Redland City Centres & Employment Review

Redland City Council 2009




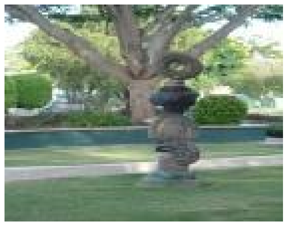




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Table of Contents

List of Figures

List of Tables

Executive Summary

Study Context and Objectives

This report presents the findings of a review of the Redland Shire Centres Study, which was prepared on behalf of Redland Shire Council in August 2001. In the time since Council adopted the recommendations of the 2001 Centres Study, socio-economic trends and changes, developments in the scale and pattern of urban development, the evolving roles and functions of activity centres, changing retail trends, development pressures in some parts of Redlands, local and regional policy developments and anticipated population growth have all influenced Council's decision to revise and update the study.

Perhaps the policy development of greatest impact and influence in recent years came with the March 2005 release of the State Government's South East Queensland Regional Plan (SEQRP). The Regional Plan requires all Local Government Authorities to assist with its implementation through the alignment of local plans and policies. The SEQ Regional Plan is currently under review.[1] In order to inform and guide Redland City Council's input to the SEQ Regional Plan review, this Centres and Employment Review presents recommendations to Council to encourage an appropriate policy framework which ensures that Redland's activity centres are positioned to deliver the best activity and employment outcomes in light of the principles and directions of the SEQ Regional Plan.

Activity Centres Defined

The scope of this Centres and Employment Review is much wider than narrow interpretations of 'retailing' and 'business' to include recreation, leisure, culture & entertainment, tourism, government, education and community and personal services. As such, Redland City's activity centres serve varying but complementary roles and functions as 'multi-purpose' centres. For example, they are:

- dispensers of retail goods and services;
- community meeting places;
- centres of social services;
- locations for education and employment;
- settings for recreation, leisure and entertainment activities; and
- places for living through new forms of higher density housing in mixed land use settings.

In the interests of ecologically sustainable development, it is the intent of Redland City Council that its multi-purpose activity centres be well-served by public transport (including pedestrian and bicycle networks) and located in proximity to other 'networked' centres which complement their

[1] At the time of writing, the SEQRP was under review. The *Draft South East Queensland Regional Plan 2009-2031* was released for public consultation for the period December 2008 to April 2009, with an updated SEQ Regional Plan to be finalised by the Queensland Government in July 2009.

role and function. This will contribute to greater regional prosperity and therefore, to the underlying principles of the South East Queensland Regional Plan.

Informing Centres Planning: Redland's Changing Population and Evolving Economy

This Centres and Employment Review contains the following key findings with respect to forecast population and employment trends in Redland City and the implications for centres planning and development:

- Redland City has experienced high rates of population growth over the last 20-30 years. The population of the City is expected to continue growing from approximately 133,000 in 2006 to around 182,700 by 2031.[2]

- Of the estimated increase of approximately 49,700 people in Redland City over the twenty-five year period to 2031, the suburbs of Thornlands, Victoria Point and to a lesser extent Redland Bay, Cleveland and Capalaba are expected to receive the greatest share of this population growth. Population growth on the Southern Moreton Bay Islands is also expected to continue at rates determined by prevailing market conditions.

- Redland City plans to increase its rate of employment self-containment from 40% in 2006 to a rate of 60% by 2031 (employment self-containment refers to the proportion of total employed residents who work in a local job). To provide the opportunity for 60% of the City's workforce to work locally in 2031, a net (cumulative) increase of approximately 24,500 local jobs between 2006 and 2031 is required (employment self-sufficiency refers to the number of local jobs as a proportion of employed residents). This is the number of local jobs required over and above existing jobs located in Redland City of about 32,000 in 2006. Therefore, total employment (that is, jobs actually located in Redland City) would be around 56,500 in 2031.

- The employment growth forecast provides for Redland City to continue developing as a lifestyle and knowledge-based economy. This includes the development of new growth sectors like 'Lifestyle' Horticulture, Education, Professional Business Services (like finance, legal and property services), Cultural & Creative Industries, Marine & Bay Businesses and Home Based Businesses. It also includes the development of traditional industries into new, higher value forms, including agriculture and manufacturing and population driven sectors like retailing, health & community services and construction. It also maintains that Redland's tourism industry will continue to grow and evolve.

- Of the 24,500 additional jobs expected in Redland City between 2006 and 2031, it is estimated that just under half will be located in Redland City's activity centres.

[2] The population of approximately 133,000 is the Australian Bureau of Statistics (ABS) Estimated Resident Population figure and is used as the base for Redland City Council's 2006-2031 population planning estimates. This figure has been revised by the ABS to 131,332 following preparation of Council's 2006-2031 population planning estimates.

- Consistent with local (and regional) policy settings, the majority of the projected employment increase will be provided in the City's Major Activity Centres zone. The Principal Activity Centres of Capalaba and Cleveland will accommodate the bulk of this demand. The Victoria Point Major Activity Centre in the south of the City will also accommodate some of this growth.

- It is estimated that between 2006 and 2031 approximately an additional 430,000 square metres of floorspace (GFA) will be required to support targeted jobs growth in Redland City's activity centres. That is, 430,000 square metres of in-centre retail and commercial floorspace. This excludes out-of-centre retail and commercial and industrial floorspace requirements. In other words, it is the floorspace required to accommodate forecast employment located within the City's network of activity centres.

- Allowing for site area and buffer requirements, this projected additional in-centre floorspace requirements translates into approximately 107 hectares.

- In addition to the forecast in-centre employment and associated floorspace requirements, it is estimated that another 75,800 square metres would be required to accommodate non-centre based retail and commercial employment in Redland City over the 25 year period to 2031. This includes large format retailing, home-based businesses and commercial / office functions tied to manufacturing activities and lifestyle horticultural activities. Allowing for site area and buffer requirements, this translates into approximately 19 hectares of land required for non-centre based retail and commercial activity.

- The bulk of this non-centre employment growth and associated floorspace requirement is expected to be accommodated in the commercial areas surrounding Capalaba, Cleveland, and Victoria Point as well as Redlands Business Park at Redland Bay and the future Thornlands Integrated Employment Area.

- It is estimated that between 2006 and 2031 an additional 127 hectares will be required in Redland City for more traditional industrial purposes (including manufacturing/processing, transport/freight-oriented industry, general service industries (like construction and commercial services and repairs) and utilities). This is the land required, including land for employment and for required buffers, internal roadways, landscaping and easements to accommodate forecast industrial employment growth. The future Thornlands Integrated Employment Area and the Redlands Business Park in Redland Bay will house the majority of forecast growth in industrial employment.

- In addition to the demand for industrial land shown above, Redland will require an adequate buffer of industrial land to accommodate any unanticipated and significant increase in demand. As a rule of thumb, it is generally accepted that in any economy, there should be at least a 15 year buffer stock of industrial land to accommodate any unanticipated and significant jump in demand or if for example, Redland City is able to capture more demand for industrial land from outside the region. This means that in order to accommodate any unanticipated and significant increase in demand that could potentially occur over the 25 years, Redland City should have in reserve at least another 76 hectares of land for industrial purposes. This is the land area required to house employment and for necessary private and public domain allowances such as buffers and easements. This industrial land buffer will be provided in the future Thornlands Integrated Employment Area.

Recommendations

Centres Planning Principles

This Redland City Centres and Employment Review contains seven key principles which are designed to guide centres planning and development in Redland City. In short, they are:

- **Diversity –** create centres and other networked nodes of activity providing for integrated employment, for a range of uses.

- **Vibrant and Vital** – create centres that are vibrant and vital.

- **Economic Functioning** – Redland City's activity centres have an important economic function.

- **Planning and Urban Design** – provide centres that maximise their accessibility, integrate with surrounding land uses, have positive character and identity and are quality spaces;

- **Linkages and Networks** – within and between the network of activity centres.

- **Ecological Sustainability**

- **Flexibility –** with respect to the planning without compromising other key principles.

These principles are designed to help guide activity centres planning and development to the year 2031.

Activity Centres Network

From a centres planning perspective, it is recommended that Redland City Council seek to encourage:

- a network of multi-purpose activity centres as key locations of economic activity;
- growth and consolidation of employment in the City's activity centres; and
- the establishment of integrated employment areas providing for a mix of economic activity.

Economic and employment activity is encouraged and supported within a network of multi-purpose activity centres that recognises:

- Capalaba and Cleveland as Principal Activity Centres for the City;
- Victoria Point as a major activity centre serving the southern areas of the City;
- Alexandra Hills and Birkdale district activity centres;

- Allowance for the future elevation of the Redland Bay neighbourhood centre to a district centre but only at or close to a time when the population threshold is met (estimated to be around the year 2026);
- Investigate the future need for a centre within the future Thornlands Integrated Employment Area through detailed planning investigations; and
- Other neighbourhood and local centres serving local catchments.

Centre Recommendations

The following key recommendations are made with respect to Redland City's network of activity centres and their respective (and complementary) roles and functions in ensuring that they are each positioned to deliver the best activity and employment outcomes in light of the principles and directions of the South East Queensland Regional Plan.

Capalaba and Cleveland Principal Activity Centres

- Capalaba is recognised in the SEQ Regional Plan as Principal Activity Centre serving a catchment of regional significance. In order to accommodate employment forecasts for Capalaba, an additional 123,000 square metres of in-centre retail and commercial floorspace would be required (that is, over and above existing in-centre retail and commercial floorspace). The forecasts presented in this review also show that growth in non-centre based retail and commercial employment over the next twenty years will generate demand for around 21,700 square metres of floorspace in Capalaba. Based on information available from Council with respect to existing centre capacity, it is assumed that, depending on Council policy with respect to building heights and densities in the Capalaba Major Centre, forecast employment growth could well be accommodated.

- It is recommended that Redland City Council undertake a Capalaba Centre development capacity study as part of master planning to pro-actively plan for the scale and intensity of forecast employment demand consistent with the City's underlying centres planning principles.

- It is recommended that Council continues to support large format retail and commercial activities to locate in areas zoned for these uses peripheral or adjacent to the Major Centre Zone at Capalaba.

- Cleveland is recognised in the SEQ Regional Plan as Principal Activity Centre serving a catchment of regional significance. In order to accommodate employment forecasts for Cleveland, an additional 100,000 square metres of in-centre retail and commercial floorspace would be required. It is considered that forecast employment could well be accommodated.

- It is estimated that growth in non-centre based retail and commercial employment over the twenty-five years to 2031 will generate demand for around 17,600 square metres of floorspace in Cleveland. It is recommended that Redland City Council continues to support encourage large format retail and commercial activities in areas zoned for these uses peripheral or adjacent to the Major Centre Zone at Cleveland.

The Victoria Point Major Activity Centre

- The Redlands Planning Scheme makes reference to Victoria Point as a Major Centre zone. This is not reflected in the 2001 Centres Study which recognises Victoria Point as a District Centre. Given the recent and forecast population growth in Victoria Point and its wider catchment, particularly to the south, it is recommended that centres planning be revised to recognise Victoria Point as a Major Centre. This should be reflected in the SEQ Regional Plan.

District Centres at Redland Bay

- The RPS currently recognises Redland Bay as a Neighbourhood Centre. The RPS states that District Centres serve catchment populations of approximately 15,000 persons. Redland Bay's population is expected to reach 15,000 by the year 2026 and about 16,000 by the year 2031. It also serves as the gateway centre to the Southern Moreton Bay Islands providing some of the higher order retail and commercial services to the Island community.

- While a future catchment analysis is beyond the scope of this review, based on the population and employment forecasts, benchmarks regarding centre catchments, the role of the centre in providing some of the higher order services to the growing community on the Southern Moreton bay Islands and information on centres capacity reported in latter sections of this review, it is considered that the Redland Bay Neighbourhood Centre could be 'promoted' in the hierarchy to a District Centre but not until the population threshold necessary to support a District Centre is reached (i.e. around the year 2026).

- By 2031, both Birkdale and Alexandra Hills will be nearing populations of around 17,500 and 18,900 respectively, which remain well below the catchments required of Major Centres like Capalaba and Cleveland and as such, both Birkdale and Alexandra Hills should continue to serve their District Centre role.

Neighbourhood Centres

- It is recommended that the role and function of Neighbourhood Centres as stated in the RPS be maintained.

Local Centres

- Local centres typically perform convenience retail functions to meet the day-to-day needs of local residents. These centres provide a gross floor area of 1,000 to 2,000 square metres for local centre uses. They can comprise a mix of specialty stores (such as bakeries, milk bars, newsagents, etc.) and in some cases a limited line local supermarket. It is recommended that the role and function of Local Centres as stated in the RPS be maintained. Redland City Council will need to plan and designate land for local centres within the City's growth areas, consistent with local settlement patterns and the timing of that settlement over the twenty-five years to

2031. For each area, a structure plan is to be completed in accordance with the Planning Scheme. The structure plans will inform issues and constraints, identify areas and subsequent determination of land uses and associated infrastructure including new local centres where required.

Integrated Employment Areas

Thornlands Integrated Employment Area

- The Redlands Planning Scheme identifies and provides for the protection of 550 hectares of land at Thornlands pending more detailed investigation of the area for the establishment of a major integrated employment area. The draft SEQ Regional Plan also proposes the area be protected from inappropriate or premature applications until detailed investigations are undertaken and a structure plan is in place through designation of the area as a Future Growth Area.

- The Thornlands Integrated Employment Area is intended to become the pre-eminent economic and enterprise area within the City developing as a sustainable, modern, high quality, structure planned integrated economic and enterprise area providing high levels of local employment to 2031 and beyond. The area is intended to accommodate a range of compatible industries that the City has a competitive and comparative advantage in and are consistent with the image, identity, character of the City. These industries include low impact manufacturing, knowledge and creativity based enterprise, traditional light industrial and general service logistics. The area is also intended to include a retail function directly related to the enterprise uses of the area and accommodate a regional sporting facility. Opportunity for compatible educational uses within the area will also be pursued.

- By encouraging the co-location of a range of compatible economic and enterprise uses, integrated employment areas can potentially deliver significant benefits by way of economic clustering, more efficient access to and use of infrastructure and services including community services, retail facilities and other personal and recreational services.

- To ensure the desired outcomes for the Thornlands Integrated Employment Area are achieved and given demand for industrial land and non-centre based retail and commercial employment land in Redland City, further investigations and structure planning should be progressed as a matter of priority. As part of investigations and structure planning, the role and function of the Integrated Employment Area within the City's activity network needs to be identified.

Redlands Business Park, Redland Bay

- Council has approved a proposal for the establishment of an integrated employment centre at German Church Road in Redland Bay consistent with the adopted Redlands Business Park Structure Plan (October 2007) prepared by Jensen Bowers. The Redlands Business Park is 43.6 hectares in total with approximately 23 net hectares being made available through a structure plan for employment uses to be developed over four stages. An underlying objective of the structure plan is to facilitate opportunities for diverse, dynamic and sustainable employment.

The structure plan proposes a mix of land uses including Low Impact Industry, General Industry and Centre uses. The Redlands Business Park at German Church Road will provide for a mix of uses and a range of lot sizes including light industrial, general service and compatible indoor recreational activities serving the new and expanding residential areas of the southern part of the City and the Southern Moreton Bay Islands. The structure plan for the Redlands Business Park includes a general industry zone, a low impact industry zone and habitat area.

Out-of-Centre Development

- Out-of-centre development is strongly discouraged, although developments such as large format ('bulky goods', 'big box' or 'category based') retail stores on stand-alone sites may be considered acceptable if and only when a net community benefit can be clearly established (over and above a centre / near centre location).

- Opportunity is provided through the Redlands Planning Scheme for the establishment of large format ('bulky goods', 'big box' or 'category based') retailing at the edge of the City's major activity centres. Specifically, large format commercial and retail activity is encouraged to occur in the following locations:
  - within the area included in the Commercial Industry Zone adjoining Capalaba Principal Activity Centre to the east and south-east; and
  - within the area included in the Commercial Industry zone adjoining the Cleveland Principal Activity Centre to the west.

- It is considered that Redland City Council, through planning and infrastructure controls, should provide for a managed, supply-led approach to large format commercial and retail activity consistent with identified demand. This requires forward forecasting and the provision of supply well ahead of anticipated demand to ensure that the general direction of large format retail and commercial development is appropriately contained at or peripheral to activity centres.

