Colliers

Carina Childcare and Residential Need Assessment

141 Fursden Road, Carina

Prepared for Roycorp Pty Ltd

Prepared by Colliers Urban Planning

10 June 2026 | 3230201

Accelerating success.

'Gura Bulga'

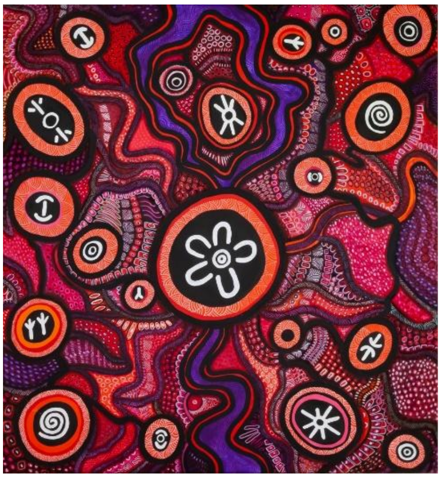
Liz Belanjee Cameron

'Gura Bulga' – translates to Warm Green Country. Representing New South Wales.

'Dagura Buumarri'

Liz Belanjee Cameron

'Dagura Buumarri' – translates to Cold Brown Country. Representing Victoria.



'Gadalung Djarri'

Liz Belanjee Cameron

'Gadalung Djarri' – translates to Hot Red Country. Representing Queensland.

Colliers Urban Planning acknowledges the Traditional Custodians of Country throughout Australia and recognises their continuing connection to land, waters and culture.

We pay our respects to their Elders past and present.

In supporting the Uluru Statement from the Heart, we walk with Aboriginal and Torres Strait Islander people in a movement of the Australian people for a better future.

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This document has been prepared by Ellis Davies and Rita Lu

This document has been reviewed by Sean Stephens

Version No.	Date of issue	Prepared by	Approved by
A (DRAFT)	16/04/2026	ED & RL	SS
B (FINAL)	10/06/2026	ED & RL	SS

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Executive Summary

Site Context

The Subject Site is located at 141 Fursden Road, Carina, approximately 7.5km east of the Brisbane CBD. The proposal is for an 88-place childcare centre across six activity rooms, to be developed in association with 72 Built-to-Rent (BTR) dwellings.

Catchment Area

A Catchment Area has been defined for the proposed childcare centre which reflects the location a short distance east of Creek Road and the distribution of existing childcare centres in the surrounding area. The population of the Catchment Area is projected to increase from 35,200 persons at 2026 to 37,700 persons at 2041.

The Catchment Area is characterised by a relatively typical proportion of family households with children, earning higher income levels and with higher levels of home ownership. The labour force participation rate is above average in the Catchment Area, and residents are more likely employed in white-collar jobs.

Childcare in Australia

Childcare in Australia has evolved significantly over the last 20-years. An increasing number of females are returning to the workforce after childbirth and are looking for long day care options. Over recent years various Federal Governments have significantly boosted spending on childcare.

The long day care participation rate is calculated at 54.2% for children aged 4 years and under in Queensland in 2025, based on the Queensland Early Childhood Education and Care Services (ECEC) Census.

Supply and Occupancy Rates

A total 10 childcare centres are located in the Catchment Area, offering 931 long day care places overall. The distribution of childcare centres includes three situated in each of the suburbs of Carina, Carindale and Carinda Heights, with one in Cannon Hill.

One childcare centre is under-construction, and one has received development approval within the Catchment Area. The two centres are to provide a total of 215 long day care places.

A review of the supply of childcare places compared with childcare enrolments reveals a notional occupancy rate of around 80% across the five SA2s which encompass the defined Catchment Area. This occupancy rate is relatively strong for the catchment.

Childcare Need

The estimated demand for childcare places in the Catchment Area is estimated at 980 places per day at 2029. The future childcare supply would be 1,234 places, inclusive of future centres which are approved as well as the subject proposal. Comparing the estimated demand for childcare places in the Catchment Area with the future supply, inclusive of the subject proposal, results in an average occupancy rate of 79% at 2029.

The effective occupancy rate for the Catchment Area, would allow for adequate choice in the area, while ensuring existing centres are viable and can operate successfully. Therefore, the analysis demonstrates that sufficient demand exists for proposal, based on the available market and the future supply of childcare places in the catchment area.

Conclusion

A future childcare centre at the Subject Site would serve a demonstrated economic and community need for additional childcare places in the Catchment Area. It would cater to the needs of the local population and serve the increasing demand for centre-based childcare places in the area driven by population growth. The proposal would provide an important community service by supporting female workforce participation as well increasing childcare choice for parents. Overall, as it relates to economic and community considerations, the planned childcare centre is an appropriate use for the Subject Site.

Introduction

Background

Roycorp previously submitted a development application over 141 Fursden Road, Carina (described as Lot 2 SP305062) for 90 dwellings, with the application being refused by Brisbane City Council.

The proposed development has now been updated in include an 88-place childcare centre together with 72 Built-to-Rent (BTR) residential dwellings.

A Childcare Need Assessment has been prepared to investigate the community and economic need of the proposed childcare centre, as well as identify the likely benefits and any potential economic impacts associated with the development.

Report Objective

This objective of this report is to examine the market need for the proposed childcare centre at the Subject Site and assess the potential implications if the centre is developed.

Report Structure

This report contains the following chapters:

Chapter 1:	Site Context and Proposed Development
Chapter 2:	Catchment Area Analysis
Chapter 3:	Childcare in Australia
Chapter 4:	Supply of Childcare Centres
Chapter 5:	Childcare Demand, Benefit and Impact Analysis
Chapter 6:	Summary and Conclusion

1.0 Site Context and Proposed Development

This Chapter discusses the site context, reviews the proposed development, and considers the planning context for the development at a high level.

1.1 Subject Site and Location Context

The Subject Site is located at 141 Fursden Road, Carina, approximately 7.5km direct distance east of the Brisbane CBD. Comprising an area approximately 1.36 hectares, the Subject Site is currently undeveloped, relatively flat and cleared with a retaining wall.

Land uses surrounding the Subject Site include detached residential dwellings to the north and south; Brisbane State High School Sporting Complex (including netball/tennis courts and sporting ovals) to the east; and a St Vincent's Aged Care facility and a Presbyterian Church to the west (refer **Figure 1.1).**

Carina is primarily a residential suburb located in inner eastern Brisbane. Access to the suburb from the surrounding area is principally provided by Creek Road, a major north-south traffic route through the area. Other key transport routes through this part of Brisbane include Old Cleveland Road to the south and the Gateway Motorway to the east, refer **Figure 1.2**.

The proposed childcare centre would be conveniently accessible to the surrounding area, with Fursden Road connecting directly to Creek Road some 300m to the west of the Subject Site. The child care centre is a community facility which would complement other facilities in the local area, including the nearby aged care facility, church and sporting complex.

