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Assessment - Marsden

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**Economic and Community
Assessment - Marsden**

16 December 2009

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Executive Summary

Site

The subject site is located on the corner of Browns Plains Road and Fifth Avenue, Marsden. It is proposed to include a 3,200 Sq M supermarket and 1,400 Sq M of specialty stores. It is located midway between the shopping centre nodes of Browns Plains and Marsden Park.

Existing and Future Retail Infrastructure

Existing shopping centres are located along the north-south corridors along the Mount Lindesay Highway and Kingston Road with the nearest supermarket centre being the Marsden Park Shopping Centre. Residents surrounding the subject site have to travel to Browns Plains, Marsden or Logan Central to conduct their supermarket shop. A supermarket centre on the subject site will provide a more convenient option for local residents.

A 3,000 Sq M centre with a 1,500 Sq M supermarket has been proposed for the SouthWest1 development adjacent to the subject site. Should this development along with the subject site be approved then this will form a new retail node at Marsden. The 1,500 Sq M supermarket will not be able to fully cater for local residents weekly/fortnightly supermarket shopping needs thus still leaving need for a full line supermarket such as that proposed for the subject site.

Consumer Research

Consumer research was conducted in order to assess the current and likely shopping patterns of residents surrounding the subject site. It found that 82% of respondents shopped at a more than one centre with each centre trading to a distinct local catchment. It also found that 57% of respondents were either 'likely' or 'very likely' to conduct their main supermarket shop at the subject site instead of their present centre. At present many of these respondents are shopping at Marsden Park. It should be noted that almost all of these respondents are located within the catchment of the subject site and this represents only part of the catchment for Marsden Park, which extends to the east. Based on the results of the survey Conics estimates that 39% of convenience expenditure (or \$31M) is currently leaving the catchment. Much of this escape expenditure is directed towards the supermarkets at Browns Plains.

Trade Area Delineation

The trade area for the subject site is generally defined by main roads and the Marsden industrial area. Results from the consumer research regarding respondent's likelihood of patronizing the subject site also help to reinforce the defined catchment. Residents of the trade area are also expected to patronize other centres outside of the trade area such as Grand Plaza at Browns Plains.

Demographic and Expenditure Characteristics

The demographic profile of the trade area is that of young families with below average levels of household income. This demographic is constrained by time and will benefit from the convenience that a supermarket on the subject site will provide.

In 2009 there is projected to be approximately 21,976 people in the trade area having a household convenience expenditure of approximately \$85.0 million. A market this large is able to support two supermarket anchored centres and an Aldi.

Social Impact Analysis

The establishment of a supermarket anchored shopping centre on the subject site is considered to be a good fit with the needs of the community and will service the areas of Marsden Park, Crestmead and Heritage Park.

The construction phase of the development will provide 84 jobs to the community. Once completed the supermarket anchored centre is also expected to provide approximately 184 EFT jobs. These jobs will predominately be in the retail industry which provides employment opportunities for 'employment poor' groups including women and young adults.

Need and Impact Assessment

The subject site is well positioned between the shopping centre nodes of Browns Plains and Marsden Park. The proposed shopping centre development will combine with the planned retail on offer in the industrial estate which will see another retail node created in Marsden, benefiting nearby residents and the local employment base.

The identified trade area has a population of approximately 21,976 growing to approximately 22,614 in 2011. This equates to approximately \$87.9 million of convenience retail expenditure in the trade area in 2012. With a population over 22,000 people the trade area can support the subject site and part of the larger node at Marsden Park (2 supermarkets and an Aldi), Marsden Park will also trade to the suburbs to the east.

In a broader sense, the area south of the Logan Motorway, west of the Logan River and east of the Marsden industrial estate has a population of approximately 36,000 people and currently two full line supermarkets located at Marsden Park Shopping Centre and Waterford Plaza (which also trades outside of this area to the east). This planning area has been chosen as it forms a distinct urban residential area that is bounded by features that usually shape supermarket patronage patterns (and therefore catchments). Based on general rates of provision of 8,000 people for a full line supermarket the area can currently support up to four full line supermarkets. This area is therefore considered to be underserved and an expanded retail (supermarket) network is required. A supermarket on the subject site and the approved supermarket as part of the Marsden Park Shopping Centre expansion will bring the number of full line supermarkets in this area to four which is in line with rates of provision.

The subject site is expected to largely recapture expenditure from the trade area presently being lost to Browns Plains (an estimate \$31m per year) with Marsden Park continuing to trade close to current levels. This would see minimal impact (5% to 10%) on Marsden Park and it is assessed for this to occur a redevelopment/revamp of this centre would need to take place; otherwise the level of impact will be larger as patrons are attracted to the newer centre on the subject site. In the centres first year of operation the supermarkets at Browns Plains are expected to be impacted by 5% to 7%. Park Ridge Shopping Centre is expected to be impacted by 2% to 3%. Logan City Centre is expected to be impacted by 1% to 2%. These impacts are considered minimal and will not affect these centres ability to trade at viable levels and are expected to be partly offset by local growth.

A supermarket anchored shopping centre development on the subject site will benefit the community through a greater level of convenience and an increase in choice, local jobs, competition (resulting in lower prices) and product offer. It is also expected to act as a catalyst for the improvement of Marsden Park Shopping Centre further benefiting the community.

Introduction

INTRODUCTION

This report was commissioned by David Hedemann of Prime Corporation in December 2009. This report has been updated from a previous May 2008 report to reflect latest 2009 CPI figures, population projections, approvals and other changes. Survey information has not been updated with results as at April 2008 when the original survey was conducted.

The aim of this report is to prepare an economic and community assessment for the subject site located at Browns Plains Road, Marsden.

There is already approval for a childcare centre and a local shopping centre of 1,198 Sq M for the subject site. This new proposal seeks to replace the local shopping centre with a full line supermarket anchored centre.

A 4,600 Sq M supermarket anchored shopping centre is proposed for the subject site. This includes a 3,200 Sq M full line supermarket and 1,400 Sq M of specialty stores.

OBJECTIVES

The objectives for this report have been derived by Conics on the bases of experience in similar matters and the issues that arise. This Economic and Community Assessment addresses the need, impact and community implications for the proposed development.

1.0 Site Assessment

1.1 INTRODUCTION

The characteristics of the site and surrounding land uses are assessed from a market perspective to determine the most relevant locational considerations for the site.

1.2 SITE AND SURROUNDS

The subject site is located on the corner of Browns Plains Road and Fifth Avenue, Marsden. It is located approximately 4.5 km east of the Grand Plaza Shopping Centre at Browns Plains and 3.2 km west of Marsden Park Shopping Centre. A childcare centre and a local shopping centre of 1,198 Sq M has been approved for the subject site. The proposed development of 4,600 Sq M supermarket anchored centre will replace the proposed local shopping centre. This centre will include a 3,200 Sq M full line supermarket and 1,400 Sq M of specialty stores.

Browns Plains Road is a major traffic throughfare between Marsden and Browns Plains. The subject sites location along this road provides it with a high level of exposure to passing traffic as well as being easily accessible. It is located between two distinct shopping nodes at Marsden Park and Browns Plains. This will increase the likelihood of nearby residents patronizing the subject site as it is in a more convenient location than other nearby supermarkets.

Surrounding land uses include the Marsden industrial estate to the south of the site. There is also an industrial estate adjacent to the subject site which is currently being developed. These industrial estates act as employment hubs and the subject sites location near them provides it the opportunity to capitalize and the workforce population in these areas.

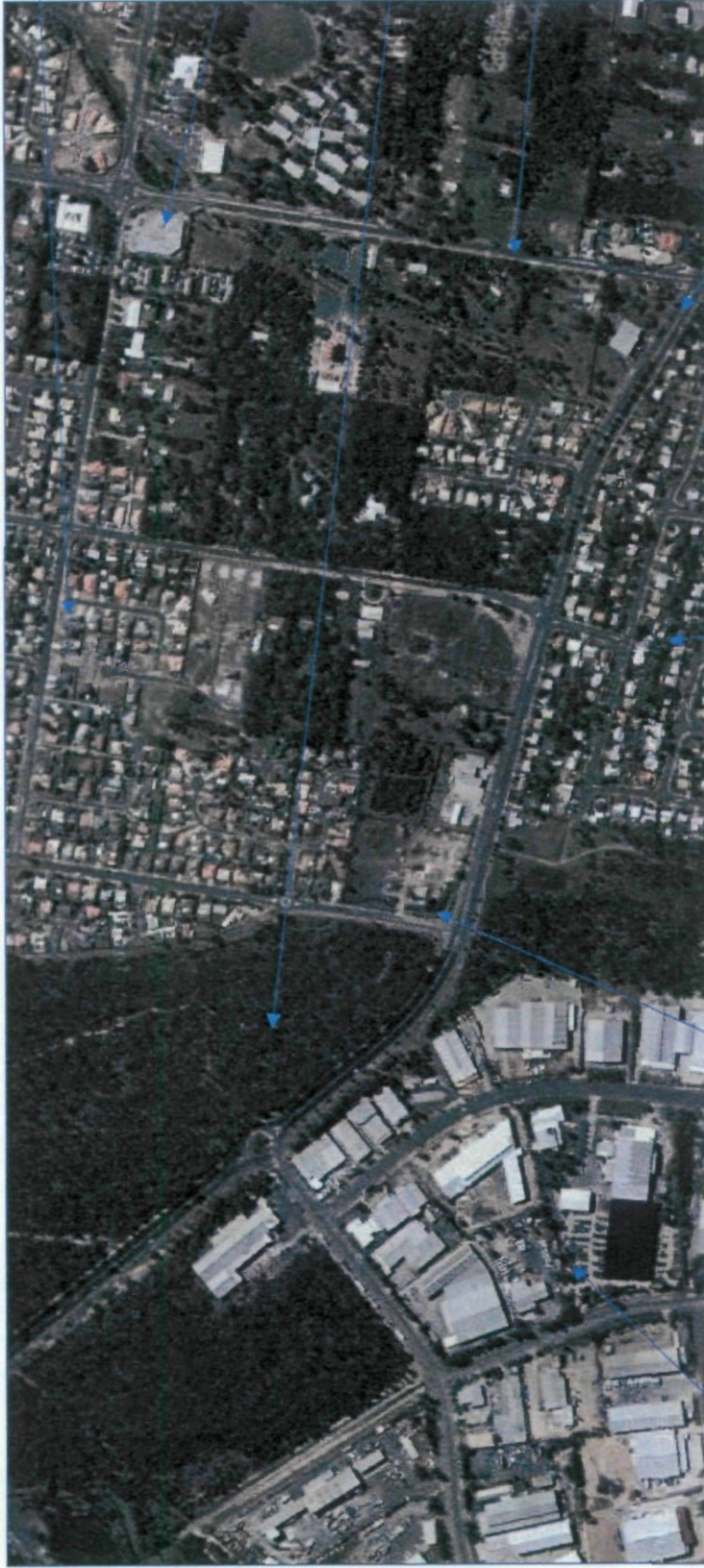
Immediately to the west of the site is the new SouthWest1 (SW1) Enterprise Park. This has 30Ha of development land with 35 lots ranging from 2,000 Sq M to 10,000 Sq M in size. SW1 will be a MIBA (mixed industry business area) with a focus on knowledge based industries¹. At completion this area is expected to host between 750 and 1,000 full time jobs. This development also has an approval for a retail service centre of up to 1,000 Sq M with a shopping centre limited to 500 Sq M. Retail uses in SW1 are expected to primarily cater to the on site working population in this development as well as the nearby Crestmead and Marsden industrial areas.

The subject site is also located proximate to the residential areas of Crestmead and Marsden. Residents of these areas are likely to form the subject sites main trade area. Under the Logan Planning Scheme 2006 the subject site is currently zoned as Residential 600 zone.

Figure 1.1 provides an illustration of the subject site and surrounding land uses.

¹ Source: www.southwest1.com.au

Figure 1.1 Site Overview



Newly developed residential area of Marsden

Local convenience centre which caters to impulse/top up shopping

Land currently being developed for the SW1 industrial estate

3rd Avenue which is a major traffic thoroughfare to Logan Central to the north

Browns Plains Road which connects Marsden in the east to Browns Plains in the west

Residential area of Crestmead

Subject Site which is located along a main arterial road

Marsden industrial estate which is an employment hub for local residents

1.3 IMPLICATIONS

The subject site is conveniently located along a major arterial road (Browns Plains Road) providing easy accessibility to passing traffic and a high level of visibility. Local residents will benefit from a 3,200 Sq M full line supermarket on the subject site as it will provide a greater level of convenience.

The subject site is located midway between two shopping nodes of Marsden Park and Browns Plains. As such the subject site will cater to a range of residents who presently shop at these nodes. Local residents will be attracted to the site by its location, convenience, appeal and choice.

The proposed shopping centre on the subject site is also in keeping with the character of the area with nearby industrial uses (and limited retail uses as part of industrial development) adjacent to the subject site. Some workers of these industrial areas (Marsden and SW1) will also conduct their supermarket and related shopping on their way home from work.

2.0 Existing Retail Infrastructure

2.1 INTRODUCTION

This section provides an overview and description of the existing supermarkets in the local and surrounding area. The purpose of this section is to provide an understanding of the size and range of existing supermarkets.

2.2 EXISTING SUPERMARKET INFRASTRUCTURE

Table 2.1 lists the surrounding supermarket infrastructure

Table 2.1
Existing Supermarket Infrastructure

Centre	Location	Size	Tenants
Marsden Park Shopping Centre	55-77 Chambers Flat Road, Marsden	8,222 Sq M	Coles (3,869 Sq M) and 37 specialty stores.
Loganholme Shopping Village	37-59 Bryants Road, Loganholme	5,339 Sq M	Foodworks Supermarket (1,866 Sq M) and 25 specialty stores.
Hyperdome Shopping Centre	Corner Pacific Highway and Bryants Road, Loganholme	99,108 Sq M	Myer, Kmart, Big W, Coles (6,062 Sq M), Bi Lo (4,138 Sq M), Woolworths (4,099 Sq M), Aldi (1,399 Sq M), Best & Less, JB Hi-Fi and 223 specialty stores.
Logan Central Plaza	38-74 Wembley Road, Woodridge	16,833 Sq M	Kmart, Coles (2,419 Sq M) and 58 specialty stores.
Logan City Centre	Corner Kingston Road and Wembley Road, Logan Central	16,039 Sq M	Woolworths (3,620 Sq M), IGA Supermarket (2,540 Sq M) and 67 specialty stores.
Parklands Plaza	99-101 Ewing Road, Logan Central	4,525 Sq M	Foodworks (1,200 Sq M) and 10 specialty stores.
Westpoint Shopping Centre	8-24 Browns Plains Road, Browns Plains	5,606 Sq M	Woolworths (2,300 Sq M) and 27 specialty stores.
Grand Plaza Shopping Centre	Corner Mount Lindsay Highway and Browns Plains Road, Browns Plains	51,483 Sq M	Target, Big W, Kmart, Woolworths (4,521 Sq M), Coles (3,880 Sq M), Aldi (1,468 Sq M), Best & Less and 153 specialty stores.
Park Ridge Shopping Centre	Corner Park Ridge Road and Mount Lindsay Highway, Park Ridge	5,265 Sq M	Woolworths (3,326 Sq M) and 16 specialty stores.