Centre Strategies

Consistent with the principles and objectives of the South East Queensland Regional Plan, planning for the growth and development of Redland City's activity centres should be framed to encourage and facilitate the growth and consolidation of retail and commercial activity in centres which maximise their accessibility to deliver the best employment outcomes for Redland City. With this in mind, the Centres and Employment Review contains a suite of recommended actions which sit within the following seven strategic activity areas:

1. Strategic Framework and Centres Hierarchy
2. Activity Centres Place Management and Economic Vitality Strategies
3. Investment Attraction to Promote and Facilitate Knowledge-based Industries
4. Integrated Employment Areas

5. Establish and Monitor Centres' Development Capacity
6. Monitor Progress against Employment Targets
7. Out-of-Centre Development

It is considered that the recommended actions be incorporated into Redland City Council's planning policy to facilitate centres planning and development and the economic development of the City over the twenty-five year period to 2031.

1 Introduction

1.1 Background and Purpose of this Report

This report presents the findings of a review of the Redland Shire Centres Study, which was prepared by Urbis on behalf of Redland Shire Council in August 2001. The 2001 Centres Study was prepared in recognition of the significant role that a centres strategy can have in terms of influencing urban form, transportation patterns, employment generation, accessibility, economic development and a sense of community. The extent and locations of activity centres determined by the 2001 study was based on a planning horizon of 2016 and the urban form proposed for Redland Shire at the time. The Centres Study findings have since been reflected within the provisions and preferred settlement pattern of the Redlands Planning Scheme (RPS), which took effect on 30th March 2006. Figure 1 shows the designation of Activity Centres according to the March 2006 RPS.

In the time since Council adopted the recommendations of the 2001 Centres Study, socio-economic trends and changes, developments in the scale and pattern of urban development, the evolving roles and functions of activity centres, changing retail trends, development pressures in some parts of the City, local and regional policy developments and anticipated population growth have all influenced Council's decision to revise and update the study.

Perhaps the policy development of greatest impact and influence in recent years came with the March 2005 release of the State Government's South East Queensland Regional Plan (SEQRP). The SEQRP, which is designed to guide the pattern of growth and development in the SEQ region, is unprecedented by virtue of its statutory powers. These powers include the requirement of all Local Government Authorities to help implement the Plan through the alignment of local plans and policies. The SEQ Regional Plan is currently under review.[3]

1.2 Aim of the Centres Study Review

Central to the SEQ Regional Plan is a requirement on the part of all Councils to identify and plan for accessible and convenient activity centres close to residential areas, employment locations and transport. In reviewing and updating the Redland Shire Centres Study in light of recent socio-economic changes and developments in Redlands and projections for growth to the year 2031, this report directly informs Redland City's land use planning policy and its input to the SEQ Regional Plan review. This includes the identification of intervention measures or strategies that Council could employ to support and reinforce the roles of the City's identified Major Activity Centres and to prepare policies for addressing out-of-centre development.

[3] At the time of writing, the SEQRP was under review. The *Draft South East Queensland Regional Plan 2009-2031* was released for public consultation for the period December 2008 to April 2009, with an updated SEQ Regional Plan to be finalised by the Queensland Government in July 2009.

In light of the socio-economic and policy developments referred to above, it is a requirement that this Centres and Employment Review give due consideration to the contents and recommendations of the SEQRP as it applies to activity centres and to Redland City's place in the regional economy. The SEQRP identifies Capalaba and Cleveland as Principal Activity Centres (PACs). The intent of PACs under the Regional Plan is to provide key focal points of regional employment and in-centre residential development. The review and update of the Centres Study also includes a strategic assessment of the capacity of these two identified PACs to perform their intended functions as articulated by the Regional Plan. This includes a broad assessment of land availability and infrastructure capacity in the two Principal Activity Centres.

In summary, in order to inform and guide Council policy with respect to the City's network of activity centres, this Centres and Employment Review presents recommendations to Council to encourage an appropriate policy stance and framework which ensures that Redland's activity centres are positioned to deliver the best activity and employment outcomes in the context of the principles and directions of the South East Queensland Regional Plan.

1.3 Activity Centres Defined

The 2001 Centres Study defines activity centres as:

"…an important focus for economic activity and social interaction. Centres encompass a range of uses other than retail and commercial development and often include administrative, tourist, cultural and entertainment activities, transportation nodes, residential uses, community services and supporting industries."

The Study also states that:

"…. a centre is more than a focus on economic activity and employment. A centre is also expected to perform a role in the community it sits within including:

- *retailing and commerce;*
- *social gathering or escape point;*
- *tourism activities;*
- *educational;*
- *culture and entertainment;*
- *sense of place within the urban environment;*
- *a place to live;*
- *passive and active recreation; and*
- *personal services and administration."*

(Redland Shire Centres Study, 2001)

The 2001 Centres Study recognised that centres also can have one or more of the above roles however, it is expected that they should display a collection or agglomeration of these attributes.

Figure 1. Redland City's Activity Centres and Employment Areas

Source: Redland City Council and SGS Economics and Planning, 2008

Despite evolving retail and activity centre trends that have been apparent over the past five years or so, what is described above is consistent with current day definitions. The life of a community is largely expressed through its activity centres. The familiarities which once characterised the relationship between traders and customers may have weakened under the pressures and affects of 'globalisation' and societal trends (e.g. mass merchandising, franchising, changing family structures, new technologies, changing government practices in service delivery, industry restructuring, changing work practices, evolving social values and the faster pace of life) but residents still identify strongly with (and value) their local activity centres. They also value proximity to their larger regional centres and their metropolitan CBD, and the 'liveability' and investment appeal of any place is still highly rated against its proximity or accessibility to the urban core.

It should be emphasised (and reflected in policy) that activity centres are not just dispensers of retail goods and services. They are also community meeting places, centres of community and government services, locations for education and employment, settings for recreation, leisure and entertainment activities, and places for living through new forms of higher density housing in mixed land use settings.

By providing identifiable locations for social, cultural and economic interaction and exchange, well planned activity centres display a strong 'sense of place' and provide a focus for community life and association. They are socially and culturally vibrant places that offer ongoing employment and business opportunities for the local community. They attract visitors and they encourage investment. When well-served by public transport (including pedestrian and bicycle networks) and located in proximity to other 'networked' activity centres which complement their role and function, they also contribute to greater environmental sustainability.

The relationship between residential areas and local employment opportunities, the accessibility of advanced business services to commercial and industrial enterprises and the levels of accessibility on major commuter and freight transportation routes will have a significant bearing on commercial connectivity and the 'cost of doing business' in any local economy. To this end, accessible, networked and multi-purpose in function with the appropriate scale of business, government and community services and facilities, Redland's activity centres will contribute to regional prosperity and therefore, to the underlying principles of the SEQ Regional Plan.

1.4 Structure of this Report

In reviewing and updating the 2001 Centres Study, this report is presented as follows:

- Section 1 (this section) provides an introduction describing the background to and purpose of the review, including a definition of activity centres for the purpose of this study;
- Section 2 considers local policies and strategies that influence and inform centres planning in Redland City;
- Section 3 provides an overview of the 2005 South East Queensland Regional Plan as it relates to centres planning and development in Redland City;
- Section 4 provides an overview of retail and commercial land use trends which impact upon the roles and functions of activity centres in Redland City;
- Section 5 assesses Redland City's changing population and evolving economy;
- Section 6 builds on the previous section by presenting employment and employment land forecasts for Redland City to 2031, including 'in-centre' employment demand to 2031; and
- Section 7 presents study conclusions with respect to the implications for planning and recommendations for centre strategies and interventions on the part of Council. This includes recommendations for dealing with out-of-centre development.

2 Informing the Centres Study Review: the Local Policy Environment

2.1 Corporate Plan

2.1.1 The Vision for Redlands

Council's Corporate Plan (2006 – 2010) identifies strong population growth as the single most important issue for the future development of the City. Finding ways to balance population growth and the resulting need for housing, employment, infrastructure and services with Redlands' enviable quality of life is considered a key challenge for Council.

The Corporate Plan is Redland's strategic compass. It translates and details the proposed direction which Council will take in order to meet the present and future needs of the community. The Corporate Plan articulates a clear vision and the values and principles pertinent to how Council will operate and make decisions. Council's vision is *"enhancing community lifestyle and the natural environment."* This 2006-2010 Plan progresses and improves on the superseded 2002 – 2006 Corporate Plan as it was considered that the vision and strategic priorities remained substantially relevant.

A strong emphasis of the Corporate Plan is on implementing sustainable development at a local level that ensures a basic quality of life for everyone, now and in the future. Economic growth is closely related to sustainability and is also a major focus of the Corporate Plan which aims to encourage more employment and business opportunities in Redlands. At the same time it is considered that economic development should be consistent with Redlands' coastal character, lifestyle and environmental values. A clear commitment is made to sustainable forms of development as an underlying principle for growth.

2.1.2 Strategic Priorities

The Corporate Plan highlights nine Strategic Priorities that are envisaged to help achieve the desired objectives of the Plan and they include:

1. **Natural Environment:** Ensure the enhancement of biodiversity including koala habitat, bushland, greenspace, waterways, catchments, air and coastal ecosystem in recognition of Redland's unique location on Moreton Bay.
2. **Physical Character:** Preserve a balance with rural, bushland, village, coastal and island character of the Redlands by managing growth.
3. **Essential Services:** Provides and maintains water, waste services, roads, drainage and support the provision of transport & waterway infrastructure.
4. **Community Health and Wellbeing:** Build safe, strong and self reliant communities with access to community services, infrastructure and opportunities for participation in community life.

5. **Economic Growth:** Enhance employment participation and the community's standard of living through encouraging economic development opportunities.
6. **Organisational Leadership:** To provide effective organisational leadership through strategic planning and accountable and ethical standards of practice.
7. **Financial Management:** Ensure the long-term financial viability of the shire & provide public accountability in financial management.
8. **Knowledge Management:** Increase and protect the intellectual capital of the organisation and the community through developing a knowledge management framework and a learning framework.
9. **People Management:** Ensure the development of an organisational culture and capability through effective people management programs.

Implications for Centres Planning and Development in Redland City

The Corporate Plan recognises the importance of the location and form of future development to maintaining the balance between development and the natural character of the Redlands through managing growth within a planned urban footprint, consistent with community identity and character.

Council's vision of promoting economic development while sustaining the City's lifestyle and environmental attributes is supported by the Desired Environmental Outcomes (DEOs) of the Redlands Planning Scheme (March 2006).

2.2 Redlands Planning Scheme

2.2.1 Purpose

The Redlands Planning Scheme (March 2006) provides a framework for managing development in a way that advances the purpose of the Integrated Planning Act 1997 to seek to achieve ecological sustainability. The Planning Scheme identifies overarching Desired Environmental Outcomes for Redlands.

The Planning Scheme's Desired Environmental Outcomes (DEOs) collectively seek to achieve ecological sustainability as defined under the Integrated Planning Act. Furthermore each of the DEOs are sought to be achieved or at the very least not compromised.

2.2.2 Desired Environmental Outcomes

The Redlands Planning Scheme (RPS) includes six overarching Desired Environmental Outcomes which relate to:

- Natural Environment;
- Character and Identity;
- Community Health and Wellbeing;

- Access and Mobility;
- Essential Services; and
- Economic Development.

The Scheme's DRO for Economic Development places strong emphasis on a diverse, dynamic and sustainable economy with increasing levels of employment opportunities. The RPS further highlights eight broad directives that will facilitate the successful outcomes of the DEO of economic development, in particular, it makes mention of a network of multi-purpose centres. This is consistent with the findings and recommendations of the 2001 Redland Shire Centres Study.

2.2.3 Activity Centres Hierarchy

The activity centres hierarchy as presented in the RPS is partly informed by the 2001 Centres Study, which aims to encourage the development of centres in accordance with a functional network that distinguishes individual centres from one another on the basis of a centres matrix.

The Planning Scheme describes a network of multi-purpose centres according to the following hierarchy:

- Major Centres;
- District Centres;
- Neighbourhood Centres;
- Southern Moreton Bay Island Centres;
- Point Lookout Centre; and
- Local Centres.

Capalaba and Cleveland activity centres are recognised as Principal Activity Centres under the South East Queensland Regional Plan and together with Victoria Point are located within the Major Centre Zone of the Redlands Planning Scheme.

Birkdale and Alexandra Hills are recognised as District Centres. Wellington Point, Redland Bay, Mount Cotton Village, Colburn Avenue Victoria Point and Dunwich are acknowledged by the RPS as Neighbourhood Centres. Russell, Macleay and Lamb Island centres are recognised as the higher order centres on the Southern Moreton Bay Islands [SMBI] through the SMBI Centre zone. A number of local centres are identified throughout the Redlands in line with local community needs.

2.2.4 Planning Scheme Centres Strategy

The strategic framework as outlined in the Redlands Planning Scheme reflects the Desired Environmental Outcomes, summarising the approach that will be taken to achieve each DEO. The framework provides a summary of Shire-wide and local strategies that apply to particular areas within Redlands. The broad strategies represent major policy initiatives that are considered necessary to advance ecological sustainability. The strategies address issues concerning:

- Urban Settlement Pattern and Population Growth;

- Residential Development;
- Centres;
- Business and Industry;
- Rural Areas;
- Natural Environment;
- Recreation and Open Space;
- Cultural Heritage;
- Environmental Management and Hazard Planning;
- Community and Social Development;
- Transport; and
- Infrastructure.

The Planning Scheme Centres Strategy aims to encourage the development of centres in accordance with a functional network that distinguishes individual centres from one another on the basis of a centres matrix. This approach is informed by the 2001 Centres Study which articulated the centres matrix.

The South East Queensland Regional Plan recognises both Capalaba and Cleveland as Principal Activity Centres which service catchments of regional significance. The Planning Scheme also recognises the role and function of the Cleveland and Capalaba Centres as Principal Activity Centres through the Major Centre zone and its sub-areas. Victoria Point is also included in the Major Centre Zone of the RPS to recognise its significance for the southern areas of the Shire.

Capalaba Principal Activity Centre

Capalaba is the Redlands' primary retail and commercial centre with a catchment greater than 50,000 people and includes:

- discount department store/s;
- supermarkets;
- a full range of specialty stores;
- commercial premises; and
- retail warehousing.

Capalaba is planned to become a mixed-use transit orientated community through amenity improvements, development of residential mixed-use development consistent with the character of the centre as well as the provision of direct access to the eastern busway, which is currently being developed. It also provides entertainment facilities such as cinemas, nightclubs, restaurants and bowling alleys.

Cleveland Principal Activity Centre

Recognised as the Redlands' primary administrative centre, Cleveland is home to the local authority administrative headquarters (i.e. Redland City Council) and State government services. Cleveland has developed as one of two secondary retail and commercial major centres with a catchment of less than 50,000 people. Some of the services and activities within the area include:

- one (1) discount department store;
- supermarkets;
- specialty stores; and
- commercial premises.

In addition, it is recognised as a centre for performing arts, galleries, and restaurants. This is supported by the unique sense of place offered by Cleveland with its waterfront location, its 'gateway' function for tourists and day-trippers travelling to Stradbroke Island and other activities on Moreton Bay, and the centre's pedestrian-friendly, village-style streetscape.

Victoria Point Major Centre

Victoria Point is a third tier administrative centre that provides similar services and activities to Cleveland and includes branch library services and is intended to include local government shop front services.

Victoria Point is well located to serve the growing population of Victoria Point and Redland Bay, and perhaps to a lesser extent, Thornlands. Victoria Point includes entertainment facilities such as cinemas and restaurants serving a catchment of less than 50,000 people.
Some of the services and activities within Victoria Point include:

- one (1) discount department store;

- supermarkets;
- specialty stores; and
- commercial activities.

Victoria Point provides a public transport interchange and has high accessibility by private transport with driving time generally less than 15 minutes to its catchment.

Victoria Point also provides tourist information, particularly relating to the southern sections of the City.

Birkdale and Alexandra Hills District Centres

Birkdale and Alexandra Hills are District Centres which provide for the commercial and weekly retail needs of surrounding district catchment populations of approximately 15,000 persons. District centres include full-line supermarkets, discount department stores, specialty stores, commercial activities and community services on land included within the District Centre zone of the RPS.