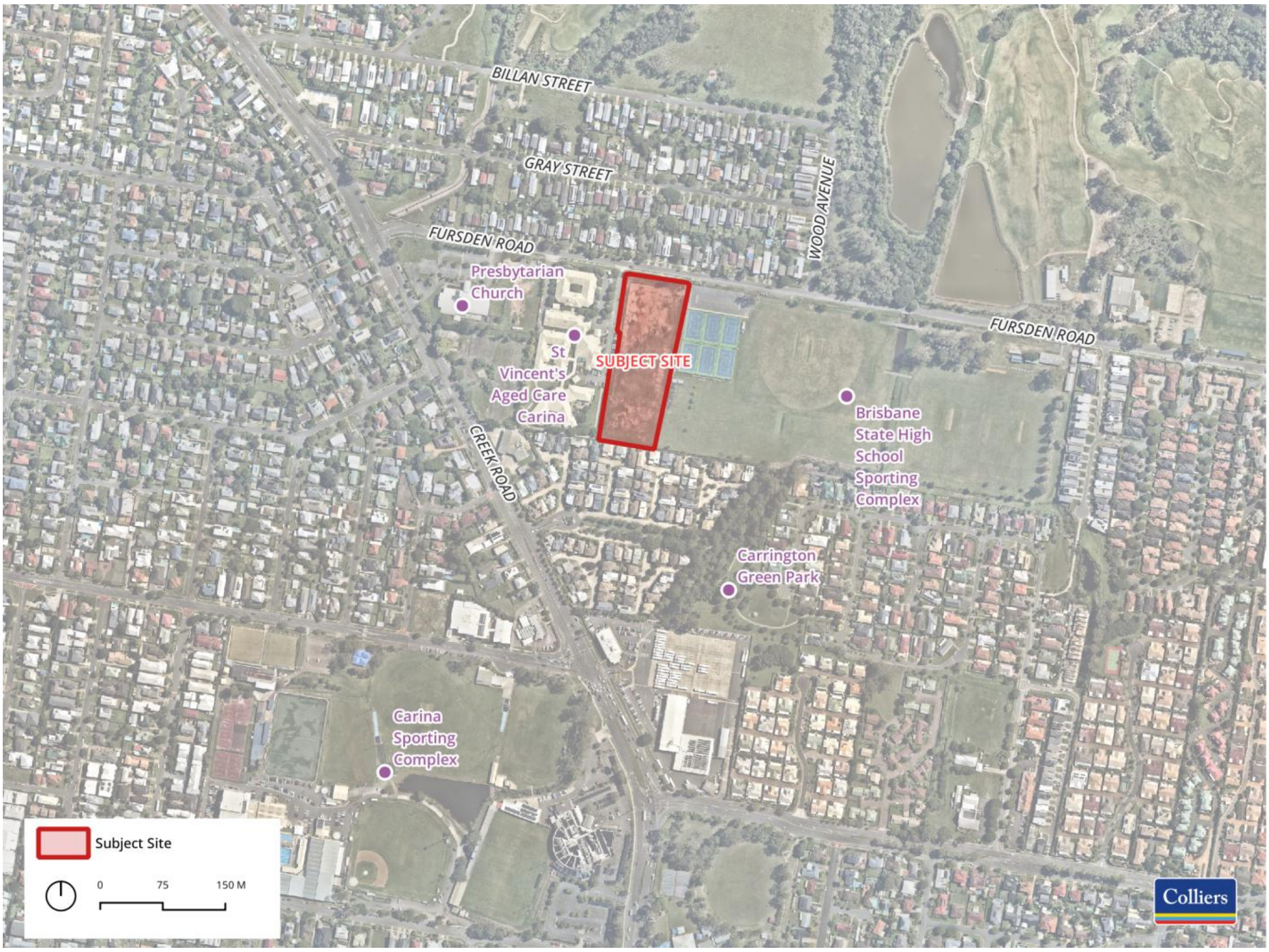


Figure 1.1 Subject Site and Local Context

Source: Colliers Urban Planning

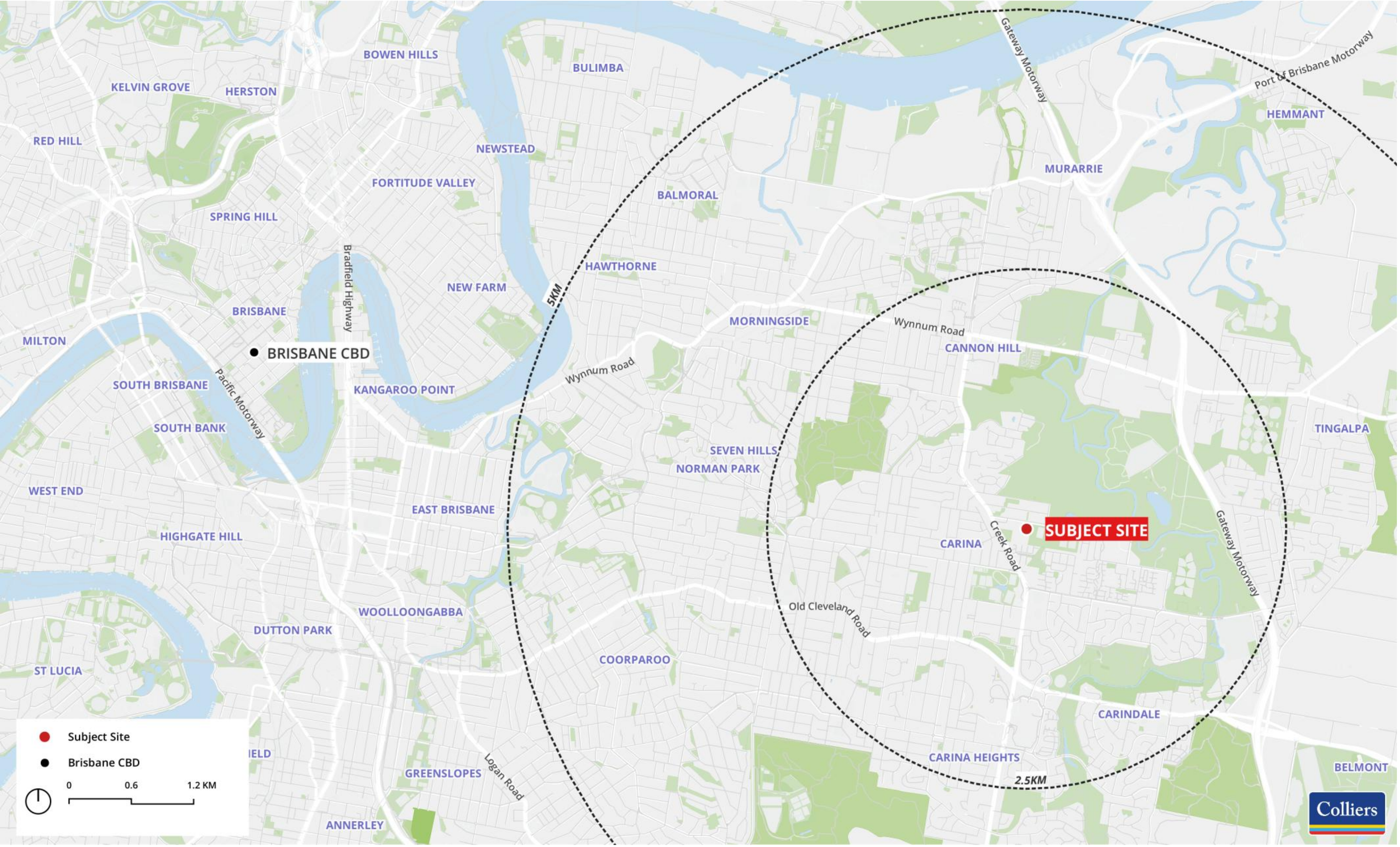


Figure 1.2 Regional Context

Source: Colliers Urban Planning

1.2 Proposed Development

The proposal is for a childcare centre and an adjoining residential component, as follows:

- The childcare centre is proposed to include six activity rooms over two levels, with capacity for 88 places. Four rooms together with outdoor play space are to be provided on the first floor, while two rooms and under croft car parking are to be provided at ground level.
- Residential dwellings are to surround the childcare centre, providing a total of 72 Built-to-Rent (BTR) dwellings. The BTR model focuses on providing dedicated rental housing that is held in a single ownership structure, and professionally managed and operated.

Traffic access to the proposed childcare centre is to be provided from Fursden Road to the north.

A site plan for the childcare centre is provided as **Figure 1.3**.

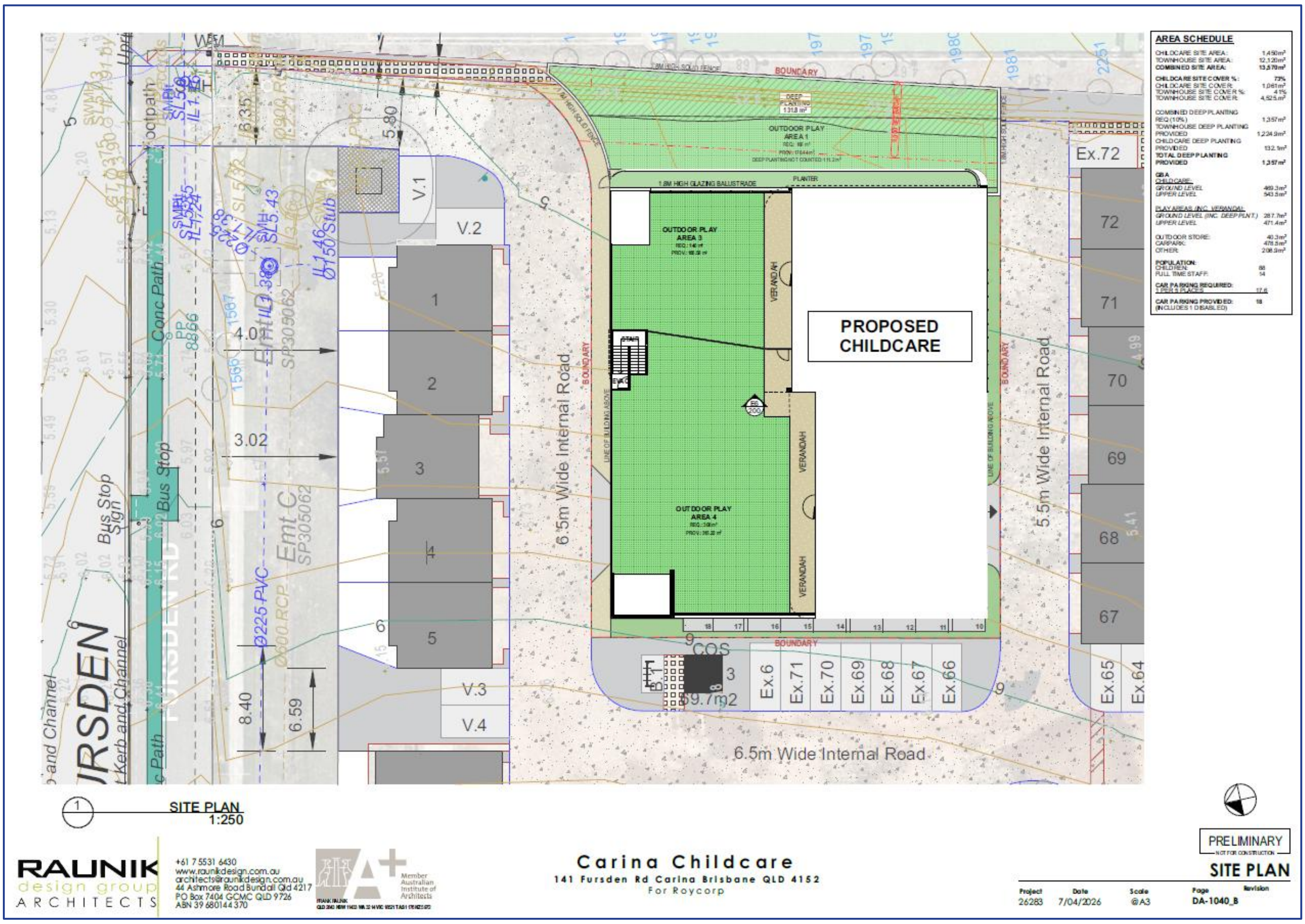


Figure 1.3 Childcare Centre Site Plan

Source: Roycorp Pty Ltd

1.3 Planning Overview

The Brisbane City Council planning scheme is the Brisbane City Plan 2014, Version 35, which become effective on 5 December 2025.

The Subject Site is located within the **Community Facilities zone** referenced for CF7 Health Care Purposes. This zone extends east and west of the Subject Site to the south of Fursden Road, encompassing sporting facilities to the east, and a residential aged care facility and a church to the west.

The purpose of the Community Facilities zone code is to provide for community related activities and facilities whether under public or private ownership. These may include the provision of municipal services, public utilities, government installations, hospitals, educational establishments, transport and telecommunication networks, and community infrastructure of an artistic, social or cultural nature.

