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NORTH LAKES ANGLICAN SCHOOL

NEEDS ASSESSMENT

Prepared for JH Northlakes Pty Ltd

September 2025

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1.0 Introduction

This report provides an independent needs assessment for the proposed Anglican school development on the southern portion of the former North Lakes golf course, otherwise referred to as the 'subject site'. This assessment has focused on determining the level of economic need, based on current and future market conditions, as they relate to Anglican school demand within the local area surrounding the subject site.

The subject site is situated along the southern side of Diamond Jubilee Way within North Lakes, with the site area comprising approximately 14.7Ha. The subject site is situated centrally within the established North Lakes community, with the site being less than 1km from the North Lakes Town Centre.

The proposal seeks to develop the subject site as an Anglican school, addressing an observed undersupply of educational facilities catering specifically to the Anglican denomination within the main trade area. This undersupply is quantified by analysis presented throughout this report, which also demonstrates the community benefit that would be realised by establishing the proposed school onsite.

The concept plan for the proposed Anglican school is illustrated in Figure 1.1 over the page.

Figure 1.1 Proposed concept plan



2.0 Site and Local Area Context

The subject site is located south of Diamond Jubilee Way on the southern portion of the former North Lakes Golf Course in North Lakes. Diamond Jubilee Way is the main arterial road that traverses through the North Lakes community, which makes the subject site highly accessible and convenient to the surrounding community. The amenity of the subject site is further enhanced by existing green spaces between the site and the North Lakes town centre, including pedestrian footpaths and cycle paths.

The site is located approximately 800m from the North Lakes town centre, which includes the North Lakes Westfield shopping centre. This proximity creates some level of colocation for the proposed Anglican school, with other proximate community uses including childcare centres, North Lakes Library, North Lakes Health Precinct, and a range of retail and commercial uses.

There are also strong public transport connections to the subject site with the North Lakes Station and Endeavour Boulevard bus stops both within approximately 500m of the subject site. The Mango Hill Train Station is located approximately 2.1km east of the subject site.

There are no existing Anglican Churches within the North Lakes suburb, however, there are several throughout the surrounding area including two within the defined trade area for the subject site, at Redcliffe and Deception Bay.

The proposed Anglican school site is both accessible and central to the North Lakes community and surrounding suburbs. With strong accessibility via road and public transport and co-location within the town centre area, the site is well located to service the primary and secondary education needs of the wider area.

The location of the subject site and relevant surrounding land uses are illustrated in Figure 2.1 over the page.

Figure 2.1 Subject Site Overview



3.0 Catchment Assessment

3.1 Catchment delineation

A catchment is defined as the geographic area for which the proposed use will generate the majority of its enrolments from. The extent of the catchment is driven by a range of accessibility and convenience factors including the accessibility of the subject site, the location of existing schools, road networks and typical commuter patterns, natural and manmade barriers to movement, and urban settlement patterns.

The delineation of the catchment for the subject site has considered the typical local role and function that a school serves for the community. As such, the catchment is confined to that area representing those residents who are most likely to benefit from the increased capacity and accessibility to be provided by the proposed Anglican school.

