

APPENDIX H

Economic Needs Assessment

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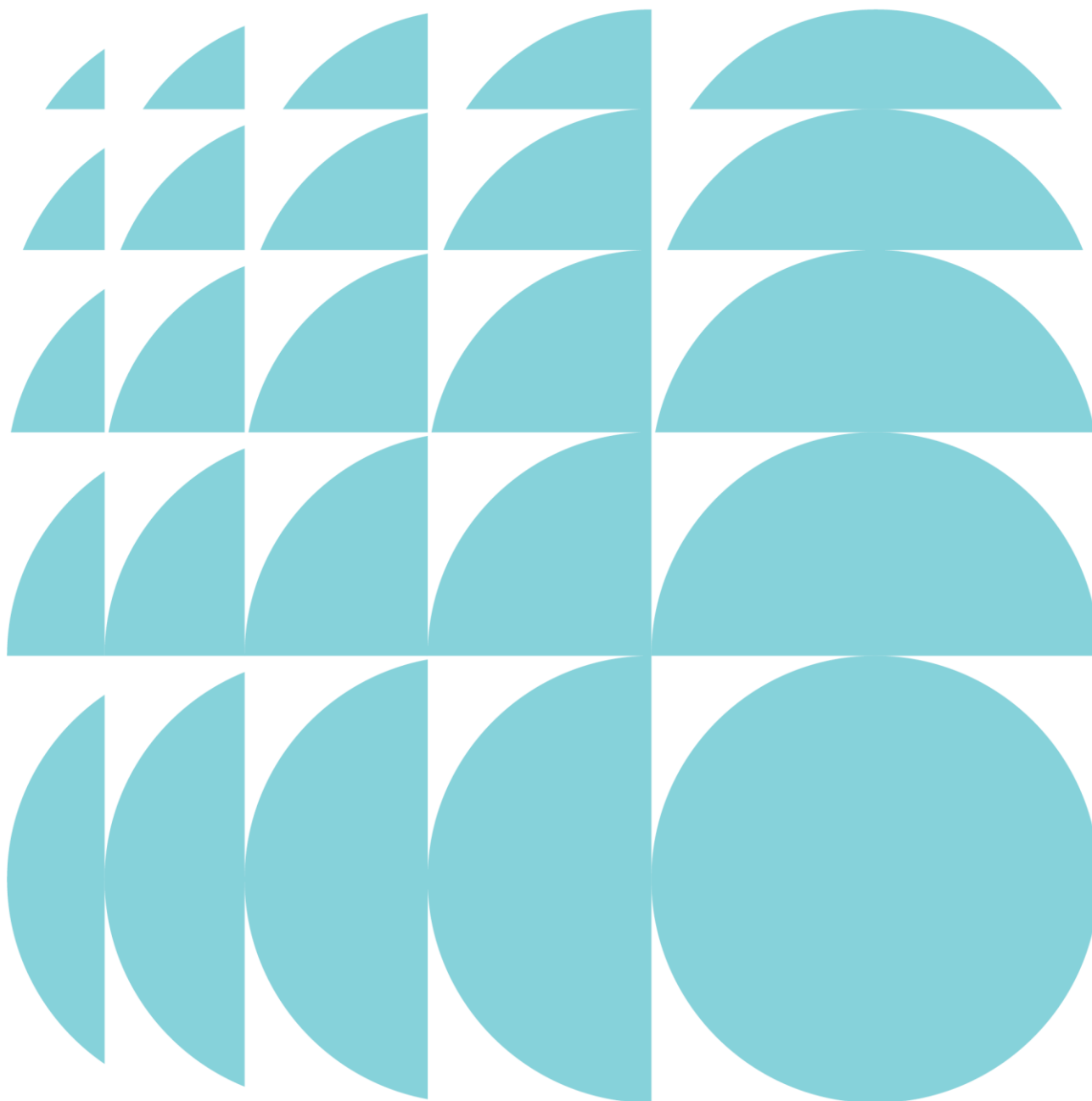
2-26 Hotz Rd, Logan Village

Economic Needs Assessment

Prepared for Start Yarrabilba Pty Ltd

c/- OneFin Property

February 2022 | 3210014



Authorship

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Final report				23 February 2022

Disclaimer

Every effort has been made to ensure the accuracy of the material and the integrity of the analysis presented in this report. However, Ethos Urban Pty Ltd accepts no liability for any actions taken on the basis of report contents.

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Executive Summary

Project Background

OneFin Property is proposing a mixed-use development at 2-26 Hotz Road, Logan Village (the Subject Site). The proposed development is to provide convenience facilities including a service station, two fast food restaurants, and a childcare centre. Pre-commitments have been made by a fast food operator, a fuel retailer and a childcare operator.

The Subject Site has extensive frontage, visibility and access from Waterford Tamborine Road (State Route 95), a major north-south traffic route in the area. A mixed-use development incorporating convenience-oriented uses responds to the locational attributes of the Subject Site and the importance of ensuring a rapidly growing region has access to a range of basic services in convenient locations which reflect local movement patterns.

Catchment Analysis

A Study Area has been defined for the proposed development which covers the suburbs of Logan Village, Yarrabilba, and the northern parts of Cedar Creek and Tamborine. In 2021, the population of the Study Area is estimated at approximately 18,890 persons, having more than tripled from 6,200 persons in 2011. This equates to an average annual growth rate of +11.9% or +940 persons per annum over the period from 2011 to 2016, and an average annual growth rate of +11.6% or +1,600 persons per annum over the period from 2016 to 2021.

The population of the Study Area is forecast to increase rapidly over the next 10-years and beyond. A Study Area population of 33,390 persons is forecast by 2031, a total increase of +14,500 persons on 2021 levels at an average annual rate of +5.9%. Further population growth is expected to result in the Study Area population approaching 40,000 residents by 2036.

Service Station Economic Needs Summary

Currently five service stations are located within the Study Area. The analysis in this report reveals that by 2026, market demand will exist for seven to eight service stations in the study area. Therefore, a market gap exists for new service stations in the area in addition to the approved service station at Yarrabilba.

A service station at the Subject Site would result in a range of benefits including:

- Serving the current need for additional service stations in the Study Area as reflected in relevant expectations of provision
- Serving the increasing demand from a rapidly growing population
- Enhancing choice competition in a manner that places downward pressure on local fuel prices
- Creating job opportunities.

Given the strong growth in fuel consumption by Study Area residents and the expected increase in vehicles travelling along Waterford Tamborine Road, no existing service station in the catchment will have their viability undermined by the proposed development. All other service stations (existing and approved) will remain viable and continue to serve the rapidly growing fuel market generated by the Study Area population and passing trade.

Fast Food Restaurant Economic Needs Summary

Four national brand fast food outlets operate in the Study Area – two at Logan Village (KFC and McDonald's) and two at Yarrabilba (McDonald's and Domino's). Two sites within or adjacent to Yarrabilba are proposing food and drink outlets as part of approved service station developments, while food and drink outlets are approved at the Logan Village Centre. Given the strong population growth occurring in the Study Area and the competitive context, demand for two fast food outlets can be identified at the Subject Site.

Two fast food outlets at the Subject Site would result in a range of benefits including serving the needs of the community for fast service food options. Given the level of food catering expenditure of Study Area residents, as well as the competitive context, the proposed development of two fast food outlets at the Subject Site would not threaten the viability or function of the designated centres in the surrounding region (to the extent this is relevant to planning considerations).

Childcare Centre Economic Needs Summary

Australia has one of the highest levels of female university education in the world and currently more than half of all traditional families with a child aged 0-4 years have two working parents. Demand for childcare places is expected to continue to rise in line with increased female participation in the workforce.

At 2021 five childcare centres were located in the Study Area, providing a total of 599 childcare places. A childcare centre recently opened at Yarrabilba and another childcare centre is to open shortly. The Study Area population currently includes an estimated 1,680 children aged 4 years or younger, and at 2021 an undersupply of long day care places in the study area exists. This undersupply will increase slightly by 2026 even after allowing for new and approved childcare centres.

Conclusion

The proposed development of a service station, two fast food outlets and childcare centre at the Subject Site responds to existing and forecast market demand. Surrounding the Subject Site is a key growth area of Brisbane experiencing significant population growth which is forecast to continue for the foreseeable future.

In addition to meeting an identified market demand, the proposed development will introduce new brands for the local community. Two national operators are committed to the Subject Site as a reflection of the demand in the Study Area.

It is our view the proposed development is consistent with the Logan Planning Scheme 2015 as relates to our expertise on economic matters. A community and economic need for the proposed uses is identified; the development is of an appropriate scale; and the proposed uses will not have unacceptable adverse effects on any existing or planned centres (to the extent that this is relevant as a planning consideration). While the proposed uses are often located within activity centres, uses such as service stations, fast food outlets and childcare centres are not required to be provided for exclusively in centres and as such are found in a variety of non-centre locations in the surrounding region.

In summary, the proposal will deliver additional services to a rapidly growing local community; complies with the Logan Planning Scheme; caters to a demonstrated market need; will not have any adverse impacts to any existing or planned centre in the region; and will not affect the viability of any designated centre.

The development will result in a range of benefits for the community such as increasing choice, investment in the local area and creating local jobs.

Introduction

Background

Denmac is proposing to establish a mixed-use development at 2-26 Hotz Road, Logan Village (the Subject Site). The proposed development includes a service station, two fast food restaurants and a childcare centre. Pre-commitments have been made by two leading operators and a childcare operator.

The Subject Site has extensive frontage, visibility and access from Waterford Tamborine Road (State Route 95). Waterford Tamborine Road is a major north-south traffic route which extends from urban areas of Brisbane to the north through to Logan Village, Yarrabilba and Tamborine in the south. Waterford Tamborine Road is currently being upgraded which will significantly improve accessibility through the area.

Report Objective

To assess the economic need and implications from the development of a service station, two fast food outlets, and a childcare centre at 2-26 Hotz Rd, Logan Village.

Report Structure

This report contains the following chapters:

- Chapter 1: Project Context and Description
- Chapter 2: Catchment Analysis
- Chapter 3: Service Station Economic Needs Assessment
- Chapter 4: Fast Food Restaurant Economic Needs Assessment
- Chapter 5: Childcare Economic Needs Assessment
- Chapter 6: Conclusion

1 Project Context and Description

The context for proposed development is identified in this Chapter, including an overview of the Subject Site, the proposed development, the regional context and the planning context.

1.1 Subject Site

The Subject Site is located at 2-26 Hotz Road, Logan Village. Approximately 2ha in size, the Subject Site is in the Rural Residential of the Logan Planning Scheme 2015.

Located at the southern side of the intersection of Hotz Road and Waterford Tamborine Road, the Subject Site offers a high degree of accessibility and exposure residents of the surrounding region as part of their day-to-day travel patterns.

Waterford Tamborine Road (State Route 95) is a major north-south arterial road which was upgraded in 2018, including widening to 4 lanes from Hotz Road to Anzac Avenue in the north.

The section of Waterford Tamborine Road between Anzac Avenue to North Street is now being upgraded. In total, over \$50 million has been invested in Waterford Tamborine Road over recent years, including funding from Economic Development Queensland.

Hotz Road is an east-west road link which provides convenient access to the Subject Site from the rural residential areas to the west. Extending west from the Subject Site, Hotz Road then runs south to link through to Camp Cable Road, which provides access to Jimboomba further west.

According to traffic count information sourced from the Queensland Government's Open Data Portal, an average of 21,900 vehicles travelled along Waterford Tamborine Road each day in 2020 (between Anzac Avenue and Stockleigh Road). The figure is up from an average of 20,430 vehicles per day in 2019, and 19,500 vehicles per day in 2018 notwithstanding the impacts of the COVID-19 pandemic on travel patterns from February 2020.

Directly north of the Subject Site on the northern side of Hotz Road is a small residential estate centred around Gayle Court. The estate includes approximately 19 homes.

Opposite the site on the eastern side of Waterford – Tamborine Road is Logan Village Waste and Recycling Facility, the Logan Village Fire Station and the Logan Village Cemetery.

The location of the Subject Site is shown in Figure 1.1.

Figure 1.1: Subject Site



Source: Nearmap; Ethos Urban

1.2 Proposed Development

The proposed mixed-use development at the Subject Site is as follows:

- A service station is to be provided on the eastern part of the site with direct frontage to Waterford Tamborine Road. The service station and a fast food tenancy includes a total of 450 sq.m GFA, with a fuel retail component (240 sq.m) and an adjoining food and drink (fast food) outlet of 210 sq.m.

