Sunshine Coast Council

Additional Information

Ordinary Meeting

Thursday, 12 November 2020

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ITEM	SUBJECT	PAGE NO

Related Report / Additional Information Request

Meeting:	**Ordinary Meeting**	**Date:**	**12 November 2020**
Requesting Councillor:	**Mayor**		
Item:	**Item 8.2 Quarterly Report**		
Confidential	***Nil***		
Circulation	***9 November 2020***		
Officer (title):		**Approving GE (title):**	Group Executive, Economic and Community Development

In response to a question raised by Councillors, please note the following additional information for your consideration.

Question:

What were the holiday parks revenue compared to last year?

Response:

The Holiday Parks revenue for Financial Years 2018/19 and 2019/20:

FY 2018/19 $16,679,000

FY 2019/20 $14,556,000

The Holiday Parks revenue for quarter 1 in 2019 and Quarter 1 in 2020:

Q1 2019 $5,081,000

Q1 2020 $4,562,000

Question:

Provide more details on the success of the Vitamin C Campaign.

Response:

The campaign was launched on Facebook on 4 September 2020. Due to reporting timelines, it is only possible to report on the period 4-14 of September. The next report is due in November 2020.

For the 10 days that is currently reportable in the September period:

- 28,000 impressions – that is how many adverts have appeared on the target market’s feed over this period.
- Viewer locations: 65% Brisbane, 22% Sydney, 12% Melbourne, 1% Other (1 in 3 are interstate)
- Video views on the campaign advertisement – 14,435

- 15 downloads of the e-book
- 32 leads were registered to be followed by the team

In addition to the Facebook advertising, a supporting advertorial in CIO Magazine was published: https://www.cio.com/article/3573778/re-shoring-up-technology-and-talent.html

The local business community that have seen the creative are very supportive, and companies with land and building developments within Sunshine Coast region are keen to leverage the creative for their individual developments.

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Related Report / Additional Information Request

Meeting:	**Ordinary Meeting**	**Date:**	**12 November 2020**
Requesting Councillor:	**Various**		
Item:	**Item 8.3 DA Forest Glen**		
Confidential	**No**		
Circulation	**10 November 2020**		
Officer (title):	**Senior Development Planner**	**Approving GE (title):**	**Acting Group Executive Customer Engagement and Planning Services**

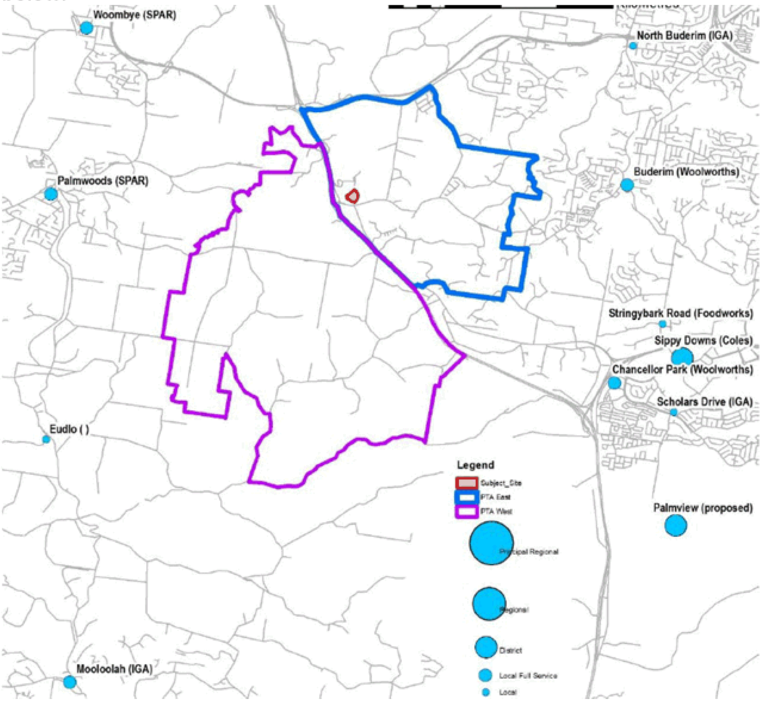
In response to a question raised by Councillors, please note the following additional information for your consideration.

Question:

What is the number of residential properties in the area?

Response:

The primary trade area identified in the Applicant's economic assessment is shown in the blue and purple outline below:



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The Trade Area identifies a total of 4,424 people, which Council's independent economic peer reviewer has agreed with.

In the immediate vicinity of the subject site, the following three residential developments are located:

- 16 Grammar School Way, to the east, which is under construction for a retirement facility with 177 dwellings.
- 5 Owen Creek Road, to the south, which is under construction for 90 small lots houses and approximately 35 units.
- 71 Owen Creek Road, further to the south, which is developed for Natures Edge relocatable home development with approximately 300 dwellings.

Question:

Can the economic reports and peer review be made available?

Response:

Copies of the below economic reports and peer reviews are attached to this request:

- Applicant's original Economic Impact Assessment prepared by RPS Group dated 14 June 2019.
- Applicant's Economic Response to Council's Information Request prepared by RPS Group dated 19 December 2019.
- Council's external independent Economic Peer Review prepared by Norling Consulting dated 10 February 2020.

Question:

Is there any more that can be done to provide pedestrian footpath links to existing stages? It appears there are no provisions to walk between precincts and connecting to sites and bus stops external to the subject site.

Response:

The below plan identifies the applicant's traffic master plan. The purple dotted lines represent pedestrian paths / access. The blue arrows identify additional pedestrian connections that have been conditioned as part of the staff recommendation for approval.

There are two bus stops within proximity of the subject site (Yellow stars on the plan below). One is located on the site's frontage to Mons Road at the location of the local shops and is easily accessible from the site by pedestrians. There is another located on the opposite side of Mons Road directly opposite Kunara Market Place. There are existing footpaths along the site's frontage to Mons Road and along Grammar School Way connecting to the Bus Stops. There is a crossing and pedestrian refuge on the western side of the Mons Rd / Grammar School Rd roundabout to allow pedestrians to cross Mons Rd and reach the bus stop on the southern side. The walking distance from Kunara Market Place to the main pedestrian spine into the subject site (represented by the blue stars on the plan below) is approximately 160 metres entirely along paved footpaths.

The existing on site vegetation to the rear of the Kunara Market Place is character vegetation identified for protection under the *Sunshine Coast Planning Scheme 2014*. The area adjoining this vegetation is also a drainage channel to be transferred to Council ownership, with design levels likely to be 3m below the level of the shopping centre carpark and footpaths. It is considered unnecessary and undesirable to require a footpath connection directly to the back of Kunara Market Place through a drainage channel and character vegetation.

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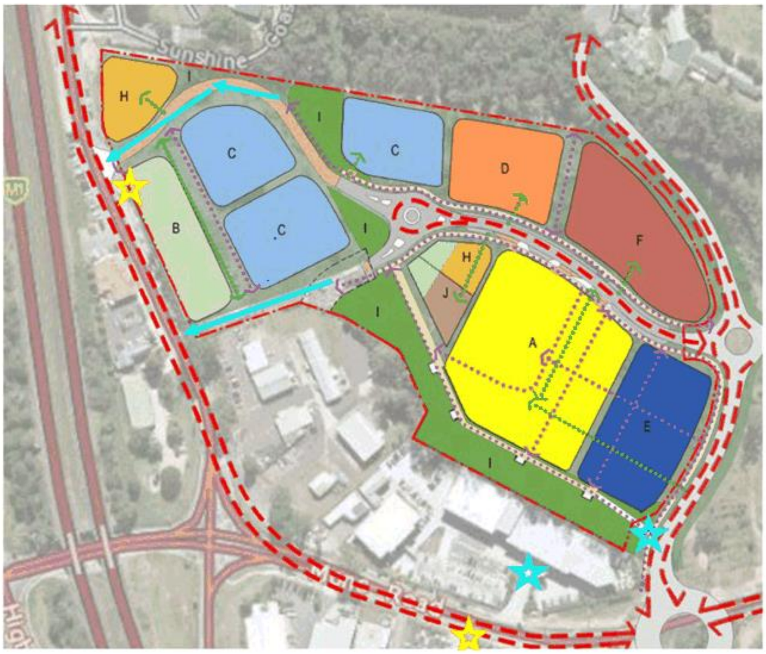

Sunshine Coast Council : Effective 12 October 2020 : Version 1 Form 5

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Question:

Provide map correction – spelling of “Grammar School Way”.

Response:

The Plan that includes the incorrect spelling of Grammar School Way was prepared and submitted by the applicant. Council is unable to amend the wording on the plan. However, should the application be approved, officers can request the applicant to correct the spelling as part of the required plan amendment process.

Question:

Does the proposed variation request which varies the effect of the *Sunshine Coast Planning Scheme 2014* override how the planning scheme applies to other parts of the local plan area?

Response:

No it does not. This approval would apply to the three lots associated with this application only. The application, if approved would only vary the effect of the Planning Scheme as it applies to the three lots that form this site and would have no effect to other land. This is also specified in Introduction of the Plan of Development document.

MONS ROAD, FOREST GLEN

Economic Impact Assessment

PR137863
Mons Road, Forest Glen
V1.1
14 June 2019

rpsgroup.com

REPORT

Document status

Version	Purpose of document	Authored by	Reviewed by	Approved by	Review date
V1.0	Submission	WO	WO	WO	5 June 2019
V1.1	Revised Plans	WO	WO	WO	14 June 2019

Approval for issue

William Owen		14 June 2019

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1 SUMMARY

The purpose of this report is to determine the economic impacts of the proposed medical centre and shopping centre located at Mons Road, Forest Glen. The proposed uses from part of a higher-level application which includes Lot 7 SP246654, Lot 8 RP810748 & Lot 14 SP295875. The masterplan development of these site will be delivered over three stages and this economic report considers the proposed Stage 1 uses.

- Building 1: Shopping Centre, including a convenience supermarket and ancillary retail tenancies
  - Supermarket – 1,500m^2
  - Shop 1 – 120m^2
  - Shop 2 – 278m^2
- Building 2: Medical Retail Building – 600m^2
- Building 3: Medical centre – 2,341m^2

1.1 Forest Glen

The Forest Glen precinct has a retail GFA of approximately 6,500 Sq M. The retail uses in the centre serve two distinct functions:

- Uses typically found in a local centre. This includes the service station and the retail fronting Mons Road. The GFA of the 'local' shops is 1,000 Sq M. These uses are considered to be convenience retail. The precinct does not include a convenience supermarket.
- Specialised retail and uses that that service a broader area and passing traffic. This includes; Chemist Warehouse, brewery and the organic/health uses located at 330 Mons Road. The GFA of these non-typical uses is 5,500 Sq M. A total of 4,500 Sq M is considered to be destination or large format retail with 1,000 Sq M occupied by other services (including medical).

1.2 Retail Infrastructure

The Forest Glen catchment is defined by the presence of the local (full service) and higher order centres at Sippy Downs, Chancellor Park, Buderim, North Buderim, Woombye and Palmwoods. When compared to these centres, Forest Glen has several distinctive attributes:

- The centre has a well-defined local residential catchment and primarily serves the traffic that uses Mons Road and the Bruce Highway interchanges.
- The precinct hosts a range of retail and services that are not typically found in a local (not full service) centre. These include Brewery, Chemist Warehouse and organic/health services.
- The non-typical retail, in conjunction with the Grammar School, industrial land and the traffic that uses Mons Road, establishes Forest Glen as an activity centre with extensive inflow patronage. The inflow patronage is generated from a broad area and is not considered to be a traditional catchment.

1.3 Planning

The planning for Forest Glen intends that this area of the Sunshine Coast be serviced by a local (not full service) centre and the district centre at Buderim.

The development of the Kunara Organic Marketplace site (in concert with other destination retail and related uses) means that the majority of retail and services at Forest Glen are destination retail and the precinct no longer has a dominant main street configuration.

The local plan code accommodates that the centre will cater to the needs of visitors that are passing through the area. Given the scale of the industrial area, the proximity of a major school, and the level of traffic using Mons Road; the term 'visitors' in the context of Forest Glen is assessed as including these groups. Consequently, the centre should be scaled to meet the needs of these patrons.

1.4 Trade Area Delineation

The Primary Trade Area (PTA) is defined as the natural catchment for Forest Glen as a local centre serving the needs of local residents. Refer to Figure 6 on page 18. At capacity, the PTA is projected to have 1,577 dwellings that will house 4,424 people.

The balance of the patronage is assessed to be inflow expenditure, with the retail and services expenditure generated by residents from a large portion of the Sunshine Coast (including local workers, school-based traffic and traffic using Mons Road). In this context, a large part of the Forest Glen centre acts more as a highway service centre that caters to traffic generated by the Sunshine Coast Grammar School, the Bruce Highway entrances/exits, the industrial area and residents of Buderim using Mons Road.

A Sub-Regional catchment (consisting of six Statistical Area 2 – that generally extend 6Km to 8Km from Forest Glen) has also been defined to represent the regional traffic that patronises businesses at Forest Glen. The population of the Sub Regional catchment is projected to increase from 79,552 in 2016 to 115,668 in 2031. This is a total increase of 36,116 people or 2,408 per annum.

1.5 Needs Assessment

1.5.1 Community Need

At capacity, the PTA will have a population of over 4,400 people with much of the population growth occurring near the Forest Glen centre. As intended by the planning scheme, this population should be serviced by a local centre.

At a local level, the PTA is an above average income community with a concentration of owner-occupiers and a distribution of age and household groups that is younger than the Sunshine Coast average. These features indicate the local residents are:

- Time poor – patronising convenience retail and takeaway food.
- Users of childcare facilities at above average rates.
- Loyal patrons of suitable local facilities.

The inclusion of a convenience supermarket and related retail in the centre is entirely consistent with the needs of the community and the objectives of the planning scheme. The proposed 1,500 Sq M supermarket is smaller than a full line supermarket and is a good fit for a local 'not full service' centre.

The medical centre and medical retail are likely to host a range of medical and related tenancies that will cater to the sub-regional catchment that is presently patronising Forest Glen. The current provision of medical services within the sub-regional catchment is assessed as being largely in balance with GPs and medical centres located in most of the activity centres reviewed in this report. However, Forest Glen lacks a traditional medical centre and the projected increase in population and trends in the way health and medical services are provided means that the proposed medical centre is a good fit for the centre and catchment.

In the period 2016 to 2041, the sub-retail catchment is projected to increase by 59,000 people. At current rates of provision, this increase will generate demand for 70 Full-time service equivalent GPs. In practice, this demand will likely be fulfilled by 93 doctors working on a full time and part-time basis. To meet this level of projected demand, a new 11 GP medical centre will need to be opened every three years for the next 25 years in the defined sub-regional catchment. The introduction of a medical centre is considered to be a good fit for the actual role and function of the Forest Glen centre.

These features demonstrate the level of community economic need. The need for the proposed uses will only increase as the designated areas around the centre, and the defined sub-regional catchment are further developed.

