.7 million in 2028/29) conservatively this does not allow sales beyond the catchment area.
- iii. It is estimated that the proposed Bannockburn McDonald's store would have a direct impact on other McDonald's stores within the surrounding area. The greatest impacts are typically absorbed by the closest comparable facilities. A new McDonald's at Bannockburn would provide a more convenient offer for residents of Bannockburn and surrounds who are currently directing their spending to other nearby McDonald's stores beyond the immediate area. It is expected that around one-third of Bannockburn McDonald's sales are expected to be redirected from other nearby McDonald's restaurants (i.e. Beenleigh, Holmview and Yatala).

- iv. The proposed Bannockburn development would also not impact on the viability or continued operation of any existing or proposed facilities within the catchment area or the surrounding region. In terms of competitive impacts, around -\$0.2 million is projected as a result of a redirection of spending from competitive facilities within the Bannockburn catchment area in 2028/29, equivalent to less than one month of growth in the food catering market. This is considered a small impact on other food catering facilities in the catchment area.
- v. Beyond the catchment area, the largest impact in dollar terms would be on Beenleigh at -1.0% or -\$2.8 million. This would largely fall on the McDonald's, as well as other drive-thru fast food restaurants in Beenleigh. The proposed development will not impact the continued operation and viability of retail within Beenleigh, with Beenleigh Marketplace, Beenleigh Mall and Beenleigh Village all anchored by a strong mix of tenants and over 40,000 sq.m retail and non-retail specialty stores.
- vi. Holmview is projected to be impacted by -0.5% or -\$0.9 million. This would largely fall on McDonald's at Holmview Central, as well as other existing and approved drive-thru facilities. The proposed development will not impact on the continued operation and viability of Holmview Central.
- vii. The associated impacts would not affect the viability of these centres or food catering facilities. In percentage terms, no single centre is projected to be impacted by more than -5.0%; well within the normal competitive bands. It is also emphasised that McDonald's would be one of the committed operators at the proposed site, indicating that the brand has assessed the level of impact on its existing and future store network.
- viii. The Bannockburn centre zoned land along Beaudesert-Beenleigh Road will continue to function as a convenience shopping precinct, with a major supermarket and an extensive range of specialty shops (both retail and non-retail).
- ix. All centre zoned sites within the catchment area are currently occupied; there are also limited shop vacancies in the retail strips and shopping centres. Additionally, the sites in retail strips or shopping centres would not be appropriate for a drive-thru fast food outlet operator.
- x. While the subject site is located within the Low Density Residential Zone, it represents a natural extension of the existing Bannockburn Centre zoning. It is also not uncommon for food and drink outlets to be located opposite shopping centre and adjacent to service stations.
- xi. It is the conclusion of this report that a substantial net community benefit would result from the development of McDonald's Bannockburn, offsetting the trading impacts on some existing retailers. There are very substantial positive impacts including the following:
- Significant improvement in the range of food catering facilities (access to drive-thru facilities) that would be available to residents of Bannockburn and surrounds, increasing convenience for the immediate residential catchment within Bannockburn.
 - The proposed development would improve choice of location and allow for price competition across a range of segments.
 - The proposed Bannockburn McDonald's would represent a convenient offer along a major road, opposite a shopping centre, providing the local population with increased choice, price competition, and convenience, with McDonald's offering 24 hour drive-thru trade.

- The socio-economic profile of catchment area residents (i.e., higher than average household income levels, Australian born, young, owner-occupied demographic with a high dependence on cars as a mode of transport and a strong level of blue-collar employees) would have a strong affinity with value-based convenience food catering facilities in close proximity to their homes.
 - The project would also result in the creation of additional employment, both during the construction period, and more importantly, on an ongoing basis once the development is complete and operational. In total, 65 jobs are likely to be created both directly and indirectly as a result of the development. This includes a number of youth employment opportunities, as food catering facilities generally employ a large number of younger staff, with McDonald's providing reputable training and further career opportunities. There are opportunities for individuals that reside in the immediate residential areas surrounding the restaurant to be hired to staff the McDonald's, providing more local jobs for the community.
- iv. It is concluded that the combination of the substantial positive economic impacts serves to more than offset the trading impacts that could be anticipated for a small number of existing and proposed stores, particularly fast food outlet, in the region. Further, the impacts would not threaten the viability of any retail facilities/centres.

1 Location & Composition

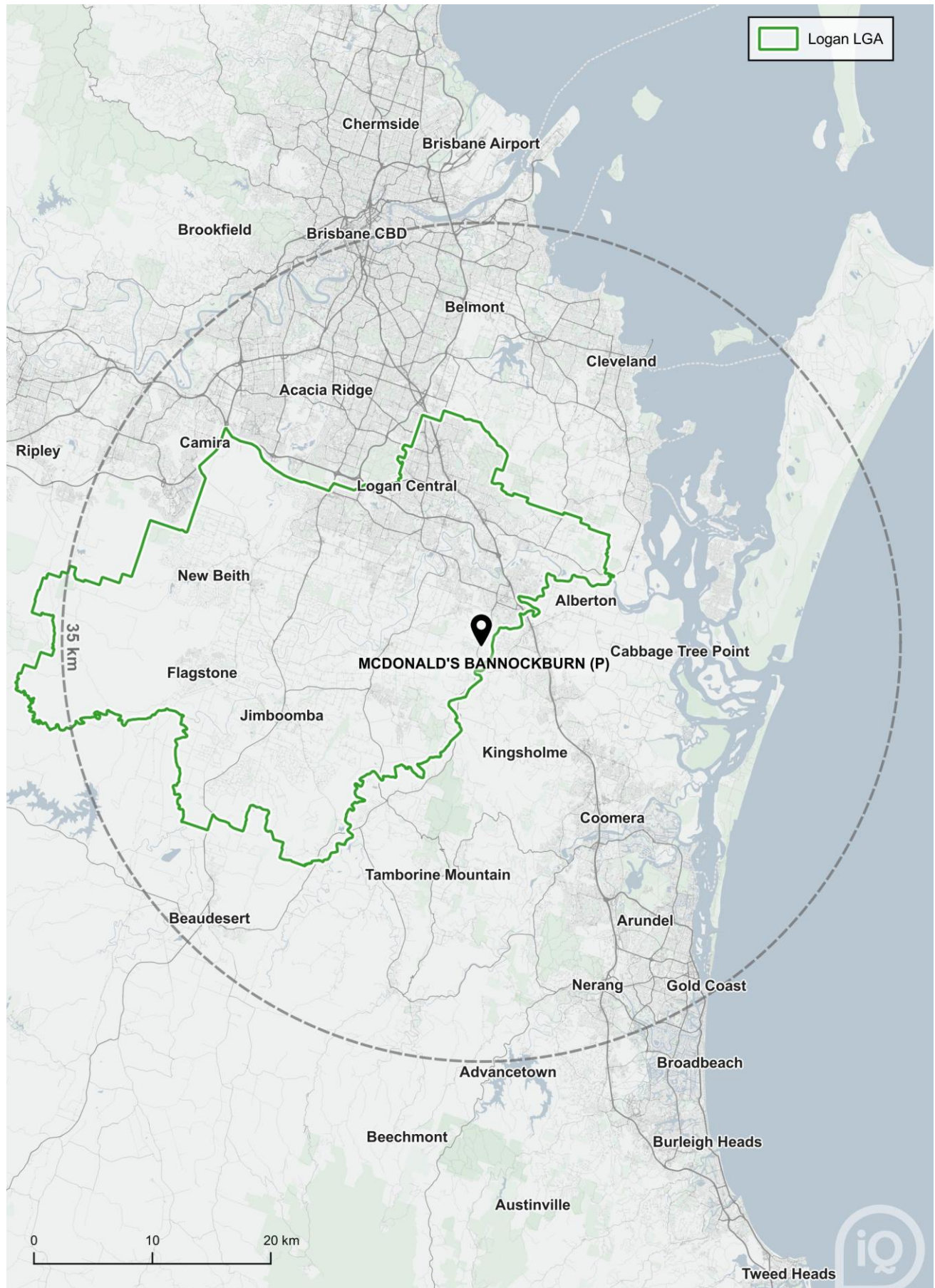
This section of the report reviews the regional and local context of the proposed Bannockburn development and provides an overview of the proposed development scheme.

1.1. Regional and Local Context

- i. Bannockburn is an emerging residential suburb within the City of Logan Local Government Area (LGA), approximately 40 km to the south of the Brisbane CBD (refer Map 1.1). The locality forms part of the broader southern growth corridor between Brisbane and the Gold Coast.
- ii. The subject site is situated in proximity to Beaudesert–Beenleigh Road (refer Map 1.2), which functions as the primary north–south arterial route through the catchment. This corridor provides connectivity to Beenleigh to the north and to the Pacific Motorway (M1), facilitating access to both Brisbane and the Gold Coast. The road accommodates commuter, local and service-based traffic movements.
- iii. The nearest available traffic count along Beaudesert–Beenleigh Road is 1.0 km to the south, at Belivah Creek (refer Map 1.3). Traffic in both directions in 2024 was recorded at 6,764 vehicles per day (~2.5 million per year).
- iv. The subject site is opposite the Bannockburn Village neighbourhood centre, anchored by a Woolworths supermarket. This centre represents the primary retail and convenience offering within the immediate catchment and services surrounding residential communities.
- v. A service station and convenience retail offering are located nearby along Beaudesert–Beenleigh Road, reinforcing the role of the corridor as a convenience-based retail node catering to passing traffic and local residents.
- vi. The surrounding area is characterised by a mix of established and emerging residential communities, including masterplanned estates such as Brookhaven, which are contributing to ongoing population growth and increased demand for retail and food service offerings.
- vii. The area is characterised by a high level of car dependency, with limited public transport infrastructure relative to inner metropolitan areas. As a result, accessibility to retail and service uses within the catchment is predominantly vehicle-based.
- viii. Map 1.1 illustrates the local context of the subject site, with key features including:
 - A United Petroleum service station that includes a Quick Stop convenience store and Pie Face adjoins the subject site to the west.
 - The Woolworths-anchored shopping centre Bannockburn Village, which forms the primary retail node within the immediate area.
 - Exposure to passing traffic along Beaudesert–Beenleigh Road.

- Established residential homes surround the site.
 - A District Sports Park situated on the western side of and Beaudesert-Beenleigh Road as part of Davidsons at Belivah Estate.
 - Proximity to a growing residential catchment across Bahrs Scrub, Windaroo and surrounding estates.
- ix. Overall, the subject site occupies a strategically positioned location within a high-growth metropolitan corridor. The combination of increasing population, strong passing traffic, and proximity to convenience-based retail supports the suitability of the site for a drive-thru quick service restaurant, such as McDonald's.