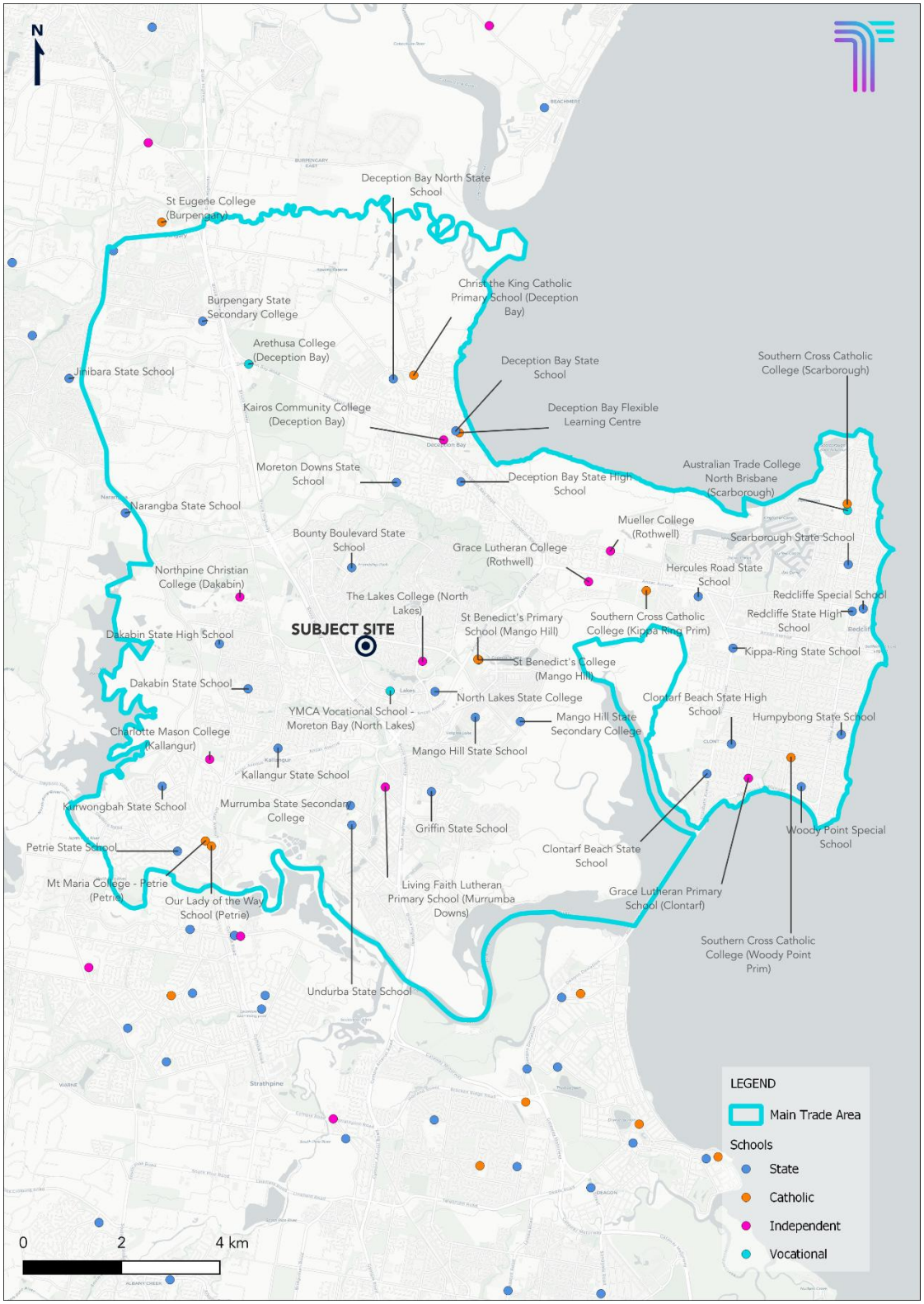
The "How Queensland Travels (2017)" survey completed by the Queensland Department of Transport and Main Roads, indicates that the average distance travelled to school is 4.2km for primary school students and 7.7km for secondary school students, with the large majority of trips being within 10km.

Based on the subject sites' location and typical school travel patterns across SEQ, the catchment area has been defined, generally aligning with a 10km radius from the subject site, though including some areas where major connections and existing commuter routes enhance accessibility to the site. The catchment area for the subject site combined with existing schools are illustrated in the following map.

The catchment area has been used to assess current and forecast demand conditions, which take into consideration the market distribution of demand to government and non-government schools, including specific demand patterns and projections for Anglican school enrolments.

The catchment is illustrated over the page in Figure 3.1.

Figure 3.1 Catchment Area



3.2 Population forecasts

In order to inform estimates of projected population growth, analysis of a range of data and information sources has been undertaken, including:

- ABS Estimated Residential Population (ERP) Data (2016-2024);
- A review of vacant land supply and planned future residential development; and
- Queensland Government population projections, 2023 edition.

The existing population within the identified North Lakes school catchment is an estimated 211,975 persons in 2024. This population is projected to grow strongly, increasing to an estimated 302,859 persons by 2046, representing an increase of over 90,000 persons at an average annual growth rate of 1.6% per annum.