The Community Facilities Zone Code (6.2.6.1) includes the following:

4. Development location and uses overall outcomes are:

a) Development provides for the continued use of the land for community facilities identified as appropriate for the particular Community facilities zone precinct.

b) Development enables community facilities to play a key role in developing and maintaining community networks, services and community health and wellbeing and contributes to the city being well served with community buildings, facilities, spaces and activities meeting the diversity of community needs.

c) Development provides for both privately owned community facilities and community facilities that are owned or operated by federal, state or local government.

d) Development ensures that where a use within a Community facilities zone precinct ceases and is no longer fulfilling the intended purpose of the relevant zone precinct, that it is replaced with another community facility.

e) Development that limits the ongoing operation and expansion of an existing community facility or prejudices the establishment of a new community facility appropriate to the relevant zone precinct is not accommodated.

f) Development in a particular zone precinct is predominantly for community facilities that are envisaged in that zone precinct, unless an appropriate adaptation of the premises for another community facility use can be demonstrated.

g) Development improves the use of existing community facilities infrastructure to ensure accessibility and multiple uses.

h) Development for a use not anticipated in the relevant zone precinct may be accommodated where it is demonstrated that the proposal is safe, well designed, integrated with the surrounding area and offers compensatory community benefits.

i) Development:

i. is appropriately located according to the type of proposed use;

ii. is highly accessible and preferably integrated and co-located with complementary uses where possible;

iii. is of a scale, height and bulk that provides a high level of amenity;

iv. is generally consistent with the character of the area;

v. transitions sensitively to surrounding uses.

j) Development is supported by complementary uses of an appropriate scale and purpose which directly serve the employees and activities of the relevant zone precinct and do not compromise the commercial, retail or community service role and function of nearby centre activities.

The Subject Site is located within the **River Gateway Neighbourhood Plan.** The purpose of the River Gateway Neighbourhood Plan Code (7.2.18.3.2) includes the following:

3. The overall outcomes for the neighbourhood plan area are:

a) The River gateway area is developed as a distinct, mixed use area, supporting additional housing opportunities, improved connectivity and additional local shops, cafes, services and facilities, as well as small- to medium-scale commercial and industrial development.

b) Development is of scale and form that protects nearby residents and respects the interface of adjoining areas by carefully managing transitions.

c) Development does not constrain the ability of existing development to operate.

d) Development protects and enhances the long-term viability of environmentally significant areas, regional ecosystems, fauna habitat and movement corridors. The Seven Hills Bushland Reserve and Minnippi Parklands continue to provide a range of sustainable open space and recreational opportunities.

e) Development is of a height, scale and form which is consistent with the amenity and character, community expectations and infrastructure assumptions intended for the relevant precinct, sub-precinct or site and is only developed at a greater height, scale and form where there is both a community need and an economic need for the development.

2.0 Catchment Area Analysis

A review of the catchment area expected to be served by the proposed childcare centre is provided in this Chapter, including an assessment of population forecasts and demographic characteristics.

2.1 Catchment Area Definition

A catchment area describes the geographic region within which a facility is likely to capture a significant share of its patronage. The extent of a catchment area for any facility is shaped by several factors including:

- The relative attraction of the facility in question compared with alternative facilities.
- The location, scale and quality of competing facilities in the surrounding region.
- The available road network and public transport service and how they operate to affect ease of use and access to the facility in question.
- Location and significance of employment areas and the journey to work patterns of workers.
- Significant physical barriers which can act to delineate the boundaries of a catchment area.

The extent of the Catchment Area defined for a future childcare centre at the Subject Site reflects the following key factors:

- The location and accessibility of the Subject Site, which fronts Fursden Road a short distance east of Creek Road, a key traffic route in the area.
- The planned scale of the childcare centre, which is to include 88 places.
- The location and scale of existing and proposed childcare facilities in the surrounding area.
- The existing road network in the surrounding area.

The **Catchment Area** defined for the proposed childcare centre covers the local area, extending approximately 2.5km (an approximate 5 - 6-minute drivetime) from the Subject Site. It extends to Wynnum Road in the north, Minnippi Parklands and Scrub Road to the east, Benenda Terrace to the south, and Raven Street/ Ferguson Road to the west.

The defined Catchment Area and the location of childcare centres in the surrounding region is shown on **Figure 2.1.**

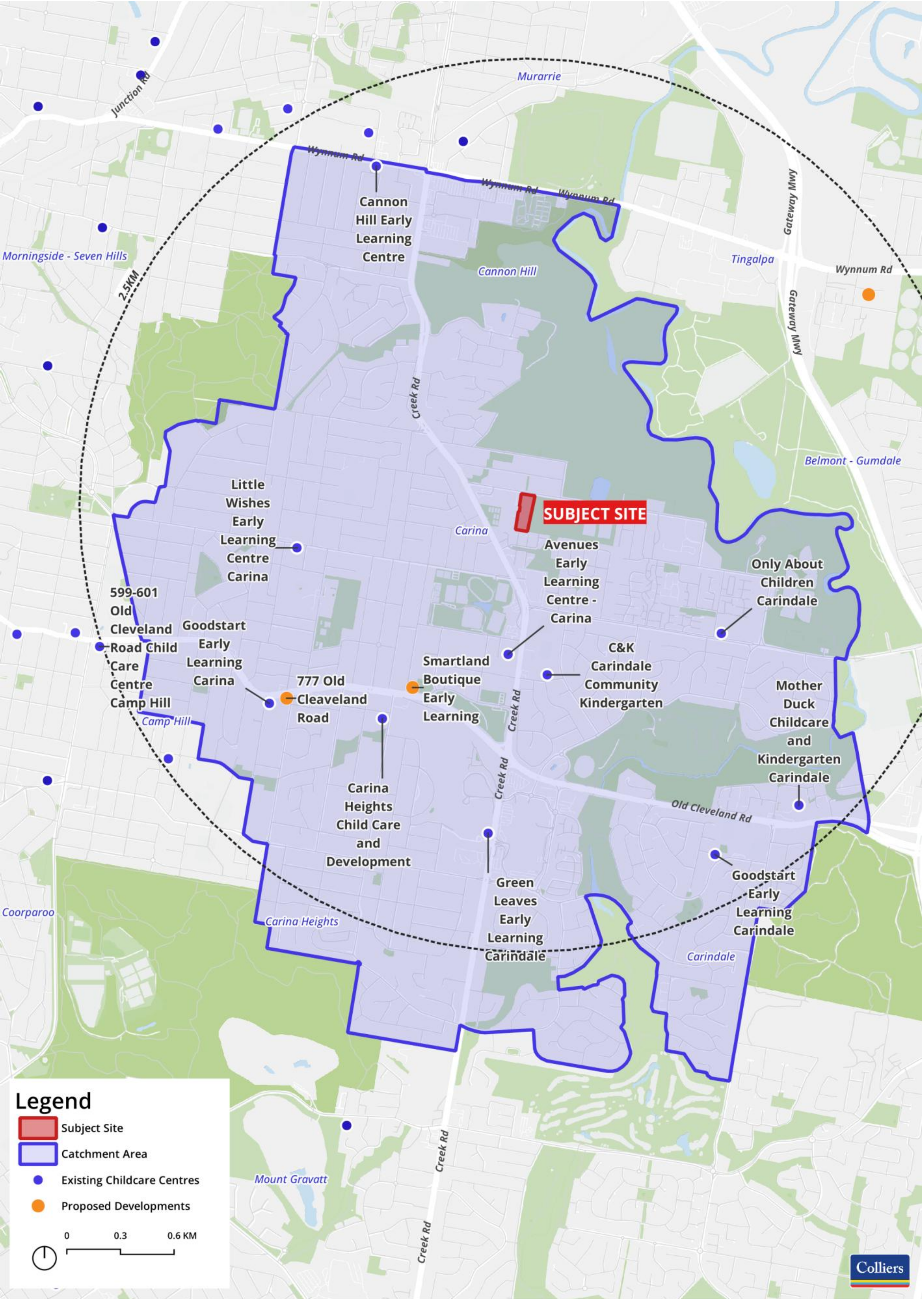


Figure 2.1 Catchment Area and Location of Childcare Centres

Source: ACECQA; Cordell Connect; Colliers Urban Planning

2.2 Catchment Area Population

The population of the Catchment Area is estimated to have increased from 32,980 residents in 2021 to 35,210 residents 2026, reflecting average growth of +450 residents per annum or a growth rate of +1.3% per annum.

Continued population growth is projected in the Catchment Area for the period to 2041, with an average growth of +170 residents per annum reflecting a growth rate of +0.9% per annum. The population of the Catchment Area is forecast to increase by a total of +2,490 residents over the forecast period, to reach 37,700 persons by 2041, refer **Table 2.1**.

This represents a significant slowing in population growth from recent actual levels, and the future population in the Catchment Area may be higher than indicated if additional housing supply is delivered, such as through the approval and development of the adjacent 72 BTR dwellings.

Historical population levels for the Catchment Area have been estimated by using ABS Estimated Resident Population (ERP) data, the latest being for 2025 released in April 2026, which is considered the most accurate and up-to-date population data available in Australia. Population projections are based on data published by the ABS, population projections prepared by the Queensland Government, as well as other research undertaken by this office.

Table 2.1 Catchment Area Population Estimates and Projections, 2021-2041

Population (no.)	2021	2026	2029	2031	2036	2041	2021 - 2026	2026 - 2041
Population	32,980	35,210	35,680	36,000	36,800	37,700	+2,230	+2,490
Average Annual Growth (no.)		+450	+160	+160	+160	+180	+450	+170
Average Annual Growth Rate (%)		1.3%	0.4%	0.4%	0.4%	0.5%	1.3%	0.5%

Source: ABS: Queensland Government Population Projections; Colliers Urban Planning

2.3 Socio-Demographic Characteristics

Socio-demographic characteristics of a Catchment Area population are an important factor to consider for the analysis of childcare need for the community.

The socio-demographic profile of the Catchment Area population, as sourced from the 2021 ABS Census of Population and Housing, is compared with Greater Brisbane in **Table 2.2**. The key points drawn from the data are as follows:

Income

Higher incomes

Residents in the Catchment Area earn +18.8% higher incomes on a per capita basis, and +15.1% on a per household basis, compared with the Greater Brisbane benchmark.

Age Profile

Older age profile but with a higher proportion of young children

The median age of the Catchment Area is 38.2 years, which is slightly older than the average across Greater Brisbane (36.8 years). The share of 0-4 year olds in the Catchment Area is 6.2% of the population, slightly higher compared with 6.0% across Greater Brisbane.

Household Composition

Similar share of family with children households

The proportion of couple families with children (32.4%) is generally consistent with the Greater Brisbane average (32.2%).

Dwelling Structure

Less separate houses

Separate houses account for 65.9% of dwellings in the Catchment Area, which is lower than the proportion across Greater Brisbane (73.7%). The average household size is slightly lower at 2.5 persons per dwelling in the Catchment Area, compared with 2.6 persons for Greater Brisbane.

