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## **Economic Need & Impact Assessment**

INDOOR SPORT & RECREATION  
57 HAYWARD STREET,  
STAFFORD

Job No. 26022

May 2026

**Ue** urban  
economics

**Prepared on behalf of:**

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**Warranty**

This report has been based upon the most up to date readily available information at this point in time, as documented in this report. Urban Economics has applied due professional care and diligence in accordance with generally accepted standards of professional practice in undertaking the analysis contained in this report from these information sources. Urban Economics shall not be liable for damages arising from any errors or omissions which may be contained within these information sources.

As this report involves future market projections which can be affected by a number of unforeseen variables, they represent our best possible estimates at this point in time and no warranty is given that this particular set of projections will in fact eventuate

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## Contents

<b>Executive Summary</b> .....	<b>iii</b>
<b>1.0 Introduction</b> .....	<b>1</b>
1.1 Background .....	1
1.2 Study Objectives and Approach .....	2
<b>2.0 The Subject Site &amp; Proposed Development</b> .....	<b>3</b>
2.1 Subject Site .....	3
2.2 The Proposed Development .....	4
2.3 The Planning Framework.....	6
2.4 The Stafford Industrial Area .....	9
2.5 Implications.....	9
<b>3.0 Study Area Analysis</b> .....	<b>10</b>
3.1 Study Area Definition.....	10
3.2 Population and Household Growth .....	11
3.3 Demographic and Socio-Economic Profiles .....	12
3.4 Working Population.....	15
3.5 Implications for the Subject Site.....	16
<b>4.0 Indoor Sport and Recreation</b> .....	<b>17</b>
4.1 Fitness, Health and Wellness Facilities .....	17
4.2 Proposed and Approved Development .....	19
4.3 Implications.....	20
<b>5.0 Demand Analysis</b> .....	<b>21</b>
5.1 Trends .....	21
5.2 Demand for Indoor Sport and Recreation .....	23
5.3 Demand for Industry/Warehouse.....	24
<b>6.0 Assessment of Need</b> .....	<b>25</b>
<b>Economic Need</b> .....	<b>25</b>
<b>Community Need</b> .....	<b>25</b>
<b>Planning Need</b> .....	<b>26</b>
<b>Impacts and Benefits</b> .....	<b>27</b>
<b>7.0 Conclusions</b> .....	<b>28</b>

## Executive Summary

Urban Economics has been commissioned by Lifestyle Fitness to prepare an Economic Need and Impact Assessment for a proposed Indoor Sport and Recreation Facility at 57 Hayward Street, Stafford. The proposed development seeks to adaptively reuse an existing vacant showroom tenancy within the Stafford industrial precinct for a large-format fitness, health and wellness facility comprising gymnasium, strength and functional training areas, wellness and recovery facilities, studios and associated member amenities.

The Report has been prepared in response to an Information Request issued by Brisbane City Council seeking further justification of the need for the proposed use within the General Industry A Precinct of the Industry Zone under Brisbane City Plan 2014. In particular, Council requested further assessment regarding the economic, community and planning need for the proposal, its compatibility with industrial activities and whether the use could reasonably be accommodated elsewhere within a more appropriate zone.

The assessment demonstrates that the proposed development would respond to a clear and growing demand for indoor sport, recreation, fitness and wellness facilities within the Stafford catchment, while not compromising the ongoing or future industrial use potential of the site.

The Stafford catchment currently supports an estimated resident population of approximately 94,800 persons and has experienced strong population growth over the past decade, significantly exceeding earlier projections. The catchment is forecast to exceed 102,000 residents by 2046, with continued growth expected to occur through urban consolidation, medium density redevelopment and broader suburban renewal.

Demographic analysis identifies the catchment as having a comparatively younger and highly active working-age population with above-average workforce participation rates and household incomes. The area supports elevated proportions of professionals, renters and medium-density dwellings, characteristics which are strongly aligned with demand for flexible fitness, wellness and recreation facilities. The catchment also includes a substantial non-resident workforce associated with Stafford's broader employment precinct and nearby strategic employment generators including Enoggera Barracks.

The assessment of existing supply indicates that Stafford already functions as a recognised hub for indoor sport, fitness and wellness activities. However, the majority of existing facilities comprise small to medium-scale gyms, boutique studios and specialist operators. There are currently only two established large-format gymnasiums within the catchment and no comparable facilities which integrate premium gymnasium, wellness, recovery and studio-based offerings within a single destination.

Analysis of participation trends and expenditure patterns further supports the proposal. national and Queensland data demonstrates continued long-term growth in gym and wellness participation,

particularly amongst younger working-age cohorts and higher income households. Local expenditure data also indicates that catchment residents spend above-average amounts on gymnasium and fitness-related activities.

Based on estimated participation rates and projected population growth, the assessment concludes that the catchment is currently undersupplied in large-format indoor sport and recreation floorspace, with an identified gap equivalent to approximately two to three additional large-format facilities over time. Demand generated from the broader worker population further reinforces this need.

Importantly, the assessment also concludes that Stafford is no longer functioning as a traditional industrial precinct in the manner contemplated when the planning framework was originally established. Analysis undertaken by Urban Economics identifies that only approximately 26% of floorspace within Stafford's industrial zones is currently utilised for industrial purposes, with the majority of activity now comprising retail, showroom, office and other commercial uses. Significant vacancy also exists throughout the precinct, including the subject premises which represents one of the largest vacant contiguous spaces within the locality.

The report identifies that contemporary industrial demand within Brisbane is increasingly concentrated within major industrial precincts benefiting from strategic freight and transport infrastructure connections. Stafford does not possess these locational advantages and has increasingly transitioned toward a more diverse employment and service-based function over time.

The proposed development would:

- Adaptively reuse an existing vacant premises without requiring substantial structural modification;
- Provide a unique and complementary indoor sport and wellness offering not currently available within the catchment;
- Support the needs of the surrounding resident and worker populations;
- Contribute to employment generation and economic activation;
- Reduce vacancy within the Stafford industrial precinct;
- Align with broader trends toward the diversification and renewal of legacy industrial areas; and
- Maintain the future flexibility of the site for industrial use should market conditions change.

The assessment therefore concludes that there is a strong economic, community and planning need for the proposed Indoor Sport and Recreation Facility at 57 Hayward Street, Stafford and that the proposal would deliver a positive net outcome for the locality without undermining the role or function of the broader industrial precinct.

# 1.0 Introduction

## 1.1 Background

Urban Economics has been commissioned by Lifestyle Fitness to present an Economic Need and Impact Assessment report for the proposed development of an Indoor Sport and Recreation Facility at 57 Hayward Street, Stafford.

This report has been prepared subsequent to an Information Request from Brisbane City Council, noting that the proposed use is not contemplated within the City Plan 2014 General Industry A zoning provisions and is therefore impact assessable. More specifically, the Information Request from Council provides:

### ***“Needs Analysis***

*1) The submitted Needs Analysis has been reviewed and is not considered to sufficiently demonstrate need. Provide a Needs Assessment, prepared by a suitably qualified economic needs expert, demonstrating that the development provides for uses and activities that support industry activities and does not compromise the future use of premises for industry activities. This should include qualitative findings, supported by a detailed quantitative analysis from referenced sources. Given current pressures in relation to the supply-demand balance for industrial land with a current need to protect the viability of industrial land, include demonstration that the use cannot be accommodated in an appropriate zone.”*

The assessment considers the market which the proposed development would operate in, having regard to existing and planned gyms and wellness centres within the surrounding area.

Further, the Report examines the broader economic, community and planning need for additional fitness and recreation facilities within the local catchment, as well as potential impacts on surrounding land uses and the existing planning framework, having particular regard to the compatibility of the proposed use within an industrial zone.