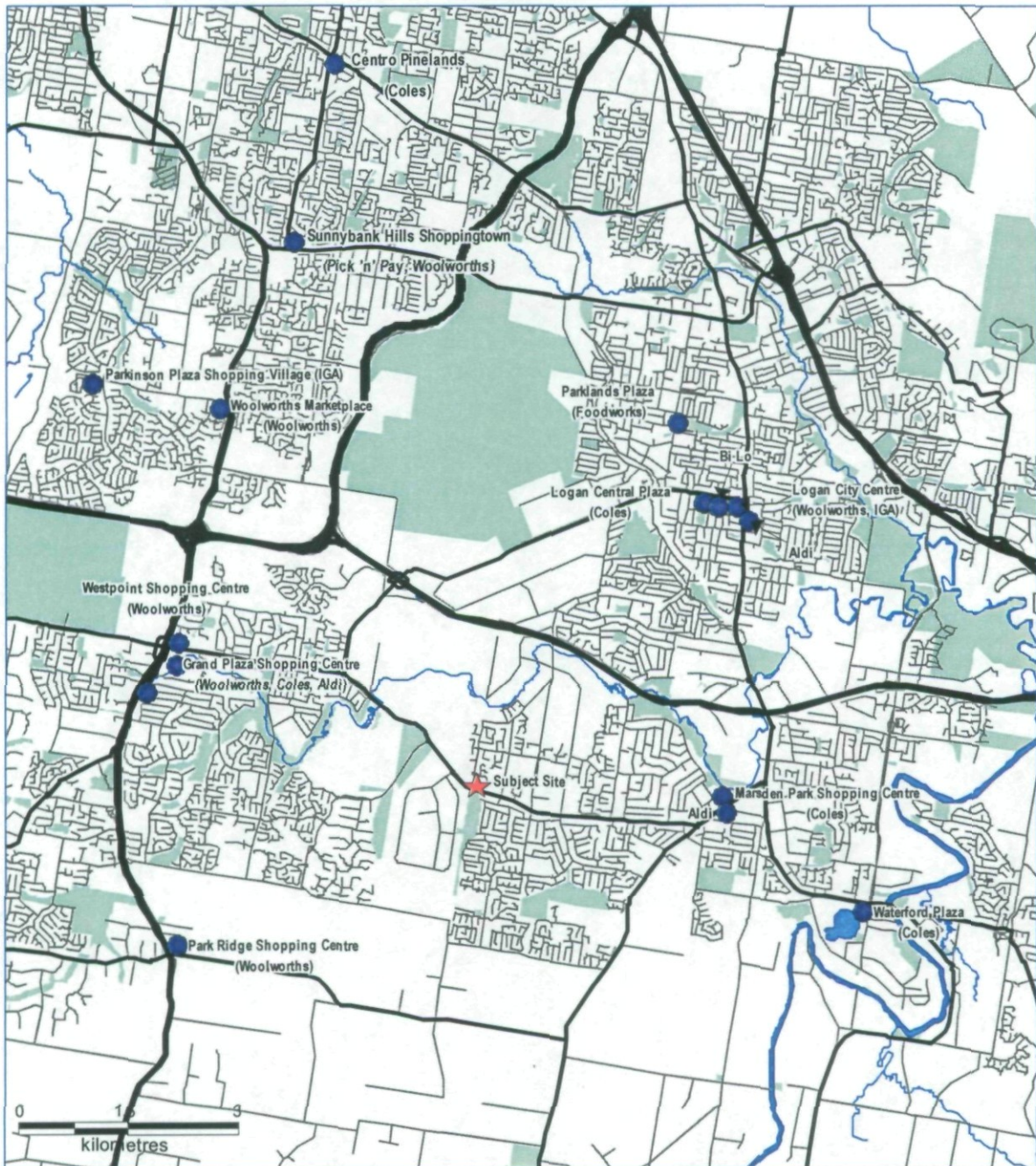
Table 2.1
Existing Supermarket Infrastructure

Centre	Location	Size	Tenants
Waterford Plaza	Corner Kingston-Beenleigh Road and Tygum Road, Waterford West	5,667 Sq M	Coles (2,600 Sq M) and 30 specialty stores.
Regency Plaza	Corner Mount Lindsay Highway and Vansittart Road, Regents Park	3,905 Sq M	Supa IGA (1,404 Sq M) and 30 specialty stores.
Sunnybank Hills Shoppingtown	Corner Compton Road and Calam Road, Sunnybank Hills	34,009 Sq M	Pick 'n' Pay (13,239 Sq M), Woolworths (4,546 Sq M), Overflow Discounters, Crazy Clark's and 76 specialty stores.
Centro Pinelands	Corner Beenleigh Road and Pinelands Road, Sunnybank Hills	5,898 Sq M	Coles (2,125 Sq M) and 40 specialty stores.
Parkinson Plaza Shopping Village	441 Algester Road, Parkinson	4,766 Sq M	Supa IGA (3,203 Sq M) and 13 specialty stores.
Aldi	38 Bourke Street, Marsden	Approx. 1,300 Sq M	Aldi
Aldi	392-396 Kingston Road, Kingston	Approx. 1,200 Sq M	Aldi
Bi Lo	32 Wilbur Street, Logan Central	Approx. 3,700 Sq M	Bi Lo
Woolworths Marketplace	2605, Beaudesert Road, Calamvale	5,448 Sq M	Woolworths (3,417 Sq M) and 20 specialty stores.

Source: PCA Shopping Centre Directory 2008, Conics

Figure 2.1 illustrates the location of the supermarket centres.

Figure 2.1 Existing Supermarket Infrastructure



2.3 PLANNED AND PROPOSED

Marsden Park Shopping Centre has an approval to expand to include a 3,800 Sq M full line supermarket, a 1,250 Sq M Discount Department Store and an extra 243 Sq M of specialty stores. The original approval to expand the centre had previously lapsed but an extension was granted until January 2010 to expand the shopping centre.

SouthWest1 currently has approval for a retail service centre of up to 1,000 Sq M with a shopping centre limited to 500 Sq M. An application has been lodged to extend this approval to include a 3,000 Sq M retail centre with 1,500 Sq M supermarket.

2.4 IMPLICATIONS

Supermarkets in the area are located along the major north-south roads of the Mount Lindesay Highway and Kingston Road. Residents surrounding the subject site have to travel to Browns Plains, Marsden or Logan Central to conduct their supermarket shop with no supermarket in their immediate area. The subject site is in a central position to these nodes and between the Mount Lindesay Highway and Kingston Road and as such will be able to better serve nearby residents.

The proposed development on the subject site will provide residents with a nearby centre for their retail and supermarket shopping needs trading to a local catchment.

The local area (extending from the Marsden industrial estate in the west to the suburb of Waterford West in the east and bounded by the Logan Motorway to the north), has the potential to be serviced by 4 full line supermarkets and an Aldi. These would be located on the subject site (1 proposed), Marsden Park (1 existing, 1 approved) and Waterford West (1 existing). The key issue is does this well defined area have the capacity to support this range of retail infrastructure.

Should the planned larger retail footprint (3,000 Sq M with a 1,500 Sq M supermarket) at SouthWest1 be approved then this combined with the subject site will see a distinct retail node created at Marsden. Whilst both these proposed developments may have supermarkets, the scale of the one proposed at SouthWest1 (1,500 Sq M) will cater to impulse/convenience/top up shopping needs rather than residents weekly/fortnightly supermarket shopping needs as that proposed for the subject site.

3.0 Consumer Research

3.1 INTRODUCTION

The following section describes the findings of the consumer research conducted from the 3rd to the 5th of April 2008. A further detailed analysis of the consumer research is attached in Appendix B with the questions contained in Appendix C.

3.2 CONSUMER RESEARCH

Enhance Management were commissioned to conduct a telephone survey of 180 people within a designated survey area (see Appendix D). The telephone surveys were carried out from the 3rd to the 5th of April 2008. The questions asked during the telephone interview are attached in Appendix C.

Consumer research was completed in order to assess the current and likely shopping patterns of residents surrounding the subject site. A number of households from a broad area defined by major roads, other supermarkets and the limit of urban development were targeted for the telephone survey.

Respondents were asked a variety of question such as where was their main supermarket or foodstore, the reasons for shopping there and the likelihood of shopping at the subject site. They were also asked to provide their street and nearest cross street so that their answers could be plotted on a mapped. These responses will be considered when defining the catchment for the proposed development.

Results from the consumer research indicate that 82% of the survey respondents were female with a further 82% being 35 years or older. The large number of female respondents is expected as they are generally the main shopper in the household. The majority of those surveyed (52%) came from families with children with 69% having a gross individual income less than \$1,000 per week. These results indicate that the area is primarily made up of families with children with modest incomes. The proposed shopping centre development will benefit this demographic as it will provide a greater level of convenience and increase competition which usually results in lower prices.

The two supermarkets which recorded the highest level of responses for the respondent's main supermarket shop were the Woolworths at Grand Plaza (31%) and Coles at Marsden Park (30%). Figures 3.1 and 3.2 provide a graphical representation of where the respondents conduct their supermarket shopping. These results illustrate that the respondents generally conduct their supermarket shop at their nearest centre. This is reinforced with the majority of respondents (53%) listing 'closer to home' as their main reason for conducting their supermarket shop at their main supermarket.

Results from figure 3.1 indicate that respondents prefer to shop at Woolworths (77 respondents) then Coles (58 respondents). Figure 3.2 provides an illustration of each centres likely trade area with the Marsden industrial estate providing a barrier to movement from east to west. Browns Plains attracted respondents from a larger area than Marsden Park which can be attributed to its greater selection of supermarkets (Coles, Woolworths and Aldi) and other stores than Marsden Park (Coles).

Respondents were also asked the likelihood of them conducting their supermarket shop at the subject site. Figure 3.3 illustrates which respondents were likely, unlikely and undecided on conducting their supermarket shop at the subject site. Areas in which there are a grouping of respondent's who are likely to conduct their supermarket shop at the subject site will have the capacity to be part of the main trade area for the subject site.

Of the 59% of respondents who were likely to shop at the subject site 97% of those respondents indicated that it would be their main supermarket destination. This indicates that they are willing to change their supermarket shopping behaviour from their current destination to the subject site. This may be due to a number of reasons such as the subject sites location and/or difficulty in accessing existing centres. With the majority of residents who are likely to shop at the subject site currently conducting their supermarket shop at Marsden Park this is reflective of these respondents being unsatisfied with the conditions at Marsden Park.

It should be noted that at the time this survey was conducted (April 2008) Westpoint Shopping Centre (which is adjacent to Grand Plaza) was anchored by a Food 4 Less store rather than its present Woolworths store. As such this centre nor the Woolworths supermarket does not figure in results.

Figure 3.1 illustrates the respondent's main supermarket shop

Figure 3.2 illustrates the respondent's main supermarket centre

Figure 3.3 illustrates the likelihood of respondent's shopping at the subject site