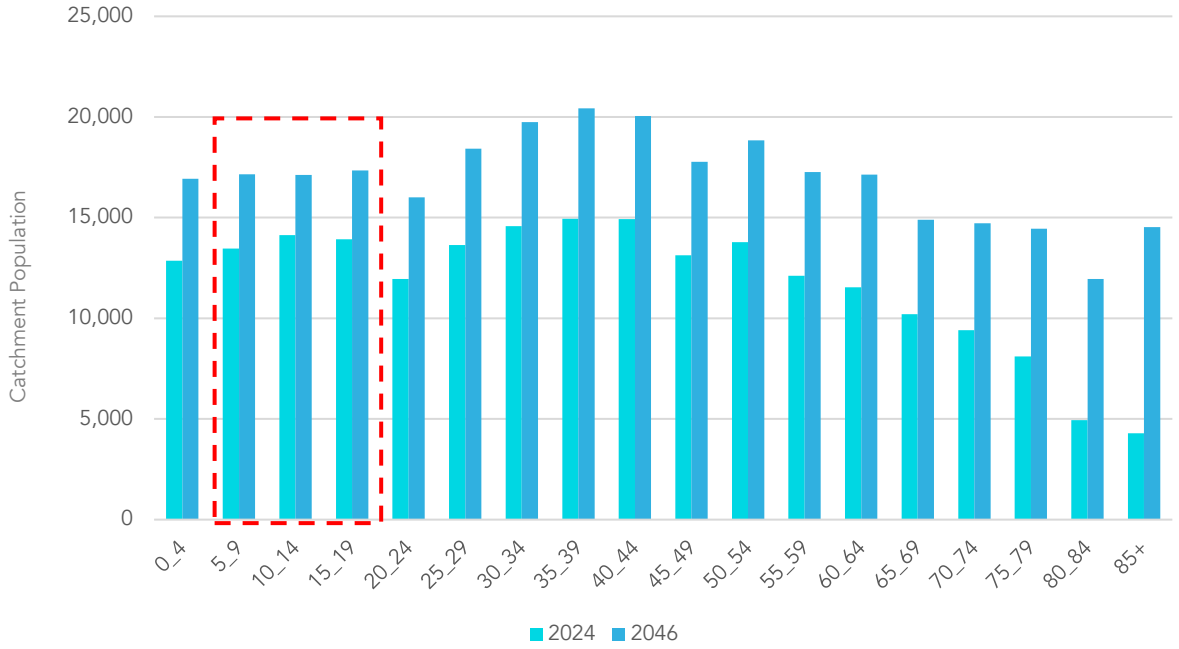
While continued ageing of the population remains the dominant trend, not just locally but across Australia, the catchment is projected to experience continued growth in new and young families driven by the Moreton Regions strong pull factors and attractions including lifestyle, climate, employment opportunities, and relatively affordable housing.

The projected growth in families with children will drive a significant increase in the primary and secondary school age populations across the catchment, with an additional 9,583 children projected by 2046, an increase of over 436 additional children per annum.

Primary school age children represent (50%) of the current school population. By 2046, the primary school age population is projected to increase to 24,446 (+5,279) at 1.11% per annum, while the secondary school age population will increase to 25,275 (+5,416) at 1.10% per annum.

The overall expansion in the school aged population across the catchment will drive demand for additional services, including new schools and associated infrastructure.

Figure 3.2 Projected Catchment Population Growth and Ageing



Source: ABS ERP, QGSO, Think Economics

3.3 Socio-demographic profile

Table 3.2 presents the socio-demographic profile of catchment area residents and compares it to the South East Queensland (SEQ) and Australian averages. Key points to note about the socio-demographic profiles are as follows:

- The proportion of children aged 0-14 years within the catchment is 20.0%, higher than SEQ at 18.7% and Australia at 18.2%
- The proportion of children aged 15-19 is also higher at 6.2% compared to 6.1% in SEQ and 5.7% in Australia.
- Couple families with children and one-parent families account for 44.8%, which is higher than what is observed in SEQ (43.1%) and Australia (42.7%).
- The residential product mix within the catchment is predominantly detached houses, with a smaller proportion of flats and apartments (8.5%).

- Levels of rented properties are much higher within the catchment at 39.3%, compared to 34.8% and 31.7% for SEQ and Australia, respectively. Only 25.4% of homes within the catchment area are owned with a mortgage.

In 2021, the defined catchment comprised a community with a high proportion of young families with children aged 0-14 years and 15–19-year-olds, and with very high proportions of couple and single-parent families with dependent children. Approximately 45% of all families in the catchment have children.

This indicates a community with existing and growing needs for schools based on the high proportions of children in this area. The proposed school is well aligned with the needs of the area, consistent with the demand profile of local residents.