Birkdale District Centre provides for the weekly retail needs of Birkdale, Thorneside and northern Wellington Point. Similarly, Alexandra Hills District Centre serves Alexandra Hills and nearby areas of Birkdale and Wellington Point.

Neighbourhood Centres

Neighbourhood Centres are located at Wellington Point, Redland Bay, Mount Cotton Village, Dunwich and Colburn Avenue - Victoria Point. These centres are intended to fulfil a traditional village centre role.

Neighbourhood Centres provide for neighbourhood commercial and convenience retail needs of a catchment population generally up to 10,000 persons, except Mount Cotton Village and Colburn Avenue - Victoria Point where the catchment size is reduced to 5,000 persons to reflect locational circumstances. Retail and commercial activity within these centres is to encompass mini-markets, specialty shops and limited commercial premises on land included in the Neighbourhood Centre zone of the RPS. According to the RPS, full-line supermarkets (typically of a size of around 3,000 square metres of gross floor area or more) are inconsistent with the intended role and function of these centres and accordingly are not considered appropriate. However, the RPS provides opportunity for larger retail activities (of greater than 1,000 square metres of gross floor area in size) such as full-line supermarkets to be considered within neighbourhood centres subject to demonstrated demand from the local catchments they are intended to serve and demonstration of no adverse economic and social impact on the established role and function of the City's centres.

Southern Moreton Bay Island [SMBI] Centres

The Redlands Planning Scheme identifies the principal centres for the SMBIs on Russell, Macleay and Lamb Islands. These centres are located near existing ferry terminals providing convenient access to a variety of compatible commercial, retail and service commercial uses for island residents, visitors and tourists on land included within the SMBI Centre zone of the RPS.

Point Lookout Centre

The Point Lookout Centre fulfils a mixed use function, including retail, commercial and tourism uses with specific design controls aimed at protecting the unique coastal village character of the centre.

Local Centres

Local centres are located across the City at various locations providing convenience shopping for the day-to-day needs of local residents.

Local centres typically perform convenience retail functions to meet the day-to-day needs of local residents. These centres provide a gross floor area of 1,000 to 2,000 square metres for local centre uses. They can comprise a mix of specialty stores (such as bakeries, milk bars, newsagents, etc.) and in some cases a limited line local supermarket on land included within the Local Centre zone of the RPS.

2.2.5 Redland City's Emerging Communities

Under the Redlands Planning Scheme, the Emerging Urban Community Zone has been established to identify and ensure the sustainable integration of planning and development for the growth areas located within this zone.

The emerging communities identified under the RPS include:

- South East Thornlands;
- Kinross Road, Thornlands;
- South Bunker Road, Victoria Point;
- South West Point Lookout township, North Stradbroke Island; and
- North Dunwich Township, North Stradbroke Island.

In addition, the draft SEQRP identifies an area south of Redland Bay as an Identified Growth Area. This draft SEQRP land category identifies areas across the SEQ region to be considered for future urban development subject to extensive investigations. This area is included in the Regional Landscape and Rural Production regional land use designation providing protection from premature and inappropriate development prior to extensive investigations taking place.

No growth areas are specifically mentioned in the 2001 Centres Study. However, the 2001 report does make reference to new residential growth areas to be supported and serviced by convenience store/s and local shopping centres. For each of the growth areas identified above, a structure plan is to be completed in accordance with the Planning Scheme and SEQ Regional Plan. The structure plans will inform issues and constraints, identify areas and subsequent determination of land uses and associated infrastructure.

Implications for Centres Planning and Development in Redland City

According to the 2001 Redland Shire Centres Study, the centres hierarchy consists of the following:

- Major Centres – Capalaba and Cleveland.
- District Centres – Alexandra Hills, Birkdale and Victoria Point.
- Local Shopping Centres – Mainland, Southern Moreton Bay Islands, North Stradbroke Island.

The 2001 Centres Study hierarchy differs slightly to that contained in the Redlands Planning Scheme. This is to be expected given recent and anticipated population growth and development, particularly in the southern part of Redlands, which may not have been accounted for when the 2001 Study was prepared.

As noted above, the RPS recognises the Principal Activity Centres of the SEQ Regional Plan within the City's Major Centres Zone. This includes Capalaba and Cleveland. This is reflected in the 2001 Centres Study. As shown above, the RPS also includes the Victoria Point centre within the Major Centre zone. This is not reflected in the 2001 Centres Study which recognises Victoria Point as a District Centre. Given the recent and forecast population growth in and around Victoria Point (see Section 5.3 of this review), it is considered appropriate that centres planning be revised to recognise Victoria Point as a Major Centre, as provided in the RPS. Further supporting designation of the Victoria Point centre as a Major Centre is its accommodation of key concentrations of employment, government administration, entertainment facilities, potential for residential intensification on adjacent lands and high accessibility to the regional public transport network. This should be reflected in the SEQ Regional Plan through designation of the Victoria Point centre as a Major Centre.

Under the 2001 Centres Study, Local and Neighbourhood Centres have the same classification. The March 2006 Redlands Planning Scheme classifies them separately. As a result, the Neighbourhood Centres of Wellington Point, Colburn Avenue, Redland Bay and Mount Cotton Village shown in the RPS are not reflected in the 2001 Centres Study. It is considered appropriate that these centres be acknowledged as Neighbourhood Centres.

Consistent with the provisions of the RPS, it is considered that the bulk of forecast employment growth in Redlands can be accommodated in the City's Major Activity Centre zones of Capalaba and Cleveland and to a lesser degree, Victoria Point. Section 6 of this review documents Redland City's employment forecasts by locality and centre. Victoria Point, serving a catchment of less than 50,000 people, should accommodate the weekly shopping needs of its catchment population.

While a future catchment analysis is beyond the scope of this review, based on the population and employment forecasts, benchmarks regarding centre catchments and information on centres capacity reported in latter sections of this review, it is considered that the Redland Bay Neighbourhood Centre could be 'promoted' in the hierarchy to a District Centre but not until the population threshold necessary to support a District Centre is reached. The RPS states that District Centres serve catchment populations of approximately 15,000 persons. Redland Bay's population is expected to reach 15,000 by the year 2026 and about 16,000 by the year 2031.

2.2.6 Integrated Employment Areas

Thornlands Integrated Employment Investigation Area

The Thornlands Integrated Employment Area is intended to become the pre-eminent economic and enterprise area within the City developing as a sustainable, modern, high quality, structure planned integrated economic and enterprise area providing high levels of local employment to 2031 and beyond. The area is intended to accommodate a range of compatible industries that the City has a competitive and comparative advantage in and are consistent with the image, identity, character of the City. These industries include low impact manufacturing, knowledge and creativity based enterprise, traditional light industrial and general service logistics. The area is also intended to include a retail function directly related to the enterprise uses of the area and accommodate a regional sporting facility. Opportunity for compatible educational uses within the area will also be pursued.

By encouraging the co-location of a range of compatible economic and enterprise uses, integrated employment areas can potentially deliver significant benefits by way of economic clustering, more efficient access to and use of infrastructure and services including community services, retail facilities and other personal and recreational services.

Preliminary investigations undertaken on behalf of Council in June 2005 identified this large site of approximately 550 hectares as potentially suitable for the establishment of a major integrated employment area. Since that time, the Redlands Planning Scheme which came into effect in 2006 has identified and provided for the protection of the Thornlands Integrated Employment Area pending more detailed investigation and structure planning of the area for the establishment of a major integrated employment area. The draft SEQ Regional Plan also proposes the area be protected from inappropriate or premature applications until detailed investigations are undertaken and a structure plan is in place through designation of the area as a Future Growth Area.

Redlands Business Park, Redland Bay

Redland City Council has approved a proposal for the establishment of an integrated employment area at German Church Road in Redland Bay consistent with the adopted Redlands Business Park Structure Plan (October 2007) prepared by Jensen Bowers. The Redlands Business Park is 43.6 hectares in total with approximately 23 net hectares being made available through a structure plan for employment uses to be developed over four stages. An underlying objective of the structure plan is to facilitate opportunities for diverse, dynamic and sustainable employment.

The Redlands Business Park at German Church Road will provide for a mix of uses and a range of lot sizes including light industrial, general service and compatible indoor recreational activities serving the new and expanding residential areas of the southern part of the City and the Southern Moreton Bay Islands. The structure plan for the Redlands Business Park includes a general industry zone, a low impact industry zone and habitat area.

2.3 Redlands Economic Development Strategy

The principles for urban development that are articulated in Redland Shire Council's Corporate Plan and the Desired Environmental Outcomes of the Redlands Planning Scheme are reinforced by the Redlands Economic Development Strategy, which lays out a framework for the City's future economic development. The Economic Development Strategy confirms a desire for growth, but within clearly articulated values.

The Redlands Economic Development Strategy (REDS) aims to provide the direction for Redlands to develop sustainably until 2012. In order to accomplish this it was developed with input of Council, key stakeholders and the business community. The REDS seeks to identify and assess:

- Business and tourism opportunities; and
- Council resources to undertake economic development.

The objectives for Council's strategic priority for economic development include:

- Facilitation of the development of a broad based robust local economy and the marketing of a distinct image for the city;
- Expansion of local business activity through encouraging creativity and entrepreneurial initiatives; and
- Increase the economic contribution of tourism through the promotion of sustainable tourism destinations, infrastructure and products.

Currently 60% of the workforce is employed outside of Redlands. One of Council's key aims is to have 60 per cent of the City's workforce working in Redlands by 2026.

The expressed vision of Council for economic development is a quadruple bottom line approach (Governance, Social, Environment and Economic) to the enhancement of employment participation and community living standards through greater economic development opportunities. This vision is aligned to the mission outlined in Council's Corporate Plan, to work with community for the provision of:

- Leadership, planning and representation;
- Protection and maintenance of the lifestyle and natural environment;
- Community and regulatory services; and
- Infrastructure and facilities.

The goals outlined for economic development are:

- Facilitation of training and development opportunities for Redland City workers and businesses;
- The assistance of local businesses to expand their operations, create more jobs and diversify the economic base;
- To develop and implement Council's Land Use Masterplan, Local Growth Management Strategy and Infrastructure Plans;

- To market the city as an attractive and competitive investment location; and
- The facilitation of Redlands business networking with expert counterparts.

These economic development goals are to be delivered under the following principles:
- Developing our workforce;
- Developing our businesses;
- Developing and optimising our assets;
- Promoting our region and our businesses; and
- Working together for enhanced opportunities and outcomes.

The REDS outlines a vision for Redlands to achieve its potential by becoming an important South East Queensland destination for all high end knowledge workers seeking employment and lifestyle choices, and a key short break destination for intrastate visitors. The vision for growth focuses on maintaining the lifestyle of Redland City, with growth based on innovation in existing industries, developing greater economic diversity and sensitive tourism development. As part of the strategy, Council's intent is to facilitate and support the sustainable development of a dynamic and diverse local economy offering meaningful employment opportunities for the City's residents.

Council's vision for local economic development is supported by regional policy documents, most notably SouthROC's Economic Vision Statement. SouthROC's economic vision for the region is to develop a competitive and diverse economy while maintaining the quality of life for its residents. The economic sectors that are recognised as being key to the region's future include knowledge based businesses (and more knowledge intensive applications to existing industries), skills and learning, tourism, creative industries and food and beverage manufacturing.

Implications for Centres Planning and Development in Redland City

From a centres planning perspective, Redland City Council can facilitate the development of knowledge-based industries in sectors like professional business services, cultural and creative industries, recreation, leisure and entertainment, personal services, health and education by providing the appropriate planning framework which will encourage growth and consolidation of appropriate uses in the City's Major Activity Centres.

A key implication for planning of 'knowledge economy' growth and development is that, compared to years gone by, a much larger proportion of essential business inputs, particularly business services (from financial and legal services to branding & packaging, business planning and communications & IT) are outsourced to external specialist providers. This has implications for the demand on employment lands as producers focus on their core business only and as a result are more likely to require less space to house their employees than previously. With the growth in the number of smaller, specialist business service providers, there is a greater demand for space that suits their needs and that of their employees, either in the home office or in more mixed use, multi-purpose commercial settings. Local planning provisions need to account for these trends. This includes the development and delivery of appropriate policy signals regarding the growing number of home-based business activities throughout Queensland.

3 Informing the Centres Study Review: The South East Queensland Regional Plan

3.1 Purpose

As stated in the introduction to this review, the regional policy development of greatest influence on South East Queensland's settlement pattern and ultimate urban form is the South East Queensland Regional Plan. The Queensland Government, through the Office of Urban Management (OUM) released the South East Queensland Regional Plan (SEQRP) in March 2005 to guide the pattern of growth and development in one of Australia's fastest growing regions over the next 25 years. The Regional Plan is unprecedented in Queensland by the virtues of its statutory powers. It will have wide ranging impacts and influence the future growth of South East Queensland through the realisation of its regulatory provisions and the amendment and alignment of Local Government Planning Schemes with State plans and policies. The Plan is currently under review and the *Draft South East Queensland Regional Plan 2009-2031* was released in December 2008 for public comment. The Plan will be finalised in July 2009.

According to the Plan generally, the provision of low-density detached houses on the urban fringes will no longer be applicable due to the changing structure of households and the region's forecast population needs. In terms of providing urban services, the provision of new dwellings in locations that are in close proximity to existing infrastructure and services will be far more sustainable. Likewise, ensuring that greenfield development uses land as efficiently as possible will aid in the approach towards sustainability.

There is a strong emphasis in the Plan on consolidating urban development in areas where community services and infrastructure is efficient. Focusing on both higher density and mixed use development in and around activity centres and public transport nodes and corridors will aid in achieving a more compact and connected urban form.

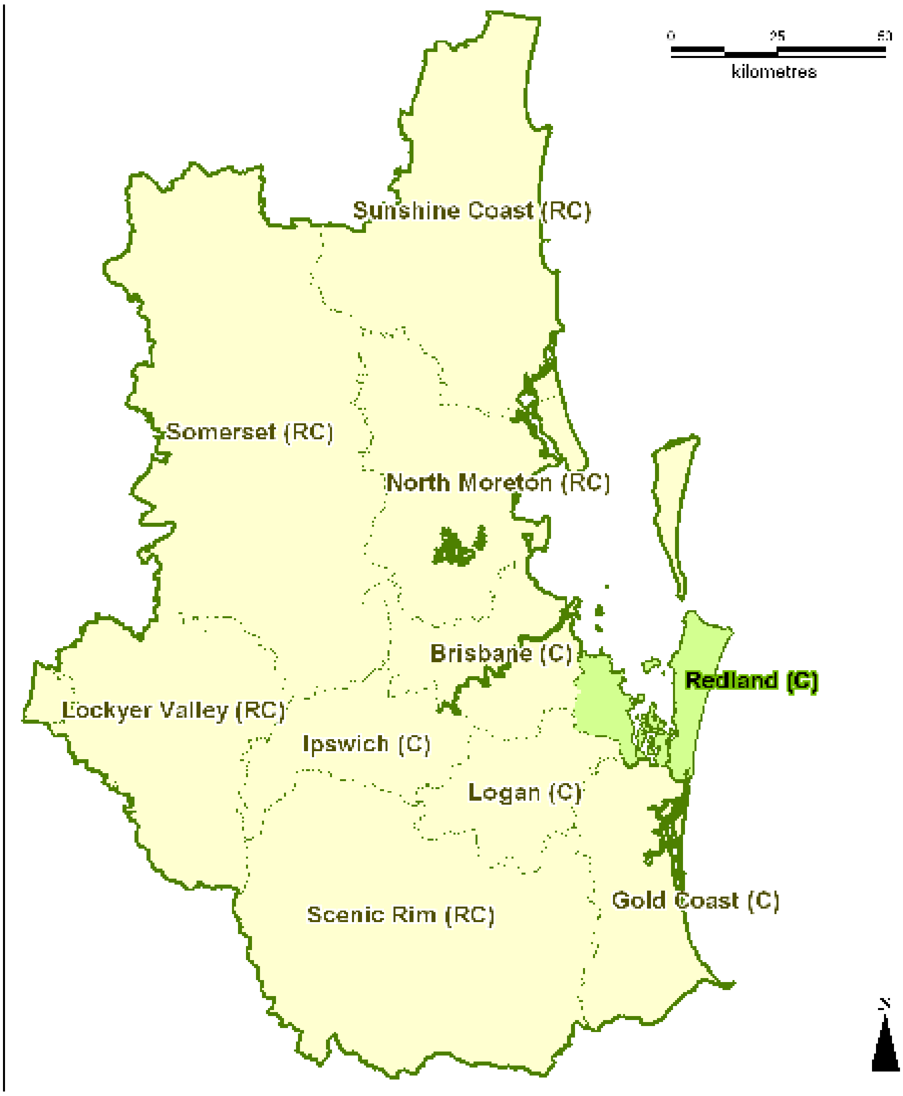
3.2 Desired Regional Outcomes

The Draft SEQRP encapsulates 12 Desired Regional Outcomes (DROs) which include:

1. Sustainability an Climate Change
2. Natural Environment
3. Regional Landscape
4. Natural Resources
5. Rural Futures
6. Strong Communities
7. Engaging Aboriginal and Torres Strait Islander Peoples
8. Smart Growth
9. Economic Development
10. Infrastructure
11. Water Management

12. Integrated Transport

Figure 2. Redland City in the South East Queensland Context



Source: SGS Economics and Planning

3.3 Urban Development – Regional Activity Centres

Each of the Desired Regional Outcomes have a bearing on activity centres planning and development however, the DRO of immediate interest is the DRO of *Smart Growth – Activity Centres and Transit Corridors,* which calls for a compact and sustainable urban pattern of well-planned communities, supported by a network of accessible and convenient centres close to residential areas, employment locations and transport.