MAP 1.1. BANNOCKBURN REGIONAL CONTEXT



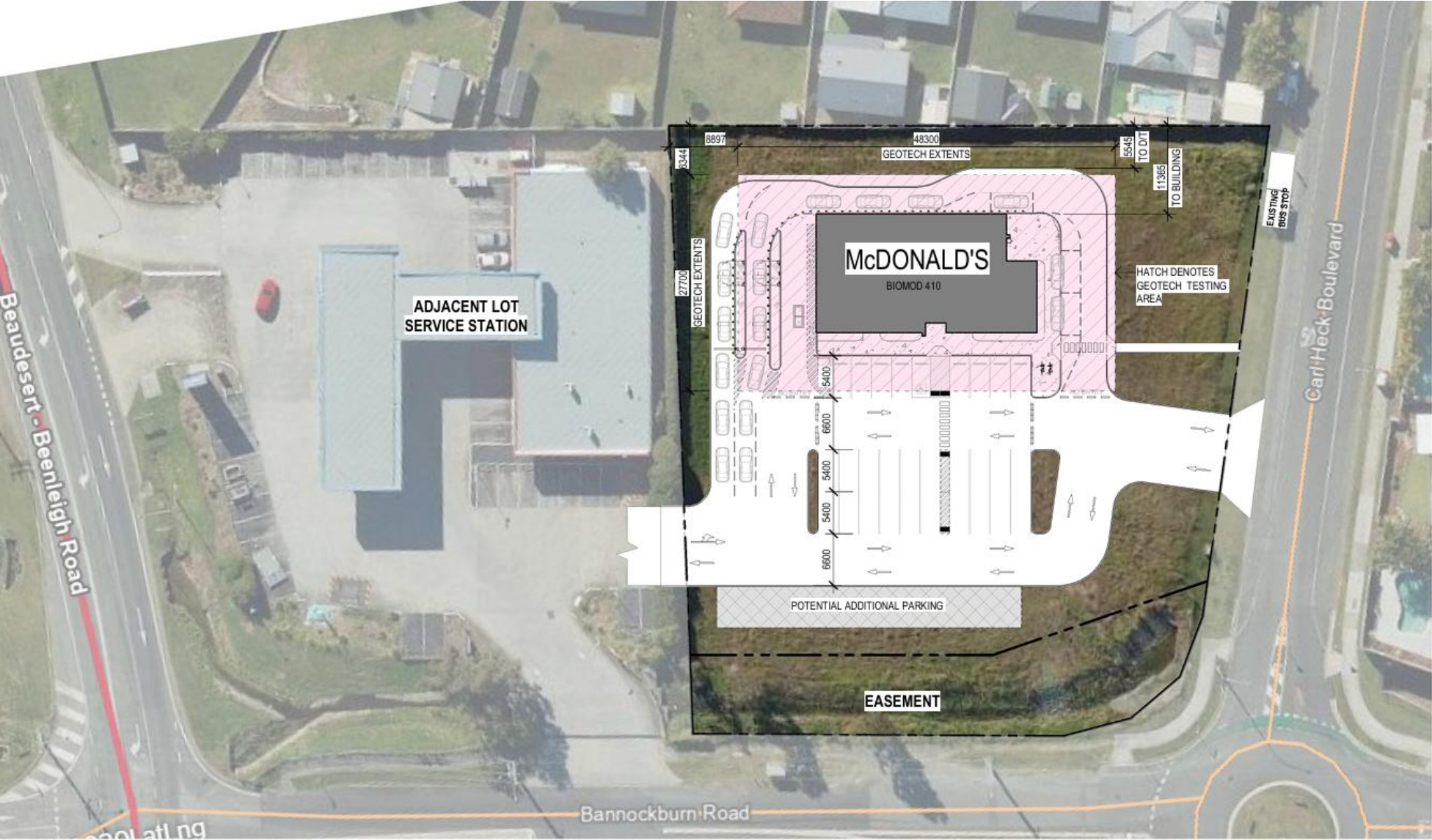
MAP 1.2. BANNOCKBURN LOCAL CONTEXT



1.2. Proposed Development

- i. McDonald's Australia Ltd is proposing a fast food outlet with drive-thru on the corner of Bannockburn Road and Carl Heck Boulevard to serve the needs of surrounding residents, workers and passing traffic.
- ii. Figure 1.1 illustrates the layout of the proposed Bannockburn development. Key points to note include:
 - A total site area of ~5,340 sq.m.
 - A McDonald's fast food outlet with drive-thru of 410 sq.m.
 - Car parking for 27 vehicles.
 - A drive thru queue of 18 vehicles.
 - Ingress and egress from Carl Heck Boulevard, as well as Bannockburn Road and Beaudesert-Beenleigh Road (via connection to the adjacent United Petroleum Windaroo).
- iii. The site enjoys direct frontage onto Bannockburn Road and Carl Heck Boulevard which intersect at a round-a-bout, with convenient access via Beaudesert-Beenleigh Road also due to the round-a-bout.
- iv. The proposed Bannockburn development is designed to provide convenient and accessible service to customers, allowing for access from all adjacent roads and a dedicated dual-laned drive-thru, supporting service efficiency and effectively catering to local residents, workers and passing traffic along Beaudesert-Beenleigh Road.

FIGURE 1.1. PROPOSED BANNOCKBURN DEVELOPMENT



2 Planning Framework

This section outlines the key principles and policies relating to the Logan Planning Scheme 2015. It is not intended to be a detailed review of planning considerations, but rather the strategic context relevant to the assessment of community, economic and planning need for the proposed development.

2.1. Logan Planning Scheme 2015

- i. The Logan Planning Scheme 2015 is the current statutory planning instrument for the City of Logan Local Government Area. The Scheme provides a framework for managing growth, guiding land use, and regulating development in Logan to ensure sustainability, amenity, and economic vitality.
- ii. The Scheme was most recently updated in 2025 (Version 9.2) and took effect as at 1 July 2025. The Scheme categorises land into zones, each with specific overall outcomes, and sets out tables of assessment and development codes that apply for different types of development.
- iii. McDonald's Australia Limited is proposing a new store at 377 Beaudesert – Beenleigh Road, Windaroo with a drive-through facility on a 10,000 sq.m lot in Bannockburn. The subject site is zoned Low Density Residential Zone under the Logan Planning Scheme 2015 (Map 2.1, Logan ePlan). The existing service station (including Pie Face) occupies approximately 4,300 sq.m of the lot and is a lawful non-residential use established within the residential zone.

Low Density Residential Zone

6.2.5 Low Density Residential Zone Code

6.2.5.1 Application

1. This code applies to:
 - a. Accepted development (subject to requirements) and code assessable material change of use for which the Low Density Residential Zone Code is identified in the assessment benchmarks for assessable development and requirements for accepted development column in Table 5.5.5.1 - Low Density Residential Zone; and
 - b. Material change of use made impact assessable in Table 5.5.5.1 — Low Density Residential Zone.

6.2.5.2 Purpose

1. The purpose of the Low Density Residential Zone is to provide for:
 - a. A variety of low density dwelling types, including dwelling houses; and
 - b. Community uses, and small-scale services, facilities and infrastructure, to support local residents.

2. The local government purpose of the Low Density Residential Zone Code is to:
 - a. Provide for predominantly dwelling houses;
 - b. Provide small-scale non-residential development that caters for the daily needs of local residents;
 - c. Provide levels of comfort, quiet, privacy and safety reasonably expected in a predominantly residential environment.
3. The purpose of the code will be achieved through the following overall outcomes:
 - a. the design of the built form:
 - i. Is responsive to site characteristics, including the shape, frontage, size, orientation and slope;
 - ii. Ensures that its size and bulk is consistent with the character of the residential environment;
 - iii. Incorporates appropriate boundary clearances and building separation to protect and provide privacy for residents;
 - iv. Ensures it is easily and safely accessed;
 - v. Provides a streetscape that is attractive, pedestrian friendly and supports the precinct character;
 - b. Development protects amenity consistent with its location in the Low Density Residential Zone and precinct and the surrounding area;

Table 5.5.5.1 – Low Density Residential Zone (Categories of Development)

- i. The Tables of Assessment (Part 5) of the Logan Planning Scheme 2015 set out whether particular uses are accepted, code assessable or impact assessable in each zone. For the Low Density Residential Zone:
 - A Food and Drink Outlet (which includes restaurants, cafes and similar uses) is typically a code assessable use when small-scale and without a drive-through under the Low Density Residential Zone (subject to specific criteria in Table 5.5.5.1).
 - A Food and Drink Outlet with a drive-through facility is not listed as an accepted or straightforward code assessable use in the standard table for the Low Density Residential Zone and is therefore impact assessable development, requiring assessment against all relevant parts of the Scheme, including applicable codes such as the Low Density Residential Zone Code (Part 6.2.5).

Low Density Residential Zone – Relevant Performance Outcomes

- ii. The overall outcomes (Section 6.2.5.2, above) establish that non-residential uses:
 - Must be of a small-scale nature to cater for the daily needs of local residents without undermining the residential character; and
 - Must be designed and located so that amenity impacts (noise, traffic, servicing) are mitigated and the residential environment is protected.

Other Relevant Scheme Provisions

- Part 9 – Servicing, Access and Parking Code: Requires development to provide safe and efficient vehicle access, manoeuvring and on-site parking that does not adversely affect the amenity and safety of surrounding residential streets.
 - Part 9 – Landscaping and Streetscape Code: Requires landscaping treatments and buffers to screen commercial uses and protect streetscape and residential amenity.
 - Infrastructure, Environmental and Amenity Codes: Additional performance outcomes to be addressed for aspects such as waste servicing, stormwater, noise, lighting and odour management.
- iii. These codes form part of the assessment benchmarks to be satisfied and are identified through the Logan Planning Scheme 2015 ePlan or PD Hub when the category of development is determined.

Interpretation for the Proposed Development

- iv. The subject site's location within the Low Density Residential Zone means that the primary intent of the zone is residential, with the allowance for small-scale non-residential uses that directly support local daily needs.
- v. The existing service station demonstrates that commercial uses have historically been established on the site in a manner that has not precluded residential amenity, supporting the notion that the subject site can accommodate non-residential uses where impacts are appropriately managed.
- vi. The proposed McDonald's drive thru restaurant is impact assessable, and requires assessment against the Low Density Residential Zone Code (Part 6.2.5) and relevant development codes in Part 9. The overall outcomes of the zone explicitly require protection of residential amenity and character, and any non-residential use must demonstrate performance outcomes that respect these objectives.
- vii. In this context, the proposed development's design (including siting, landscaping, access and operational controls) must demonstrate it will achieve the overall outcomes of the Scheme — that is, providing supportive commercial services in a manner that is compatible with the residential environment and meets the applicable performance outcomes of the zone and development codes.
- viii. Overall, the site's location, corner orientation, and integration with the existing commercial uses which have historically been established in a manner that does not preclude residential amenity make it suitable for retail and service uses while maintaining the integrity of the Low Density Residential zoning in the broader neighbourhood.

MAP 2.1. LAND ZONING



Land Zoning

 Centre	 Environmental Management and Conservation	 Recreation and Open Space
 Community Facilities	 Low Density Residential	 Rural
 Emerging Community	 Low-Medium Density Residential	 Rural Residential