Figure 3.3 Socio-demographic Profile



Source: Census of Population and Housing 2021, Think Economics

Table 3.1 Main Trade Area – Socio-demographic Profile

	Catchment	SEQ	Australia
Population (ERP):			
2016	177,468	3,460,442	24,190,907
2021	197,837	3,784,501	25,688,079
2024	212,036	4,084,508	27,194,369
Average Annual Growth 2016 - 21 (%)	2.20%	1.81%	1.21%
Average Annual Growth 2021 - 24 (%)	2.34%	2.58%	1.92%
Population Density (persons/sqkm)	1,100.1	164.24	3.34
Household Size:	2.54	2.75	2.74
Age Profile:			
Median Age	40	39	38
0-4	6.2%	5.7%	5.8%
5-9	6.9%	6.4%	6.2%
10-14	7.0%	6.6%	6.2%
15-19	6.2%	6.1%	5.7%
20-24	5.8%	6.6%	6.2%
25-29	6.1%	7.0%	7.0%
30-34	6.6%	7.1%	7.3%
35-39	7.0%	7.2%	7.2%
40-44	6.7%	6.6%	6.5%
45-49	6.7%	6.7%	6.4%
50+	34.8%	34.0%	35.4%
Family and Household Composition:			
Couple family with no children	26.2%	27.5%	26.9%
Couple family with children	30.4%	31.2%	31.5%
One parent family	14.4%	11.9%	11.2%
Other family	0.9%	1.1%	1.0%
Lone person households	25.0%	23.8%	25.6%
Group households	3.1%	4.6%	3.8%
Income:			
Median weekly personal income	$785	$855	$805
Median weekly household income	$1,638	$1,873	$1,746
Less than $650 household weekly income	16.1%	12.9%	16.5%
More than $3,000 household weekly income	17.9%	23.9%	24.3%
Tenure:			
Owned outright	25.4%	28.4%	32.1%
Owned with a mortgage	35.3%	36.8%	36.2%
Rented	39.3%	34.8%	31.7%
Dwelling Structure:			
Separate House	75.2%	71.7%	73.0%
Semi-Detached	16.4%	13.2%	12.7%
Flat or Apartments	8.5%	15.1%	14.3%

Source: QGSO, Census of Population and Housing 2021, Think Economics

4.0 Competitive Assessment – Non-Government School Capacity

A supply assessment of all non-government schools throughout the catchment, including a review of current and future capacity, indicates that there are 13 existing non-government schools including five primary schools, one secondary school, and seven combined primary and secondary schools. These schools comprise 60% Catholic schools and 40% 'independent schools'.

Reported primary school enrolments for those non-government schools in the catchment were 5,836 students in 2024. The estimated total enrolment capacity of these schools was 6,126 students, indicating an occupancy rate of approximately 93% in 2024.

Reported secondary school enrolments for those non-government schools in the catchment were 5,652 students in 2024. The estimated total enrolment capacity of these schools was 6,023 students, indicating an occupancy rate of approximately 94% in 2024.

The enrolment reports produced by each school demonstrates that the majority of non-government schools are at or very near capacity with some slightly exceeding the reported enrolment capacities. This demonstrates an existing and significant supply constraint given the projected increase in the population of school aged children within the catchment area.

The current high occupancy rate of existing non-government schools is even more notable as some schools in the catchment have added additional streams over the past few years which increased enrolment capacity. This additional capacity has effectively been absorbed already as a result of demand in the catchment.

It is noted that St Eugene College has been included in this assessment despite being located on the outer northern fringe of the catchment. This provides a conservative assessment as much of the demand for this school will likely come from north of the identified catchment area.

Table 4.1 Private Primary School

Name	Type	Enrolments 2024	Capacity 2024
Southern Cross Catholic College (Scarborough)	Catholic schools	417	420
Christ the King Catholic Primary School	Independent schools	346	350
Southern Cross Catholic College (Kippa Ring Prim)	Catholic schools	353	364
Southern Cross Catholic College (Woody Point Prim)	Catholic schools	199	200
Our Lady of the Way School (Petrie)	Catholic schools	251	300
Christ the King Catholic Primary School	Catholic schools	346	350
The Lakes College	Independent schools	549	685
St Eugene College	Catholic schools	758	770
Northpine Christian College	Independent schools	510	567
Mueller College (Rothwell)	Independent schools	895	910
St Benedict's Primary School	Catholic schools	760	760
Grace Lutheran Primary School (Clontarf)	Independent schools	452	450
	Total	**5,836**	**6,126**

Source: Individual Annual Reports

Table 4.2 Private Secondary School

Name	Type	Enrolments 2024	Capacity 2024
Southern Cross Catholic College (Scarborough)	Catholic schools	628	700
Mt Maria College - Petrie	Catholic schools	417	490
The Lakes College	Independent schools	417	585
St Eugene College	Catholic schools	688	700
Northpine Christian College	Independent schools	439	468
Mueller College (Rothwell)	Independent schools	939	930
Grace Lutheran College (Rothwell)	Independent schools	1,114	1,150
St Benedict's College	Catholic schools	1,010	1,000
	Total	**5,652**	**6,023**

Source: Individual Annual Reports

5.0 Market Demand Assessment

This section assesses existing and forecast demand for primary and secondary school places within the trade area, as well as provides a comparison against competitive supply to determine the market gap.