## 1.2 Study Objectives and Approach

The overall objective of this Report is to demonstrate the need for the proposed indoor sport & recreational facility in Stafford, measured against the proposed development's implications for the site's ongoing and future use for industrial purposes. In undertaking this analysis, Urban Economics has assumed the following tasks:

- Reviewed the proposed development plans and proposed operational characteristics of the use;
- Reviewed the planning and economic development framework including the strategic framework and Brisbane CityPlan 2014 and industrial strategy (Our Living City) for Brisbane;
- Inspected the site and the surrounding network of indoor sport and recreation uses and industrial activity;
- Defined a study area for investigation;
- Estimated population and household growth and projected growth within the study area;
- Critiqued the demographic and socio-economic profile and evolving changes to the local study area community;
- Assessed the demand for the proposed gym, health and wellness activities within the study area;
- Contemplated the supply/demand gap for Indoor Sport and Recreation activities within the study area;
- Assessed the economic, community and planning need for the proposed development and the proposed mix of uses on the subject site;
- Assessed the economic impact of the proposed development and the implications for industrial activity and land within Stafford; and
- Examined the anticipated economic and community beliefs of the proposed development for the Stafford and Brisbane economies.



## 2.2 The Proposed Development

FIGURE 2.2 illustrates concept floorplans for the proposed development which support a mix of fitness and wellness activities including:

- Weights
- Strength training
- Specialised Group Training Area
- Functional fitness
- Cardio area
- Reformer Pilates Studio
- Yoga studio
- Recovery centre and spa
- Members lounge and amenities

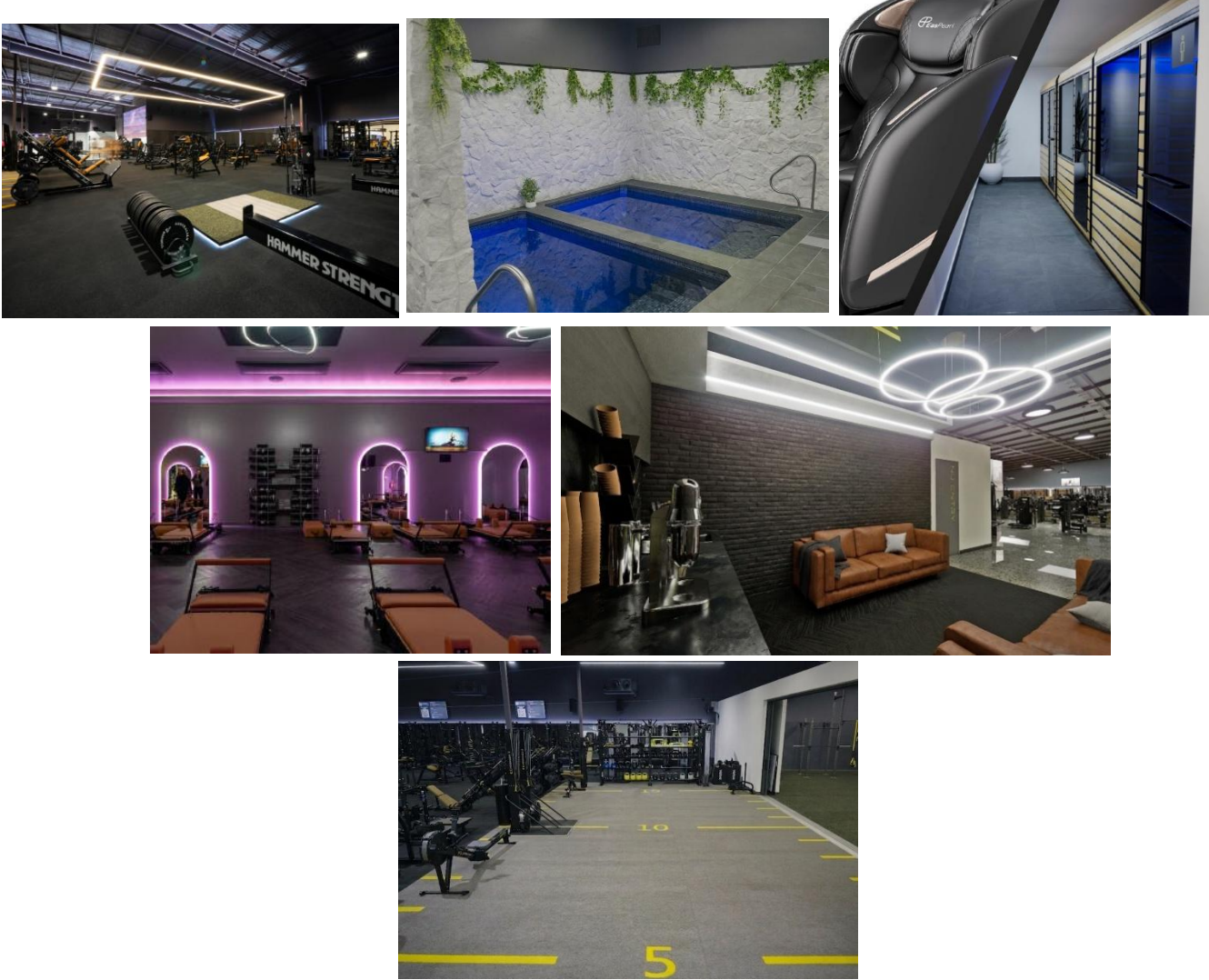
**FIGURE 2.2: Concept Floorplan**



Operationally, Lifestyle Fitness provides a unique and premium fitness health and wellness offering with 24/7 access for members and peak operating times typically between 5am to 6am in the mornings and between 5pm and 6pm in the evenings on weekdays, aligning with the needs of workers. Whilst including features of typical gymnasias, the integration of wellness elements and premium member amenities dictates the need for a large format layout. The recovery centre and spa for instance includes:

- Hot and cold magnesium plunge pools for contrast therapy
- Infrared sauna
- Steam sauna
- Massage chairs and devices
- Hydro massage beds
- Stretch zones and compression therapy devices

Imagery provided below illustrates some of the extensive facilities and amenities of the proposed indoor sport & recreation use.



## 2.3 The Planning Framework

This Section is not intended to be a comprehensive planning assessment, but rather a summary of the planning and policy framework which is of relevance to the subject site and proposed development and the context from which economic, community and planning need can be assessed.

The subject site is located within the Industry Zone, General Industry A Precinct of City Plan 2014, as illustrated in FIGURE 2.3.

**FIGURE 2.3: City Plan 2014 Zones**



We have also had regard to the Industry Zone Code within the City Plan 2014 in exploring economic, community and planning need for the proposed development at the subject site, noting:

- “1. The purpose of the industry zone is to provide for:
  - a. a variety of industry activities; and
  - b. other uses and activities that:
    - i. support industry activities; and
    - ii. do not compromise the future use of premises for industry activities.”

Specific outcomes within the Industry Zone Code also relevantly delineate the intention for indoor sport and recreation as follows:

*“PO26*

*Development for indoor sport and recreation is only located in the Low impact industry zone and is low key in scale, nature and employment, and of an appropriate size to serve the needs of the local industrial workforce and does not detrimentally impact on the primary industrial function of the area.*

*AO26*

*Development for indoor sport and recreation is only located in the Low impact industry zone and does not exceed a gross floor area of 400m<sup>2</sup>.”*

The Strategic Framework of Brisbane City Council’s Planning Scheme defines five themes around which the vision and policy for the City is framed:

- globally competitive economy;
- outstanding lifestyle;
- clean and green leading environmental performance;
- highly effective transport and infrastructure underpinning these outcomes;
- CityShape as the physical expression of the other four themes and their interrelationships.

Moreover, in exploring a globally competitive economy and more particularly the “shape of the City”, the Strategic Framework identifies Major Industry Areas, centres, strategic inner city industry areas (SICIA) and growth nodes in fostering economic activity and development. Relevantly, the subject site is not located within the Major Industry Area or a SICIA under the Strategic Framework.