Within this strategic outlook, the Regional Plan sets out guiding principles, policies and activities that will help to achieve the Desired Regional Outcomes. Regional Activity Centres are identified under the Plan as significant nodes that have the potential to facilitate economic growth and higher density living. According to the Regional Plan, Activity Centres are defined as *"accessible locations that have concentrated businesses, employment, research, education, services, and higher density residential development serving a regional population"*.

It is envisaged that a successful network of activity centres will provide not only a community focus but will also help to achieve compact, self-contained and diverse communities. For an activity centre to be successful it will need to facilitate efficient public transport systems and provide a focus for government investment in infrastructure and services.

3.3.1 Regional Activity Centres Network

Under the Regional Plan there are five specific classifications of Activity Centres. They are:

- **Primary Activity Centre** – accommodates the largest and most diverse concentration of activities and land uses, i.e. the Brisbane CBD.
- **Principal Activity Centre** – serves catchments of regional significance; accommodates key concentrations of employment and provides a key focal point for regional employment and in-centre residential development; major trip generators serviced by existing or planned public transport services with residential densities of between 40 and 120 dwellings per hectare.
- **Major Activity Centre** – compliments Principal Activity Centres, which serve catchments of sub-regional significance; accommodates key concentrations of employment; provides business and retail functions; secondary sub-regional focus of administration, Major Activity Centres accommodate district or branch offices of government and cultural and entertainment facilities; residential densities of between 30 & 80 dwellings per hectare.
- **Principal Rural Activity Centre** – important service and community hubs in the region's rural areas; supports a sub-regional rural catchment and contains a concentration of rural services, commercial activities, retail, government and community activities.
- **Major Rural Activity Centre** – towns that provide more than one function for the surrounding rural catchment are considered Major Rural Activity Centres and are characterised by retail, commercial, community and some government services.

The Draft SEQRP also makes specific note of South East Queensland's enterprise opportunity areas. The plan supports established areas of economic activity, and identifies and seeks to protect future economic activity and employment areas. The existing and proposed economic activity areas and specialised industry locations are outlined in the Draft SEQRP.

Implications for Centres Planning and Development in Redland City

According to the South East Queensland Regional Plan, Capalaba and Cleveland are designated Principal Activity Centres, the intent being that both centres will provide key focal points of regional employment and in-centre residential development. In a regional context, this gives Capalaba and Cleveland the same status as Upper Mount Gravatt (Garden City), Carindale (Westfield) and Springwood in Logan City. Figure 3 shows the regional activity centres network as described in the South East Queensland Regional Plan.

The 2001 Centres Study makes reference to Capalaba and Cleveland as Major Centres with similar roles and functions as that outlined for these centres in the SEQ Regional Plan. However, as noted above in the previous section of this review, the 2001 Study does not include Victoria Point as a Major Centre. Given the recent and forecast population growth in and around Victoria Point (see Section 5.3 of this review), it is considered appropriate that centres planning be revised to recognise Victoria Point as a Major Centre.

Further supporting designation of the Victoria Point centre as a Major Centre is its accommodation of key concentrations of employment, government administration, entertainment facilities, potential for residential intensification on adjacent lands and high accessibility to the regional public transport network. This should be reflected in the SEQ Regional Plan through designation of the Victoria Point centre as a Major Centre.

In support of the view that Victoria Point be recognised as a Major Centre in the SEQ Regional Plan, Redland City Council prepared a Gross Floor Area (GFA) analysis for the Victoria Point Centre. This was prepared in response to the former Office of Urban Management (OUM) request that further information be provided on key attributes of the Victoria Point centre to support Council's request that it be included as a Major Centre in the SEQ Regional plan consistent with criteria used to assess centres as part of the SEQ Regional Plan.

With the exception of an additional category for 'other services', the output produced in the form of a summary table (refer to Table 18 of this report) matches the categories with those of an additional information request by the former OUM. The table summarises data for total number of premises for each category, total GFA for each category, percentage of space occupied by each category for number of premises and floor space, the total number of premises within the centre along with the total GFA of the centre. It shows that there are a total of 242 premises within the centre and a total GFA of 67,526.5 square metres. Retail occupies the highest percentage of premises at 56.61% and floor space at 66.48%. After retail there are a number of categories that occupy between 8.6-11.16% of the premises in Victoria Point Centre. These categories are Other Services (11.16%), Office (10.33%), Medical Facilities (8.68%) and Cultural and Entertainment (9.09%). Of these categories Cultural and Entertainment occupy the highest percentage of floorspace at 15.6% followed by Other Services (6.61%), Medical Facilities (5.32%) and Office (4.72%).

Victoria Point provides a public transport interchange and has high accessibility by private transport with driving time generally less than 15 minutes to its catchment. Victoria Point also provides tourist information, particularly relating to the southern sections of the City.

3.3.2 Activity Centres Planning Principles

According to Regional Plan, it is envisaged that the designation and categorisation of the various activity centres will create a network of centres which:

- Create economic growth by co-locating a mix of land uses;
- Concentrate goods and services more efficiently;
- Provide appropriate locations for government investment in public transport, health, education, cultural & entertainment facilities;
- Provide a focus for community and social interaction;
- Encourage multi-purpose trips and shorter travel distances to reduce demand for private travel;
- Integrate land use and transport to support walking, cycling and public transport;
- Accommodate higher density residential development, employment and trip-generating activities.

The 2001 Redland Shire Centres Study identifies the following planning principles, which are designed to provide the basis for planning instrument and non-statutory recommendations to be developed:

- **Diversity** – create centres of activity for a range of uses;
- **Flexibility** – ensure the provision of flexibility with respect to future planning of centres;
- **Vibrant and Vital** – create centres that are vibrant and vital;
- **Design** – provide/create centres that are designed appropriately;
- **Linkages** – within and between centres and surrounding areas;
- **Economic Functioning** – recognise that some centres have an important economic function; and
- **Environmental** – incorporate the principles of environmentally sustainable development.

Implications for Centres Planning and Development in Redland City

Centres planning must ensure that provisions are put in place to encourage the growth and consolidation of employment in the City's multi-purpose activity centres. With reference to the planning principles described above, it is considered that those outlined in the 2001 Study remain valid subject to some minor refinement to better reflect recent and forecast socio-economic trends (see Section 5 of this review) and to explicitly acknowledge the centres planning principles as presented in the Draft SEQ Regional Plan. Having regard for these socio-economic and policy developments, Section 7 of this review re-articulates Redland City's activity centres planning principles.

3.3.3 Managing Out-of-Centre Development

It should be acknowledged that out-of-centre development is inconsistent with the intent of the Regional Plan as it has the potential to reduce activity centre vitality and detract from economic growth. In some circumstances, it may not always be appropriate for certain developments to be located within designated centres. Under this scenario, development that is out-of-centre needs to be assessed on the basis of 'community need' and for its potential impacts on the:

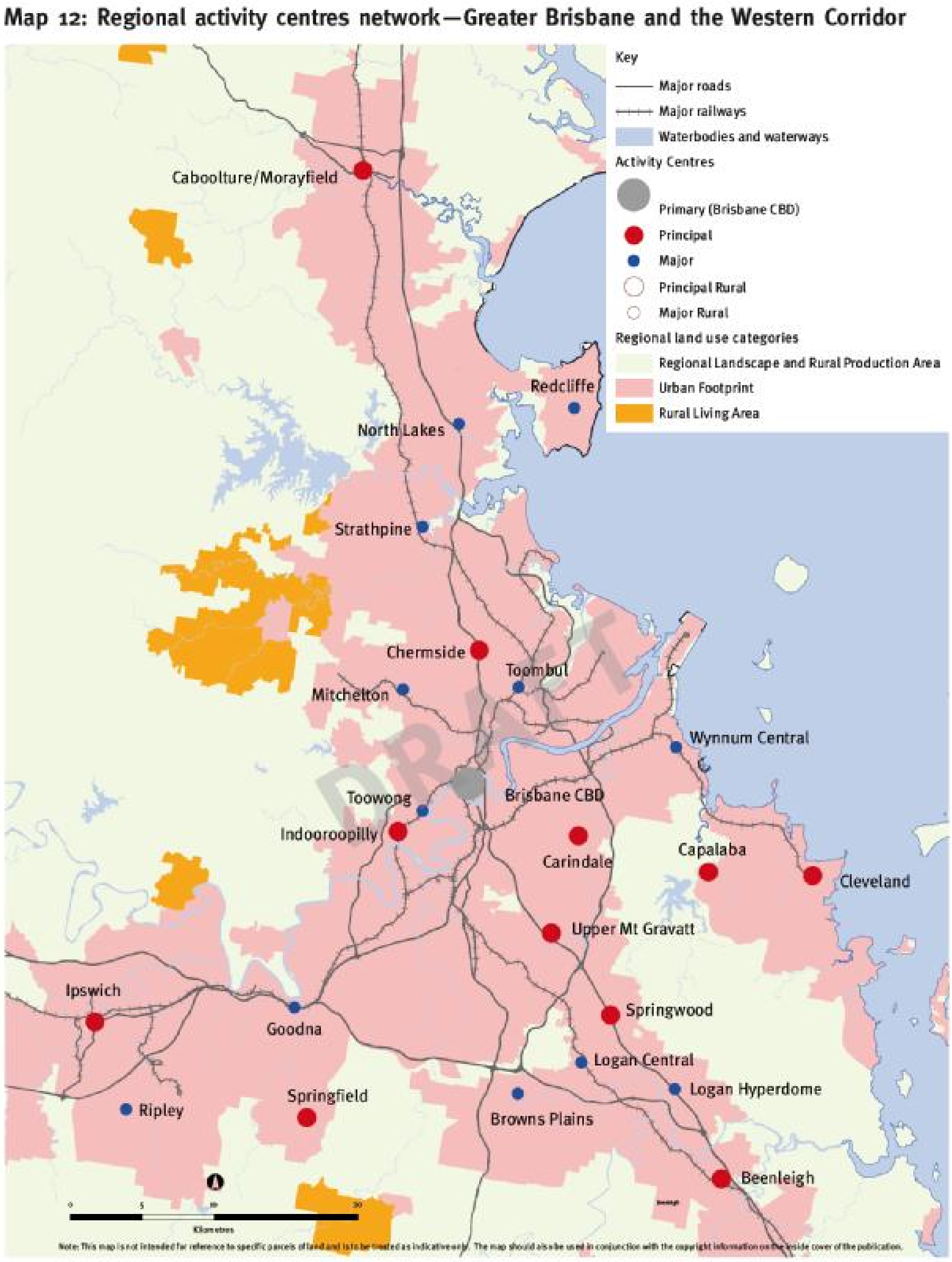
- primacy and functionality of surrounding centres;
- maintenance of pedestrian convenience and transport system efficiency; and
- amenity of surrounding residential neighbourhoods.

In making amendments and alignments to strategic documents and policies, government bodies need to address measures that support and reinforce the roles of activity centres. In particular, Local Governments need to identify activity centre boundaries and determine the extent of future growth that each centre will accommodate, including residential development opportunities.

Redland City, with its forecast rate of population growth, will likely face continuing pressure from the development industry for retail and commercial development on standalone sites that are out-of-centre and which, if developed could adversely impact upon the City's prospects for a more compact and connected urban form in future. Such ad hoc development could also have a potentially detrimental impact on the economic performance of the City's activity centres. They could also potentially divert investment, services and employment away from the City's centres. Out-of-centre development should therefore be discouraged by Redland City Council.

For activities which, by their nature, cannot locate within centres (such as big box retailing – see Section 4 below), development at the edge of activity centres should be encouraged so that the objectives of a compact and connected urban form can be maintained.

Figure 3. SEQ Metropolitan Activity Centres Network



Source: Draft South East Queensland Regional Plan 2009-2031, December 2008

3.3.4 Integrated Land Use and Transport Planning

The integration of land use, transport and employment is seen as key in achieving social, economic and environmental sustainability. In particular, this notion of Transit Orientated Development (TOD) is seen as very relevant to Activity Centres. The SEQ Regional Plan defines TODs as mixed use residential and employment areas designed to maximise the efficient use of land through high levels of access to public transport. One of the main focuses of TODs is to create a conducive environment for walking and cycling that is in close proximity to a transport corridor that is surrounded by high density residential development and a range of mix uses.

According to the Draft SEQRP, prerequisites for transit oriented development areas include the following:

- they are or will be serviced by quality and high-frequency public transport;
- they have the capacity for development density and intensity levels to support public transport; and
- they can provide a vital and active, pedestrian-friendly, walkable catchment that is centred around a public transport node or corridor.

Transit oriented development will vary in size, related to pedestrian accessibility – generally within a 10-minute walk of a transit node or 600-800 metres. Then plan states that local governments should be using the transit oriented development location principles in their areas when preparing local planning strategies, and planning schemes and amendments.

Implications for Centres Planning and Development in Redland City

The 2001 Centres Study makes mention of co-locating major centres (Capalaba & Cleveland) within walking distance of major transport corridors. However, it makes limited reference to the integration of Transit Orientated Developments (TODs). The SEQ Regional Plan identifies Cleveland as a TOD. This needs to be reflected in Council's centres planning framework.

3.4 Economic Development

3.4.1 Employment and Economic Activity Areas

DRO 9 of the Draft SEQ Regional Plan states that *"a strong, resilient and diversified economy grows prosperity in the region by using its competitive advantages to deliver exports, investment, and sustainable and accessible jobs"*.

A key economic development planning principle (9.1) of the Draft SEQRP is to *"develop a diversified regional economy characterised by innovative, high value-added industries that build on existing regional and sub-regional competitive advantages and specialisations"*. Specific policies contained in the Plan include a desire to refine and implement sub-regional economic development strategies that provide employment opportunities, deliver high value-added jobs and build knowledge-based industries.

According to the Regional Plan, regional activity centres along with transit oriented communities and mixed use developments have the potential to provide opportunity for the creation of employment in South East Queensland. This key principle is aimed at maximising job creation and employment diversity in centres of economic activity, including activity centres, major industrial areas, mixed-use developments and knowledge precincts.

Implications for Centres Planning and Development in Redland City

For Redland City, activity centre planning should be framed to help facilitate the development of an increasingly diverse local economy based on the establishment and growth of new 'knowledge-based' industries with a genuine presence or potential in Redland City. This would include for example, professional business services, health care, education and the cultural and creative industries.

It is considered that the planning principles articulated in the 2001 Centres Study could be developed further to highlight the relationship between the City's activity centres and knowledge-based industries and how the former can effectively facilitate the growth and development of the latter for the benefit of the Redland City community. This includes meeting the objective to increase the City's rate of employment self-sufficiency from its current 52% to a target of 60% by 2031.

