

BELLBOWRIE PLAZA

Marketing Profile

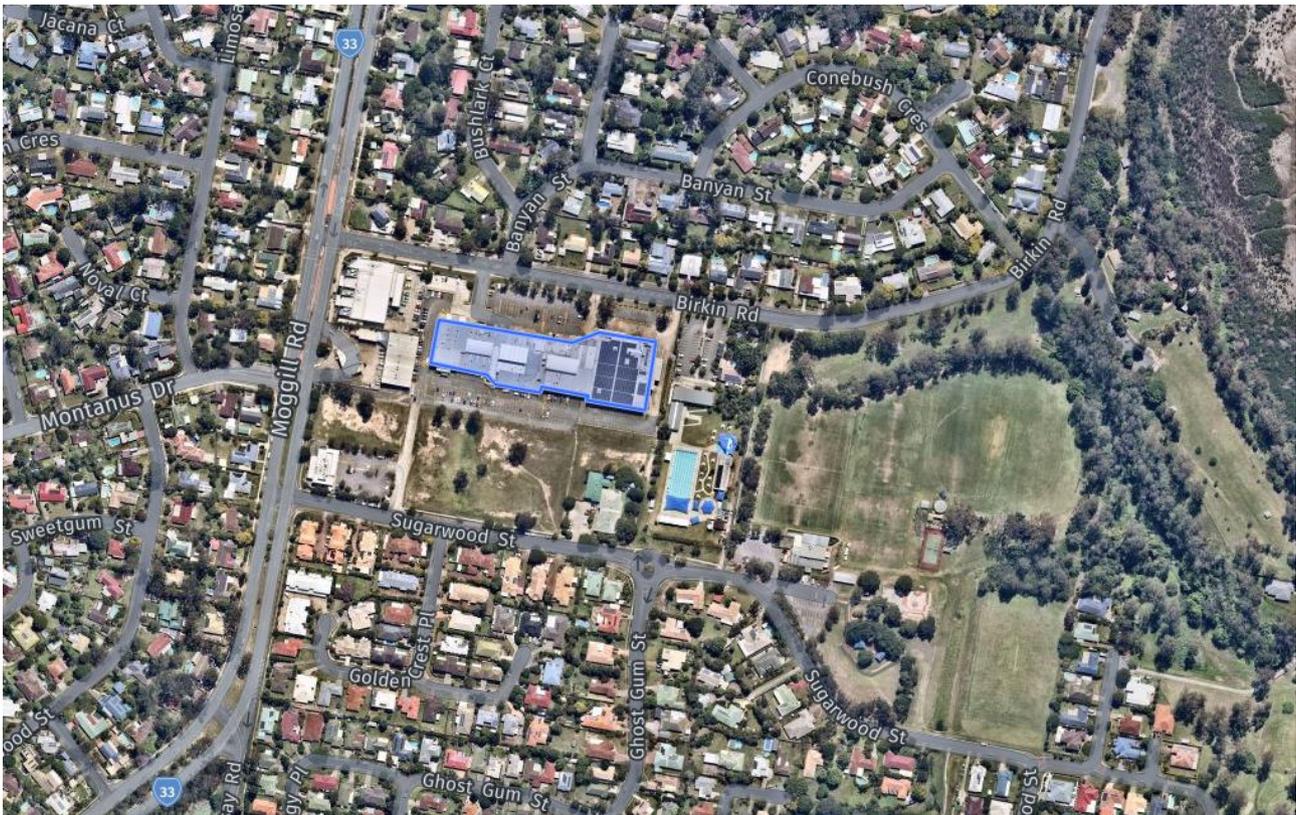
37 Birkin Road

Bellbowrie, QLD 4070



1. Bellbowrie Plaza

The 8,338sqm Bellbowrie Shopping Plaza is located on a large 36,200sqm site and under the same ownership as the 4,040sqm Bellbowrie Tavern with frontage onto Birkin Street and Moggill Road and access via Sugarwood and Birkin Streets. **FIGURE 1.1: Subject Site**



Directly east of the Bellbowrie Shopping Plaza is the Bellbowrie Sports & Community Club which offers residents a restaurant, bar and recreational access to tennis court hire and surrounding playing fields accessible via Sugarwood Street. Sporting facilities on offer within Clark Park include the Moggill Football Club and skate park, with Moggill Girl Guides and Moggill Scouts also located off Birkin Rd in Booker Place Park.