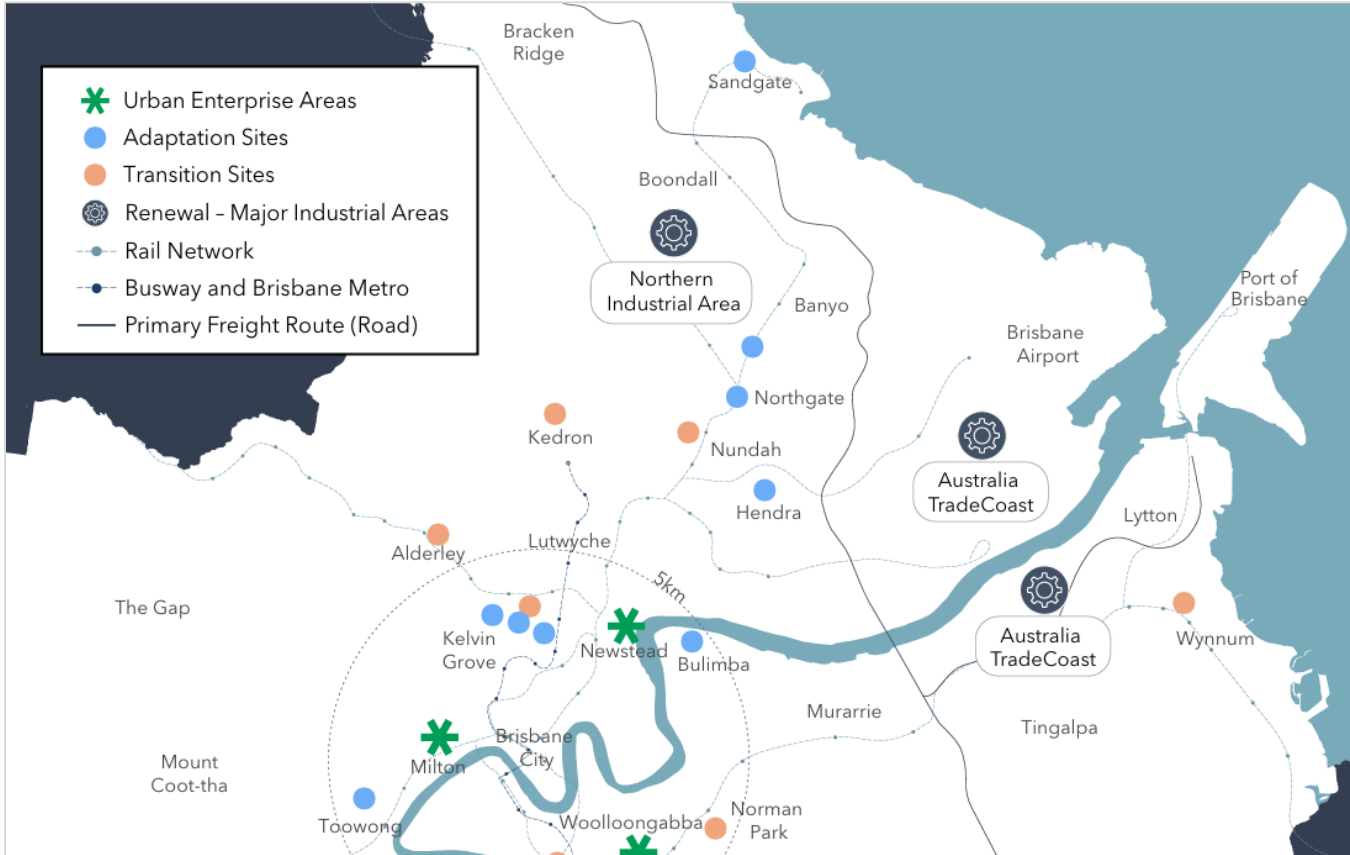
Brisbane’s industrial strategy “Our Productive City” identifies an array of principals which support the proposed development’s change of use, particularly as this relates to the evolution and renewal of the City’s industrial areas including:

- Industrial land use will evolve to meet the changing requirements of Brisbane.
- Industrial land will accommodate more jobs and add higher economic value.
- Land supply will evolve to meet future demand for higher value industry uses.
- Selected industrial areas will be a basis for suburban and urban renewal, increasing Brisbane’s housing supply and business opportunities.

- Amenity and lifestyle of areas will attract the best and brightest minds.
- Industrial precincts, with appealing services and amenities for workers and businesses, will be better integrated into the city.
- Industrial businesses will attract and retain a diversity of workers with improved public and active transport and better lifestyle options.
- An agile and flexible policy environment will reduce barriers to entry and ensure that a wide range of businesses can establish and expand in Brisbane, including start-ups and scale-ups.

Despite this intent, the Stafford industry area is largely overlooked, including as *Transition* or *Adaptation* sites within Our Productive City as illustrated in FIGURE 2.4. Similarly, the locality is not subject to an existing or proposed neighbourhood plan.

**FIGURE 2.4: Brisbane’s Industrial Areas**



Source: Brisbane Our Productive City

## 2.4 The Stafford Industrial Area

The Stafford industrial area predominantly comprises low and medium impact industry uses and a very strong mix of non-industrial activities including offices, showrooms, retail and indoor sport and recreation, as well as the large Stafford Tavern, which is approved for an expansion to include a 43-room motel.

Across the area, there is some 8.4 hectares of General industry A zoned land, 8.3 hectares of Low impact industry zoned land and just 1.8 hectares of General industry B zoned area.

Urban Economics' analysis of buildings within the industrial zones of Stafford indicates some 92,000m<sup>2</sup> of ground floor building GFA of which:

- 26.1% (24,003m<sup>2</sup>) is utilised for industrial activities;
- 27.3% (25,146m<sup>2</sup>) is utilised for retail and showroom activities;
- 7.2% (6,583m<sup>2</sup>) is utilised for office-based activities;
- 29.8% (27,408m<sup>2</sup>) is utilised for other commercial non-industrial activities; and
- 6.4% (5,898m<sup>2</sup>) is vacant (as at May 2026).

Overall, it is considered development within Stafford has overtaken planning for the area, which continues to support a broader range and diversity of businesses and enterprises than simply industrial activities.

This dynamic is estimated to be supporting a higher level of employment within Stafford than would be the case if the locality had maintained low intensity industrial uses and passive storage.

## 2.5 Implications

The proposed development represents an innovative use of an industrial zoned premises within Stafford, an area which has undergone a transition over time to establish as a diverse employment precinct.

The proposed development seeks to adaptively utilise an existing vacant premises, without inhibiting the future use of the building and site for industrial purposes.