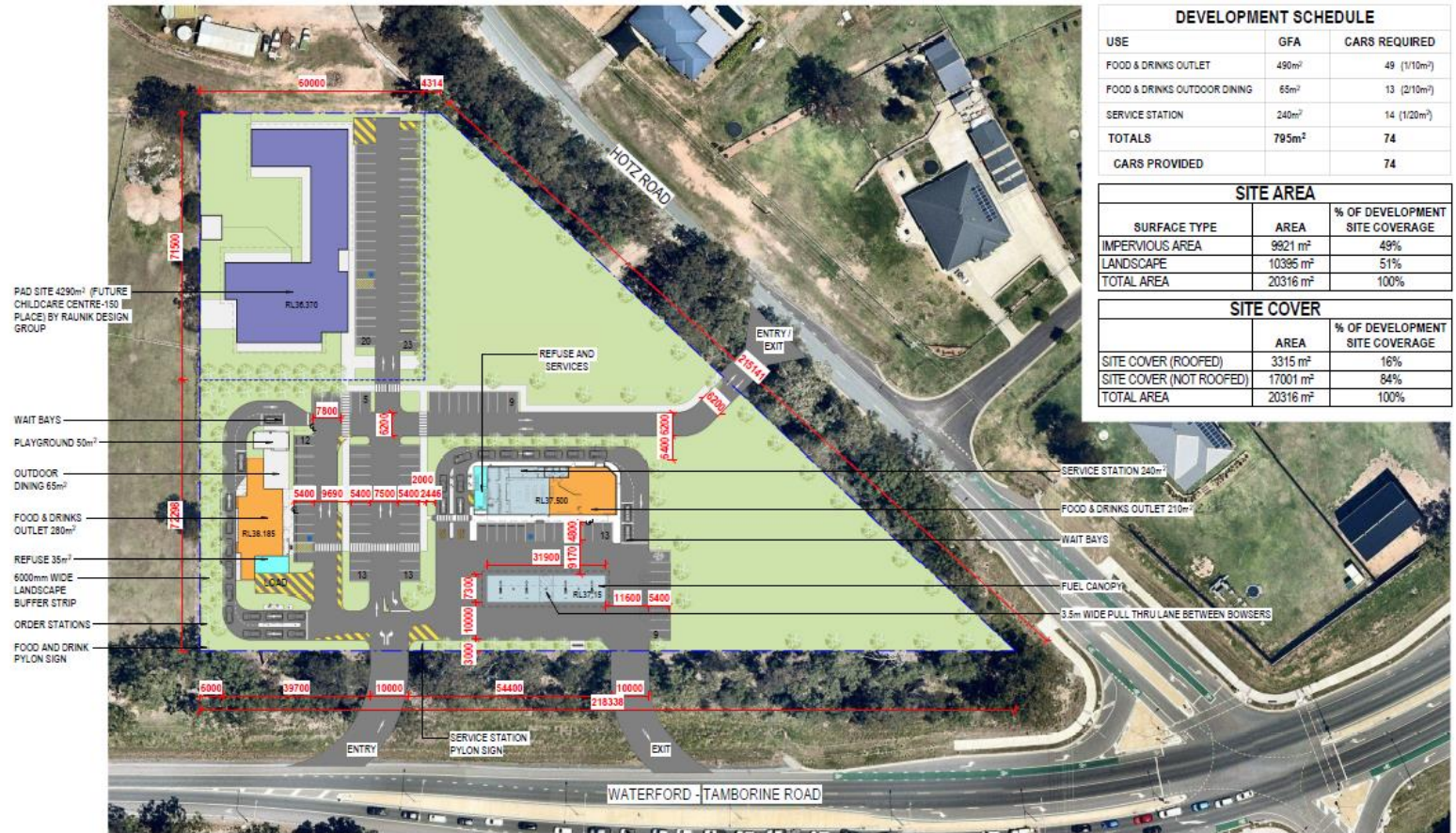
The applicant advises that the overall tenancy of 450 sq.m has a pre-commitment from a fuel retailer who operates more than 500 service station sites across Australia. It is expected that the fuel retailer will sub-lease the fast food component of the service station tenancy.

- A fast food restaurant is proposed south of the service station, also with direct frontage to Waterford Tamborine Road. The fast food outlet includes 280 sq.m GFA of indoor space, as well as an outdoor dining area of 65 sq.m and a 50 sq.m playground. The applicant advises that the tenancy has a pre-commitment from a leading national operator.
- A childcare centre is proposed at the western part of the site close to Hotz Road. The childcare centre is planned to include nine rooms that are to accommodate between 12 and 22 children each as well as three separate outdoor play areas. The total capacity of the centre is for 150 children and 28 full time staff. A total of 43 car parking spaces are to be provided. The applicant advises that the tenancy has a pre-commitment from a credible childcare operator already operating facilities in the wider region.

The proposed uses are integrated on the Subject Site and share ingress and egress points from Waterford Tamborine Road and Hotz Road, although each use will provide its own carparking.

The proposed development plan is shown in Figure 1.2.

Figure 1.2: Indicative Development Plan

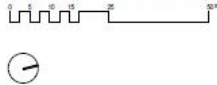


DEVELOPMENT SCHEDULE		
USE	GFA	CARS REQUIRED
FOOD & DRINKS OUTLET	490m ²	49 (1/10m ²)
FOOD & DRINKS OUTDOOR DINING	65m ²	13 (2/10m ²)
SERVICE STATION	240m ²	14 (1/20m ²)
TOTALS	795m²	74
CARS PROVIDED		74

SITE AREA		
SURFACE TYPE	AREA	% OF DEVELOPMENT SITE COVERAGE
IMPERVIOUS AREA	9921 m ²	49%
LANDSCAPE	10395 m ²	51%
TOTAL AREA	20316 m²	100%

SITE COVER		
	AREA	% OF DEVELOPMENT SITE COVERAGE
SITE COVER (ROOFED)	3315 m ²	16%
SITE COVER (NOT ROOFED)	17001 m ²	84%
TOTAL AREA	20316 m²	100%

DEVELOPMENT APPLICATION



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1.3 Regional Context

Logan Village is located approximately 45 km south of the Brisbane CBD. Access to the local area from inner Brisbane is provided via the Pacific Highway (M3) which links Brisbane with the Gold Coast.

Logan Village is a developing area of southern Brisbane located within the Logan City Council. Within the township of Logan Village, the Logan Village Centre is located at the intersection of Waterford Tamborine Road and North Road and is anchored by a Woolworths supermarket. Opposite the Logan Village Centre is the Logan Village industrial area.

Considerable residential development is occurring in the suburb with new residential estates driving population growth. Some of the larger estates include the recently completed My Home and the River estate (263 lots), which covers some 45 hectares located on the western side of Waterford Tamborine Road. To the immediate west of this estate is the River Oaks Estate by QM Properties (130 lots) which commenced development in 2015.

Yarrabilba is a major masterplanned community located to the south of Logan Village. It is one of two Priority Development Areas identified by the Queensland Government within the Logan City Council area, the other being Greater Flagstone. Yarrabilba covers over 2,000 hectares and is planned to provide some 17,000 – 20,000 homes (accommodating 45,000 – 50,000 residents) at completion by around 2040.

The northern part of Yarrabilba is being developed by Lendlease and construction commenced in 2014. In addition to a significant residential component, Yarrabilba contains numerous schools, parks, commercial uses and community facilities, while a range of further commercial and mixed-business facilities are planned.

The Yarrabilba Local Town Centre, which is located at the western edge of the estate near Waterford Tamborine Road is now well-established. The centre contains Coles and IGA supermarkets together with a range of retail shops and other services.

A Major Town Centre is planned to be centrally located in Yarrabilba, and is expected to be developed in the medium term once further development occurs in the southern part of the growth area.

1.4 Economic Context

The City of Logan is located in southern Brisbane and encompasses established urban areas, greenfield growth areas as well as low density residential areas. Some of the key economic measures of the City of Logan are as follows:

- **Population Growth:** According to the ABS, the population of the City of Logan was approximately 341,985 persons at June 2020, having increased by an average of +6,870 residents per annum from 2016. This represents an average annual growth rate of 2.1%, compared with 1.7% per annum for Queensland over the same period. The Queensland Government's population projections (2018 edition), outline that the population of the City of Logan is to reach approximately 500,000 residents by 2036, reflecting average growth of 2.4% or +10,000 residents per annum over the forecast period.
- **Employment growth:** According to the National Institute of Economic and industry Research (NIEIR) a total of 113,947 jobs were located in the City of Logan in the year ended June 2020. This was an increase of +10,128 jobs since 2016. The largest employing industries are Construction (19,060 jobs), Health Care & Social Assistance (14,924 jobs), and Retail Trade (14,106 jobs). Economy.id (engaged by the City of Logan) forecasts that the number of jobs

will increase to 127,488 by 2024, with the impact to the local economy at 2024 from COVID-19 predicted to be relatively low at -2.8% (compared with an estimated -10% impact for Greater Brisbane).

- **Unemployment:** According to data sourced from the Federal Government's Labour Market Information Portal, the unemployment rate for the City of Logan was 8.8% as at March 2021, up from 6.4% as at June 2016. This compares with 6.7% for Australia and 7.5% for Greater Brisbane as at March 2021.

1.5 Strategic Planning Context

The Logan Planning Scheme 2015 (the Scheme), of which Version 8 became effective in November 2020, was prepared to assist Council with managing population growth and to provide a framework for managing development in the municipality.

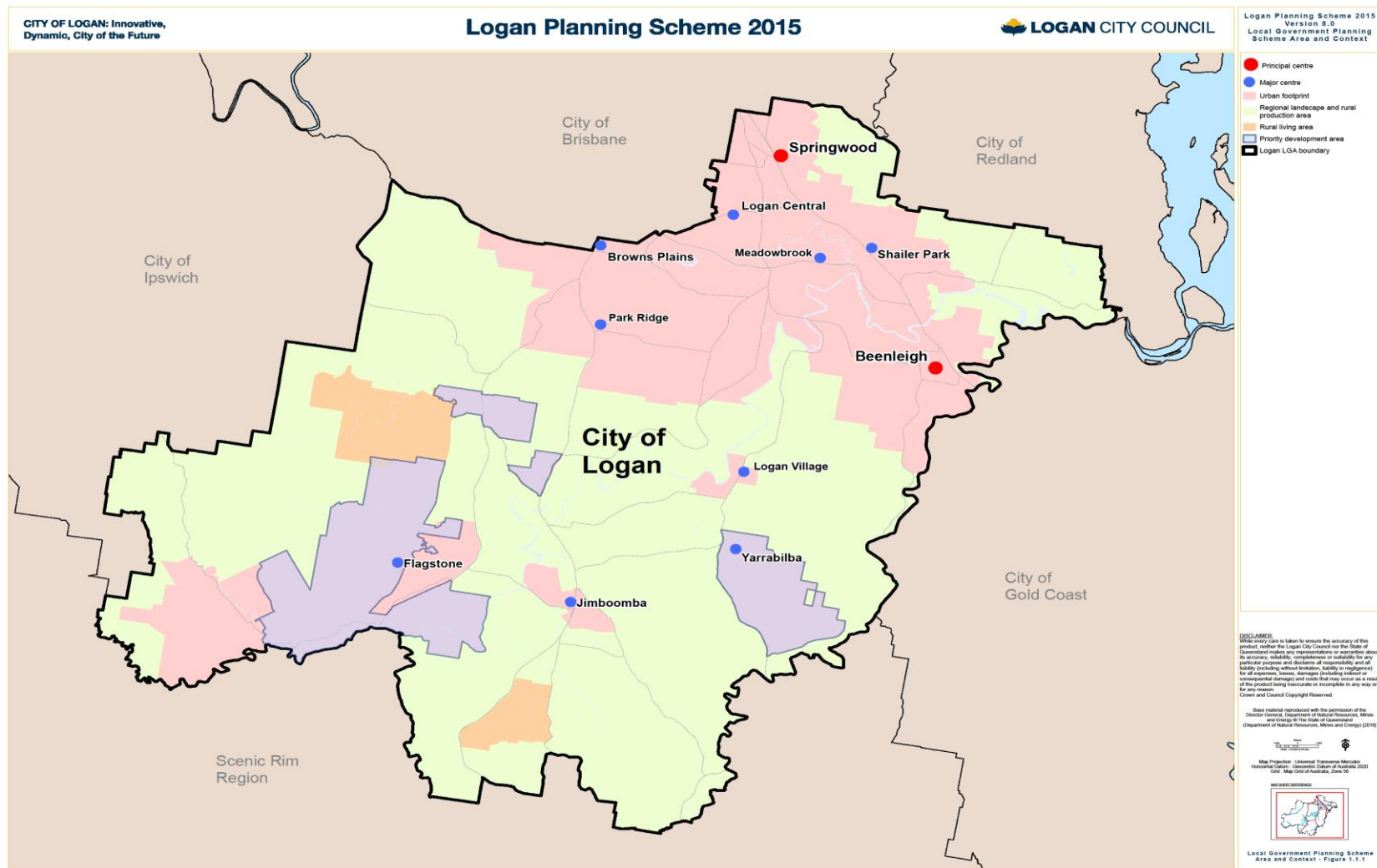
Part 3 of the Scheme outlines the Strategic Framework. The Strategic Framework sets the policy direction for the planning scheme and forms the basis for ensuring development in the municipality is appropriate. It is noted that the Scheme does not apply to the Priority Development Areas such as Yarrabilba and Flagstone, with development in those areas managed by Economic Development Queensland.

Under Schedules, SC6.2.2 sets out *Planning scheme policy 2 - Economic need and impact assessment*. It states that the purpose of the planning scheme policy is to assist with the implementation of the Scheme by specifying the information requirements for the preparation and submission of an economic need and impact assessment report. It states this following under Part 2 (2.1.1):

1. *"The purpose of the economic need and impact assessment report is to:*
 - a. *demonstrate that there is community, economic and planning need for the development;*
 - b. *demonstrate that the development is of an appropriate size;*
 - c. *identify and address the economic impacts associated with the development and the effects on existing and designated centres;*
 - d. *demonstrate that there are no other sites available in a designated centre or sequentially closer to a designated centre that could accommodate the proposed development."*

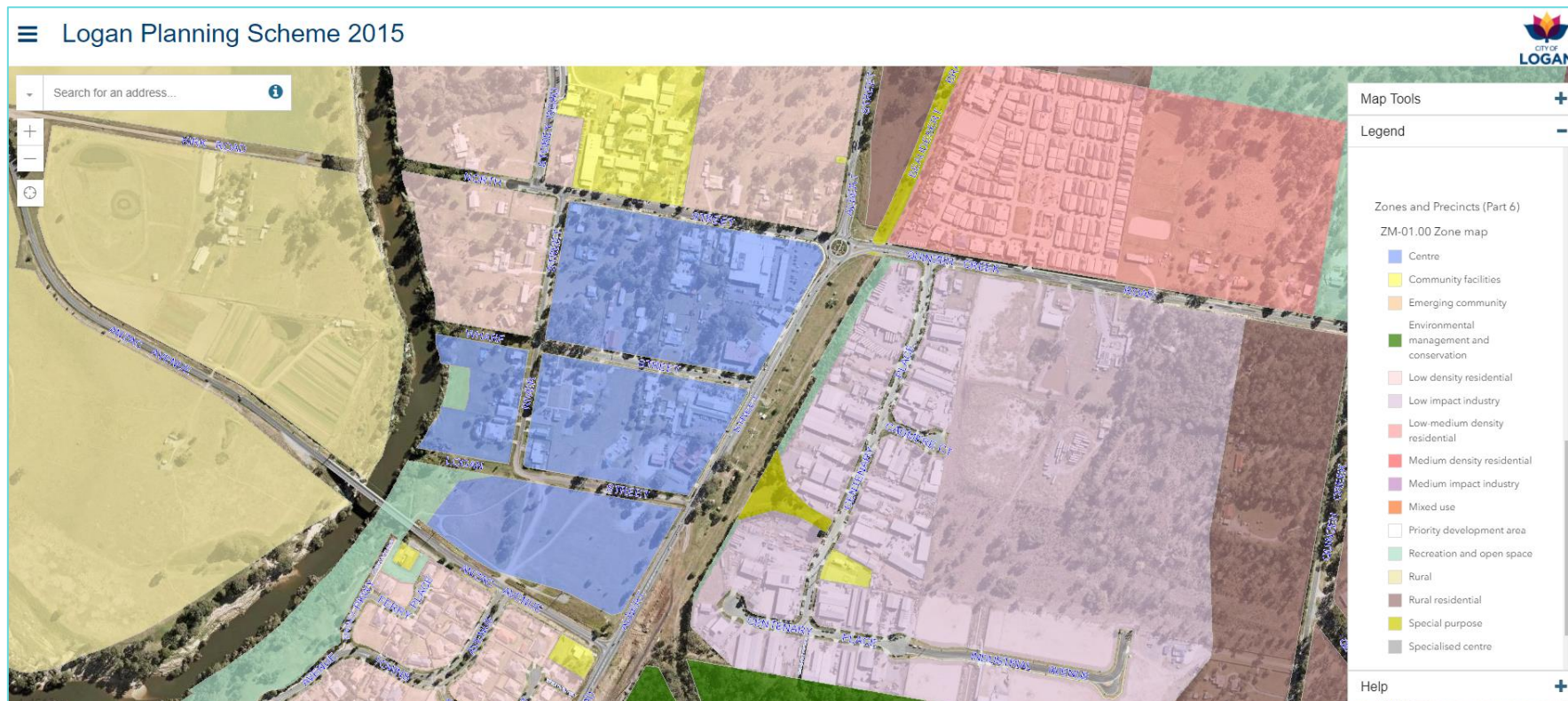
The following figures are sourced from the Scheme. Land uses and the location of key centres is shown in Figure 1.4, while Figure 1.5 shows the extent of the designated Logan Village Centre.