Figure 3.1 Main Supermarket Shop

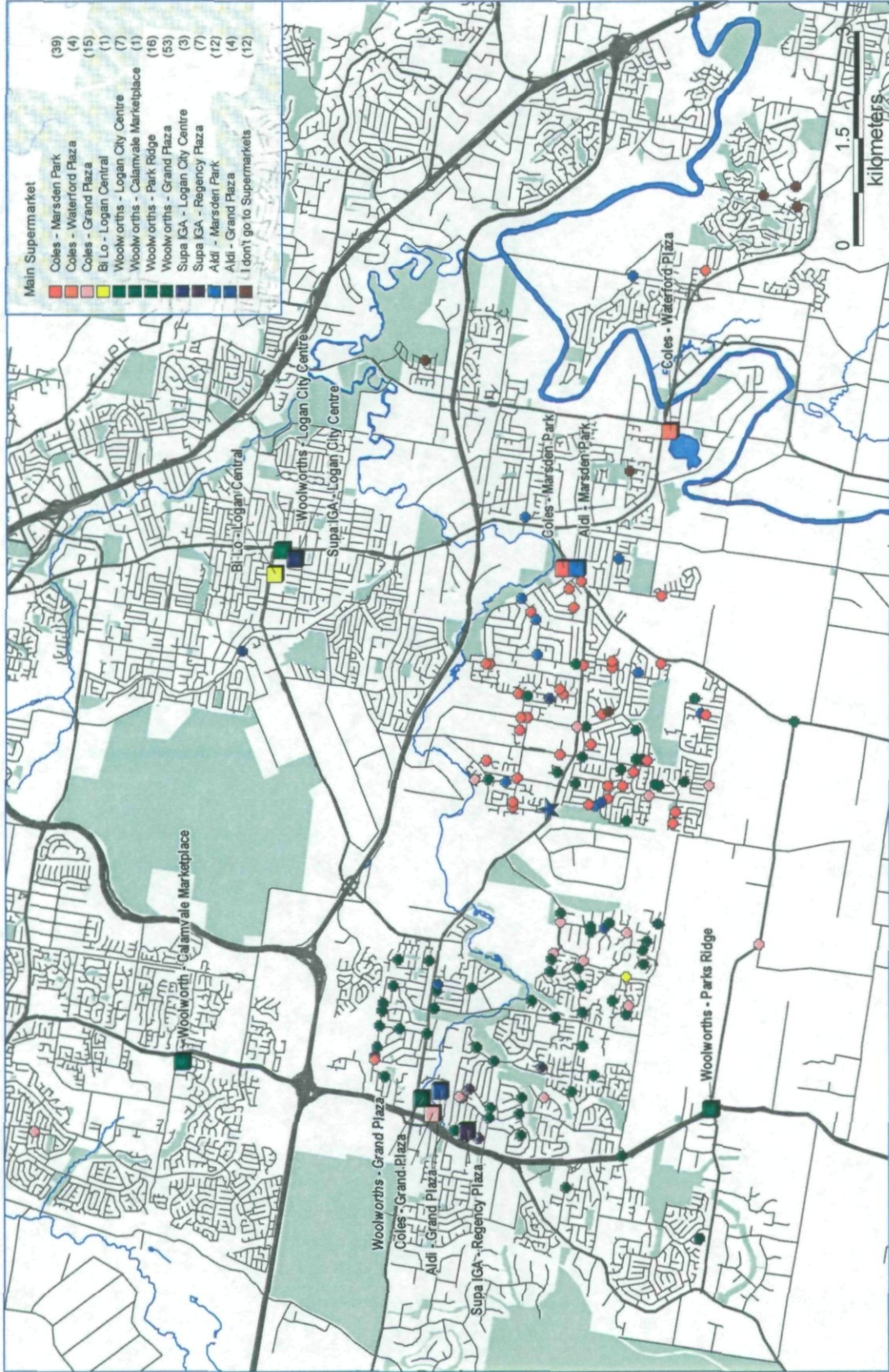


Figure 3.2 Main Supermarket Centre

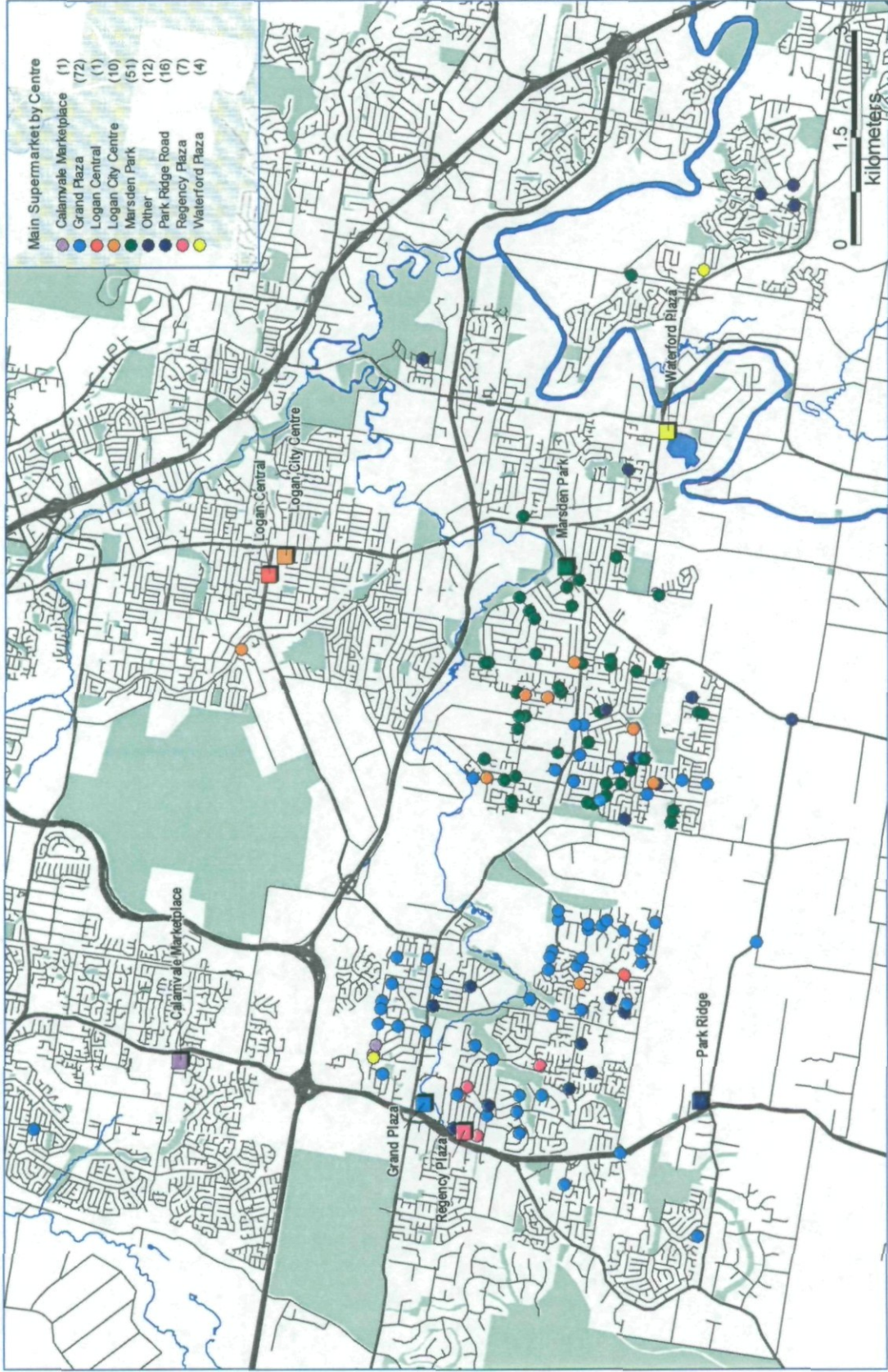
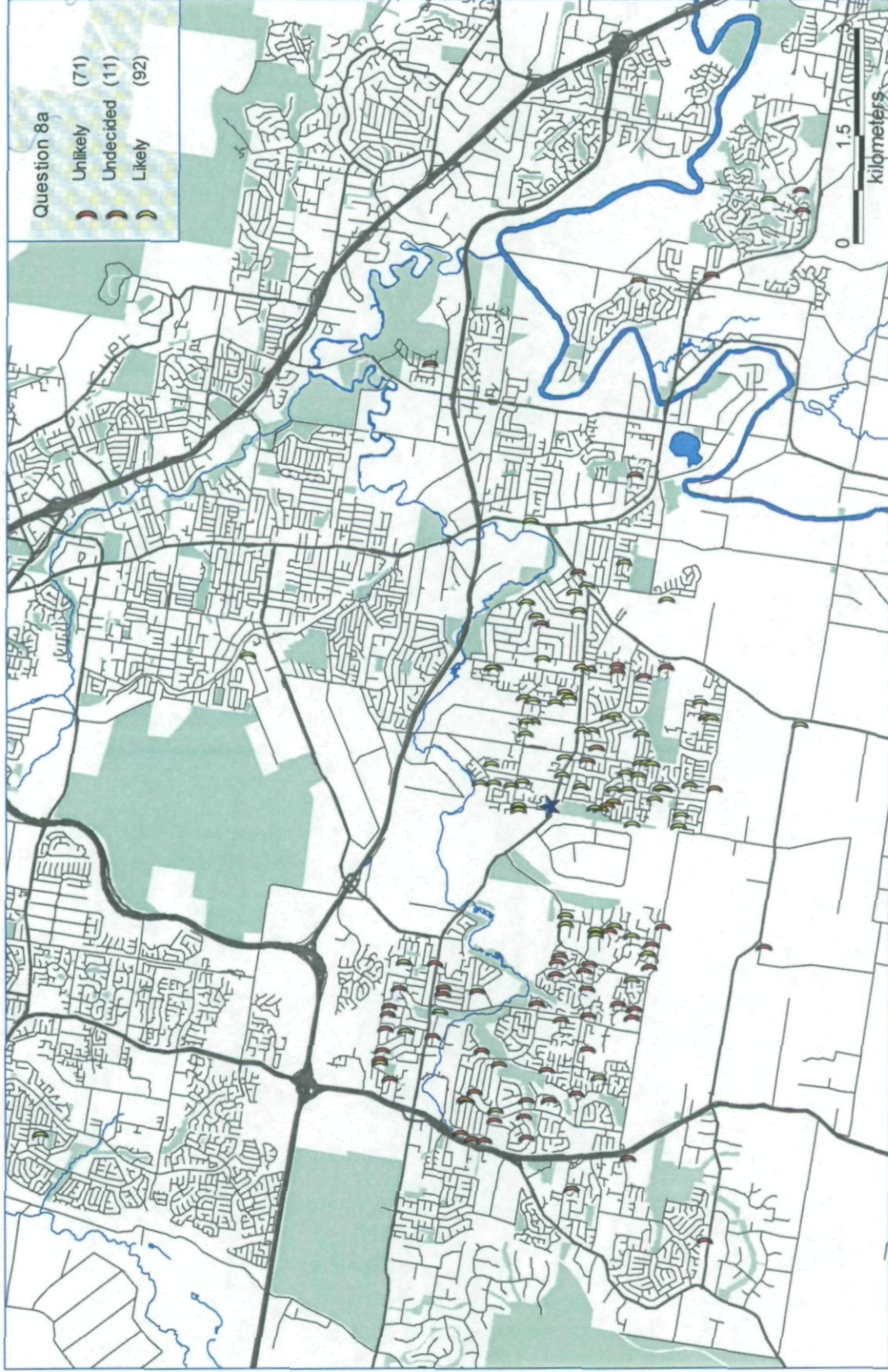


Figure 3.3 Likelihood of Shopping at Subject Site



3.3 IMPLICATIONS

The demographic profile of respondents is that of young families earning less than \$1,000 per week. This demographic will benefit from a supermarket centre on the subject site as it will increase competition and provide a higher level of convenience for nearby residents.

Each centre trades to a reasonably distinct local catchment. These catchments overlap each other meaning that *residents shop at a variety of different supermarkets and supermarket centres. Other nearby supermarkets such as those at Grand Plaza and Park Ridge also have overlapping catchments, meaning that residents of a certain area will shop at a number of different supermarkets.* This is confirmed by the consumer research with 82% indicating that they conduct their supermarket shop at more than one supermarket.

The number of respondents likely to conduct their main supermarket shop at the subject site (57%) is reflective of the appeal of the subject sites location and/or they are unsatisfied with certain aspects of the existing retail network. As such Marsden Park is assessed as an unpopular centre with a high level of respondents who shop there indicating that they will change their patronage to the subject site. It should be noted that almost all of these respondents are located within the catchment of the subject site and this represents only part of the catchment for Marsden Park, which extends to the east. Based on the results of the survey Conics estimates that 39% of convenience expenditure (or \$31 million) is leaving the catchment. Much of this escape expenditure is directed towards the supermarkets at Browns Plains.

4.0 Trade Area Delineation

4.1 INTRODUCTION

This section provides an analysis of the potential trade area for the proposed supermarket anchored shopping centre on the subject site. The trade area is indicative only, and based on the Australian Bureau of Statistics (ABS) Collection District (CD) boundaries.

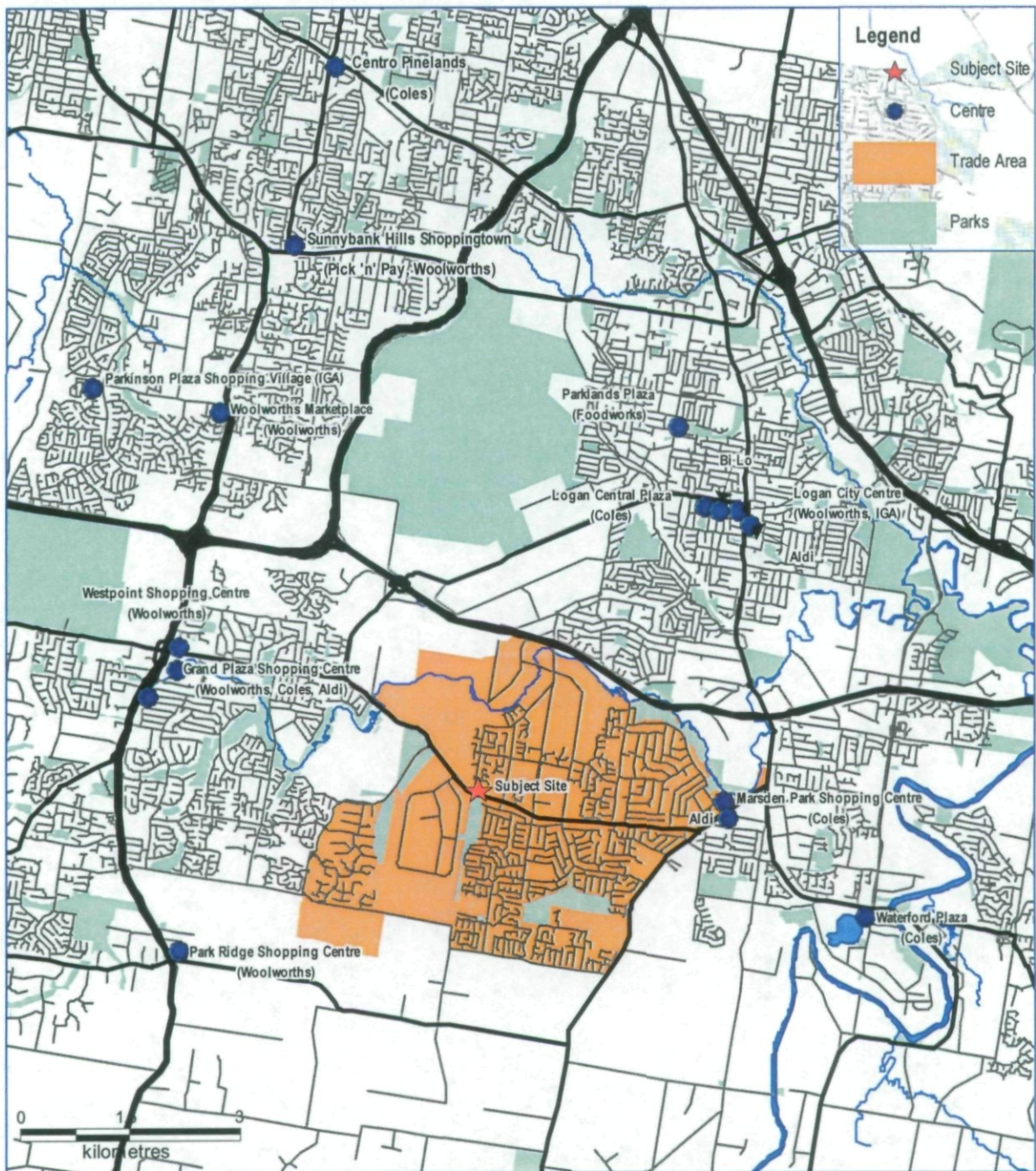
4.2 TRADE AREA DELINEATION

The trade area for the proposed supermarket anchored centre on the subject site is defined by a number of physical and psychological boundaries. This includes the Logan Motorway to the north, Kingston Park and Chambers Flat Road to the east and the Marsden industrial estate to the west. The industrial estate provides a clear line of separation for the residential areas of Marsden and Crestmead in the east to Browns Plains in the west. The layout of the road network also allows residents to the east of Bayliss Road in Heritage Park to have relatively easy access to the site and as such these residents will also form part of the trade area.

Results from question 8 of the consumer research regarding respondent's likelihood of patronizing the subject site were also examined. These responses further reinforced the defined trade area with a number of 'likely' and 'very likely' responses falling within the confines of the trade area.

There is currently only one other supermarket within the defined trade area. It is the Coles at Marsden Park (Aldi is not considered to be a full line supermarket due to its different product offer). The Coles at Marsden Park is expected to share part of its catchment with the subject site as well as trade to the east of the identified catchment.

Figure 4.2 Trade Area Delineation



4.3 IMPLICATIONS

The trade area for the subject site is generally defined by main roads and the Marsden industrial area. This results in a relatively tight catchment. Results from the consumer research regarding respondent's likelihood of patronizing the subject site help to reinforce the defined catchment. Residents of the trade area are also expected to patronize other centres outside of the trade area such as Grand Plaza at Browns Plains.

The subject site and Marsden Park Centre will share the defined catchment. This will result in these centres competing for consumers which will benefit the community as competition will likely lead to lower prices. Marsden Park has a trade area that extends to the east of that centre.

Inflow will also come from outside of trade area such as industrial estates (as people travel home from work) and residents outside the trade area who will access the site as it provides easier and more convenient access than other centres such as Browns Plains.

5.0 Trade Area Characteristics

5.1 INTRODUCTION

This section provides an analysis of the key demographic features and population projections for the defined trade area as well as average annual household convenience expenditure.

5.2 KEY DEMOGRAPHIC FEATURES

Key demographic features include:

Age Distribution:

The demographic data indicates that the trade area (29.0%) has a higher proportion of residents aged less than 15 years compared to Logan with 24.0% and the Queensland average of 20.7%. The data also reveals that the proportion of residents aged over 55 years in the trade area (4.8%) and Logan (7.3%) is significantly less than that of the Queensland average of 12.4%.

This indicates that the trade area is predominately made up of young families. A supermarket on the subject site will provide a higher level of convenience than what is presently on offer benefiting families who are often constrained by time.

Dwelling Type:

The most common type of dwelling throughout the trade area is a separate house with 97.0% with Logan having 86.1% which are both higher than the Queensland average of 79.5%.

Household Structure:

There are a large proportion of couple families with children in the trade area (49.0%) and Logan (46.9%) compared to the Queensland average of 43.3%. This characteristic is indicative of an area with a number of families.

Families are often constrained by time and would benefit from the level of convenience and accessibility that a supermarket centre on the subject site would bring.

Household Ownership:

61.3% of households in the trade area are either being purchased directly or fully owned compared to 64.8% in Logan and 65.4% in Queensland. The trade area also has a higher proportion of rented households with 36.0% compared to 32.3% and 31.1% respectively for Logan and Queensland.

Irrespective of household ownership, residents conduct weekly and/or fortnightly supermarket shops and will benefit from the increased offer and price competition that a supermarket on the subject site will provide.

Average Household Income:

The average annual household income in September 209 dollars in the trade area is \$6,810. This figure is below the Logan average of \$67,380 and the Queensland average of \$69,001.

These incomes are indicative of households where only one member of the household is working which may be due to the number of young families in the area. Alternatively, the figures may indicate that employment in the region does not command the same level of remuneration as other areas in Queensland. With lower than average incomes

residents of the trade areas will benefit from the proposed development as it will increase competition in the area resulting in lower prices for residents weekly/fortnightly supermarket shop.

The low household incomes in the area and number of young families are broadly in line with survey responses. This validates the survey collection.

5.3 POPULATION PROJECTIONS

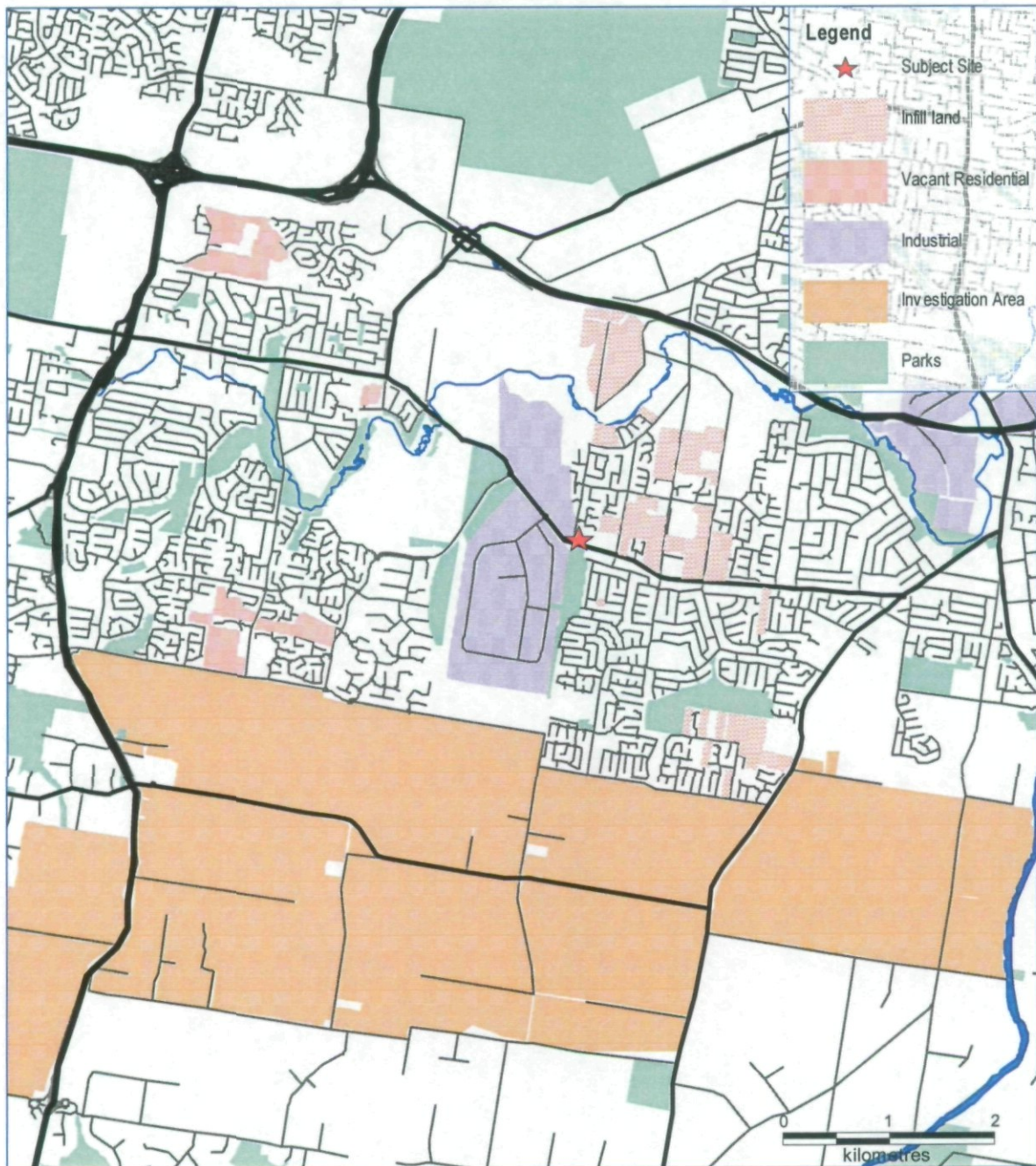
Table 5.1 represents the ABS population; showing the variance between the usual resident population in occupied private dwellings (OPD) count and Estimated Resident Population (ERP) values. The ABS count refers to the count on Census night which is inclusive of residents away from home on Census night; excluding tourists. The ABS ERP alternatively, refers to the current (ERP) which is updated regularly.