Dwelling Tenure

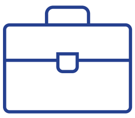
Higher share of dwellings which are owned

A higher proportion of dwellings are owned outright or owned with a mortgage (67.9%) in the Catchment Area compared with Greater Brisbane (63.3%). A smaller proportion of dwellings are rented in the Catchment Area (30.9%), compared to Greater Brisbane (35.3%).

Housing Costs

Higher housing costs

Median mortgage repayments are +14.8% higher than the Greater Brisbane average, at $2,172 per month. Median weekly rents, at $444 per week, are also higher (+14.2%) than the Greater Brisbane average.



Labour Force

Higher participation rate

The Labour Force participation rate in the Catchment Area is 68.4%, +3.9% higher than Greater Brisbane. The Catchment Area has a higher share of residents employed full time and part time (87.6%) compared with Greater Brisbane (85.9%). An estimated 80.1% of residents are employed in white collar jobs, higher than for Greater Brisbane (72.0%).

The Catchment Area is characterised by a typical proportion of family households with children, earning higher income levels and with higher levels of home ownership. The labour force participation rate is above average in the Catchment Area, and residents are more likely employed in white-collar jobs.

Table 2.2 Socio-Economic Profile of Catchment Area Population, 2021

Category	Catchment Area	*Greater Brisbane*
Income		
Median individual income (annual)	$52,080	*$43,840*
Variation from Greater Brisbane median	*+18.8%*	*n.a.*
Median household income (annual)	$111,890	*$97,180*
Variation from Greater Brisbane median	*+15.1%*	*n.a.*
Age Structure		
0-4 years	6.2%	*6.0%*
5-19 years	17.2%	*19.4%*
20-34 years	21.1%	*21.7%*
35-64 years	39.1%	*38.1%*
65-84 years	14.1%	*13.1%*
85 years and over	2.3%	*1.7%*
Median Age (years)	38.2	*36.8*
Country of Birth		
Australia	75.2%	*73.0%*
Other Major English Speaking Countries	10.2%	*11.2%*
Other Overseas Born	14.6%	*15.8%*
% speak English only at home	*82.8%*	*82.0%*
Household Composition		
Couple family with no children	26.7%	*26.4%*
Couple family with children	32.4%	*32.2%*
Couple family - Total	59.1%	*58.6%*
One parent family	10.9%	*11.9%*
Other families	1.4%	*1.2%*
Family households - Total	71.4%	*71.7%*
Lone person household	24.0%	*23.7%*
Group household	4.6%	*4.6%*
Dwelling Structure (Occupied Private Dwellings)		
Separate house	65.9%	*73.7%*
Semi-detached, row or terrace house, townhouse etc.	24.6%	*11.3%*
Flat, unit or apartment	8.5%	*14.6%*
Occupancy rate	*95.3%*	*93.3%*
Average household size	2.5	*2.6*
Tenure Type (Occupied Private Dwellings)		
Owned outright	30.6%	*26.4%*
Owned with a mortgage	37.3%	*36.9%*
Rented	30.9%	*35.3%*
Other tenure type	1.3%	*1.3%*
Housing Costs		
Median monthly mortgage repayment	$2,172	*$1,893*
Variation from Greater Brisbane median	*+14.8%*	*n.a.*
Median weekly rents	$444	*$389*
Variation from Greater Brisbane median	*+14.2%*	*n.a.*
Median rent as a share of median household income	20.7%	*20.8%*
Labour Force		
Employed full-time	59.3%	56.7%
Employed part-time	28.3%	29.2%
Participation rate	68.4%	64.5%

Note: Interpretation of small area data from the 2021 ABS Census should consider potential outcomes from the COVID-19 pandemic.
Source: ABS Census 2021; Colliers Urban Planning

3.0 Childcare in Australia

This Chapter provides an overview of the childcare sector in Australia and particularly Queensland.

3.1 Childcare Overview

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

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

The Report on Government Services 2025 - Child Care, Education and Training was prepared by the Productivity Commission on behalf of the Steering Committee for the Review of Government Service Provision. Some key findings outlined in the report include the following:

- Total government real recurrent and capital expenditure on Early Childhood Education and Care services was $18.2 billion in 2023-24, an increase of 17.4% from 2022-23
- Over the last ten years the number of children attending approved childcare services has grown significantly. The attendance rate at childcare services that are approved by the Australian Government for financial support to eligible families for children aged 0–5 years was 50.4% in 2024, up from 42.0% in 2015.
- The Australian Government childcare subsidy has significantly reduced out-of-pocket costs for families, particularly at the lower income levels.

Childcare in Australia takes on a myriad of forms. While many families take advantage of formal care, grandparents and family networks also play a significant role in assisting with informal childcare. There are various types of formal childcare services catering to varied needs and demands of parents. Some of the key types are described briefly as follows:

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

3.2 Childcare Participation and Attendance Rates

Given the ongoing increases in childcare funding implemented by the Federal Government over recent years, together with the increasing participation of females in the workforce, childcare participation rates continue to increase.

Long Day Care Participation Rate

The long day care participation rate can be calculated by comparing the total number of children in long day care compared with the total population of children aged 5 and under.

The Queensland Government collects data on childcare services through the Queensland Early Childhood Education and Care Services (ECEC) Census. The annual data collection from the early childhood education and care sector occurs during early August of each year. The latest survey was undertaken in period from 28 July 2025 to 3 August 2025.

At 2025, a total of 183,349 children were enrolled in long day care at childcare centres in Queensland according to the ECEC Census, refer **Table 3.1**.

Total enrolments have increased by around 4,300 children since 2020. Of all enrolled children in 2025, 91.4% were aged 4 years and younger, with 8.6% aged 5 years (before starting school). It is noted that the figures in 2021 may have been impacted by the COVID-19 pandemic.

Table 3.1 Queensland Centre Based Care - Long Day Care Enrolments

	2021	2022	2023	2024	2025
0-2 Years	73,446	76,190	80,239	78,335	73,097
3-4 Years	85,683	88,064	89,893	93,417	94,489
Total 4 years and under	**159,129**	**164,254**	**170,132**	**171,752**	**167,586**
5+ Years	19,935	18,124	18,129	15,720	15,763
Total	**179,064**	**182,378**	**188,261**	**187,472**	**183,349**

* Includes limited hours care and occasional care services

Source: Early Childhood Education and Care (ECEC) Services Census; Colliers Urban Planning

The childcare participation rate for Queensland can be calculated by comparing the total number of children aged 4 years and younger enrolled in childcare centres in Queensland with the total population of children aged 4 years and younger in Queensland. At June 2025, the estimated number of children aged 4 years and under in Queensland was 309,320, according to data published by the ABS.

The long day care participation rate in 2025 is calculated at 54.2% for children aged 4 years and under in Queensland based on this analysis. The participation rate in Queensland has generally been increasing over recent years, and was 48.6% in 2020, although declined slightly from 55.6% in 2024.

It is noted that the ECEC Census data set includes children who utilise limited hours care or occasional care services, although the numbers are low for children aged under 5 years. The data is based upon enrolments and not children in care, which could result in a potential overstatement of the participation rate as a small number of children may be enrolled in more than one centre at the time of the ECEC Census.

Average Weekly Attendance at Centre Based Care

The Australian Government Department of Education publishes the *Child Care Subsidy r*eport each quarter. The latest report finds that during the June quarter 2025, the average weekly hours for children in centre-based day care was 34 hours, with Queensland children in centre-based day care averaging a higher 37 hours per week. This reflects an average attendance of three to four days per week.

The average number of hours per week for children in centre-based care has been increasing over recent years, and was 30 hours per week in 2019.

4.0 Supply of Childcare Centres

This Chapter reviews the existing and approved future supply of childcare centres providing long day care (LDC) in the surrounding region.

4.1 Existing Childcare Centres

A summary of the existing childcare centres within the Catchment Area is provided in **Table 4.1**, with the previous **Figure 2.1** illustrating the locations of the childcare centres relative to the Subject Site.

Table 4.1 Existing Childcare Centres in Catchment Area (Long Day Care)

Childcare Centre	Address	Approved LDC Places
Carina		
Only About Children Carindale	1 Epala Street	75
Avenues Early Learning Centre - Carina	93 Zahel Street	135
Little Wishes Early Learning Centre Carina	199-205 Stanley Rd	119
Subtotal		***329***
Carindale		
Goodstart Early Learning Carindale	86 Bridgnorth Street	57
Mother Duck Childcare and Kindergarten Carindale	40 Scrub Road	98
C&K Carindale Community Kindergarten	24 Cuthred Street	66
Subtotal		***221***
Carina Heights		
Goodstart Early Learning Carina	761 Old Cleveland Road	52
Carina Heights Child Care and Development	35 Gallipoli Road	75
Green Leaves Early Learning Carindale	1190 Creek Road	172
Subtotal		***299***
Cannon Hill		
Cannon Hill Early Learning Centre	1025 Wynnum Road	82
Total Existing		**931**

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

A total 10 childcare centres are located in the Catchment Area, offering a total of 931 long day care (LDC) places. Within the Catchment Area, three childcare centres are situated in each of the suburbs of Carina, Carindale and Carinda Heights, with one in Cannon Hill. The childcare centres range in capacity from 52 places to 172 places.

The closest childcare centres to the Subject Site are as follows:

- Avenues Early Learning Centre Carina is located approximately 1.4km, or a 3-minute drive south of the Subject Site, at 93 Zahel Street. It offers 135 LDC places with on-site car parking accessible from Zahel Street off Creek Road.
- Only About Children Carindale offers 75 LDC places. Located off Meadowlands Road, the centre is 1.8km south-east from the Subject Site.
- Carina Heights Child Care Development is located approximately 1.4km south-west of the Subject Site. On-site parking is located on Gallipoli Road, directly off Old Cleveland Road.

In addition to the above, several childcare centres are located immediately beyond the Catchment Area including three additional centres in Cannon Hill, four centres in Camp Hill, and one centre in Mount Gravatt East and Murarrie.