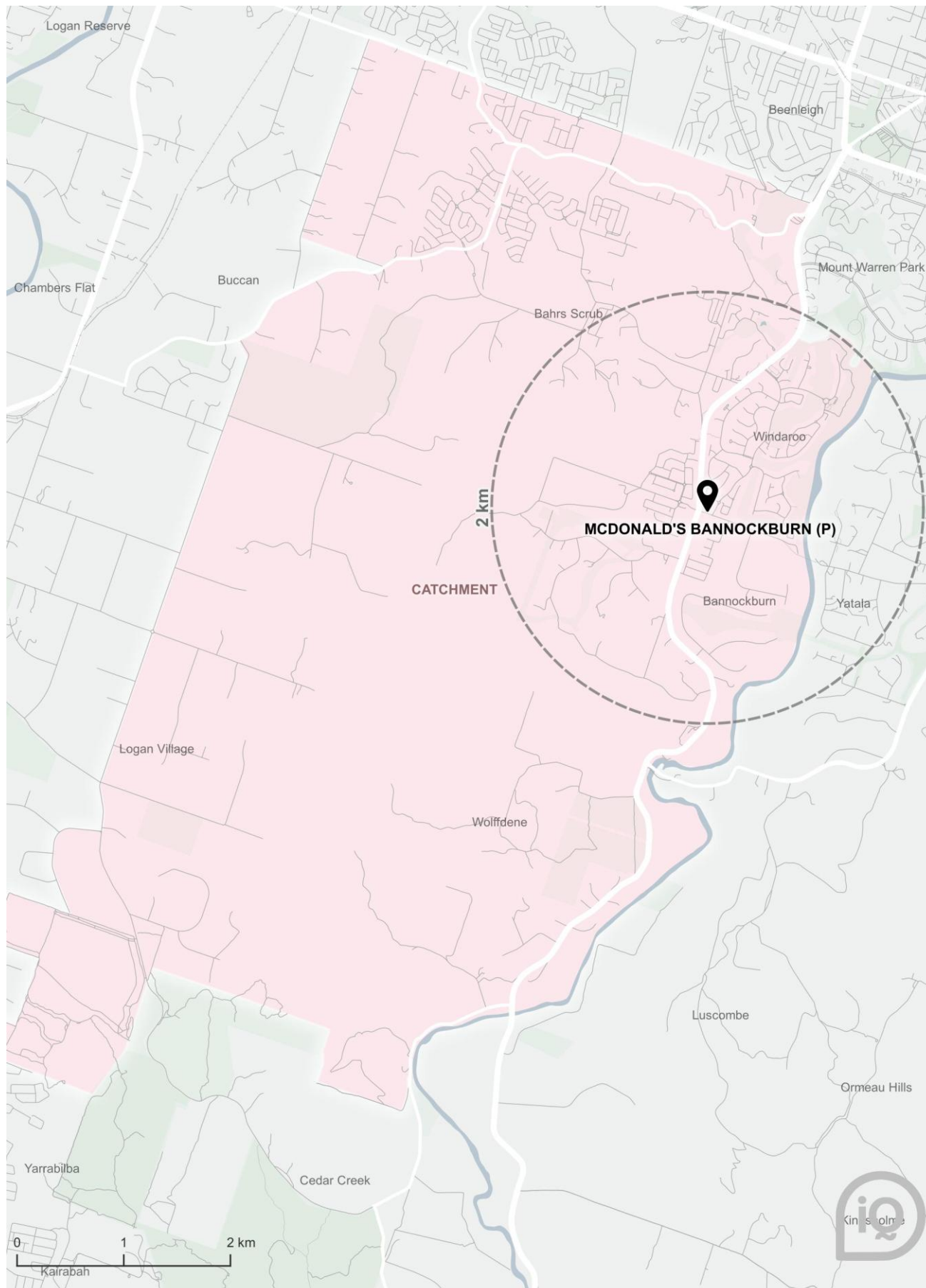
3 Catchment Area Analysis

This section of the report provides a review of the defined Bannockburn McDonald's catchment area. The current and projected population levels over the period to 2046 are outlined as well as a review of the socio-economic profile and retail expenditure levels.

3.1. Catchment Area Definition

- i. The catchment area served by the proposed Bannockburn McDonald's development has been defined taking into consideration the following:
 - The scale and composition of the planned development (McDonald's with drive-thru).
 - The location of competing facilities throughout the surrounding region, including other McDonald's restaurants.
 - Regional and local accessibility of the site.
 - The pattern of urban development.
 - Significant physical barriers.
- ii. Map 3.1 illustrates the defined catchment area for the proposed Bannockburn McDonald's with drive-thru, encompassing suburbs such as Bahrs Scrub, Windaroo, Bannockburn and Wolfdene.
- iii. The catchment area extends up to 8 km around the subject site and is limited by the Albert River to the east, Latimer Road and Buccan Road to the west and Tallagandra Road and Dairy Creek Road to the north, with the location of existing McDonald's as well as existing and planned national brand fast food outlets with drive-thru and planned residential development also defining the catchment boundary.

MAP 3.1. BANNOCKBURN CATCHMENT AREA & SUBURBS



3.2. Catchment Area Population

- i. Table 3.1 details the current and projected Bannockburn catchment area population levels. This information is sourced from the following:
 - The 2011, 2016, and 2021 Census of Population and Housing undertaken by the Australian Bureau of Statistics (ABS).
 - New dwelling approvals statistics from the ABS from 2011/12 to 2024/25 (refer Chart 3.1), which indicate an average of 160 new dwellings were approved for the catchment area annually over this timeframe. Since 2020/21 new dwelling approvals have averaged 311 per year.
 - The latest population projections prepared at a Statistical Area 2 (SA2) level by Queensland Government Statistician's Office (medium series 2023).
 - The National Forecasting Program by .id Consulting (2025).
 - Investigations by this office into new residential developments in the region.
- ii. The Bannockburn McDonald's catchment area population is currently estimated at 14,952 persons and is projected to increase to 25,852 by 2046, representing an average annual growth of 2.6%, or 519 persons per year.
- iii. The 2023 QGSO population projections for the Wolffdene - Bahrs Scrub SA2 forecast population would grow by 15,361 persons from 2021 to 2046. The defined trade area includes the entire Wolffdene - Bahrs Scrub SA2 and based on a review of the residential development within the area Colliers have conservatively projected population will grow by only 14,500 persons from 2021 to 2046 (i.e. lower than official population projections).
- iv. Map 2.4 illustrates the broadhectare land available within the surrounding precinct. The Bahrs Scrub region is the largest designated broadhectare area within the catchment area. Beyond the catchment area, there is a large amount of broadhectare land at Yarrabilba and Logan Reserve.
- v. Over the forecast period, population growth within the catchment area will be driven by the development of several residential estates. Key points to note include:
 - **Davidson at Belivah** is located directly opposite the subject site and will include over 500 lots, with first homes completed in 2018. Approximately 255 homes have been built to date with completion assumed by 2031.
 - The **Brookhaven Estate** masterplan includes the proposal of the retail village namely Bahrs Scrub Local Centre. The estate has a total yield of ~1,750 homes, with some 1,420 homes currently developed within the estate. The remainder of the estate is assumed for completion by 2031.
 - **Windaroo Rise** is set for development in the short term and is proposed to include a total of 78 new dwellings. Construction is yet to commence.
 - **Holmview** has been a strong contributor to residential growth within the catchment, with developments such as Pinnacle Estate (40 homes) and Holmview Estate (64 homes) recently reaching full build out.

- **Somerfield Estate** within Holmview is currently under construction, with some 160 of 316 dwellings currently delivered. The estate is forecast for completion by 2031.
 - **Panorama Estate** in Bahrs Scrub is nearing completion of a total of 75 residential lots.
- vi. It is important to note that the population projections in this report are based on current market conditions and the latest available information collected or provided to this office. If market conditions change, this would impact population, and sales projections outlined in this assessment.

TABLE 3.1. CATCHMENT AREA POPULATION, 2011 – 2046

Population	Actual			Forecast						Change 2025-46
	2011	2016	2021	2025	2026	2031	2036	2041	2046	
Catchment Area	6,900	7,864	11,352	14,952	15,852	19,852	23,852	25,102	25,852	10,900

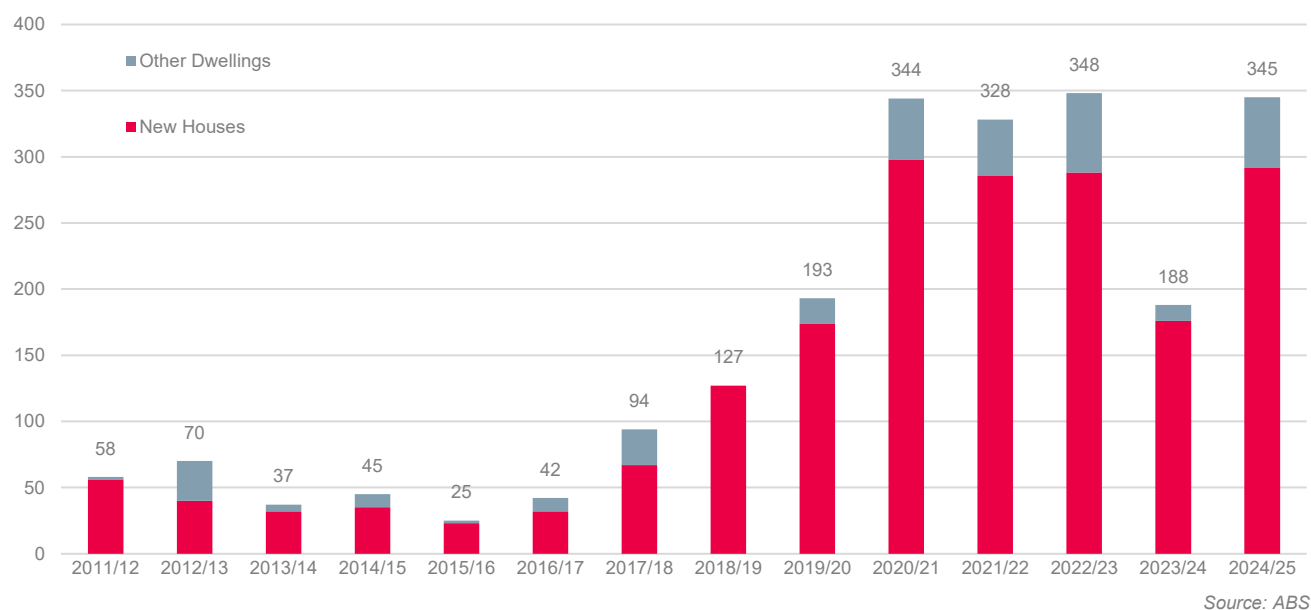
Average Annual Change (No.)	Actual		Forecast						Change 2025-46	
	2011-16	2016-21	2021-25	2025-26	2026-31	2031-36	2036-41	2041-46		
Catchment Area		193	698	900	900	800	800	250	150	519

Average Annual Change (%)	Actual		Forecast						Change 2025-46	
	2011-16	2016-21	2021-25	2025-26	2026-31	2031-36	2036-41	2041-46		
Catchment Area		2.6%	7.6%	7.1%	6.0%	4.6%	3.7%	1.0%	0.6%	2.6%
Greater Brisbane		1.9%	1.8%	2.9%	2.3%	1.7%	1.3%	1.1%	1.0%	1.4%
Australian Average		1.6%	1.2%	2.1%	1.8%	1.6%	1.3%	1.2%	1.1%	1.4%

All figures as at June and based on 2021 SA1 boundary definition.

Sources : ABS, QGSO, National Forecasting Program by .id – informed decisions

CHART 3.1. CATCHMENT AREA NEW DWELLING APPROVALS, 2011/12 – 2024/25



3.3. Catchment Area Socio-economic Profile

- i. Table 3.2 summarises the socio-economic characteristics of the Bannockburn McDonald's development catchment area population, compared with the Greater Brisbane and Australian benchmarks. This is based on the 2021 Census, with the results of the 2026 Census (11 August 2026) to be released in 2027.
- ii. Key points to note include:
 - The **average age** of the catchment area (34.8 years) is younger than the Greater Brisbane benchmark (37.8 years).
 - The population is primarily **Australian born** (77.9%), higher than the Greater Brisbane benchmark (72.8%).
 - Couples with dependent children (47.1%) are the dominant **household type** within the catchment area. This is higher than the Greater Brisbane benchmark (45.4%).
 - Residents earn **higher than average (+3.5%) household income levels** (\$117,193 per household) as compared with Greater Brisbane average (\$113,246 per household), reflecting the larger than average household size (2.9 persons per household) and higher proportion of couples. Residents earn average per capita income levels (\$52,815 per capita) that are slightly lower (-5.7%) than the benchmark level (\$56,028 per capita).
 - **Labour Force:** The catchment area has a high labour force participation rate (+72.3%) compared to the benchmark (66.1%). The proportion of blue-collar workers (36.2%) proportion is also significantly higher than the benchmark level (28.0%).
 - Households are typically **owner-occupied** within the catchment area (69.9%) broadly aligning with the Greater Brisbane benchmark (63.3%).
 - **Car ownership** within the catchment area is prevalent – 98.6% of households own a car (higher than the benchmark level of 93.7%). 76.0% of households within the catchment area own two or more cars, which is significantly more when compared to the Greater Brisbane average of 57.3% of households, highlighting a strong dependence on cars as a mode of transportation for residents of the catchment area.
- iii. Overall, the catchment area comprises an Australian-born market with a high dependence on cars as a mode of transport and a strong blue collar worker market. The catchment area is dominated by traditionally structured households who would likely have a strong affinity with value-based, drive thru convenience food catering facilities that have long opening hours, near their homes.