1.5.2 Are the proposed uses appropriate for the site and catchment?

The Forest Glen Centre is not fulfilling the role intended by the planning scheme. While it is catering to visitors, the convenience tenancy mix is not adequate for the needs of PTA residents. The lack of a convenience supermarket is assessed as a major weakness of the precinct. The subject site is adjacent to the land zoned for the local centre and is an appropriate location to host the required expansion of the precinct.

1.5.3 Is the proposal consist with a 'local (not full service) activity centre'? Are the uses providing a local convenience function?

Planning for Forest Glen should reflect the current circumstances of the centre. The area serves two primary functions:

- A local centre that meets the needs of local residents and local workers.
- A speciality and destination retail precinct that caters to a more diverse patronage base (passing traffic, school traffic, local workers, regional residents).

Forest Glen has a total retail GFA of 6,500 Sq M and this is very large for a local (not full service) centre. Most of this GFA is assessed as specialised and destination retail of the type (organic supermarket etc.) that is not typically found in a local (not full service) centre. These specialised uses cater to a broad range of patrons including regional residents, passing traffic, school traffic and local workers. These groups are considered to be the 'visitors' defined as a target market for Forest Glen in the local plan.

The proposed uses (medical and convenience retail) are typical and appropriate uses for a local centre. In the case of the subject site, these uses are scaled to meet the needs of local residents and other groups that are presently patronising other services and facilities in the precinct.

1.5.4 Will the development undermine or compromise the activity centre network?

The introduction of a new retail centre will cause retail expenditure to be redistributed.

In 2021 (the assumed the first full year of operation) the local retail elements of the subject proposal are projected to have a total retail turnover of about $13m. This patronage will be transferred from the retail centres and other precincts that are presently being patronised by the future customers of the proposed retail facilities. The largest share of this transfer is estimated to be $5.2m from retailers in Buderim, and this is projected to generate an average impact of about 7%.

The Buderim Centre will continue to be a viable centre with the role and function intended by the planning scheme as the SA2s of Buderim North, and Buderim South are projected to increase in population to 38,471 in 2026 from 35,563 in 2019. The growth over this period will 'make good' all of the impacts generated by the subject site.

The balance of the impact will be dispersed across a large number of centres throughout the Sunshine Coast with the level of impact not being material in any single centre.

1.6 Conclusion

It is understandable that Sunshine Coast Council wishes to protect the future role and function of designated centres in the context of the proposed uses. Historically, Forest Glen has been an orphan centre that caters primarily to passing traffic. The presence of organic retailers, Chemist Warehouse and similar uses indicates the precinct trades well beyond role intended for a local (not full service) centre.

The proposed development will allow the increasing local residential population to be better serviced than is currently the case with no change to the intended role and function of any other centre.

2 INTRODUCTION

The purpose of this report is to determine the economic impacts of the proposed medical centre and shopping centre located at Mons Road, Forest Glen.

The proposed uses from part of a higher-level application which includes Lot 7 SP246654, Lot 8 RP810748 & Lot 14 SP295875. The masterplan development of these site will be delivered over three stages and this economic report considers the proposed Stage 1 uses.

2.1 Proposed Uses

The report addresses the following uses:

- Building 1: Shopping Centre, including a convenience supermarket and ancillary retail tenancies
  - Supermarket – 1,500m^2
  - Shop 1 – 120m^2
  - Shop 2 – 278m^2
- Building 2: Medical Retail Building – 600m^2
- Building 3: Medical centre – 2,341m^2

2.2 Scope of Works

The applicant has held a pre-lodgement meeting with Sunshine Coast Council, which identified several issues to be addressed by the economic report. These issues include:

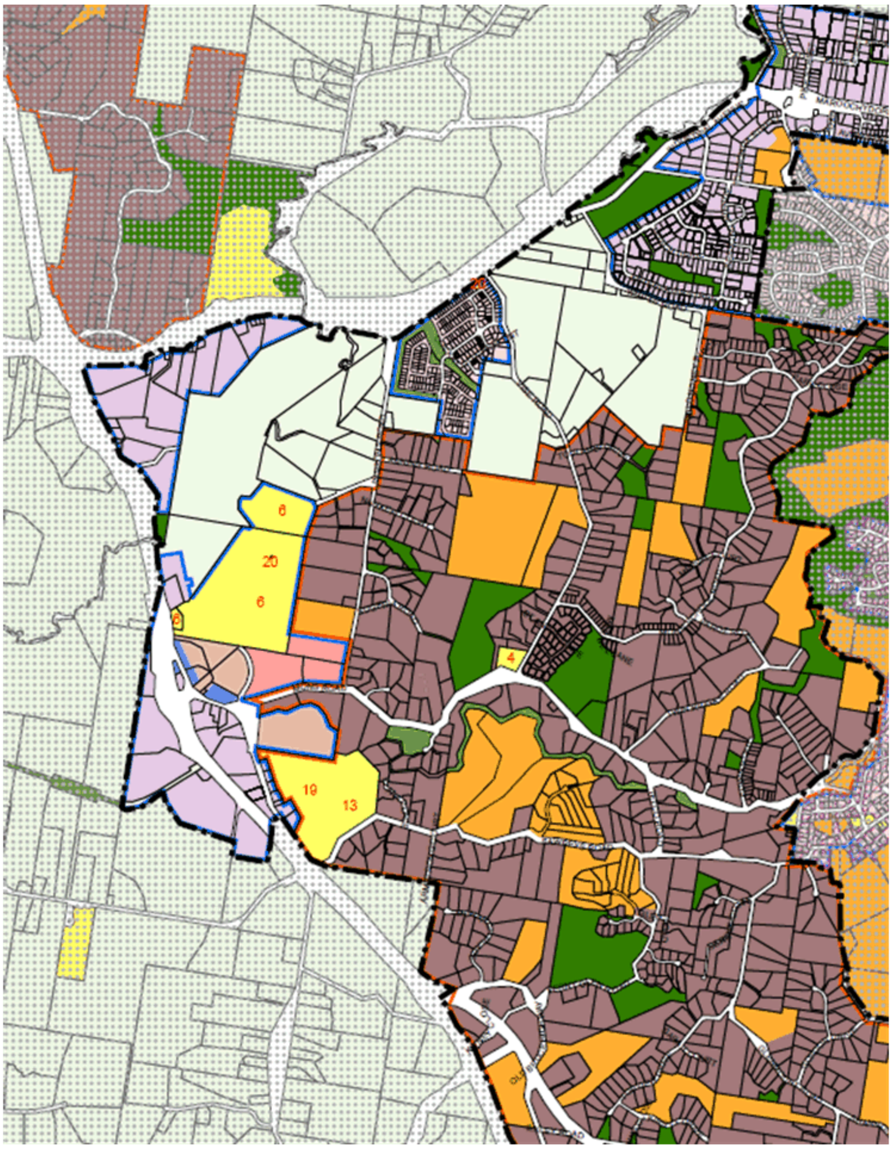
- Will the proposed uses would take Forest Glen beyond the 'local (not full service) activity centre' designation?
- Will the development undermine or compromise the activity centre network (with specific reference to Buderim) by proposing a higher order or larger scale of uses than intended for this activity centre?

3 PLANNING IMPLICATIONS

3.1 Forest Glen / Kunda Park / Tanawha Local Plan Area

The subject site is located at Forest Glen and is in the emerging community zone and is adjacent to the local centre zone. Refer to Figure 1. Forest Glen is the only designated centre in the Local Plan Area.

Figure 1 - Forest Glen/Kunda Park/Tanawha Local Plan Area (extract)



3.2 Sunshine Coast Planning Scheme

This report will be informed by the Sunshine Coast Planning Scheme and will utilise the definitions and designations contained in that document.

3.2.1 Forest Glen/Kunda Park/Tanawha Local Plan Code

The Forest Glen/Kunda Park/Tanawha Local Plan Code provides the following descriptions for the designated centre:

The Forest Glen Local Centre, located centrally within the Forest Glen Industrial Area, is a small local centre that includes a service station and a number of local shops. The local centre is laid out in a traditional main street configuration and provides a range of convenience goods and services that predominantly meet the needs of residents of surrounding rural and rural residential areas and visitors passing through the local plan area.[1]

and

(a) The Forest Glen Local Centre enhances its role and function as a local (not full service) activity centre providing for the day to day needs of residents of and visitors to the local plan area[2].

and

(e) Whilst development in the Local centre zone provides for the expansion and enhancement of business uses, residents continue to rely upon Buderim or other nearby larger centres to fulfil most of their business needs.

3.2.2 Local Centre Zone Code

The Local Centre Zone Code[3] provides the following descriptions for the scale and inclusions intended for a local centre:

(f) development provides for the following: -

(i) the total gross leasable floor area of all existing and approved business activities does not exceed any allocation specified for the activity centre in a local plan code;
(ii) a full line supermarket is established only in a local (full service) activity centre and not more than one full line supermarket is established in any local (full service) activity centre; and
(iii) higher order shopping facilities, including department stores and discount department stores, are not established in any local activity centre;

3.2.3 Definitions

The following definitions[4] are relevant to this analysis:

- Full line supermarket - A supermarket offering all or most major lines of groceries for sale and having a gross leasable floor area generally in excess of 2,500 Sq M.

[1] Forest Glen/Kunda Park/Tanawha local plan code 7.2.11.2 - Sunshine Coast Planning Scheme 2014

[2] Forest Glen/Kunda Park/Tanawha local plan code 7.2.11.3 - Sunshine Coast Planning Scheme 2014

[3] Local centre zone code 6.2.8.2(2) - Sunshine Coast Planning Scheme 2014

[4] Schedule 1 Definitions - Sunshine Coast Planning Scheme 2014

- Local (full service) activity centres - Provide for a wide range of local shopping, local employment, commercial, cafes and dining, entertainment, community services together with residential development where it can integrate and enhance the fabric of the activity centre.
- Local (not full service) activity centres - Provide a local convenience function only, accommodating small scale services and facilities and supporting the role of higher order activity centres in the activity centre network.

3.2.4 Implications

The current planning for Forest Glen is clear:

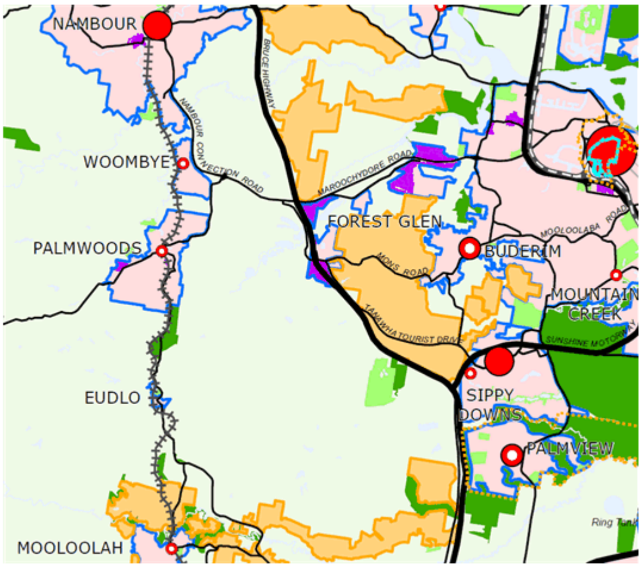
- The centre is a small Local (not full service) activity centre intended to serve the basic needs of residents in the immediate area and visitors passing through the local plan area.
- No new centres are to be established in the local plan area.

3.3 Strategic Framework

A review of the Strategic Framework indicates the range of centres that surround Forest Glen (refer to the following figure). The local plan code indicates that residents of Forest Glen are to rely on Buderim for higher order needs. The centres in the vicinity of Forest Glen are:

- Principal Regional Activity Centre – Maroochydore
- Major Regional Activity Centre – Nambour, Sippy Downs
- District Activity Centre – Palmview, Buderim
- Local (Full Service) Activity Centre –Woombye, Palmwoods, Mooloolah, Bli Bli and Chancellor Park
- Other local centres (not on the map) – North Buderim and Sippy Downs (2 at Scholars Dr and Stringybark Road).

Figure 2 - Strategic Framework Map 1 (extract)



3.4 Conclusion

The planning for Forest Glen intends that this area of the Sunshine Coast be serviced by a local (not full service) centre and the district centre at Buderim.

The mix of local land uses (including the school, industry and residential) means that the (long established) Forest Glen centre currently serves a role and function beyond that anticipated by the planning scheme. The local plan code provides the centre with three key features:

- The centre has a traditional main street configuration.
- The centre provides a range of convenience goods and services to meet the needs of residents in the surrounding areas.
- The centre provides a range of convenience goods and services to meet the needs of visitors passing through the local plan area.

The development of the Kunara Organic Marketplace site (in concert with other destination retail and related uses) means that the majority of retail and services at Forest Glen are destination retail and the precinct no longer has a dominant main street configuration.

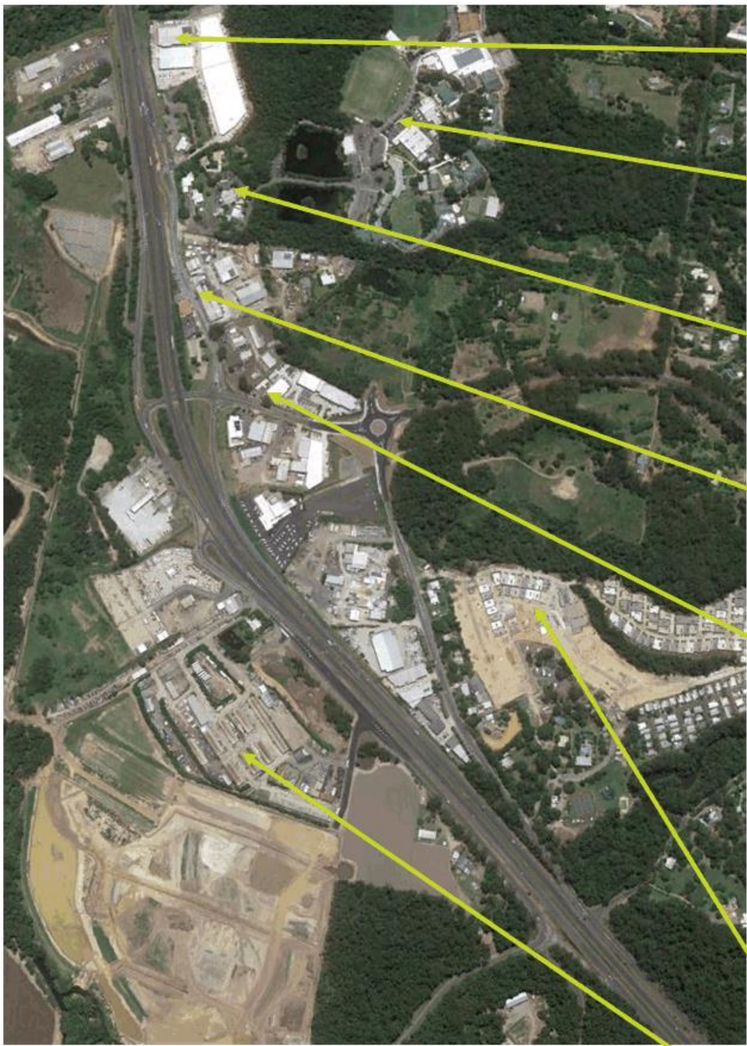
The local plan code accommodates that the centre will cater to the needs of visitors that are passing through the area. Given the scale of the industrial area, the proximity of a major school, and the level of traffic using Mons Road; the term 'visitors' in the context of Forest Glen is assessed as including these groups. Consequently, the centre should be scaled to meet the needs of these patrons.