4.2 Future Childcare Centres

One childcare centre is under-construction and one centre has received development approval within the Catchment Area, as summarised in **Table 4.2**, and discussed as follows:

- Smartland Boutique Early Learning is a 104-place childcare centre under construction at 960 Old Cleveland Road, located south-west of the Subject Site. The centre will consist of six activity rooms, and be accessible from Adelaide Road.
- A site at 777 Old Cleveland Road, Carina received development approval in 2022 for a 111-place childcare centre, the child care centre remains undeveloped and the site has since been sold in December 2025.

A number of childcare centres were approved in the area although are no longer proceeding, as follows:

- A childcare centre received development approval for a site at 918-924 Wynnum Road, Cannon Hill. The site has since been sold by Explorers Early Learning to the State of Queensland and is expected to be developed for residential housing.
- The Clara Tower Love Sunshine Building at 49-51 Ludwick Street & 1882-1884 received development for a medical centre and office space in 2022. Level 5 was approved for a 114-place childcare centre, however, the childcare centre component no longer forms part of the approval.

Table 4.2 Approved Childcare Centres Within Surrounding Area (Long Day Care)

Childcare Centre	Address	Status	Approved LDC Places
Within Catchment Area			
Smartland Boutique Early Learning	960 Old Cleveland Road, Carina	Opening Q2 2026	104
Childcare Centre	777 Old Cleaveland Road, Carina	Sold, Development Approval	111
Beyond Catchment Area			
Childcare Centre	1489 Wynnum Road, Tingalpa	Sold, Development Approval	83

Source: Colliers Urban Planning

4.3 Occupancy Rates

The notional occupancy rates for long day care centres can be estimated by comparing the number of children enrolled at childcare centre compared with the number of childcare places provided in an area. The analysis of occupancy rates is only indicative as there will be inflow and outflow of childcare enrolments in an area given people will often travel outside the local area to choose their preferred childcare centre due to a range of factors. However, the analysis does provide a general indication of the occupancy level in a specific broad area.

The Queensland Early Childhood Education and Care Services (ECEC) Census provides data on the number of enrolments at childcare centres across Queensland. The data is available at the ABS Statistical Area 2 (SA2) level, which generally covers one or two suburbs. It is noted that there are some limitations to the ECEC Census data, particularly as it relates to only one week of the year, and relies on childcare centres providing accurate information.

The Catchment Area used in this report does not align with SA2 boundaries and extends across parts of five SA2s, including the following:

- Carina
- Carina Heights
- Camp Hill
- Carindale
- Cannon Hill

The total number of reported long day care (LDC), limited hours care (LHC) and occasional care (OC) enrolments as sourced from the Queensland childcare census in each SA2 from 2021 to 2025 is shown in **Table 4.3**. The current number of long day care places provided in each SA2 is also detailed.

Using the data from the ECEC Census, compared with the number of long day care places in each area, the notional occupancy rates for each SA2 can be estimated. For the calculation it is assumed that children attending formal childcare attend on average three and a half days a week, based on the average weekly hours for centre-based care as published by the Australian Government Department of Education (refer Chapter 3).

We note this analysis can be considered indicative only given the nature of the data and the assumptions adopted.

Comparing the total enrolments, adjusted for average attendance, with the provision of long day care places reveals a notional occupancy rate of 80% across the five SA2s which encompass the defined Catchment Area. This is considered a strong rate of occupancy for the region.

It is important to note that given children typically attend childcare on average 3.5 days a week on various days, it is unlikely that childcare centres are ever at full capacity every day. As a general guide, an occupancy rate of around 70% or higher is considered a commercially healthy for childcare centres. An occupancy rate of this order ensures existing centres can operate viably, make a profit and provide a quality service.

It is also important to ensure that an appropriate level of competition and choice is available, and thus a high occupancy level can potentially be an indication of more limited consumer choice. Parents should have access to a wide choice of location and type of centre for the care of their children given the high level of Government funding in the childcare industry. If occupancy levels of childcare centres in an area are too high, the choice of care for parents can be limited. When the occupancy rate exceeds around 75%, supply constraints can result which may impact on choice, particularly for families with multiple children.

Table 4.3 Catchment Area SA2s – ECEC Enrolments 2021 - 2025 and Current Long Day Care Places

Statistical Area 2*	2021	2022	2023	2024	2025	Current LDC places	Est. Occupancy rate
Long Day Care / LHC / OC	1,943	1,915	1,764	2,021	1,916		
Based on 3.5 days a week per child	1,361	1,340	1,235	1,415	1,340	1,677	80%

* Includes SA2s of Carina, Carina Heights, Camp Hill, Carindale, Cannon Hill.
Source: Queensland ECEC Census; Australian Children's Education & Care Quality Authority; Colliers Urban Planning

5.0 Childcare Demand, Benefit and Impact Analysis

This Chapter presents an assessment of the demand for long day care places generated from the resident population within the defined Catchment Area. It also reviews the economic benefits and potential impacts of developing the proposed childcare centre at the Subject Site.

5.1 Childcare Demand Analysis

The following analysis is used to determine the likely demand for long day care places in the Catchment Area given the number and age profile of the resident population. It is noted that people will use childcare centres outside the defined Catchment Area, and also people living in the broader region would use childcare centres within the area. The following analysis is to provide a general indication of the potential number of long day care places that can be supported in the Catchment Area based on a range of assumptions.

The demand analysis for long day care childcare facilities in the Catchment Area is provided in **Table 5.1**, based on the following methodology:

- Determine the population of the catchment (refer Chapter 2) and estimate the number of children aged 0-4 years over the forecast period to 2031. At the time of the 2021 ABS Census, the proportion of children aged 0-4 years in the Catchment Area was 6.2%, and this proportion is assumed to remain constant over the forecast period.
- Apply an estimated participation rate for children seeking long care day. As outlined in Chapter 3, the childcare participation rate for Greater Brisbane is estimated at 54.2% in 2025, based on Queensland ECEC Census. The participation rate applied in the following analysis is 58% at 2029, with the higher rate reflecting the ongoing increases in Government funding for the sector.
- Apply an attendance rate of 70% (i.e. an average attendance of 3.5 days a week), which is based on the average weekly hours per child in centre-based care as reported in the Child Care in Australia report June quarter 2025, as published by the Department of Education.
- Make an allowance for children aged 5 years before they attend school. Data from the QLD ECEC Census indicates that children aged 5 years accounted for around 8.6% of the total number of children enrolled in centre-based care in 2025, with 8% adopted in the following analysis.

Based on this analysis, the estimated demand for childcare places in the Catchment Area is estimated at 980 places at 2029. The 10 childcare centres in the Catchment Area provide a total of 931 long day care places. Two childcare centres are under construction or approved within the Catchment Area, to provide a total of an additional 215 places. Including a childcare centre with 88 places at the Subject Site, a total of 1,234 long day care places would be provided in the Catchment Area assuming all centres are developed.

It is important to note that it is unlikely that childcare centres are ever at full capacity every day. As outlined previously it is generally accepted that an occupancy rate of 70% represents a reasonable balance of ensuring adequate choice and competition in an area, though also ensuring existing centres can operate viably, make a profit and provide a quality service.

A high occupancy rate in an area can substantially restrict choice for residents, particularly for specific age groups where availability of days may differ. It is imperative that occupancy rates are not too high, otherwise choice of centre would diminish significantly, particularly for families with multiple children requiring care across different days. This is particularly important for areas which include childcare centres that provide care that is focused on a particular segment of the population, such as centres operated by religious institutions.

Comparing the estimated demand for childcare places in the Catchment Area with the future supply, inclusive of approved childcare centres as well as the subject proposal, results in an estimated average occupancy rate of 79% in 2029.

This analysis demonstrates that sufficient demand exists for proposal, based on the available market and the future supply of childcare places in the area. The occupancy rate for the Catchment Area, inclusive of the subject proposal, is estimated to be at the upper end of the acceptable range.

Long day care centres achieve profitability across a range, with the targeted occupancy rate of between 70% and 80% representing a reasonable balance between providing choice and competition in the catchment area while also allowing centres to operate viably, meet quality standards and operate successfully.

Overall, comparing the estimated need with the existing/future supply of centre-based childcare places in Catchment Area demonstrates that sufficient demand exists for the proposed childcare centre with 88 places at the Subject Site.

Table 5.1 Long Day Care Childcare Demand Analysis – Catchment Area 2029

Item	2029
Catchment Area population	35,680
Est. children aged 0-4 years (at 6.2% of total)	2,220
Participation rate 58%	
Est. demand for childcare places (0-4 years)	1,290
Apply typical attendance rate of 70% (3.5 days a week)	
Est. average daily demand (0-4 years)	900
Est. demand for children aged 5 years (8% of total)	80
Est. average daily demand (children 0-5 years)	**980**
Existing centre-based childcare places	**931**
Approved places	215
Subject development	88
Existing, approved places and subject development	**1,234**
Estimated occupancy rate with subject development	**79%**

Source: ABS; Queensland ECEC Census; Child Care Subsidy Data; Colliers Urban Planning

5.2 Benefit Considerations

In terms the potential community benefits that are expected to arise from the development of a childcare centre at the Subject Site, the following points are noted:

- **Support female workforce participation.** A key obstacle for females returning to the workforce is access to affordable childcare, as previously stated by the Federal Government. Therefore, it is imperative to provide a range of childcare options to ensure females that wish to return to the workforce can easily access childcare facilities in the local area. The proposed childcare centre would contribute to supporting females in the local community return to the workforce by provided an additional option of formal childcare.
- **Cater to the growing childcare needs of the Catchment Area.** The population of the Catchment Area is projected to increase by 2,500 residents over the forecast period to 2041. Together with this population growth, any increase in childcare participation and attendance rates will increase the demand for childcare places in the local area.
- **Childcare is an appropriate use for the Subject Site.** The Subject Site is located in an area which provides a range of community and other non-residential uses including a church, aged care facility and sporting fields. A childcare centre is an appropriate use and for site, and would complement the existing uses in the surrounding area.
- **Increase choice and downward pressure on fees**. In any locality it is important to provide a range of childcare options for the community in order to offer a wide choice of facilities and to put downward pressure on fees. Childcare centres offer different services and vary in size. Some childcare centres also cater to particular segments of the population. The proposed childcare centre would add to the choice of childcare centres in the local area.
- **Create local jobs**. The planned childcare centre would provide direct and ongoing employment opportunities for a number of staff at the centre. Based on the requirements of educators per children in Queensland, an 88-place

childcare centre is expected to create approximately 18 - 20 direct ongoing jobs. Furthermore, additional temporary jobs would also be created during the construction phase of the project, in construction and related industries.