3.5 Regional Planning Policies

3.5.1 Activity Centres

Strategic policies and programs of the Regional Plan that are relevant to activity centres planning in Redland City are:

- 8.5.1: Locate major employment and trip-generating activities in activity centres and on the high-frequency, priority public transport network.
- 8.5.2: Ensure that new state government health, education, justice, community and administrative facilities, and employment activities are located within regional activity centres on the high-frequency, priority public transport network.
- 8.5.3: Exclude out-of-centre land use and development that would detrimentally impact on regional activity.
- 8.5.4: Ensure optimal utilisation of transport and service availability in activity centres and corridors by delivering appropriate residential densities and maximising business location opportunities.
- 8.5.5: Prepare detailed master plans for regional activity centres to guide land use, transport, quality urban design and public spaces.

- 8.5.6: Review planning schemes to encourage mixed use development along the high-frequency, priority public transport network.

3.5.2 Integrated Land Use and Transport Planning

Strategic policies under the principle of Integrated Land Use and Transport Planning that are pertinent to Activity Centres are:

- 8.8.6: Apply transit oriented development approaches to the planning and development of designated locations in accordance with the transit oriented development principles for SEQ, having regard to local circumstances and character.
- 8.8.7: Manage car parking provision in regional Activity Centres and high capacity transport nodes to support walking, cycling and public transport accessibility.
- 8.8.8: Ensure all new development within walking distance of a transit node or regional Activity Centre maximises pedestrian amenity, connectivity and safety.

Implications for Centres Planning and Development in Redland City

Consideration of these planning principles and policies are critical for informing the Redland City Centres and Employment Review and its contribution to the review and implementation of the South East Queensland Regional Plan.

4 Planning Context - Changing Retail / Commercial Trends and Land Uses

4.1 The Importance of Retailing

As highlighted in the introduction to this review, communities identify strongly with (and value) their activity centres. Importantly, activity centres are not just dispensers of retail goods and services. They are also community meeting places, centres of community and government services, locations for education and employment, settings for recreation, leisure and entertainment, and places for living through new forms of higher density housing in mixed land use settings. By providing identifiable locations for social, cultural and economic interaction and exchange, well planned activity centres display a strong 'sense of place' (something people value highly) and provide a focus for community life and association. Consistent with the arguments put forward in the 2001 Redland Shire Centres Study, activity centres will only work effectively (socially, culturally, economically and environmentally) if they perform a multitude of functions.

Having said that, retailing remains a key component of any activity centre and, with the exception of specialist activity centres that may be anchored by a health, research or education institution for example, the retail 'offer' is more often than not the primary reason for residents and visitors to patronise the centre. Therefore, the basic 'building block' of an activity centre network and hierarchy is in most cases retail activity. Centres that generate a 'large' number of retail visits from a 'large' catchment are well placed to accommodate other regional scale activities such as community services and other commercial activities. This is because retailing generates a large number of trips for a variety of purposes (from daily, weekly and more infrequent purposes). This enables other land uses to co-locate with retailing and thus generate co-location benefits. This includes the ability to undertake multi-purpose trips (e.g. shopping plus entertainment plus business in the one location) and share common infrastructure (e.g. public transport, open space and parking).

The following are some pertinent retail and commercial trends which are affecting the form and functions of activity centres around Australia.

4.2 The Evolution of Retailing

Powerful social and economic trends are affecting the way people use their local retail and commercial centres and the sorts of retail services and facilities they seek. These trends include the growth in convenience retailing, the re-emergence of the traditional strip retail centre and the continued growth of the 'café society'. Another important form of retailing impacting on activity centre (and other commercial / industrial) land use requirements, and which has gained a significant share of the market in recent years, is the large format, stand-alone category-based form of retailing, often referred to as 'bulky goods' retailing. These retail trends are described below.

4.2.1 The Evolution of Supermarkets

Supermarkets have captured a large share of the growth in retail expenditure in recent times. They have broadened the range of goods on offer and are taking on a 'mini-centre' role within shopping centres. They have included specialist activity nodes within their floorspace – butcher, baker, greengrocer, delicatessen and are now including banking and post office activities. For example, Woolworths has developed petrol outlets as an associated use after entering into an agreement with Caltex to establish this type of retail facility. Coles-Myer has a similar arrangement with Shell. And the breadth of retail services available through the (now much larger and more sophisticated corner petrol station) continues to deepen with the exclusive arrangements now being struck with banks to locate their ATMs in these 'convenience store petrol stations' (for example ANZ ATMs in Caltex service stations). And in addition to the standard full-line supermarket (typically of say, 3,000 to 4,000 square metres in size) operating as an anchor to district centres, smaller limited line supermarkets like ALDI, IGA and Foodworks for example are also locating in neighbourhood-type centres, while smaller local limited line supermarkets can be found in local centres too. All of this means that people now have a much wider choice of options to shop for their daily convenience needs at all hours of the day or night.

4.2.2 The Importance of Convenience

Further to the previous point, consumers are showing a greater demand for convenience shopping and less loyalty to a particular centre, such as the corner store.

However, the time-conscious convenience shopper will frequent retail and entertainment facilities that can meet their expectations for convenience and familiarity, where they can purchase what they need when they need it with little or no delay. This has led to a large number of dispersed convenience centres and shops which serve an important local function. However, these require careful management (i.e. limited in size and number) to avoid potential adverse impacts on larger centres.

4.2.3 The Continued Growth and Expansion of the Planned Shopping Centre

Centre retailing consists of two main types – the more traditional strip centre (refer below) and the more modern and larger planned shopping Centre (e.g. Centro, Westfield, etc.). These centres are generally anchored by a mix of supermarkets, department stores and discount department stores (DDSs) and also house a usually wide range of specialty shops often dominated by various retail franchises. These centres are often formula based in terms of the retail mix they provide, their layout, etc.

These large, modern retail centres have continued to expand and grow on recent years with many of the large centres getting even larger (witness Chermside in Brisbane or Chadstone in Melbourne for example). They are also diversifying their offer whether it be in retail mix or by way of the type of retail setting (for example, some planned centres now have internal 'main streets' which attempt to replicate the traditional strip centre. While offering significant employment opportunities, the planned shopping centres do not usually offer a diversity of employment choice offered in more traditional centres where a strong office / commercial component is usually evident.

4.2.4 The Fall and Rise of the Traditional Strip Centre

Newer planned regional shopping centres have impacted significantly on the welfare of the traditional strip-type centres, both in the capital cities and in regional centres. One of the advantages that traditional strip centres can offer over the large planned centres is a much greater range of rents and a lower rental base generally, plus an open air, smaller scale environment with more customer recognition than the large planned centres. This allows them to provide many non-national brand retail outlets plus complimentary activities, such as cafes, bars, local business centres (including PO boxes and administrative services). This can enhance their attractiveness as a destination and allow alternative niche positions to be developed. As noted above, the developers of planned neighbourhood and district centres are beginning to replicate the strip centre precinct in response to growing consumer demands for interesting retail experiences that offer a point of difference, no matter what the scale.

4.2.5 Urban Quality as an Investment Attractor

The amenity of a city, suburban or regional centre is important for economic prosperity as it represents one means of attracting new business investment and activity because of the 'address factor' that the centre will retain. Investing in beautification of the public realm represents an appropriate means of encouraging an enhanced range of business and community service sector activities. It is also important for attracting people to work and live in an area. Land use planning, which encourages a well planned and appropriately sequenced scale and timing of retail and commercial development is a critical factor of urban amenity and is important in attracting people to want to live, work and shop in or proximate to a centre.

4.2.6 Large Format, Category-based and 'Big Box' Retailing

These outlets are typically located in low cost buildings in low rent areas. Thus they seek locations away from the main centres in highly accessible (by car), high profile locations such as on major arterials. The major element in this sector are the 'category killers', that is, stores selling many brands of a particular product type at highly competitive prices, warehouse or factory outlets and the general bulky goods stores (e.g. furniture and white goods). Bulky goods are only one component of this retail category and using this term alone is not appropriate. This is because the types of retail goods available from these outlets are both bulky goods (like furniture) and small goods such as screws and nails or small electrical appliances like kettles and toasters.

This sort of activity commands a very large catchment, and in order to achieve economies of scale requires substantial parcels of (more affordable) land offering plenty of parking, usually in greenfield areas in 'out-of-centre' locations. Given the land and space requirements of these large format retail outlets, the term 'big box' retailing is a suitable title. As the population of Redland City and its surrounding region grows, so too will the market for this form of retailing and the demand for (most likely out-of-centre) land that comes with it.

4.2.7 Outdoor, Large Format Retailing

Related to the large format, category-based form of retailing is the relatively recent expansion of outdoor, large site retail activities. These include for example, nurseries and garden supplies centres, timber yards, car, boat, caravan and campervan sales outlets and do-it-yourself (DIY) equipment hire outlets. While this form of retailing has been around for many years, it is only in more recent time that, like the category-based retailing referred to above, they are increasing in size (and therefore, land requirements) in order to serve very large catchments, offering highly competitive prices through the realisation of significant economies of scale.

Give the fact that this form of retailing is often of an ‘industrial nature’ with negative off-site externalities (e.g. noise from timber cutting, smell from fertilizer or dust from soil and sand), it is often more appropriate for these uses to locate in or immediately adjacent to light industrial zones where these adverse impacts can be minimised or neutralised.

A related emerging form of retailing which is gaining prominence in all of Australia’s capital cities is the direct factory outlet (DFO). This use tends to be located in industrial areas and typically includes household goods and clothing and footwear. Some DFOs locate in large shopping centres or at markets but all rely on the benefits of co-location or agglomeration where shoppers can touch and feel comparable items. In most cases, this retail use requires extensive site areas and parking. In recent years, DFOs have begun to establish in designated precincts in or proximate to major airports.

Despite their requirements for space and high exposure, many of the outdoor large format retailing activities could well be located in or adjacent to activity centres where they could help underpin the vitality of the centre through economies of agglomeration and reduce the burden on infrastructure through greater consolidation of retail and commercial land use. This would be consistent with the principles of the SEQ Regional Plan which discourages out-of-centre development.

It is these and other trends and implications that Redland City Council should consider in its planning for the City’s centres growth and development.

4.2.8 Department Stores

The rise of “category killers” and outlet centres appears to be damaging the trading of traditional department stores. A practice once confined to discounting slow moving, shop-worn and slightly damaged merchandise from the department stores main stores has become a market in its own right. It is feared that the success of factory and warehouse outlets will continue to cause trading difficulties for department stores as shoppers become accustomed to the discounted prices. Certainly, retail spending trends suggest that these fears are well founded.

According to press commentary, traditional department stores are beset by a complex set of the problems, including:

- they’re overstocked;
- it is difficult for customers to get in and out quickly in a ‘cash rich, time poor’ society;

- they’re dull, featuring unadventurous stock and unimaginative merchandising;
- they’re lagging smaller store chains in computerisation for stock control and marketing research; and
- they have largely conceded to the competition, particularly big box discounting.

Nevertheless, this form of retailing is not dead yet. David Jones has demonstrated that the department store can be reinvented and refreshed, with sales success. Myer has been less successful but, in recent years, has shown a greater commitment to experiment and repackage its offer, including with the use of themed floors. This experience shows that middle income customers can be wooed back. The future prospects for department stores are also underpinned by the fact that shopping centres still need anchors.

4.3 Commercial Office Development

4.3.1 Centre-based Commercial Activity

Activity centres are a location for business, government and community services as well as retail activities. A major determinant of a firm’s office location is the location of the end market or customer. If the customer is located in a particular geographical area, and proximity is an important sales factor, the firm will be more likely to have a physical presence in that area. However, if a firm has a client base that is geographically dispersed, the locational preference may be more based on key inputs into the business process, which in many cases is a skilled workforce when dealing with business services. With this in mind, office types can be classified as follows.

- **Local offices** - this comprises local business services that primarily serve the local or regional population, for example, accountants, solicitors, real estate agents, government services and related business services that have a local orientation. These activities are predominantly located in major activity centres but can also be found in local or neighbourhood centres depending on the size and settlement pattern of the population they serve as well as local planning parameters.
- **Advanced business services** - this segment comprises ‘new economy’ businesses that offer highly specialised services potentially serving local, national and international clients. Key locational criteria for this segment are access to the highest quality skills and business networks (i.e. being 'close' to partner firms and clients). ‘Lifestyle’ is important to this group, because of the need to attract and retain skilled workers. Advanced business services tend to locate in the CBD of their capital city of in prominent major centres.
- **Corporate headquarters** - this encompasses 'large' firms and institutions like leading companies, stock exchanges, core government offices and major health and education facilities. A location that provides access to quality infrastructure, skills, related business services and a prestigious address is typically desired. Quality access to a wider population base via road and public transport links is also important. Firms in this category tend to demand a CBD address or a high profile suburban / regional centre site with good access to managerial and executive labour.

These business types are usually centre-based but can locate in a number of settings. This is where planning policy can have an important supply-side influence on economic development and employment creation. Centres that are geared towards particular business typologies will have a greater chance of attracting those businesses and the jobs that come with them. This means that it is important for Redland City Council to have an explicit positioning strategy for preferred types of commercial development. This should be consistent with the principles outlined in this Centres Strategy Review and as articulated in Council's Economic Development Strategy.

4.3.2 Other Office Types and Locations

These include:

- **Back offices of large firms** - call centres and data processing centres that serve a wide market favour locations that have a relatively skilled but stable workforce with few alternative employment opportunities. Low property costs are also desired by these operations because they generally occupy 'large' horizontal floorplates. This sector is relatively 'footloose' and will tend to locate where the key criteria of affordable land and access to a stable workforce can be met.
- **Offices attaching to industry and institutions** – a significant stock of office activity will attach to industry, research facilities and institutions such as manufacturing precincts or university and hospital precincts. These types of activities will usually locate in industrial zones (in the case of manufacturing-related office activity) or in designated specialist activity centres (in the case of hospitals, research precincts and education institutions). As the institutional activity at the specialist centres (such as Universities) grows, so too will the demand for office space.
- **Office tower** - Many firms will seek out a centre-style office setting for their business. Such locations offer benefits in terms of: co-location with other firms / organisations (providing agglomeration benefits) and activities that offer a wide range of services (including lifestyle services); the opportunity for face-to-face business contact; quality information and communications infrastructure; and good accessibility by multi-modal transport systems (including road and radial public transport services). Some firms will seek an activity centre environment for their office premises. Such locations offer many of the benefits of an activity centre location, but on a smaller scale.
- **Campus-style office** - Some firms favour campus style accommodation. This refers to buildings on 'large' sites, high quality 'detached' buildings with large floorplates and superior landscaping (perhaps in conjunction with recreation facilities and cafes). High profile street frontages are desired for the corporate address. Note that this segment of the commercial office market tends to differ from the activity centre office market because sites and facilities of this nature are generally difficult to find in traditional activity centres. Organisations that favour this type of accommodation will therefore tend to look for out-of-centre sites, much like the freestanding shopping centre. It is important to recognise that the SEQRP framework discourages out-of-centre development. Therefore, this style of facility is consistent with State Government policy if located in an activity centre, but not if located in an out-of-centre location. In Brisbane, these types of campus-style office precincts are starting to appear on the fringe of the CBD in places like Newstead or Tenerife, in designated centres.

4.3.3 The Growth of Home-based Business Activity

There has been a recent growth and continuing trend for home-based businesses in Australia. Corporate downsizing, the greater premium placed on skills and knowledge, the ability of businesses to readily source inputs from remote suppliers and enhanced communications and information technology have provided opportunities for new and more flexible modes of working, and have given rise to the 'home-based business'. Micro and small businesses, especially new start-ups, are establishing in home offices and in low rent offices and shopfronts in the suburbs and in regional centres. People that establish companies in fields like design, marketing, software development, health and consultancy advice drive this activity.

The home-based business trend is also driven by societal changes including greater female participation in the workforce, balancing family life with careers, a re-emergence of thought in society about the importance of work-life balance, flexible working practices and employers' willingness to allow staff to work from home. More opportunities exist for sole operators to work from home on a contract basis, or for workers still attached to firms to 'hot-desk' or 'telecommute' with part of the time spent at an office in the central workplace location and part of the time at home or in another remote location.

As home-based business activity continues to grow, there will be implications for commercial land requirements that will require creative responses from local Councils. For example, as home-based businesses grow, and as new staff is added, many firms will seek to move from the home office to a conventional office in their local area. Their move into the commercial office market may be a cautious step to relatively cheap accommodation until the business can sustain higher rents. Their target is therefore low-grade office space and residual shopfronts. In growth areas like Redland City, such space is not common so a strategy to encourage small office development could be pursued to accommodate this growing sector.