With several already established businesses within the Plaza, having a strong marketing plan is vital in striving for success.

Bellbowrie has a population of approximately 22,443 people, with median age of 41 years old. Established in 1971, the plaza is the centre point of all shopping needs for the local community. As you are aware, COVID-19 affected many businesses, with many shops having no choice but to close. But 3 years on, we are determined to re-build this town centre into what it once was, but even better! The centre will cater for all shoppers needs to add convenience.





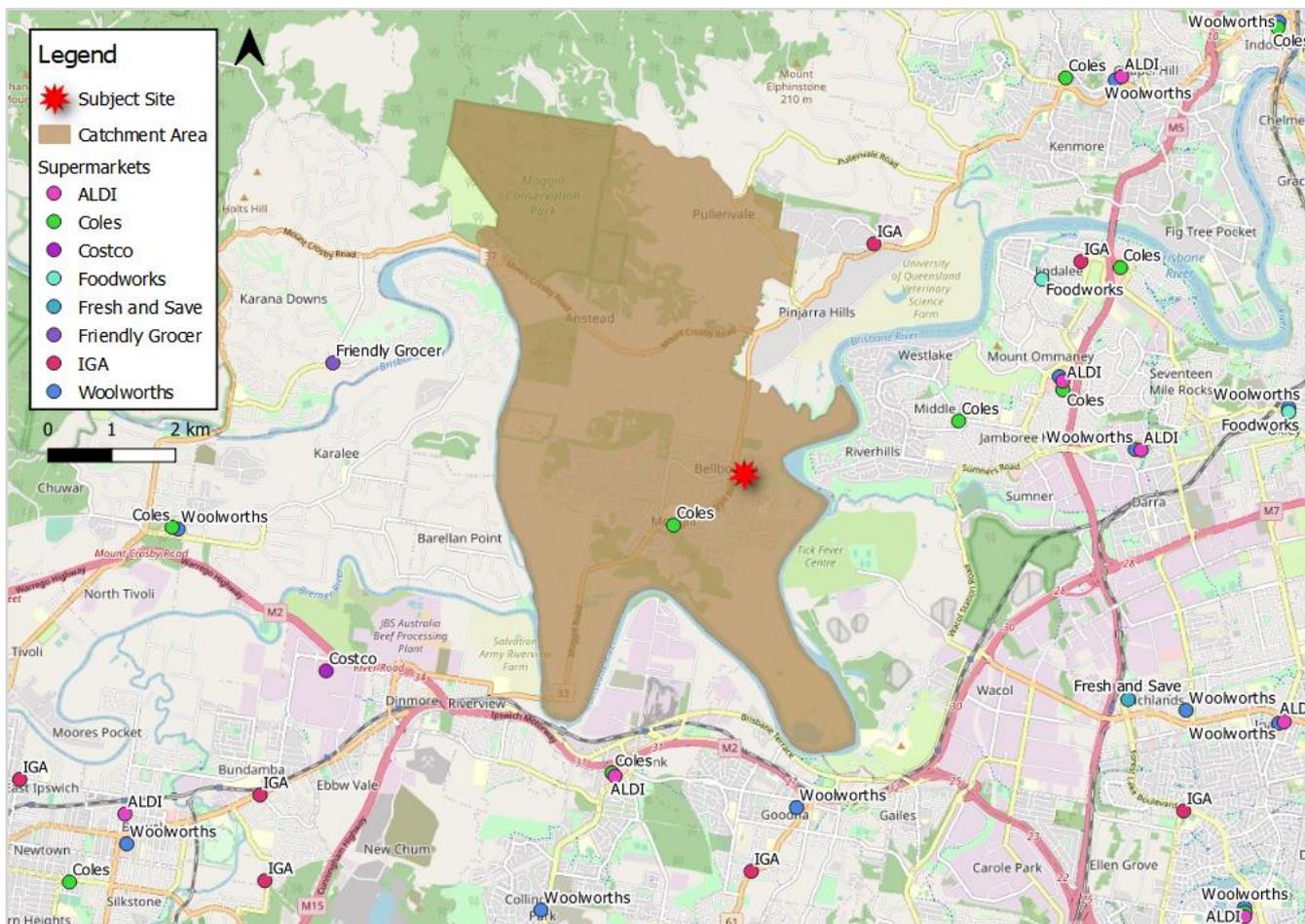
2. Network of Existing Centre

Under the 2014 Brisbane City Council Planning Scheme, Bellbowrie Shopping Plaza is zoned as a District Centre with the purpose of:

“Providing for a large variety of uses and activities to service a district of the local government area, including, for example, administrative, business, community, cultural, entertainment, professional, residential or retail uses or activities.” (6.2.2.3)

The following FIGURE 2.2 illustrates the network of existing centres anchored by supermarkets including the new Coles Supermarket that relocated from the subject site in 2021 to the Moggill Village Local Centre

FIGURE 2.2: Existing Supermarkets



Source: OpenStreetMap, Urban Economics

3. Population and Household Growth

The following TABLE 3.1 summarises the estimated resident population and household growth between 2016 and 2021, and projected growth of the population to 2036, derived from the Australian Bureau of Statistics (ABS) Population and Household Censuses, building approval data and an assessment of residential activity along with the capacity of future growth accommodated for the Catchment Area to 2036.

TABLE 3.1: Population and Household Growth –Catchment Area