4 SITE ASSESSMENT

Figure 3 illustrates the site and surrounding land uses. Aerial imagery has been sourced from Google.

The Forest Glen centre serves a range of patrons including local residents, local business, local workers and traffic drawn to (or through) the area for other reasons.

Figure 3 - Site Assessment



Local industrial businesses and the related workforce and customer base provide patronage for the retail and centre uses.

Sunshine Coast Grammar School has a regional catchment, and this traffic generates demand for local retail and centre uses.

The childcare centre extends the patronage base of the Forest Glen centre.

The main street hosts a range of retail and service providers that are typical for a small local centre.

Forest Glen also hosts a range of specialised uses (organic markets and Chemist Warehouse) that are not typically located in a small local centre. These uses cater to a broader catchment generated (in part) by the school traffic, the Bruce Highway access and traffic using Mons Road.

The population in the immediate area will increase as suitably zoned and/or approved sites are developed.

The area has a sizable industrial footprint and related workforce.

5 CENTRES - PATTERNS AND INCLUSIONS

This section provides an assessment of the existing centre infrastructure in the area surrounding Forest Glen. This will help to define the trade catchment. The focus of this analysis is the local centres and the types of retail uses (supermarkets and convenience retail) that shape the performance of these centres.

5.1 Centre Hierarchy

Figure 4 outlines the centres in the surrounding region by hierarchy and provides details of included supermarkets and convenience stores. Table 1 provides more detail.

Figure 4 - Activity Centres Network (with main supermarket or convenience stores)

Table 1 - Local Activity Centres

Centre	Location	Description	Implications
Forest Glen	David Low Way	The Forest Glen precinct has a retail GFA of approximately 6,500 Sq M: • Service Station – 80 Sq M • Retail Centre – 1,500 Sq M. Shops include; hairdresser, baker, speciality food, coffee, takeaway, travel agent, butcher and vacant stores. • Retail on the western side of Mons Road (BWS, general shop, fish and chips, crafts) – 480 Sq M • Chemist Warehouse – 320 Sq M • Pet Warehouse – 125 Sq M • 330 Mons Road (three buildings) – this site has a total of 2,775 Sq M ground floor GFA with an additional 1,200 Sq M in mezzanines. Uses include: ➢ Kunara Organic Marketplace ➢ Organic Cafe ➢ Sunshine Coast Organic Meats ➢ Fresh Holistic Health ➢ Micro-brewery • The precinct has an estimated 625 Sq M of vacant space About 1,000 Sq M of retail floorspace is occupied by uses typically found in a local centre.	The retail uses in the centre serve two distinct functions: • Uses typically found in a local centre. This includes the service station and the retail fronting Mons Road. The GFA of these shops is 1,000 Sq M. These uses are considered to be convenience retail. The precinct does not include a convenience supermarket. • Specialised retail and uses that that service a broader area and passing traffic. This includes; Chemist Warehouse, brewery and the organic/health uses located at 330 Mons Road. The GFA of these non-typical uses is 5,500 Sq M. A total of 4,500 Sq M is considered to be destination or large format retail with 1,000 Sq M occupied by other services (including medical).
Buderim		• Buderim Marketplace anchored by Woolworths – 3,890 Sq M • General street-based retail – 4,000 Sq M • Buderim IGA – 1,550 Sq M	The Buderim District centre will define the Forest Glen catchment and provide higher order services for residents of Forest Glen.
Buderim	Jones Drive	IGA anchored centre (2,180 Sq M) and other uses in the general area. An application for a supermarket anchored centre on the opposite side of Jones Road was refused by Council and is currently under appeal.	The Jones Drive centre will define the Forest Glen catchment.

Centre	Location	Description	Implications
Sippy Downs and Chancellor Park		• Sippy Downs Town Centre – currently a small retail footprint with a Coles supermarket and bottle shop. • Chancellor Park – a Woolworths anchored shopping centre with a GFA of 5,000 Sq M. The precinct also has large format retail. • Two local (not full service) centres are located at Stringybark Road and Scholars Drive.	These centres will define the Forest Glen catchment. When developed, Sippy Downs will be the most proximate Major Regional Activity Centre to Forest Glen.
Woombye, Palmwoods and Eudlo		Each of these centres is a collection of retail and related services that serve local residents.	These centres cater to the local needs of residents along the inland corridor and will define the Forest Glen catchment.

5.2 Implications

The Forest Glen catchment is defined by the presence of the local (full service) and higher order centres at Sippy Downs, Chancellor Park, Buderim, North Buderim, Woombye and Palmwoods.

When compared to these centres, Forest Glen has several distinctive attributes:

- The centre has a well-defined local residential catchment and primarily serves the traffic that uses Mons Road and the Bruce Highway interchanges.
- The precinct hosts a range of retail and services that are not typically found in a local (not full service) centre. These include Brewery, Chemist Warehouse and organic/health services.
- The non-typical retail, in conjunction with the Grammar School, industrial land and the traffic that uses Mons Road, establishes Forest Glen as an activity centre with extensive inflow patronage. The inflow patronage is generated from a broad area and is not considered to be a traditional catchment.

6 CATCHMENT DELINEATION

This section defines the Forest Glen catchment (refer to Figure 5). The catchment is shaped by the scale of the convenience (local) retail uses.

6.1 Trade Area Delineation

The Primary Trade Area East (PTAE) is defined as the area to the east of the Bruce Highway that has ready access to the Forest Glen centre. The Primary Trade Area West (PTAW) are those areas to the west of the Bruce Highway that are in proximity to Forest Glen. The PTAW includes two complete SA1's and part of SA1-3141408. It is assumed that 32% of this SA1 is located in the PTAW.

The balance of the patronage is assessed to be inflow expenditure, with the retail and services expenditure generated by residents from a large portion of the Sunshine Coast (including local workers, school-based traffic and traffic using Mons Road). In this context, a large part of the Forest Glen centre acts more as a highway service centre that caters to traffic generated by the Sunshine Coast Grammar School, the Bruce Highway entrances/exits, the industrial area and residents of Buderim using Mons Road.

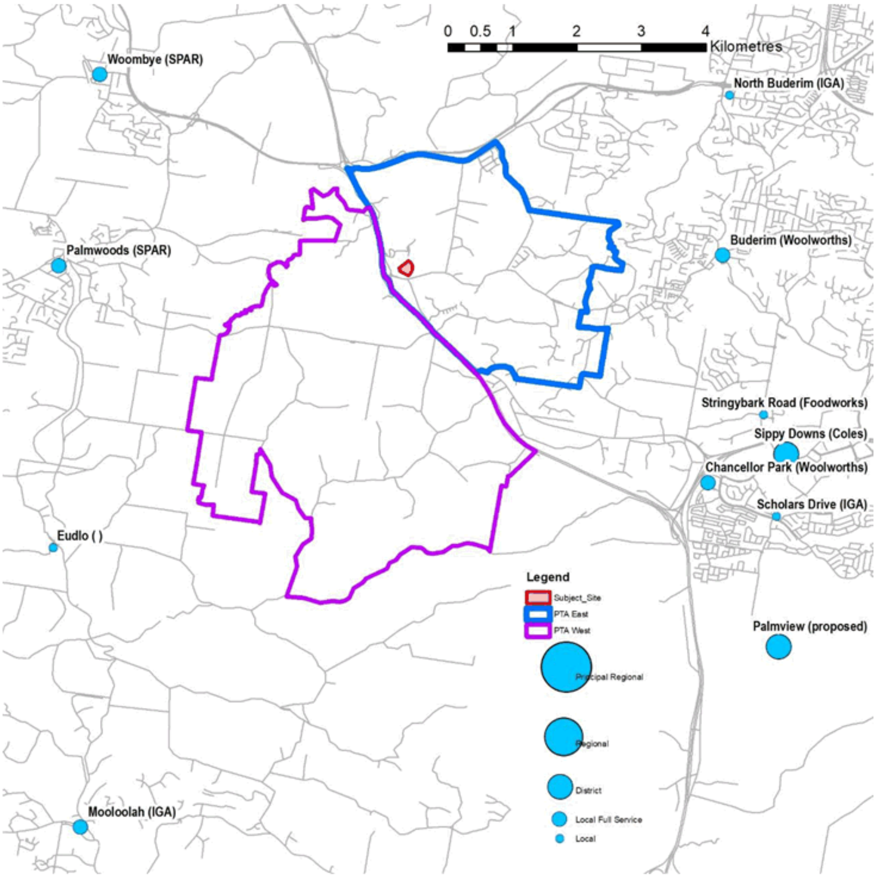
A Sub-Regional catchment has also been defined to represent the regional traffic that patronises businesses at Forest Glen. The sub-regional catchment includes the following Statistical Area 2 (SA2) and generally extends 6Km to 8Km from Forest Glen:

- Buderim - North
- Buderim - South
- Landsborough
- Palmwoods
- Diddillibah - Rosemount
- Nambour

The demographic features of these areas are detailed in Appendix A.

REPORT

Figure 5 - Catchment Delineation



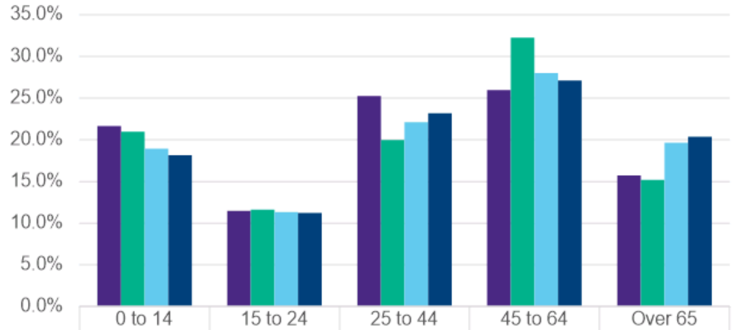
7 POPULATION AND DEMOGRAPHIC CHARACTERISTICS

This section provides an analysis of the key demographic features and population projections for the defined catchments. The level of anticipated growth and the demographic characteristics of the population will determine the level of demand for retail uses.

7.1 Demographic Characteristics

A detailed demographic profile is provided in Appendix A.

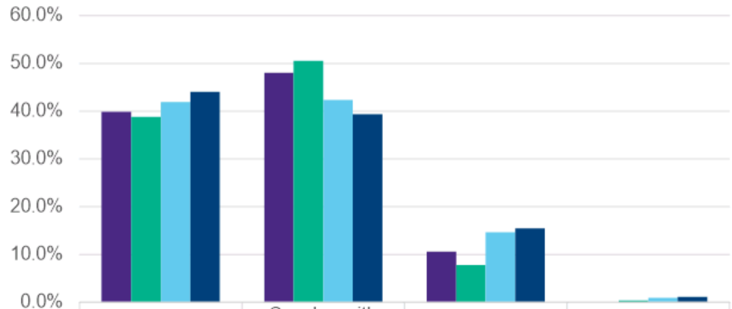
Age Distribution



	0 to 14	15 to 24	25 to 44	45 to 64	Over 65
PTA East	21.6%	11.5%	25.2%	25.9%	15.7%
PTA West	21.0%	11.6%	20.0%	32.3%	15.2%
Sub Regional Catchment	19.0%	11.3%	22.1%	28.0%	19.6%
Sunshine Coast	18.1%	11.2%	23.2%	27.1%	20.3%

The PTAE has the hallmarks of a growth suburb with concentrations of people aged 44 and under. The broader Sub Regional catchment and PTAW are more established areas with concentrations of people aged 45 and over.

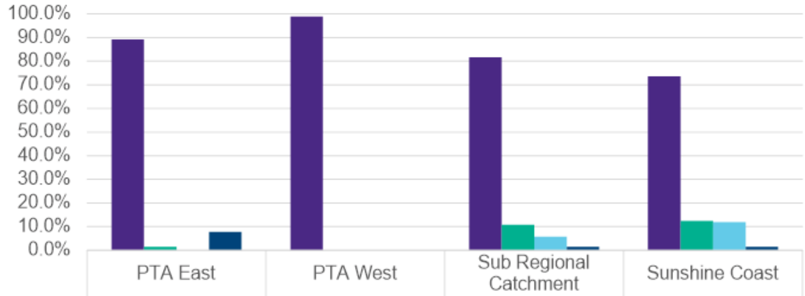
Household Structure



	Couple - no kids	Couple - with kids	One Parent	Other
PTA East	39.9%	48.0%	10.6%	0.0%
PTA West	38.8%	50.6%	7.9%	0.4%
Sub Regional Catchment	41.9%	42.4%	14.7%	1.0%
Sunshine Coast	44.0%	39.4%	15.5%	1.1%

Couples with children are the dominant group in the all of the defined catchments.

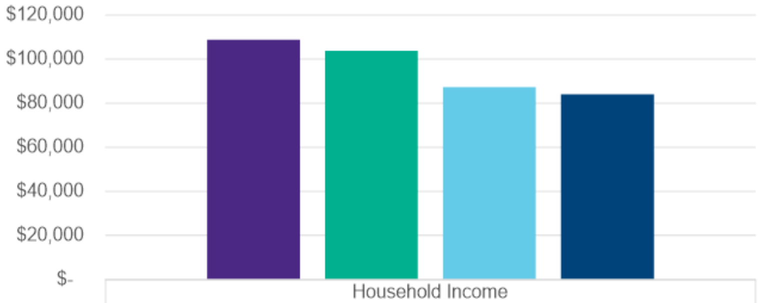
Dwelling Type



	PTA East	PTA West	Sub Regional Catchment	Sunshine Coast
Separate House	89.2%	98.9%	81.7%	73.6%
Semi Detached	1.4%	0.0%	10.8%	12.5%
Flat or apartment	0.0%	0.0%	5.7%	11.9%
Other	7.7%	0.0%	1.4%	1.5%

Separate houses are the dominant housing type in the defined areas.