Implications for Centres Planning and Development in Redland City

The case put forward in the 2001 Redland Shire Centres Study that activity centres will only work effectively (socially, culturally, economically and environmentally) if they perform a multitude of functions, is supported by this review. However, it is also recognised (as was the case in the 2001 Study) that retailing remains a key component of any activity centre and is more often than not the primary reason for residents and visitors to patronise the centre. (The only exception would be specialist activity centres that may be anchored by a health, research or education institution for example).

Therefore, the basic 'building block' of an activity centre network and hierarchy is in most cases retail activity. Centres that generate a 'large' number of retail visits from a 'large' catchment are well placed to accommodate other regional scale activities such as community services and other commercial activities. This is because retailing generates a large number of trips for a variety of purposes. This enables other land uses to co-locate with retailing and thus generate co-location benefits. This includes the ability to undertake multi-purpose trips (e.g. shopping plus entertainment plus business in the one location) and share common infrastructure (e.g. public transport, open space and parking).

Planning for centres growth and development in Redland City should reinforce the multi-purpose function of activity centres and the employment opportunities this brings. A centres land use planning framework, which provides for a greater number and diversity of business and employment opportunities in appropriate settings, will provide a framework which allows more people to work close to home. As well as reducing the burden on transportation infrastructure (by reducing travel within and to and from the City), this will facilitate an increase in employment self-sufficiency and self-containment of employment and a more robust economic base for Redland City.

Furthermore, by encouraging to locate in its centres the types of industries and economic activities espoused by the South East Queensland Regional Plan (refer to Section 3 of this review), Redland City will be strategically promoting local economic development which capitalises upon Redland's 'place' in the regional economy and which contributes to the greater regional good.

But as well as being cognisant of local and regional planning policies, and broader retail and commercial development trends, centres planning and development must also respond to local socio-economic trends and prospects. This is the subject of the following section of this report.

5 Redland City's Changing Population and Evolving Economy

5.1 Population Characteristics and Trends

Redland City, located on Moreton Bay and approximately 45-55 minutes by road (outside peak) or rail from the Brisbane CBD, is a diverse and growing City in one of the fastest growing regions in Australia. According to the ABS Regional Population Growth, in 2006 Redland City had a resident population of 131,210. Between 1996 and 2001 the City's population increased at an average annual rate of 2.6% compared to 2.1% for South East Queensland and 1.7% for the State as a whole. From 2001 to 2006 relative population growth in Redland slowed from the 2.6% mentioned above to 2.3%. This is less than the rate of growth for South East Queensland (2.6%) and Queensland (2.4%) for the same period.

Table 1. Population Change, Redland City, SouthROC, SEQ and Queensland, 1996 – 2001 and 2001 - 2006

	Redland	SEQ	QLD
1996	103,082	2,224,784	3,338,690
2001	117,252	2,464,633	3,628,946
2006	131,210	2,801,864	4,090,908
% Change p.a. 1996-2001	2.61%	2.07%	1.68%
% Change p.a. 2001-2006	2.27%	2.60%	2.43%

Source: ABS Regional Population Growth, Australia, 1996 to 2006

5.2 Redland's Labour Force Profile

5.2.1 Labour Force Participation

In 2006, approximately two-thirds (67%) of Redland City's population was of working age (15-65), compared to 74% for the SouthROC region and 68% for SEQ. Table 2 shows key labour market indicators for Redland City and the wider region. The labour force participation rate for Redland is greater than that of the SouthROC region, SEQ and Queensland. The proportions of full-time and part-time employment of Redland City's employed residents closely resemble the proportions for the SouthROC region, SEQ and Queensland. The proportion of employed males to females at 53% males and 47% females in Redland is similar across the board in SouthROC, SEQ and Queensland.

Table 2. Key Labour Market Indicators

Indicator	Redland City	SouthROC	South East Queensland	Queensland
Total Population	131,210	835,666	2,801,864	4,090,908
Population % Change 2001 – 2006	11.90%	0.63%	13.68%	12.73%
Total Labour Force, 2006	64,377	442,321	1,336,279	1,915,947
Labour Force Participation rate, 2006	64%	61%	62%	62%
Labour Force Participation rate, 2001	65%	62%	63%	63%
No. of residents employed in Industry, 2006	61,733	419,078	1,273,653	1,824,996
• % Full-time employment, 2006	64%	63%	64%	65%
• % Part-time employment, 2006	30%	31%	30%	29%
• % Male Employment, 2006	53%	54%	53%	54%
• % Female Employment, 2006	47%	46%	47%	46%
Unemployment Rate, 2006	4.11%	5.25%	4.69%	4.75%
Unemployment Rate, 2001	7.01%	9.43%	8.37%	8.23%
Youth Unemployment Rate (15-24 years), 2006	8.16%	9.58%	9.02%	8.91%
Youth Unemployment Rate (15-24 years), 2001	14.29%	16.57%	15.62%	15.34%

Notes:

" Labour force refers to those people who are employed plus those people who are unemployed and actively seeking work

^ For any given area, the Labour Force Participation Rate is the labour force (number of people employed and those unemployed who are actively seeking work) expressed as a percentage of the resident population aged 15 years and over

Figures refer to total jobs in industry. Does not include the small number of jobs reported as 'not classified' or 'not stated' in the ABS Census.

* % Full-time and Part-time employment and % Male and Female employment are expressed as proportions of total employment, not the total labour force

Source: ABS Census, 2006 and 2001

5.2.2 Unemployment

Redland City had a relatively lower unemployment rate of 4.11% in 2006 than that of the SouthROC region (5.25%), South East Queensland (4.69%) and Queensland (4.75%). This unemployment rate in 2006 was lower than that in 2001, decreasing by 3.1% from 7.0% in 2001. Redland City's youth unemployment was significantly less in 2006 (8.16%) than in 2001 (14.3%).

5.2.3 Employment Self-Containment

The 2006 ABS Journey to Work data reveals that 60% of Redland's resident workforce (approximately 37,000 workers) travel to locations outside the City to work each day. That is, 60% of working people who live in Redland City rely on jobs outside of the local area, predominantly in Brisbane City.

This means that 40% (approximately 24,700) of Redland City's total working residents find employment in the local area. This is the rate of employment self-containment, which refers to the proportion of locally employed residents actually working in a local job. This is an increase from 38% self-containment of employment which was recorded in the 2001 Census. The level of employment self-containment, by definition, is always lower than the rate of employment self-sufficiency (see below).

Of the jobs that are actually located in Redland City in 2006 (32,100), nearly 77% (that is, the 24,700 jobs referred to above) are held by Redland City residents. Therefore, over 20% of local jobs (7,400) are held by persons that reside outside of Redland City.

5.2.4 Employment Self-Sufficiency

Employment self-sufficiency refers to the ratio of locally provided jobs (i.e. jobs in the local area) to the number of employed residents living in the area. It allows for journey to work movements between the local area and other locations. This is also sometimes referred to as the rate of 'net employment self-containment'. Redland City has a relatively low level of employment self-sufficiency, that is, the ability of the local government area to provide local employment for employed residents. In other words, there are fewer jobs located in Redland City than there are working residents. According to the 2006 Census, Redland City has approximately 61,700 working residents. With a local job stock of approximately 32,100 jobs, the employment self-sufficiency rate for Redlands is 52%.

Table 3. Employment Self-Sufficiency, Redland City, 1996-2006

	1996	2001	2006
Self-sufficiency	46.5%	50.0%	52.0%

Source: ABS Census of Population and Housing, ABS Journey to Work Data, 1996, 2001 & 2006

Self-sufficiency has been tracking well for the Redland Local Government Area, having increased from 46.5% in 1996 to 52% in 2006, as shown in Table 3. This suggests that that Redlands is either attracting more employees from outside of the City to work or is retaining more of Redlands resident employment, or possibly both. This is a positive sign for a growing economy.

Table 4 shows Redland City's level of employment self-sufficiency by providing a comparison of employment (by industry) of Redland City's resident population with the number of jobs actually located in the City. Redland's level of employment self-sufficiency is much less than that of the SouthROC region, which has a level of employment self-sufficiency of 72%. In the Gold Coast, employment self-sufficiency is much higher at 83%. Employment self-sufficiency in Brisbane is 118% however this is not unexpected given Brisbane City's role as the hub of economic activity in South East Queensland and gateway to national and international markets.

Table 4. Employment Self-Sufficiency, Redland City, SouthROC LGAs and Brisbane City, 2006

	Beaudesert	Gold Coast	Logan	Redland	Tweed	Brisbane	SouthROC
Total Persons Employed	29,490	218,369	80,230	61,733	29,259	488,611	419,081
JTW	12,781	181,800	51,864	32,106	22,283	576,514	300,834
Self-sufficiency	**43.3%**	**83.3%**	**64.6%**	**52.0%**	**76.2%**	**118.0%**	**71.8%**

Source: ABS Census of Population and Housing, ABS Journey to Work Data, 2006

When looking at the rate of employment self-sufficiency by industry sector, the net shortfall (or surplus) of local jobs in each industry sector can be identified. According to Table 5, proportionally speaking, the industries with a relatively high net shortfall of local jobs include:

- Manufacturing;
- Construction;
- Transport, Postal and Warehousing;
- Health Care & Social Assistance; and
- Retail Trade.

5.2.5 Employment Change, 2001 to 2006

A comparison of the City's workforce between 2001 and 2006 shows that it has grown from an approximate 52,400 employed residents in 2001 to 61,700 in 2006. This represents an increase in the City's workforce of 9,300 employed residents for the five years between 2001 and 2006. Over the same period, the number of jobs within the City has increased from an approximately 26,200 in 2001 to 32,100 in 2006 or by 5,900 jobs. Of the additional 5,900 new jobs created within the City between 2001 and 2006, approximately 80% of these, or 4,600 employ City residents. The Census data shows that the City's rate of employment self-containment (proportion of total residents with a job who are working locally in Redland City) increased from 38% in 2001 to 40% in 2006.

The rates of employment self-sufficiency, self-containment and workforce containment for the five years between 2001 and 2006 show that the City's economy has provided increased local employment opportunity with an increased level of employment self-containment. These are encouraging signs that the Redlands economy is moving towards the long-term employment goals of the City of 60% employment self-containment.

Table 5. Employment Change, Redland City 2001-2006

	2001	2006	Change 2001-2006	% Change 2001-2006
City workforce	52,400	61,700	9,300	18%
City job stock (local jobs)	26,200	32,100	5,900	23%
City workforce employed in City	20,100	24,700	4,600	23%
City workforce employed outside City	32,300	37,000	4,700	15%

Source: ABS Census of Population and Housing, ABS Journey to Work Data, 2001 and 2006

5.2.6 Economic Diversity

A measure of a region's robustness is its Herfindahl (diversity) Index. A high index suggests a high level of diversity in the economy. When Redland City is compared to other Local Government Areas using this index we see that it has a relatively high level of industrial diversity.

A high level of self-containment (except where the region contains a major, dominant industry or sector) indicates that there is a wide range of economic activities present and therefore, a diverse industrial base. Redland City has a Herfindahl Index value of 4.8. Other municipalities are shown in Table 7.

At this stage of its economic development, Redland City has a perhaps surprisingly high level of diversity. As the economy grows and develops, the level of diversity should increase and more self-containment in employment is possible.

Table 6. Self-Sufficiency of Employment by Industry in Redland City, 2006

Industry of Employment	Resident Workforce”	Local Job Stock+	Net Shortfall of Local Jobs*
Manufacturing	7,606	3,005	4,601
Construction	6,528	2,626	3,902
Transport, Postal and Warehousing	3,569	981	2,588
Health Care & Social Assistance	6,142	3,839	2,303
Retail Trade	7,729	5,511	2,218
Public Administration & Safety	3,567	1,501	2,066
Wholesale Trade	3,451	1,477	1,974
Professional, Scientific & Technical Services	3,321	1,553	1,768
Financial & Insurance Services	1,876	626	1,250
Other Services	2,617	1,453	1,164
Administrative & Support Services	2,091	980	1,111
Education & Training	4,024	3,156	868
Accommodation & Food Services	3,264	2,483	781
Information Media & Telecommunications	926	415	511
Rental, Hiring & Real Estate Services	1,269	860	409
Electricity, Gas, Water & Waste Services	561	222	339
Arts & Recreational Services	668	398	270
Mining	464	228	236
Agriculture, Forestry & Fishing	464	405	59
Inadequately Described	1,594	402	1,192
Total^	**61,731**	**32,121**	**29,610**
Jobs to Workforce	**52.0%**		
Net Shortfall to Workforce	**48.0%**		

Source: ABS Census of Population and Housing, ABS Journey to Work Data 2006

Note:

“ The resident workforce consists of those people who live in Redland City and are employed in a job somewhere. They could be employed in a job that is located in Redland City or it could be located somewhere else outside the City.

+ The local job stock refers to the number of jobs actually located in Redland City. The people who hold those positions could be Redland City residents or people who commute to Redland to work.

* The net shortfall of local jobs refers to the number of Redland residents who travel to areas outside the City to work. If more of these workers can be employed in Redland City, a higher level of employment self-containment could be achieved. That is, more people who live in the City working in the City.

^ The table only reports total jobs in industry. It does not include the small number of jobs reported as ‘not classified’ or ‘not stated’ in the ABS Census. This does not affect the reported rate of employment self-sufficiency and the conclusions drawn.

Source: ABS Census of Population & Housing, 2006 and ABS Journey to Work Data, 2006

Table 7. Diversity Indices (Herfindahl) for Redland City and other SEQ LGAs

Local Government Area	Herfindahl/ Diversity Index	LGA Rank (in SEQ)
Brisbane	6.6	1
Gold Coast	4.9	2
Redland	***4.8***	***3***
Maroochy	4.6	4
Caboolture	3.7	5
Caloundra	3.6	6
Noosa	3.3	7
Pine Rivers	3.2	8
Logan	3.1	9
Ipswich	3.1	10
Beaudesert	2.8	11
Redcliffe	2.7	12
Esk	2.1	13
Boonah	2.0	14
Laidley	1.9	15
Gatton	1.8	16
Kilcoy	1.7	17

Source: ABS Journey to Work data with interpretations by SGS Economics and Planning

Note: The 2006 Census was undertaken prior to the Queensland Local Government amalgamations.

5.3 Redland's Future Population

5.3.1 Population Forecasts

According to Redland City Council's planning estimates, the population of Redland City is expected to reach approximately 143,800 persons by 2011 and around 182,700 by 2031 as outlined in Table 8.

Table 8. Population Growth Forecasts, Redland City, SouthROC Region, SEQ and Queensland, 2006-2031

Area	2006	2011	2016	2021	2026	2031
Redland	132,971	143,822	154,673	165,524	176,375	182,719
SEQ	2,802,523	3,072,262	3,376,829	3,677,027	3,959,481	4,241,935
Queensland	4,091,546	4,428,138	4,823,408	5,211,995	5,583,956	5,955,917

Source: Redland City Council (planning estimate)

It is evident that the population growth rate for Redland City is similar, if only a small amount lower, than that of Queensland. SEQ has a higher forecasted growth rate than both Redlands and Queensland due to the high levels of population growth currently being experienced within the SEQ region indicated in Table 9.