Table 5.1		
2006 Population		
	Count (OPD)	ERP
Population		
Trade Area	19,593	21,381
Logan	164,340	178,462
Household Size (Occupied Dwellings)		
Trade Area	3.14	
Logan	2.87	
Households (Occupied Dwellings)		
Trade Area	6,237	6,806
Logan	57,265	62,186

Source: 2006 ABS Census
 private occupied dwellings
 ERP: ABS Estimated Resident Population (inclusive of residents away from home on Census night / not inclusive of tourists)

Two different methodologies have been used in order to project the future population growth in the catchment. Both methodologies identified land zoned as Residential 600 under the Logan Planning Scheme 2006 which has yet to be subdivided based on aerial photos. These lots were generally in the form of rural residential lots or vacant land. Existing uses on the blocks were also taken into account with lots with uses such as schools assumed to not be subdivided for residential uses at any time in the future. A total of 111.8 ha of future residential land supply land has been identified in the trade area through this process. Figure 5.1 illustrates the location of the future residential land supply in the trade area.

Figure 5.1 Future Population Growth



The first methodology calculated the amount of land available (111.82 ha) and assumes that of this amount 75% will be residential lots with the other 25% being for other uses such as roads and open space. An average lot size of 600 Sq M (consistent with the Residential 600 zoning) was then used in order to determine the total number of possible lots. This methodology resulted in approximately 1,398 lots of future residential land supply being identified.

The second methodology examined each individual property of the identified 111.8 ha and the nearby residential subdivision patterns. This methodology takes into account the development of neighbouring properties and the likely road network in order to calculate the future subdivision pattern. This methodology returned approximately 1,120 future residential lots which could be developed. Of the two methodologies the second one is considered to be the more conservative approach and as such has been used in all relevant projections.

Using ABS Building approvals data from December 2006 to June 2008 in the trade area the average number of building approvals per year over this time frame was approximately 120 dwellings. Therefore assuming a constant take up rate of 120 dwellings per year there is approximately 10 years of residential land supply in the catchment.

Table 5.2 provides population projections for the trade area and Logan.

Table 5.2 Population Projections					
	2009	2011	2013	2016	2021
Population					
Trade Area	21,976	22,614	23,247	24,183	24,732
Logan	275,372	285,566	298,086	316,866	351,382
Household Size					
Trade Area	3.12	3.10	3.09	3.07	3.03
Logan	2.85	2.84	2.82	2.80	2.77
Households					
Trade Area	7,046	7,286	7,526	7,886	8,163
Logan	96,650	100,715	105,674	113,112	126,956

Source: 2006 ABS Census, Conics
Logan 2011 - 2026 PIFU medium series

The population of the trade area is projected to increase from approximately 21,976 people in 2009 to approximately 22,614 people in 2011. This is an increase of approximately 638 people or 2.9% over 2 years. The population is projected to increase to approximately 24,183 people in 2016, an increase of approximately 1,569 people from 2011 or approximately 6.9% over 5 years. As the population increases so too does the demand for supermarkets and other forms of retail.

Located just outside the trade area is the Park Ridge Major Development Area. The Logan City Council has a vision that this area will be able to support an additional 30,000 people over the next 20 years. Whilst it is expected that this new community will be supported by the relevant infrastructure (such as retail centres) this population growth outside of the trade area may also generate some additional inflow expenditure for the subject site.

5.4 EXPENDITURE CHARACTERISTICS

Table 5.3 is based on the average household expenditure in the 2003/04 ABS Household Expenditure Survey. The expenditure estimates are derived by assessment of the estimated household income of the trade area with comparison to the Logan and Queensland averages.

Table 5.3			
Household Expenditure Characteristics			
	Trade Area	Logan	QLD
Convenience			
Food and non-alcoholic beverages *	\$131.62	\$137.37	\$138.81
Alcohol for consumption off licensed premises	\$17.10	\$17.77	\$17.93
Books, newspapers, magazines and other printed material	\$9.47	\$9.84	\$9.94
Cleaning and Related *	\$10.86	\$11.29	\$11.40
Dry cleaning and related	\$0.70	\$0.78	\$0.80
Hair and personal services	\$7.25	\$7.89	\$8.06
Lottery tickets and lotto	\$4.11	\$4.14	\$4.15
Medicines, pharmaceutical products and therapeutic appliances	\$13.69	\$14.79	\$15.07
Personal care *	\$2.58	\$2.82	\$2.88
Stationery equipment	\$4.43	\$4.68	\$4.74
Tobacco products *	\$15.97	\$16.03	\$16.04
Toiletries and cosmetics	\$12.04	\$12.79	\$12.98
Photographic film and chemicals (including developing)	\$1.43	\$1.46	\$1.46
Weekly Sub Total	\$231.25	\$241.65	\$244.25
Annual Sub Total	\$12,057.40	\$12,599.80	\$12,735.40
Derived Supermarket Expenditure (categories marked* plus 7.5% for general merchandise)			
Weekly Sub Total	\$173.11	\$180.07	\$181.81
Annual Sub Total	\$9,025.87	\$9,388.89	\$9,479.64

Source: Conics, ABS

Note: All figures in September 2009 Dollars

Table 5.3 indicates the average annual amount of convenience expenditure conducted by residents of the trade area is \$12,057 which is lower than both the Logan average of \$12,599 and the Queensland average of \$12,735.

Table 5.4 shows the household convenience expenditure potential in the trade area and Logan.

Table 5.4
Average Annual Household Convenience Expenditure

	Trade Area	Logan		
Average household convenience expenditure	\$12,057	\$12,600		
Convenience Expenditure Potential (\$m)				
	2009	2011	2013	2016
Trade Area	\$85.0	\$87.9	\$90.7	\$95.1
Logan	\$1,217.8	\$1,269.0	\$1,331.5	\$1,425.2

Source: Conics, all figures September 2009 dollars

The total current estimated convenience expenditure potential in the trade area is approximately \$85.0 million. This is estimated to increase to approximately \$87.9 million in 2011 and \$95.1 million in 2016. As expenditure increases so too does the convenience floorspace demand. As such a supermarket anchored centre on the subject site will cater to both current and future residents of the trade area.

5.5 IMPLICATIONS

The demographic profile of the trade area is that of young families with below average household incomes. Residents of the trade area will benefit from the proposed supermarket development as it will provide them with a greater level of convenience and also provide more competition which is likely to result in cheaper prices.

Based on an examination of possible subdivision opportunities, the trade area can support an additional 1,120 dwellings until capacity is reached. This will see the population grow from its current level of 21,976 people in 2009 to 22,614 in 2011 and 24,183 in 2016.

As a result of population growth, convenience expenditure in the trade area is predicted to increase from approximately \$85.0 million in 2008 to approximately \$87.9 million in 2011 and \$95.1 million in 2016. The proposed supermarket on the subject site will cater to the predicted growth in the trade area as well as the current demand levels.

6.0 Social Impact Analysis

6.1 INTRODUCTION

This section provides an overview of the existing and planned social and economic environments for the proposed supermarket centre development.

6.2 DEFINITION OF SOCIAL AND ECONOMIC IMPACT

Effective social impact assessments (SIA's) involve an understanding of demographics, economic and social indicators, and the values of communities and cultures.

By "social impacts" we mean the consequences to human populations of development that alter the ways in which people live, work, play, relate to one another, organise to meet their needs and generally cope as members of society. The term also includes cultural impacts involving changes to the norms, values, and beliefs that guide and rationalise their cognition of themselves and their society. In this instance, however, we define social impact assessment in terms of efforts to assess or estimate, in advance, the social consequences and community impacts that are likely to follow from proposed specific development.

The purpose of an SIA is to provide an indication of the ability of a community or group to adapt to changing conditions; define the problems or clarify the issues involved in a proposed change; anticipate and assess impacts on the quality of life; illuminate the meaning and importance of anticipated change; identify mitigation opportunities or requirements; and advise communities and other stakeholders on how to comply with regulations and policies.

The social and economic impact of any development is the effect it has on people. Such effects include changes to peoples way of life (how they live, work, play and interact), their cultural traditions (shared beliefs, customs and values), economic issues (employment, financial and business impact) and their community (population structure, cohesion, stability and character).

A Socio-Economic Impact Assessment can be defined as "the systematic appraisal on the day to day quality of life of persons and communities whose environment is affected by the development or policy change." (Burdge 1985:1).

6.3 ECONOMIC ENVIRONMENT

6.3.1 Economic Impacts

The proposed shopping centre development will enhance the current level of retail on offer in the area and service local residents. As a result existing retail in the area may experience an economic impact due to the added competition a new shopping centre will bring to the market. The proposed development may also act as a catalyst for existing operators and developments to improve their operations and product offer to the community.

The increasing population of the area will also generate increased demand for the local retail facilities such as those proposed for the subject site. The economic impacts will be discussed in more detail in the following section.

6.3.2 Employment

With the development of proposed shopping centre on the subject site, additional employment opportunities are expected to evolve during the construction phase, and at the completion of the development within the proposed uses of the retail. At a rate of 1 employee per 25 Sq M of GFA, the total ongoing employment anticipated to be generated by the proposed shopping centre development is approximately 184 full-time equivalent jobs.

6.3.3 Investment

The development of the subject site and investment in it is expected to provide an injection for the local economy both directly and indirectly. Employment opportunities will be created during the construction phase for the construction industry from trades' people to labourers, to landscaping from earthmovers to gardeners. During the construction phase it is expected that some materials will be purchased and supplied locally and after completion there will be opportunities for retail employees.

Investment into the development will have both direct and indirect economic and financial injections into the community.

6.4 SOCIAL ENVIRONMENT

6.4.1 Community Networks

The development will strengthen the existing retail facilities in the area and is anticipated to improve the quality and quantity of facilities for social interaction. A shopping centre can act as central point for social interaction particularly for stay at home parents who may lack social contact with other adults. Without a local centre in the area surrounding residents will have to travel a greater distance to other centres in order to build a social network.

The subject site will also be the most convenient centre for surrounding residents to conduct their supermarket shop.

6.4.2 Public Realm

The subject site is not listed as a heritage site. The development will provide high-quality public facilities, and the development is not considered to be an "overdevelopment" in the area. The proposed development of the subject site will be in line with the general amenity in the area with the existing service station and retail uses as part of the nearby industrial development on the other side of 5th Avenue.

6.5 COMMUNITY INFRASTRUCTURE

6.5.1 Human Services Facilities

It is not anticipated that the proposed shopping centre will adversely affect the supply of community support, welfare or health services in the region as none of these uses are currently located or proposed for the subject site.

6.5.2 Access

Due to the necessary nature of supermarket shopping it is expected that council will provide a nearby bus stop allowing residents to access their closest supermarket centre through public transport. As such it is considered that the development is likely to increase access to public transport in the area.

6.6 SOCIAL AND ECONOMIC AFFECTS OF THE PROPOSED DEVELOPMENT

The potential effects of the proposed development on elements forming the economic and social fabric of Marsden and its surrounding communities are summarised in Table 6.1.

Logan City Council - Assessment of Social and Economic Impact of Developments, Checklist of Social and Economic Issues

Table 6.1 - Marsden Retail

Economic Impact	Criteria	Effect				
		Positive	Uncertain / Neutral	Negative	Net Total	
1	Economic Impacts	Increases or decreases retail and other services within the local area	+			+
		Increases or decreases facilities within the local area	+			+
		Better uses or makes redundant existing infrastructure		0		0
		Impact on existing economic land uses (commercial, tourism etc)		0		0
2	Employment	Improves or reduces access to employment	+			+
		Increases or decreases long term jobs (temporary or permanent)	+			+
		Impact on skills/education	+			+
		Safeguards or threatens existing jobs		0		0
3	Additional Information for Industrial, Commercial or Retail developments	Jobs created directly from the development				
		• Construction Phase	+			+
		• Ongoing Operation (approximately 184 jobs)	+			+
		Investment in the development				
		• Construction (excluding land value)	+			+
• Local Investment	+			+		
Social Impact	Criteria	Effect				
		Positive	Uncertain / Neutral	Negative	Net Total	
4	Community Networks	Provides or reduces facilities or opportunities for social interaction	+			+
		Improves or reduces community identity and cohesion	+			+
		Improves or reduces existing residential amenity	+			+
		Creates or removes physical barriers between homes and community facilities	+			+
		Impacts on disadvantaged social groups		0		0
		Benefits or displaces disadvantaged groups		0		0
5	Public Realm	Consolidates or dislocates existing social or cultural networks		0		0
		Safeguards or threatens heritage sites or buildings, or archaeological sites		0		0
		Makes available/enhances or detrimental to public places/open space	+			+
		Provides or displaces public facilities	+			+
		Avoids or exhibits overdevelopment/large scale buildings		0		0
Significant positive or negative public response in submissions/meetings		0		0		
Community Infrastructure	Criteria	Effect				
		Positive	Uncertain / Neutral	Negative	Net Total	
7	Human Service Facilities	Increases or decreases supply of:				
		• community support/welfare services		0		0
		• child care, health or educational services		0		0
		• special services for high need/disadvantaged groups		0		0
		Decreases or increases demand for:				
		• community support/welfare services		0		0
		• child care, health or educational services		0		0
		• special services for high need/disadvantaged groups		0		0
		Increases or decreases in the choice of local shopping facilities	+			+
		Increases or decreases local recreation or leisure facilities		0		0
8	Access	Decreases or increases distance from homes to local community facilities and service	+			+
		Improves or reduces public transport services or access to such services	+			+
		Improves or reduces disabled access to local facilities	+			+
		Improves or reduces access by cycle to local facilities	+			+
		Improves or reduces pedestrian access to local facilities	+			+

6.7 CONCLUSION

The establishment of a supermarket anchored shopping centre on the subject site is considered to be a good fit with the needs of the community and will service the areas of Marsden Park, Crestmead and Heritage Park. It will also be the most convenient centre for nearby residents improving their access to retail facilities.

The construction phase of the development will provide 84 jobs to the community. Upon completion the supermarket anchored centre is also expected to provide approximately 184 EFT jobs. The retail uses on site will create employment opportunities for 'employment poor' groups including women and young adults.

The proposed development will also service the supermarket and convenience needs of residents as well as nearby workers of the industrial estate as they conduct their supermarket shop to/from work.