## 3.0 Study Area Analysis

### 3.1 Study Area Definition

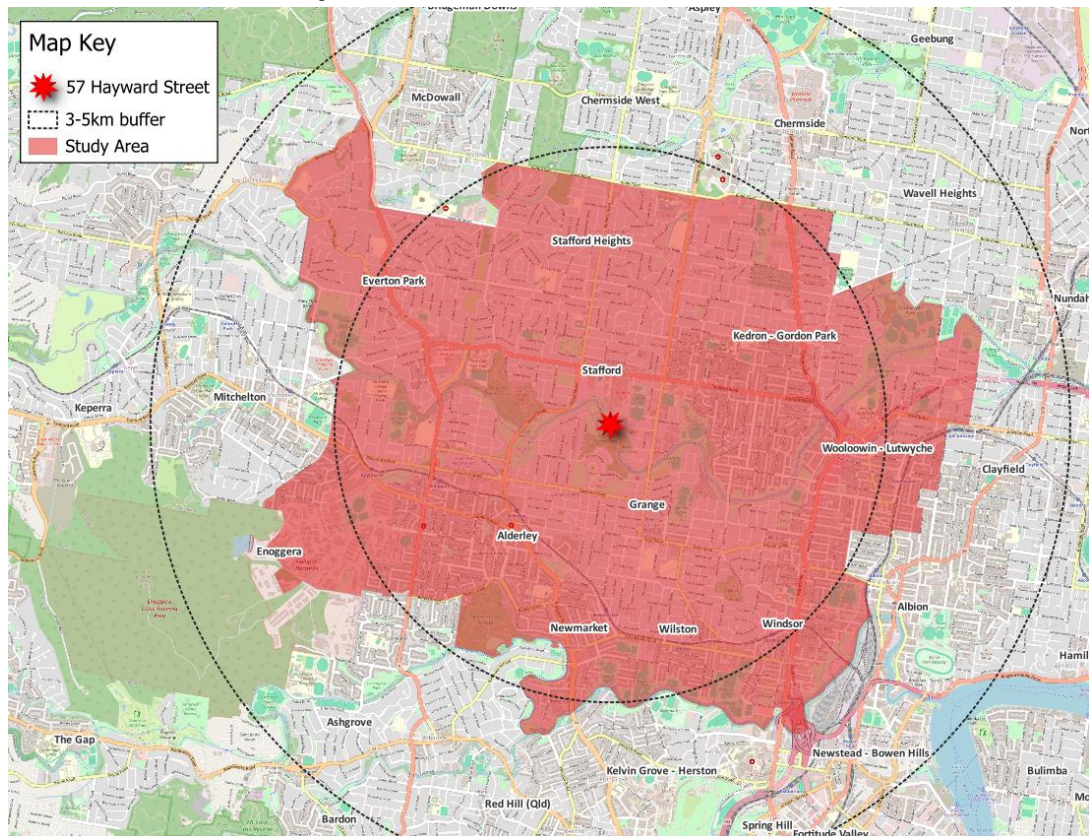
This section outlines the catchment area from which a review of the demographic and socio-economic profiles of communities would be based, as well as current and future population and household growth.

The Study Area communities, as illustrated in FIGURE 3.1, have been defined on the following basis:

- Natural and physical boundaries such as the Kedron Brook and Enoggera Creek;
- A 3km radial distance of the subject site;
- Statistical Area Level 2 (SA2) boundaries; and
- Existing road and commuter networks.

The catchment includes the SA2s of Stafford, Stafford Heights, Kedron-Gordon Park, Woolloowin-Lutwyche, Windsor, Grange, Newmarket, Alderley, Everton Park and Enoggera.

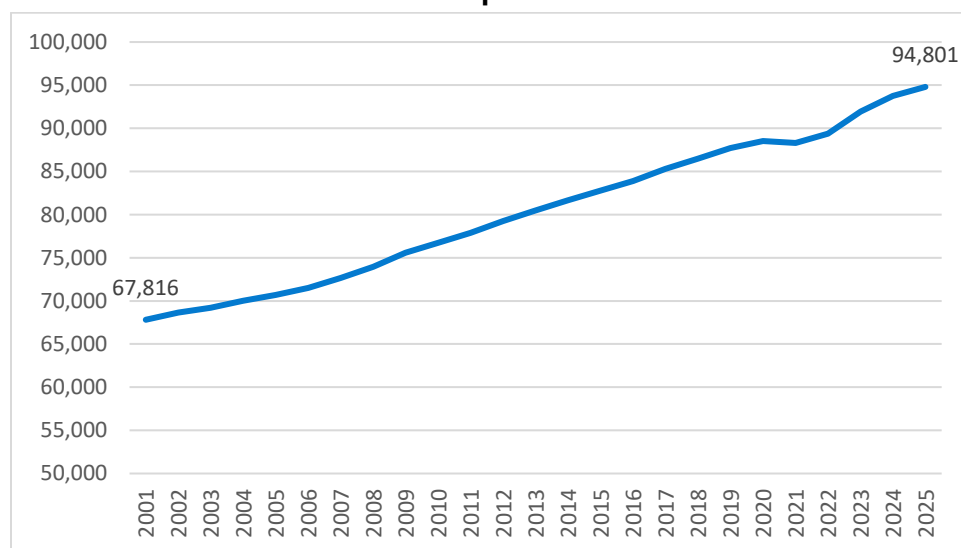
**FIGURE 3.1: The Study Area**



## 3.2 Population and Household Growth

Population growth within the Catchment Area has moderately increased over time as illustrated in FIGURE 3.2 to include some 94,800 residents as at July 2025, significantly in advance of population projections summarised in TABLE 3.1. In the decade to 2025, the resident population within the Catchment Area increased by some 12,000 persons or ~1.4% per annum over this period.

**FIGURE 3.2: Catchment Area Population Growth**



Source: ABS

The Queensland Government Statistician's Office (QGSO) 2023 medium series projections for the Catchment Area are outlined in TABLE 3.1, anticipating almost 103,000 persons by 2046.

**TABLE 3.1: QGSO Medium Series Projections**

SA2	2021	2026	2031	2036	2041	2046
Alderley	6,691	7,158	7,596	8,004	8,447	8,940
Enoggera	9,205	9,147	9,400	9,787	10,332	10,818
Everton Park	10,194	10,825	11,472	12,229	13,049	13,851
Stafford	7,020	7,311	7,550	7,825	8,059	8,212
Stafford Heights	7,233	6,991	6,878	6,783	6,733	6,703
Kedron - Gordon Park	14,694	15,329	15,716	16,062	16,629	17,334
Wooloowin-Lutwyche	11,234	11,687	12,106	12,610	13,216	14,064
Windsor	8,126	8,708	9,081	9,486	10,233	11,195
Grange	4,696	4,783	4,891	4,978	5,071	5,161
Newmarket	5,166	5,664	5,853	5,993	6,185	6,408
<b>TOTAL</b>	<b>84,259</b>	<b>87,603</b>	<b>90,543</b>	<b>93,757</b>	<b>97,954</b>	<b>102,686</b>

Source: QGSO

### 3.3 Demographic and Socio-Economic Profiles

TABLE 3.2 summarises the demographic profile of the Catchment Area community at the time of the 2021 Census, with broader comparisons to the Brisbane LGA and Queensland averages. Relevant key features of these communities included:

- A younger population profile than both the LGA and Queensland, with the 15–29 age group comprising 24% of the population (compared with 22.2% in the LGA and 19.1% statewide). The proportion of residents aged 60+ is also lower than both benchmarks. The 35-39 cohort is broadly consistent with the LGA at around 43% and approximately 4% higher than Queensland overall, indicating a strong working-age population base and a key market for the proposed indoor sport and recreation development;
- A comparably higher workforce participation rate than both benchmarks, approximately 5 percentage points above the LGA and 10 percentage points above Queensland, suggesting a higher economically active population and potential demand for flexible recreation options;
- A relatively higher average household income for households within the Catchment Area, which was recorded at \$126,870, compared to that for the LGA and state at \$123,080 and \$104,470 respectively, indicative of a community with a stronger discretionary spending capacity, including relevant recreation and membership affordability;
- A more medium-density housing mix than surrounding regions, with lower detached housing (59.2%) and higher proportions of flats/units than both the LGA and Queensland, indicating an urbanised, higher-density living environment and a community which are less likely to have health and fitness facilities at home;
- A smaller share of household vehicle ownership than surrounding areas, with 41.1% of households owning one vehicle and fewer than 14.4% owning more than three (versus 16.6% in Brisbane and 21.5% in state);
- Higher proportions of professional and white-collar workers and subsequently lower industrial and blue-collar workers within the manufacturing, construction, wholesale trade, transport, postal & warehousing industries; and
- A heightened proportion of rented dwellings (44.1%) c.f. Brisbane (38.3%) and QLD (33.1%).