	2016 (ACT)	2021 (EST)	2026 (PRO)	2031 (PRO)	2036 (PRO)	2021-2036
ERP	12,972	13,091	13,360	13,630	13,910	+891
Households	4,262	4,451	4,576	4,701	4,830	+379
PPH	3.04	2.94	2.92	2.90	2.88	

Source: ABS, QGSO, Urban Economics

It is estimated that there were some 13,091 residents within the Catchment Area as at June 2021, and projected to include 13,910 persons by 2036, representing a growth more than 890 persons.

It is expected that much of this population growth will come from a moderate level of building approval activity as observed between 2015-2021 financial years for the Bellbowrie – Moggill and Pinjarra Hills – Pullenvale SA2s in TABLE 3.2. Notably, building approval activity rebounded for the 2020/21 financial year, greater than the 2018/19 pre-pandemic activity.

TABLE 3.2: Building Approval Activity

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Bellbowrie – Moggill	31	40	42	45	33	45	26
Pinjarra Hills – Pullenvale	14	12	16	15	7	31	15
TOTAL	45	52	58	60	40	76	41

Source: ABS

School Enrolments

TABLE 3.3 summarises student enrolment growth for the Catchment Area’s primary school, Moggill State School and the area’s high school, Kenmore State High School. Between 2016 and 2021, Moggill State School displayed strong enrolment growth maintaining an average annual growth rate of 2.11%.

School	2016	2017	2018	2019	2020	2021	Growth
Moggill State School	673	736	750	765	755	744	10.55%
Kenmore State High School	1,882	1,940	1,885	1,859	1,960	1,967	4.52%

Source: MySchool

4. Demographic Profile

The results of the 2021 ABS Population and Household Census have been utilised to examine the demographic and socio-economic characteristics of the Catchment Area population and are summarised in TABLE 4.1. The key characteristics of the population are compared with the Brisbane City Council LGA and Queensland (QLD) State averages.