TABLE 3.2. CATCHMENT AREA SOCIO-ECONOMIC PROFILE, 2021 CENSUS

Characteristic	Catchment Area	Greater Brisbane Average
People		
Age Distribution (% of Pop'n)		
Aged 0-19	28.3%	25.2%
Aged 20-39	31.8%	29.4%
Aged 40-59	24.4%	25.6%
Aged 60+	15.5%	19.8%
Average Age	34.8	37.8
Birthplace (% of Pop'n)		
Australian	77.9%	72.8%
Overseas	22.1%	27.2%
Family		
Average Household Size	2.9	2.6
Family Type (% of Pop'n)		
Couple with dep't children	47.1%	45.4%
Couple with non-dep't child.	8.7%	7.0%
Couple without children	23.4%	23.2%
Single with dep't child.	11.5%	9.7%
Single with non-dep't child.	3.5%	3.8%
Other family	0.8%	1.2%
Lone person	5.0%	9.8%
Employment		
Income Levels		
Average Per Capita Income	\$52,815	\$56,028
Average Household Income	\$117,193	\$113,246
Labour Force (% of Pop'n)		
Labour Force Participation	72.3%	66.1%
% Unemployed	4.5%	5.9%
% White Collar Occupations	63.8%	72.0%
% Blue Collar Occupations	36.2%	28.0%
% Full Time	69.1%	66.0%
% Part Time	30.9%	34.0%
Housing		
Tenure Type (% of Dwellings)		
Owned	69.9%	63.3%
Rented	29.7%	35.3%
Other Tenure Type	0.4%	1.3%
Car Ownership (% of H'holds)		
% 0 Cars	1.4%	6.3%
% 1 Car	22.6%	36.3%
% 2 Cars	45.6%	37.9%
% 3 Cars	19.2%	12.5%
% 4 Cars	11.2%	7.0%

Sources: ABS Census of Population and Housing 2021

3.4. Catchment Area Retail Expenditure

- i. The estimated retail expenditure capacity of the catchment area population is based on actual electronic transactions data sourced from CommBank iQ Retail Spend Insights.
- ii. CommBank iQ Retail Spend Insights is a new dataset that was first released in April 2023 (Calendar Year 2022) and is to be released for each Financial Year and Calendar Year going forward (i.e. released every six months). The dataset was initially adopted by the three leading economic property consultants in Australia, including Colliers Property Economics & Analytics. The dataset has now been more widely adopted and has become industry standard. Retail Spend Insights is a modelled view of retail spend per capita across Australia. It is provided at the SA1 level allowing for the creation of bespoke catchments to facilitate a view on resident spend by category for the area.
- iii. The dataset is based on de-identified, privacy treated retail banking transactions, normalised to be representative of the Australian population. Transactions may include purchases and refunds from credit card, debit card, EFTPOS cards, BPay and direct debit. CommBank iQ Retail Spend Insights excludes cash and buy now pay later services (CBNPL). The data provides the average annual spend (for FY2025) across 82 categories for people aged 18 years and older. The data is also split out by instore and online transactions. Colliers Property Economics & Analytics has adjusted the raw data for the population aged under 15 years as well as allowing for the inclusion of CBNPL.
- iv. Charts 3.2 and 3.3 illustrate the retail spending levels per person across the catchment area, as compared with the Greater Brisbane averages in 2024/25. Retail spending in the catchment area is lower than the Greater Brisbane averages, with the relevant expenditure category of food catering is slightly lower than the benchmark level (-6.1%).
- v. Chart 3.4 show the spending levels for all sub-categories of food catering. Of these sub-categories, Takeaway Food (+14.6%) and Pubs, Taverns and Bars (+9.6%) are higher than the benchmark levels, while Breweries, Wineries and Wine Subscriptions (-43.1%), Cafes & Restaurants (-26.1%) and Food Delivery Services (-8.8%) are lower than the benchmark levels. Variances in sub-category spending may be supply induced.
- vi. Table 3.3 details the catchment area retail expenditure generated by key commodity groups, along with the total retail expenditure levels generated by the catchment area population. The total retail expenditure level is currently estimated at \$264.7 million and is projected to increase at an average rate of 3.6% to \$561.3 million by 2046. All figures presented in this report are in constant dollars and include GST.
- vii. The projected growth rate in retail spending for the catchment area considers the following:
 - **Inflation or RPI** is held at 0.0% across the forecast period to 2046.
 - **Real growth** in retail spending per capita of 0.5% annually for food retail and 1.0% for food catering and other non-food retail over the period to 2046.
 - **Population growth** across the catchment area is projected at 2.6% per annum.
- viii. The food catering market is projected to increase from \$56.9 million (2025) to \$125.1 million in 2046, reflecting average annual growth rate of 3.8%.

- ix. Food catering spending at drive-thru convenience takeaway food stores form an important component of spending directed to retail facilities near workers place of employment/home. It is likely that workers (particularly industrial workers on shift) who drive would frequent drive-thru facilities on their commute to and from work (including after hours- before and after work) as well as on lunch breaks.

CHART 3.2. CATCHMENT AREA RETAIL EXPENDITURE PER CAPITA, 2024/25

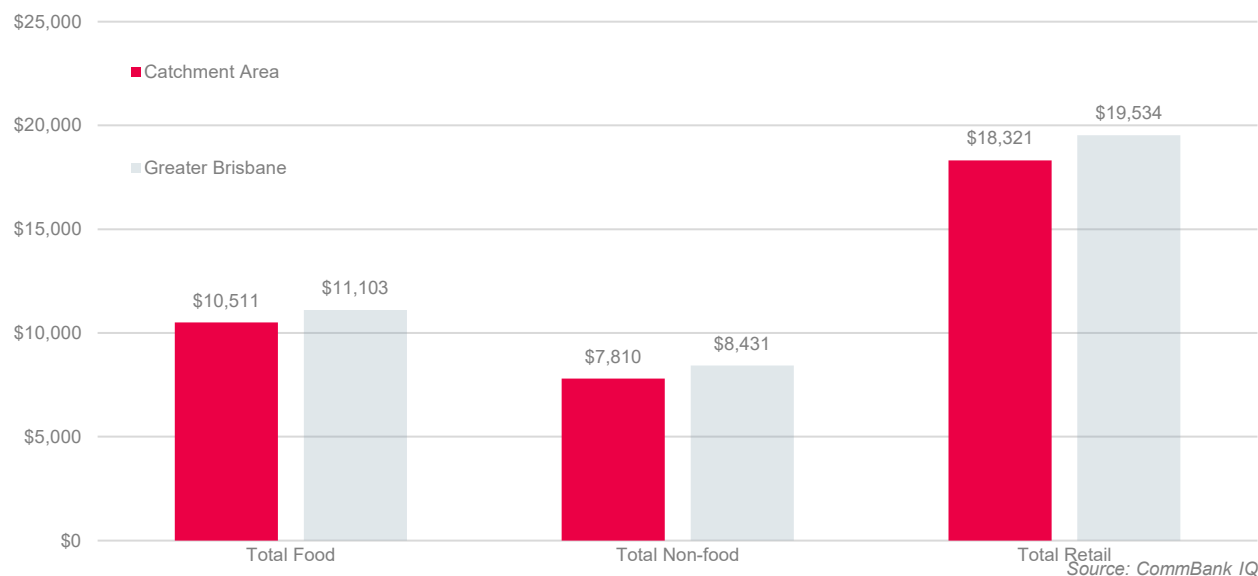


CHART 3.3. CATCHMENT AREA RETAIL EXPENDITURE PER CAPITA, 2024/25

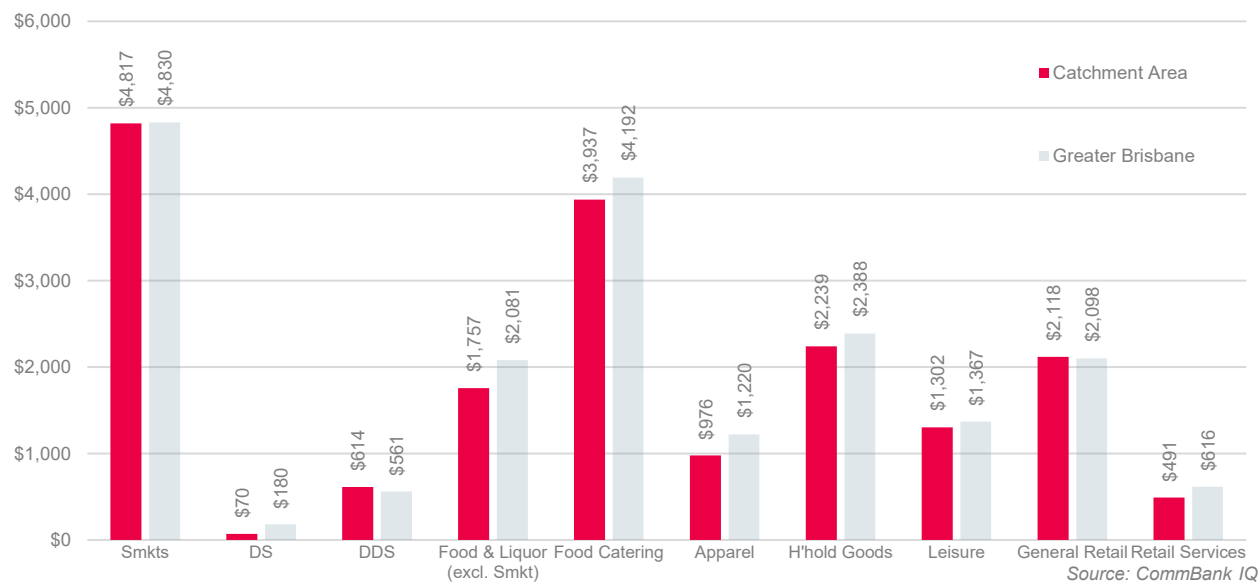


CHART 3.4. CATCHMENT AREA FOOD CATERING SUB-CATEGORIES EXPENDITURE VARIATION FROM GREATER BRISBANE BENCHMARK, 2024/25



Source: CommBank IQ

TABLE 3.3. CATCHMENT AREA RETAIL EXPENDITURE BY KEY COMMODITY GROUP, 2025 – 2046

Y/E June	Smkt	Dept Store	Discount Dept Store	Food & Liquor	Food Catering	Apparel	H'hold Goods	Leisure	General Retail	Retail Services	Total Retail
2025	69.6	1.0	8.9	25.4	56.9	14.1	32.4	18.8	30.6	7.1	264.7
2026	74.5	1.1	9.5	27.2	61.2	15.2	34.8	20.2	32.9	7.6	284.4
2029	87.2	1.3	11.3	31.8	72.7	18.0	41.3	24.0	39.1	9.1	335.8
2031	96.3	1.5	12.6	35.1	81.1	20.1	46.1	26.8	43.6	10.1	373.5
2036	119.2	1.8	16.0	43.5	102.9	25.5	58.5	34.0	55.3	12.8	469.6
2041	130.3	2.1	18.0	47.5	115.3	28.6	65.6	38.1	62.0	14.4	521.8
2046	137.9	2.2	19.5	50.3	125.1	31.0	71.1	41.3	67.3	15.6	561.3
Expenditure Growth											
2025-46	68.3	1.2	10.6	24.9	68.2	16.9	38.8	22.5	36.7	8.5	296.7
Average Annual Growth Rate											
2025-46	3.3%	3.8%	3.8%	3.3%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.6%

*Constant 2024/25 dollars & including GST

Source : CommBank IQ, Location IQ

4 Competitive Environment

This section of the report provides a summary of the existing and proposed competitive developments in the surrounding region for the proposed Bannockburn McDonald's development.

4.1. Food Catering Competition Overview

- i. Competitive facilities of most relevance to the proposed fast food outlets with drive-thru include existing and proposed food catering facilities that are provided within and beyond the catchment area.
- ii. Food catering facilities within Bannockburn and surrounds are provided in a number of locations and formats, including:
 - Within designated shopping centres/precincts.
 - Within retail strips and precincts along major roads.
 - Single operators within the nearby Yatala industrial precinct which primarily service the immediate worker population.
 - Other free-standing sites.