5.3 Impact Analysis

In addition to examining the need for the proposed childcare centre, one of the purposes of this report is to consider any potential adverse impacts which may occur due to the proposed development.

It is firstly emphasised that to maintain a healthy childcare sector, as demand for childcare places increases new centres need to be developed to ensure adequate choice for parents. The development of new centres also ensures that existing centres are encouraged to update programs and facilities to meet the expectations and preferences of parents.

Given the level of demand for childcare places in the Catchment Area, compared with future supply of the childcare centres provided in the local area inclusive of the subject proposal, the impact on existing childcare centres in the surrounding area is expected to be minimal. This reflects the following key factors:

- The demand analysis in this report demonstrates sufficient demand for the proposed centre exists given the available market and supply of childcare places. Demand for long day care places in the area, and throughout the nation, is expected to increase in the future. This will be driven in part by the Federal Government providing additional funding for parents accessing formal childcare leading to an increase in the female participation rates in the workforce.
- The potential impacts from the proposed childcare centre on any one centre would be limited as the redistribution of demand would be spread across numerous childcare centres in the surrounding region. The proposed childcare centre would provide around 7% of the total existing and approved long day care places in the Catchment Area.
- Childcare centres in the surrounding area have an occupancy rate which is at the higher end that is generally appropriate for an area. A high-level analysis of the occupancy rates of childcare centres reveals an occupancy rate in the order of 80% for the five SA2s which encompass the Catchment Area.

In summary, the proposed childcare centre at the Subject Site is not expected to have any adverse impact on the ongoing viability of existing childcare centres in the surrounding area and would not delay the development of approved childcare centres in the Catchment Area. This reflects that there is sufficient market need to support the proposed childcare centre in additional to the approved centre in the Catchment Area.

6.0 Residential Need Assessment

This Chapter of the report considers need as relates to the BTR component of the proposed development.

6.1 Description

As noted in Chapter 1, the project also includes a total of 72 Built-to-Rent (BTR) dwellings. These will be located on the balance of the Subject Site to the child care centre, and be delivered in a manner that ensures both the residential and child care uses operate in a complementary manner.

The proposed BTR dwellings include a mix of 2 and 3 storey townhouses, with recreation areas (including pool), landscaping, pathways and other shared infrastructure.

Roycorp propose to retain ownership of the Subject Site and manage rental of the 72 dwellings, all dwellings will remain under a single title.

About the Build to Rent Model

The Built to Rent (BTR) model focuses on providing dedicated rental housing that is held in a single ownership structure, and professionally managed and operated. This is often with a view to serving longer term renters including those otherwise priced out of home ownership. While a relatively new concept to the Australian market, the BTR concept (or sometimes called multi-family) is increasingly popular in international markets including the US and UK, accounting for a significant proportion of the overall rental and housing market.

Within Australia, the recent emergence of the BTR model as a means of driving additional housing supply has been reflected in recognition within public policy responses to the current housing affordability issues. For example, the BTR sector is identified in the Housing Accord between the Commonwealth and the States and Territories as an area of review for *“barriers to institutional investment, finance and innovation in housing”* (Page 4).

Likewise, the Queensland Government has implemented a BTR pilot project working with developers to incorporate discounted rental properties. Further, the Shaping SEQ Regional Plan identifies BTR as a means to unlock housing delivery (Page 53).

6.2 Policy Summary

Detailed town planning issues are dealt with separately in a town planning report prepared for the planning application. Nonetheless, at a high level the following policy considerations are relevant to consideration of residential need.

South East Queensland Regional Plan (Shaping SEQ)

Shaping SEQ identifies a set of Regional Priorities from which specific outcomes and strategies are subsequently derived. These priorities include:

- A sustainable growth pattern: “ShapingSEQ 2023 continues to drive efficient use of land by encouraging growth within existing urban areas, where land is more readily able to be serviced and accessed.” (Page 35)
- More homes faster – supply, diversity and affordability: *“Every SEQ resident should have access to a safe, secure and affordable home that meets their needs and enables participation in the social and economic life of this prosperous state.”*
- More social and affordable homes: *“Increasing the amount of social housing and affordable housing across the region is critical to the future prosperity of SEQ.”*

A specific outcome of Shaping SEQ is the implementation of dwelling supply targets. These targets reflect both the anticipated demand for overall dwelling growth as well as the prioritisation of urban consolidation over expansion, including *“unlocking underutilised land in the Urban Footprint”* (Page 52).

Other

At the current time, the issue of housing supply and affordability is a key public policy consideration across all levels of Government. For example, the Commonwealth Treasurer Jim Chalmers in announcing the National Housing Accord, of which the Queensland Government is a signatory, identified “one of our nation’s biggest economic challenges: the supply and affordability of housing.” (October 2022)

Likewise, the Queensland Government released the Homes for Queenslanders plan in February 2024. This plan identifies a range of initiatives aimed at improving housing access and affordability. One of the five pillars identified in the Plan is “Build more homes, faster”. This includes recognition that “The single best thing we can do for housing affordability is to deliver more supply.” (Page 11).

Further, the City of Brisbane considers initiatives to enhance housing supply and affordability in the “Sustainable Growth Strategy” released in March 2023 and in “Brisbane’s Housing Supply Action Plan” released October 2023.

6.3 Residential Study Area Assessment

A Study Area has been defined to analyse relevant population, demographic and other trends and forecasts of relevance to the residential component of the subject proposal. The Study Area has been defined as the ABS defined Carindale Statistical Area 3 (SA3). The Carina SA2 is provided for context.

The Study Area includes the suburbs of Carina, Carina Heights, Camp Hill, Cannon Hill and Carindale. This Study Area reflects the area where local housing trends, demographics and population growth will have the greatest influence on economic need considerations as they relate to housing.

An overview of the Study Area is provided in Map 4.

Demographic Profile

Key demographic characteristics of the Study Area drawn from the ABS Census of Population and Housing 2021 are shown in **Error! Reference source not found.**, including:

- **Higher median incomes.** Median household incomes in the Study Area ($120,090) are approximately 23.5% higherr than Greater Brisbane ($97,180).
- **Slightly older age profile**. The Study Area’s median age (37.8 years) is slightly older than for Greater Brisbane (36.8 years).
- **Couple families are the predominate household composition.** Some 62% of Study Area households are occupied by couple families, including 35.9% with children, and 26.4% without children. This is in general terms consistent with the Greater Brisbane average.
- **Higher provision of semi-detached houses, and lower provision of units**. Study Area dwellings include a higher share of semi-detached houses (20.1%) compared to Greater Brisbane (11.3%). The share of separate houses (71.3%) and flats, units or apartments (8.1%) is lower than the Greater Brisbane average.
- **Higher provision of dwellings owned outright.** Study Area dwellings are predominately owned with a mortgage (38.9%) or outright (31.2%). The share of rented dwellings at 28.8% is lower than the Greater Brisbane average of 35.3%.
- **More expensive housing costs.** Monthly mortgage repayments are approximately 21.7% higher in the Study Area relative to the Greater Brisbane benchmark. Similarly, weekly rents in the Study Area are also higher (+17.5%) relative to Greater Brisbane.

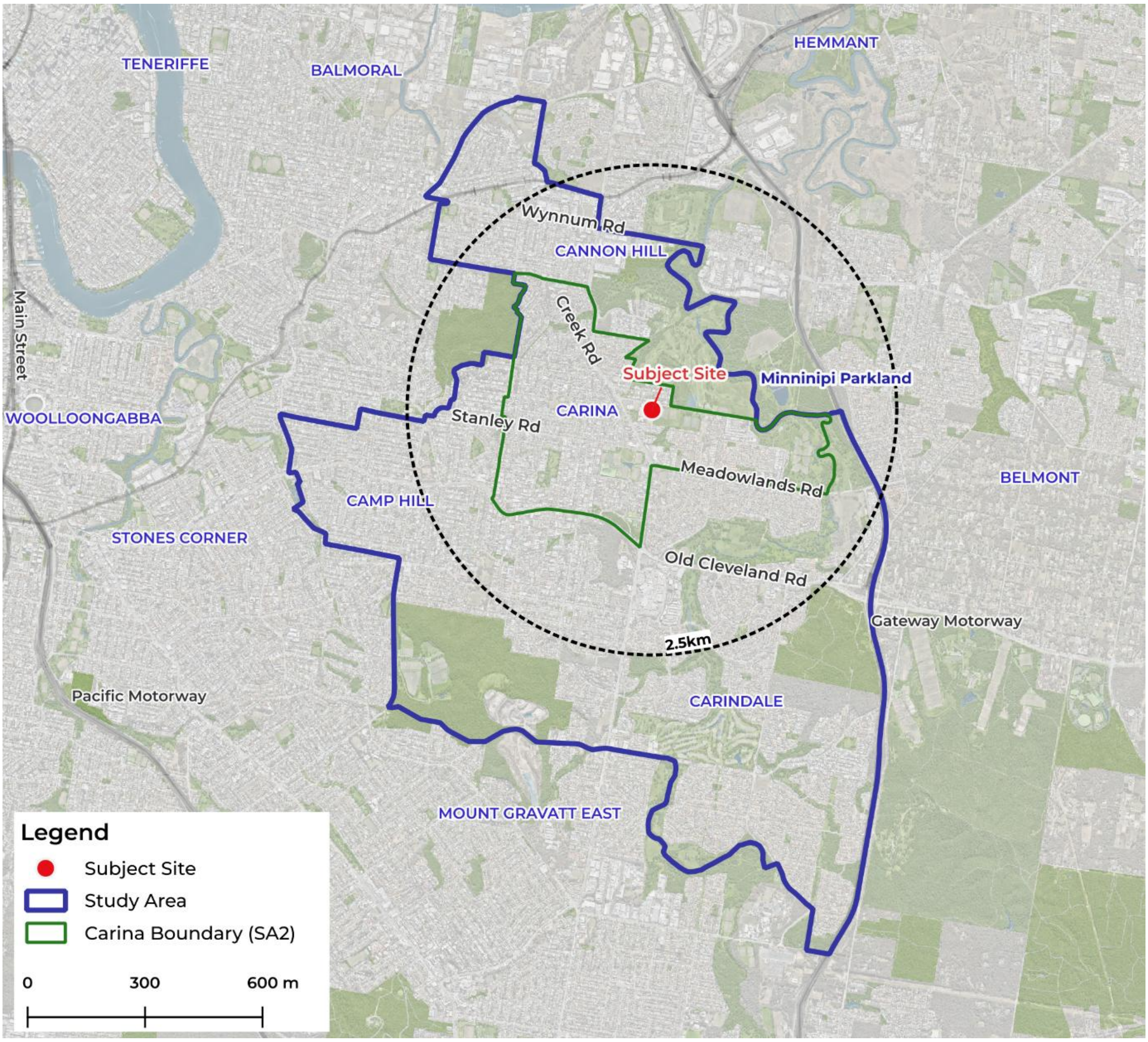


Figure 6.1 Residential Study Area

A review of changes between the 2016 and 2021 ABS Census for the Study Area identifies that:

- Both median household and per capita income levels in the Study Area are increasing faster than the Greater Brisbane average
- The median age increased from 36.0 years to 37.8 years
- The share of family households increased slightly
- The share of separate dwellings declined from 75.8% to 71.3%, with increases for semi-detached dwellings and flats, units & apartments.
- Rented dwellings decreased from 29.5% to 28.8% of total housing stock.