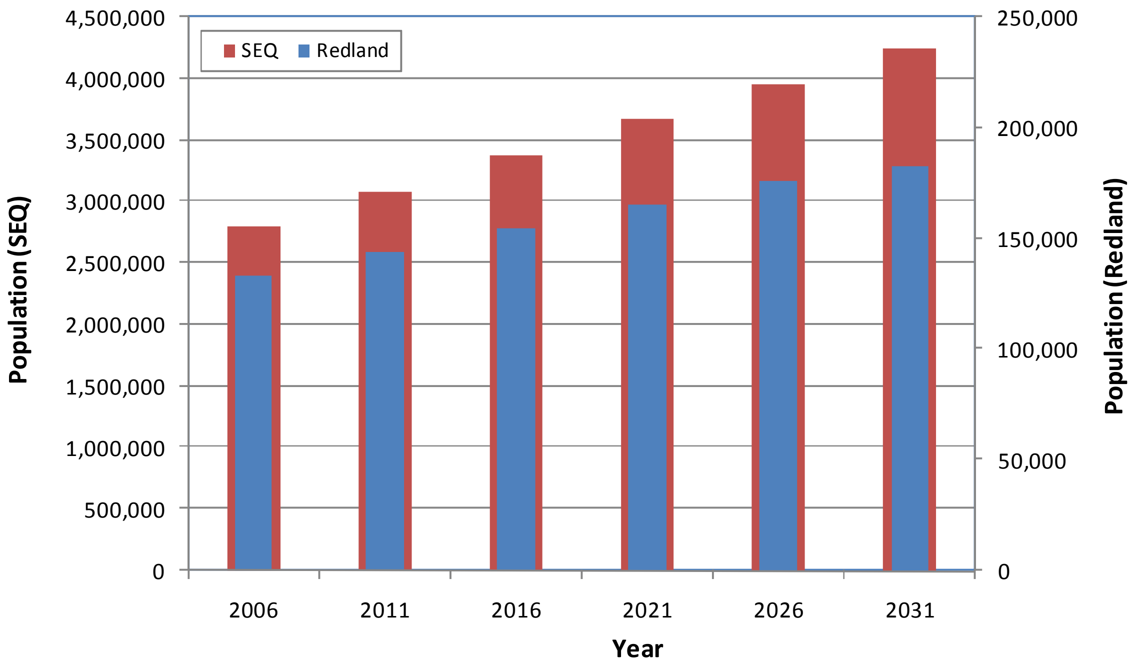
Table 9. Population Growth Forecasts, % Change, Redland City, SouthROC Region, SEQ and Queensland, 2006-2031

Area	2006-11	2011-16	2016-21	2021-26	2026-31
Redlands	8%	8%	7%	7%	4%
SEQ	10%	10%	9%	8%	7%
Queensland	8%	9%	8%	7%	7%

Source: Redland City Council (planning estimate) with interpretations by SGS Economics and Planning

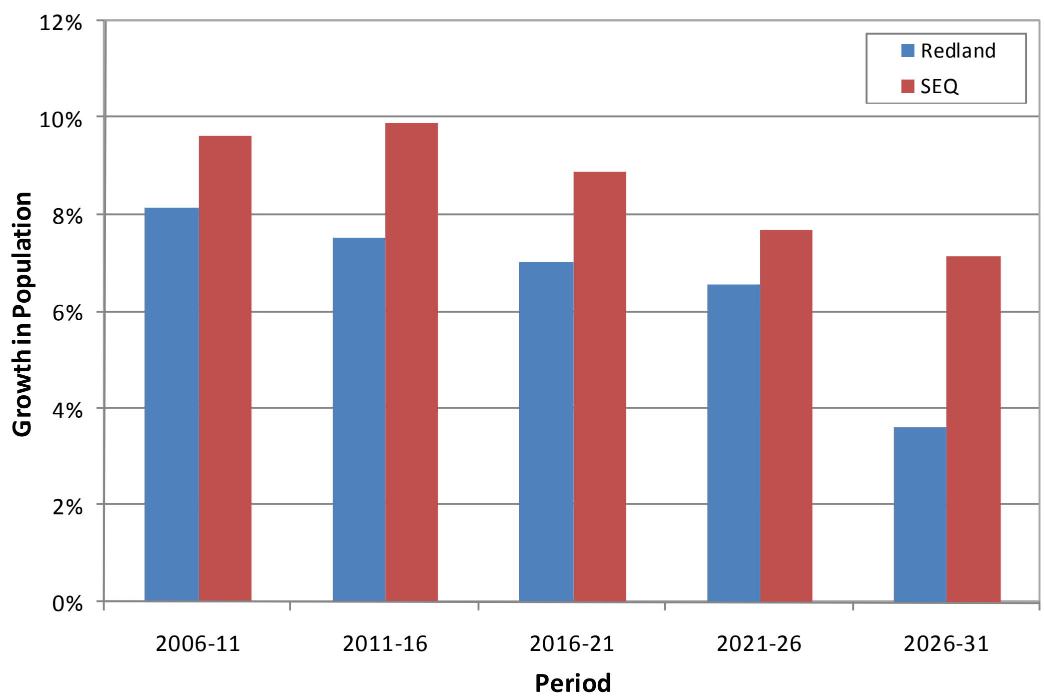
Figures 4 and 5 below illustrate the forecast population growth and growth rates in Redland City compared to SEQ between 2006 and 2031. Positive population growth is expected between 2006 and 2031 for both Redland City and SEQ. SEQ has a higher overall growth rate when compared to the percentage changes forecast for Redlands. The average annual percentage change in population for both SEQ and Queensland is higher (1.7% and 1.5% respectively) than that of Redlands (1.3%). For Redland City an average annual population growth rate on 1.3% represents a reduced population growth rate to that experienced over the last 20-30 years where population growth has been sustained at more than 2% annually. This slowing in population growth in the City is particularly pronounced in the 2026-2031 period with an annual population growth rate of 0.7% expected.

Figure 4. Forecast Population Growth, Redland City and SEQ, 2006-2031



Source: Redland City Council (planning estimate) with interpretations by SGS Economics and Planning

Figure 5. Forecast Population Growth Rates, Redland City and SEQ, 2006-2031



Source: Redland City Council (planning estimate) with interpretations by SGS Economics and Planning

5.3.2 Future Population by Locality

In order to plan appropriately for Redland City's activity centres, consideration needs to be made for future settlement patterns, that is, the distribution of future population across the City's localities. Table 10 shows the anticipated distribution of population across Redland City's localities as defined by Statistical Local Area (SLA). Figure 6 shows the anticipated change in population by locality between 2006 and 2031. Figure 7 illustrates on a map Redland City's projected 2031 total population by locality and in relation to existing and proposed centres of activity.

Table 10. Forecast Population Change by Locality, Redland City, 2006-2031

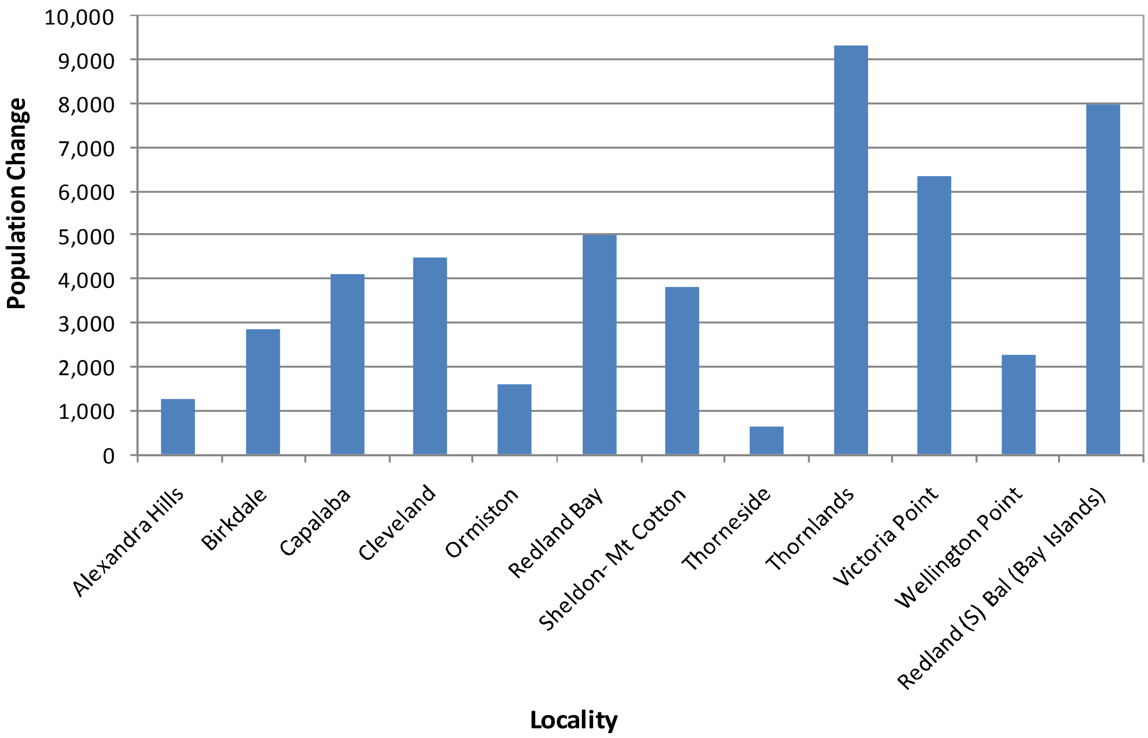
	2006	2031	Change 2006-2031	% of Change (Local)	% of Total Change (Region)
Alexandra Hills	17,661	18,930	1,269	7%	3%
Birkdale	14,661	17,514	2,853	19%	6%
Capalaba	17,905	22,035	4,130	23%	8%
Cleveland	14,164	18,649	4,485	32%	9%
Ormiston	5,793	7,403	1,610	28%	3%
Redland Bay	11,042	16,044	5,002	45%	10%
Sheldon- Mt Cotton	5,168	8,985	3,817	74%	8%
Thorneside	3,514	4,158	644	18%	1%
Thornlands	11,073	20,419	9,346	84%	19%
Victoria Point	14,566	20,924	6,358	44%	13%
Wellington Point	10,499	12,756	2,257	21%	5%
Redland (S) Bal (Bay Islands)	6,925	14,902	7,977	115%	16%
Redland City	132,971	182,719	49,748	37%	100%

Source: Redland City Council (planning estimate) with interpretations by SGS Economics and Planning

Redland City's population is expected to increase by 49,748 people between 2006 and 2031. As shown in Table 10 and Figure 6, the suburbs of Thornlands and Victoria Point and to a lesser extent Redland Bay, Cleveland and Capalaba are expected to receive the greatest share of this population growth. Population growth on the Southern Moreton Bay Islands is also expected to continue at rates determined by prevailing market conditions.

Of the estimated increase of 49,748 people over the next twenty-five years a substantial share is expected in the City's southern suburbs. Thornlands is expected to account for 19% of the City's population growth, or about 9,346 people. Victoria Point is expected to accommodate an additional 6,358 people or 13% of the City's total population growth with Redland Bay accommodating 5,002 people or about 10% of the City's forecast population growth. The Southern Bay Islands are expected to accommodate about 16% of the growth or 7,977 people based on current market conditions.

Figure 6. Forecast Population Growth by Locality, Redland City, 2006-2031



Source: Redland City Council (planning estimate) with interpretations by SGS Economics and Planning

Figure 7 below illustrates forecast population densities of each Statistical Local Area (SLA) within Redland City in the year 2031. Thorneside, Wellington Point, Ormiston and Victoria Point are expected to be the most densely populated with a density between 1,500 and 1,650 people per square kilometre. Redland Bay, Sheldon-Mt Cotton and Redlands Balance are expected to have the lowest population densities of between 40 and 600 people per square kilometre.

Figure 7. Forecast Population Densities by Locality, Redland City, 2031

Source: Redland City Council (planning estimates) with interpretations by SGS Economics and Planning

As shown in the figures and tables, much of Redland City's forecast population growth is expected to occur in the southern parts of the City led by Thornlands, Victoria Point, the Southern Moreton Bay Islands and Redland Bay. To serve this population growth, the role and function of the City's centres in the southern suburbs along with the accessibility of these centres for future residents needs to be considered in detail.

Victoria Point, serving a catchment of less than 45,000 people, should continue to accommodate the weekly shopping needs of its catchment population. This would include residents in neighbouring Redland Bay as well as Victoria Point. It is considered that the Redland Bay Neighbourhood Centre be 'promoted' in the hierarchy to a District Centre but only around the time that the required population catchment threshold of 15,000 persons for Redland Bay is met (around the year 2026).

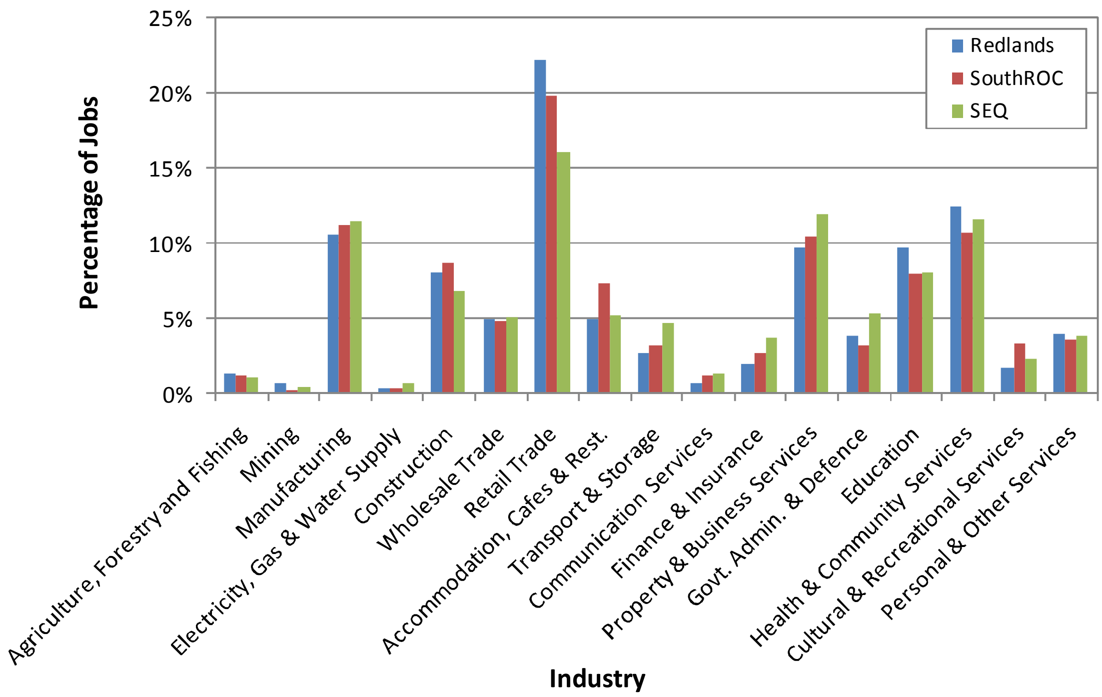
Thornlands is expected to grow by around 9,350 people between 2006 and 2031 to approximately 20,400 people, representing 19% of Redland City's total population increase over the period. By 2031, with a population of over 20,000, Thornlands will be the City's third most populous locality behind Capalaba and Victoria Point. It should be noted that most of the expected population growth in the suburb of Thornlands is expected to occur in eastern areas of the suburb that fall within the catchment areas of Cleveland and Victoria Point centres.

5.4 Redland City and the Regional Economy

5.4.1 Employment by Industry

According to the 2006 ABS Census, in proportional terms, employment in Redland City (that is, jobs actually located in the City) is dominated by retailing and the services sectors, notably Retail, Health & Community Services, Property & Business Services and Manufacturing. Education industry jobs are also significant in Redland City.[4]

Figure 8. Employment by Industry, Redland City, SouthROC and SEQ, 2006



Source: ABS Journey to Work data, 2006

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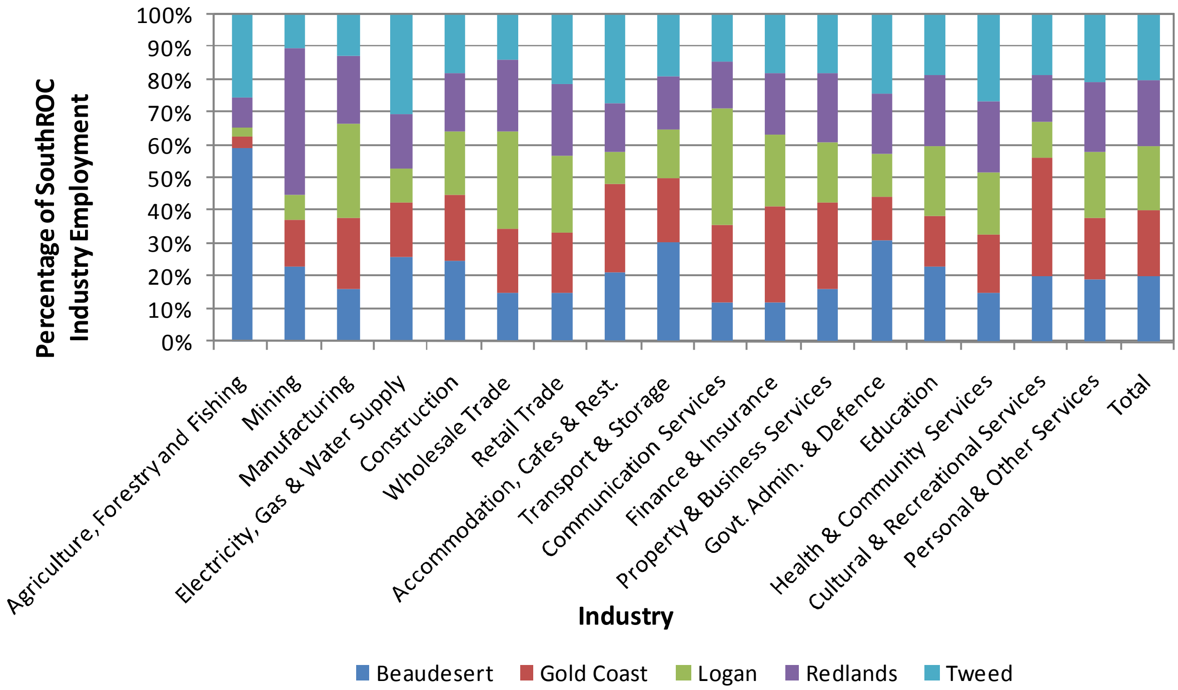
4 Redland's employment profile is informed by an analysis of ABS Journey to Work data. The Journey to Work data differs to the Basic Census data, which records employment by place of residence. Although Basic Census data provides a good measure of industry employment, the Journey to Work data, which records employment by work location, offers a more accurate representation of the industrial structure of Redland City and comparative areas.