4.2. Within the Catchment Area

- i. Table 4.1 presents a summary of food catering tenants within the Bannockburn catchment area, while Map 4.1 summarise the provision of facilities illustratively as well as identifying the national brands within the region. Key points to note include:
 - The United service station to the immediate east is 24 hours and includes Quikstop. Next to the Quikstop there is also a 24/7 laundromat, Pie Face, and two other shops for lease (in the order of 50- 60 sq.m each).
 - The McDonald's site is west of the United service station, on the corner with Carl Heck Boulevard, which is opposite one of the entrances to Bannockburn Village Shopping Centre. This entrance fronts a large Woolworths direct-to-boot facility. Other tenants within Bannockburn Village Shopping Centre include:

▪ Woolworths	▪ Bannockburn Family Dental
▪ Bannockburn Medical Centre	▪ Chempro Chemist
▪ Bannockburn News Cignall	▪ BWS Liquor
▪ Coco Nails	▪ Post office lockers
▪ Wara Sushi	▪ Amalfi Pizza Pasta

- Isaac Cafe
- Windaroo Village is ~1.8 km to the north, at the northern intersection of Carl Heck Boulevard and Beaudesert-Beenleigh Road, opposite the Windaroo Valley State High School. Windaroo is anchored by a small IGA Friendly Grocer supermarket (~600 sq.m) as well as the following tenants:
 - Liquorland
 - Snap Fitness
 - Windaroo Village Bakery
 - Windaroo TSG Newsagency
 - Acquire Physiotherapy
 - Qualitas Medical Practice
 - Domino's Pizza
 - One Vacancy (~50 sq.m)
- Windaroo Lakes Golf Club includes a restaurant, Beauty salon, Barber and golf shop, 1.9 km to the north-west.
- ii. Overall, the catchment area contains approximately 6 food catering tenants, accounting for around 500 sq.m of GLA. The supply is predominately comprised of dine-in and shopping centre operators, offering restricted choice and operating hours. There are no drive-thru food catering facilities within the catchment area. Food catering tenants are most heavily concentrated in centres along Beaudesert Beenleigh Road. Overall vacancy levels across the catchment area are limited.
- iii. The existing supply is predominantly oriented toward dine-in formats, local walk-in patronage and offers relatively limited trading hours. There are no facilities offering a convenience-based, drive-thru format that are accessible to passing traffic within the catchment area. On this basis, the proposed development would introduce a food catering offer that is currently not represented in the catchment area and would not be materially constrained by existing facilities.

4.3. Beyond Catchment Area

- i. Significant collections of food catering facilities beyond the Bannockburn catchment area are primarily along major roads and adjacent to other retail destinations. These facilities include drive-thru operators clustered on corner sites, with larger strip and shopping centre-based outlets nearby.
- ii. Around 2.5 km to the north, on Beaudesert-Beenleigh Road, Windaroo Tavern with Star Liquor bottle shop as well as a 7-Eleven service station, and Pirahna car wash are provided.

Beenleigh

- **Beenleigh** (~5 km to the north) is a significant retail destination with over 40,000 sq.m of GLA and around 30 food catering tenancies, including KFC, McDonald's, Guzman y Gomez, Zarraffa's, Domino's Pizza, Hungry Jack's, Taco Bell, and others. Major retail destinations include:
 - **Beenleigh Marketplace** totals 17,860 sq.m including over 50 specialty shops with some nine food catering tenancies (none with drive-thru).
 - **Beenleigh Mall** (7,200 sq.m) includes some five food catering tenancies with Red Roster provided as a pad site with drive thru.

- **Beenleigh Village** is a medical/dining precinct with six food catering tenants. National retail tenants include Hungry Jack's (drive-thru), Taco Bell (Drive-thru), The Yiros Shop and Subway.
- **McDonald's (440 sq.m)** and **KFC** operate drive-thru stores in Beenleigh with extended trading hours. This is the closest McDonald's to the proposed Bannockburn McDonald's site. These drive-thru facilities serve local residents and passing traffic in Beenleigh and would not compete directly with the proposed Bannockburn development.

Mount Warren Park

- **Mt Warren Park Shopping Village**, 5.5 km to the north-east includes four food catering tenants.
- **Mt Warren Park Shopping Centre** is anchored by a Coles supermarket and includes only two food catering tenants, namely Coffee Cube and Sushi Moru.
- **Brodies Chicken & Burgers** (drive-thru), **Full On Takeaway Fish & Chips**, **Wildbean Café** are provided in free standing formats to the west of Mt Warren Park Shopping Centre.

Holmview

- **Holmview Central** is a full-line Woolworths supermarket based shopping centre, 7.4 km to the north-west. The centre includes 17 specialty shops, with some 10 food catering tenants. McDonald's is provided in a pad site with drive-thru.
- **Oporto Holmview** with drive-thru is west of the centre with a 7-Eleven service station, accessible via Gardiner Road.

Yatala

- There are some 10 food catering tenants within the Yatala Industrial Precinct, including four national tenants, namely McDonald's, Subway, Guzman Y Gomez and Starbucks. These facilities would primarily service the significant worker population within the Yatala Industrial Precinct.

- iii. Ultimately, while there are several drive-thru restaurants beyond the Bannockburn catchment area, these facilities primarily service their immediate local employment precincts, passing traffic along major arterial roads, or within sub regional and neighbourhood shopping centres. Given the distances from the subject site, customer segments and trading formats, these outlets are not considered to materially constrain the proposed development at Bannockburn.

4.4. Proposed Retail Developments

- i. Key developments assumed in our analysis are as follows:
 - Brookhaven Village (6,150 sq.m) in Bahrs Scrub is approved to include a full-line supermarket, speciality shops as well as commercial office and community uses. The centre is assumed to open by 2028/29. Some food catering tenants are likely as part of the development; however, it is not expected that any will be provided in a drive thru format.

- The expansion of Holmview Central is approved, with site works underway. The expansion will include a full-line Coles (4,100 sq.m), additional specialty shops (1,690 sq.m), a tavern as well as two external fast-food operators (with drive thru facilities). Completion is assumed FY2029.

4.5. Summary

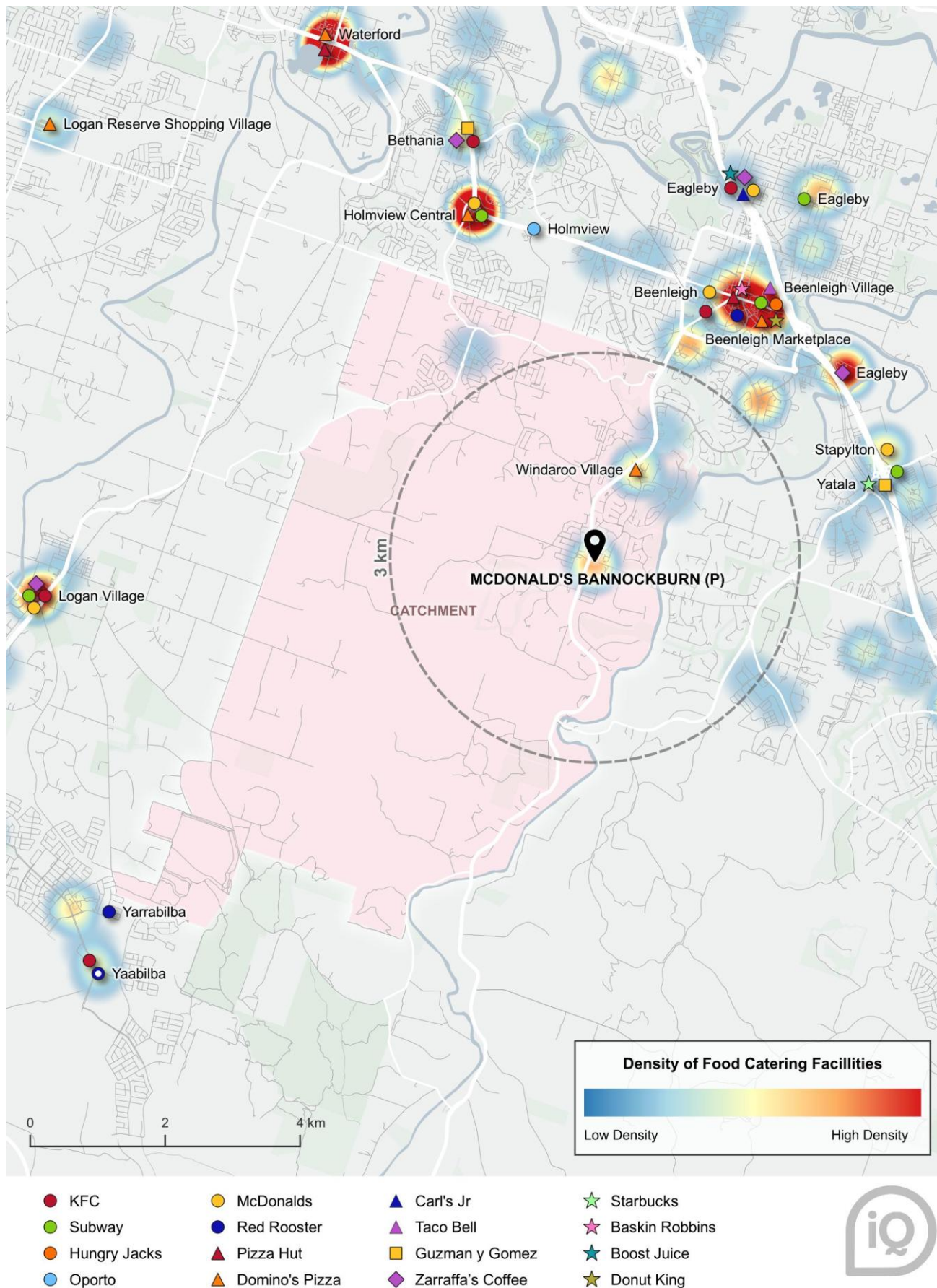
- i. Overall, some 500 sq.m of food catering floorspace is provided within the catchment area, these tenants would likely achieve sales in the order of \$5 million.
- ii. The catchment area currently spends some \$56.9 million on food catering, indicating that less than 9% of existing food catering expenditure is retained within the catchment area. As such, over 91% of catchment area food catering expenditure would go to facilities beyond the catchment area (i.e. escape expenditure).

TABLE 4.1. FOOD CATERING PRECINCTS AND TENANTS

Food Catering Tenants	Tenant Count	Indicative GLA (sq.m)
Within the Catchment Area	<u>6</u>	<u>500</u>
United service station	1	50
Pie Face		
Bannockburn Village Shopping Centre	3	200
Wara Sushi, Amalfi Pizza Pasta, Isaac Cafe		
Windaroo Village	1	100
Domino's Pizza		
Windaroo Lakes Golf Club	1	150
Restaurant		
Beyond the Catchment Area		
<u>Mount Warren Park</u>	<u>9</u>	<u>1,150</u>
Mt Warren Park Shopping Village	4	400
Milan Indian Cuisine, Super Pizza, Pizza and Ribs, Mount Warren Park Seafood and Salad		
Mt Warren Park SC	2	300
Coffee Cube, Sushi Moru		
Other	3	450
Brodie's Chicken & Burgers, Full On Takeaway Fish & Chips, Wildbean Café		
<u>Beenleigh</u>	<u>28</u>	<u>4,100</u>
Beenleigh Marketplace	9	600
Domino's Pizza, Donut King, Café' 63, FU Wok & Roll, Kebab Zone, Mcarvery, Sushi Giru, Sushi Jin, Tea Talk		
Beenleigh Mall	5	500
Red Rooster, Degani, Golden Good & Carvery, Happy Sushi Park, Sam's Patisserie and Café		
Beenleigh Village	6	800
Taco Bell, Hungry Jack's, The Yiros Shop, BBC Chicken & Beer, Subway, Sushi Arai		
Distillery Road Market	2	1,200
Zarrafra's Coffee, Beenleigh Tavern		
Other	6	1,000
Baskin Robbins, Pizza Hut, McDonalds (440 sq.m), KFC, Vinny's Pizza Pasta Ribs, Bobby's Indian Cuisine		
<u>Holmview</u>	<u>11</u>	<u>1,700</u>
Holmview Central	10	1,500
McDonald's (450 sq.m), Subway, Domino's Pizza, 7 Seas Fish 'n' Chips & Takeaway, Ahi Thai, Anatolian Kebabs, Burrito Bar, Mister Q Café, Randhawa Indian Cuisine, Warra Sushi		
Other	1	200
Oporto		
<u>Yatala</u>	<u>10</u>	<u>1,500</u>
McDonald's (450 sq.m), Subway, Guzman Y Gomez, Starbucks, Yatala Pies, Caity's Café, Wok & Roll Snackbar, Broken Hearts Burger Club, Yatala Kebab(Pizza), On The Run Café		

Source: Location IQ Database

MAP 4.1. BANNOCKBURN CATCHMENT AREA FOOD CATERING TENANTS



5 Assessment of Potential

This section of the report considers the sales potential for the proposed Bannockburn McDonald's restaurant as well as the likely trading and other impacts that can be anticipated following the construction of the proposed development.