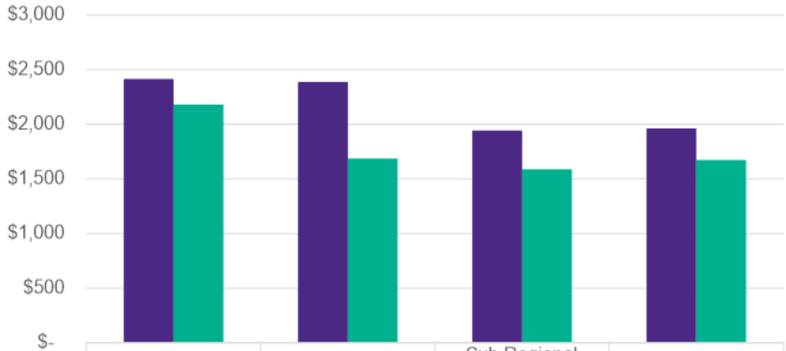
Income



	Household Income
PTA East	$108,824
PTA West	$103,742
Sub Regional Catchment	$87,258
Sunshine Coast	$84,150

Residents of the PTAE have an average household income that is 29% greater than the LGA average. Residents of the PTAW have an average household income that is 23% greater than the LGA average

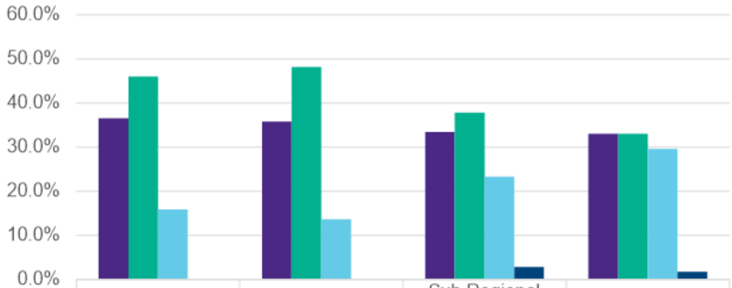
Rent and Mortgage



	PTA East	PTA West	Sub Regional Catchment	Sunshine Coast
Mortgage - Monthly	$2,416	$2,388	$1,943	$1,962
Rent - Monthly	$2,181	$1,686	$1,589	$1,673

The rents and mortgages of the catchments in comparison to the Sunshine Coast reflect the distribution of the average household incomes.

Household Ownership



	PTA East	PTA West	Sub Regional Catchment	Sunshine Coast
Fully owned	36.6%	35.8%	33.5%	33.1%
Being purchased directly	46.0%	48.2%	37.9%	33.1%
Rented	15.9%	13.6%	23.3%	29.6%
Other Tenure	0.0%	0.0%	2.9%	1.8%

The PTAE and PTAW are predominantly owner-occupied areas with lower proportions of rented dwellings when compared to the LGA average.

Conclusion

Demographically, the PTA's are above average income communities with a concentration of owner occupiers and a distribution of age and household groups that is younger than the Sunshine Coast average. People in these areas are typically mobile (high rates of car ownership), and many are time poor (working couples and raising children). These features will shape the need for retail and other services.

7.2 Population Projections

The anticipated population of the catchment areas will depend on how the remaining urban areas are developed. The remaining population capacity of the PTAE is detailed in Table 2. The PTAW is assessed as being at capacity. The figures in Table 2 consider the following:

- The approved development capacity of the Owen Creek Road and the Natures Edge manufactured home park.
- The estimated dwelling capacity of the land included in the Emerging Community and Medium Density zones.

At capacity, the PTAE is projected to have 1,297 dwellings that will house 3,480 people. The 600 projected new dwellings represent an 86% increase in the number of occupied dwellings in the PTAE compared to 2016 (refer to Table 3).

The Sub Regional catchment is projected to increase from 79,552 in 2016 to 115,668 in 2031. This is a total increase of 36,116 people or 2,408 per annum. This is detailed in Figure 6.

Table 2 - Development Capacity

Area	Notes	Dwellings	Household Size	Population
Natures Edge	297 Dwellings in total. 151 occupied in 2016. 47 and 71 Owen Creek Road.	146	1.80	263
Retirement Facility	134-158 Parsons Road and 286 Mons Road	177	1.60	283
5 Owen Creek Road	52 detached dwellings nad 38 terraces	90	2.60	234
Emerging Community and Medium Density	12.45 Ha of zoned land, 75% developable area and 24 dwellings per Ha.	187	2.60	486
Total		**600**		**1,266**

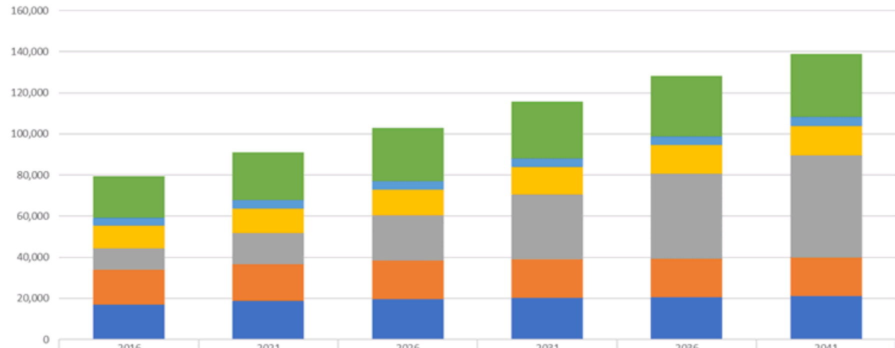
Source: RPS

Table 3 - Population Projections

Area	2016	2019	Capacity
PTA East			
People	2,214	2,325	3,480
Households	697	732	1,297
PTA West			
People	944	944	944
Households	280	280	280
PTA Total			
People	3,158	3,269	4,424
Households	977	1,012	1,577

Source: RPS

Figure 6 - Sub Regional Population Projections[5]



	2016	2021	2026	2031	2036	2041
Nambour	20,430	23,436	25,660	27,574	29,217	30,457
Diddillibah - Rosemount	3,839	4,103	4,229	4,307	4,373	4,437
Palmwoods	10,880	11,748	12,488	13,143	13,770	14,449
Landsborough	10,436	15,210	21,953	31,620	41,489	49,658
Buderim - South	16,890	17,965	18,708	18,807	18,682	18,765
Buderim - North	17,077	18,663	19,764	20,217	20,572	21,000

[5] Source: Queensland Government Statisticians Office, Medium Series projections 2018 ed.

8 EXPENDITURE AND MARKET SHARE ANALYSIS

The retail expenditure potential for the catchment areas is assessed as a means of determining the current and future demands for retail floorspace and related centre uses.

8.1 Retail Expenditure

Retail expenditure in the catchment areas is based on the 2016 ABS Census and the 2015/16 ABS Household Expenditure Survey. Appendix B indicates the average household retail expenditure in the catchment areas with Table 4 identifying the projected total retail expenditure of the catchments in 2019 and at capacity.

Table 4 - Retail Expenditure Projections

	Annual Household Expenditure	Annual Total Retail Expenditure - ($m)		Change 2019 to 2041 ($m)
		2019	Capacity at 2041	
PTA East	$30,292	$22.17	$39.29	$17.12
PTA West	$29,455	$8.25	$8.25	$0.00
Total		$30.42	$47.53	$17.12
Sub Regional	$26,531	$882.64	$1,416.02	$533.38

Source: RPS

8.2 Market Share Analysis

The retail floorspace required by the identified catchments will be distributed across a range of retail centres and precincts. Based on previous experience, RPS considers the following ranges to be generally indicative of current shopping patterns and the share of available retail expenditure:

- CBD and Main Street – 10% to 26%
- Regional Centres – 8% to 15%
- Sub-Regional Centres – 11% to 16%
- Supermarket Anchored Centres – 20% to 34%
- Convenience (local) Centres – 6% to 14%
- Bulky Goods (precinct and centres) – 20% to 30%
- Online - 2% to 6%

Forest Glen currently serves two retail functions. The first is a local centre for residents of the PTA, local workers and passing traffic with the second being as a sub-regional destination for specialised retail, services and facilities. The market share scenarios will consider each of these functions separately.

8.2.1 Local Market Share Assessment

This assessment is detailed in Table 5. Key factors include:

- In 2019, the 1,000 Sq M of local retail within the Forest Glen precinct is estimated to capture 8% of retail expenditure from PTA residents. This assessment allows that a similar amount of retail turnover will be generated from inflow sources, including local workers, passing traffic and regional residents.

- When the PTA reaches capacity, the market share derived from PTA residents is projected to increase to 18%. This expenditure will be directed to the current 1,000 Sq M of local retail and the 1,898 Sq M[6] of local retail that is proposed for the subject application. An 18% market share in this instance is considered reasonable given the size of the proposed supermarket (1,500 Sq M).

The introduction of a 1,500 Sq M supermarket and related retail (two tenancies with 120 Sq M and 278 Sq M) is considered to be a good fit for the intended local retail role and function of the Forest Glen centre.

Table 5 - Market Share Assessment, Local

Forest Glen Floorspace Demand - Local	2019	Capacity
PTA - Total		
Turnover	$30.42	$47.53
Market Share	8%	18%
PTA Turnover	$2.43	$8.56
Inflow		
Turnover	100%	100%
Market Share	$2.43	$8.56
Total		
Projected Turnover	$4.87	$17.11
Productivity Rate	$5,000	$6,000
Floorspace Demand	973	2,852

Source: RPS

8.2.2 Regional Market Share Assessment

This assessment is detailed in Table 6. Key factors include:

- In 2019, the 4,500 Sq M of destination retail within the Forest Glen precinct is estimated to capture 2% of retail expenditure from residents of the sub-regional catchment. This assessment illustrates the nature of many of the businesses presently located in Forest Glen that cater to low levels of regional demand and passing traffic.

- When the PTA reaches capacity, the market share derived from sub-regional catchment residents is projected to decline to 1.7%. The businesses at Forest Glen will be capturing a smaller share of a larger market as the population of the sub-regional catchment is projected to increase to 138,800 in 2041, this is an increase of 59,000 from 2016. This expenditure will be directed to the current 4,500 Sq M of destination retail and the 600 Sq M[7] of medical retail that is proposed for the subject application.

The introduction of a 600 Sq M of medical retail[8] is considered to be a good fit for the actual retail role and function of the Forest Glen centre.

[6] The subject application has a total retail GFA of 2,498 Sq M. The medical retail (600 Sq M) is assessed as performing a destination function with the 1,500 Sq M supermarket and other tenancies (120 Sq M and 278 Sq M) fulfilling a local retail function.

[7] IBID

[8] Medical retail is assessed to include a chemist, provision of medical and mobility devices, health food, supplements and similar uses.

Table 6 - Market Share Assessment, Regional

Forest Glen Floorspace Demand - Regional	2019	Capacity
Sub Regional		
Turnover	$882.64	$1,416.02
Market Share	2.0%	1.7%
PTA Turnover	$17.65	$24.07
Inflow		
Turnover	30%	30%
Market Share	$5.30	$7.22
Total		
Projected Turnover	$22.95	$31.29
Productivity Rate	$5,000	$6,000
Floorspace Demand	4,590	5,216

Source: RPS

8.2.3 Medical Centre

The medical centre is likely to host a range of medical and related tenancies. These may include:

- General practice with several doctors
- Dentist with several dentists
- Consulting rooms for specialists
- Physiotherapy (including a large gym-like floor area and equipment for rehabilitation)
- Gym, Yoga, Pilates
- Massage
- Personal training

The current provision of medical services within the sub-regional catchment is assessed as being largely in balance with GPs and medical centres located in most of the activity centres reviewed in this report. However, Forest Glen lacks a traditional medical centre and the projected increase in population and trends in the way health and medical services are provided means that the proposed medical centre is a good fit for the centre and catchment.

We can use the projected demand for GPs as a proxy to assess the future demand for health and wellbeing services.

In the period 2016 to 2041, the sub-retail catchment is projected to increase by 59,000 people. At current rates of provision, this increase will generate demand for 70 Full-time service equivalent GPs[9]. In practice, this demand will likely be fulfilled by 93 doctors working on a full time and part-time basis. To meet this level of projected demand a new 11 GP medical centre will need to be opened every three years for the next 25 years in the defined sub-regional catchment.

[9] According to the 'General Practice Statistics' issued by the Federal Department of Health, in 2017-18 the SA3 of the Sunshine Coast had 611 GPs with the Full Time Service Equivalent of 456. This equates to 1 GP per 634 and 850 residents respectively. Source: https://www.health.gov.au/internet/main/publishing.nsf/Content/General%20Practice%20Statistics-1

The introduction of a medical centre is considered to be a good fit for the actual role and function of the Forest Glen centre.

8.3 Impact Assessment

In 2021 (the assumed the first full year of operation) the local retail elements of the subject proposal are projected to have a total retail turnover of about $13m. This is projected to be derived from the following sources:

- $6.5m from inflow patrons that include regional residents, visitors and local workers.
- $6.5m from PTA residents. This will involve a transfer of $5.2m from retailers (primarily supermarkets) located in Buderim with the balance currently directed to other centres.

The transfer of $5.2m from retailers in Buderim in 2021 is projected to generate an average impact of about 7%. This is calculated as follows:

- Buderim is assessed as having 9,440 Sq M of retail space.
- The total turnover of this precinct is assessed to be $75.5m in 2021.
- This will decline to $70.3m once the subject site is operational.
- The SA2s of Buderim North and Buderim South are projected to increase in population to 38,471 in 2026 from 35,563 in 2019. The growth over this period will 'make good' and of the impacts generated by the subject site.

The Buderim Centre will continue to be a viable centre with the role and function intended by the planning scheme.

The balance of the impact will be dispersed across a large number of centres throughout the Sunshine Coast with the level of impact not being material in any single centre.

8.4 Conclusion

The market share, turnover analysis and related analysis indicate the following:

- The Forest Glen Centre is not fulfilling the role intended by the planning scheme. While it is catering to visitors, the convenience tenancy mix is not adequate for the needs of a portion of PTA residents. The lack of a convenience supermarket is assessed as a major weakness of the precinct.
- Forest Glen has a total retail GFA of 6,500 Sq M and this is very large for a local (not full service) centre. Most of this GFA is assessed as specialised and destination retail of the type (organic supermarket etc.) that is not typically found in a local (not full service) centre. These specialised uses cater to a broad range of patrons including regional residents, passing traffic, school traffic and local workers. These groups are considered to be the 'visitors' defined as a target market for Forest Glen in the local plan.
- The residents of the PTA have the potential to direct 18% of household expenditure to 'their' local centre. This potential is shaped by the relative accessibility of the centre for local residents and the scale of the proposed supermarket.
- Planning for Forest Glen should reflect the current circumstances of the centre. The area serves two primary functions:
  - A local centre that meets the needs of local residents and local workers.
  - A speciality and destination retail precinct that caters to a more diverse patronage base (passing traffic, school traffic, local workers, regional residents).

- The local residents can be better serviced if an appropriately scaled convenience supermarket (and related retail) is located in Forest Glen. The need for these uses will only increase as the designated areas around the centre are further developed.

9 NEEDS ASSESSMENT

A series of rapidly growing residential areas presents a range of challenges for planning authorities. This task is further complicated by the rapid evolution of retail trends and the way in which people shop and use activity centres. The proposed Mons Road development, with the mix of medical facilities, convenience retail and a convenience supermarket, builds upon the role and function of the established retailers in the precinct

9.1 Community Need

At capacity, the PTA will have a population of over 4,400 people with much of the population growth occurring near the Forest Glen centre. As intended by the planning scheme, this population should be serviced by a local centre.

At a local level, the PTA is an above average income community with a concentration of owner occupiers and a distribution of age and household groups that is younger than the Sunshine Coast average. These features indicate the local residents are:

- Time poor – patronising convenience retail and takeaway food.
- Users of childcare facilities at above average rates.
- Loyal patrons of suitable local facilities.