**TABLE 3.2: Demographic Profile**

<b>Demographic</b>	<b>Catchment</b>	<b>Brisbane</b>	<b>Queensland</b>
<b>Age Profile (%)</b>			
0-14yrs	17.1	17.4	18.7
15-29yrs	24.0	22.2	19.1
30-59yrs	43.5	42.1	39.4
60+yrs	15.3	18.3	22.8
<b>Average Annual Household Income (\$)</b>			
	126,870	123,080	104,470
<b>Labour Force (%)</b>			
Unemployment Rate	3.9	5.0	5.4
Workforce Participation Rate	76.4	71.0	65.8
<b>Occupation Profile (%)</b>			
Managers/Administrators	14.3	14.0	12.5
Professionals	34.2	32.0	21.4
Technicians & Trade Workers	9.9	9.9	13.7
Community & Personal Service Workers	11.0	10.5	12.3
Clerical & Administrative Workers	13.0	13.1	12.7
Sales Workers	7.4	7.7	8.7
Machine Operators & Drivers	3.2	4.3	6.8
Labourers	5.8	6.9	10.1
Inadequately Described/Not Stated	1.3	1.6	1.9
<b>Industry Profile (%)</b>			
Agriculture, forestry & fishing	0.3	0.4	2.6
Mining	1.4	1.3	2.3
Manufacturing	3.2	4.7	5.7
Electricity, gas, water & waste services	1.1	1.1	1.2
Construction	6.7	6.7	9.1
Wholesale trade	1.8	2.4	2.4
Retail trade	7.8	8.2	9.3
Accommodation & food services	6.3	7.0	7.2
Transport, postal & warehousing	3.9	4.6	4.7
Information media & telecommunications	1.4	1.4	1.0
Financial & insurance services	4.2	4.0	2.6
Rental, hiring & real estate services	1.8	2.0	1.8
Professional, scientific & technical services	12.3	11.5	6.7
Administrative & support services	3.2	3.3	3.4
Public administration & safety	9.6	6.9	6.2
Education & training	9.5	9.8	8.8
Health care & social assistance	17.2	15.7	15.4
Arts & recreation services	1.8	1.8	1.5
Other services	3.1	3.4	3.9
Inadequately described/Not stated	3.2	4.0	4.5
<b>Highest Level of Education (%)</b>			
Post Graduate Degree	8.9	9.7	4.7
Graduate Diploma & Graduate Certificate	4.1	3.4	2.2
Bachelor Degree	27.1	25.0	15.0
Advanced Diploma	9.7	9.7	9.4
Certificate	15.4	14.9	22.1
Not Stated/Inadequately Described	6.0	6.5	9.0

<i>Not Applicable</i>	28.7	30.8	37.5
<b>Home Ownership (%)</b>			
<i>Owned Outright</i>	21.3	25.3	29.1
<i>Mortgage</i>	32.3	33.7	34.4
<i>Rent</i>	44.1	38.3	33.1
<i>Other/Not Stated</i>	2.2	2.7	3.4
<b>Structure of Dwellings (%)</b>			
<i>Separate House</i>	59.2	62.6	74.8
<i>Semi-detached/Row/Terrace/Townhouse</i>	11.1	11.3	11.7
<i>Flat/Unit</i>	29.6	25.6	12.5
<i>Other/Not Stated</i>	0.1	0.5	1.0
<b>Number of Vehicles Per Dwelling (%)</b>			
<i>0</i>	8.0	8.0	5.7
<i>1</i>	41.1	39.1	35.2
<i>2</i>	36.3	36.3	37.5
<i>3</i>	9.3	10.3	12.8
<i>4+</i>	4.2	5.1	7.2
<i>Not Stated</i>	1.0	1.2	1.5
<b>Relationship in Household (%)</b>			
<i>Couple in Registered Marriage/De Facto Relationship</i>	45.0	45.8	46.1
<i>Lone Parent</i>	4.0	4.0	4.9
<i>Child Under 15yr</i>	17.5	17.8	19.0
<i>Dependent Student (15-24yr)</i>	5.1	5.5	4.7
<i>Non-dependent Child</i>	4.0	5.0	5.8
<i>Other in Family Household</i>	4.0	4.2	4.0
<i>Group Household Member</i>	6.5	5.9	3.8
<i>Lone Person</i>	12.3	10.2	9.8
<i>Visitor in Household (from within Australia)</i>	1.6	1.6	1.9

Source: ABS Census

### 3.4 Working Population

Despite the quantum of industrial zoned land within Stafford, almost 80% of the working population were not within industrial sector industries at the time of the 2021 Census. Key industries of employment within the locality were professional, scientific and technical services retail trade and health care and social assistance.

This dynamic is supported by the analysis in Section 2.4, which indicates that the former industrial orientation of Stafford has been overtaken by business and worker needs. Furthermore, the Stafford industrial area is no longer considered a key industrial area for contemporary industrial businesses, which increasingly requires access to major transport and energy infrastructure.

**TABLE 3.3: Working Population (Place of Work) by Industry – Stafford**

INDUSTRY	No. of Workers	% of Workers
Professional, Scientific and Technical Services	809	16.5%
Retail Trade	764	15.6%
Health Care and Social Assistance	722	14.7%
Construction	453	9.2%
Accommodation and Food Services	339	6.9%
Other Services	219	4.5%
Education and Training	210	4.3%
Transport, Postal and Warehousing	185	3.8%
Manufacturing	175	3.6%
Inadequately described	167	3.4%
Wholesale Trade	149	3.0%
Public Administration and Safety	144	2.9%
Administrative and Support Services	121	2.5%
Electricity, Gas, Water and Waste Services	119	2.4%
Information Media and Telecommunications	97	2.0%
Arts and Recreation Services	82	1.7%
Financial and Insurance Services	74	1.5%
Rental, Hiring and Real Estate Services	41	0.8%
Not stated	37	0.8%
Mining	5	0.1%
Agriculture, Forestry and Fishing	0	0.0%
Not applicable	0	0.0%
<b>TOTAL</b>	<b>4,912</b>	<b>100%</b>

Source: ABS

### 3.5 Implications for the Subject Site

The Catchment Area encapsulates a community of residents and workers which represent a key market for the proposed indoor sport & recreation use. Supporting a younger, professional and working age population with above average incomes indicates the heightened propensity of this community to utilise fitness, health and wellness facilities.

Ongoing growth within the Catchment Area is anticipated to further enhance the demand for residents to access local fitness, health and wellness facilities such as is proposed at the subject site.