5.1. Food Catering Industry Overview

- i. In Australia, the food catering market (comprising fast food and take-away food stores) is a \$29.7 billion industry, comprising in excess of 26,800 businesses. There are a range of competitors within the market, of which the major ones include:
 - **McDonald's Australia:** operate over 1,000 stores and holds an estimated 19.3% market share (\$5.7 billion revenue).
 - **Competitive Foods Australia:** ~460 Hungry Jacks stores and holds a 9.3% market share (\$2.8 billion revenue).
 - **Yum! Restaurants:** include approximately 430 KFC stores, with an estimated 7.5% market share (\$2.2 billion revenue).
 - **Domino's Pizza:** franchisor of Domino's Pizza stores, with a 4.2% market share (\$1.2 billion revenue).
 - **Collins Foods:** operate around 280 KFC stores and 30 Taco Bell stores with a market share of more than 4.1% (\$1.2 billion revenue).
 - **Craveable Brands:** include stores across the Red Rooster, Chicken Treat, and Oporto brands that combine for a market share of around 3.3% (\$978.4 million revenue).
 - **Subway:** franchisor for over 1,000 Subway stores across Australia, with a market share of 3.2% (\$963.9 million revenue).
- ii. IBISWorld (March 2025) estimate that by 2028/29, the fast food and takeaway market will exceed \$35.4 billion in revenue across 31,285 businesses (43,672 establishments) and some 280,965 employees (\$8.6 billion in wages).
- iii. The operational aspects of each brand/group vary with some of the key points including:
 - **Hours of trade:** the largest chains, such as McDonald's, often trade 24-hours, 7-days a week, offering specific breakfast, lunch, and dinner menus. A substantial number of other traders having limited trading hours, providing only breakfast/lunch or lunch/dinner offerings.

- **Home delivery:** technological advancements, the pandemic, and other delivery services (Uber Eats, Deliveroo, Menulog etc) have driven a rapid increase in online delivery within the industry. This was previously more associated with pizza chains, but now extends to all major operators and even smaller stores, offering them the opportunity to deliver to their customer's homes. These services and platforms have boosted industry revenue, however, have also restricted profit margins – given major partners charge high commission in the order of 35% of the total order value.
 - **In-store seating:** several operators provide in-store seating while other facilities have a relatively limited offering. Some brands have begun experimenting with drive-thru/pick up only (no seating) stores in Australia, as well as dark kitchens – which offer delivery services only (no access for the general public).
 - **Drive-thru facilities:** an increasingly important element of food catering restaurants, with up to 70% of a restaurant's sales coming through these facilities. This reinforces their proposition as convenience-based facilities, particularly in the midst of competition from popular food delivery services (Uber Eats, Deliveroo, etc).
 - **Price Point:** the prices that operators charge varies, with fast food facilities typically charging between \$5 - \$15 per meal. By way of comparison, more traditional cafes and restaurants charging between \$15 - \$25 per meal, while more expensive restaurants and hotels/taverns typically charging in excess of \$25.
 - **Licensed premises** – in Australia, most of the major food catering chains do not include the provision of alcohol, while a range of restaurants and other competing facilities contain licensed premises or offer bring your own (BYO) services.
- iv. The vast difference in offerings between the various brands and groups means that the customer segments each store services can vary significantly depending on location, meal-time, the group who people are dining with (family vs. friends vs. alone), and day of the week.
- v. The provision (number) of food catering operators varies between different chains, with Table 5.1 outlining key national fast food brands represented throughout the Logan LGA, Greater Brisbane, and Queensland. As indicated, the provision of fast food restaurants ranges between 20,000 to more than 100,000 persons dependent on the brand. This analysis is indicative only, given that there are likely gaps within each brands network across such a large geographical area.
- vi. One McDonald's site is provided for every 25,000 persons across the Greater Brisbane and every 23,600 persons across Queensland, compared with the catchment area population for the subject site of over 24,300 persons in 2046.
- vii. The proposed Bannockburn McDonald's development would represent a convenient offer along a major road, adjacent a shopping centre and would provide the local population with increased choice, access to drive-thru convenient facilities, price competition, and convenience – offering 24 hour trade.

TABLE 5.1. LOGAN LGA, GREATER BRISBANE AND QLD FAST FOOD PROVISION

	Logan		Greater Brisbane		QLD	
	No of Stores	Persons Per Store	No of Stores	Persons Per Store	No of Stores	Persons Per Store
Subway	19	21,200	149	19,000	300	19,000
McDonald's	18	22,400	111	25,500	234	24,300
Domino's Pizza	17	23,700	111	25,500	212	26,900
El Jannah	0	n.a.	0	n.a.	0	n.a.
Starbucks	1	403,500	23	123,200	31	183,600
KFC	16	25,200	88	32,200	179	31,800
Red Rooster	9	44,800	62	45,700	124	45,900
Hungry Jacks	7	57,600	50	56,700	106	53,700
Pizza Hut	7	57,600	44	64,400	87	65,400
The Coffee Club	7	57,600	51	55,600	102	55,800
Zambrero	2	201,800	24	118,100	59	96,500
Oporto	2	201,800	14	202,400	25	227,700
Guzman Y Gomez	3	134,500	42	67,500	77	73,900
Zarrafra's Coffee	10	40,400	34	83,300	69	82,500
Chicken Treat	0	n.a.	0	n.a.	0	n.a.
Taco Bell	3	134,500	11	257,600	13	437,900
Total Fast Food Provision	121	3,300	814	3,500	1,618	3,500

Source: Location IQ Database

Below Average Provision | Above Average Provision vs QLD Benchmark

5.2. McDonald's Australia Overview

- i. The first McDonald's store opened at Yagoona (Sydney) in 1971, and the brand has since grown to over 1,000 restaurants across Australia, of which 110 are located within the Greater Brisbane.
- ii. Other key points to consider about McDonald's stores throughout Australia include:
 - McDonald's Australia's revenue is estimated at almost \$7 billion – or an average of around \$7 million per store.
 - McDonald's estimate that 1.4 million customers transact each day, or an average of approximately 1,400 persons per store.
 - Research undertaken by Roy Morgan in 2018 indicated that McDonald's was visited (on average) by 52.7% of the population on an annual basis. Additionally, the research found that over 17 million Australians aged 14+ years eat takeaway food, indicating that McDonald's restaurants would serve nearly 10 million unique persons per year.
 - Drive-thru facilities have become an increasingly important component of McDonald's operations, with these facilities often accounting for up to 70% of sales.
 - McDonald's has a low price point, with the typical customer being a lower income, value-conscious family.

- Around 10% of customers visit McDonald's stores between 10:00 pm to 6:00 am when very few other outlets are open, serving an important role within the community during that time frame. This is particularly beneficial in areas where there is a strong concentration of shift workers, as is likely to be the case for the local area and infrastructure-focused development precincts nearby.
 - The typical McDonald's catchment is around 20,000 – 25,000 persons.
 - A typical McDonald's store generates 80 – 100 jobs, including full time and part time positions, the majority of which are based in the surrounding local community. Relevantly, McDonald's are also one of the largest employers of youth in Australia.
- iii. In relation to free-standing McDonald's stores in Greater Brisbane, typical site attributes include the following:
- Located adjacent to main roads for maximum exposure to passing traffic.
 - Operate 24-hours, 7-days a week.
 - Include drive-thru facilities.
 - Serve tailored breakfast, lunch, and dinner menus.
 - Include children's play areas and mother's rooms.
 - Offer children's party services.
- iv. In relation to the subject location, the proposed site meets many of the key attributes for a successful McDonald's store including a catchment area population of around 15,000 persons currently, which is projected to increase to over 25,000 persons by 2046. The catchment area is characterised by a higher than average household income levels, Australian born, young, owner-occupied demographic with a high dependence on cars as a mode of transport and a strong level of blue-collar employees, who would likely have a strong affinity with value-based convenience food catering facilities in close proximity to their homes. The catchment area population also spends significantly more on takeaway food, likely due to ever-increasing time pressures on working families. The planned Bannockburn McDonald's will also offer extensive food delivery services across extended hours of the day, which are not currently provided by existing food catering tenants in the immediate area.

5.3. McDonald's Sales Potential

- i. To assess the potential economic benefits and impacts that may arise from the proposed Bannockburn McDonald's development, as well as the sales level which the development is projected to achieve are outlined.
- ii. The sales performance of any retail facility, be it an individual store or a collection of stores provided in a shopping centre or precinct, is determined by a combination of the following critical factors:
 - The composition and quality of the facility, including the major trader or traders; the specialty mix; centre layout and configuration; ease of accessibility and parking; and the overall feel of the centre.
 - The size of the available catchment which the facility serves.
 - The location and strength of competitive retail facilities.

- iii. The sales potential for the Bannockburn McDonald's development is now considered accounting for these factors.
- iv. The proposed McDonald's at Bannockburn (410 sq.m) will include a drive-thru restaurant facility and be provided over a single level. The proposed store would generate sales from the food catering market, currently estimated at \$56.9 million (2025), growing to \$125.1 million in 2046, reflecting average annual growth rate of 3.8% (refer Table 3.3 previously).
- v. As outlined previously, McDonald's Australia's industry-specific revenue is estimated to reach \$7 billion, or an average of around \$7 million per store.
- vi. For the purposes of this analysis, we project the proposed McDonald's restaurant at Bannockburn will achieve sales of around \$6.15 million in 2028/29, representing sales of around \$15,000 per sq.m.
- vii. If Bannockburn McDonald's is to achieve total sales of around \$6.15 million, this would represent 7.7% of the overall local resident catchment area food catering market in 2028/29 (\$6.15 million divided by the \$80.0 million in 2028/29) conservatively allowing for 10% from beyond the catchment area to account for passing traffic.

5.4. Sales Impacts

- i. This sub-section of the report outlines the likely sales impacts on competitive retail facilities as a result of the development of the proposed McDonald's at Bannockburn.
- ii. It is important to note that impacts outlined in this report are indicative as it is difficult to precisely project the sales impact from the opening of a new store/centre on existing retail facilities. Several factors can influence the impact on individual centres/retailers, including but not limited to:
 - Refurbishment/improvements to existing stores.
 - Expansions to existing stores.
 - Loyalty programs of existing retailers.
 - The existing centre mix and how it competes with the proposed development.
- iii. For all these reasons and other similar factors, sales impacts outlined in this report should be used as a broad indication.
- iv. Table 5.2 outlines projected sales impact from the proposed McDonald's at Bannockburn. The steps involved in assessing the sales and impacts on competitive centres are presented as follows:
 - **Step 1:** Estimate sales levels for existing centres in the 2024/25 financial year.
 - **Step 2:** Projected sales are included for existing and proposed developments in 2028/29, the first full year of trading for the proposed McDonald's restaurant. These projections also allow for retail market growth and are presented in constant 2025 dollars (i.e., excluding inflation).
 - **Step 3:** Outline the change in sales at each centre in 2028/29 as a result of the opening of the proposed McDonald's development.