5.1 School enrolment trends

The distribution of student enrolments to government and non-government schools has changed over the past 15 years, with a general increase in the distribution to non-government schools for both primary and secondary enrolments.

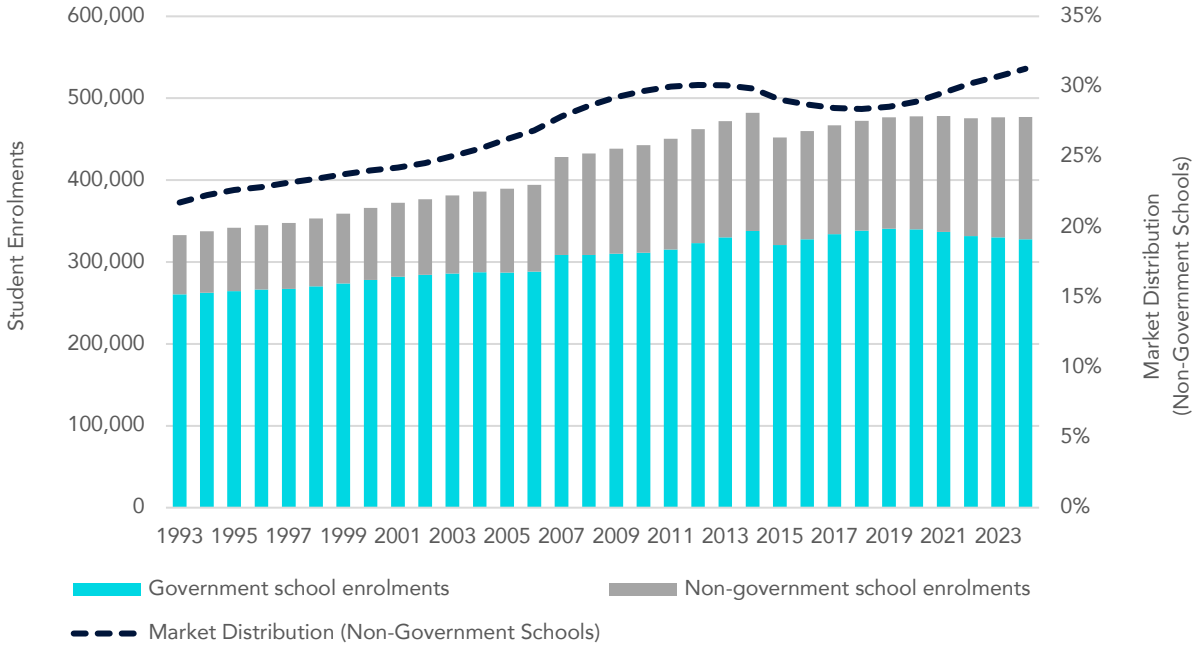
It is noted that there has been a flattening of the market distribution to non-government schools during the past five years. While this may be related to the changes in year level allocations (i.e., prep added to primary in 2007 and grade 7 added to secondary in 2015), it has also likely been influenced by a slowdown in the establishment of new non-government schools, which places further enrolment pressure on government schools.

The charts below illustrate this trend, with the market distribution to non-government primary and secondary schools increasing by an average annual growth rate (AAGR) of 1.2% and 0.8%, respectively.

While market distribution rates have re-adjusted somewhat over the last five years on the back of structural changes to schooling across Queensland, based on the trend over the past 15 years (which extends to at least the past 25 years based on observed data), we would expect the market distribution rate to non-government schools to continue to increase.