The inclusion of a convenience supermarket and related retail in the centre is entirely consistent with the needs of the community and the objectives of the planning scheme. The proposed 1,500 Sq M supermarket is smaller than a full line supermarket and is a good fit for a local ‘not full service’ centre.

The medical centre and medical retail are likely to host a range of medical and related tenancies that will cater to the sub-regional catchment that is presently patronising Forest Glen. The current provision of medical services within the sub-regional catchment is assessed as being largely in balance with GPs and medical centres located in most of the activity centres reviewed in this report. However, Forest Glen lacks a traditional medical centre and the projected increase in population and trends in the way health and medical services are provided means that the proposed medical centre is a good fit for the centre and catchment.

In the period 2016 to 2041, the sub-retail catchment is projected to increase by 59,000 people. At current rates of provision, this increase will generate demand for 70 Full-time service equivalent GPs. In practice, this demand will likely be fulfilled by 93 doctors working on a full time and part-time basis. To meet this level of projected demand a new 11 GP medical centre will need to be opened every three years for the next 25 years in the defined sub-regional catchment. The introduction of a medical centre is considered to be a good fit for the actual role and function of the Forest Glen centre.

These features demonstrate the level of community economic need. The need for the proposed uses will only increase as the designated areas around the centre, and the defined sub-regional catchment are further developed.

9.2 Are the proposed uses appropriate for the site and catchment?

The Forest Glen Centre is not fulfilling the role intended by the planning scheme. While it is catering to visitors, the convenience tenancy mix is not adequate for the needs of PTA residents. The lack of a convenience supermarket is assessed as a major weakness of the precinct. The subject site is adjacent to the land zoned for the local centre and is an appropriate location to host the required expansion of the precinct.

9.3 Is the proposal consist with a ‘local (not full service) activity centre’?

Planning for Forest Glen should reflect the current circumstances of the centre. The area serves two primary functions:

- A local centre that meets the needs of local residents and local workers.
- A speciality and destination retail precinct that caters to a more diverse patronage base (passing traffic, school traffic, local workers, regional residents).

Forest Glen has a total retail GFA of 6,500 Sq M and this is very large for a local (not full service) centre. Most of this GFA is assessed as specialised and destination retail of the type (organic supermarket etc.) that is not typically found in a local (not full service) centre. These specialised uses cater to a broad range of patrons including regional residents, passing traffic, school traffic and local workers. These groups are considered to be the 'visitors' defined as a target market for Forest Glen in the local plan.

The proposed uses (medical and convenience retail) are typical and appropriate uses for a local centre. In the case of the subject site, these uses are scaled to meet the needs of local residents and other groups that are presently patronising other services and facilities in the precinct.

9.4 Will the development undermine or compromise the activity centre network?

The introduction of a new retail centre will cause retail expenditure to be redistributed.

In 2021 (the assumed the first full year of operation) the local retail elements of the subject proposal are projected to have a total retail turnover of about $13m. This patronage will be transferred from the retail centres and other precincts that are presently being patronised by the future customers of the proposed retail facilities. The largest share of this transfer is estimated to be $5.2m from retailers in Buderim, and this is projected to generate an average impact of about 7%.

The Buderim Centre will continue to be a viable centre with the role and function intended by the planning scheme as the SA2s of Buderim North, and Buderim South are projected to increase in population to 38,471 in 2026 from 35,563 in 2019. The growth over this period will 'make good' and of the impacts generated by the subject site.

The balance of the impact will be dispersed across a large number of centres throughout the Sunshine Coast with the level of impact not being material in any single centre.

9.5 Conclusion

It is understandable that Sunshine Coast Council wishes to protect the future role and function of designated centres in the context of the proposed uses. Historically, Forest Glen has been an orphan centre that caters primarily to passing traffic. The presence of organic retailers, Chemist Warehouse and similar uses indicates the precinct trades well beyond role intended for a local (not full service) centre.

The proposed development will allow the increasing local residential population to be better serviced than is currently the case with no change to the intended role and function of any other centre.

APPENDIX A – DEMOGRAPHIC PROFILE

Demographic Profile	PTA East		PTA West		Sub Regional Catchment		Sunshine Coast	
Total Persons	2,214		944		77,419		294,367	
Age								
0 to 4	144	6.5%	47	5.0%	4,133	5.3%	15,659	5.3%
5 to 14	336	15.1%	150	16.0%	10,539	13.6%	37,720	12.8%
15 to 19	151	6.8%	67	7.1%	4,894	6.3%	17,698	6.0%
20 to 24	104	4.7%	42	4.5%	3,863	5.0%	15,316	5.2%
25 to 34	280	12.6%	66	7.0%	7,427	9.6%	31,195	10.6%
35 to 44	280	12.6%	121	12.9%	9,686	12.5%	37,079	12.6%
45 to 54	316	14.2%	170	18.1%	11,322	14.6%	41,119	14.0%
55 to 64	260	11.7%	133	14.2%	10,351	13.4%	38,678	13.1%
65 to 74	244	11.0%	101	10.8%	8,446	10.9%	33,866	11.5%
75 to 84	91	4.1%	28	3.0%	4,627	6.0%	18,330	6.2%
85 years and over	14	0.6%	13	1.4%	2,126	2.7%	7,706	2.6%
Language Spoken at Home								
English Only	1,950	94.4%	846	96.4%	69,794	95.1%	262,574	94.7%
Other	115	5.6%	32	3.6%	3,559	4.9%	14,832	5.3%
Household Structure								
Couple family with no children	244	39.9%	102	38.8%	8,909	41.9%	35,444	44.0%
Couple family with children under 15	218	35.6%	87	33.1%	6,128	28.8%	22,286	27.7%
Couple family with no children under 15	80	13.1%	43	16.2%	2,863	13.5%	9,383	11.7%
Couple family with children - total	294	48.0%	133	50.6%	9,001	42.4%	31,668	39.4%
One parent family with children under 15	28	4.6%	9	3.4%	1,700	8.0%	6,614	8.2%
One parent family with no children under 15	36	5.9%	12	4.6%	1,436	6.8%	5,828	7.2%
One parent family	65	10.6%	21	7.9%	3,129	14.7%	12,447	15.5%
Other family	0	0.0%	1	0.4%	204	1.0%	915	1.1%
Total Families	612		263		21,244		80,469	
Household Income								
Average Weekly - Sept 2016 $	$ 2,007		$ 1,913		$ 1,609		$ 1,552	
Average Weekly - Current $	$ 2,087		$ 1,990		$ 1,674		$ 1,614	
Average Annual - Sept 2016 $	$ 104,627		$ 99,742		$ 83,893		$ 80,905	
Average Annual - Current $	$ 108,824		$ 103,742		$ 87,258		$ 84,150	
Average Number of Cars	2.08		2.58		1.91		1.81	
Mortgage Repayment - Monthly								
Average Repayment - Sept 2016 $	$ 2,322.90		$ 2,295.56		$ 1,868.06		$ 1,886.38	
Average Repayment - Current $	$ 2,416.07		$ 2,387.63		$ 1,942.98		$ 1,962.05	
Rent - Weekly								
Rent - Sept 2016 $	$ 483.81		$ 374.05		$ 352.52		$ 371.30	
Rent - Current $	$ 503.21		$ 389.05		$ 366.66		$ 386.19	
Persons per Household								
Separate house	3.00		3.17		2.80		2.75	
Semi detached row or terrace house townhouse etc with One storey	3.50		N/A		1.60		1.67	
Semi detached row or terrace house townhouse etc with Two or more storeys	N/A		N/A		2.01		2.08	
Semi detached row or terrace house townhouse etc with Total	3.80		N/A		1.75		1.84	
Flat or apartment in a one or two storey block	N/A		N/A		1.50		1.76	
Flat or apartment in a three storey block	N/A		N/A		1.90		1.84	
Flat or apartment in a four or more storey block	N/A		N/A		2.38		1.87	
Flat or apartment Attached to a house	N/A		N/A		1.33		1.57	
Flat or apartment Total	N/A		N/A		1.68		1.82	
Other dwelling Caravan	2.33		N/A		1.77		1.59	
Other dwelling Cabin houseboat	1.55		N/A		1.47		1.43	
Other dwelling Improvised home tent sleepers out Dwellings	N/A		N/A		4.75		2.00	
Other dwelling House or flat attached to a shop office etc Dwellings	N/A		N/A		4.00		2.64	
Other dwelling Total Dwellings	1.52		N/A		1.55		1.59	
Dwelling structure not stated	1.36		3.33		2.36		2.01	
Total Dwellings	2.87		3.17		2.60		2.51	
Dwelling Structure								
Separate house	622	89.2%	277	98.9%	22,650	81.7%	79,971	73.6%
Semi detached row or terrace house townhouse etc with One storey	10	1.4%	0	0.0%	1,872	6.8%	7,919	7.3%
Semi detached row or terrace house townhouse etc with Two or more storeys	0	0.0%	0	0.0%	1,123	4.1%	5,609	5.2%
Semi detached row or terrace house townhouse etc with Total	10	1.4%	0	0.0%	2,990	10.8%	13,524	12.5%
Flat or apartment in a one or two storey block	0	0.0%	0	0.0%	1,132	4.1%	4,956	4.6%
Flat or apartment in a three storey block	0	0.0%	0	0.0%	177	0.6%	2,492	2.3%
Flat or apartment in a four or more storey block	0	0.0%	0	0.0%	253	0.9%	5,418	5.0%
Flat or apartment Attached to a house	0	0.0%	0	0.0%	21	0.1%	56	0.1%
Flat or apartment Total	0	0.0%	0	0.0%	1,581	5.7%	12,917	11.9%
Other dwelling Caravan	9	1.3%	0	0.0%	74	0.3%	810	0.7%
Other dwelling Cabin houseboat	42	6.0%	0	0.0%	284	1.0%	666	0.6%
Other dwelling Improvised home tent sleepers out Dwellings	0	0.0%	0	0.0%	4	0.0%	41	0.0%
Other dwelling House or flat attached to a shop office etc Dwellings	0	0.0%	0	0.0%	12	0.0%	76	0.1%
Other dwelling Total Dwellings	54	7.7%	0	0.0%	381	1.4%	1,586	1.5%
Dwelling structure not stated	11	1.6%	3	1.1%	118	0.4%	590	0.5%
Total Occupied Dwellings	697	100.0%	280	100.0%	27,720	100.0%	108,588	100.0%
Occupied private dwellings	697	90.6%	280	94.2%	27,720	92.6%	108,588	88.9%
Unoccupied private dwellings	67	8.7%	12	4.0%	2,220	7.4%	13,560	11.1%
Total private dwellings	769		297		29,945		122,145	
Dwelling Ownership								
Fully owned	256	36.6%	100	35.8%	9,283	33.5%	35,913	33.1%
Being purchased directly	322	46.0%	135	48.2%	10,503	37.9%	35,902	33.1%
Rented	111	15.9%	38	13.6%	6,462	23.3%	32,125	29.6%
Other Tenure	0	0.0%	0	0.0%	791	2.9%	1,959	1.8%
Not Stated	7	1.0%	13	4.7%	701	2.5%	2,685	2.5%
Total	700		279		27,733		108,589	

Source: ABS 2016 Census. All figures in March 2019 dollars

APPENDIX B – HOUSEHOLD EXPENDITURE PROFILE

	PTAE	PTAW	Sub Regional	Sunshine Coast
Convenience				
Alcohol for consumption off licensed premises	$23.84	$23.07	$20.25	$19.72
Books, newspapers, magazines etc	$6.54	$6.37	$5.61	$5.47
Dry Cleaning and clothing services	$0.76	$0.73	$0.60	$0.57
Food and non-alcoholic beverages	$166.58	$164.01	$153.90	$152.00
Household non-durables	$18.16	$17.73	$16.30	$16.03
Lottery and Lotto	$4.19	$4.13	$3.91	$3.87
Medicines, pharmaceutical products etc	$18.09	$17.99	$17.82	$17.79
Personal care	$30.87	$29.92	$27.15	$26.63
Stationery equipment	$5.16	$5.01	$4.53	$4.44
Tobacco products	$12.35	$12.20	$11.32	$11.16
Weekly Sub Total	$286.53	$281.15	$261.40	$257.67
Annual Sub Total	$14,899.82	$14,619.87	$13,592.67	$13,399.04
Derived Supermarket Expenditure (includes 13% for general merchandise)				
Weekly Sub Total	*$257.59*	*$252.97*	*$235.80*	*$232.57*
Annual Sub Total	*$13,394.87*	*$13,154.34*	*$12,261.77*	*$12,093.52*
Clothing and footwear				
Weekly Sub Total	$43.65	$41.95	$36.56	$35.54
Annual Sub Total	$2,269.76	$2,181.16	$1,900.97	$1,848.15
Large Format / Destination Retailers				
Audio-visual equipment and parts	$8.45	$8.25	$7.80	$7.71
AV Media	$5.21	$4.95	$3.95	$3.76
Camping, Sports and Toys	$12.71	$11.92	$9.52	$9.07
Communication Equipment	$2.35	$2.37	$2.43	$2.45
Home computer equipment	$6.75	$6.44	$5.24	$5.02
Household furnishings and equipment	$57.80	$56.34	$51.44	$50.51
Motor vehicle parts and accessories	$12.45	$12.28	$12.01	$11.96
Repairs and maintenance (materials only)	$14.59	$14.29	$13.39	$13.22
Weekly Sub Total	$120.31	$116.84	$105.78	$103.69
Annual Sub Total	$6,255.97	$6,075.63	$5,500.48	$5,392.06
Other Retail				
Animal expenses	$17.90	$17.35	$15.53	$15.19
Other recreational and educational equipment	$1.80	$1.74	$1.57	$1.54
Repair and maintenance of household durables	$3.17	$3.14	$2.99	$2.96
Watches, Jewellery and Misc	$23.37	$22.14	$17.04	$16.07
Weekly Sub Total	$46.23	$44.37	$37.12	$35.76
Annual Sub Total	$2,403.99	$2,307.34	$1,930.46	$1,859.42
Food and Beverage				
Alcohol for consumption on licensed premises	$10.53	$9.97	$7.82	$7.41
Meals out and fast foods	$75.29	$72.16	$61.54	$59.54
Weekly Sub Total	$85.82	$82.13	$69.36	$66.95
Annual Sub Total	$4,462.85	$4,270.76	$3,606.79	$3,481.63
Weekly Total Household Retail Expenditure	**$582.55**	**$566.44**	**$510.22**	**$499.62**
Annual Total Houshold Retail Expenditure	**$30,292.38**	**$29,454.75**	**$26,531.36**	**$25,980.29**

Source: RPS (includes data from ABS Household Expenditure Survey 2015/16)
Note: All figures in March 2019 dollars

MONS ROAD, FOREST GLEN

Economic Response to Information Request

PR137863
Mons Road, Forest Glen
V1.0
19 December 2019

rpsgroup.com

REPORT

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REPORT

1 SUMMARY

The purpose of this report is to address the economic and needs issues raised by Sunshine Coast Council in the Information Request dated 16 August 2019.

This report is to be read in conjunction with the submitted Economic Impact Assessment, prepared by RPS and dated 14 June 2019.