TABLE 4.1 : Demographic Profile

Demographic	Catchment Area	LGA	Queensland
Age Profile (%)			
<i>0-14yrs</i>	22.0	17.4	18.7
<i>15-29yrs</i>	16.0	22.2	19.1
<i>30-59yrs</i>	41.8	42.1	39.4
<i>60+yrs</i>	20.2	18.3	22.8
Average Annual Household Income (\$)	142,890	123,080	104,470
Labour Force (%)			
<i>Unemployment Rate</i>	4.2	5.0	5.4
<i>Workforce Participation Rate</i>	70.0	71.0	65.8
Occupation Profile (%)			
<i>Managers/Administrators</i>	16.2	14.0	12.5
<i>Professionals</i>	32.7	32.0	21.4
<i>Technicians & Trade Workers</i>	10.8	9.9	13.7
<i>Community & Personal Service Workers</i>	10.2	10.5	12.3
<i>Clerical & Administrative Workers</i>	13.5	13.1	12.7
<i>Sales Workers</i>	7.3	7.7	8.7
<i>Machine Operators & Drivers</i>	2.7	4.3	6.8
<i>Labourers</i>	5.3	6.9	10.1
<i>Inadequately Described/Not Stated</i>	1.3	1.6	1.9
Industry Profile (%)			
<i>Agriculture, forestry & fishing</i>	0.5	0.4	2.6
<i>Mining</i>	1.1	1.3	2.3
<i>Manufacturing</i>	4.4	4.7	5.7
<i>Electricity, gas, water & waste services</i>	1.3	1.1	1.2
<i>Construction</i>	8.2	6.7	9.1
<i>Wholesale trade</i>	2.2	2.4	2.4
<i>Retail trade</i>	8.1	8.2	9.3
<i>Accommodation & food services</i>	4.6	7.0	7.2
<i>Transport, postal & warehousing</i>	3.6	4.6	4.7
<i>Information media & telecommunications</i>	1.4	1.4	1.0
<i>Financial & insurance services</i>	3.6	4.0	2.6
<i>Rental, hiring & real estate services</i>	1.7	2.0	1.8
<i>Professional, scientific & technical services</i>	11.8	11.5	6.7
<i>Administrative & support services</i>	2.8	3.3	3.4
<i>Public administration & safety</i>	7.1	6.9	6.2
<i>Education & training</i>	13.6	9.8	8.8
<i>Health care & social assistance</i>	15.4	15.7	15.4
<i>Arts & recreation services</i>	1.6	1.8	1.5
<i>Other services</i>	3.4	3.4	3.9
<i>Inadequately described/Not stated</i>	3.5	4.0	4.5

Highest Level of Education (%)			
<i>Post Graduate Degree</i>	11.7	9.7	4.7
<i>Graduate Diploma & Graduate Certificate</i>	4.2	3.4	2.2
<i>Bachelor Degree</i>	24.0	25.0	15.0
<i>Advanced Diploma Certificate</i>	11.6	9.7	9.4
<i>Not Stated/Inadequately Described</i>	16.1	14.9	22.1
<i>Not Applicable</i>	3.8	6.5	9.0
<i>Not Applicable</i>	28.6	30.8	37.5
Home Ownership (%)			
<i>Owned Outright</i>	31.7	25.3	29.1
<i>Mortgage</i>	54.6	33.7	34.4
<i>Rent</i>	12.7	38.3	33.1
<i>Other/Not Stated</i>	1.1	2.7	3.4
Structure of Dwellings (%)			
<i>Separate House</i>	96.4	62.6	74.8
<i>Semi-detached/Row/Terrace/Townhouse</i>	3.4	11.3	11.7
<i>Flat/Unit</i>	0.1	25.6	12.5
<i>Other/Not Stated</i>	0.0	0.5	1.0
Number of Vehicles Per Dwelling (%)			
<i>0</i>	1.3	8.0	5.7
<i>1</i>	26.4	39.1	35.2
<i>2</i>	46.1	36.3	37.5
<i>3</i>	16.7	10.3	12.8
<i>4+</i>	9.1	5.1	7.2
<i>Not Stated</i>	0.4	1.2	1.5
Relationship in Household (%)			
<i>Couple in Registered Marriage/De Facto Relationship</i>	51.7	45.8	46.1
<i>Lone Parent</i>	3.7	4.0	4.9
<i>Child Under 15yr</i>	22.1	17.8	19.0
<i>Dependent Student (15-24yr)</i>	8.1	5.5	4.7
<i>Non-dependent Child</i>	5.6	5.0	5.8
<i>Other in Family Household</i>	2.7	4.2	4.0
<i>Group Household Member</i>	0.6	5.9	3.8
<i>Lone Person</i>	4.4	10.2	9.8
<i>Visitor in Household (from within Australia)</i>	1.1	1.6	1.9