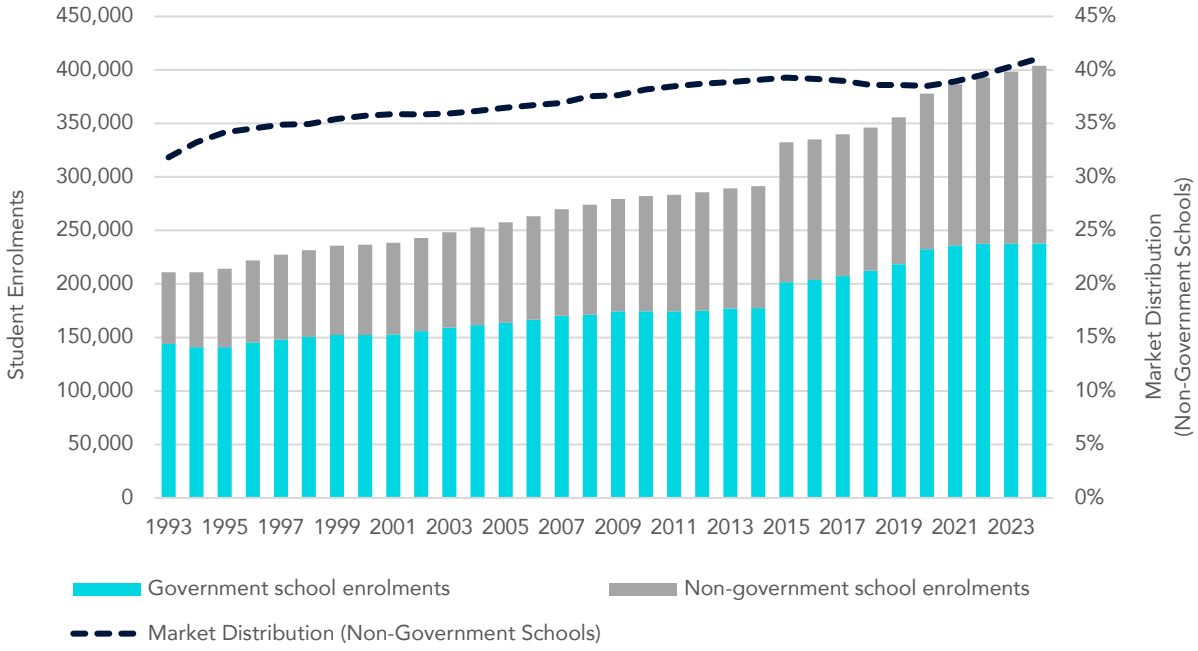
The distribution rates between government and non-government schools observed within the defined catchment have been used to determine projected enrolment demand within the catchment over the period to 2046.

Figure 5.1 Primary School Students



Source: ABS, Schools, 2024

Figure 5.2 Secondary School Students



Source: ABS, Schools, 2024

5.2 Demand assessment -Primary school

The market gap for new non-government school facilities within the catchment is based upon a comparison of the forecast demand conditions with current and forecast supply capacity. This determines the net estimated over/under supply for non-government primary school and secondary school capacity within the catchment area.

It is noted that the market gap analysis makes an allowance for an additional 5% of demand from beyond the catchment area for both primary and secondary schools. It is also assumed that the 'effective capacity' for the existing and planned supply is 95% of the total capacity, with past enrolment rates demonstrating that most schools operate slightly below the total potential student capacity.

The market gap assessment for non-government primary schools within the catchment is presented in Table 5.1 below.

Table 5.1 Primary School Catchment Demand

	Primary Schools					
	2024	2026	2031	2036	2041	2046
	Projected school-aged persons					
Total student population	19,237	19,596	20,710	21,887	23,131	24,446
	Government school demand					
Government school enrolments	**11,893**	**12,115**	**12,804**	**13,532**	**14,301**	**15,114**
Additional BTA demand (5%)	595	606	640	677	715	756
Total government school enrolments	**12,488**	**12,721**	**13,444**	**14,208**	**15,016**	**15,869**
	Non-government school demand					
Non-government school enrolments						
Catholic school	2,697	2,747	2,903	3,069	3,243	3,427
Independent school	2,617	2,666	2,817	2,977	3,146	3,325
Non-government school enrolments	**5,314**	**5,413**	**5,721**	**6,046**	**6,389**	**6,753**
Additional BTA demand (5%)	266	271	286	302	319	338
Total non-government school enrolments	**5,580**	**5,684**	**6,007**	**6,348**	**6,709**	**7,090**
	Non-government school capacity					
Total non-government school capacity	5,836	6,126	6,126	6,126	6,126	6,126
Practical capacity (natural vacancy of 5%)	5,544	5,820	5,820	5,820	5,820	5,820
	Non-government school gap					
Estimated market gap - non-government schools	-35	136	-187	-528	-889	-1,271

Source: ABS Census 2021, Think Economics

The market gap assessment indicates that in 2024 there was a small surplus in capacity of 136 places, however, this is a conservative estimate as the recorded enrolments across non-government schools within the catchment suggest that demand from beyond the trade area is higher than 5% and likely closer to 10%, which would result in a small undersupply. Even based on the conservative estimate of BTA, there is a projected undersupply of 187 student places in 2031, which is projected to increase to more than 520 places by 2036 and more than 1,270 places by 2046.