1.1 Revised Plan

This report will address the uses proposed for Precincts H and J noting that the proposed GFA's in these precincts have been modified from the original application. The components to be assessed include:

- Showroom, Shop and Market in Precinct H with a maximum of 900 Sq M of total GFA of which up to 200 Sq M can be utilised as a shop.
- Indoor Sport & Recreation in Precinct J of 1,000 Sq M.

It is noted the childcare centre has been removed from the application and will not be addressed in this report.

1.2 Functional Assessment

The additional shop, showroom and indoor sport and recreation GFA proposed for the Mons Road centre are in line with the extended role and function currently in place in the precinct. While showrooms and indoor sport and recreation uses are not always included in local centres, they are considered to be a natural inclusion in the subject precinct. This is due to the current supply of regional and large format retail (showrooms) and other services and facilities that are already located in (or near) the designated centre. Key points include:

- The addition of 200 Sq M of shop in Precinct H will increase the total retail (shop) GFA in the Mons Road Centre to 3,700 Sq M. This is a 5.7% increase over the amount assessed in the original economic report. It is assumed that the 200 Sq M of shop GFA will be occupied by retail uses typically found in a local centre.
- The addition of 900 Sq M of showroom in Precinct H will increase the total specialised retail and other uses GFA in the Mons Road Centre to 8,741 Sq M. It is assumed that the 900 Sq M of showroom GFA will be occupied by large format retail uses attracted to the precinct by the location and diversity of the existing and proposed businesses.
- The addition of 1,000 Sq M of indoor sport and recreation GFA is in keeping with the diversity of uses that are currently located in (or near) the centre and include the Grammar School, industrial land and a diverse range of businesses located to the south of Mons Road.

1.3 Need

The need for the proposed uses is summarised as follows:

- The addition of 200 Sq M of shop is s minor increase in the overall amount of convenience retail. The benefits and need of which were defined in the original EIA and include the greater provision of local retail for local residents.
- The provision of 900 Sq M of showroom fulfils the current function of the overall precinct and is justified on the basis of location and regional population growth.
- The inclusion of Indoor Sport and Recreation in the subject precinct is justified by the demands of a growing regional population and the current characteristics of the Mons Road Precinct. Growth in need for Indoor Sport and Recreation floorspace can be conservatively linked to the expected population

growth in the Sunshine Coast LGA; on this basis, 47 new net fitness/health businesses will be required on the Sunshine Coast in the period 2021 to 2031 (or 4.7 new businesses per annum).

1.4 Conclusion

An additional 200 Sq M of shop GFA and 900 Sq M of showroom GFA is assessed to be a minor increase in the existing and planned scale of the Mons Road centre as addressed in the original EIA.

In the case of the 200 Sq M of shop GFA in Precinct H, the overall amount of impact is expected to be small and will be contained in the impact assessment detailed in the original EIA.

The 900 Sq M of retail showrooms in Precinct H are expected to cater to a broader regional catchment and the impact will be dispersed across a large number of centres throughout the Sunshine Coast with the level of impact not being material in any single centre.

It is assessed that any indoor sport and recreation businesses located on the subject site will not cater exclusively to a small local catchment. However, these operations may (depending on the business) draw a reasonable proportion of trade from local residents. It is considered valid to assess the future level of need and demand for indoor sport and recreation uses based on a larger catchment that consists of the Sunshine Coast LGA as the future business are likely to provide a specialised offering that caters to an extended catchment (similar to many of the other uses currently located in Forest Glen). The subject site is well located to service the smaller towns and rural areas of the Sunshine Coast as many of the current Indoor Sport and Recreation businesses are located in major centres and industrial areas.

All designated centres on the Sunshine Coast (including the Buderim Centre) will continue to be viable. The capacity of these centres to fulfil the role and function intended by the planning scheme will not be impacted by the proposed additional shop and showroom floorspace.

2 INTRODUCTION

The purpose of this report is to address the economic and needs issues raised by Sunshine Coast Council in the Information Request dated 16 August 2019.

This report is to be read in conjunction with the submitted Economic Impact Assessment, prepared by RPS and dated 14 June 2019.

2.1 Information Request

The information request required that the Economic Needs Assessment report be amended to include the following uses:

- Childcare Centre in Precinct G of 1,500m²;
- Showroom, Shop and Market in Precinct H of 2,250m²; and
- Indoor Sport & Recreation in Precinct J of 1,000m².

2.2 Revised Plan

This report will address the uses proposed for Precincts H and J noting that the proposed GFA's in these precincts have been modified from the original application. The components to be assessed include:

- Showroom, Shop and Market in Precinct H with a maximum of 900 Sq M of total GFA of which up to 200 Sq M can be utilised as a shop.
- Indoor Sport & Recreation in Precinct J of 1,000 Sq M.

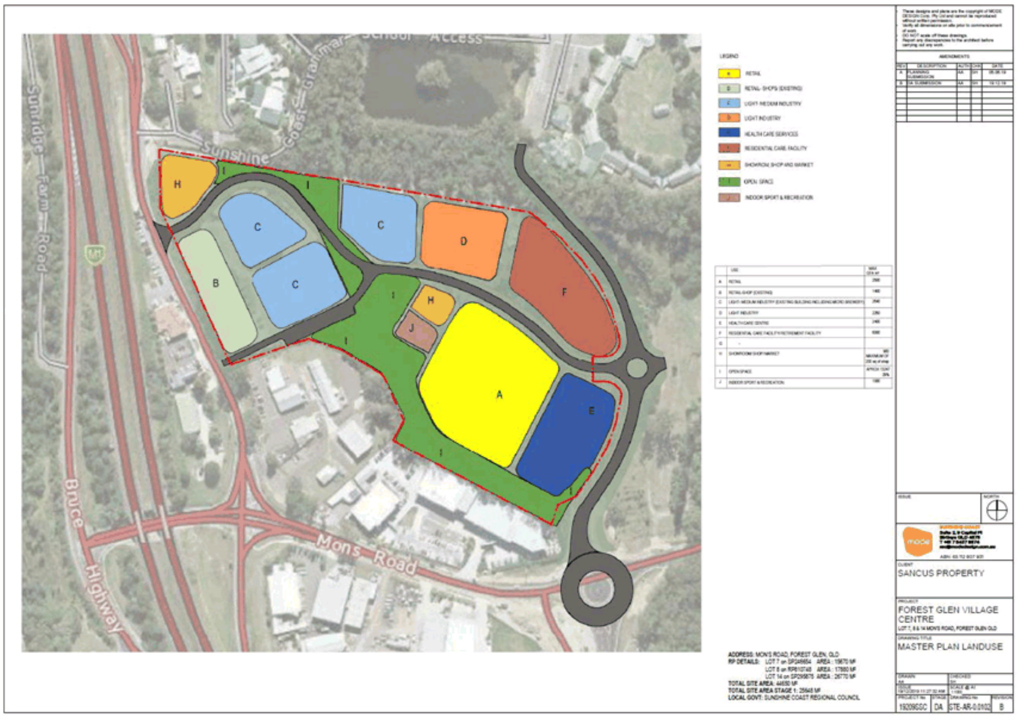
It is noted the childcare centre has been removed from the application and will not be addressed in this report.

The revised masterplan and GFA is detailed in the following Table and Figure.

Table 1 - Revised Masterplan GFA

	Use	GFA (Sq M)	Notes
A	Retail	2500	
B	Retail Shop – Existing	1400	
C	Light Medium Industry – Existing	2640	
D	Light Industry	2550	Increased from 1200 in the original application
E	Health Care Centre	2400	
F	Residential Aged Care/Retirement Facility	6000	
H	Showroom/Shop/Market	900 max of 200 Sq M shop	To be assessed in this report
J	Indoor Sport and Recreation	1000	To be assessed in this report

Figure 1 - Revised Masterplan



2.3 Conclusion

The following will be assessed in response to the information request:

- The economic issues related to the provision of 1,000 Sq M of Indoor Sport and Recreation in Precinct J.
- The economic issues related to the provision of 900 Sq M of Showrooms in Precinct H – this assumes all of the available GFA will be utilised for showrooms.
- The economic issues related to the provision of 200 Sq M of Shop in Precinct H - this assumes the amount for shop floorspace will be maximised (200 Sq M) with the balance developed as showrooms (700 Sq M).

3 FUNCTIONAL ASSESSMENT

3.1 Original Assessment

The Forest Glen centre was assessed in the Original EIA as having several distinct attributes[1]:

- The centre has a well-defined local residential catchment and primarily serves the traffic that uses Mons Road and the Bruce Highway interchanges.
- The precinct hosts a range of retail and services that are not typically found in a local (not full service) centre. These include Brewery, Chemist Warehouse and organic/health services.
- The non-typical retail, in conjunction with the Grammar School, industrial land and the traffic that uses Mons Road, establishes Forest Glen as an activity centre with extensive inflow patronage. The inflow patronage is generated from a broad area and is not considered to be a traditional catchment.

Further, the Forest Glen Centre was found to have a total retail GFA of 6,500 Sq M with two distinct retail functions[2]:

- Uses typically found in a local centre. This includes the service station and the retail fronting Mons Road. The GFA of these shops is 1,000 Sq M. These uses are considered to be convenience retail. The precinct does not include a convenience supermarket.
- Specialised retail and uses that that service a broader area and passing traffic. This includes; Chemist Warehouse, brewery and the organic/health uses located at 330 Mons Road. The GFA of these non-typical uses is 5,500 Sq M. A total of 4,500 Sq M is considered to be destination or large format retail with 1,000 Sq M occupied by other services (including medical).

3.2 Additional Assessment

- The addition of 200 Sq M of shop in Precinct H will increase the total retail (shop) GFA in the Mons Road Centre to 3,700 Sq M. This is a 5.7% increase over the amount assessed in the original economic report. It is assumed that the 200 Sq M of shop GFA will be occupied by retail uses typically found in a local centre.
- The addition of 900 Sq M of showroom in Precinct H will increase the total specialised retail and other uses GFA in the Mons Road Centre to 8,741 Sq M. It is assumed that the 900 Sq M of showroom GFA will be occupied by large format retail uses attracted to the precinct by the location and diversity of the existing and proposed businesses.
- The addition of 1,000 sq M of indoor sport and recreation GFA is in keeping with the diversity of uses that are currently located in (or near) the centre and include the Grammar School, industrial land and a diverse range of businesses located to the south of Mons Road.

The current scale of the Mons Road centre and the proposed inclusions are detailed in the following table.

[1] Mons Road Forest Glen Economic Impact Assessment, RPS, 14 June 2019, Section 5.2.

[2] Mons Road Forest Glen Economic Impact Assessment, RPS, 14 June 2019, Table 1.

Table 2 - Mons Road Centre Uses

Uses	Current	Assessed in the original economic Report	Assessed in this report.	Total (if approved)
Retail (typical local centre uses)	1,000 Sq M	2,500 Sq M (including supermarket)	200 Sq M of Shop	• 3,700 Sq M • This is assessed as including 3,100 Sq M of local retail after the 600 Sq M of medial retail is excluded (this is assessed as performing a regional function). • This compares to the 2,900 Sq M assessed in the original EIA.
Specialised retail and other uses	5,500 Sq M - with 4,500 Sq M of Large Format Retail /Showroom and 1,000 Sq M of other uses (inc medical)	2,341 Sq M Medical Centre	Up to 900 Sq m of showroom (large format retail)	• 8,741 Sq M • This is assessed as including 6,000 Sq M of regional retail (4,500 of current showrooms, 600 Sq M of medical retail and 900 Sq M of showrooms planned for Precinct H). • This compares to the 5,100 Sq M assessed in the original EIA.
Indoor Sport and Recreation	Nil	Nil	1,000 Sq M	• 1,000 Sq M

3.3 Assessment

The additional shop, showroom and indoor sport and recreation GFA proposed for the Mons Road centre are in line with the extended role and function currently in place in the precinct.

While showrooms and indoor sport and recreation uses are not always included in local centres, they are considered to be a natural inclusion in the subject precinct. This is due to the current supply of regional and large format retail (showrooms) and other services and facilities that are already located in (or near) the designated centre.

4 SHOP AND SHOWROOM ASSESSMENT

Forest Glen currently serves two retail functions. The first is a local centre for residents of the PTA, local workers and passing traffic with the second being as a sub-regional destination for specialised retail, services and facilities.

4.1 Shop Assessment – Local Retail

The inclusion of the 200 Sq M of shop in Precinct H means that the Mons Road centre will have a total of 3,100 Sq M of local retail compared to the 2,900 Sq M assessed in the original EIA. Table 5 in the Original Report has been recast below to account for the increased amount of local retail.

The market share at capacity has been increased to 19% (from 18%) in the original report to address the slight increase in shop GFA (of 200 Sq M) and the subsequent minor increase in appeal to the consumer.

The addition of 200 Sq M of shop GFA in Precinct H is considered to be a reasonable inclusion in the subject centre. It will likely be occupied by convenience, impulse and food service operators that typically locate proximate to a supermarket.

The increase of the local retail GFA to 3,100 Sq M is a minor increase when compared to the original EIA (2,900 Sq M). It is assessed that this change will not have a material impact on the level of need or assessed level of impact defined in the original EIA.

Table 3 - Revised Market Share Assessment, Local (Table 5 in Original EIA)

Forest Glen Floorspace Demand - Local	2019	Capacity
PTA - Total		
Turnover	$30.42	$47.53
Market Share	8%	19%
PTA Turnover	$2.43	$9.03
Inflow		
Turnover	100%	100%
Market Share	$2.43	$9.03
Total		
Projected Turnover	$4.87	$18.06
Productivity Rate	$5,000	$6,000
Floorspace Demand	973	3,010

Source: RPS

4.2 Showroom Assessment – Regional Retail

The following table provides an update of the Table 6 in the original EIA. The modifications reflect the addition of 900 Sq M of showroom floorspace. The inclusion of the 900 Sq M of showroom in Precinct H means that the Mons Road centre will have a total of 6,000 Sq M of showrooms/large format retail when compared to the 5,100 Sq M assessed in the original EIA. Table 6 in the original report has been recast below to account for the increased amount of showroom GFA.

The market share at capacity has been increased to 2.0% (from 1.7%) in the original report to address the increase in showroom GFA (of 900 Sq M) and the subsequent increase in appeal to the consumer.

The addition of 900 Sq M of showroom GFA in Precinct H is considered to be a reasonable inclusion in the subject centre. It will likely be occupied by showrooms and large format retailers (similar to those currently in the precinct) that cater to a regional catchment.

The increase of the showroom retail GFA to 6,000 Sq M is a modest increase when compared to the original EIA (5,100 Sq M). It is assessed that this change will not have a material impact on the level of need or assessed level of impact defined in the original EIA.