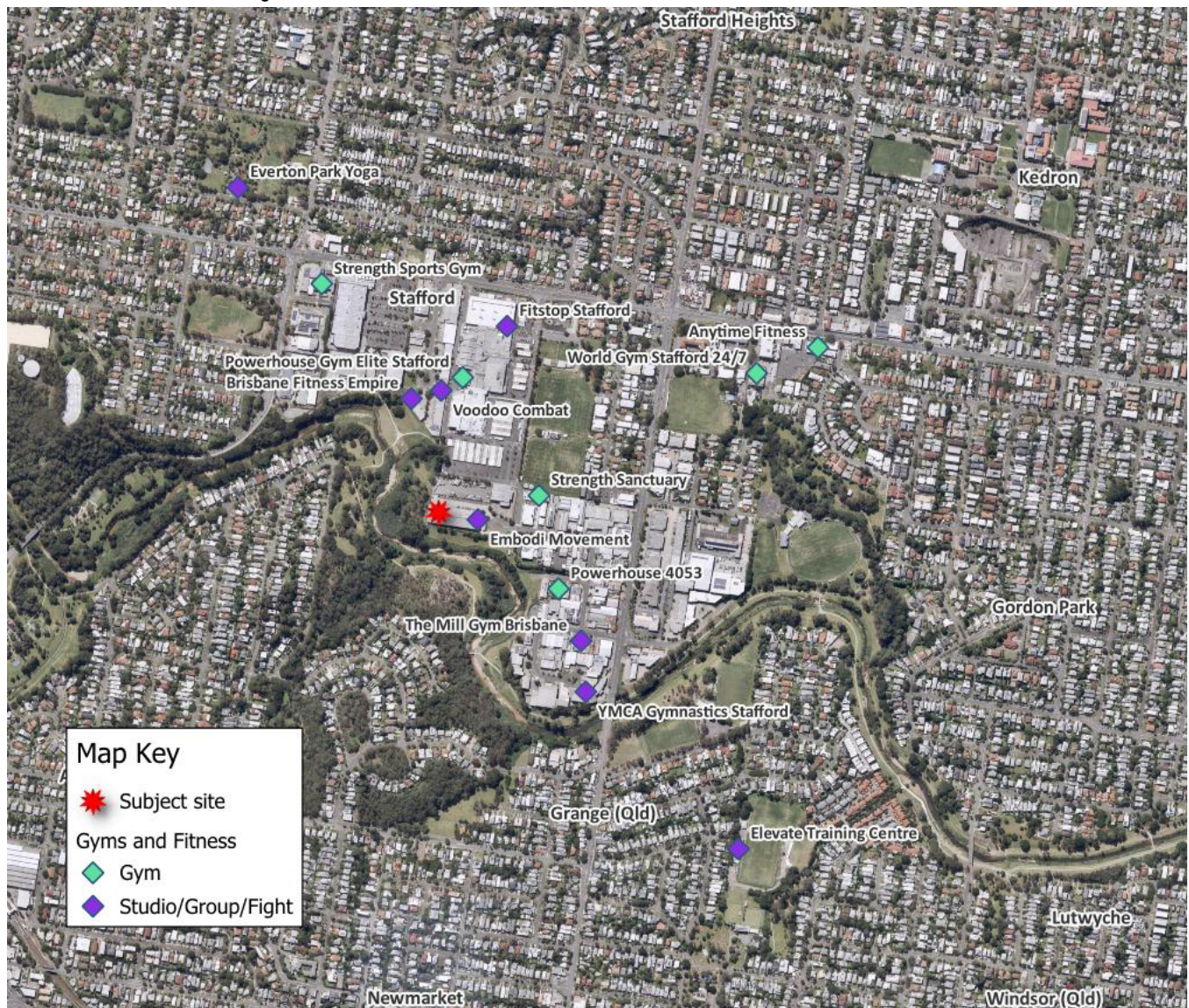
# 4.0 Indoor Sport and Recreation

## 4.1 Fitness, Health and Wellness Facilities

Stafford is identified as a hub for sport, fitness, health and wellness; highlighted by the numerous gym and fitness facilities as illustrated in FIGURE 4.1, together with the numerous sporting fields and facilities of the locality.

TABLE 4.1 further lists these facilities and other relevant gyms within the broader Catchment Area, together with their identified floor area/scale.

**FIGURE 4.1: Local Gymnasium and Fitness Facilities**



Notably, the majority of gym and fitness facilities within the Catchment Area are not large-format (>~1,500m<sup>2</sup>) with only the World Gym at Stafford which has located within the former Stafford skating rink and Genesis Health and Fitness at Windsor.

**TABLE 4.1: Gym and Fitness Facilities**

Name	Type	Size (m <sup>2</sup> )
World Gym Stafford 24/7	Gym	2,500
Genesis Health and Fitness Windsor	Gym	2,000
YMCA Gymnastics Stafford	Studio/Group/Fight	800
Powerhouse Gym Elite Stafford	Gym	750
Fernwood Fitness	Gym	750
Voodoo Combat	Studio/Group/Fight	600
Anytime Fitness	Gym	575
Plus Fitness 24/7 Everton Park	Studio/Group/Fight	400
Strength Sanctuary	Gym	300
Powerhouse 4053	Gym	300
Physical Addiction Gym Stafford	Gym	300
Infinity Martial Arts	Studio/Group/Fight	300
The Mill Gym Brisbane	Studio/Group/Fight	260
Strength Sports Gym	Gym	250
Fitstop Stafford	Studio/Group/Fight	200
Brisbane Fitness Empire	Studio/Group/Fight	200
Perform 360 Enoggera	Studio/Group/Fight	200
Embodi Movement	Studio/Group/Fight	
Everton Park Yoga	Studio/Group/Fight	
Club Pilates Kedron	Studio/Group/Fight	
BFT Everton Park	Studio/Group/Fight	
Snap Fitness 24/7 Everton Park	Gym	
Fitstop Everton Park	Studio/Group/Fight	
Elevate Training Centre	Studio/Group/Fight	

Other relevant health and wellness facilities within the Catchment Area include P3 Recovery which offers ice baths, contrast therapy, saunas, compression therapy, hyperbaric oxygen therapy and is located within Stafford City Shopping Centre, and CityCave at 471 South Pine Road, Everton Park.

Overall, there are no established facilities which intergrate a large-format gymnasium with group and studio training facilities and health and wellness recovery offerings as outlined in FIGURE 4.2.

**FIGURE 4.2: Comparative Gym and Fitness Offering**

	PROPOSED ISR	WORLD GYM	POWERHOUSE	ANYTIME FITNESS	STRENGTH SANCTUARY	PURE GYM	STRENGTH SPORTS GYM	STAFFORD FITNESS	STRENGTH SPORTS GYM	YMCA	FITSTOP
Gym	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
General Group Classes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Specialist Group Classes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
General Personal Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Specialist Personal Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Body Scans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3D Body Scans	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sports Physio	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reformer Pilates - Virtual	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reformer Pilates - Live	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Yoga	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hot Yoga	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Functional Group Training	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hot Spa	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cold Plunge	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Magnesium Hot Pools	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Magnesium Cold Pools	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Magnesium Warm Pools	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Infrared Saunas	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Steam Room	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Redlight Therapy Bed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Massage Guns	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compression Boots	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Massage Chairs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hydro Massage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TOTAL SERVICES OFFERED	25 / 25	7 / 25	6 / 25	6 / 25	5 / 25	3 / 25	2 / 25	2 / 25	1 / 25	1 / 25	1 / 25

## 4.2 Proposed and Approved Development

The following outlines relevant development applications and approvals for the proposed development, identified within Brisbane City Council’s Development I portal. Overall, there are no particularly competitive or complementary projects of note, outside of the formalisation of established indoor sport and recreation premises and a lack of development applications for existing indoor sport and recreation uses which are established within Stafford’s industrial zones.

A007012516 – 4/32 Windorah St, Stafford – This development application seeks to formalise the use of an existing indoor sport and recreation use (Voodoo Combat) within the Specialised centre zone (Mixed Industry and Business) at Stafford.

A006855857 30 Glentanna St, Kedron – An array of centre activities are seeking preliminary approval as part of the Bakery Square project at Kedron. Proposal plans indicate the intention for up to 1,500m<sup>2</sup> of indoor sport and recreation tenancies as part of the masterplan.

A006691040 - 78 Farrington St, Alderley - Numerous centre activities are seeking preliminary approval as part of the Alderley Station Square project, including for indoor sport and recreation.

## 4.3 Implications

There are numerous small and medium gyms, fitness studios, group fitness operations and martial arts gyms within Stafford and the defined Catchment Area and a dispersed mix of wellness and recovery facilities. However, there is a distinct lack of integrated large-format gymnasiums and no comparable facilities which provide the extensive integration of fitness, health and wellness facilities at the subject site.

Moreover, there is a clear intent or preference for indoor sport and recreation facilities to locate within suitable premises within the industry and specialised centre zones within Stafford, which meet the operational requirements of these facilities.