Table 6.1 Study Area Socio-Economics, 2021

Category	Study Area	*Greater Brisbane*
Income		
Median individual income (annual)	$54,470	*$43,840*
Variation from Greater Brisbane median	*+24.2%*	*n.a.*
Median household income (annual)	$120,090	*$97,180*
Variation from Greater Brisbane median	*+23.6%*	*n.a.*
Age Structure		
0-4 years	6.1%	*6.0%*
5-19 years	18.4%	*19.4%*
20-34 years	20.7%	*21.7%*
35-64 years	40.3%	*38.1%*
65-84 years	12.6%	*13.1%*
85 years and over	1.9%	*1.7%*
Median Age (years)	37.8	*36.8*
Country of Birth		
Australia	74.6%	*73.0%*
Other Major English Speaking Countries	10.0%	*11.2%*
Other Overseas Born	15.4%	*15.8%*
% speak English only at home	*81.0%*	*82.0%*
Household Composition		
Couple family with no children	26.4%	*26.4%*
Couple family with children	35.9%	*32.2%*
Couple family - Total	62.3%	*58.6%*
One parent family	9.9%	*11.9%*
Other families	1.3%	*1.2%*
Family households - Total	73.5%	*71.7%*
Lone person household	22.1%	*23.7%*
Group household	4.4%	*4.6%*
Dwelling Structure (Occupied Private Dwellings)		
Separate house	71.3%	*73.7%*
Semi-detached, row or terrace house, townhouse etc.	20.1%	*11.3%*
Flat, unit or apartment	8.1%	*14.6%*
Other dwelling	0.6%	*0.4%*
Occupancy rate	*95.4%*	*93.3%*
Average household size	2.6	*2.6*
Tenure Type (Occupied Private Dwellings)		
Owned outright	31.2%	*26.4%*
Owned with a mortgage	38.9%	*36.9%*
Rented	28.8%	*35.3%*
Other tenure type	1.1%	*1.3%*
Housing Costs		
Median monthly mortgage repayment	$2,303	*$1,893*
Variation from Greater Brisbane median	*+21.7%*	*n.a.*
Median mortgage as a share of median h'hold income	23.0%	*23.4%*
Median weekly rents	$457	*$389*
Variation from Greater Brisbane median	*+17.5%*	*n.a.*
Median rent as a share of median household income	19.8%	*20.8%*

Source: 2021 ABS Census of Population and Housing

Resident Population Change

In 2025, 58,610 residents lived within the Study Area. This represents an increase of +880 persons per annum since 2021, higher than the rate of +530 persons per annum experienced between 2016 and 2021.

Adopting the latest Queensland Government projections prepared in 2023, by 2036 the Study Area is forecast to have 60,780 residents, an increase of +2,170 persons on current levels. By 2046 further population growth to 63,690 persons is forecast reflecting total growth of +5,080 persons between 2025 and 2046.

Table 6.2 Residential Study Area Population Trends and Forecast, 2016 to 2046

	2016	2021	2025	2029	2036	2046	Change 25-46
Population							
Study Area	52,430	55,100	58,610	59,630	60,780	63,690	+5,080
Average Annual Growth							
Study Area		+0.7%	+1.6%	+0.8%	+0.4%	+0.9%	+0.4%
Average Annual Change							
Study Area		+530	+880	+260	+160	+290	+240

Source: ABS and QGSO

Between 2025 and 2046 population growth in the Study Area of +240 persons or +0.4% per annum is forecast for the Study Area. This represents a significantly lower rate of growth than has been recently achieved in the Study Area in recent years (see Table).

This decline in forecast population growth within the Study Area is indicative of a constrained housing supply situation rather than any change in underlying demand to live in the Study Area. This is demonstrated by current and historic rates of population growth which are notably higher than the QGSO forecasts.

Notwithstanding the forecast decline in rates of population growth according to the official projections, population growth is expected on an ongoing basis for the Study Area for the foreseeable future. This reflects a sustained demand for additional housing supply and choice over coming decades, notwithstanding the currently high rates of population growth indicating immediate and short-term demand for housing in the Study Area.

On an indicative basis, the forecast population growth in the Study Area as identified in Table 6.2 implies the need for an additional 2,820 private dwellings by 2046. This adopts the current household size (2.55 persons) in the Study Area with an allowance for a decline in household size to 2.46 persons in 2046 equivalent in percentage terms to the rate of decline in household size for Greater Brisbane over the same period to 2046.

The above is a conservative view of dwelling requirements for the Study Area in the context of recent trends for population growth are notably higher than the QGSO projections.

New Dwelling Approvals

An overview of new dwelling approval trends in the Study Area indicates that between 2017 and 2025, new dwelling approvals in the Study Area averaged 354 per annum. This includes a mix of houses and "Other" dwelling types which the ABS defines as multiple dwellings (units, apartments, townhouses etc).

Over the period Other dwellings (including townhouses as proposed) have accounted for over half of new dwelling approvals in the Study Area, as shown in Figure 6.2.

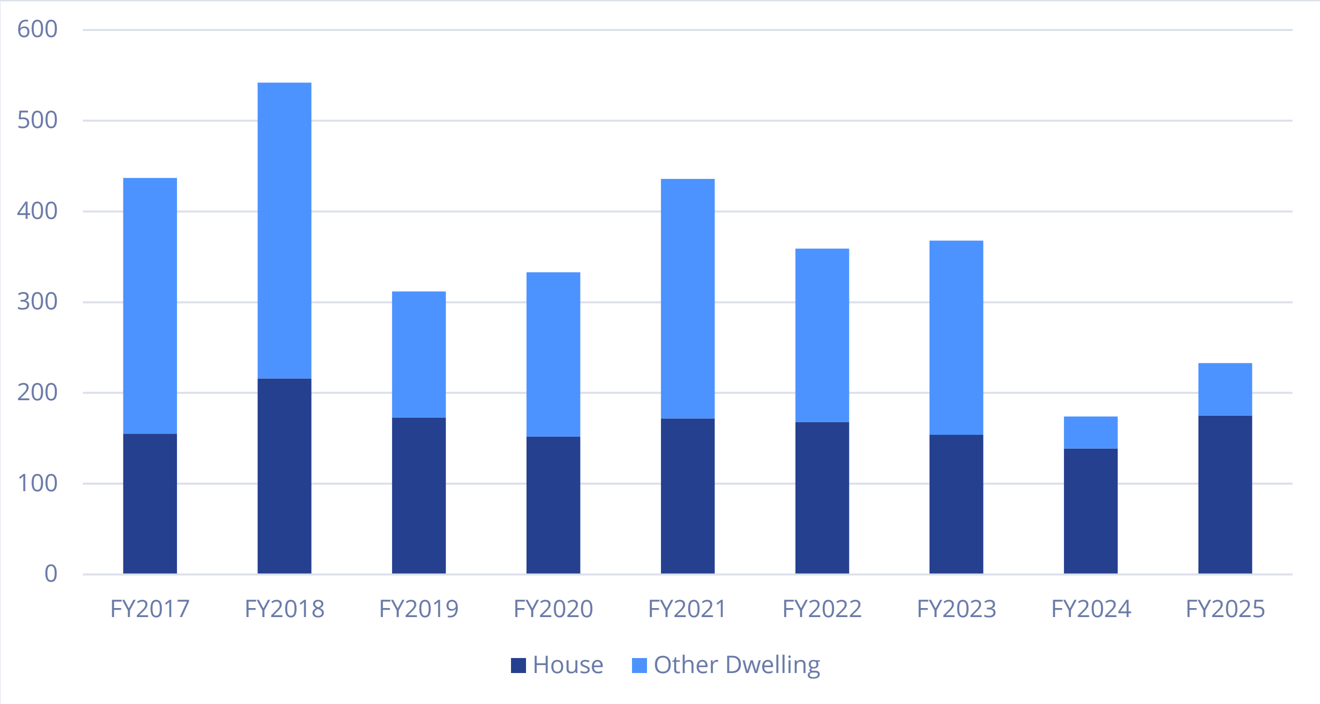


Figure 6.2 New Dwelling Approvals in Study Area, 2017 to 2025 (Year to June)

In the year to June 2024, the number of new dwelling approvals in the Study Area declined to 174, with a modest increase to 228 new approvals in the year to June 2025. This is well down on all other years between 2017 and 2023, and for 2024 is less than half the average of 354 per annum over the period.

The reduction in new dwelling approvals in 2024 and 2025 predominantly includes Other dwellings (i.e. semi-detached dwellings and attached dwellings). This suggests a lack of available new supply for this dwelling type which has otherwise shown strong demand in the Study Area

Further, the reduction in new dwelling approvals in the Study Area in very recent years has occurred simultaneously with a period in which the delivery of additional housing supply is an important public policy objective.

House Price Trends

According to Core Logic, the average home price (across all dwelling types) in Greater Brisbane is now $1.101m making it the second most expensive capital city in Australia in which to buy a home. In recent years, home prices in Brisbane have overtaken those of Melbourne and Canberra.