Table 4 - Revised Market Share Assessment, Regional (Table 6 in Original EIA)

Forest Glen Floorspace Demand - Regional	2019	Capacity
Sub Regional		
Turnover	$882.64	$1,416.02
Market Share	2.0%	2.0%
PTA Turnover	$17.65	$28.32
Inflow		
Turnover	30%	30%
Market Share	$5.30	$8.50
Total		
Projected Turnover	$22.95	$36.82
Productivity Rate	$5,000	$6,000
Floorspace Demand	4,590	6,136

Source: RPS

4.3 Impact Assessment

The addition of 200 Sq M of shop (local retail) and 900 Sq M of showroom (regional retail) will not generate any material change to the estimates of impacts contained in the original economic report. Reasons supporting this assessment include:

- An additional 200 Sq M of shop added to the Mons Road centre is a minimal increase in the overall retail footprint. While it is expected that some patronage directed to these retailers will be redirected from other retailers and centres, the overall amount of redirected expenditure is expected to be small and will be contained in the impact assessment detailed in the original EIA.

- The retail showrooms are expected to cater to a broader regional catchment and the impact will be dispersed across a large number of centres throughout the Sunshine Coast with the level of impact not being material in any single centre.

4.4 Conclusion

An additional 200 Sq M of shop GFA and 900 Sq M of showroom GFA is assessed to be a minor increase in the existing and planned scale of the Mons Road centre as addressed in the original EIA. In the case of the 200 Sq M of shop GFA in Precinct H, the overall amount of impact is expected to be small and will be contained in the impact assessment detailed in the original EIA.

The 900 Sq M of retail showrooms in Precinct H are expected to cater to a broader regional catchment and the impact will be dispersed across a large number of centres throughout the Sunshine Coast with the level of impact not being material in any single centre.

All designated centres on the Sunshine Coast (including the Buderim Centre) will continue to be viable. The capacity of these centres to fulfil the role and function intended by the planning scheme will not be impacted by the proposed additional shop and showroom floorspace.

5 INDOOR SPORT AND RECREATION

The masterplan allows for 1,000 Sq M of indoor sport and recreation in Precinct J. This is proximate to the retail, showroom and open space components of the site.

5.1 Description

The following definition of Indoor Sport and Recreation is provided in the Sunshine Coast Planning Scheme 2014.

Indoor sport and Recreation

- Definition - Premises used for leisure, sport or recreation conducted wholly or mainly indoors.
- Examples Include - Amusement parlour, bowling alley, gymnasium, squash courts, enclosed tennis courts
- Does not include - Cinema, hotel, nightclub entertainment facility, theatre

5.1.1 Implication

While the definition allows for a broad range of uses including amusement, sports and fitness, it is considered that the majority of demand for floorspace will be derived from uses in the health and fitness sectors. These uses will form the basis of the needs assessment.

5.2 Participation

The 2013-14 report on Participation in Sport and Physical Recreation, Australia (prepared by the Australian Bureau of Statistics) identified that 23.3% of the population participated in some form of health or fitness activity that may be hosted in the Indoor Sport and Recreation precinct on the subject site. This is detailed in the following table.

Table 5 - Participation in Sport and Physical Recreation - selected activities[3]

Activity	Participation (m)	Percent
Rock climbing / Abseiling / Caving	32.4	0.2
Aerobics	99.6	0.5
Aqua aerobics	90.8	0.5
Squash / Racquetball	104.5	0.6
Pilates	197.8	1.1
Dancing / Ballet	237.2	1.3
Yoga	317.5	1.7
Fitness / Gym	3,214.0	17.4
Total	4,293.8	23.3

5.2.1 Implication

The range health and fitness uses that may be hosted in the subject precinct are undertaken by a sizeable proportion of the Australian population.

[3] Participation in Sport and Physical Recreation, Australia, 2013-14

5.3 Provision

Understanding the provision rates of target health and fitness businesses is difficult to estimate as they range from national chain operations to part time businesses that utilise the facilities of an existing operation. As an indication of the scale of this market IBISWorld provides the following data[4]:

- Market Size: $3bn
- Number of Businesses: 6,426
- Industry Employment: 21,865

The report also states the industry has grown at 5.7% per annum in the period 2014 to 2019. Based on an Australian population of 25.01 million (in 2019), the rate of provision equates to 1 business per 3,892 people.

RPS undertook a web-based survey of gyms, fitness centres and related activities in the Sunshine Coast LGA and identified 182 operations. It is noted the majority of these businesses are located in major centres and industrial areas.

Table 6 - Indoor Sport and Recreation Uses - Sunshine Coast

Suburb	Number
Beerwah	6
Bli Bli	4
Buddina	5
Buderim	12
Caloundra	16
Caloundra West	12
Cotton Tree	3
Currimundi	6
Forest Glen	2
Kawana	21
Kuluin	8
Kunda Park	2
Landsborough	1
Maroochydore	36
Mons	1
Mooloolaba	8
Mooloolah Valley	1
Mountain Creek	3
Mt Coolum	1
Mudjimba	6
Nambour	18
Palmwoods	1
Sippy Downs	7
Woombye	1
Yandina	1
Grand Total	182

[4] Gyms and Fitness Centres in Australia – Market Research Report 2014-2019, IBISWorld

Based on the Sunshine Coast population of 332,200 in 2019[5], this equates to 1 business per 1,825 people. This rate of provision is higher than the national average detailed in the IBISWorld report as the concertation of the population allows for the provision of specialised services. Additionally, it is expected the definition used by IBISWorld is narrower than the range of uses that can be accommodated in the Indoor Sport and Recreation zone on the Sunshine Coast.

5.3.1 Implications

Sunshine Coast LGA is projected to have a population of 436,800 in 2031 and 518,000 in 2041. These represent an increase of 85,300 and 166,575 respectively over the population of 351,400 in 2021[6]. On the basis of the current rate of provision (1 business per 1,825 people), the population growth Sunshine Coast would reasonably justify the provision of 47 new net fitness/health businesses in the period 2021 to 2031 and 91 in the period 2021 to 2041. These estimates do not consider any increase (or decrease) in supply based on new and evolving trends.

5.4 Conclusion

It is assessed that any indoor sport and recreation businesses located on the subject site will not cater exclusively to a small local catchment. However, these operations may (depending on the business) draw a reasonable proportion of trade from local residents.

It is considered valid to assess the future level of need and demand for indoor sport and recreation uses based on a larger catchment that consists of the Sunshine Coast LGA as the future business are likely to provide a specialised offering that caters to an extended catchment (similar to many of the other uses currently located in Forest Glen).

Growth in need for Indoor Sport and Recreation floorspace can be conservatively linked to the expected population growth in the Sunshine Coast LGA, on this basis 47 new net fitness/health businesses will be required in the period 2021 to 2031 (or 4.7 new businesses per annum). It is assessed that the subject site (with 1,000 Sq M GFA) will likely host two or three businesses which equates to between 5 and 8 months of increased demand for Indoor Sport and Recreation based on the projected population growth in the Sunshine Coast LGA.

The subject site is well located to service the smaller towns and rural areas of the Sunshine Coast as many of the current Indoor Sport and Recreation businesses are located in major centres and industrial areas.

The provision of a dedicated Indoor Sports and Recreation precinct will assist in preserving the capacity of the industrial precincts to host employment generating and enterprise uses.

[5] Derived from the 2018 Medium series population projections produced by the Queensland Government Statisticians Office (QGSO)

[6] IBID

6 NEEDS ASSESSMENT

The need for the proposed elements assessed in this report closely aligns with the needs argument presented in the original EIA.

The inclusion of an additional 200 Sq M of shop, 900 Sq MN of showroom and 1,000 Sq M of indoor sport and recreation is a natural match for the existing and proposed uses in the Mons Road precinct that includes (or is proposed to include) a school, industrial land uses, medical facilities, convenience retail, showrooms and destination retail.

The assessed uses build upon the role and function of the established and proposed retailers and businesses in the precinct

6.1 Need

The need for the proposed uses is summarised as follows:

- The addition of 200 Sq M of shop is s minor increase in the overall amount of convenience retail. The benefits and need of which were defined in the original EIA and include the greater provision of local retail for local residents.

- The provision of 900 Sq M of showroom fulfils the current function of the overall precinct and is justified on the basis of location and regional population growth.

- The inclusion of Indoor Sport and Recreation in the subject precinct is justified by the demands of a growing regional population and the current characteristics of the Mons Road Precinct. Growth in need for Indoor Sport and Recreation floorspace can be conservatively linked to the expected population growth in the Sunshine Coast LGA; on this basis, 47 new net fitness/health businesses will be required on the Sunshine Coast in the period 2021 to 2031 (or 4.7 new businesses per annum).

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Our Ref: 19044/100220.JN

10 February 2020

Ms Katrina Patey
Principal Development Planner
Planning Assessment, Development Services
Customer Engagement & Planning Services
Sunshine Coast Council
Locked Bag 72
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Email: katrina.patey@sunshinecoast.qld.gov.au

Dear Katrina,

RE: SECOND PEER REVIEW – MCU19/0141 – FOREST GLEN LOCAL CENTRE

Following various correspondences, I am pleased to present this second stage of a Peer Review of the abovementioned application. Following the delivery of our first stage Peer Review on 22 August 2019, the Applicant has submitted a Response to the Information Request, which included an Economic Response to the Information Request and incorporated several changes to the proposed development.

This second stage Peer Review focusses upon the Economic Impact Assessment and the Economic Response to the Information Request.

Background

Council has received a Preliminary Approval Application including a Variation Request, a Development Permit Application for a Material Change of Use and a Development Permit Application for Operational Work in respect of a proposed expansion to an existing Local Centre on a 6.0ha site at 354 and 370 Mons Road, Forest Glen. The real property descriptions are Lot 7 SP246654, Lot 8 RP810748 and Lot 14 SP295875.

It is recognised that existing uses occupy part of the site, including 1,400m^2 of Shops in Precinct B.

The Applicant has made some changes to the plans in response to the Information Request. However, these changes appear to have been made in haste, with discrepancies between the amended Table of Assessment and maximum floorspaces proposed to be imposed by the table on the amended Master Plan Landuse. For example, the Master Plan Landuse limits Shops in Precinct H to 200m^2, yet the Table of Assessment lists Shops as being Impact Assessable in Precinct H; and the Master Plan Landuse limits Indoor Sport & Recreation to 1,000^2, yet the Table of Assessment lists no such limit. It is assumed that these anomalies will be corrected by the Applicant in due course.

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The Variation Request seeks to allow for a wide range of commercial, industry and community uses. It is proposed to provide for up to 18,090m^2 GFA. Of relevance to the centres network, the following new uses are proposed to be Code Assessable:

(a) Shopping Centre up to 2,500m^2 in Precinct A;
(b) Shop if in Precincts A and B and where the maximum size of a supermarket is 1,500m^2 and the maximum size otherwise is 300m^2;
(c) Showroom, Shop and Market to a combined maximum of 900m^2 if in Precinct H and where Shop is a maximum of 200m^2;
(d) Food and Drink Outlet if in Precincts A and B and does not incorporate a drive-through facility and is not a high volume restaurant;
(e) Health Care Services to 2,400m^2 if in Precinct E;
(f) Childcare Centre, but not specified as being in any Precinct, nor any floorspace limit imposed; and
(g) Indoor Sport & Recreation to 1,000m^2 if in Precinct J.

The Development Permit Application seeks approval of three buildings, numbered in this Peer Review from west to east. Building 1: a Shopping Centre comprising a 1,500m^2 supermarket and 402m^2 of Shops; Building 2: Medical Retail Centre of 1,000m^2 (of which 600m^2 has been identified as comprising Shops); and Building 3: Health Care Services (medical centre) of 1,000m^2. IGA is the intended operator of the supermarket. It is noted that the proposed 2,502m^2 of Shops proposed by the Development Permit Application exceeds the Code Assessable limit sought to be established by the Preliminary Approval in Precinct A by 2m^2. It is assumed that this difference would be resolved by the Applicant.

The subject site is mostly included within the Emerging Community zone, although a small strip of existing Shops is located within the Local Centre zone. Forest Glen is not identified as a Local (Full Service) Activity Centre by the Strategic Framework of the Sunshine Coast Planning Scheme 2014, although the presence of the Local Centre zone at this location indicates that it is a Local (Not Full Service) Activity Centre. The Forest Glen/Kunda Park/Tanawha Local Plan Code provides for the expansion of the Forest Glen Local Centre onto the subject site provided that it complements existing uses and maintains the role and function of this Centre as a Local (Not Full Service) Centre. The Applications are Impact Assessable.

The Applications were supported by an Economic Impact Assessment (EIA) prepared by RPS and dated June 2019. This EIA only addressed the Development Permit Application, not the Preliminary Approval Application. An Information Request included a request to amend the Economic Impact Assessment to include the elements proposed in Precincts G, H and J. An Economic Response to the Information Request was subsequently received.

This Peer Review therefore focuses upon the Economic Impact Assessment and Economic Response to the Information Request reports.

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Economic Impact Assessment

The Economic Impact Assessment has generally utilised an appropriate methodology. It has considered relevant planning policies, considered the centres hierarchy, defined a catchment area, assessed the population and demographics of the population, undertaken an analysis of the retail expenditure base, applied a market share analysis and assessed the need for the proposed development.

As previously stated, the key weakness of the Economic Impact Assessment is that it has only assessed the Development Permit Application.

It is also considered that the impact section of the Economic Impact Assessment is rather short. However, for reasons set out below, this is not considered to be a significant weakness.

The EIA has generally adopted reasonable assumptions. The definition of the Primary Trade Area appears sound, as are the population and demographics of the Primary Trade Area. The analysis of competitive centres also appears sound.

The exceptions to this view about reasonable assumptions include:

(a) The definition of a Sub Regional Trade Area, which includes Nambour, Buderim, Palmwoods and other communities. It appears that the purpose of this large Trade Area was to help explain the market presently being served by the Forest Glen Kunara Organic Marketplace, Chemist Warehouse and Pet Warehouse, which is understandable. It is also used to support the medical centre. However, it is my view that this much larger Sub Regional Trade Area should not be relied upon to support the proposed development at the Forest Glen Local (Not Full Service) Activity Centre;

(b) The EIA postulates a series of market shares for different centres in a hierarchy. The percentage range allocated to bulky goods appears high and the percentage range allocated to local centres appears low;

(c) The EIA is a little weak on arithmetic. The Report calculates (Table 5) that local demand from the Primary Trade Area at capacity for retail floorspace is 2,852m^2. With existing local retail floorspace supported at 973m^2 (Table 5) and estimated at 1,000m^2 (Table 1), the Report supports additional local retail floorspace of 1,852m^2 to 1,879m^2. The Development Permit Application seeks approval for retail floorspace of 2,500m^2. The implication is that the proposed additional retail floorspace exceeds that supported by the EIA by about 650m^2;

(d) The Medical Centre was supported on the basis of the Sub Regional Trade Area rather than the Primary Trade Area. Based upon the assumptions of the Report, the Primary Trade Area could support seven General Practioners at capacity. Given that there would be some leakage of medical visits to larger centres outside the Primary Trade Area and some passing trade, it is considered that there is a local need for a modestly scaled medical centre, such as about 500-700m^2 (including allied health practioners), which falls well short of the scale of the Health Care Services in Stage 1 (1,400m^2) and overall (2,400m^2); and

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(e) The EIA states that the Jones Road Woolworths-based shopping centre application is currently under Appeal. The Queensland Planning & Environment Court approved that application in October 2017. Either the EIA is out of date or the it is indicating that that decision was appealed and that a Court of Appeal judgement is yet to be issued.