Figure 1.4: Logan Planning Scheme - Land Uses and Key Centres



Source: Logan Village Planning Scheme

Figure 1.5: Logan Planning Scheme – Logan Village



Source: Logan Village Planning Scheme

2 Catchment Analysis

This Chapter provides analysis of the Study Area or geographic catchment relevant for economic analysis of the range of uses planned for the Subject Site.

2.1 Study Area Definition

The extent of a Study Area or catchment for any facility is shaped by a number of factors such as the following:

- The relative attractiveness of the facility in question, including its scale, convenience, quality and composition, including as compared with alternative facilities.
- The surrounding competitive context, particularly the location, scale and quality of competing facilities.
- The available road network and public transport services and how they support access to the site in question.
- Significant physical barriers which can act to delineate the boundaries of a study area.

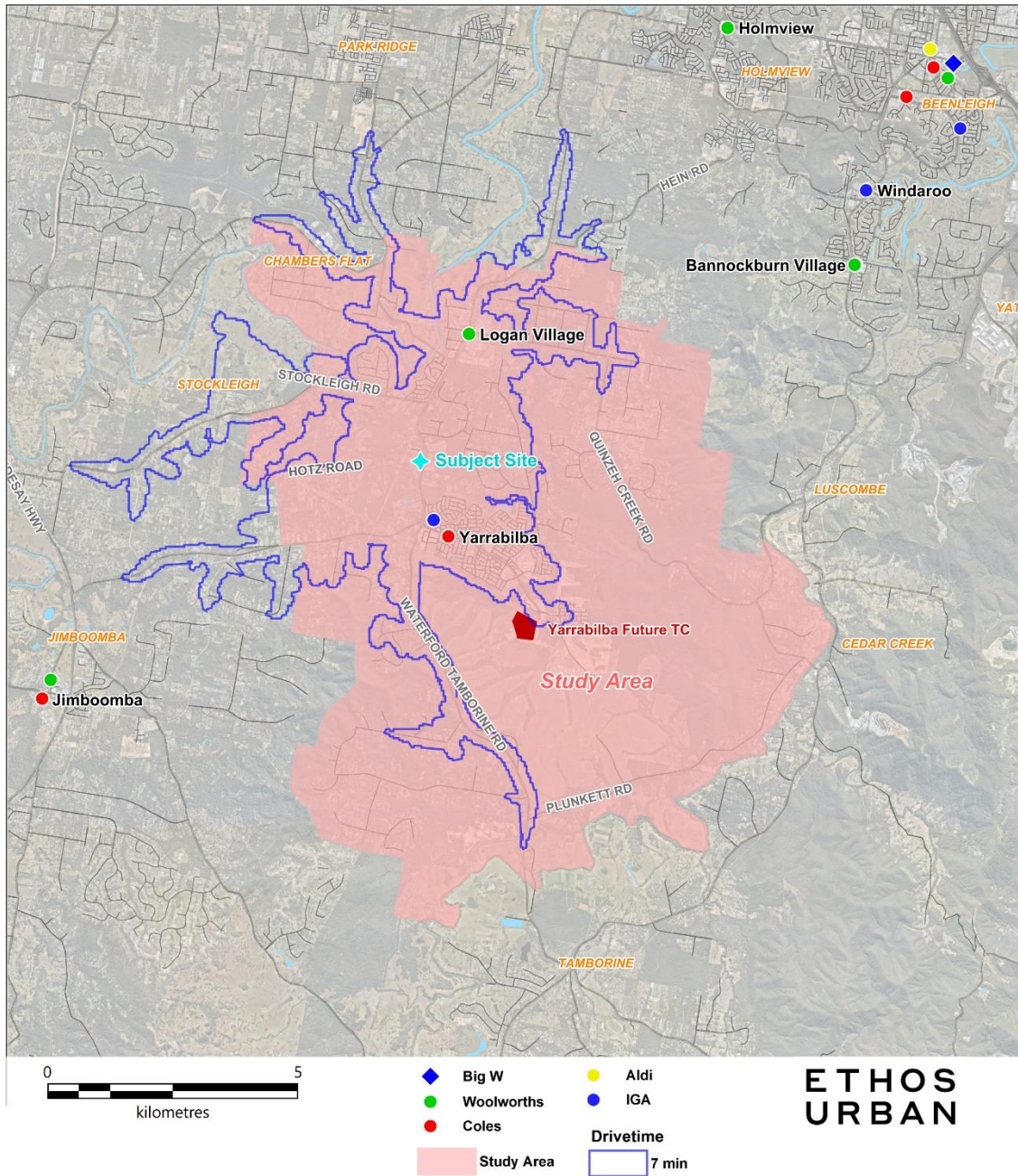
The extent of the Study Area for the proposed development specifically reflects the following:

- The Subject Site is located on, and has extensive frontage to, Waterford Tamborine Road, a major north-south traffic route through the area. In particular, Waterford Tamborine Road is one of the key throughfares linking Yarrabilba to the south with the urban area of Brisbane to the north. The Subject Site is very convenient to residents of both Logan Village and Yarrabilba, as well as others using Waterford Tamborine Road.
- The proposed uses at the Subject Site, a service station, two fast food outlets and a childcare centre, typically serve relatively wide catchments that overlap with that served by other comparable uses. In particular, the following points are noted:
 - Most drivers visit numerous service stations depending on a range of considerations such as the brand, loyalty programs, price of fuel, convenience and immediate need.
 - Patrons of fast food outlets are often brand sensitive and regularly seek out a particular chain or food style. The extent of the catchment for major national brand fast food outlets can be heavily influenced by the locations of other outlets of the same brand.
 - Parents choose a preferred childcare centre for a variety of reasons including convenience to place of residence or place of work, price, programs offered and availability. In general, parents would consider numerous different childcare centres in an area for their childcare needs before choosing a preferred facility – or one with spaces available at preferred days/times.

In effect, the proposed uses at the Subject Site are of a nature where the contemporary expectation of consumers is for a mixture of choice and convenience, rather than reliance on one or two local operators.

For the purposes of this assessment, one Study Area has been defined across all the proposed uses at the Subject Site. While the various uses may have slightly different usage patterns, for simplicity and consistency the same Study Area has been defined. The Study Area is considered to be the most relevant geographic area for assessing the economic need for the proposed uses in combination at the Subject Site.

Figure 2.1: Study Area



The Study Area is not divided further into individual sectors given the nature of the uses proposed, and that all residents can readily access the Subject Site in a timely manner. Over 70% of residents within the Study Area can access the Subject Site within a 7-minute drive.

The defined Study Area is shown in the previous Figure 2.1 and covers the suburbs of Logan Village, Yarrabilba, and the northern parts of Cedar Creek and Tamborine. The area covers parts of the Logan Village, Chambers Flat - Logan Reserve and Jimboomba Statistical Areas 2 (SA2), as defined by the Australian Bureau of Statistics (ABS).

2.2 Study Area Population Trends and Forecasts

Historic population levels for the Study Area have been estimated by using ABS estimated resident population (ERP) data, which is considered the most accurate and up-to-date population data available in Australia.

Population forecasts to 2036 use a range of sources including ABS New Dwellings Approval data; Queensland Statistician's Office data published by the State Government and released in December 2018; nearmap images showing recent housing development in the area; and other investigations of residential development undertaken by this office.

The historic, current and projected population figures for the Study Area from 2011 to 2036 are shown in Table 2.1. In mid-2021, the Study Area population is estimated at approximately 18,890 persons, having increased from 6,200 persons in 2011, a tripling of the population over this period. This equates to an average annual growth rate of +11.9% per annum, or +940 persons per annum over the period from 2011 to 2016, and an average annual growth rate of +11.6% per annum, or +1,600 persons per annum over the period from 2016 to 2021.

The population of the Study Area is forecast to continue to increase rapidly over the next 10 years and beyond, with the population forecast to reach 33,390 persons by 2031, an increase of +14,500 persons on 2021 levels at an average annual rate of +5.9%. Further population growth is expected to result in the Study Area population approaching 40,000 residents by 2036.

This rapid population growth is being driven by residential development within numerous estates. That includes in Logan Village as well as the ongoing development of Yarrabilba, which as stated previously has capacity for a total of 17,000 – 20,000 homes, accommodating some 45,000 – 50,000 residents.

Table 2.1: Study Area Population Estimates and Projections, 2011-2036 (as at June)

	2011	2016	2021	2026	2031	2036
<u>Study Area</u>						
Population (no.)	6,200	10,890	18,890	26,890	33,390	39,740
Annual Growth (no.)		+940	+1,600	+1,600	+1,300	+1,270
Annual Growth (%)		11.9%	11.6%	7.3%	4.4%	3.5%

Source: Ethos Urban; ABS; Nearmap; Queensland Government Statistician's Office

These projections make an allowance for COVID-19 impacts, noting the apparent relative resilience of population growth in Queensland and in particular the residential growth areas of Brisbane relative to the balance of Australia.

2.3 Building Approvals

As outlined in the analysis of population trends and forecasts presented above, the Study Area is a key residential growth area in southern Brisbane. This is further evidenced by recent trends in residential building approvals.

Over the five years from 2015/16 to 2019/20, the study area has averaged 483 new dwelling building approvals every year, as sourced from the ABS.

This substantial and continued growth in new dwellings will drive demand for additional services for the growing community, including facilities such as service stations, fast food restaurants and childcare centres.

2.4 Socio-Economic Characteristics

The socio-economic profile of residents in the study area compared with Greater Brisbane is summarised in Table 2.2. Greater Brisbane is an area defined by the ABS and covers the Local Government Areas (LGAs) of Brisbane City, Moreton Bay, Ipswich City, Redland City, Logan City, Somerset and parts of Scenic Rim and Lockyer Valley.

The main points drawn from the 2016 ABS Census analysis are as follows:

- **Higher incomes.** Household incomes in Study Area are above the metropolitan Brisbane average on both a per capita and household basis.
- **Younger age profile.** The Study Area has a much younger age profile compared with Brisbane, with a higher proportion of the population aged under 35 years. In particular, 8.9% of the Study Area population is aged 4 years or younger, compared with 6.5% for Brisbane.
- **Predominantly Australian-born.** The majority of study area residents are Australian-born, accounting for 82.4% of Study Area residents.
- **Family-orientated household composition.** Family households comprise 83.5% of all households in the Study Area, compared with 72.8% for metropolitan Brisbane. Furthermore, the Study Area contains a much higher share of residents living in a family household with children (41.1%) compared with Brisbane (33.5%), which reflects the high number of young families in the area.
- **Car ownership.** Virtually all households in the Study Area have at least one car. A total of 76.7% of households in the study area own two or more cars, which is well above the average for Brisbane (58.1%).
- **Occupation.** The occupations of Study Area residents is heavily oriented towards trade/labourer professions. A much higher than average share of Technicians & Trades Workers, Machinery Operators & Drivers and Labourers live in in the Study Area compared with Greater Brisbane.

Table 2.2: Study Area and Greater Brisbane, Socio-Economic Characteristics, 2016

Category	Study Area	Greater Brisbane
<u>Income</u>		
Median individual income (annual)	\$37,840	\$36,640
Variation from Greater Brisbane median	3.3%	na
% of persons (15 years or older) earning \$1,000pw or more	33.9%	35.1%
<u>Household Income</u>		
Median household income (annual)	\$87,720	\$82,220
Variation from Greater Brisbane median	6.7%	na
% of Households earning \$2,500pw or more	22.8%	25.7%
<u>Age Structure</u>		
0-4 years	8.9%	6.5%
5-19 years	22.0%	19.5%
20-34 years	23.4%	22.6%
35-64 years	36.5%	38.0%
65 years and older	9.4%	13.4%
Median Age (years)	31.6	35.9
<u>Country of Birth</u>		
Australia	82.4%	73.4%
Other Major English Speaking Countries	12.4%	11.8%
Other Overseas Born	5.2%	14.7%
% speak English only at home	94.2%	82.9%
<u>Household Composition</u>		
<i>Couple family with no children</i>	29.1%	26.3%
<i>Couple family with children</i>	41.1%	33.5%
Couple family - Total	70.2%	59.8%
One parent family	12.7%	11.7%
Other families	0.6%	1.2%
Family Households - Total	83.5%	72.8%
Lone person household	14.0%	22.0%
Group Household	2.5%	5.2%
<u>Dwelling Structure (Occupied Private Dwellings)</u>		
Separate house	95.8%	76.8%
Semi-detached, row or terrace house, townhouse etc.	4.2%	10.0%
Unit / other dwelling	0.0%	13.2%
Average household size	3.0	2.7
<u>Tenure Type (Occupied Private Dwellings)</u>		
Owned outright	21.2%	27.2%
Owned with a mortgage	51.3%	36.7%
Rented	26.9%	35.5%
Other tenure type	0.5%	0.7%
<u>Car Ownership per Dwelling</u>		
None	0.9%	6.6%
One	22.5%	35.3%
Two	42.7%	38.5%
Three or more	34.0%	19.6%
Avg number motor vehicles per dwelling	2.3	1.8
<u>Occupation</u>		
Managers	10.5%	11.9%
Professionals	12.5%	23.0%
Technicians and trades workers	19.1%	13.0%
Community and personal service workers	9.7%	10.9%
Clerical and administrative workers	15.7%	14.8%
Sales workers	9.9%	9.3%
Machinery operators and drivers	10.0%	6.2%
Labourers	11.2%	9.5%

Source: Ethos Urban; ABS, Census of Housing and Population, 2016

2.5 Travel to Work Patterns

Understanding the commuting patterns of Study Area residents is important when considering the proposed uses at the Subject Site, as many people may choose to utilise the facilities during their commute to and from work.