In 2025, median home prices in the Study Area were $1,363,750. This includes an average price of $1,670,000 for houses in the Study Area (Greater Brisbane average $1,080,000) and $887,250 for units (Greater Brisbane average $750,000).

These local price trends are identified in Figure 6.3 on the next page.

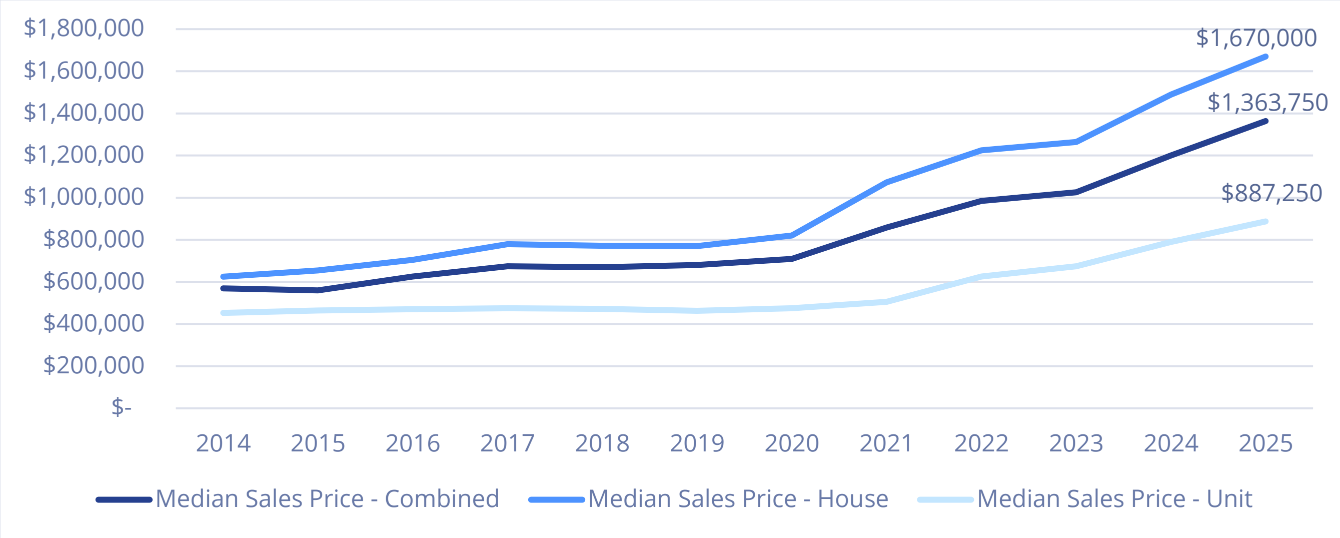


Figure 6.3 New Dwelling Approvals in Study Area, 2017 to 2025 (Year to June)

Source: RP Data

In the past five years, house prices in the Study Area have increased substantially in a manner consistent with wider market trends negatively impacting housing affordability.

Over the past ten years, median house prices in the Study Area have increased by an average of 9.8% per annum. However, in the past five years the rate of home price growth has been 15.3% per annum, this is reflected in Table 6.3.

Table 6.3 Home Price Annualised Increase Comparison, Study Area and Greater Brisbane

	Houses		Units/Apartments	
	2016 to 2025	2020 to 2025	2016 to 2025	2020 to 2025
Study Area	9.8%	15.3%	6.7%	13.3%
Greater Brisbane	7.6%	12.5%	5.1%	10.8%

Source: RPData

Rental Properties

At the current time, the average asking weekly rent is $948 per week for a house in Postcode 4152, which is generally aligned with the Study Area. This is an increase from $800 per week in 2024.

Likewise, the weekly asking rent for units is $746 per week, an increase from $678 per week in 2024.

This rapid growth in rent is also associated with very tight rental market with low levels of vacancy. In March 2026, the rental vacancy rate is just 0.6% which reflects an extremely constrained rental market limiting choice and availability for those seeking rental accommodation, as summarised in Figure 6.3.

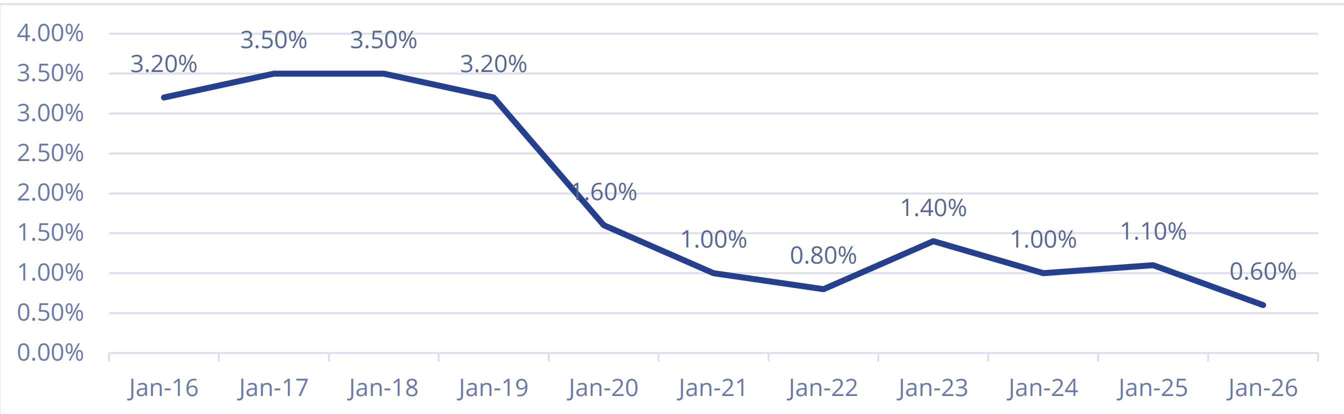


Figure 6.4 Asking Rents in Study Area (Postcode 4152)

Source: SQM

6.4 Housing Need

An economic need for residential housing is met by the proposed development. This is reflected in the following considerations:

1. Delivery of additional housing supply is as a key public policy priority across all levels of Government as a response to strong rates of population growth and housing affordability issues in both Queensland and Australia
2. A need to deliver additional housing supply is reflected in the Shaping SEQ regional plan which identifies a dwelling target for the City of Brisbane equivalent to 8,430 dwellings per annum between 2021 and 2046, noting that annualised new dwelling approvals between 2021 and 2025 in the City is currently below this at 7,630 per annum
3. The Subject Site of 1.376 hectares is flat, cleared, has been vacant for many years and is able to accommodate the subject proposal comprising both a childcare centre and 72 Built-to-Rent townhouses for development in a timely manner
4. The Subject Site is located in an area with a demonstrated demand and popularity for new housing, including townhouses, noting the re-development of the former Goodman Fielder factory (Minnippi Quarter) completed in mid-2022
5. The proposal involves the delivery of Build-to-Rent dwellings which is a housing delivery model relatively new in the Australian context but one which has been identified as a means of facilitating investment that creates additional housing supply
6. The nature of the subject proposal and the location of the Subject Site approximately 7km direct distance east of the CBD and in a high amenity area can be expected to be desirable to a variety of potential tenants, including multi-generational families
7. In the Study Area, strong population growth has occurred in recent years, and this has also been reflected in rapid rates of house price growth, increased rents and extremely low rental vacancy rates which indicate an urgency and immediacy to housing need which can be met by the subject proposal
8. The delivery of additional housing supply and choice at the Subject Site through the subject proposal delivers a community benefit, particularly in the context of current housing market conditions
9. The timely delivery of housing by the subject proposal is a meaningful contribution to the housing supply required by the Study Area over coming years.

7.0 Summary and Conclusion

This Chapter provides a summary of the key findings of the report and an assessment of net community benefit.

An 88-place childcare centre is proposed at 141 Fursden Road, Carina, together with a residential component of 72 BTR dwellings. The Subject Site is conveniently accessible from Creek Road (via Fursden Road), a key north-south traffic throughfare in this part of Brisbane.

Childcare Centre

A Catchment Area has been defined for the proposed childcare centre which reflects its location a short distance east of Creek Road. It extends some 2.5km around the Subject Site, and reflects an approximate 5 - 6-minute drivetime.

The population of the Catchment Area is projected to increase from 35,210 at 2026 to 37,700 at 2041. The socio-demographic profile of the Catchment Area is characterised by a typical proportion of family households with children, earning higher income levels and with higher levels of home ownership. The labour force participation rate is above average in the Catchment Area, and residents are more likely employed in white-collar jobs.

A total 10 childcare centres are located in the Catchment Area, offering a total of 931 long day care places. The distribution of childcare centres includes three situated in each of the suburbs of Carina, Carindale and Carinda Heights, with one in Cannon Hill. One childcare centre is under-construction, and one has received development approval within the Catchment Area. The two centres would provide a total of 215 long day care places.

A review of the key demand factors, compared with the existing and approved supply of the childcare places in the Catchment Area, identifies a need for additional childcare places in the area. In particular, a market needs exists for a childcare centre at the Subject Site.

The proposed childcare centre is assessed to not adversely impact existing childcare centres in the Catchment Area or delay the development of approved childcare centres in area. This primarily reflects that sufficient market exists to support the proposal as well as the existing and approved childcare centres in the Catchment Area.

Overall, the proposed childcare centre at the Subject Site would serve a demonstrated economic and community need for additional childcare places in the Catchment Area. It would cater to the needs of the local population and serve the increasing demand for centre-based childcare places in the area. It would also provide an important community service by supporting female workforce participation as well increasing childcare choice for parents.

Based on the analysis provided in this report, and particularly that the positive economic and community benefits would offset any potential implications to existing childcare facilities, it is concluded that a net community benefit will result from the development of the proposed childcare centre at the Subject Site.

Build-to-Rent Housing

An assessment of the residential Study Area relevant to the Subject Site and proposed delivery of 72 BTR dwellings highlights:

- Strong policy guidance seeking the delivery of additional housing supply
- Historic and forecast population growth in the area which will require delivery of additional housing choice
- Rapid house price growth, increasing rents and extremely low rental vacancy rates are factors indicating the immediate need for additional housing choice which can be met by the proposal.

In this regard, the proposal delivers additional housing choice through the BTR model in an area where a strong need for additional dwellings is apparent.

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