- **Step 4:** Show the impact on sales in 2028/29, both in dollar terms and as a percentage of sales.

v. The key information outlined in Table 5.2 is summarised as follows:

- Projected sales for the proposed McDonald's restaurant are \$6.15 million in 2028/29 (in constant 2025-dollar terms).
- The store would have a direct impact on other McDonald's stores within the surrounding area. It is expected that around one-third of Bannockburn McDonald's sales will be redirected from other nearby McDonald's restaurants (i.e. Beenleigh, Holmview and Yatala). A new McDonald's at Bannockburn would provide a more convenient offer for residents of Bannockburn and surrounds who are currently directing their spending to other nearby McDonald's stores or to other facilities in the immediate area. In addition, other fast food drive-thru facilities such as Hungry Jack's, Red Rooster, Taco Bell, Zarraffa's, and others within region would also be impacted to some degree.
- Around -\$0.2 million is projected as a result of a redirection of spending from competitive facilities within the Bannockburn catchment area in 2028/29, equivalent to less than one month's growth in the food catering market, including small impacts on other food catering facilities in Bannockburn as well as on at Windaroo.
- Beyond the catchment area, the largest impact in dollar terms would be on Beenleigh at -1.0% or -\$2.8 million. This would largely fall of the McDonald's at Beenleigh as well as other drive-thru fast food restaurants in Beenleigh. The proposed development will not impact on the continued operation and viability of retail within the Beenleigh, with Beenleigh Marketplace, Beenleigh Mall and Beenleigh Village all anchored by a strong mix of tenants and over 40,000 sq.m retail and non-retail specialty stores.
- Holmview is projected to be impacted by -0.5% or -\$0.9 million. This would largely fall of the McDonald's at Holmview Central, as well as other existing and approved drive-thru facilities. The proposed development will not impact on the continued operation and viability of Holmview Central.
- The largest impact in percentage terms would be on McDonald's and other drive-thru, fast food facilities in the Yatala industrial precinct (-\$1.0 million or -2.0%).
- Other impacts on facilities not represented in Table 5.2 are projected to total up to -\$0.5 million, including on free-standing drive-thru sites further afield.
- The associated impact would not affect the viability of these food catering facilities.
- In percentage terms, no single centre is projected to be impacted by more than -5.0%; well within the normal competitive bands.
- Some centre sales will be impacted by the opening of the Holmview Central expansion (anchored by a full-line Coles supermarket) and the Brookhaven Village (anchored by a full-line Woolworth supermarket). The subject development includes one fast food outlet with drive-thru and would have no impact on supermarkets or the retail hierarchy of these centres. Consequently, there are no cumulative impacts of note. Competitive impacts from the proposed development would also be rapidly ameliorated given the market growth within the food catering market.
- Although overall spending impacts would be low, some individual tenant impacts would be higher (in percentage terms) than that indicated, including McDonald's drive-thru facilities at Beenleigh, Holmview and

Yatala. It is emphasised that McDonald's would be the committed operator at the proposed site, indicating that the brand has assessed the levels of impact on its existing and future store network.

- Bannockburn McDonald's projected sales are \$6.15 million. This is equivalent to approximately 1.5 years of growth within the catchment area food catering spend market.
- Retained food catering expenditure is less than 9% currently. With the introduction of Bannockburn McDonald's, retained expenditure in 2029 would be ~15%, which is considered low.

vi. Overall, the proposed McDonald's fast-food outlet at Bannockburn would not impact on the viability or continued operation of any existing or future retail facility or food catering store within the catchment area or the surrounding region. Projected impacts are well within normal competitive bounds.

TABLE 5.2. MCDONALD'S BANNOCKBURN PROJECTED IMPACTS, 2025 – 2029

	Unit	Estimated 2025	Projected 2029 Pre Dev. Post Dev.		Impact 2029 \$M %	
McDonalds Bannockburn	\$M	n.a.	n.a.	6.2	n.a.	n.a.
Within the Catchment Area						
Bannockburn (including adjacent site)	\$M	46.0	52.9	52.8	-0.1	-0.2%
Windaroo	\$M	11.4	13.8	13.7	-0.1	-0.5%
Beyond the Catchment Area						
Mount Warren Park	\$M	50.6	58.2	58.0	-0.3	-0.5%
Beenleigh	\$M	240.1	283.8	281.0	-2.8	-1.0%
Holmview	\$M	124.3	186.9	186.0	-0.9	-0.5%
Yatala	\$M	40.0	51.1	50.1	-1.0	-2.0%
Bahrs Scrub	\$M	0.0	45.0	44.8	-0.2	-0.5%

*Constant 2024/25 dollars & including GST

¹ Proposed centres and expansions assumed to be trading for a full year by FY2029

5.5. Employment and Consumer Impacts

i. The proposed Bannockburn McDonald's development would result in a range of important economic benefits which will be of direct benefit to the local community. These key positive employment and consumer impacts include:

- The provision of a wider range of retail facilities near residents' homes, including drive-thru and increased food delivery services of which there are limited options.
- Increased convenience and price competition for residents.
- Improved customer amenity, design, and aesthetic for the residents by way of a new and modern development.

Ongoing Employment Generation

- Table 5.3 summarises the projected level of ongoing employment likely to be generated by the McDonald's store (410 sq.m) at Bannockburn.
- The proposed development is consequently projected to employ a full-time equivalent of around 25 persons. Taking a conservative view and allowing for an estimated 10% of the total increase to be because of reduced employment at existing retail facilities, net additional jobs are estimated at 22. This is a full-time equivalent figure, with the actual number of jobs much greater allowing for both full-time and part-time positions (closer to 100 employees).
- The additional 22 permanent equivalent retail employees would earn an average annual wage of around \$49,717 (full-time equivalent), based on Average Weekly Earnings data released by the ABS (Cat. 6302.0) in November 2025. This equated to an additional \$1.1 million in salary/wages for the local economy, as a direct result of the proposed development.

TABLE 5.3. ESTIMATED ONGOING EMPLOYMENT

Component	Total Floorspace (sq.m)	Employment Potential		
		Employment per 1,000 sq.m	Indic. Total Jobs	Net Increase ¹
McDonalds Bannockburn	410	60.0	25	22

1. Indicates the estimated number of net additional ongoing jobs as a result of the proposed development

Source : Australian National Accounts: Input-Output Tables 1996-97

Construction

- Based on a review of comparable developments and information provided by McDonald's, construction of the entire development is estimated to incur total capital costs of some \$3.1 million, generating significant employment within the construction and associated industries during the development of the project.
- By using the appropriate ABS Input/Output Multipliers that were last produced in 1996/97 and a deflated estimated total capital cost of construction of \$1.22 million (i.e., in 1996/97 dollars), it is estimated that the construction period of the development would directly create some 9 full-time, part time and temporary jobs over the development timeline (refer Table 5.4).

TABLE 5.4. ESTIMATED CONSTRUCTION GENERATED EMPLOYMENT LEVELS

Metric	Total
Estimated Capital Costs of Construction	
Estimated Capital Costs 2024/25 (\$M)*	\$3.1
Estimated Capital Costs 1996/97 (\$M)	\$1.22
Direct Employment Generation	
Construction Jobs per \$1 million (2024/25)	2.80
Total Construction Jobs¹	9

Source : Australian National Accounts: Input-Output Tables 1996-97

Employment totals include both full-time and part-time work. Indicates the estimated number of jobs over the life of the construction project plus ongoing multiplier effects, for the equivalent of one year

Multiplier Effect

- Overall, it is estimated that the proposed development will directly generate the following jobs (refer Table 5.5):
 - Ongoing Employment from Planned Floorspace: 22 jobs
 - Construction Phase: 9 jobs (noting these are full-time equivalent jobs, with up to 100 contractors from various trades working over the course of the construction period).
- In addition to this direct employment, multiplier effects will flow through the local economy and indirectly generate additional employment opportunities through ancillary businesses/suppliers that support the development and services, as well as additional consumption expenditure by workers employed within the precinct (spending wages).
- Again, by using the appropriate ABS Input/Output Multipliers that were last produced in 1996/97 and adjusting for inflationary and other changes to present, it is estimated that an additional 35 jobs will be created indirectly.

- ii. Overall, the proposed development is likely to generate 65 jobs directly and indirectly.

TABLE 5.5. ESTIMATED TOTAL EMPLOYMENT GENERATED

Metric / Category	Est. Net Employment Increase ¹	Employment Multiplier Effects	Total Employment
Ongoing Employment from Planned Floorspace			
McDonalds Bannockburn	22	21	43
Construction Phase			
Direct Employment Generation	9	14	22
Net Additional Employment	31	35	65

Source: McDonald's

1. Net increase includes an allowance for reduced employment levels at impacted centres estimated at 10% of the total increase

6 Needs Analysis

The final section of this report summarises the key conclusions of the impact analysis for the proposed Bannockburn McDonald's development.

'Need' or 'Community Need' in a planning sense is a relative concept that relates to the overall wellbeing of a community. A use is needed, for example, if it would, on balance, improve the services and facilities available in a locality. The reasonable demands and expectations of a community are important, therefore, in assessing need.

A number of important factors that relate to need, and particularly economic need, include:

- Population and demand
- Consumer trends
- Location
- Impacts on existing retail facilities
- Impacts on retail hierarchy
- Net community benefits

6.1. Population and Demand

- i. The Bannockburn catchment area population is currently estimated at 14,952 persons and is projected to increase to 25,852 by 2046, representing an average annual growth of 2.6%, or 519 persons per year.
- ii. The typical McDonald's catchment is around 20,000 – 25,000 persons.
- iii. On this basis, a McDonald's would be supportable at Bannockburn over the forecast period, based on a catchment area population of more than 25,000 persons in 2046, as well as significant passing traffic.
- iv. Further, the network of McDonald's at other locations would still be sustainable, serving their own growing catchments.
- v. A McDonald's at Bannockburn would also benefit the convenience and choice available to local residents both existing and future.

6.2. Consumer Trends

- i. Retail facilities in Australia, such as the proposed development, play fundamental roles in the economies of Australia's metropolitan areas, having developed around the need to meet consumer demand. The nature of consumer demand continues to develop and evolve, reflecting social changes within society, such as:

- Increasing time pressures on working families.
 - Population and income growth.
 - The evolution of new retail formats and traders.
 - Competitive retail developments and precincts.
- ii. The demands of retailers, as well as consumers, combine to add pressure for additional retail floorspace in existing retail precincts.
 - iii. There is a strong need for convenience-based food catering facilities (particularly those combined with a drive-thru facility, such as proposed at the subject development) within close proximity to the homes of catchment area residents, with consumers visiting food catering facilities multiple times per week on average.
 - iv. Over the past decade, there has been an increasing trend towards convenience shopping. This trend has been largely driven by broader social trends that have resulted in consumers becoming more time poor, such as longer working hours and an increase in the number of women in the labour force.
 - v. Time pressures are ranked at the top of the list of issues that consumers face when undertaking their regular food and grocery shopping. As a result, there is growing demand for convenience shopping facilities to meet the needs of residents.
 - vi. This is particularly the case for an industrial/ blue collar workforce who work shifts early in the morning and late at night, who should be provided with food catering options over an extended period of the day.
 - vii. The provision of a McDonald's drive-thru store at the Bannockburn site would increase convenience and price competition for residents by way of a new and modern facility.