7.0 Regional Retail Assessment

7.1 INTRODUCTION

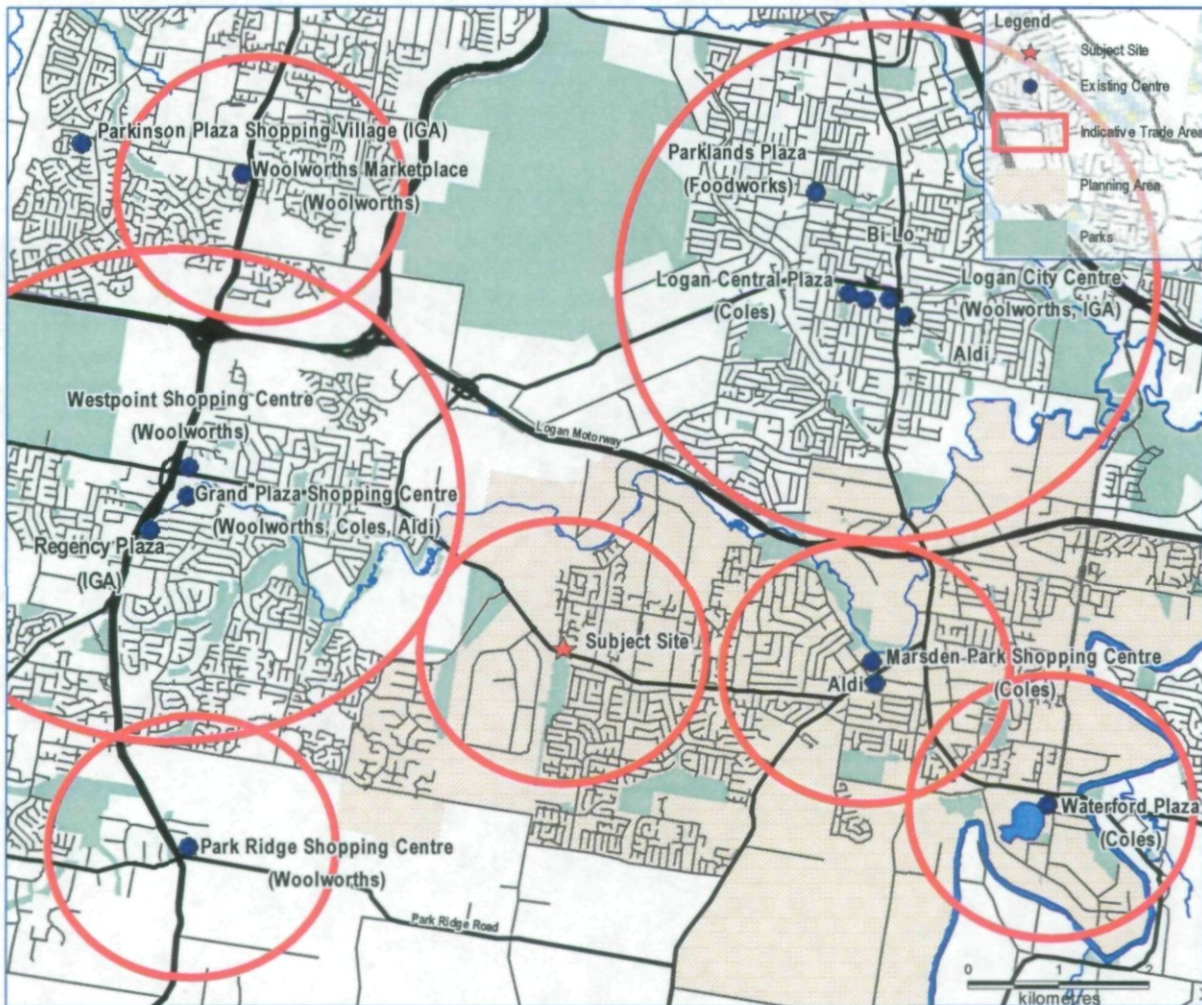
The following section provides a regional retail assessment of nearby centres and their indicative trade areas in order to identify any gaps in the existing retail network.

7.2 REGIONAL RETAIL ASSESSMENT

There are a number of existing supermarket centres surrounding the subject site in areas such as Marsden Park, Browns Plains, Logan Central and at Waterford West. Each centre will have its own distinct trade area based on the local road network and nearby residents.

Whilst each individual trade area for every centre will vary based on a number of factors (such as barriers to movement and retail offer) these centres will trade to nearby residents. Figure 7.1 illustrates surrounding centres and their trade areas. It should be noted that these trade areas are indicative only. For example Browns Plains and supermarkets at Logan Central will have a larger trade area due to the increased retail on offer at these locations.

Figure 7.1 Indicative Trade Areas



As illustrated in figure 7.1 the indicative trade areas for existing centres result in a gap around the subject site. The proposed development on the subject site will trade to surrounding residents fulfilling the need for a supermarket in the area.

In a broader sense, the planning area which extends to the south of the Logan Motorway, west of the Logan River and east of the Marsden industrial estate has a population of approximately 36,000 people and currently two full line supermarkets located at Marsden Park Shopping Centre and Waterford Plaza (which also trades outside of this area to the east).

This planning area has been chosen as it forms a distinct urban residential area that is bounded by features that usually shape supermarket patronage patterns (and therefore catchments).

Based on general rates of provision of 8,000 people for a full line supermarket the area can currently support up to four full line supermarkets. This area is therefore considered to be underserved and an expanded retail (supermarket) network is required. A supermarket on the subject site and the approved supermarket as part of the Marsden Park Shopping Centre expansion will bring the number of full line supermarkets in this area to four which is in line with rates of provision.

The 8,000 person benchmark has evolved in line with supermarket patronage patterns. As a generalisation 8,000 people represents 3,000 households which in turn generate about \$36 million in convenience retail expenditure. 70% of this amount (or \$25 million) is typically directed towards supermarkets and this level of expenditure will support a full line supermarket of 3,200 Sq M trading at close to \$8,000 per Sq M which is at (or above) industry averages.

7.3 IMPLICATIONS

A full line supermarket on the subject site will form part of the regional retail offer of the area. It will trade to nearby residents who currently travel to other centres outside of their local area. Existing centres will continue to trade to their catchments with the subject site catering to local residents without a nearby full line supermarket.

The planning area (south of the Logan Motorway, west of the Logan River and east of the Marsden industrial estate) has a population of 36,000 people and this will sustain a network of four supermarkets. This network will consist of supermarkets at Marsden Park (2), Waterford West and the subject site. The subject site and the approved additional supermarket in Marsden Park are therefore justified as this is an appropriate planning response to the size of the defined area.

8.0 Need and Impact Assessment

8.1 INTRODUCTION

This section assesses the economic need and impact for the proposed supermarket development. This section will also address the impact on existing centres within and surrounding the proposed trade area.

8.2 NEED ASSESSMENT

There are three types of need that underpin the proposed supermarket development – community need, economic need and planning need.

Community Need

Community need relates to how nearby residents will benefit from the proposed supermarket development on the subject site. The proposed development will provide an alternative supermarket option for residents and benefits in relation to increased choice, point of difference, competitive pricing and product offer. Generally lower prices are expected to occur as a result of increased competition.

A supermarket on the subject site would also benefit the community through decreasing travel times and subsequently traffic to other centres located outside of the trade area. The community has an expectation that a certain level of amenity with regard to shopping centre infrastructure is provided in their local area. Currently the required shopping infrastructure is not present with residents currently travelling to centres at Browns Plains and Marsden Park. A shopping centre on the subject site will provide this necessary infrastructure in the local area.

The proposed location of the supermarket centre will benefit residents of the defined trade area in terms of convenience and accessibility with established travel patterns (along Browns Plains Road) and transport routes of the surrounding residents.

Respondents to consumer research undertaken who are located in the trade area (as well as outside of) have indicated a willingness (57% either 'likely' or 'very likely') to conduct their supermarket shop at the subject site. This demonstrates need from a community perspective for a supermarket on the subject site. It should be noted that almost all of these respondents are located within the catchment of the subject site and this represents only part of the catchment for Marsden Park, which extends to the east. Based on the results of the survey Conics estimates that 39% of convenience expenditure (or \$31m) is currently leaving the catchment. Much of this escape expenditure is directed towards the supermarkets at Browns Plains.

Community benefit also arises from employment during construction and the employment required for the centres operation. Estimated employment will provide for an approximate total of 184 full-time, part-time and casual positions and approximately 84 (comprised of 50 onsite and 34 offsite) construction jobs.

Economic Need

The current total population of the defined trade area is approximately 21,976. The total population of the trade area is expected to increase to approximately 23,247 in 2013, an increase of 1,271 over 4 years or approximately 1.3% per year.

The current total derived convenience retail expenditure potential for the defined trade area is estimated to be \$80.5 million and is projected to increase to \$90.7 million in 2013, an increase of \$10.2 million over 4 years. A population of 21,976 people with \$85.0 million in household convenience expenditure will support two supermarket anchored shopping centres and an Aldi.

This expenditure (\$85.0 million) is only part of the expenditure available to Marsden Park as the trade area for that centre extends to the east of the trade area for the subject site.

In a broader sense, the area south of the Logan Motorway, west of the Logan River and east of the Marsden industrial estate has a population of approximately 36,000. This means that the catchment for Marsden Park is split east (14,000 people) and west (22,000 people). The eastern part of the catchment is shared with Waterford West and the western part of the catchment is has 39% of patrons shopping at Browns Plains. The subject site will have negligible impact on the eastern part of the Marsden Park catchment and is expected to recapture a large portion of this identified escape expenditure.

Increasing household growth and convenience expenditure is also an indicator of increased demand for supermarkets that cater to the changing needs of local residents. The proposed supermarket anchored centre on the subject site will provide increased opportunity for local residents in terms of choice of supermarket and product offer, as well as convenience. With the proposed development injecting a new level of competition in the market it may result in a significant impact on existing operators.

Planning Need

From a planning perspective the subject site is considered to be well located as it will create a retail node as it is adjacent to planned retail uses as part of under construction industrial land at SouthWest1. This retail node will cater to local employment within the current and under construction industrial estates as well as nearby residents.

The broader area (south of the Logan Motorway, west of the Logan River and east of the Marsden industrial estate) has a population of 36,000 people and this will sustain a network of four supermarkets. This network will consist of supermarkets at Marden Park (2), Waterford West and the subject site. The subject site and the approved additional supermarket in Marden Park are therefore justified as this is an appropriate planning response to the size of the defined area.

8.3 IMPACT ASSESSMENT

The following assesses the economic impact of the proposed 4,600 Sq M supermarket anchored shopping centre on the subject site.

2011

In 2011 in the proposed developments first full year of operation it is expected to turnover approximately \$32.0 million. This is expected to comprise of approximately \$29.0 million from the trade area and \$3 million in inflow expenditure from various sources such as residents outside the trade area, passing traffic and nearby employment.

The closest centre to the subject site is the Marsden Park Shopping Centre. Based on a market share analysis Marsden Park Shopping Centre currently has a 50% to 55% market share compared to supermarkets at Grand Plaza which have 30% to 35%.

One possible impact scenario would see the subject site capturing much of the trade currently directed towards Browns Plains (currently \$31m) with Marsden Park continuing to trade close to current levels. This would see minimal impact (5% to 10%) on Marsden Park and it is assessed for this to occur a redevelopment/revamp of this centre would need to take place, otherwise the level of impact will be larger as patrons are attracted to the newer centre on the subject site. In the centres first year of operation the supermarkets at Browns Plains are expected to be impacted by 5% to 7%. Park Ridge Shopping Centre is expected to be impacted by 2% to 3%. Logan City Centre is expected to be impacted by 1% to 2%. These impacts are considered minimal and will not affect these centres ability to trade at viable levels and are expected to be partly offset by local growth.

Another impact scenario will see another supermarket in Marsden Park as well as the subject site, this will see the broader area serviced by four full line supermarkets. This network has the potential to recapture expenditure being lost to centres such as Beenleigh, Browns Plains and Woodridge. The local retail network would collectively trade at industry averages with any variations due to competitive positioning. Under this scenario, other centres presently capturing trade from the local area (Woodridge and Browns Plains) may see an impact of up to 10% on convenience retailers as escape expenditure is recaptured. These impacts will not affect these centres ability to trade at viable levels.

It is not possible to determine the likelihood of either scenario as this outcome rests with the owners of Marsden Park. In either case the impacts are not unreasonable and indicate the level of demand for a new supermarket anchored centre.

2013

By the subject sites third year of operation it is expected to increase its turnover to approximately \$33.0 million through the projected growth in the trade area. This growth is also expected to alleviate any impacts on Grand Plaza, Park Ridge Shopping Centre and Logan City Centre. As mentioned previously the level of impact upon Marsden Park Shopping Centre will be dependant upon the centres response to the proposed development. It is expected that a prudent owner of Marsden Park shopping centre will have reinvested into the centre in order to minimise the impacts from the proposed centre.

Proposed Uses

Should a 1,500 Sq M supermarket and a similar level of retail uses be approved as part of the SW1 development a larger retail precinct will be formed. Both centres will cater to distinct markets with SW1 focused on business/worker markets and the subject site catering to the chore retail needs of residents. These differing functions mean that there will be no material impact on either centre by the other.

8.4 CONCLUSION

The subject site is well positioned between the shopping centre nodes of Browns Plains and Marsden Park. The proposed shopping centre development will combine with the planned retail on offer in the industrial estate which will see another retail node created in Marsden, benefiting nearby residents and the local employment base.

The identified trade area has a population of approximately 21,976 growing to approximately 22,614 in 2011. This equates to approximately \$87.9 million of convenience retail expenditure in the trade area in 2011. With a population over 22,000 people the trade area can support the subject site and part of the larger node at Marsden Park (2 supermarkets and an Aldi), Marsden Park will also trade to the suburbs to the east.

The subject site is expected to largely recapture expenditure from the trade area presently being lost to Browns Plains (an estimate \$31m per year) with Marsden Park continuing to trade close to current levels. This would see minimal impact (5% to 10%) on Marsden Park and it is assessed for this to occur a redevelopment/revamp of this centre would need to take place, otherwise the level of impact will be larger as patrons are attracted to the newer centre on the subject site.

A supermarket anchored shopping centre development on the subject site will benefit the community through a greater level of convenience and an increase in choice, local jobs, competition (resulting in lower prices) and product offer. It is also expected to act as a catalyst for the improvement of Marsden Park Shopping Centre further benefiting the community.

Assumptions

This report has been prepared on the instructions of the stated party and is intended to address the issues as defined in the methodology. The data, analysis and findings contained in this report are, therefore, not appropriate for use in any other circumstance. The report contains a series of projections and forecasts, which have been prepared on the basis of the best available information. Due to the dynamic nature of many of these issues and the number of variables involved, Conics can give no guarantee that these projections and forecasts will be realised.

Documents issued electronically are susceptible to being altered. Therefore, only versions held and issued by Conics can be used as an acceptable reference or source of information.

Appendix A

Demographic Profile	Trade Area		Logan		QLD	
Total Persons	20,962		173,264		3,904,534	
Age						
0 to 4	1,947	9.3%	13,321	7.7%	257,080	6.6%
5 to 14	4,133	19.7%	28,203	16.3%	549,456	14.1%
15 to 19	1,751	8.4%	14,200	8.2%	270,299	6.9%
20 to 24	1,694	8.1%	13,235	7.6%	268,902	6.9%
25 to 34	3,141	15.0%	24,743	14.3%	523,597	13.4%
35 to 44	3,116	14.9%	24,736	14.3%	575,568	14.7%
45 to 54	2,539	12.1%	23,631	13.6%	539,184	13.8%
55 to 64	1,649	7.9%	18,526	10.7%	437,553	11.2%
65 to 74	683	3.3%	7,849	4.5%	259,426	6.6%
75 to 84	250	1.2%	3,687	2.1%	166,809	4.3%
85 years and over	63	0.3%	1,133	0.7%	56,657	1.5%
Marital Status - Persons						
Married	6,646	44.6%	62,291	47.3%	1,519,610	49.1%
Separated	707	4.7%	5,170	3.9%	102,903	3.3%
Divorced	1,420	9.5%	12,741	9.7%	278,849	9.0%
Widowed	439	2.9%	4,984	3.8%	167,311	5.4%
Never Married	5,676	38.1%	46,552	35.3%	1,029,323	33.2%
Total	14,888	100.0%	131,738	100.0%	3,097,996	100.0%
Language Spoken at Home						
English Only	16,981	87.2%	142,229	87.0%	3,371,684	91.8%
Other	2,492	12.8%	21,220	13.0%	303,096	8.2%
Total	19,473	100.0%	163,449	100.0%	3,674,780	100.0%
Relationship in Household						
Husband or wife in registered marriage	6,148	31.5%	57,928	35.5%	1,369,703	38.3%
Partner in de facto marriage	1,717	8.8%	12,854	7.9%	283,558	7.9%
Lone parent	1,304	6.7%	9,740	6.0%	164,219	4.6%
Child under 15	5,574	28.5%	38,625	23.7%	751,084	21.0%
Dependent student (15-24)	821	4.2%	7,938	4.9%	153,842	4.3%
Non-dependent child	1,489	7.6%	12,585	7.7%	202,993	5.7%
Other related individual	592	3.0%	4,096	2.5%	77,267	2.2%
Unrelated individ living in family h/hold	301	1.5%	2,203	1.4%	40,647	1.1%
Group household member	335	1.7%	3,753	2.3%	129,652	3.6%
Lone person	858	4.4%	10,430	6.4%	323,431	9.0%
Visitor (from within Australia)	385	2.0%	2,907	1.8%	81,229	2.3%
Total	19,524	100.0%	163,059	100.0%	3,577,625	100.0%
Household Structure						
Couple with no children	1,364	25.2%	14,301	30.7%	403,854	39.1%
Couple family with children	2,654	49.0%	21,826	46.9%	446,740	43.3%
One parent family	1,310	24.2%	9,740	20.9%	164,219	15.9%
Other family	87	1.6%	688	1.5%	17,221	1.7%
Total	5,415	100.0%	46,555	100.0%	1,032,034	100.0%
Internet Connection						
None	2,167	34.7%	18,914	33.0%	475,307	34.2%
Broadband or Dial up	3,867	61.9%	36,567	63.9%	873,492	62.8%
Not Stated	212	3.4%	1,785	3.1%	42,834	3.1%
Total	6,246	100.0%	57,266	100.0%	1,391,633	100.0%