## 5.0 Demand Analysis

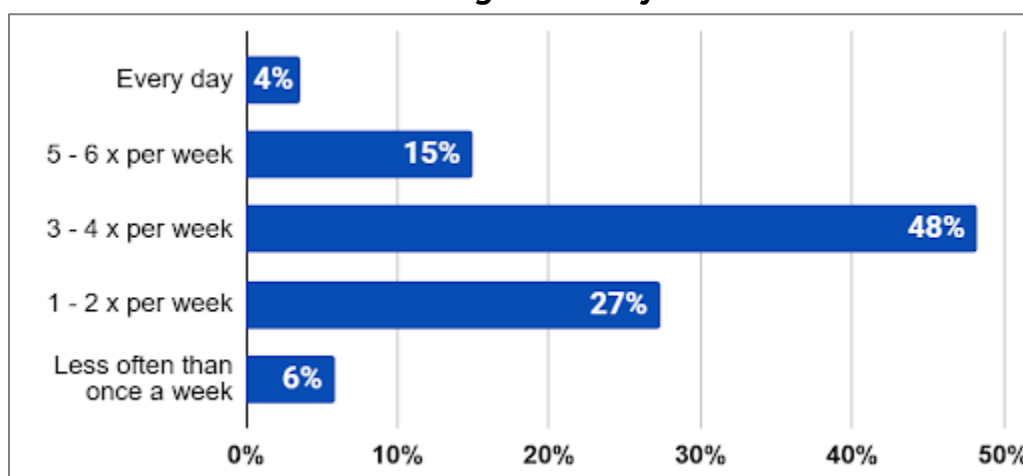
### 5.1 Trends

- The latest IBIS World report (August 2025) indicated there were 6,904 gymnasiums and fitness centres in Australia (2025-26), representing around 3,988 persons per gym facility. The industry recorded a total revenue of \$2.8 billion within this time, growing substantially over the previous decade.
- Similarly, IBIS World identified 657 health and wellness spas businesses nationally as of 2025, a decrease of -3.4% from 2024.
- Gymnasiums and fitness centres together with the health and wellness spas industry has experienced growth driven by several key factors over the past few years, including in the period post-Covid such as
  - a rising focus on healthy lifestyles;
  - a trend towards fitness, health and wellness facilities as key 'third places' for socialization and interaction;
  - increasing household discretionary incomes; and
  - a growing preference for premium, luxury, comprehensive and integrated facilities and experiences.
- Conversely, heightened cost-of-living pressures and interest rate hikes are anticipated to have a limiting effect on fitness, health and wellness spending in the short term. The gyms and fitness centres industry has experienced turbulent conditions over the past few years and while overall revenue has fallen post-pandemic as cost-of-living pressures intensify and membership growth has stalled, and budget-conscious consumers are drawn to less costly options like outdoor exercises.
- The latest report from the Health & Fitness Association found 75 per cent of gym-goers actively preferred group classes and social workout experiences;
- In this new wellness era, young people are trading the pub for the pilates studio, expanding their social circles at the gym and celebrating milestones at day spas;
- Boutique studios and 24-hour budget gyms have also become increasingly popular, providing competitive pricing for patrons and fuelling competition. As such, franchises

like Anytime Fitness have grown more favourable among gym-goers in recent years, with the operator recording a ~17% market share in 2022.

- Data collated by Ausplay between 2023 and 2025 reported some 6.8 million adults in Australia aged 15+ utilise a gym or some sort of fitness facility for physical activity and exercise on an annual basis, representing a 30.4% participation rate nationwide, with 67% of participants taking part at least once a week. Moreover, peak participation age ranges from 18-24 years of females and 25-34 years for male participants. More specifically, a state-by-state comparison saw Queensland with the third highest participation rate per annum of 21% (1.4 million participants).
- A total of \$3 billion per annum was spent on fitness/gym participation (15+ population), with a recorded average expenditure per annum of each participant at \$858 over this time. Results from a survey conducted by Canstar noted that gym-goers across Australia spent an average of \$77 per month on gym memberships, or \$924 per year in 2025.

**FIGURE 5.1: How Often Aussies go to the Gym**



Source: [Canstar.com.au](http://Canstar.com.au) (2026)

- Furthermore, an upward trend in participation is observed in line with higher income levels, with data indicating a 2.8% increase in participation (29.9% to 32.7%) between those earning \$70k-\$99k and the population with an income of \$100k-\$149k. A further 6% rise in participation is demonstrated between this cohort and those earning \$150k-\$199k.
- In 2025, gyms/fitness clubs/leisure centres were indicated as the third most common place for participation in physical activity for the population aged 15+, with more than 6.1 million estimated participants, representing 28% of all recorded participants.

## 5.2 Demand for Indoor Sport and Recreation

Gym membership bases for large-format gymnasiums substantially vary to small facilities and typical 24/7 access gymnasiums. It is estimated that a large-format gymnasium in the order of 2,000m<sup>2</sup> such as the proposed development, World Gym and Goodlife requires a member base of 4,000 to 5,000 persons whilst typical gymnasiums include member bases between 1,500 and 2,000 persons and specialty facilities (Fitstop/functional fitness) have small member bases of 300 to 500.

Given that the proposed development includes a unique integration of fitness, health and wellness activities, it is envisaged that demand may be supported by an even broader geographic and demographic base than typical large-format gymnasiums.

There were an estimated 79,600 persons within the Catchment Area aged 15+ years as at June 2025 (~84% of the resident population). Based on small area labour market data for this same period, the Catchment Area also supported a very high labour force participation rate of approximately 75.8% compared to 71.2% in Brisbane; indicative of a community which would have a heightened propensity to utilise fitness facilities and memberships.

Furthermore, comparative Commbank iQ expenditure data outlines that Catchment Area residents spent some \$7.84 million on *Fitness Clubs & Gyms* in 2024/25, equivalent to approximately \$83 per person whilst residents of Brisbane (LGA) recorded ~\$103 million of expenditure in this category or \$75 per person.

Adopting an above average gym utilisation/membership rate of 40% for persons aged 15+ within the Catchment Area, there is estimated to be a demand for ~32,000 memberships from residents of the area alone, which would sustain an estimated six to seven large-format facilities. Comparatively just two large-format gyms are provided within the Catchment Area (World Gym & Genesis) and the equivalent floorspace of another two large format gyms across smaller establishments of the area, suggesting a significant gap in the provision of facilities for the community in the order of 2-3 large format gymnasiums.

Population projections for the Catchment Area indicate some 20,000 additional residents between 2026 and 2046 which at assumed participation and utilisation rates, would generate demand for an estimated 2,500-2,750m<sup>2</sup> of gymnasium floorspace over this period, equivalent to 1-2 large format gyms.

Additional demand may also be drawn from the commuting and non-resident workforce of the surrounding area, including defence force personnel of the nearby Enoggera Barracks. At the time of the 2021 Census, SA2s within the Catchment Area included some 25,760 workers (by place of work) of which just ~7,500 were also residents of the locality, indicating a non-resident working population of more than 18,000 persons at the time. This non-resident workforce may represent a potential membership base of some 7,200 persons which would support 1-2 equivalent large format gyms in their own right.

### 5.3 Demand for Industry/Warehouse

While industrial land is located throughout suburban Brisbane, Stafford is not identified as a Major Industrial Area, Transition Site or Adaption Site within Brisbane's industrial strategy as outlined in Section 2.3 above. This is attributed to the locality's comparative disadvantage in the provision of infrastructure which supports contemporary industrial businesses such as key road, sea and air freight connections. Access to major arterial roads such as the M1, Gateway and Logan Motorways continues to be a key driver of industrial demand and takeup within SEQ, an element not afforded to the Stafford industrial area.