Place of Work (POW) data from the 2016 ABS Census provides insights into commuting patterns. As stated previously, the Study Area does not align with SA2 boundaries, although it falls within the SA2s of Logan Village, Chambers Flat - Logan Reserve and Jimboomba.

The ABS POW data details that approximately 63% of residents living within the relevant SA2s work within Greater Brisbane (although outside the relevant SA2s). Approximately 20% of employed residents work within the relevant SA2s, and the balance of 17% work elsewhere.

The POW of employed residents in the relevant SAs as at 2016 is illustrated in Figure 2.2 and shows that many travel to the urban area of Brisbane for work, although some also travel south. It is likely that a significant proportion of residents within Yarrabilba travel to the urban area of Brisbane for work, with many passing the Subject Site each day.

On this basis, the proposed uses are expected to serve a share of persons travelling internally within the study area for work, and particularly commuters travelling to the urban areas of Brisbane from Yarrabilba.

Table 2.3 Logan Village, Chambers Flat – Logan Reserve, and Jimboomba SA2 Residents Place of Work (POW), 2016

Place of Work	Employed Residents
Relevant SA2s	20%
Balance of Greater Brisbane	63%
Outside Greater Brisbane	17%
Total	100%

Source: Ethos Urban using Mapinfo; ABS POW Data

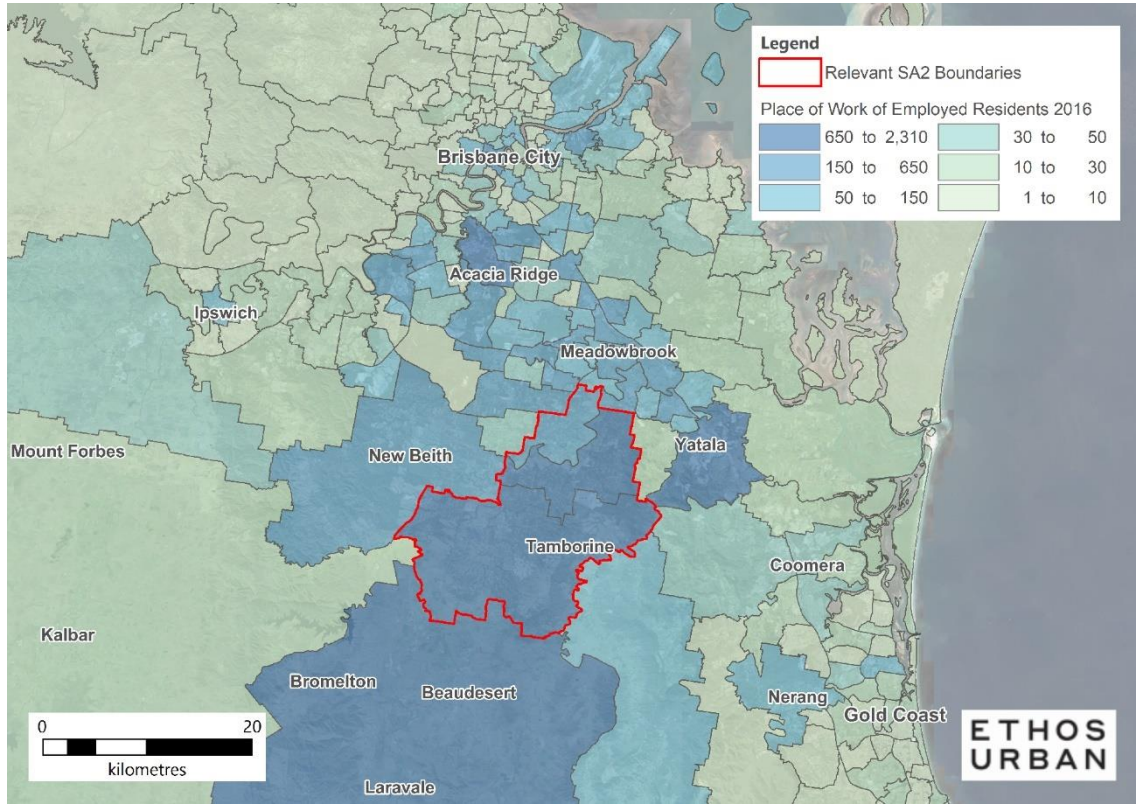
The Method of Travel for employed residents in the study area is shown in Table 2.4 and is sourced from the ABS 2016 Census. A significant share (84.9%) of residents in the area commute to work by car, as either a driver or passenger, compared with the Greater Brisbane average of 73.3%.

Table 2.4 Method of Travel to Work, Study Area Employed Residents, 2016

	Study Area	Greater Brisbane
Car, as driver	80.7%	67.8%
Car, as passenger	4.2%	5.5%
Car and other method	2.5%	3.0%
Truck	2.7%	1.0%
Motorcycle	0.8%	1.1%
Train	0.6%	4.0%
Walked	1.1%	3.2%
Bus	0.4%	5.1%
Other	7.1%	9.2%
Total	100.0%	100.0%

Source: ABS Census of Population and Housing 2016; Ethos Urban

Figure 2.2: Logan Village, Chambers Flat – Logan Reserve, and Jimboomba SA2 Place of Work (POW) of Employed Residents, 2016



Source: Ethos Urban using Mapinfo; ABS POW Data

3 Service Station Economic Needs Assessment

This Chapter provides an assessment of the economic need and implications of a service station development at the Subject Site including an overview of the competitive environment and the key demand drivers.

3.1 National Service Station Trends Overview

The following are some high-level observations in relation to the national service station industry:

- **In recent years growth has occurred in the number of vehicles and kilometres travelled throughout Australia, and this growth is expected to continue for the foreseeable future.** The size of the Australian motor vehicle fleet and the number of kilometres travelled are two key indicators of demand for fuel retailing and for service stations.
- **Motor vehicle use in Queensland is proportionally high compared with the national average** in terms of the number of motor vehicles and kilometres travelled. This reflects, in part, the large geographic area of Queensland relative to other States and more dispersed concentration of population.
- **Fuel consumption in Australia continues to increase, although a trend towards diesel-powered vehicles has driven stronger growth in diesel sales compared to petrol sales.** Although continued growth in electric- and hybrid-powered cars in the future will impact fuel sales, these vehicles currently represent only a very small proportion of the market. It is expected that traditional diesel and petrol-powered cars will continue to comprise the majority of vehicles on the road for a significant number of years. Nevertheless, the industry is already adjusting to cater for these new modes of transport such as introducing charging stations.
- **A consolidation of the number of service station throughout Australia has been one of the major trends impacting the industry in recent decades, although in recent years this trend has reversed.** It is understood the number of service stations in Australia in the 1970s was in the order of 20,000 and this then declined to approximately 6,400 service stations in the mid-2000s. Since that time, growth in the number of service stations has occurred to approximately 7,300 outlets today. This trend has driven an increased the need for service stations in highly accessible and visible locations.
- **Profit margins on fuel sales are low, with service stations earning only a few cents of profit per litre of fuel sales.** A large proportion of profit for service stations is derived from non-fuel sales associated with aligned convenience retailing (e.g. food and drinks), highlighting the importance of convenience retailing associated with fuel sale outlets.
- **While the fuel retailing industry has been impacted by Covid-19, demand for fuel is expected to return to pre-Covid-19 levels** once travel restrictions ease.
- **Service Stations remain a critical component** of the private and commercial transport sector and an important contributor to the lifestyle requirements of an overwhelming proportion of the community. Likewise, the transport industry relies on an appropriately located network of service stations to meet their own needs, including light commercial vehicles who are increasingly an important part of the 'last mile' delivery requirements of online sales.
- **The ACCC identifies that the level of competition** in an area is a key determinant of local fuel prices, noting that petrol represents significant component of the typical household budget. As such, ensuring appropriate levels of competition between service station operators in an area is an important component of economic and community well-being.

3.2 Key Locational Criteria

The key locational criteria for service stations are as follows:

- **Exposure to passing traffic.** Service stations rely on direct exposure to high levels of passing vehicular traffic. The subject site has direct frontage to Waterford Tamborine Road (Route 95), a major mostly dual carriageway through the study area that links the urban areas of Brisbane to the north with Yarrabilba and locations further south including Tamborine.
- **Site size.** A service station requires sufficient land to accommodate a wide range of uses (including potentially complementary convenience shop, petrol canopy etc.), as well as sufficient space to allow for the circulation of vehicles including heavy vehicles and delivery trucks. The subject site has a total area of 2ha and can accommodate all relevant site requirements.
- **Catchment.** The demand for a service station is partly determined by the geographic catchment that is served by the relevant location, including surrounding residents. For the subject site, this will largely include residents in the surrounding area who can conveniently access the subject site.
- **Visibility and Accessibility.** A key locational criterion for a service station is the ability to have a strong visual presence for passing traffic, and the ability for customers to access and exit quickly, safely and efficiently. For this reason, prominent corner locations are often a preferred location, with the Subject Site providing this attribute. The plan for direct ingress and egress from Waterford Tamborine Road, ensuring the proposed service station will have excellent accessibility.

3.3 Supply of Service Stations

Five service stations are currently located within the Study Area, with further service stations located in the broader surrounding region.

The five Study Area service stations comprise:

- A Shell/Coles Express located to the north of the Subject Site on the eastern side of Waterford-Tamborine Road. Recently developed in early 2021, this service station provides a Coles Express convenience store. The site is zoned Rural Residential.
- Ampol Yarrabilba, which is located within the Yarrabilba Local Town Centre and was recently rebranded from Caltex. The outlet includes a Foodary convenience store.
- A 7-Eleven service station that recently opened at 2-30 Logan Street, just south of the Logan Village Centre. A KFC outlet is located adjacent to the 7-Eleven, while the overall site development is planned to also include a McDonald's food outlet as well as a 121 place childcare centre.
- A small BP service station located within Logan Village Centre on the western side of Albert Street (Waterford Tamborine Road). The outlet is located immediately south of the Woolworths Logan Village supermarket.
- A recently opened Ampol service station at the intersection of Yarrabilba Drive and Mill Street in Yarrabilba. The development provides a 192 sq.m Foodary convenience store and will include a 307 sq.m fast food outlet with a drive-thru facility.

A summary of the service stations located in the Study Area is provided in Tables 3.1 and the location of these outlets is shown Figure 3.1.

A Google Street View image of each service station is provided on the following page (except for service stations which have recently opened).

Table 3.1: Existing Service Stations within Study Area

Service Station	Address	Distance by road from Subject Site	Additional Comments
Shell/Coles Express Logan Village	1332 Waterford Tamborine Rd	1.1 km	Coles Express convenience store
Ampol Yarrabilba	28 Yarrabilba Dr	1.8 km	Located within Yarrabilba Town Centre
7-Eleven Logan Village	2-30 Logan Street	2.3 km	Recently opened
BP Logan Village	111-113 Albert St	2.7 km	Located within Logan Village Local Centre
Ampol Yarrabilba	Yarrabilba Drive & Mill Street	4.4 km	Recently opened

Source: Ethos Urban

Shell/Coles Express Logan Village



Source: Google Street View

Ampol Yarrabilba



Source: Google Street View

BP Logan Village

Source: Google Street View

In addition to the five service stations in the Study Area, service stations are located at Tamborine to the south, MacLean to the west and Jimboomba to the south-west, as summarised in Table 3.2 and shown in Figure 3.1.