Source: ABS Census, Urban Economics

Key characteristics of the Catchment Area population include:

- During the 2021 Census, the Catchment Area reported higher proportions of 5-19- and 40-59- years age groups as opposed to the Brisbane City Council and State, see FIGURE 3.5. These age group compositions are typical of a well-established community with a mix of school aged children and mature age work force populations. Approximately 24.4% of the Catchment Area was aged 5-19 years (c.f. 17.9% and 19.1% for the LGA and Queensland average, respectively) with the 40-59 years cohort at least five percentage points greater than the LGA and State, representing 30.9% of the Catchment Area population;

- The Catchment Area households indicate high mobility patterns with 98.3% of households owning at least one vehicle in 2021 and an average of two vehicles per dwelling. Both vehicle ownership and average vehicles per dwellings for the Catchment Area were greater than the LGA (90.8% and 1.6 vehicles/dwelling) and State (92.8% and 1.8 vehicles/dwelling); and
- At the time of the 2021 Census, the average household income for the Catchment Area was \$142,890, \$19,810 and \$38,420 greater than the LGA and Queensland State average, respectively. This is reflective of the Catchment Area with a relatively larger proportion of the population within the key workforce age groups of 40-59 years (30.9% c.f. 25.8% in the LGA and 35.6% for QLD).

Key changes in the demographic and socio-economic characteristics between the 2016 and 2021 Censuses include:

- The Catchment Area between the 2016 and 2021 Census increased its proportion of the population aged 60+ years by three percentage points from 17.2% to 20.2%;
- Between 2016 and 2021 the proportion of professional occupation workers in the Catchment Area fell by six percentage points however there was a combined growth in the incidence of *community & personal service workers, clerical & administrative workers, sales workers, machine operators & drivers and labourers* in the order of 8.3 percentage points. There was also a growth within the *health care & social assistance* industry of 1.6 percentage points between 2016 and 2021; and
- The Catchment Area in 2021 saw an increase in the proportion of persons with tertiary education qualifications as their highest level of education up from 11.8% in 2016 to 15.9% in 2021.

Implications

The Catchment Area community for the Bellbowrie Plaza is characterised by a high mobile, working family community within the middle stages of the family lifecycle with school age and high school children at home. High levels of workforce participation were evident including both male and female workforce participation rates for those in working age groups, indicative of a time-poor community commuting for employment opportunities and higher education services.

This community would have a strong propensity for demand for goods and services that cater to the needs of busy families including sport and recreational facilities, bulk supermarket shopping to cater to the needs of families with school age children, family dining and education support services.

There is also evidence of an increasing share of the population within active aging age groups who would have an increasing propensity for demand for access to health, wellbeing and active leisure facilities and services including education, learning and volunteering opportunities.

5. Retail Expenditure Base

The retail expenditure base is an estimate of the proportion of household income spent on retail items. The propensity for, and the direction of, this expenditure is dependent on the demographic and socio-economic characteristics of the Catchment Area community and the nature and role of surrounding retail facilities. As an example, family communities with school aged children would have a greater propensity for bulk supermarket shopping, clothing, and school items relative to establishing communities experiencing growth in new household formations with larger propensities to demand items such as furnishings, appliances or furniture.

The results of the 2015/16 ABS Household Expenditure Survey have been utilised to derive an estimate of the average annual household retail expenditure of \$35,270 for Queensland, inflated by changes in retail turnover per household to 2022-dollar values. Based on the characteristics of the Bellbowrie Catchment Area, it is estimated that the average annual household retail expenditure would be \$42,560.

Multiplication by the number of households (number of spending units) presents an estimate of the total available retail expenditure within the Catchment Area in 2022-dollars between 2022 and 2031 as summarised in TABLE 4.1.