According to the school Independent Schools Queensland (2024), 19% of all schools classified as independent schools are Anglican Schools. This proportion has been applied to estimate the enrolment demand for Anglican school places within the catchment and is presented in Table 5.2 below.

There are currently no Anglican schools in the catchment. As such, there is an estimated gap in Anglican primary school enrolment capacity of approximately 500 places in 2026, which is projected to increase to more than 560 places in 2036 and more than 630 places in 2046. This represents the majority of the non-government primary school enrolment capacity shortfall over the medium term.

Table 5.2 Primary Anglican School Demand

	2024	2026	2031	2036	2041	2046
Independent School Enrolments	2,617	2,666	2,817	2,977	3,146	3,325
Independent School Capacity	2,962	2,962	2,962	2,962	2,962	2,962
Practical capacity (natural vacancy of 5%)	2,814	2,814	2,814	2,814	2,814	2,814
Estimated market gap - Independent Schools	197	148	-3	-163	-333	-511
Anglican School Enrolments	497	506	535	566	598	632
Anglican School Capacity	0	0	0	0	0	0
Estimated market gap - Anglican Schools	-497	-506	-535	-566	-598	-632

Source: Think Economics

5.3 Demand assessment -Secondary school

The comparison of enrolment capacity and demand conditions in 2024 indicate an estimated existing undersupply of 1,361 non-government secondary school student places. This demonstrates that a high proportion of non-government secondary students that reside within the catchment, are actually enrolled in schools outside of the catchment, primarily due to capacity constraints.

By 2036 the undersupply in non-government secondary school enrolment capacity is projected to increase to more than 2,600 student places and more than 3,600 student places by 2046. In this context, the subject site represents a logical location for additional school facilities offering strong co-location benefits with existing community amenities and public transport connections.

Table 5.3 Secondary School Catchment Demand

	Secondary Schools					
	2024	**2026**	**2031**	**2036**	**2041**	**2046**
	Projected school-aged persons					
Total student population	18,202	20,299	21,443	22,651	23,927	25,275
	Government school demand					
Government school enrolments	**11,027**	**12,297**	**12,990**	**13,722**	**14,495**	**15,312**
Additional BTA demand (5%)	551	615	650	686	725	766
Total government school enrolments	**11,578**	**12,912**	**13,640**	**14,408**	**15,220**	**16,077**
	Non-government school demand					
Non-government school enrolments						
Catholic school	2,948	3,288	3,473	3,669	3,876	4,094
Independent school	3,462	3,861	4,078	4,308	4,551	4,807
Non-government school enrolments	**6,410**	**7,149**	**7,552**	**7,977**	**8,427**	**8,901**
Additional BTA demand (5%)	321	357	378	399	421	445
Total non-government school enrolments	**6,731**	**7,506**	**7,929**	**8,376**	**8,848**	**9,346**
	Non-government school capacity					
Total non-government school capacity	5,652	6,023	6,023	6,023	6,023	6,023
Practical capacity (natural vacancy of 5%)	5,369	5,722	5,722	5,722	5,722	5,722
	Non-government school gap					
Estimated market gap - Non-government schools	-1,361	-1,784	-2,207	-2,654	-3,126	-3,624

Source: ABS Census 2021, Think Economics

Table 5.4 provides the more detailed estimations of non-government school enrolment demand as well as a market gap assessment specifically for Anglican secondary schools in the catchment. Based on the average enrolment distribution to Anglican schools, there is estimated to be enrolment demand, and a market gap based on the lack of any existing supply, of almost 700 student places in 2026. This undersupply is projected to increase to 775 students places by 2036 and to more than 860 places by 2046.

Table 5.4 Secondary Anglican School Demand

	2024	2026	2031	2036	2041	2046
Independent School Enrolments	3,276	3,654	3,860	4,077	4,307	4,549
Independent School Capacity	2,958	3,133	3,133	3,133	3,133	3,133
Practical capacity (natural vacancy of 5%)	2,810	2,976	2,976	2,976	2,976	2,976
Estimated market gap - Independent Schools	527	612	476	333	181	21
Anglican School Enrolments	623	694	733	775	818	864
Anglican School Capacity	0	0	0	0	0	0
Estimated market gap - Anglican Schools	-623	-694	-733	-775	-818	-864

Source: Think Economics

On the basis of the projected enrolment capacity demand and the corresponding market gap assessments, there is a clear undersupply and need for an increase in non-government primary and secondary school capacity within the catchment. Specifically, the greatest need is for an Anglican school given the lack of any Anglican schools within the catchment and the existing and increasing undersupply in enrolment capacity, which is likely causing many students that reside locally to have to travel outside the catchment to access a preferred school.