The EIA is essentially arguing that only 1,000m^2 of the Forest Glen Local Centre is currently acting as a Local (Not Full Service) Activity Centre, with the other facilities playing an eclectic role to a larger catchment. Population growth of the Primary Trade Area, together with demand from workers and passing motorists, would support the provision of 2,850m^2 of retail floorspace at the Forest Glen Local Centre plus a medical centre. The proposed 1,902m^2 Building 1 is therefore supported by the local Primary Trade Area, with these facilities also being consistent with the facilities expected to be located within a Local (Not Full Service) Activity Centre. Due to population growth and a multiple of centres likely to be affected, the Report argues that impacts from the proposed development will be dispersed across a large number of centres, with the level of impact not being material in any single centre.

These arguments are supported. The conclusions of the EIA in respect of Building 1 of the Development Permit Application are supported and can be relied upon. However, the EIA clearly relies upon the larger Sub Regional population to support Building 2 and the scale of Building 3. It has not justified these facilities on the basis of servicing the needs of the Primary Trade Area. They would need to service a much larger catchment area and would be expected to operate on a basis more similar to that of the existing Kunara Organic Marketplace.

I consider that Building 1 and a smaller component of Building 3 (say 500-700m^2) of the Development Permit Application, comprise uses consistent with a Local (Not Full Service) Activity Centre and are supported by local demand. However, the existing Kunara Organic Marketplace, Building 2, and the larger scale of proposed Building 3 are consistent with a Local (Full Service) Activity Centre or higher order centre and exceed the demand from the Primary Trade Area.

The existing Planning Scheme 2014 restricts the Forest Glen Local Centre to a (Not Full Service) Activity Centre. However, I have provided advice to Council in mid-2018 to the effect that Forest Glen should be elevated to a Local (Full Service) Activity Centre. This was more in recognition of what had been approved and developed to date and the expectation of future development pressures rather than a need to service a discrete local population. Given this advice, the consequences of development at Forest Glen encroaching on the Local (Full Service) Activity Centre role appears to not be as significant as the Planning Scheme 2014 states.

I therefore confirm that there is a moderate to strong level of community, economic and planning need for proposed Building 1 and a smaller scale of Building 3 (say 500-700m^2) of the Development Permit Application. The level of need for the larger scale of Building 3 and for Building 2 is likely to be at the minor to modest level.

If Council is supportive of the Forest Glen Local Centre being elevated to Full Service, then the EIA has supported Building 2 and the larger scale of Building 3 on the basis of it serving a larger population.

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It is not considered appropriate to apply any specific conditions or limitations to Building 1. It may be appropriate to impose reasonable and relevant conditions (limitations) on Building 2 and Building 3 if Council wishes to maintain Forest Glen as a Local (Not Full Service) Activity Centre.

Economic Response to the Information Request

The Economic Response dismissed the need to assess the Childcare Centre element on the basis that Precinct G had been deleted from the Plan. However, the amended Table of Assessment clearly provides that a Childcare Centre is Code Assessable anywhere on the site, with no floorspace limitations. It therefore should be assessed. The Economic Response also seems to have ignored the Market element of Precinct H, assuming that all 900m^2 would be tenanted by Showrooms (page 7).

The Economic Response concludes that the additional Shop floorspace (200m^2) represents only a minor increase and should be supported, that the proposed Showrooms (900m^2) and Indoor Sport & Recreation (1,000m^2) elements should be supported on the basis that the Forest Glen Local Centre already serves a large catchment and that all centres on the Sunshine Coast would continue to be viable after their development.

Given the range and scale of existing activities being undertaken at the Forest Glen Local Centre, these conclusions are considered reasonable with one proviso. A 1,000m^2 Indoor Sport & Recreation (gym) would be considered a large scale operation, larger than typically found in Local (Not Full Service) Activity Centres. However, its proposed scale is in line with the existing Chemist Warehouse and Kunara Organic Marketplace established within this Centre.

A Childcare Centre is the type of use that would be typically located within a Local Centre. It is therefore likely that it could be supported on the site at some scale, but this has not been assessed by the Applicant.

As stated above, the Market element has not been assessed by the Applicant. Due to this element not typically forming part of a Local Centre and due to the importance of the Eumundi Markets to the Sunshine Coast tourism profile and economy, it should not be omitted from the analysis. The Applicant has not provided any information upon which we can take comfort that the Market element of the proposed development would not undermine the role of the Eumundi Markets. This issue potentially becomes of more significance due to an understanding that there are two other tourist applications in this corridor to incorporate Markets as part of tourism developments.

Conclusion

The Forest Glen Local (Not Full Service) Activity Centre is an unusual centre. Whilst not containing a full-line supermarket, it provides a large quantum of retail and commercial floorspace (6,500m^2), with several elements not considered to be small scale or serving only a local catchment: Kunara Organic Marketplace; Chemist Warehouse; micro-brewery.

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The proposed development is likely to increase the retail and commercial floorspace of this Centre to in the order of 12,500m², which is more akin to the size of a small District Centre.

Ameliorating issues include the fact that a full-line supermarket is not proposed, I have previously recommended to Council that this Centre be upgraded to a Local (Full Service) Activity Centre and there are few other centres of similar scale in this corridor likely to be significantly adversely impacted by the proposed development.

From an economic perspective, Building 1, a smaller scale Building 3, Showrooms and a smaller scale Indoor Sport & Recreation are supported.

If Council is supportive of the Forest Glen Local Centre being elevated to Full Service, then Building 2, the larger scale of Building 3 and the larger scale of Indoor Sport & Recreation are also supported.

The Preliminary Approval allows Health Care Facilities to a maximum of 2,400m², with Buildings 2 and 3 only accommodating 1,400m². The Applicant has not demonstrated any demand or need for the balance of 1,000m² of Health Care Services, with the scale of a 2,400m² facility not being commensurate with that of a Local Centre, whether Full Service or not.

The issues of Childcare Centre and Markets have yet to be assessed by the Applicant. Again, the issue at stake for these uses is really one of scale rather than their suitability in a Local Centre.

There is also an urban design issue at play. There is poor integration presently at Forest Glen and I am concerned that the proposed retail elements would exacerbate this position. Whilst not strictly an economic issue, there is a public and community benefit if the expanded Forest Glen Local Centre were to be developed in a way that improves integration. This is a matter for others.

I trust that this advice is sufficient for your present purposes. Should you have any queries, please do not hesitate to contact me.

Yours faithfully
Norling Consulting Pty Ltd

Jon Norling
Director

Related Report / Additional Information Request

Meeting:	**Ordinary Meeting**	**Date:**	**12 November 2020**
Requesting Councillor:	**Councillor J O'Pray**		
Item:	**Item 8.5**		
Confidential	**Nil**		
Circulation	**10 November 2020**		
Officer (title):	**Manager Customer Response (Acting)**	**Approving GE (title):**	**Customer Engagement & Planning Services**

In response to a question raised by Councillor O'Pray, please note the following additional information for your consideration.

Question:

Provide details of the equipment hire business in front of the lifeguard tower at Mooloolaba main beach.

Response:

There is currently one Commercial Use – Low Use permit issued for Beach Equipment Hire at Mooloolaba. The permit holder has approval to operate from the Club Lane Car Park and has no approval to place equipment for display or storage on the beach or foreshore. The business is permitted operate 3 days per week for a maximum of 6 hours per day. The permit was issued on 21 July 2020 and subsequently was placed on hold at the request of the operator until the December 2020 school holidays due to COVID-19.

A Commercial Use – Low Use permit has been issued in the past for Beach Equipment Hire at Mooloolaba. This permit holder had approval to operate from the beach at Beach Access 180 with a back-up location between Beach Access 177 and 178. The permit was active from May 2018 to July 2019. The permit holder cancelled their permit.

Both approvals included allowances for beach equipment hire only and did not permit the sale of other items such as drinks or food.

Related Report / Additional Information Request

Meeting:	**Ordinary Meeting**	**Date:**	**12 November 2020**
Requesting Councillor:	**Mayor**		
Item:	**Item 8.8 Financial Statements**		
Confidential	***Nil***		
Circulation	***9 November 2020***		
Officer (title):	**Janine Wex, Coordinator Financial Accounting**	**Approving GE (title):**	***Acting Group Executive Business Performance***

In response to a question raised by Mayor Jamieson, please note the following additional information for your consideration.

Question:

Provide a comparison at a federal and state level of operating result costs per person

Response:

The 2019/20 operating results for both the State and Federal governments, are not yet available (usually published early December). To provide some context, please see below results for the prior year as well.

	Sunshine Coast Council	State Government	Federal Government
	2019/20	**2019/20**	**2019/20**
	2019/20 Operating Result *$ million*	**2019/20 Operating Result** *$ million*	**2019/20 Operating Result** *$ million*
	(1.5) *Deficit*	*not yet available*	*not yet available*
Population (2019)	328,428	5,094,510	25,365,571
Benefit/(Cost) per person	$ (4) *Cost*	*not yet available*	*not yet available*
	2018/19	**2018/19**	**2018/19**
	2018/29 Operating Result *$ million*	**Operating Result** *$ million*	**Operating Result** *$ million*
	13 *Surplus*	(1,090) *ie $1.1 billion deficit*	(39,281) *i.e. $39.3 billion deficit*
Population (2018)	319,922	5,011,216	24,982,688
Benefit/(Cost) per person	$ 41 *Benefit*	$ (218) *Cost*	$ (1,572) *Cost*

Data Sources

Sunshine Coast Council 2019/20 Operating Result

Sunshine Coast Council November 2020 Ordinary Meeting Agenda

https://d1j8a4bqwzee3.cloudfront.net/~/media/Corporate/Documents/Meetings/November%202020/8_8%20201920%20Financial%20Statements%20and%20Community%20Financial%20Att%201%20Independent%20Auditors%20Report%20121120%20OM.pdf

https://d1j8a4bqwzee3.cloudfront.net/~/media/Corporate/Documents/Meetings/November%202020/8_8%20201920%20Financial%20Statements%20and%20Community%20Financial%20Att%203%20Community%20Financial%20Report%20121120%20OM.pdf

Sunshine Coast Council 2018/19 Operating Result

Sunshine Coast Council 2018/19 Annual Report (page 79)

https://d1j8a4bqwzee3.cloudfront.net/~/media/Corporate/Documents/Council/Annual%20Reports/annual_report_1819.pdf?la=en

Population Data

Australian Bureau of Statistics

http://stat.data.abs.gov.au/Index.aspx?DataSetCode=ABS_ERP_LGA2019

State Government 2018/19 Operating Result

Queensland Audit Office Report to Parliament – Queensland Government State Finances: 2018/19 results of financial audits

https://www.qao.qld.gov.au/reports-resources/reports-parliament/queensland-government-state-finances-2018-19-results-financial

Federal Government 2018/19 Operating Result

2018-2019 Commonwealth Consolidated Financial Statements (page 35)

https://www.finance.gov.au/sites/default/files/2019-12/consolidated-financial-statements-201819-reports_0.docx

Related Report / Additional Information Request

Meeting:	**Ordinary Meeting**	**Date:**	**12 November 2020**
Requesting Councillor:	**Councillor D Law and Councillor Cox**		
Item:	**Item 8.9 Acquisition of Land Caloundra**		
Confidential	**nil**		
Circulation	**10 November 2020**		
Officer (title):	**Project Development Officer**	**Approving GE (title):**	***Director – Major Projects and Strategic Property***

In response to a question raised by Councillor D Law, and Councillor P Cox please note the following additional information for your consideration.

Question:

- Councillor Cox - Please give an overview of previous maintenance costs and how this expenditure has been funded.

- Councillor Law - The estimated maintenance costs over the next 10 years are $160,500; Is the funding available already within existing budgets or do we need to find it?

Response:

- Previous maintenance has been funded through Council's operational and capital works budgets as well as from grant funding. Council's operating and capital expenditure over the previous 3 year financial years and the current year to date is shown in the table below:

OLD CALOUNDRA LIGHTHOUSES

	2017/18	2018/19	2019/20	2020/21
Operating Expenditure	$9,873	$363	$363	
Capital Expenditure		$14,813.59		
Total	$9,873	$15,177	$363	$0

- The Property Management Branch operational maintenance budget for the asset is $7,000 per annum. In the past, capital expenditure funding has been made available through the Capital Works Program from existing budgets.

- In addition to this direct Council expenditure, the Friends of the Caloundra Lighthouses community group have sourced grant funding through Council to conduct various works on the lighthouses including maintenance. A summary of these grants over the past 10 years is as follows:

Community Partnership Funding Program 2018/19 - 2020/21	**Approved** **$13,650.00**
Recording the old light keeper's cottage *Minor Grants 2015/16 – 2016/17*	**Approved** **$1,980.00**
Conservation Management Plan for the Caloundra Lighthouses Precinct ***Major Grant 2015/16 - 2016/17***	**Approved** **$7,500.00**
Caloundra Lighthouses ***Community Partnership Funding Program 2014/15 - 2017/18***	**Approved** **$9,570.00**
"The Little Lighthouse" children's' book *Major Grant 2013/14 - 2014/15*	**Approved** **$7,500.00**
Z Community Partnership Funding Program 2011-2013	**Approved** **$13,650**
Heritage and History March 2011 - Major Grant 2010/11 - 2012/13	**Approved** **$7,500**
Total Grant Funding from Council (10 Years)	**$61,350**

- Funding will be required to undertake identified planned maintenance works over the next 10 years. Council's Property Management Branch – Building and Facilities Asset Management Unit have estimated $160,500 will be required for these identified works. An additional $23,500 has been estimated for external expertise to conduct inspections and prepare reports on these maintenance items.

- Funding for condition assessment and engineering reports will be through the Built Heritage Conservation Fund (Heritage Levy 2020/21). The Property Management Branch operational maintenance budget for the asset (generally $7,000 per annum) will be used to undertake subsequent works. If additional funding is required, that can't be made available through existing capital works budgets, then it will be applied for through the Capital Works program development by Building and Facilities Asset Management Unit.

Related Report / Additional Information Request

Meeting:	**Ordinary Meeting**	**Date:**	**12 November 2020**
Requesting Councillor:	**Councillor M Suarez**		
Item:	**Appointment of Independent Audit Committee Members**		
Confidential	**Nil**		
Circulation	**10 November 2020**		
Officer (title):	**Chief Strategy Officer**		

In response to a question raised by Councillor M Suarez, please note the following additional information for your consideration.

Question:

Provide details of how many applicants and selection panel

Response:

In accordance with the endorsed transition strategy, Independent Audit Committee Member positions were publicly advertised 17 August 2020 for a two week period. A total of 35 applications were received with four applicants shortlisted for interview.

The interview selection panel consisted of Mr Greg Laverty, Group Executive Economic and Community Development; Mr Michael Costello, Acting Group Executive Business Performance, and Ms Kim Driver, Manager Corporate Governance.