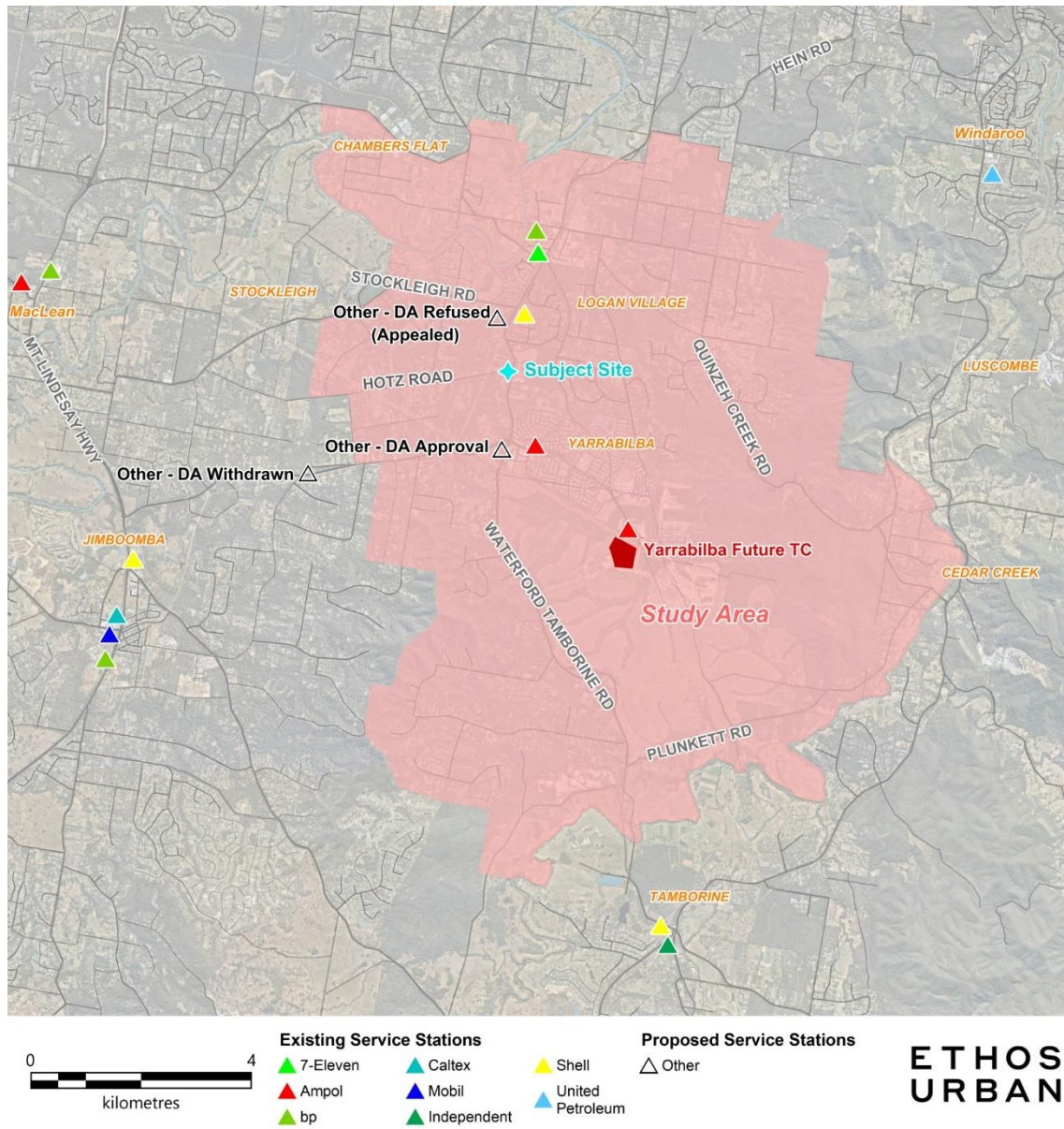
Service stations are also provided throughout the urban area of Brisbane to the north and east of the Subject Site.

Table 3.2: Service Stations Beyond Study Area

Service Station	Address	Distance by road from Subject Site
Jimboomba		
Shell Coles Express Jimboomba	2-4 Tamborine St	9.4 km
Caltex Woolworths (Ampol)	1 Honora St	10.6 km
Mobil Jimboomba	671 Cusack Ln	10.8 km
BP	73-77 Cerina Circuit	11.2 km
North MacLean		
BP	Mount Lindesay Hwy	12.3 km
Ampol Foodary North Maclean	918 Greenbank Rd	12.3 km
Tamborine		
Shell	2785 Waterford Tamborine Rd	11.4 km
Puma Tamborine	1-3 Leach Rd	11.7 km

Source: Ethos Urban

Figure 3.1: Established and Proposed Service Stations Within Study Area and Surrounds



Proposed Service Stations

The proposed service stations in the surrounding area are shown in Table 3.3.

Within the Study Area a convenience-oriented development has approval for a site located on the western side of Waterford Tamborine Road in close proximity to the Yarrabilba Local Town Centre. The development is proposed to include a service station, convenience store of 272 sq.m, a food & drink outlet of 182 sq.m and a car wash. Timing for the development is unknown.

A convenience facility is proposed at 1335-1371 Waterford Tamborine Road, Logan Village, a short distance south of Stockleigh Road. This development was planned to include a service station, a 220 sq.m convenience store and two restaurants with drive-thru facilities. The development application was refused and we understand an appeal is currently in process.

Table 3.3: Approved Service Station Developments

Approved Service Stations	Project Address	Distance by Road from Subject Site	Status
Within Study Area			
Waterford Tamborine Road Service Centre	1601-1621 Waterford Tamborine Rd, Logan Village	1.5 km	Development Approval
Beyond Study Area			
Mount Lindesay Highway Convenience Centre	6084 Mount Lindesay Hwy, Woodhill	20 km	Development Approval
Gates Road Service Station & Industrial Building	14 Commercial Circuit, Flagstone	33 km	Development Approval

Source: Ethos Urban; Cordell Connect

3.4 Provision of Service Stations

In 2021 approximately 1,599 service stations were operational throughout Queensland as sourced from the Queensland Government's Fuel Prices dataset (refer Table 3.4).

Table 3.4: Service Station Provision, June 2021

Region	No. of fuel stations*	Estimated 2021 Population	No. Residents per fuel station	No. fuel stations by 10,000 residents
Queensland	1,599	5,221,170	3,270	3.1
SEQ	828	3,666,660	4,430	2.3
Greater Brisbane**	548	2,512,320	4,590	2.2
Logan (C)	102	346,360	3,400	2.9
Ipswich (C)	64	234,440	3,660	2.7

*As at June 2021 for locations identified in previous 6-months

**For the above table, Greater Brisbane is defined as the LGAs of Brisbane, Logan, Ipswich, Redland and Moreton Bay

Source: ABS, Queensland Government Open Data Portal: Queensland Fuel Prices; Ethos Urban

The provision of service stations in Queensland is in the order of 3.1 service stations per 10,000 residents or one service station per 3,270 residents. This is a higher rate of provision than the national average of approximately one service station per 3,600 persons.

Within Greater Brisbane, the provision of service stations is lower at 2.2 service stations per 10,000 residents or one per 4,590 residents. The lower rate of provision in Greater Brisbane is generally consistent with guidance from the Australian Institute of Petroleum (AIP) which indicates that metropolitan service stations tend to serve a customer base of between 4,000 and 5,000 persons, noting that this is a general benchmark applied Australia-wide.

For the City of Logan, the provision of service stations is higher than for the balance of Greater Brisbane, at 2.9 service stations per 10,000 residents or one per 3,400 residents. This is similar to City of Ipswich, another outer suburban municipality, where the rate of provision is one service station per 3,660 persons.

Study Area

For the Study Area, the need and provision of service stations will be influenced by the very high rates of motor vehicle ownership of 0.76 vehicles per capita which is 13% higher than for Greater Brisbane overall (0.67 vehicles per capita).

Four service stations were operating in the Study Area at June 2021, reflecting a provision equivalent to one service station per 4,723 residents (see Table 3.5).

Table 3.5: Study Area Service Station Provision, June 2021

	No. Service Stations	Estimated 2021 Population	Estimated No. Residents per Service Station	No. Service Stations per 10,000 Residents
Study Area	4	18,890	4,723	2.1

Source: Ethos Urban

If the recently opened Ampol service station at Yarrabilba is included, a service station is operating in the Study Area for every 3,780 residents (based on the June 2021 estimated population).

The demand for new service stations in the Study Area will further increase with population growth.

By 2026, based on a Study Area population of 26,890 persons the provision of seven service stations would be at a rate marginally below the indicative AIP threshold of 4,000 persons per outlet. At 2031, based on a population of 33,390 Study Area residents, the expected demand would increase further to a total of at least eight service stations if this threshold is applied – noting that the AIP guidance is conservative relative to actual observed rates of service station provision in the City of Logan.

The nature of fuel retailing is more nuanced than simply applying population benchmarks. For example, people tend to buy fuel at a location when they need it, which may be close to home, work or any other location. The following sub-section, therefore, provides further analysis on the demand for service stations in the Study Area.

Nevertheless, the application of population provision benchmarks for this area does indicate that the Study Area will be under-represented by service stations without additional facilities given the population is forecast to grow so strongly. Having regard to this analysis, it is clear demand exists from the Study Area population for additional service stations.

In this case, accessibility and convenience is particularly important, including for people visiting the Study Area such as commercial vehicles, as well as people passing through the Study Area from locations such as Tamborine, Jimboomba etc as part of regional movement patterns.

Overall, the Subject Site presents an appropriate location for a service station given its prominent position on a major traffic route that will be accessible and regularly passed by motorists living in the Study Area, and to some extent non-Study Area residents also.

3.5 Forecast Fuel Demand

The ABS publishes information on motor vehicle use in Australia, with the most recent being the Survey of Motor Vehicle Use, Australia for the period ending June 2020. Using information from this publication, together with estimates on the number of vehicles in the Study Area, an estimate of the total fuel requirements of private motor vehicles in the Study Area can be calculated.

The estimated number of motor vehicles within the Study Area can be calculated using information from the 2016 ABS Census as well as projected population growth, as previously detailed in Chapter 2.

Assuming the average household size and the average number of motor vehicles per household remain constant over the forecast period, the total number of private motor vehicles in the Study Area is calculated to increase from 14,355 in 2021 to 30,200 in 2036 (refer Table 3.6).

The ABS published Survey of Motor Vehicle Use Australia, details that in the year ended June 2020 passenger vehicles in Queensland travelled an average of 11,100 km. This includes approximately four months where travel was impacted by COVID-19 related movement restrictions. On this basis, the ABS has released data across three four-month periods which allows the trends for the first eight months to be applied to the COVID-19 impacted final four months. On this basis, a normalised average of 12,600 km per passenger vehicle has been applied.

The same publication details that passenger vehicles in Queensland used an average of 11.5 litres of fuel per 100 km travelled during the year.

Therefore, on average passenger vehicles in Queensland use 1,449 litres of fuel each year. Applying this average fuel consumption to the Study Area, it is estimated that the total fuel consumption of passenger vehicles in the Study Area is 20.8 million litres in 2021.

An allowance has been made for some net escape spending of this private motor vehicle fuel spending given the outer urban location of the Subject Site and Study Area. However, it is also true that the net escape spending will be reduced by:

- Commercial vehicles which will also contribute to the demand for fuel at study area service stations, particularly for facilities located on Waterford Tamborine Road. A growing proportion of short 2-axle vehicles are commercial vehicles given the increasing popularity of online sales and the use of small commercial vehicles for the delivery of non-bulky items
- The regional travel patterns of residents living in locations such as Tamborine (approx. 4,400 residents) and Jimboomba (approx. 16,200 residents) who might pass through the Study Area as part of their own regional travel movements.

Electric cars will form a greater proportion of cars over time, however, at present the adoption of such vehicles in Australia is still relatively limited. To allow for the increase of electric cars, the analysis assumes that the average fuel consumption per passenger vehicle declines over the forecast period. It is noted, however, that service stations will also service the electric vehicle market to some degree, such as providing rapid charging facilities.

The volume of fuel sales per service station can vary considerably depending on the location and size of the facility. However, a mid-sized suburban service station typically achieves annual fuel sales in the order of 3ML to 4ML a year. This is also a reasonable expectation of average fuel sales for service stations in the Study Area.

As such, a total of seven service stations in the Study Area at 2026 has the potential to generate average fuel sales at the top end of this range, with eight outlets at this time generating average sales of 3.5ML per annum.

Table 3.6: Study Area Estimated Fuel Consumption, 2021 to 2036

	2021	2026	2031	2036
<u>Number vehicles</u>				
Resident population	18,890	26,890	33,390	39,740
Avg household size	3.0	3.0	3.0	3.0
Est. dwellings	6,286	8,949	11,112	13,225
Avg vehicles per households	2.3	2.3	2.3	2.3
Total est. passenger vehicles in study area	14,355	20,435	25,374	30,200
<u>Fuel consumption (passenger vehicles)</u>				
QLD average travel distance (km)	12,600	12,600	12,600	12,600
QLD average fuel consumption (L per 100 km)	11.5	11.4	11.2	11.1
Average fuel usage per vehicle (L)	1,449	1,431	1,413	1,396
Est. fuel consump'n passenger vehicles in study area (ML)	20.8	29.2	35.9	42.1
Net Escape Spending (@5%)	-1.0	-1.4	-1.7	-2.0
Total est. fuel consumption study area (ML)	19.8	27.8	34.2	40.1

Source: Ethos Urban; ABS Census 2016; ABS Survey of Motor Vehicle Use 2020

3.6 Economic and Community Implications

A range of economic and community benefits are likely to result from the proposed development of a service station at the Subject Site, including the following:

- Serve the increasing demand for facilities from population growth.** The Study Area is a key growth area in outer Brisbane, with the population forecast to increase from 18,890 persons in 2021 to approach 40,000 persons by 2036. This growth in population will contribute significantly to the increase in demand for service stations in highly accessible locations. The Subject Site is well exposed to passing traffic with convenient access. The ongoing upgrades to Waterford Tamborine Road will further improve accessibility to the Subject Site.
- Serve the demand for new service stations in the Study Area.** Currently five service stations operate in the Study Area. By 2031, the population of the Study Area is expected to increase this demand to up to nine service stations. The proposed service station would help serve this rapidly growing need.
- Put downward pressure on price and increase choice.** This is an important consideration as higher fuel prices can impact on disposable incomes and economic opportunity in a region. Importantly, the proposed development will introduce a new fuel retailer to the local market. This will provide more choice for surrounding residents, workers and passing trade, and will benefit the local community.
- Create job opportunities and investment.** The proposed development will attract private sector investment at a time when the national economy is recovering from the COVID-19 pandemic. A new service station at the Subject Site will also create direct ongoing jobs, while further temporary jobs will be created during the construction period. Fuel retailers support an average of seven direct jobs according to IBISWorld (Fuel Retailing in Australia, May 2020).

A new service station at the Subject Site may have some trading implication for existing service stations, although any potential impacts are expected to be minimal in the context of rapid market growth and the reasonable expectation of incumbent operators that new competition will emerge over time.

Given forecast growth in market demand to 2026 the proposed service station will serve an market gap that is not fully met by current approvals.

Further, the development will introduce a new fuel retailer to the market mitigates potential impacts on existing service stations to some degree. This reflects that some consumers will prefer the offer/service of new fuel retailer, and therefore the amount of fuel expenditure in the Study Area would increase if a new brand is provided.

Given the strong growth in fuel consumption by Study Area residents and the expected ongoing growth in vehicles travelling along Waterford Tamborine Road, the delivery of an appropriate range of fuel retailing outlets in a timely manner will ensure that economic and community need is met.