Growth in the retail expenditure is only due to household growth within the Catchment Area and as such, no assumptions for changes to real wealth nor the effects of inflation are incorporated in the TABLE 4.1 projections.

Between 2022 and 2031, the retail expenditure of the Bellbowrie community is expected to increase by almost \$10million. Significantly, the community by 2031 would represent a supermarket expenditure base of more than \$63million, for which only one supermarket is currently catering to the community.

TABLE: Retail Expenditure Base Projections

Catchment Area	2022 \$M	2026 \$M	2031 \$M	2022-2031 \$M
Retail Expenditure	190.5	194.8	200.1	+9.6
Food Expenditure	80.0	81.8	84.0	+4.0
Supermarket Expenditure	60.0	61.3	63.0	+3.0

Source: Urban Economics

6.0 Conclusions

The Bellbowrie Shopping Plaza is centrally and conveniently located to cater to the weekly shopping and service needs of the surrounding Catchment Area community, and is strategically located amongst a broad range of sporting, community and leisure facilities as the community hub for the Bellbowrie, Moggill and Anstead communities.

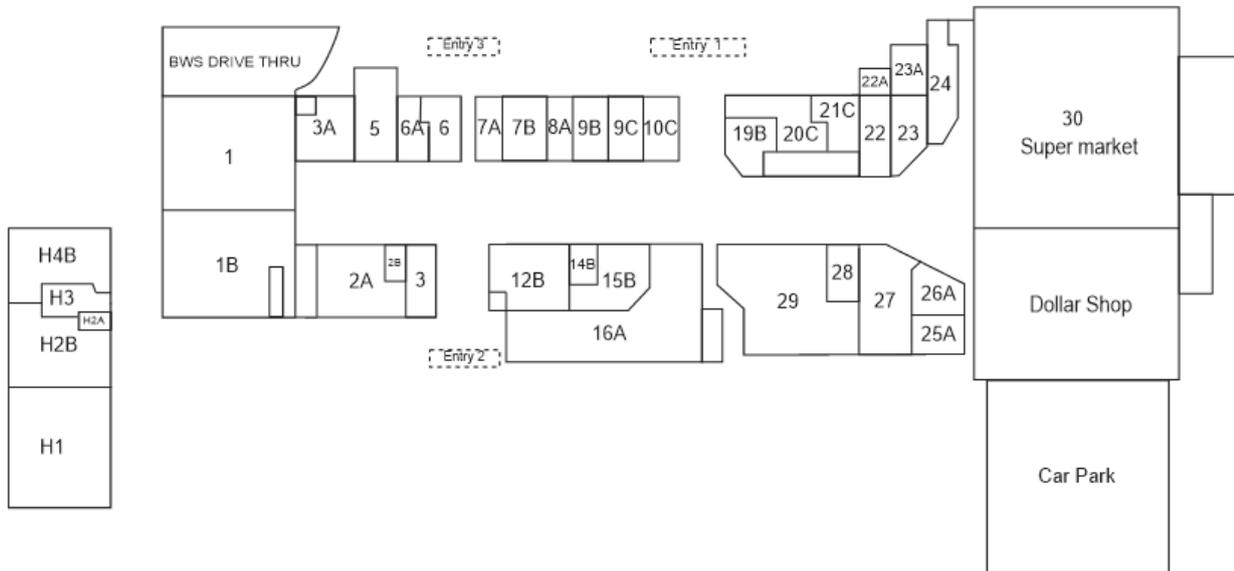
Ongoing residential growth will generate demand for additional facilities and services to cater to the needs of the Catchment Area community, which remains firmly family oriented with a significant representation of school age and high school age children. The Catchment Area community reflects a highly mobile community within the middle stages of the family lifecycle, commuting for employment and higher education opportunities.