Demographic Profile	Trade Area		Logan		QLD	
Dwelling Type						
Separate house	6,051	97.0%	49,318	86.1%	1,106,874	79.5%
Semi-detached and townhouse	65	1.0%	5,499	9.6%	105,916	7.6%
Flat, unit, apartment	113	1.8%	2,004	3.5%	156,298	11.2%
Other dwelling	8	0.1%	437	0.8%	21,502	1.5%
Not stated	0	0.0%	7	0.0%	1,042	0.1%
Total	6,237	100.0%	57,265	100.0%	1,391,632	100.0%
Persons per Household						
Separate house	3.18		3.01		2.79	
Semi-detached and townhouse	2.62		2.08		1.99	
Flat, unit, apartment	1.64		1.78		1.71	
Other dwelling: Total	2.50		1.49		1.75	
Not stated	NA		2.14		2.34	
Total	3.14		2.87		2.60	
Dwelling Ownership						
Fully owned	1,020	16.4%	13,561	23.7%	439,677	31.6%
Being purchased directly	2,801	44.9%	23,566	41.2%	470,114	33.8%
Rented	2,245	36.0%	18,478	32.3%	432,296	31.1%
Other Tenure	19	0.3%	258	0.5%	11,723	0.8%
Not Stated	152	2.4%	1,401	2.4%	37,822	2.7%
Total	6,237	100.0%	57,264	100.0%	1,391,632	100.0%
Monthly Housing Loan Repayments						
Average Repayment - Sept 2006 \$	\$1,210		\$1,291		\$1,426	
Average Repayment - Current \$	\$1,338		\$1,427		\$1,576	
Weekly Rent						
Average Rent - Sept 2006 \$	\$208		\$201		\$212	
Average Rent - Current \$	\$230		\$222		\$234	
Employment						
Employed - Full-time	5,790	62.2%	53,610	62.9%	1,180,889	61.6%
Employed - Part-time	2,196	23.6%	21,464	25.2%	530,501	27.7%
Employed - Away From Work	657	7.1%	5,156	6.1%	113,607	5.9%
Employed - Total	8,644	92.8%	80,231	94.2%	1,824,998	95.3%
Unemployed	668	7.2%	4,953	5.8%	90,951	4.7%
Total labour force	9,311	100.0%	85,183	100.0%	1,915,948	100.0%
Not in the labour force	4,388		38,334		971,829	
Occupation						
Upper White	1,098	12.7%	16,188	20.2%	538,560	29.5%
Lower White	2,809	32.5%	28,497	35.5%	624,640	34.2%
Upper Blue	1,505	17.4%	13,989	17.4%	280,343	15.4%
Lower Blue	3,060	35.4%	20,115	25.1%	349,365	19.1%
Other	175	2.0%	1,440	1.8%	32,093	1.8%
Total	8,647	100.0%	80,229	100.0%	1,825,001	100.0%
Average Number of Cars						
	1.79		1.77		1.67	
Household Income						
Average Weekly - Sept 2006 \$	\$1,090		\$1,169		\$1,197	
Average Weekly - Current \$	\$1,205		\$1,292		\$1,323	
Household Income - Sep 2006 \$	\$56,821		\$60,956		\$62,422	
Household Income - Current \$	\$62,810		\$67,380		\$69,001	

Source: ABS, Conics

Current Dollars - September 2009

Appendix B

Consumer Research

Introduction

Enhance Management were commissioned to conduct a telephone survey of 180 people within a designated survey area. The telephone surveys were carried out from the 3rd to the 5th of April 2008.

Respondents were asked questions regarding main store in which they shop, where and what centres they shop in, other centres in which they shop, likelihood of shopping at the subject site, demographic characteristics of the household, where they live, age and employment. The questions asked during the telephone interview are attached in Appendix C.

Methodology

A sample of 180 household shoppers was conducted through a telephone survey from the 3rd to the 5th of April 2008. Prior to the telephone survey four survey areas around the subject site were identified with the telephone survey targeting residents within these areas. These areas can be seen in Appendix D. The aim was to interview 45 people from each survey area.

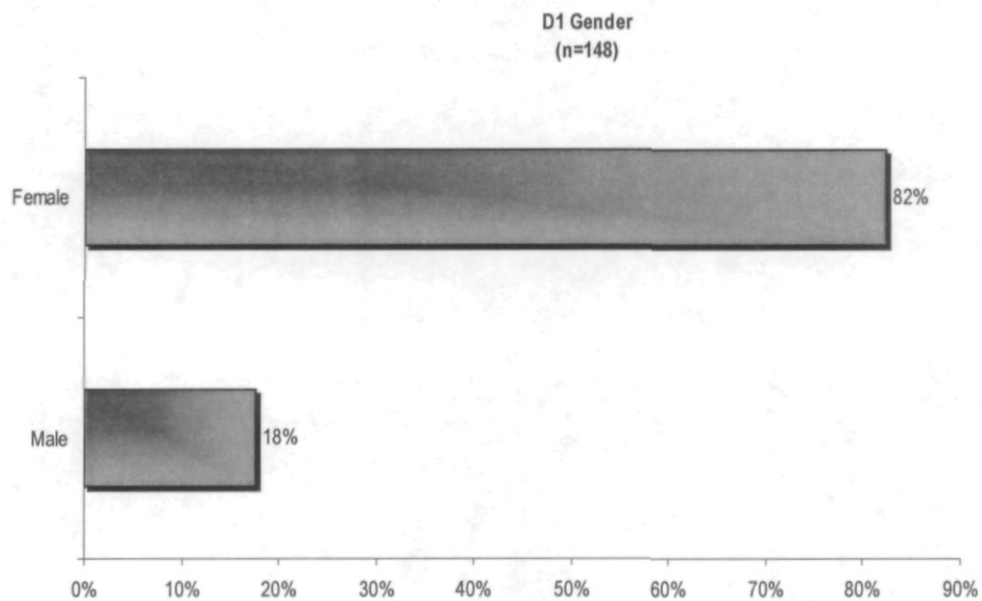
Survey respondents were asked to provide their street and nearest cross street so as their locations could be mapped. Of the 180 respondents 174 were able to be plotted on a map. The discrepancy is due to a number of respondent's streets not being able to be found and respondents refusing to supply their address. Of the 174 responses that could be mapped 148 fell into the survey area. The reason why some responses were outside of the survey areas can be attributed to phone and street directories being out of date and other reasons outside the control of the survey.

Within each of the survey areas there are different population levels. As such respondents from each area carry a different level of weighting so a scale factor has been applied to all results. The following table illustrates the population and relevant scale factor for each survey area.

Scale Factor Table							
	Popn		Number Participants		Scale	Weighted	%
	Number	Popm	Sample	%			
Area 1	7,968	0.24	32	22%	1.10	35	24%
Area 2	11,324	0.34	43	29%	1.16	50	34%
Area 3	4,120	0.12	36	24%	0.50	18	12%
Area 4	10,229	0.30	37	25%	1.22	45	30%
Total	33,641		148			148	

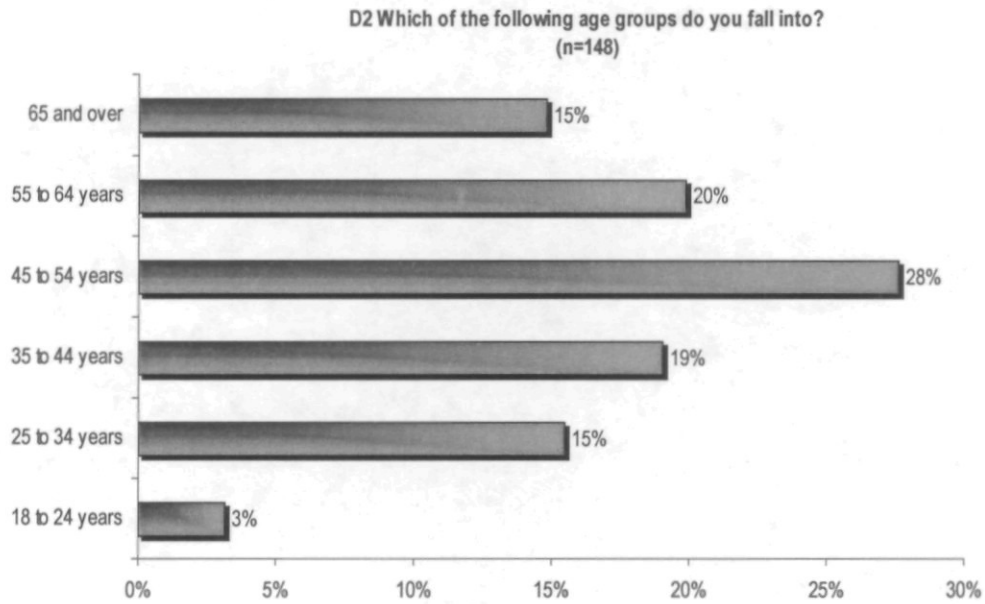
D1 Gender of Respondent

Figure D5 describes the proportion of respondents by gender. The result is as expected, as female members of the household are generally the main shoppers.



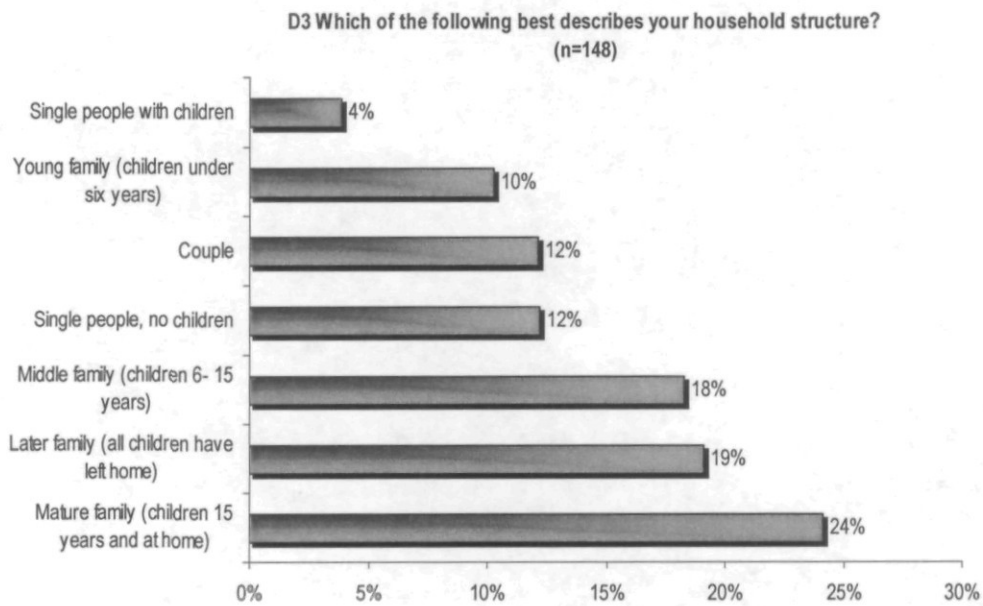
D2 Which of the following age groups do you fall into?

Figure D2 represents the age category of respondents. The age of respondents is a good cross representation of the different shopping behaviours of residents.



D3 Which of the following best describes your household structure?

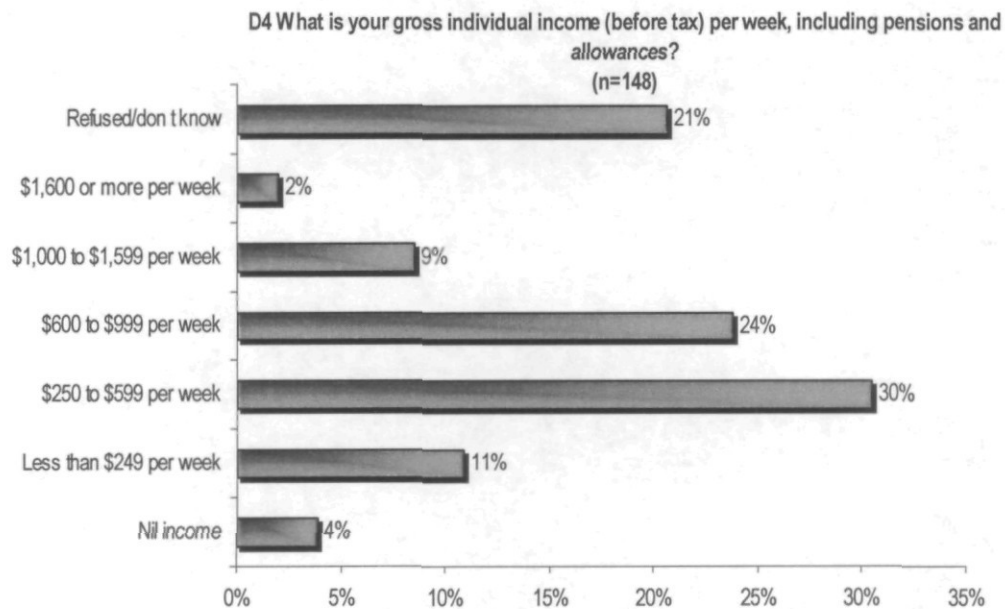
Figure D3 represents the respondent's household structure.



These results indicate that the area is predominately (52%) made up of families with children.

D4 What is your gross individual income (before tax) per week including pensions and allowances?

Figures D4 represents respondents' individual income.



The results indicate that the majority of respondents (54%) have a gross individual income (before tax) per week of between \$250 and \$999.

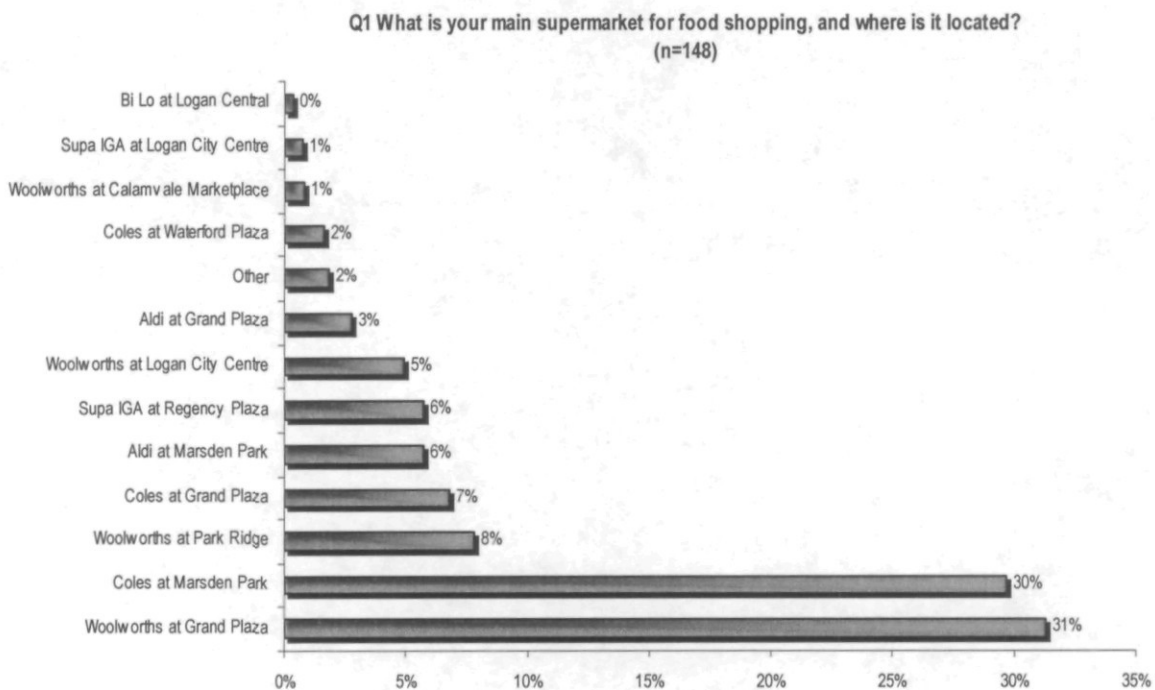
Summary Respondent Characteristics

The telephone surveys indicate that residents surrounding the subject site have the following characteristics:

- The majority of respondents (82%) were females compared to 18% males. This result is reflective of female members generally being the main household shoppers.
- The majority of respondents (52%) also indicated that they were families with children households. This indicates that the majority of households have at least two or more people. Larger households usually result in larger shopping trips than smaller households as they are often constrained by time.

Q1 What is your main supermarket for food shopping, and where is it located?

Figure Q1 represents the respondent's main supermarket shop.