4 Fast Food Restaurant Economic Needs Assessment

The Chapter provides an assessment of the economic need and implications of two fast food outlets at the Subject Site based on the available market and supply of fast food outlets in the surrounding region.

4.1 Retail and Food Catering Spending

The following sub-section details the estimated spending for total retail for the Study Area compared with Greater Brisbane, as well as for key retail categories. Fast food outlets, as with all cafés, restaurants and takeaway food stores, serve part of the retail market referred to as food catering.

Estimates of retail spending by study area residents have been prepared with reference to the MarketInfo retail spending model. MarketInfo is a micro-simulation model which uses data from the ABS Household Expenditure Survey (HES), the ABS 2016 Census of Population and Housing, ABS Australian National Accounts, and other relevant sources.

Estimates of average per household retail spending in 2021 for study area residents are shown in Table 4.1, and are compared with the metropolitan Brisbane averages. The retail spending data is presented in four major spending categories:

- **Food, Liquor and Groceries (FLG)**, which includes fresh food, groceries and take-home liquor.
- **Food Catering**, which includes cafes, restaurants and takeaway food (including fast food outlets).
- **Non-Food**, which includes apparel, homewares, bulky merchandise and general merchandise.
- **Services**, including hairdressers, beauty salons etc.

Overall, average per household retail spending by study area residents is estimated at \$43,320, which is 11.6% above the Greater Brisbane average. Spending on food catering per household by study area residents is just below the average for total Brisbane. All spending estimates in this report are expressed including GST.

Table 4.1: Average Per Household Retail Spending, 2021

Region	Food, Liquor and Groceries	Food Catering	Non Food	Services	Total Retail
Study Area	\$18,790	\$4,430	\$18,700	\$1,390	\$43,320
Greater Brisbane	\$16,140	\$4,490	\$16,740	\$1,440	\$38,820
<i>Variation</i>	<i>+16.4%</i>	<i>-1.3%</i>	<i>+11.7%</i>	<i>-3.5%</i>	<i>+11.6%</i>

Source: MarketInfo; Ethos Urban

The total retail spending capacity of the Study Area population is detailed in Table 4.2. It is calculated by multiplying the current and future population/dwelling forecasts (refer Chapter 2), with the per household retail spending estimates from the previous Table 4.1. The spending forecasts are presented in constant \$2021, i.e. excluding the effects of price inflation.

The total retail spending capacity of the Study Area population is estimated at \$272 million in 2021, including \$27.8 million of food catering spending. Retail spending by Study Area residents is

projected to increase very strongly over the forecast period to approach \$660 million at 2036, including \$63.1 million of food catering spending.

Table 4.2: Study Area Retail Spending Capacity, 2021 to 2036 (\$2021)

Retail Category	2021	2026	2031	2036
FLG	\$118.2m	\$170.6m	\$214.8m	\$259.3m
Food Catering	\$27.8m	\$40.6m	\$51.7m	\$63.1m
Non-Food	\$117.6m	\$181.3m	\$243.9m	\$314.5m
Services	\$8.8m	\$13.2m	\$17.3m	\$21.7m
Total Retail	\$272.3m	\$405.7m	\$527.7m	\$658.6m

Source: MarketInfo; Ethos Urban

4.2 Supply of Fast Food Restaurants

At present four chain fast food outlets operate within the study area, namely McDonald's and Domino's Pizza outlets within the Yarrabilba Local Town Centre and KFC and McDonald's at Logan Village, as summarised in Table 4.3.

Immediately beyond the Study Area are McDonald's, Domino's Pizza, KFC and Subway outlets in Jimboomba to the west, while a Subway outlet is situated in MacLean.

The location of major chain fast food restaurants in the surrounding region is shown in Figure 4.1.

Table 4.3: Major Chain Fast Food Restaurants within the Study Area

National Fast Food Outlets	Address	Distance by road from Subject Site	Comments
McDonald's Yarrabilba	35 Yarrabilba Dr, Yarrabilba QLD 4207	1.8 km	Located adjacent to Coles supermarket, includes drive-thru facility
Domino's Pizza Yarrabilba	36 Yarrabilba Dr, Yarrabilba QLD 4207	1.8 km	Located in Yarrabilba Village commercial centre
KFC Logan Village	2-30 Logan Street	2.3 km	Recently opened
McDonald's Logan Village	2-10 Logan Street	2.3 km	Recently opened

Source: Ethos Urban

McDonald's Yarrabilba



Source: Google Street View

Domino's Pizza Yarrabilba



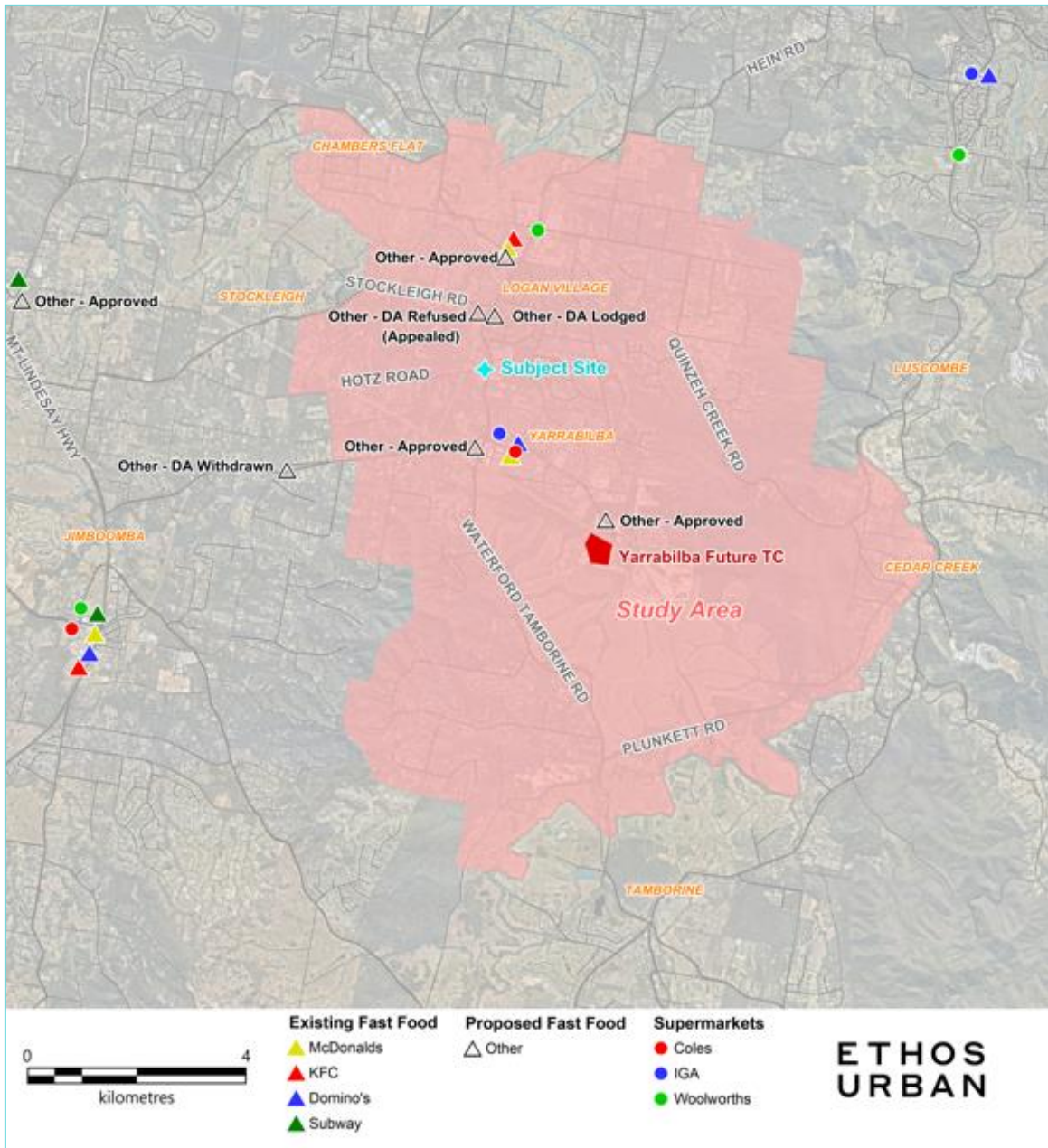
Source: Google Street View

KFC Logan Village



Source: Google

Figure 4.1: Locations of Fast Food Restaurants in Study Area and Surrounds



Proposed Food and Drink Outlets

A number of food and drink outlets have development approval in the local area (refer Table 4.4) including the following:

- A 307 sq.m food and drink outlet has development approval to be located adjacent to the recently opened Ampol service station located at the intersection of Yarrabilba Drive & Mill Street in Yarrabilba.
- At 1601-1621 Waterford Tamborine Road, Logan Village is development approval for a service station, convenience shop, and a 182 sq.m food & drink outlet.
- A commercial development to contain a food and drink outlet with a drive-thru facility and three shops/food and drink outlets has received development approval for a site at 2-10 Logan Street, Logan Village, adjacent to the recently opened KFC and McDonald's.

Other potential food and drink outlets in the Study Area include:

- Two fast food outlets were proposed at 1335-1371 Waterford Tamborine Road, together with a service station and a convenience store. The development application was refused, with the decision understood to be currently under appeal.
- A development application has been submitted for two food and drink outlets with drive-thru facilities, together with a workshop and car wash facility, at 1322-1330 & 1332-1346 Waterford Tamborine Road.

Table 4.4: Approved Food and Drink Outlets in Surrounding Area

Approved Food and Drink Outlets	Project Address	Distance by road from Subject Site	Status
Within Study Area			
Waterford Tamborine Road Service Centre	1601-1621 Waterford Tamborine Rd, Logan Village	1.5 km	Development Approval
Commercial Development (Parmac Property Group)	2-10 Logan Street, Logan Village	2.3 km	Development Approval
Ampol Australia	Yarrabilba Drive & Mill Street, Yarrabilba	4.4 km	Development Approval
Beyond Study Area			
Mount Lindesay Highway	4788-4796 Mount Lindesay Highway, North MacLean	12 km	Development Approval

Source: Ethos Urban; Cordell Connect

4.3 Demand Analysis

Fast food outlets compete for a proportion of the food catering spending market. As detailed previously, the total food catering spending capacity of residents in the Study Area is estimated at \$27.8 million in 2021, and is projected to increase to \$40.6 million by 2026 (constant \$2021) and further to \$51.7 million by 2031.

With growth in the food catering spending market over the next five years of +\$12.8 million, it is clear demand exists for additional cafés, restaurants and fast food outlets to serve the need of Study Area residents.

According to analysis undertaken by property consultancy group LocationIQ, in 2020 a leading national fast food outlet is provided for every 3,600 persons in metropolitan areas. This is generally in accordance with site-based analysis of major fast food outlets undertaken by our firm, noting that some regional variance occurs based on local circumstance with the range typically between one per 3,000 to 4,000 people. This includes urban growth areas where major brand operators will often seek to operate new stores in a relatively timely manner to serve rapidly growing areas.

The provision of all food and drink outlets, including independent and smaller brand traders, has been estimated at one per 790 persons in Greater Brisbane by property consultancy group Urbis, for a Needs Assessment published in June 2021 for 1322-1330 Waterford-Tambourine Road. Again, this is relatively consistent with our own site-based analysis for clients across Australia.

The above analysis indicates that at 2021 demand exists for five national major fast food outlets in the Study Area (based on a population of 18,890 persons), increasing to 7-8 national brand fast food outlets by 2026 once the Study Area population reaches 26,890 residents.

Indicative demand in the Study Area for a total of 24 takeaway food businesses is in the Study Area at 2021, increasing to 34 by 2026 adopting the analysis of Urbis.

Demand would also come from passing trade of residents and workers who do not live locally. It is noted that the Subject Site is ideally located to serve passing trade, with extensive frontage and direct access from Waterford Tamborine Road.

Four national brand fast food outlets are currently located in the Study Area – two at Logan Village (KFC and McDonald's) and two at Yarrabilba (McDonald's and Domino's Pizza).

Two sites within or adjacent to Yarrabilba are proposing food and drink outlets as part of a service station development, although the tenants are currently unknown. A commercial development is to contain a food and drink outlet with a drive-thru facility together with three adjoining shops/food and drink outlets has approval for a site in the Logan Village Centre.

Based on the population growth projected for the Study Area and the typical provision of fast food outlets, and takeaway food outlet more broadly in urban areas, the demand for two fast food outlets exists at the Subject Site. This is expected to include a national brand operator, as well as most likely an independent or smaller brand operator co-locating with the service station.

Overall market growth in the Study Area also allows for the timely provision of national brand and other fast food outlets at approved developments, and in activity centres.

4.4 Economic and Community Implications

A range of economic and community benefits are likely to result from the proposed development of two fast food outlets at the Subject Site, with the key benefits including the following:

- **Serve the needs of the community.** The economic needs assessment identifies the market need for further fast food outlets in the Study Area as the population of the area rapidly increases. The population of the Study Area is projected to increase by some +8,000 residents over the next 5 years, and the proposed development would be excellently placed to serve the need of existing and future residents in the Study Area, as well as passing trade.
- **Increase choice and convenience.** The planned development at the Subject Site would greatly increase consumer choice by introducing two new fast food outlets into the area. This will provide local residents and passing trade with a greater choice of brands, increasing convenience for patrons.
- **Create job opportunities.** The proposed development will create direct ongoing jobs with two fast food restaurants of 490 sq.m creating an estimated minimum 20 direct ongoing retail jobs, based on the industry standard of around 40 jobs per 1,000 sq.m of floorspace. The actual number of people employed may be much higher, with some leading fast food restaurants employing an average 40 workers per store.

Fast food outlets at the Subject Site would serve local residents, local workers and passing trade. Any potential impact from the proposed development on existing retailers would be spread over numerous fast food outlets within and beyond the catchment.

Given that the food catering expenditure capacity of study area residents is currently \$28 million and is projected to exceed \$40 million by 2026, as well as the competitive context of the area, the proposed development of two fast food outlets at the Subject Site will not have any significant impact on existing or proposed food catering outlets in the region.

5 Childcare Needs Assessment

This Chapter provides an assessment of the economic need and implications of a childcare centre at the Subject Site.