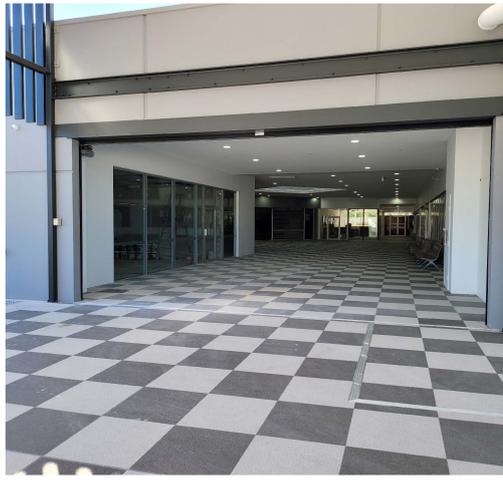
The community would have a particular propensity for demand for goods and services that support the needs of time-poor families, including sport, recreational and leisure services, bulk supermarket shopping, family and casual dining and takeaway services, and education support services including library services.

Whilst demonstrating a significant retail and supermarket expenditure base, only one full-line supermarket is currently located in the Catchment Area, with residents required to travel outside their local area to access choice in weekly shopping needs and services.

The emerging aging profile of the local community with its higher incidence of those in active retirement age groups also suggests an increasing propensity for access to wellbeing, active leisure, learning opportunities (e.g. U3A), health care services and volunteering opportunities.

Floorplan of Bellbowrie Plaza





At Bellbowrie Plaza, you will be supported by Centre Management throughout your tenancy experience. How your business is promoted is very important.

Different types of Marketing Campaigns include:

- Social Media
- Digital Advertising
- Press Advertising
- Direct Mail
- Search Engines
- Email Marketing

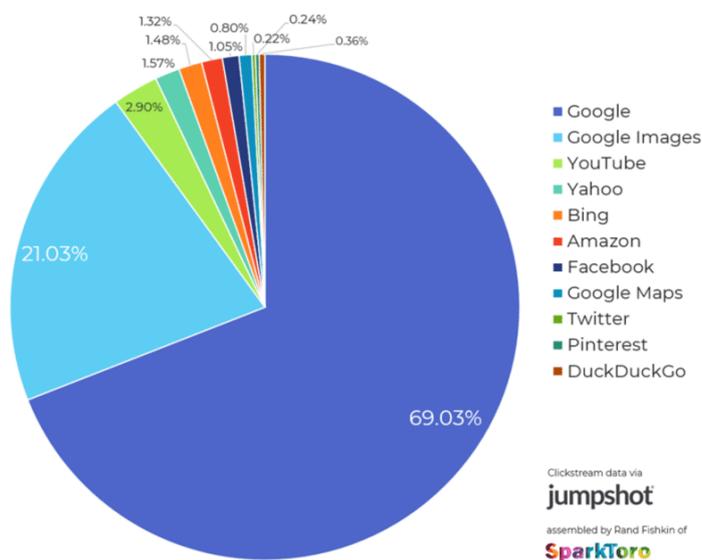


Social media is the strongest form of marketing and can have a huge impact on your business. Given that most platforms are free, it is in your best interest to take advantage of these. With the age median of Bellbowrie to be 41 years, it is more likely than not that most locals have some form of a social account. We will promote your business through Facebook, both on the Bellbowrie Plaza page and the Bellbowrie local community page. It is encouraged that you also create a business page. That way we can share any posts/promotions you have running.

Upon the grand opening of all new businesses, we will supply a promotional poster on your behalf at no cost to you. This will be an in person marketing strategy to advise customers who already shop here on a regular basis. Let's not forget word of mouth also plays a huge part in growing a business.



Research shows that 69.03 of people use Google as their main search engine. Why does this matter? When people are searching for a certain local business, it is so important that your business is one of the first that shows up. And with this, ensuring all details like address, contact details and trading hours are always up to date.



What differentiates Bellbowrie Plaza from other centres? We are part of a family community. We care about our shoppers and we care about our clients. Our centre provides cleaners that attend on site daily to ensure the centre is maintained to a high standard at all times so shoppers are happy and safe at time of their visit.

Further Community Contributions



Once the centre is at full capacity, we aim to bring back again our much loved events for all to enjoy. This will include once monthly markets and fun activities for seasonal celebrations (like Christmas, Chinese New Year, Easter etc.).