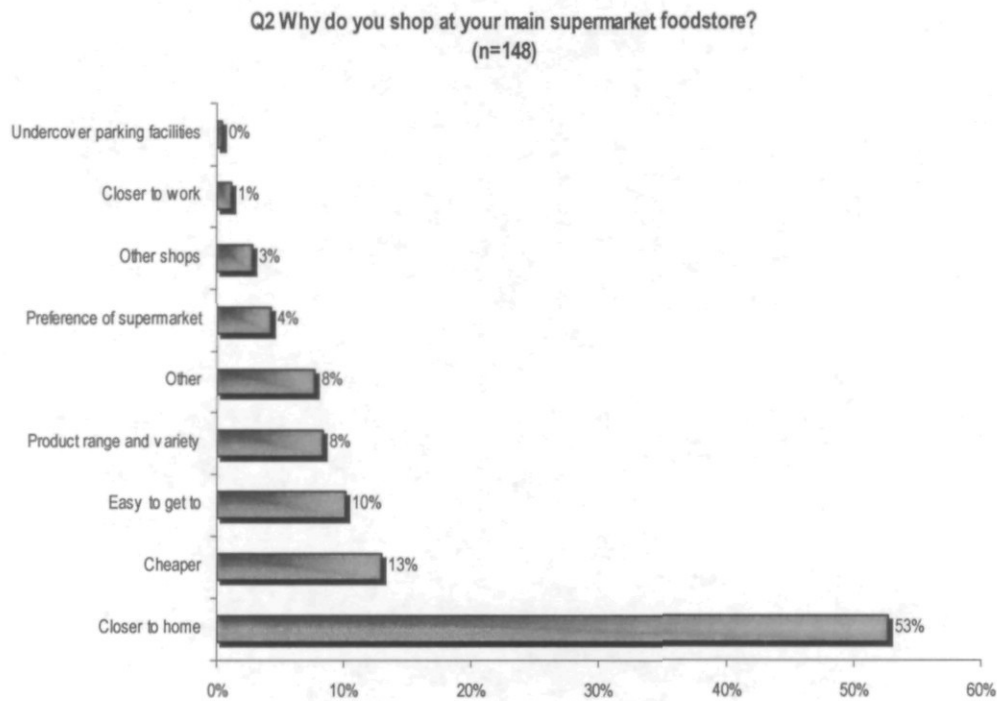


The results in figure Q1 are as follows:

- The majority of respondents (61%) conduct their main supermarket shopping at either Woolworths at Grand Plaza (31%) or at Coles at Marsden Park (30%)
- At least 13 different supermarkets are currently being used by respondents

Q2 Why do you shop at your main supermarket foodstore?

Figure Q2 represents the respondent's reason for shopping at their main supermarket.



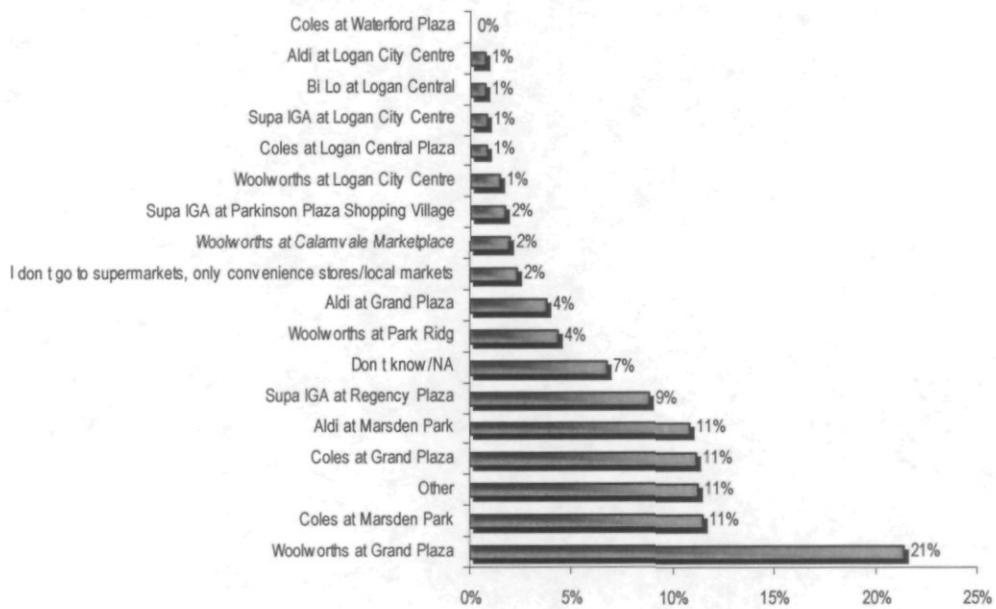
The results in figure Q2 are as follows:

- The majority of respondents (53%) cited that their reason for conducting their supermarket shopping at their main supermarket was because it was closer to home
- 13% of respondents listed that they shopped at their main supermarket because it was cheaper

Q3 What other supermarket or food stores do you shop at?

Figure Q3 represents the other supermarkets respondent's shop at.

Q3 What other supermarkets or food stores do you shop at?
(n=148)

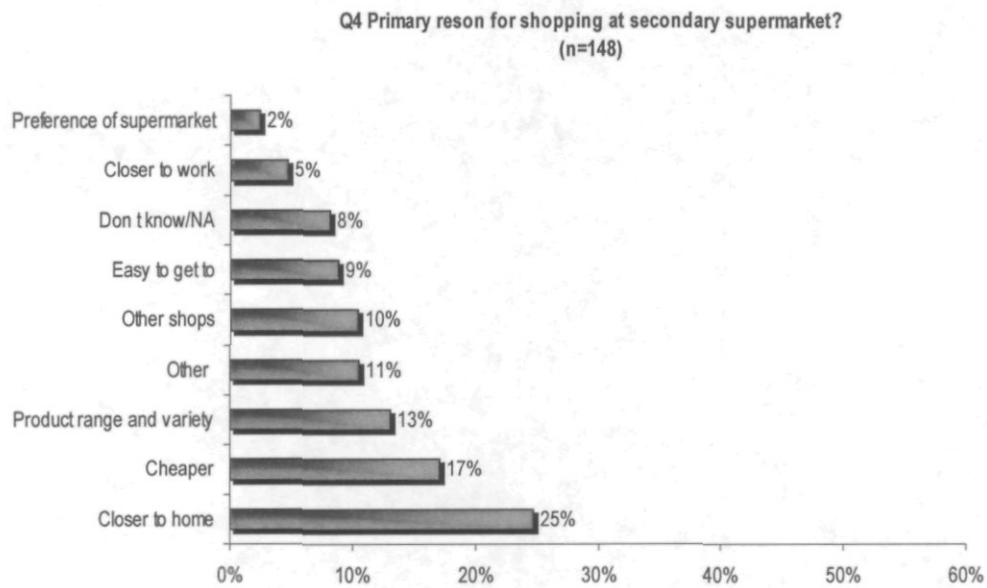


The results in figure Q3 indicate:

- Woolworths at Grand Plaza was the location of the highest numbers of respondents other supermarket shop.

Q4 Why do you shop at these stores?

Figure Q4 represents the respondent's reasons for shopping at other supermarkets or food stores.

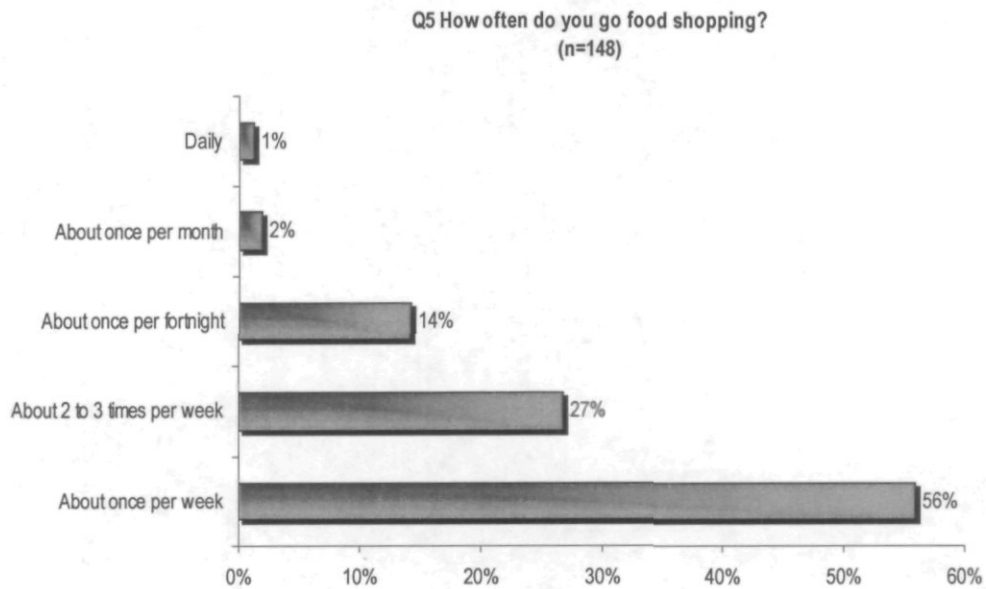


The results in figure Q4 indicate:

- 25% of respondents listed that they shopped at their secondary supermarket because it was 'closer to home'
- 17% of respondents listed that they shopped at their secondary supermarket because it was 'cheaper'

Q5 How often do you usually shop at a supermarket?

Figure Q5 represents how often the respondent's shop at a supermarket.

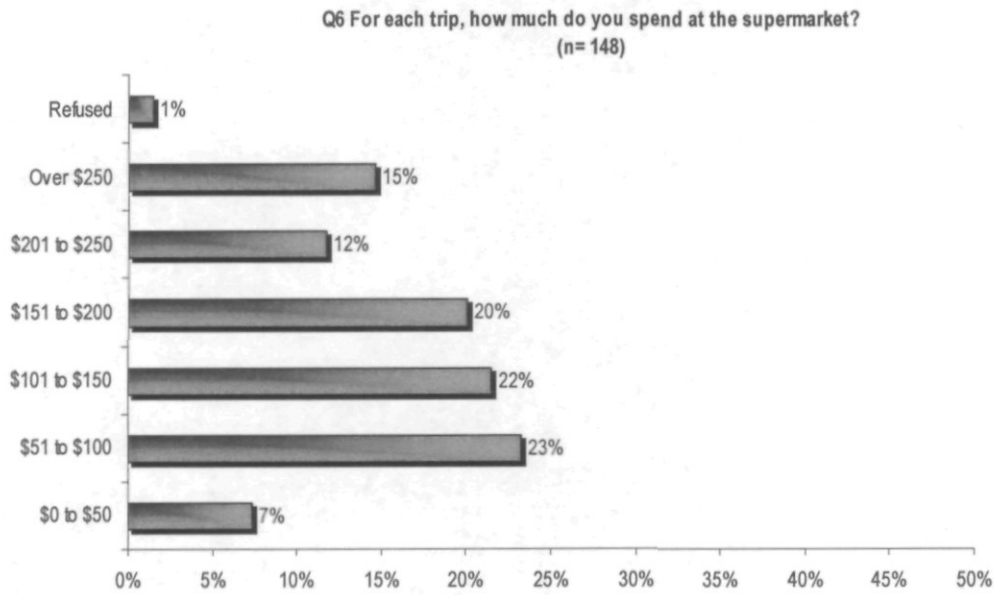


The results in figure Q5 indicate:

- The majority (84%) respondents conduct their supermarket shop at least once per week.
- Of those surveyed 56% indicated that they do supermarket shopping '*about once per week*'.

Q6 For each of these trips, approximately how much would you spend at the supermarket?

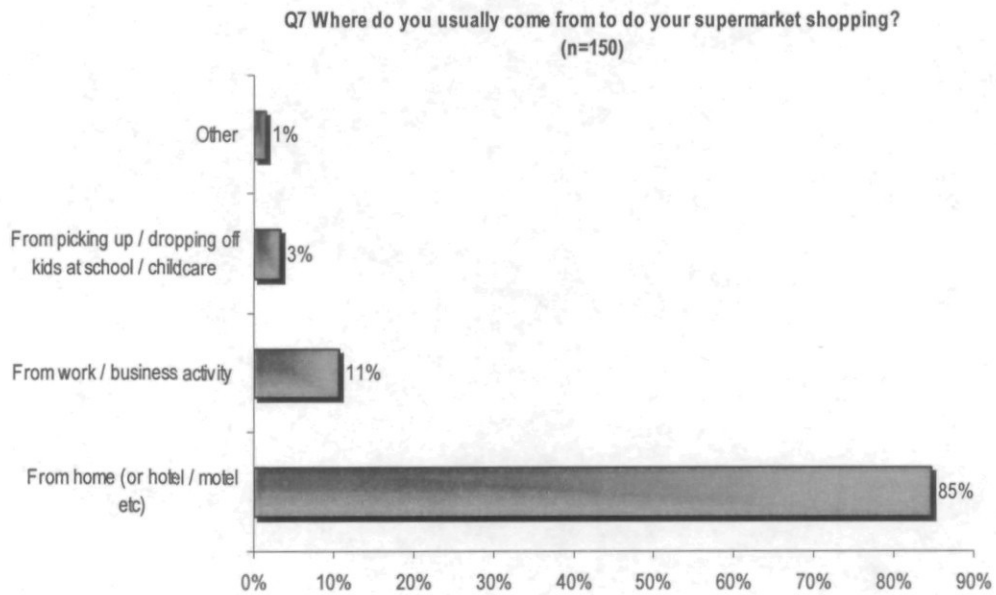
Figure Q6 represents how much the respondents spend on each supermarket trip.



The results from figure Q6 indicate that the majority of respondents (69%) spend over \$100 per supermarket shop.

Q7 Where do you usually come from to do your supermarket shopping?

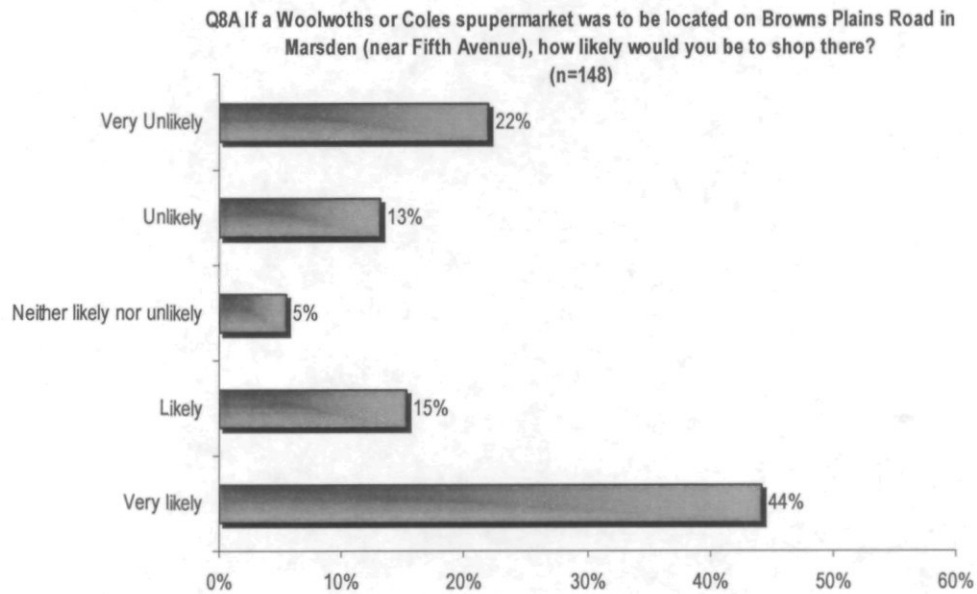
Figure Q7 represents the location respondents usually come from when conducting their supermarket shop.



Results from figure Q7 indicate that the majority (82%) of respondents travel from home to conduct their supermarket shopping with the next highest percentage (16%) coming from work/business activity.

Q8a If a Woolworths or Coles supermarket was to be located on Browns Plains Road in Marsden (near Fifth Avenue), how likely would you be to shop there?