Moreover, older industrial areas of inner-Brisbane have become or are becoming obsolete for industrial purposes, particularly as underlying land values continue to support higher and better land uses such as for residential, retail and commercial services, a dynamic which is already apparent in Stafford for which just ~26% of floorspace within the industrial zone is utilised for industrial purposes. Anecdotally, it is also noted that much of the occupied industrial and warehouse uses are for passive storage and do not support significant employment.

Urban Economics' inspections and searches have identified some 6,000m<sup>2</sup> of vacant floorspace across premises of the Stafford industrial area, ~8,000m<sup>2</sup> including the subject premises which is identified as the largest vacant contiguous space in the locality and the only vacant space capable of supporting the proposed large-format fitness, health and wellness facility.

It is Urban Economics' view that the extent of vacant buildings within the Stafford industrial precinct, together with the ongoing transition of the locality demonstrates the difficulty for the precinct in attracting industrial users and business and the low level of demand for industry within the area.

## 6.0 Assessment of Need

There is assessed to be a strong level of economic and community need for the proposed Indoor Sport and Recreation use and the subject site is ideally located to meet this need. Similarly, there is assessed to be no alternative suitably zoned or available premises within the area which could support this need.

### Economic Need

- Population growth and the evolution of the Stafford Catchment Area's demographic profile underscore a growing need for local services and facilities, including for indoor sport and recreation uses which would meet these needs;
- The Catchment Area is projected to support an additional 20,000 residents towards 2046, on top of a growth profile which is substantially exceeding population projections for the locality;
- There is estimated to be a gap in the provision of indoor sport and recreation floorspace to meet the needs of the Catchment Area's resident and worker populations in the order of 6,000-9,000m<sup>2</sup> by 2046, a need which would be partially met by the proposed development at the subject site;
- There is a limited demand for contemporary industrial businesses in Stafford which are increasingly seeking to locate within major industrial areas supported by key infrastructure. The subject premises as an industrial use is most likely to support passive storage and warehousing, representing a low economic and employment outcome, compared to the active operations of the proposed development.

### Community Need

- The Stafford locality and Catchment Area is typified by dual income working households with above average incomes and noted disposition for active and healthy lifestyles. The proposed development would compliment this community, meeting their existing and aspirational needs;
- Stafford is recognised to be in the midst of ongoing suburban renewal and development including medium density housing projects and enhancements to local activity centres. The proposed development would support this renewal through the provision of local indoor sport and recreation facilities, in lieu of legacy industrial development.

- The proposed development would provide choice and competition within the Catchment Area's fitness, health and wellness market, including the provision of a unique facility which is not currently available within the locality.

### Planning Need

- Brisbane's industrial strategy *Our Productive City* acknowledges the transition of the City's legacy and under-utilised industrial areas such as Stafford "*that can be reimagined for suburban and urban renewal, which will create mixed-use outcomes to boost job opportunities and housing supply.*" Whilst Stafford is largely overlooked within the strategy, there is a clear planning need for the area to be contemplated in this light, as the role and function of traditional industrial uses fades and ongoing suburban renewal progresses;
- The proposed development would not prejudice the ongoing or future use of the subject site for industrial purposes, by adaptively reusing an existing premises which can be 'made good' for ongoing industrial use;
- There are no available premises within suitably zoned areas of the Catchment Area such as within the Specialised centre or Centre zone which could accommodate the scale of the proposed development
- Urban Economics' scan of available sites and land within the area has not identified any alternative potential sites/premises which are available or suitable; a scenario confirmed by the proponent in their more than 12 month search for a location and the Letter of Support from experienced local commercial and industrial agency Raine + Horne Commercial (Brisbane North).

## Impacts and Benefits

It is Urban Economics' view that the utilisation of the subject site for indoor sport and recreation would not negatively impact upon the role and function of the Stafford industrial precinct nor the community which it services. Moreover, the proposed development would occupy less than 2% of the non-residential floorspace within the Stafford industrial area and an immaterial proportion of the City's industrial activity and employment lands, whilst reducing the high level of vacancy within the area.

Furthermore, the proposed development is estimated to provide a significant net employment benefit, over and above the premises likely alternative use for passive storage and warehousing or long-term vacancy. A net employment benefit of 45 jobs are estimated to be supported by the proposed development including:

- 8 full-time;
- 5 part-time;
- 7 casual;
- 15 instructors; and
- 10 personal trainers.

These jobs would similarly contribute to an equivalent net wages and micro-business income of \$2.5-\$3 million annually.

Fit out and construction of the proposed development is estimated to have a direct construction effect of \$7.5 million and employ some 100 construction workers and contractors over the construction period. Flow on effects of construction to the broader Brisbane and SEQ economies is estimated to generate a further \$5.25 million in indirect economic impact, representing a total construction effect of ~\$12.75 million.

Overall, the proposed development would have a substantial net employment and economic benefit for the local and regional economy than if the subject premises was retained for industrial uses such as passive storage and warehousing.

## 7.0 Conclusions

This Report has examined the economic, community and planning need for the proposed Indoor Sport and Recreation Facility at 57 Hayward Street, Stafford, together with the potential implications of the proposal for the Stafford industrial precinct and broader catchment community.

The assessment demonstrates that the proposed development would respond to a clear and growing demand for contemporary fitness, health and wellness facilities within the catchment. The locality supports a substantial and increasing resident and worker population characterised by younger working-age households, above-average workforce participation, comparatively high household incomes and an established propensity toward active lifestyles and fitness participation.

The proposed development would introduce a unique large-format indoor sport and recreation offering which integrates gymnasium, wellness, recovery and studio-based activities within a single destination. While Stafford already supports a range of smaller gyms and specialist fitness operators, there remains a clear gap in the provision of integrated large-format facilities capable of servicing the evolving needs of the catchment population.

Population growth projections, participation trends and expenditure analysis indicate that the catchment is capable of supporting additional indoor sport and recreation floorspace over the medium to long term, including facilities comparable in scale to the proposed development. This demand is further reinforced by the significant non-resident workforce operating within and surrounding Stafford.

The assessment also demonstrates that the Stafford industrial precinct has already undergone substantial transition away from a traditional industrial role. A significant proportion of existing floorspace is now occupied by retail, showroom, office and other commercial uses, while industrial vacancy remains elevated. Contemporary industrial demand within South East Queensland is increasingly concentrated within major strategic industrial areas supported by regional freight infrastructure, a competitive advantage not afforded to Stafford.

Within this context, the proposed adaptive reuse of the subject premises represents an appropriate and economically productive utilisation of a long-vacant tenancy. The proposal would support employment generation, economic activation and improved service provision without materially impacting the function or viability of the broader industrial precinct.

Importantly, the proposed use would not sterilise the site for future industrial purposes. The development largely relies upon the adaptive reuse of an existing building and could reasonably be reverted to industrial or warehouse activities in the future should market demand change.

The assessment further identifies that there are no alternative suitably zoned or available premises within the catchment capable of accommodating the operational and floorspace requirements of the proposed facility. The proposal therefore addresses an identified gap in the market which cannot presently be accommodated elsewhere within the locality.

Overall, it is Urban Economics' opinion that the proposed Indoor Sport and Recreation Facility at 57 Hayward Street, Stafford represents a justified and appropriate development outcome having regard to:

- The demonstrated economic and community need for additional indoor sport and recreation facilities;
- The evolving role and function of the Stafford precinct;
- The limited contemporary demand for traditional industrial uses within the locality;
- The adaptive reuse of an existing vacant premises;
- The employment, economic and community benefits generated by the proposal; and
- The absence of material adverse impacts on the ongoing operation of the broader industrial area.

Accordingly, the proposed development is considered to represent a positive planning and economic outcome which would contribute to the continued evolution, activation and diversification of the Stafford locality.