5.1 Childcare in Australia

Childcare in Australia has evolved significantly over the last 20 years with an increasing number of females returning to the workforce sooner after childbirth and looking for long day care options.

Australia has one of the highest levels of university educated females in the world. As a result of having children, the high cost of childcare, and the shortage of places, many women struggle to return to the workforce after having children. Over the years Governments have stressed the importance of lifting Australia's female participation rate in order to increase the size of the economy.

Today childcare in Australia takes on a myriad of forms. While many families take advantage of long day care, grandparents and family networks also play a significant role in assisting with childcare. The Australian Institute of Family Studies released the report *Child Care Participation and Maternal Employment Trends in Australia*, authored by Jennifer Baxter, in 2013. The report shows that changes in child care participation have been occurring for many years, and states that, "*In Australia, the significant growth in maternal employment that has occurred over recent decades has meant that the provision of child care has become a key strategy and government priority for facilitating mothers' employment*". Figures from the report highlight the substantial growth over the years in the number of women with children under 15 years of age in the workforce.

In July 2017 the Federal Government implemented a \$3.5 billion Jobs for Families package, which established a new Child Care Subsidy. The Child Care Subsidy generally increase each year. In 2021, for families with incomes of up to around \$70,000 the Child Care Subsidy provides 85% of childcare fees. The subsidy tapers down to 50% for families who earn over \$175,000 per year and ends for families earning more than \$354,000 per annum. From July 2022, the Federal Government will provide additional support to families with multiple children under the age of 6 (subject to legislation). It is estimated that the change will increase the total Child Care Subsidy paid by the government by \$1.7 billion.

Various types of childcare services cater to the varied needs and demands of parents. Some of the key types are described briefly as follows:

- **Long day care (LDC):** The predominant form of formal childcare, these facilities cater to children up to school age. Long day care services are generally provided at a building specifically designed for childcare purposes and often operate between 7.30am – 6.30pm. This type of childcare is the basis for the application at the Subject Site and the focus for the analysis in this Chapter.
- **Family day care:** Family day care services deliver home-based education services and care for children, and are typically based in educators' homes.
- **Before/after school care and vacation care:** This type of care is provided in locations such as schools and community halls, and largely caters for primary school aged children.
- **Occasional care:** Occasional care is typically short term and on casual basis.

The Australian Government, Department of Education, Skills and Employment, recently published the *Child Care in Australia* report for the March quarter of 2020. The report finds that during the March quarter 2020, the average weekly hours for children in centre-based day care was 30 hours. This reflects an average attendance of approximately three days per week.

5.2 Childcare Participation Rates

A participation rate can be applied to the population of a defined study area to assess the underlying expected demand for LDC places in an area. Given the ongoing increases in childcare funding implemented by the Federal Government over recent years, together with the increasing participation of females in the workforce, it is expected that childcare participation rates will continue to increase in the future.

The ABS published Childhood Education and Care report provides detail on the number of children in care (ABS Catalogue Number 4402.0). Utilising this information, it is possible to derive a ratio of the number of children in long day care as a proportion of all children aged 0-4 years, referred to in this report as the participation rate.

In June 2017 (latest available ABS data), the proportion of children aged 4 years and younger in long day care was 35%. This proportion has been steadily increasing over the years and was 18% in June 1999 and 28% in June 2008 (source ABS). The proportion of children in care also varies by age. The following Figure 5.1 illustrates the proportion of childcare in formal and informal care by age, sourced from the Australia Institute of Health and Welfare (AIHW).

Figure 5.1: Use of childcare by age, 2017

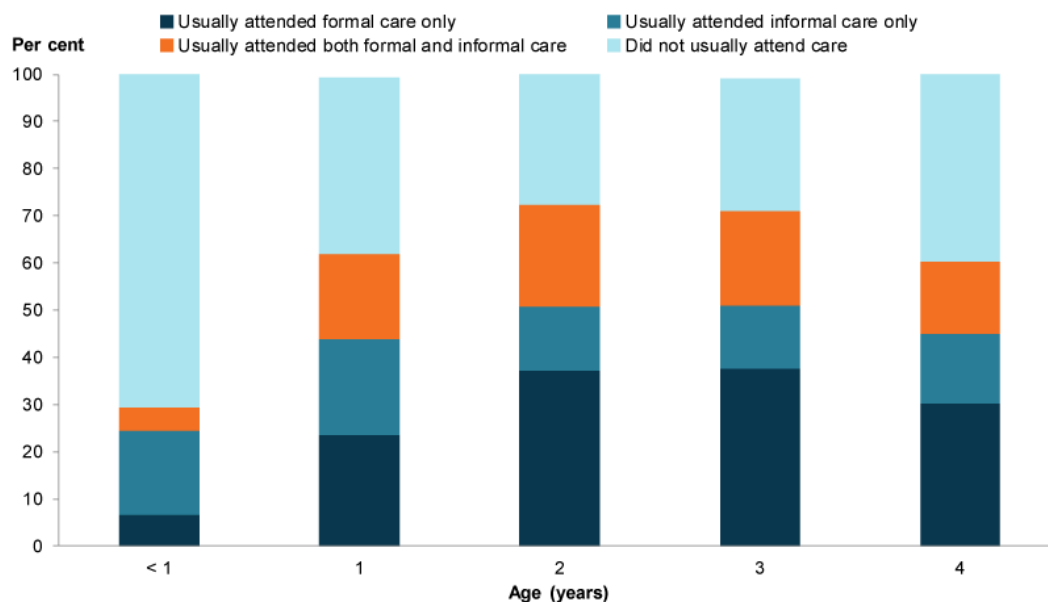


Chart: AIHW. Source: ABS 2018a.

The ABS Childhood Education and Care publication identifies children attending childcare as any person aged 0-12 years, with childcare services including preschool, long day care (LDC), family day care, in-home care, occasional care and outside school care. Children in long day care are mostly aged 4 years and under.

Using data from the ABS the proportion of children aged 0-4 attending long day care can be estimated. In broad terms, the proportion of the children aged 4 years and under using LDC in a Major City of Australia (38%) is higher than for more remote areas (28%) as at 2017. In Queensland, Major City of Australia refers to the urban areas of South-East Queensland (i.e. Brisbane, Gold Coast and Sunshine Coast).

The same publication provides information on the proportion of children in childcare by state. The data by state and by remoteness is only provided for children aged 0-12 years, with no specific data

for children aged 0-4 years. Nevertheless, the data reveals that the proportion of children in long day care in a Major City in Queensland is 16% higher than for all Major Cities in Australia overall (18.7% compared with 16.1%). Therefore, the implied long day care participation rate for a Major City in Queensland is calculated at 44%. This figure is 16% higher than the average rate of 38% for children in long day care and who live in a Major City of Australia (as at 2017).

The Queensland Government also collects data on childcare services through the Queensland Early Childhood Education and Care Services (ECEC) Census. The annual data collection from the early childhood education and care sector occurs during early August of each year. The participation rate in 2020 can be calculated by dividing the total number of children aged 4 years and under enrolled in childcare centres in Queensland (149,498), with the total population of children aged 4 years in Queensland (312,739 as at September 2020). This equates to a participation rate of 47.8% in 2020. The participation rate was calculated at 47.7% in 2019 and 45.7% in 2018.

This data set is different to the ABS data as it includes children who utilise limited hours care or occasional care services. Another difference is that the data is based upon enrolments and not children in care, resulting in a potential overstatement of the participation rates as some children may be enrolled in more than one centre. Nevertheless, the data does confirm that a high proportion of children in Queensland attend long day care relative to the balance of Australia.

5.3 Supply of Childcare Places

Two childcare centres are located in the Logan Village Centre to the north - Goodstart Early Learning and Childcare Angels.

Four childcare centres offering long day care services are located within the growing Yarrabilba precinct. One centre is located in the Yarrabilba Local Town Centre opposite the Coles supermarket (Grand Kids Early Learning), while the other three centres are located in residential areas in the southern part of the Lendlease estate.

King's Christian College has an early learning centre that offers some long day care services for children aged over 2 and half years and are enrolled at the school. Given the service is not a traditional long day care centre available for all local residents it has been excluded from this analysis.

A summary of each childcare centre located in the Study Area, including the number of approved long day care places, is shown in Table 5.1. The location of these centres and other childcare centres with LDC are shown in the following Figure 5.2.

Table 5.1: Supply of LDC Childcare Centres within the Study Area

Childcare centre	Address	Distance by Road From Subject Site	Approved LDC Places
Goodstart Early Learning Logan Village	24 North St, Logan Village	3 km	135
Logan Village Childcare Angels	36-38 River St, Logan Village	3.1 km	45
Grand Kids Early Learning	17-27 Wongawallan Dr Yarrabilba	1.7 km	130
Harmony Early Learning Journey Yarrabilba One	30-40 Woodward Ave, Yarrabilba	2.4 km	190
Sparrow Early Learning Yarrabilba	3 Combs St, Yarrabilba	3.4 km	99
Harmony Early Learning Journey Yarrabilba Two	7001 Yarrabilba Dr, Yarrabilba	3.8km	105

Source: Australian Children's Education & Care Quality Authority; Ethos Urban

The Queensland ECEC Census provides data on the number of enrolments at the ABS Statistical Area 2 (SA2) level. The study area used in this report does not align with SA2 boundaries, although is within the SA2s of Logan Village, Chambers Flat - Logan Reserve and Jimboomba.

The total number of reported long day care, limited hours care and occasional care enrolments as sourced from the Queensland annual childcare census in these relevant SA2s is shown in Table 5.2. The enrolment figures are for each day a child attends a centre, i.e. a child who attends long day care every weekday would count as five enrolments. The figures illustrate the strong growth in enrolments in this part of Brisbane, with enrolment growth averaging 11% per annum from 2018 to 2020.

Table 5.2: Childcare Enrolments in Relevant SA2

SA2	Enrolments		
	2018	2019	2020
Logan Village	253	237	257
Chambers Flat - Logan Reserve	0	0	85
Jimboomba	<u>1,098</u>	<u>1,320</u>	<u>1,334</u>
Total	1,351	1,557	1,676

Source: Early Childhood Education and Care Services Census; Ethos Urban

Proposed Childcare Centres

The childcare centres approved in the Study Area and surrounding region are shown in Table 5.3. Current proposals are as follows:

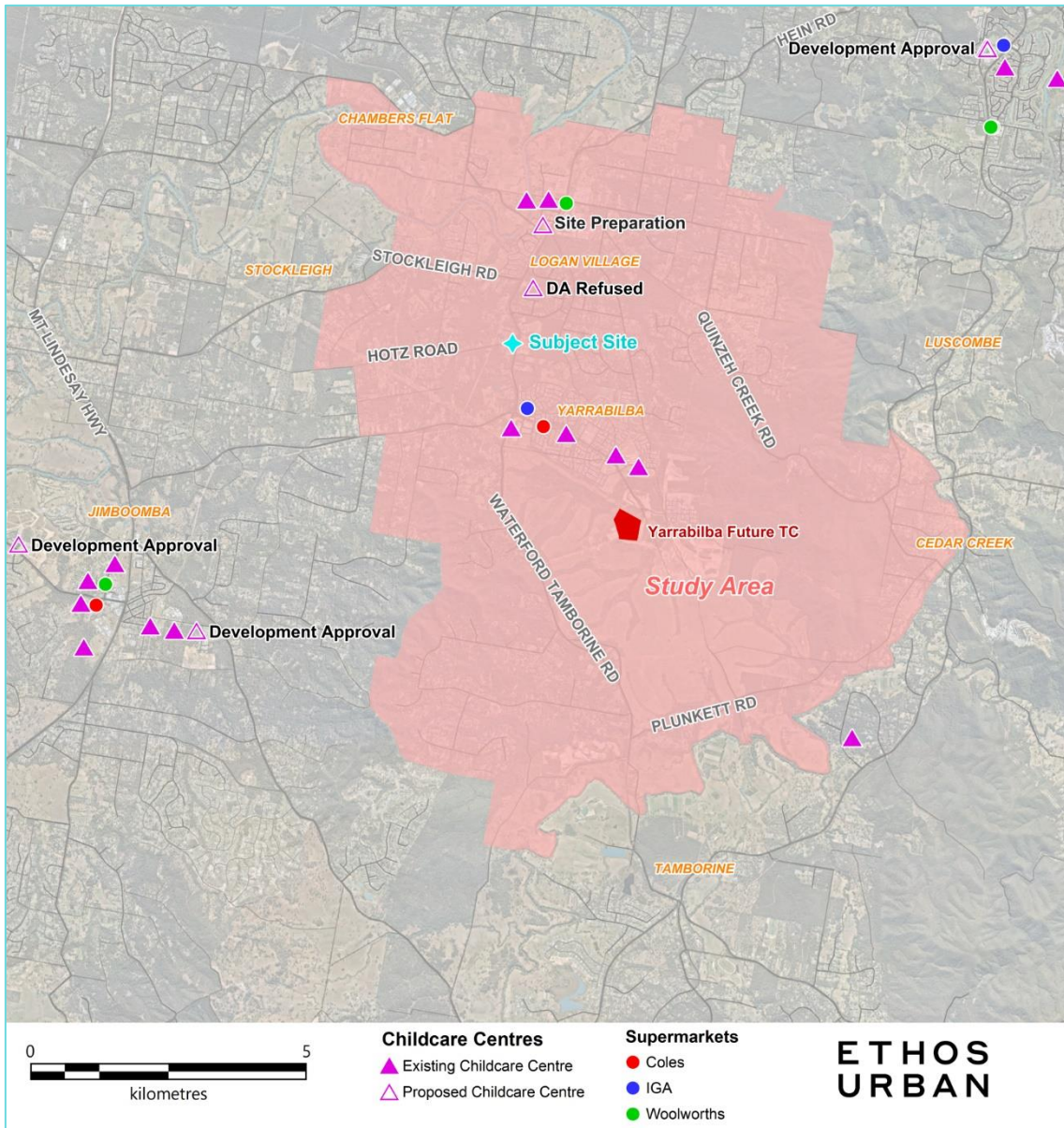
- A 121 place childcare centre has approval at 2-30 Logan Street, Logan Village, adjacent to the KFC and McDonalds food outlets and 7-Eleven service station. Site works for the overall development are underway.
- A childcare centre was planned at 1332-1346 Waterford Tamborine Rd, Logan Village, adjacent to the recently developed Shell Coles Express service station. The childcare was planned to be developed in two stages, with Stage 1 to provide 90 places and Stage 2 a further 60 places. The development application for the childcare centre was refused.