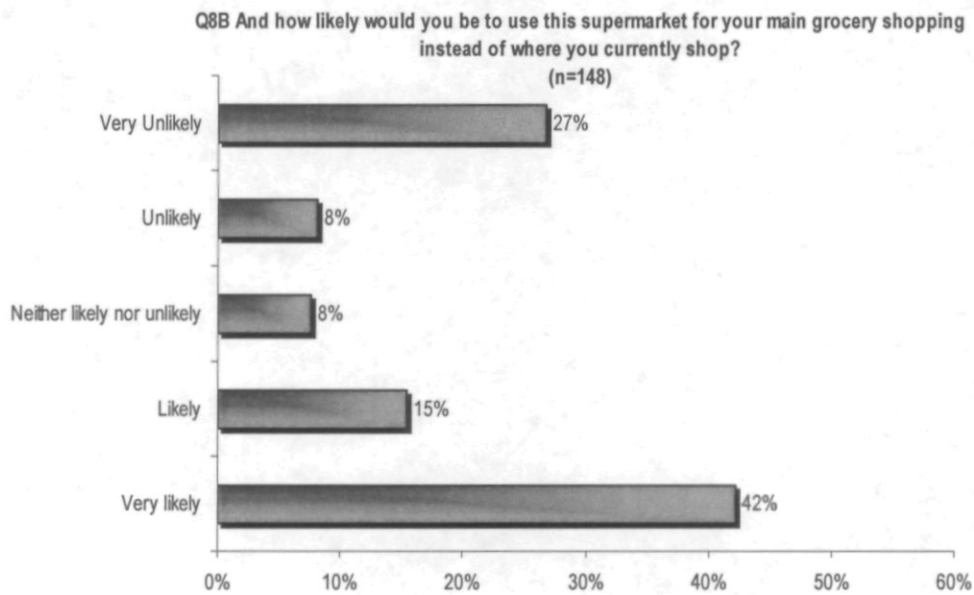
Figure Q8a represents the likelihood of respondent's shopping at the subject site.



Results from figure Q8a indicate that the majority (59%) of respondents were 'likely' to shop at the subject site.

Q8b And how likely would you be to use this supermarket for your main grocery shopping instead of where you currently shop?

Figure Q8b represents the likelihood of respondents conducting their main supermarket shop at the subject site.



Results from figure Q8b indicate that the majority (57%) of respondents were 'likely' to conduct their main supermarket shop at the subject site.

Appendix C

CONSUMER ANALYSIS – TELEPHONE SURVEY							
<p>Good morning / afternoon / evening, my name is _____ from _____. Can I speak with the main supermarket shopper over 18 of the household? We are conducting a survey of supermarket shoppers in the local area, and would like to include your opinions.</p> <p>If you choose to participate the information and opinions you provide will be used only for research purposes. The survey will take around 5 minutes of your time.</p>							
S1	<p>Do you or anyone in your immediate family work in the following fields: advertising, marketing, market research, or in the retail industry? IF YES, THANK AND DISCONTINUE</p> <table style="width: 100%; border: none;"> <tr> <td style="text-align: right;">Yes</td> <td style="text-align: right;">1</td> </tr> <tr> <td style="text-align: right;">No</td> <td style="text-align: right;">2</td> </tr> <tr> <td style="text-align: right;">Don't Know/NA</td> <td style="text-align: right;">99</td> </tr> </table>	Yes	1	No	2	Don't Know/NA	99
Yes	1						
No	2						
Don't Know/NA	99						

SUPERMARKETS																																					
Q1	<p>What is your main supermarket for food shopping, and where is it located? PROMPT FOR LOCATION BASED ON SUBURB. SINGLE RESPONSE</p> <table style="width: 100%; border: none;"> <tr><td style="text-align: right;">Coles at Logan Central Plaza (Wembley Road)</td><td style="text-align: right;">1</td></tr> <tr><td style="text-align: right;">Bi Lo at Logan Central (Wembley Road)</td><td style="text-align: right;">2</td></tr> <tr><td style="text-align: right;">Woolworths at Logan City Centre (Kingston Road)</td><td style="text-align: right;">3</td></tr> <tr><td style="text-align: right;">Supa IGA at Logan City Centre (Kingston Road)</td><td style="text-align: right;">4</td></tr> <tr><td style="text-align: right;">Aldi at Logan City Centre (Kingston Road)</td><td style="text-align: right;">5</td></tr> <tr><td style="text-align: right;">Woolworths at Calamvale Marketplace (Beaudesert Road, Calamvale)</td><td style="text-align: right;">6</td></tr> <tr><td style="text-align: right;">Supa IGA at Parkinson Plaza Shopping Village (Algester Road, Parkinson)</td><td style="text-align: right;">7</td></tr> <tr><td style="text-align: right;">Coles at Marsden Park (Chambers Flat Road)</td><td style="text-align: right;">8</td></tr> <tr><td style="text-align: right;">Aldi at Marsden Park (Chambers Flat Road)</td><td style="text-align: right;">9</td></tr> <tr><td style="text-align: right;">Woolworths at Park Ridge (Park Ridge Road)</td><td style="text-align: right;">10</td></tr> <tr><td style="text-align: right;">Coles at Waterford Plaza (Kingston Road, Waterford West)</td><td style="text-align: right;">11</td></tr> <tr><td style="text-align: right;">Supa IGA at Regency Plaza (Vansittart Road, Regents Park)</td><td style="text-align: right;">12</td></tr> <tr><td style="text-align: right;">Woolworths at Grand Plaza (Browns Plains)</td><td style="text-align: right;">13</td></tr> <tr><td style="text-align: right;">Coles at Grand Plaza (Browns Plains)</td><td style="text-align: right;">14</td></tr> <tr><td style="text-align: right;">Aldi at Grand Plaza (Browns Plains)</td><td style="text-align: right;">15</td></tr> <tr><td style="text-align: right;">I don't go to supermarkets, only convenience stores / local markets</td><td style="text-align: right;">77</td></tr> <tr><td style="text-align: right;">Other (specify) _____</td><td style="text-align: right;">88</td></tr> <tr><td style="text-align: right;">Don't know/NA</td><td style="text-align: right;">99</td></tr> </table>	Coles at Logan Central Plaza (Wembley Road)	1	Bi Lo at Logan Central (Wembley Road)	2	Woolworths at Logan City Centre (Kingston Road)	3	Supa IGA at Logan City Centre (Kingston Road)	4	Aldi at Logan City Centre (Kingston Road)	5	Woolworths at Calamvale Marketplace (Beaudesert Road, Calamvale)	6	Supa IGA at Parkinson Plaza Shopping Village (Algester Road, Parkinson)	7	Coles at Marsden Park (Chambers Flat Road)	8	Aldi at Marsden Park (Chambers Flat Road)	9	Woolworths at Park Ridge (Park Ridge Road)	10	Coles at Waterford Plaza (Kingston Road, Waterford West)	11	Supa IGA at Regency Plaza (Vansittart Road, Regents Park)	12	Woolworths at Grand Plaza (Browns Plains)	13	Coles at Grand Plaza (Browns Plains)	14	Aldi at Grand Plaza (Browns Plains)	15	I don't go to supermarkets, only convenience stores / local markets	77	Other (specify) _____	88	Don't know/NA	99
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Q2	<p>Why do you shop at your main supermarket or food store? PROMPT Any other reasons? MORE THAN ONE RESPONSE IS OK. CIRCLE FIRST RESPONSE IN LEFT COLUMN. CIRCLE ADDITIONAL RESPONSES IN RIGHT COLUMN.</p>		
		1 ST RESPONSE	OTHER RESPONSES
	Closer to home	1	1
	Closer to work	2	2
	Easy to get to	3	3
	Preference of supermarket	4	4
	Undercover parking facilities	5	5
	Cheaper	6	6
	Product range and variety	7	7
	Other shops	8	8
	Air conditioned	8	8
	Other (specify)	88	88
	Don't know/NA	99	99

Q3	<p>What other supermarkets or food stores do you shop at? MORE THAN ONE RESPONSE IS OK. CIRCLE FIRST RESPONSE IN LEFT COLUMN. CIRCLE ADDITIONAL RESPONSES IN RIGHT COLUMN.</p>				
				1 ST RESPONSE	OTHER RESPONSES
			Coles at Logan Central Plaza (Wembley Road)	1	1
	Bi Lo at Logan Central (Wembley Road)	2	2		
	Woolworths at Logan City Centre (Kingston Road)	3	3		
	Supa IGA at Logan City Centre (Kingston Road)	4	4		
	Aldi at Logan City Centre (Kingston Road)	5	5		
	Woolworths at Calamvale Marketplace (Beaudesert Road, Calamvale)	6	6		
	Supa IGA at Parkinson Plaza Shopping Village (Algester Road, Parkinson)	7	7		
	Coles at Marsden Park (Chambers Flat Road)	8	8		
	Aldi at Marsden Park (Chambers Flat Road)	9	9		
	Woolworths at Park Ridge (Park Ridge Road)	10	10		
	Coles at Waterford Plaza (Kingston Road, Waterford West)	11	11		
	Supa IGA at Regency Plaza (Vansittart Road, Regents Park)	12	12		
	Woolworths at Grand Plaza (Browns Plains)	13	13		
	Coles at Grand Plaza (Browns Plains)	14	14		
	Aldi at Grand Plaza (Browns Plains)	15	15		
	I don't shop at any additional supermarkets or food stores				
	GO TO Q5	77	77		
	Other (specify) _____	88	88		
	Don't know/NA	99	99		

Q4	Why do you shop at these stores? PROMPT Any other reasons? MORE THAN ONE RESPONSE IS OK. CIRCLE FIRST RESPONSE IN LEFT COLUMN. CIRCLE ADDITIONAL RESPONSES IN RIGHT COLUMN.		1 ST RESPONSE	OTHER RESPONSES
		Closer to home	1	1
		Closer to work	2	2
		Easy to get to	3	3
		Preference of supermarket	4	4
		Undercover parking facilities	5	5
		Cheaper	6	6
		Product range and variety	7	7
		Other shops	8	8
		Air conditioned	9	9
		Other	88	88
Don't know/NA	99	99		

Q5	How often do you go supermarket shopping? SINGLE RESPONSE	Almost everyday	1
		About 2 to 3 times per week	2
		About once per week	3
		About once per fortnight	4
		About once per month	5
		Less frequently	6
		Never	7

Q6	For each of these trips, approximately how much would you spend at the supermarket? SINGLE RESPONSE	\$0 to \$50	1
		\$51 to \$100	2
		\$101 to \$150	3
		\$151 to \$200	4
		\$201 to \$250	5
		Over \$250	6

Q7	Where do you usually come from to do your supermarket shopping? READ OUT. SINGLE RESPONSE	From home (or hotel / motel etc)	1
		From work / business activity (specify suburb)	2
		From picking up / dropping off kids at school / childcare	3
		From other shopping centre (specify)	4
		Other(specify)	88

Q8	A. If a Woolworths or Coles supermarket was to be located on Browns Plains Road in Marsden (near Fifth Avenue), what is the likelihood that you would shop here? READ OUT. SINGLE RESPONSE									
	B. And how likely would you be to use this supermarket for your main grocery shop instead of where you currently go to at (INSERT ANSWER FROM Q1) <table style="float: right; margin-top: 10px;"> <tr><td>Very likely</td><td>1</td></tr> <tr><td>Likely</td><td>2</td></tr> <tr><td>Neutral</td><td>3</td></tr> <tr><td>Unlikely</td><td>4</td></tr> <tr><td>Very Unlikely</td><td>5</td></tr> </table>	Very likely	1	Likely	2	Neutral	3	Unlikely	4	Very Unlikely
Very likely	1									
Likely	2									
Neutral	3									
Unlikely	4									
Very Unlikely	5									

Q9	We would also like to plot on a map approximately where you live. Can you give the following details?
	Street:
	Nearest cross street that connects with or crosses that street:
	Suburb / locality:
	Postcode <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

To make sure we have been talking to a good cross section of the population, I'd like to ask you some questions about yourself.																									
D1	Gender. INTERVIEWER TO COMPLETE <table style="width: 100%; border: none;"> <tr> <td style="width: 80%;"></td> <td style="text-align: right;">Male</td> <td style="text-align: right;">1</td> </tr> <tr> <td></td> <td style="text-align: right;">Female</td> <td style="text-align: right;">2</td> </tr> </table>		Male	1		Female	2																		
	Male	1																							
	Female	2																							
D2	Which of the following age groups do you fall into? <table style="width: 100%; border: none;"> <tr> <td style="width: 80%;"></td> <td style="text-align: right;">18 to 24 years</td> <td style="text-align: right;">1</td> </tr> <tr> <td></td> <td style="text-align: right;">25 to 34 years</td> <td style="text-align: right;">2</td> </tr> <tr> <td></td> <td style="text-align: right;">35 to 44 years</td> <td style="text-align: right;">3</td> </tr> <tr> <td></td> <td style="text-align: right;">45 to 54 years</td> <td style="text-align: right;">4</td> </tr> <tr> <td></td> <td style="text-align: right;">55 to 64 years</td> <td style="text-align: right;">5</td> </tr> <tr> <td></td> <td style="text-align: right;">65 and over</td> <td style="text-align: right;">6</td> </tr> <tr> <td></td> <td style="text-align: right;">Refused</td> <td style="text-align: right;">99</td> </tr> </table>		18 to 24 years	1		25 to 34 years	2		35 to 44 years	3		45 to 54 years	4		55 to 64 years	5		65 and over	6		Refused	99			
	18 to 24 years	1																							
	25 to 34 years	2																							
	35 to 44 years	3																							
	45 to 54 years	4																							
	55 to 64 years	5																							
	65 and over	6																							
	Refused	99																							
D3	Which of the following best describes your household structure? <table style="width: 100%; border: none;"> <tr> <td style="width: 80%;"></td> <td style="text-align: right;">Single person, no children</td> <td style="text-align: right;">1</td> </tr> <tr> <td></td> <td style="text-align: right;">Single person with children</td> <td style="text-align: right;">2</td> </tr> <tr> <td></td> <td style="text-align: right;">Couple family, no children</td> <td style="text-align: right;">3</td> </tr> <tr> <td></td> <td style="text-align: right;">Young family (children under five years)</td> <td style="text-align: right;">4</td> </tr> <tr> <td></td> <td style="text-align: right;">Middle family (children 5 - 15 years)</td> <td style="text-align: right;">5</td> </tr> <tr> <td></td> <td style="text-align: right;">Mature family (children 15 years and at home)</td> <td style="text-align: right;">6</td> </tr> <tr> <td></td> <td style="text-align: right;">Later family (all children have left home)</td> <td style="text-align: right;">7</td> </tr> <tr> <td></td> <td style="text-align: right;">Refused</td> <td style="text-align: right;">99</td> </tr> </table>		Single person, no children	1		Single person with children	2		Couple family, no children	3		Young family (children under five years)	4		Middle family (children 5 - 15 years)	5		Mature family (children 15 years and at home)	6		Later family (all children have left home)	7		Refused	99
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D4	What is your gross individual income (before tax) per week, including pensions and allowances? <table style="width: 100%; border: none;"> <tr> <td style="width: 80%;"></td> <td style="text-align: right;">Nil income</td> <td style="text-align: right;">1</td> </tr> <tr> <td></td> <td style="text-align: right;">less than \$249 per week</td> <td style="text-align: right;">2</td> </tr> <tr> <td></td> <td style="text-align: right;">\$250 to \$599 per week</td> <td style="text-align: right;">3</td> </tr> <tr> <td></td> <td style="text-align: right;">\$600 to \$999 per week</td> <td style="text-align: right;">4</td> </tr> <tr> <td></td> <td style="text-align: right;">\$1,000 to \$1,599 per week</td> <td style="text-align: right;">5</td> </tr> <tr> <td></td> <td style="text-align: right;">\$1,600 or more per week</td> <td style="text-align: right;">6</td> </tr> <tr> <td></td> <td style="text-align: right;">Refused/don't know</td> <td style="text-align: right;">99</td> </tr> </table>		Nil income	1		less than \$249 per week	2		\$250 to \$599 per week	3		\$600 to \$999 per week	4		\$1,000 to \$1,599 per week	5		\$1,600 or more per week	6		Refused/don't know	99			
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D5	Day of interview? INTERVIEWER TO COMPLETE <table style="width: 100%; border: none;"> <tr> <td style="width: 80%;"></td> <td style="text-align: right;">Monday</td> <td style="text-align: right;">1</td> </tr> <tr> <td></td> <td style="text-align: right;">Tuesday</td> <td style="text-align: right;">2</td> </tr> <tr> <td></td> <td style="text-align: right;">Wednesday</td> <td style="text-align: right;">3</td> </tr> <tr> <td></td> <td style="text-align: right;">Thursday</td> <td style="text-align: right;">4</td> </tr> <tr> <td></td> <td style="text-align: right;">Friday</td> <td style="text-align: right;">5</td> </tr> <tr> <td></td> <td style="text-align: right;">Saturday</td> <td style="text-align: right;">6</td> </tr> <tr> <td></td> <td style="text-align: right;">Sunday</td> <td style="text-align: right;">7</td> </tr> </table>		Monday	1		Tuesday	2		Wednesday	3		Thursday	4		Friday	5		Saturday	6		Sunday	7			
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That's all the questions I have for you today. Thank you for your time and assistance with the survey.

Appendix D

Appendix D Survey Areas