6.3. Location

- i. The Bannockburn development site is at the corner of Bannockburn Road and Carl Heck Boulevard opposite the Bannockburn Village shopping centre. Ingress and egress from Carl Heck Boulevard, as well as Bannockburn Road and Beaudesert-Beenleigh Road (via connection to the adjacent United Petroleum Windaroo).
- ii. Beaudesert-Beenleigh Road is a major arterial north south route, with the nearest available traffic count 1.0 km south of the subject site, at Belivah Creek. Traffic in both directions in 2024 was recorded at 6,764 vehicles per day (~2.5 million per year).
- iii. Given the high-profile nature of the site, it would provide a significant level of convenience, access, and competition for residents of the region.
- iv. The subject site represents a logical location for a McDonald's drive-thru given:
 - The high-profile location along a major arterial route through the region and local area.
 - The large and rapidly growing resident population base.
 - Limited drive-thru facilities in the local area.

- The proposed development would fill a gap in the network of drive-thru facilities within the region with a significant local resident catchment area.
- v. Ultimately, the subject site fills a significant gap in fast-food facilities with drive-thru in the region, offering customers increased choice and convenience close to their homes.

6.4. Impact on Existing and Proposed Retailers

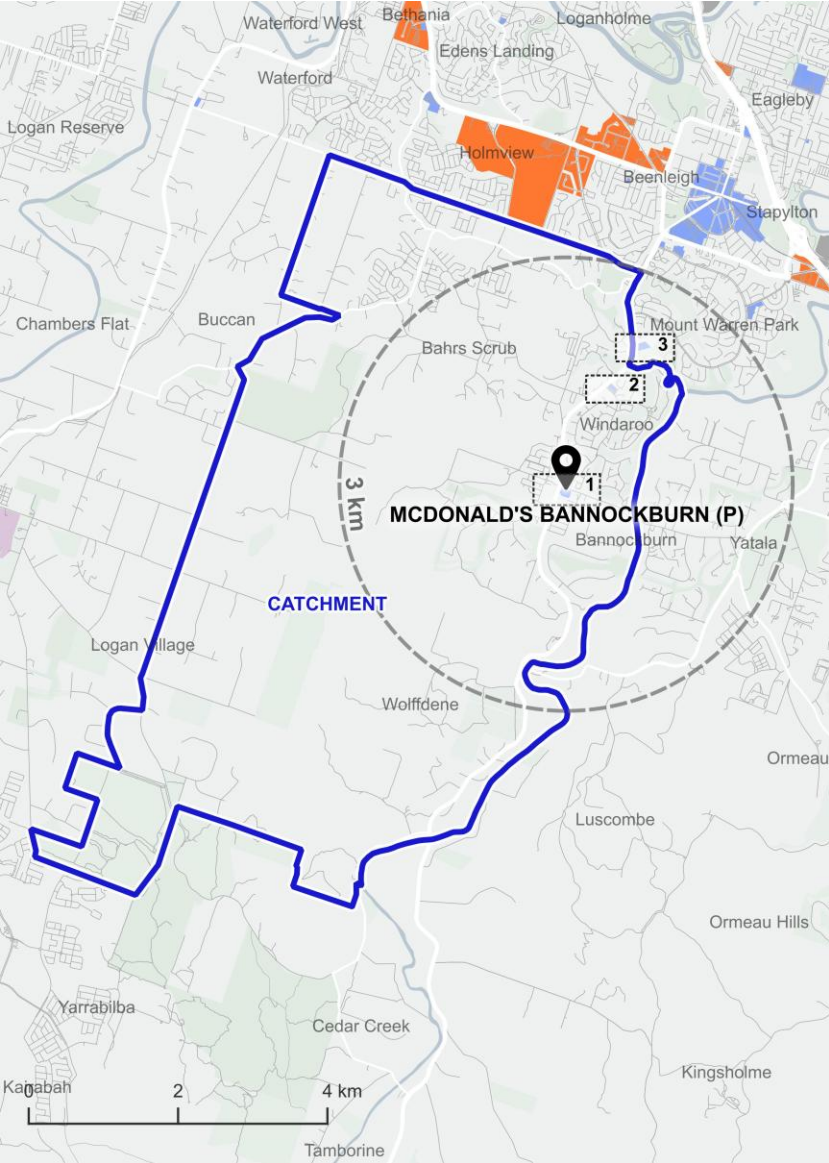
- i. The proposed Bannockburn development would not impact on the viability or continued operation of any existing or future retail facility or food catering store within the catchment area or the surrounding region. Projected impacts are well within normal competitive bounds.
- ii. Further, the development will not impact on the continued operation and viability of centre zoned precincts.
- iii. The proposed development will also provide the local population with increased choice and price competition for their food and dining needs in a convenient location. The proposed development will also offer both food delivery services and 24-hour drive-thru trading, something that is not offered by the existing food catering facilities within the catchment area. Increased competition between retailers is beneficial to consumers, with the proposed development not adversely affecting the surrounding centre hierarchy.
- iv. The proposed development does not include a large provision of floorspace (additional 410 sq.m of retail floorspace) and as such residents will continue to frequent other centres/freestanding takeaway stores in the surrounding area. Projected impacts on these businesses are likely to be limited.

6.5. Alternate Sites

Centre Zoned Land

- i. Centre zoned land within the catchment area is typically located along Beaudesert-Beenleigh Road (Map 6.1) and within Bahrs Scrub (the Brookhaven Estate) (Figure 6.1).
- ii. All centre zoned sites within the catchment area are currently occupied; there are also limited shop vacancies in the retail strips and shopping centres. Additionally, these sites in retail strips or shopping centres would not be appropriate for a drive-thru fast food outlet operator.
- iii. Fast food outlet sites with drive-thru typically require a site area of approximately 3,000 sq.m, with the Bannockburn site at ~5,000 sq.m.
- iv. As shown, the catchment area does not contain suitable sized vacant centre zoned land parcels for the proposed development - other than within Bahrs Scrub. This land is currently approved for the Brookhaven Village shopping centre.
- v. The proposed subject site is ~5,340 sq.m and located next to an existing service station (complementary use) as well as opposite the Bannockburn Village shopping centre.
- vi. The site represents only a small proportion of Low Density Residential Zoned land in the immediate surrounding region.
- vii. It is also not uncommon for food and drink outlets to be located opposite shopping centre and adjacent service stations.
- viii. Overall, the Bannockburn development will provide choice and a high level of convenience in proximity to residents and passing traffic.
- ix. While the subject site is located within the Low Density Residential Zone, it represents a natural extension of the existing Bannockburn Centre zoning, servicing a local convenience centre.

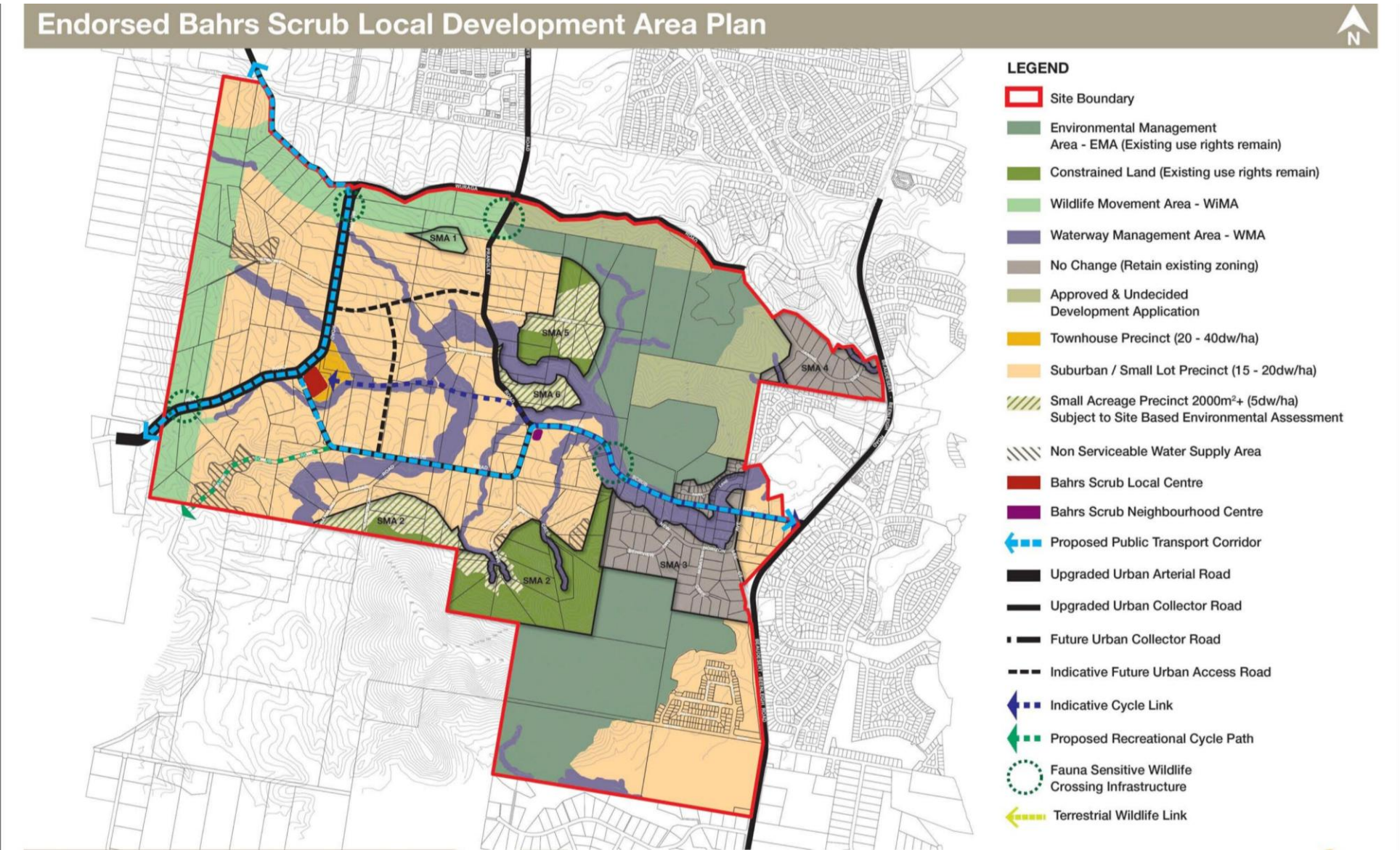
MAP 6.1. BANNOCKBURN CENTRE ZONED LAND



- Land Zoning**
- Centre
 - Low impact industry
 - Mixed use
 - Specialised centre

PhotoMap by nearmap.com

FIGURE 6.1. ENDORSED BAHRS SCRUB LOCAL DEVELOPMENT AREA PLAN



6.6. Net Community Benefits

- i. It is the conclusion of this report that a substantial net community benefit would result from the development of McDonald's Bannockburn, offsetting the trading impacts on some existing retailers. There are substantial positive impacts including the following:
 - Significant improvement in the range of food catering facilities (access to drive-thru facilities) that would be available to residents of Bannockburn and surrounds, increasing convenience for the immediate residential catchment within Bannockburn.
 - The proposed development would improve choice of location and allow for price competition across a range of segments.
 - The proposed Bannockburn McDonald's would represent a convenient offer along a major road, opposite a shopping centre, providing the local population with increased choice, price competition, and convenience, with McDonald's offering 24 hour drive-thru trade.
 - The socio-economic profile of catchment area residents (i.e., higher than average household income levels, Australian born, young, owner-occupied demographic with a high dependence on cars as a mode of transport and a strong level of blue-collar employees) would have a strong affinity with value-based convenience food catering facilities in close proximity to their homes.
 - The project would also result in the creation of additional employment, both during the construction period, and more importantly, on an ongoing basis once the development is complete and operational. In total, 65 jobs are likely to be created both directly and indirectly as a result of the development. This includes a number of youth employment opportunities, as food catering facilities generally employ a large number of younger staff, with McDonald's providing reputable training and further career opportunities. There are opportunities for individuals that reside in the immediate residential areas surrounding the restaurant to be hired to staff the McDonald's, providing more local jobs for the community.
- ii. It is concluded that the combination of the substantial positive economic impacts serves to more than offset the trading impacts that could be anticipated for a small number of existing and proposed stores, particularly fast food outlet, in the region. Further, the impacts would not threaten the viability of any retail facilities/centres.



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