Table 5.3: Approved LDC Childcare Centres within the Study Area

Childcare Centre	Address	Distance by Road from Subject Site	LDC Places	Status
Within Study Area				
Logan Street Child Care Centre	2-30 Logan Street	2.3 km	121	General site works underway
Beyond Study Area				
Bahrs Scrub Road Community Development	32 Bahrs Scrub Rd, Bahrs Scrub	15 km	150	Development Approval
Elephas Education Jimboomba	95-103 East Street, Jimboomba	11 km	80	Development Approval (Conditional)
Merivale Avenue Child Care Centre	1-5 Merivale Avenue, Jimboomba	13 km	103	Development Approval (Conditional)

Source: Cordell Connect; Ethos Urban

Figure 5.2: Locations of LDC Childcare Centres in Study Area and Surrounds



5.4 Childcare Demand Analysis

This sub-section provides a demand analysis of long day care places (LDC) in the Study Area, and compares this expected demand with the current and likely future supply. T

It is noted, of course, that people will use childcare centres outside the defined catchment, and also people living in the broader region will use childcare centres within the local area. The following analysis is to provide an indication of the potential over or undersupply of long day places in the local area, and the analysis should be viewed as a general indication of need.

The demand analysis for childcare facilities in the study area is assessed in Table 5.4, with the following methodology applied:

- Determine the population of the study area (refer Chapter 2) and estimate the number of children aged 0-4 years in the area over the forecast period to 2036. In 2016 the proportion of children aged 0-4 years of the total population was 8.9%. This proportion is likely to increase as more young families move into the area, though for the purposes of the analysis in this report this proportion is expected to remain constant over the forecast period.
- Apply a participation rate for children in LDC informed by the benchmark for metropolitan Brisbane. For this area a participation rate of 50% for children aged 0-4 years in LDC has been adopted. This is based on the participation rate calculated for Major Cities in Queensland as at 2017, of 44%, and factoring in an increase given the recent funding boost to childcare and other factors including socio-economic profile of Study Area residents. It is noted that the ECEC Census suggests that the participation rate was 48% for children aged 0-4 years in 2020 for all of Queensland, though is it acknowledged some issues with this data set mean some caution is appropriate.
- Apply an attendance rate of 60% (i.e. an average attendance of 3 days a week), as reported in the Child Care in Australia report March quarter 2020 published by the Department of Education, Skills and Employment.
- Make an allowance for children aged 5 years before they attend school. Data from the Queensland childcare census details that children aged 5 years make up around 5% of total enrolments at long day care centres in Queensland.
- Detail the current and approved long day care places available in the study area, which are outlined in the previous sub-section. At 2021 there were 599 approved LDC places across five childcare centres in the study area. Harmony Yarrabilba Drive opened in early 2022 and provides 105 places, while a childcare centre with 121 places is approved for Logan Village. These centres will increase the supply of LDC places in the study area to 825 in the short term.
- The next step is to apply an appropriate occupancy rate for the existing and proposed centres. It is important to note that given that children typically attend childcare on average of 3 days a week on various days, it is unlikely that childcare centres are always at full capacity every day. In our experience, once average occupancy rates in an area exceed 85% there is a supply restriction of childcare places. It is generally accepted that an occupancy rate between 70% to 80% represents a reasonable balance of ensuring adequate choice and competition in an area, though also ensuring existing centres can operate viably and provide a quality service.
- Therefore, the following table details the estimated over/under supply of childcare places in the study area assuming occupancy rates of 85% and 75%. A high occupancy rate of childcare centres can substantially restrict the choice of days for residents, particularly for specific age groups where availability of days may differ. It is imperative that occupancy rates are not too high for a particular area, otherwise choice of centre would diminish

significantly, particularly for families with multiple children requiring care across multiple days.

This analysis shows the rapid growth of children aged 4 years and under in the study area, which are expected to double over the next 15 years from 1,681 to 3,537. Applying a participation rate of 50% of children using LDC, and adopting an attendance rate of 3 days per week and an occupancy rate of 75%, an undersupply of around 80 childcare places exists in the Study Area currently. The undersupply of LDC places is projected to increase to 137 places by 2026, which takes into account the future/proposed childcare centres in the area.

Table 5.4: LDC Childcare Demand Analysis

	2021	2026	2031	2036
Study area population	18,890	26,890	33,390	39,740
Est. children aged 0-4 years (at 8.9% of total)	1,681	2,393	2,972	3,537
<u>Participation rate of 50% (children 0-4 years)</u>				
Est. demand for childcare places	841	1,197	1,486	1,768
Typical attendance rate at 60% (3 days a week)				
Est. average daily demand (children 0-4 years)	504	718	892	1,061
Est. demand for children aged 5 years (5% of total)	27	38	47	56
Est. average daily demand (children 0-5 years)	531	756	938	1,117
<hr/>				
Total available childcare places (supply)	599	825	825	825
<u>85% occupancy</u>				
Available childcare places at 85% occupancy	509	701	701	701
Assessed under (-)/ over (+) supply	-22	-55	-237	-416
<u>75% occupancy</u>				
Available childcare places at 75% occupancy	449	619	619	619
Assessed under (-)/ over (+) supply	-82	-137	-320	-498

Source: Australian Children's Education & Care Quality Authority; ABS; Cordell Connect; Ethos Urban

5.5 Economic and Community Implications

In terms the community and economic need for a childcare centre at the Subject Site, the following are the key benefits that a likely to arise from the proposed development.

- **Support female workforce participation.** A key obstacle for females returning to the workforce is access to affordable childcare. Therefore, it is imperative to provide a range of childcare options to ensure females in the local community that wish to return to the workforce have easy access to childcare facilities in the local area. The proposed childcare centre would, therefore, support females in the community return to the workforce.
- **Increase choice and downward pressure on fees.** In any locality it is important to provide a range of childcare options for the community in order to offer a wide choice of facilities and to put downward pressure on fees. All childcare centres offer different services and are different in size. The proposed childcare centre would add to the choice of childcare centre in the Study Area, and would particularly provide a centre which is convenient from both Logan Village and Yarrabilba.
- **Cater to rapid growth of young families.** The Study Area is one of the fastest growing areas of Brisbane, and substantial residential development is occurring in Logan Village and Yarrabilba.

Much of the development is catering to family households, and a significantly number of young families, or couples looking to start a family, are moving into the area. The planned childcare centre at the subject site would cater to this increasing demand and need for childcare facilities in the local area.

- **Create local jobs.** The planned childcare centre is expected to provide direct and ongoing employment opportunities for 28 staff at the centre. Additional temporary jobs would also be created during the construction period of the project, in the construction and related industries.

The needs assessment in this report outlines the rapid growth in young children in the Study Area, many of which will attend a formal childcare centre.

Given that the demand for LDC childcare places will exceed the assessed supply able to ensure adequate choice in the local area, the proposed childcare centre at the Subject Site will not have any adverse impacts on the viability of existing or proposed LDC centres in the area. Importantly, any impact would be mitigated by the ongoing rapid population growth occurring in the area, and any potential impact would certainly not threaten the long-term viability of any childcare centre in the area.

In summary, Australia has one of the highest levels of university educated females in the world and currently more than half of all traditional families with a child aged 0-4 years have two working parents. Demand for childcare places is expected to continue to rise in line with increased female participation in the workforce.

At 2021, five childcare centres were located within the Study Area, providing a total of 599 childcare places. The Study Area population is estimated at 18,900 residents at 2021, with an estimated 1,680 children aged 4 years and younger.

Based on the analysis presented in this report an undersupply of long day care places in the Study Area will increase by 2026 even allowing for new and proposed centres in the area.

The proposed childcare centre at the Subject Site would provide an important community service and is not assessed to have an adverse impact on any existing or proposed childcare centre in the area. The range of community benefits arising from the proposed centre would outweigh any potential negative impacts on other childcare centres in the area, and therefore the development of a childcare centre at the Subject Site is assessed to result in a net community benefit.

6 Conclusion

The proposed development of a service station, two fast food restaurants and a childcare centre at the Subject Site is supported in the context of existing and forecast market demand for each use. The surrounding region has experienced substantial population growth in recent years and is a key growth area of outer Brisbane. This rapid population growth will continue in the future and supports the needs for new facilities and services to serve the growing needs of the local community.

The Subject Site is considered to be an ideal location for the proposed development, and it is noted that two new national operators and a childcare operator are already committed to the proposed development (subject to approval). The pre-commitment of operators ensures that the proposed development is viable and will introduce new and well recognised brands to the local community.

The proposed development is consistent with the Logan Planning Scheme 2015, which is addressed in further detail below.

- Community and economic need for the use.

This report provides analysis which demonstrates a community and economic need for each of the proposed uses, including two fast food outlets, a service station and a childcare centre. In the relevant chapter for each proposed use, the appropriate demand and supply factors are clearly stated, and the analysis shows that the market exists for each of the proposed uses.

The assessment also details the range of community benefits that will arise from the proposed development. Therefore, based on the analysis presented in this report, a community and economic need for the proposed development is identified which will attract investment and create jobs for the community.

- Development is of an appropriate scale.

The size of each planned facility is detailed in Chapter 1 of this report. The plan clearly shows the proposed built form of each use, the provision of car parking as well as ingress and egress points from the surrounding road network. The scale of development is typical for each of the planned uses and there would be an appropriate provision of carparking and circulation. The concept plan for the proposed development has also had consideration for the requirements of the end users, which have already committed to the development.

The proposed uses, namely a service station, fast food outlets and childcare centre, are often provided in locations that are out-of-centre. Service stations and fast food outlets are often located on major traffic routes on highly exposed and convenient locations. Convenience is critical for these uses to be successful, and it is very common for service stations and fast food outlets to be located on major traffic routes and not within activity centres.

As an example, six service stations are located along Mount Lindesay Highway in Jimboomba and Maclean to the west of Logan Village. Only two of the service stations are located in a Centre Zone, with the other four outlets located in Mixed Use Zone, Farming Zone, Rural Residential Zone and a Priority Development Area.

Similarly childcare centres are often located in residential areas on well exposed sites. A general observation of childcare centres in the surrounding region reveals that most are not located in designated activity centres.

Logan Village and Yarrabilba are the two closest and most relevant centres for the proposed development. The key anchors of each centre, and which by far attract the most visitations, are the supermarket tenants (Woolworths at Logan Village and Coles/IGA at Yarrabilba). In broad terms, full-scale supermarket anchored centres attract in the order of two million visits by people each year (source data published by Property Council of Australia). The viability

and attractiveness of each centre is highly dependent on the performance of the major supermarket anchors.

The proposed development at the Subject Site would not have any noticeable impact on the supermarket anchors, and therefore would not threaten or impact on the centre hierarchy outlined in the Scheme. The assessment in this report goes further than the requirements of the Scheme, and demonstrates that the proposed development would not have an adverse impact on any existing or proposed facility in the designated centres, and would certainly not result in a loss of service for the community.

Based on the above points, it is concluded that the development is appropriate in scale, and is compatible with the role and function of the centre hierarchy of the region.

- Use does not have unacceptable adverse effects on any existing or planned centres.

This report provides detailed analysis that demonstrates that each of the proposed uses will not have adverse effects on the range of existing facilities provided within the Study Area. In other words, it is concluded that the proposed service station will not adversely impact on the viability of surrounding service stations; the proposed fast food outlets will not adversely impact the viability of surrounding fast food outlets; and the planned childcare centre will not adversely impact existing or approved childcare centres in the Study Area. The main reason for this conclusion is that there is the current demand for each use, and this demand will continue to increase over the forecast period.

Given that the major anchor tenant of the Logan Village Centre is a Woolworths supermarket, and the key anchors for the Yarrabilba Centre are Coles and IGA supermarkets, it is clear that the proposed development would in no way have an unacceptable adverse effect on the entire centre of either Logan Village or Yarrabilba. In particular, the role and function of each centre would not be affected by the proposed development in any noticeable way.

- No other sites available in designated centres.

It is firstly noted that Yarrabilba is managed by Economic Development Queensland and Logan City Council is not the planning authority of the Priority Development Area. Yarrabilba is a masterplanned community, and it is our understanding no vacant sites are for sale in the area which could accommodate the proposed uses. Furthermore, Yarrabilba already includes numerous existing and proposed service stations, fast food outlets and childcare centres, and it is considered appropriate to also provide these uses outside Yarrabilba to maximise the convenience for consumers.

Logan Village Centre is the only other designated centre in the Scheme located within the Study Area. Figure 1.5 in Chapter 1 of this report shows the extent of the Logan Village Centre as well as the existing built form (as at 2017).

Only two vacant sites are in Logan Village Centre which could physically accommodate the proposed development. One is located on the northern side of Logan Street and is designated in the Scheme as a Village Green, and is therefore not appropriate for the proposed development.

The second site is located on the southern side of Logan Street with frontage to Albert Street. Development of this site is now partly completed and includes a 7-Eleven service station as well as KFC and McDonald's restaurants fronting Waterford Tamborine Road. A childcare centre is also proposed.

Given the above, no realistic opportunity exists for the proposed development to be appropriately accommodated within the Logan Village Centre. This is particularly with

reference to land with direct frontage to Waterford Tamborine Road which is considered vital for trading success.

Therefore, it is concluded that the proposed development cannot be realistically located in another centre designated in the Scheme and serve the needs of the local community.

It is further noted that while the proposed uses are often located within activity centres, numerous examples of service stations, fast food outlets and childcare centres are provided in out-of-centre locations throughout the surrounding area.

Given all of the above, it is concluded that the proposed development is consistent with the Logan Planning Scheme as is relevant to economic need considerations.

In summary, the proposed development will deliver services to the local community; complies with the Logan Planning Scheme; caters to a demonstrated market need; will not have any adverse impacts to any existing or planned centre in the region; and will not affect the viability of any centre.

The development will cater to the growing demand for such services and will result in a range of benefits for the community such as increasing choice, contribute to investment in the local area and creating local jobs. These benefits are assessed to outweigh any potential negative impacts on existing or proposed uses in the area, and therefore a net community benefit will result from the proposed development.