6.0 Need Implications

The analysis presented throughout this report demonstrates that there are strong need conditions supporting the establishment of the proposed Anglican school at the subject site. The subject site is well located to respond to demonstrated need conditions, with the accessibility of the site and the proximate colocation of other community amenities within the North Lakes town centre, further contributing to the positive response to community needs and benefits.

The defined catchment is a growing urban area with projected population growth to maintain a steady increase in demand for school enrolment capacity within the local area. Much of this growth in demand will need to be provided for by the establishment of new schools with many existing schools indicating that their existing level of enrolments is near or already at capacity.

The need to support new school sites in the local area is critical to ensuring that the community has adequate access and choice in schools supply. A shortfall in enrolment capacity often results in varied negative community impacts, including reduced accessibility, the need to travel extended distances to access schools, increased school fees as a result of limited competition, and increased pressure on the government school network as a result of enrolment constraints for non-government schools.

Site scarcity and the ability to source suitable and available urban infill sites of sufficient size, has become increasingly difficult as illustrated by the requirement for new vertical inner-city school builds in Brisbane. The projects are typically more expensive and sometimes require the negotiation and use of non-school owned sporting and play facilities. Located approximately 800m from the North Lakes CBD, the subject site offers strong links with existing educational facilities, libraries, community facilities and precincts, childcare facilities, pools, sporting facilities, retail businesses, parking, and public transport.

The subject site will support very strong community benefits as well as broader educational network benefits relevant to schools network planning undertaken by Queensland Education by increasing private investment and funding directed to non-government school

infrastructure and capacity, thereby reducing the need for government school related investment and funding.

The following provides a summary of the key implications related to the economic need for the proposal, consideration of alternative sites in the area, and key community benefits associated with the proposal.

Economic need implications

- The intent of the proposed Anglican school is to cater to the demand predominantly generated within the defined catchment, with the population within this local area expected to increase from 211,976 people in 2024 to 244,084 people in 2031 and 302,859 people by 2046.
- The market gap assessment demonstrates that there was an existing undersupply of 497 Anglican primary school places in 2024, which is projected to grow to an undersupply of 632 student places by 2046, if additional enrolment capacity is not established.
- The market gap assessment indicated a 658 student place gap in Anglican secondary school places in 2024, which is projected to increase to 913 student places by 2046.
- The projected growth in families with children within the catchment will drive a significant increase in the primary and secondary school age populations, with an additional 10,695 children projected by 2046, representing an increase of over 486 additional children per annum. This overall expansion in the school aged population across the catchment will drive demand for additional services, including multiple new schools throughout the area.

Alternative site assessment

- The subject site benefits from a central location with strong connectivity to the town centre and key amenities, enhancing accessibility for prospective students and staff.
- The site is well-positioned relative to demonstrated need, supporting efficient service provision and meeting identified education demand in the catchment.
- Market and site analysis indicate no other suitably zoned or appropriately located sites within the area, reinforcing the site's strategic importance and ability to effectively and efficiently respond to community needs and benefit outcomes.

Project benefit implications

- The proposed Anglican School will contribute to the overall education supply in the local area, increasing available capacity as well as providing parents with an improved choice in school provider, location and price.
- The subject site provides the opportunity to locate an Anglican school proximate to a well-established area, in close range to existing community amenities and the town centre, which provides a very high level of convenience and accessibility.
- An undersupply in denomination specific schools in the catchment should be avoided as it can lead to parents having to drive far distances to preferred schools, adding unnecessary commuter traffic to the area.
- In a growing community, ensuring that there are sufficient community infrastructure and services within a local area is essential to efficient community building including supporting a diverse and socially integrated community profile.
- The proposed Anglican school will generate an increase in private investment directed towards education infrastructure and funding in the local area, thereby potentially reducing the burden on public funding associated with the establishment of new schools.

In conclusion, the analysis presented in this report demonstrates that there are significant need conditions supporting the proposed Anglican school, which will support considerable community and economic benefits.

Disclaimers

Inherent Limitations

This report provides a summary of Think Economics research during the course of the work undertaken for JH Northlakes Discretionary Trust under the terms of the engagement contract dated September 2025.

The services provided in connection with this engagement comprise a market research and advisory engagement, and consequently no opinions or conclusions intended to convey assurance have been expressed. Think Economics have indicated within this report the sources of the information provided. We have not sought to independently verify those sources unless otherwise noted within the report.

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