Figure 9 shows the relative size of industries in Redland City in absolute employment terms compared to its neighbouring SouthROC LGAs.

Figure 9. Contribution to the SouthROC Region's Industry Employment, SouthROC LGAs, 2006

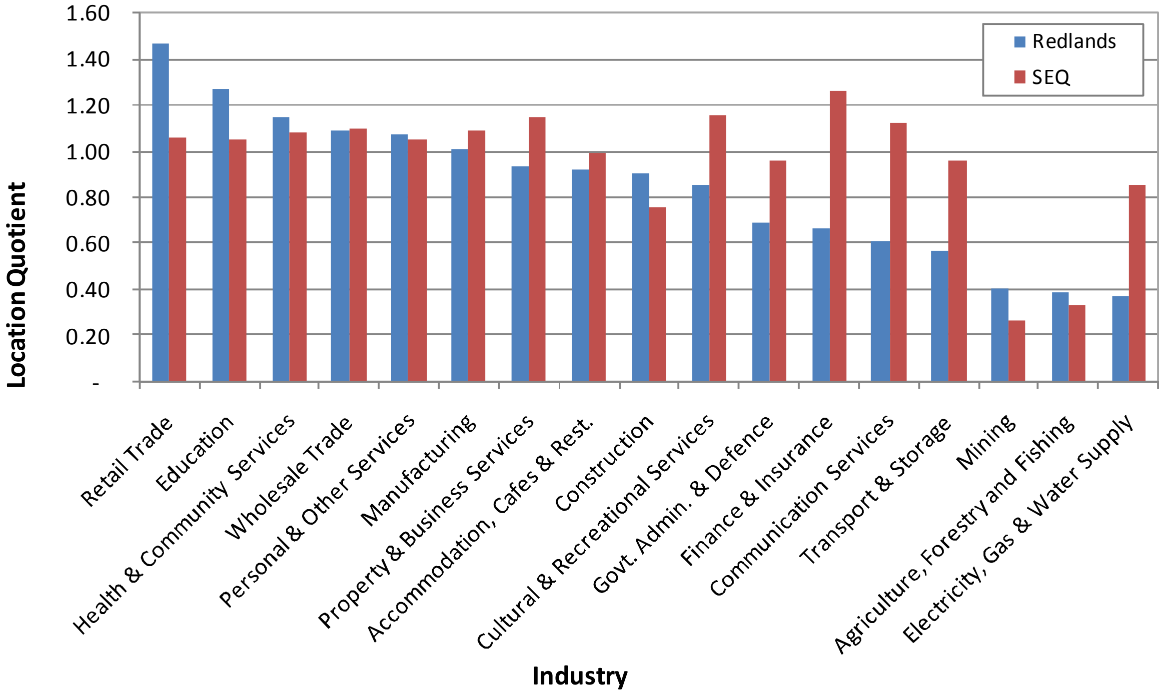


Source: ABS Journey to Work data, 2006

Figure 10 provides a more detailed breakdown of selected industries in Redland City that have an export orientation, according to employment location quotient (LQ) analysis. By comparing the proportion of jobs in each industry in Redland City with the proportion of jobs in the same industry in Queensland, a location quotient figure (or LQ) is derived. A ratio above 1.0 indicates an over-representation of jobs in that sector, suggesting that a quantum of those jobs is generated because of activities outside the local area or region (i.e. inter-regional exports). Anything less than 1.0 suggests that the industry concerned is a net importer.

In simple terms a higher location quotient suggests a stronger inter-regional export orientation for the industry in question.

Figure 10. Location Quotients, Selected Industry Sectors, Redland City and South East Queensland, 2006



Source: ABS Journey to Work data, 2006

Considering the information presented in the chart above and the proportions of employment in each industry, those industries in Redland City with a strong inter-regional export-orientation (that is, a location quotient of more than 1.00) include:

- Retail Trade;
- Education; and
- Health & Community Services;
- Wholesale Trade; and
- Personal and Other Services.

When compared with the location quotients for the SEQ region, Redland is over-represented in the industries of:

- Agriculture, Forestry and Fishing;
- Mining;
- Construction;
- Personal and Other Services;
- Health and Community Services;
- Education; and
- Retail Trade.

5.4.2 Redland's Evolving Economy, 2001 to 2006

The Redland City economy has clearly evolved between 2001 and 2006. Redland City has traditionally relied on population growth-driven sectors in retailing, personal and community services, and the traditional agricultural mainstays of poultry farming and horticultural production for its economic development.

Population will continue to drive the provision of many jobs in Redlands, but as broader economic trends and influences take hold, and as Council and other agents of change embark on planning and development strategies to encourage new industries, Redland City can successfully grow a diverse and robust economy offering meaningful employment for its residents.

Table 11. Employment by Industry, Redland City, 2001 and 2006

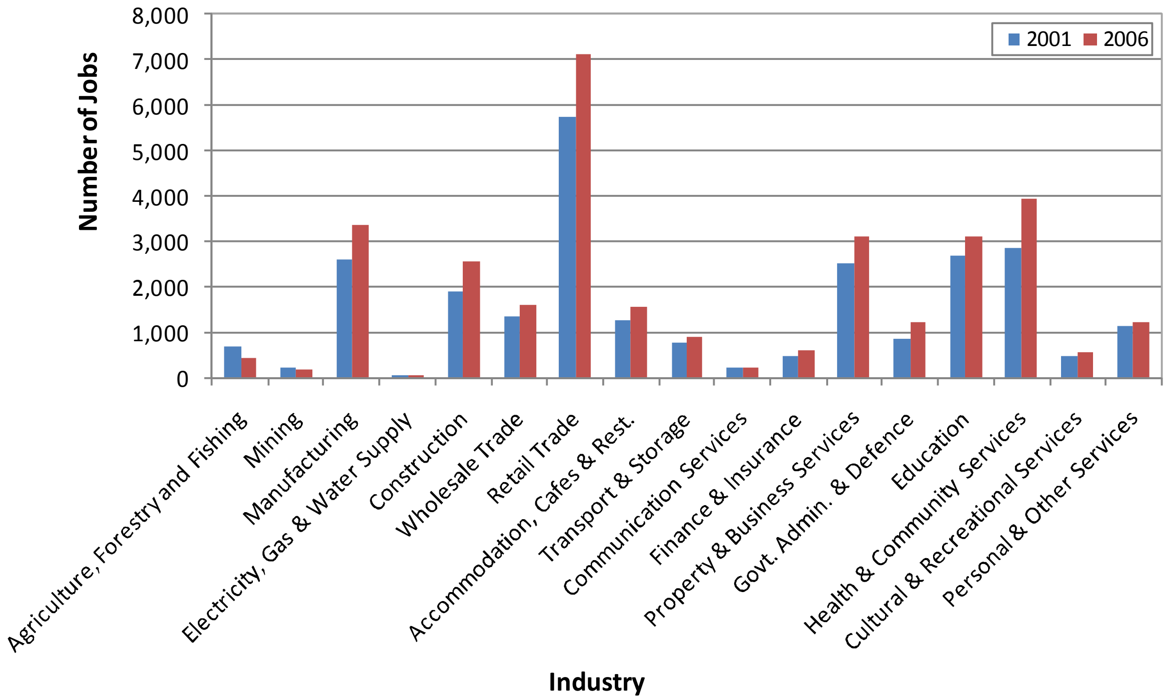
	2001		2006	
	Employment	% of Total	Employment	% of Total
Agriculture, Forestry and Fishing	719	3%	444	1%
Mining	230	1%	222	1%
Manufacturing	2,610	10%	3,375	11%
Electricity, Gas & Water Supply	86	0%	102	0%
Construction	1,932	7%	2,590	8%
Wholesale Trade	1,391	5%	1,613	5%
Retail Trade	5,748	22%	7,104	22%
Accommodation, Cafes & Rest.	1,304	5%	1,581	5%
Transport & Storage	800	3%	898	3%
Communication Services	233	1%	243	1%
Finance & Insurance	511	2%	634	2%
Property & Business Services	2,536	10%	3,116	10%
Govt. Admin. & Defence	874	3%	1,243	4%
Education	2,693	10%	3,133	10%
Health & Community Services	2,868	11%	3,975	12%
Cultural & Recreational Services	479	2%	565	2%
Personal & Other Services	1,153	4%	1,268	4%
Total	26,168	100%	32,106	100%

Source: ABS Journey to Work data, 2006 and 2001

Figure 11 shows the change in the number of jobs of each industry sector within the Redland City economy between 2001 and 2006. Importantly, industry sectors which have a predominantly centre-based location, and which are encouraged by local planning policies, most notably the March 2006 Redlands Planning Scheme, have shown significant growth during the five year period. These sectors include, but are not limited to:

- Retail Trade;
- Property and Business Services;
- Education;
- Health and Community Services;
- Construction; and
- Manufacturing.

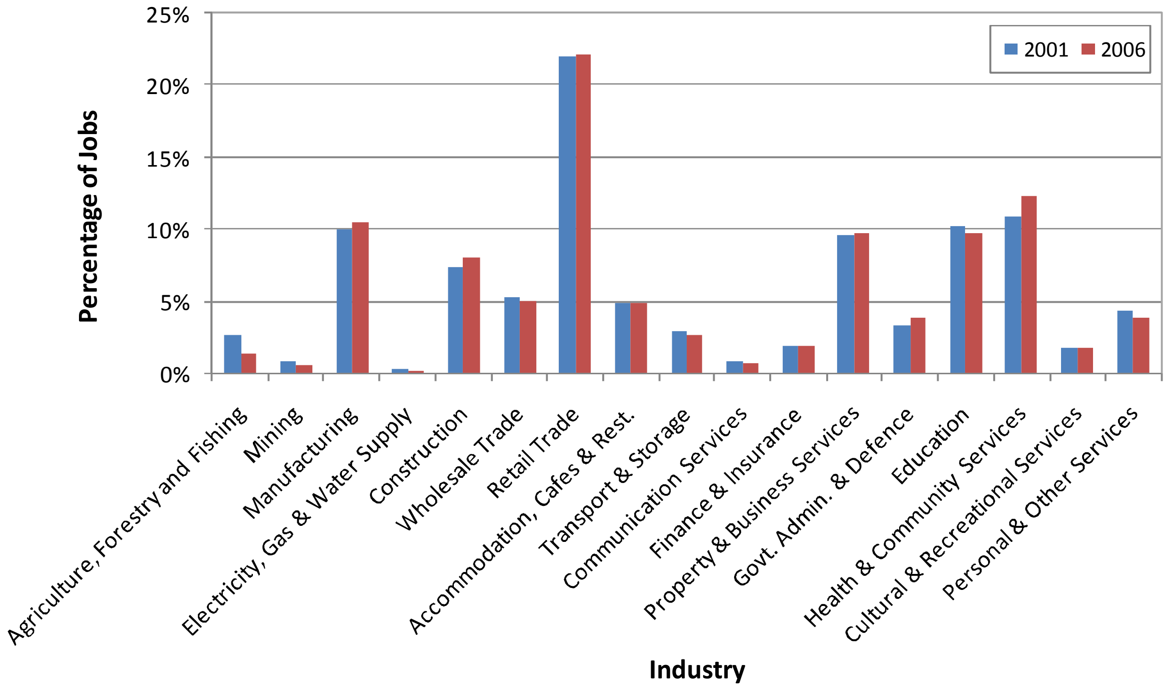
Figure 11. Employment by Industry, Redland City, 2001 and 2006



Source: ABS Journey to Work data, 2006 and 2001

Figure 12 overleaf shows the change in percentage job share of each industry in Redland City between 2001 and 2006.

Figure 12. Employment by Industry (%), Redland City, 2001 and 2006



Source: ABS Journey to Work data, 2006 and 2001

6 Centres Land Demand Analysis

6.1 Employment Forecasts

6.1.1 Forecast Employment Growth by Industry

The forecast employment demand, and therefore, the demand for employment land (and more specifically, in-centre employment land) in Redland City assumes that, consistent with policy settings and broader economic trends, influences and prospects, Redland City will continue to develop as a lifestyle and knowledge-based economy. This includes the development of new growth sectors like 'Lifestyle' Horticulture, Education, Professional Business Services (like finance, legal and property services), Cultural & Creative Industries, Marine & Bay Businesses and Home Based Businesses. It also includes the development of traditional industries into new, higher value forms, including agriculture and manufacturing and population driven sectors like retailing, health & community services and construction. It also maintains that Redland's tourism industry will continue to grow and evolve. This policy-driven scenario is informed in large part by the principles and directions of the South East Queensland Regional Plan.

Under this policy-driven economic development scenario it is forecast that Redland City will experience a net (cumulative) increase of approximately **24,435 jobs** between 2006 and 2031. (Note: this is the number jobs demanded by forecast economic growth over and above existing jobs located in Redland City of 32,121 in 2006). Therefore, total employment (that is, jobs actually located in Redland City) would be around 56,530 in 2031. Table 12 shows the expected employment change from 2006b to 2031 in five year intervals. This employment growth scenario reflects the preferred economic development policy direction for Redland City (as articulated in the City's Economic Development Strategy, the Corporate Plan and the Redlands Planning Scheme). In other words, this scenario purports that Redland City will experience economic development through the growth of its key or priority industry sectors as identified in the Economic Development Strategy and other supporting policy and strategy documents including the SEQ Regional Plan.

Table 12. Forecast Employment Change, Redland City, 2006-2031

2006	2011	2016	2021	2026	2031
32,095	36,982	41,869	46,756	51,643	56,530

Source: ABS Journey to Work (2006) with interpretations by SGS Economics and Planning

6.1.2 Increased Self-Sufficiency of Employment

The growth in employment in Redland City will result from a growth in exports and population growth, and it will be partly attributed to Redland's ability to 'capture' a greater share of existing and potential future jobs from other parts of the wider region. This means that Redland City will effectively increase its rate of employment self-sufficiency, and it is also assumed that labour force participation will increase. As a result, it is predicted that the total number of jobs in Redlands relative to the number of residents who are employed in the workforce[5] will increase from 52% in 2006 (and 2006) to 60% in 2031. Furthermore, the Labour Force participation rate is assumed to increase from 64% to 68%. Unemployment is assumed to remain at the 2006 level (4.11%) as a lower bound for unemployment to 2031.

Consistent with policy objectives, the projections of employment growth in Redland City to the year 2031 assume that employment self-sufficiency (that is, jobs located in Redland City as a proportion of local residents who are employed) will improve from the current rate (in 2006) of 52% to meet Redland City Council's stated target of 60%. That is, the forecast total number of jobs in Redland City in 2031 will reflect a higher rate of employment self-sufficiency than is presently the case. In order for this target to be met, with an increase in self-sufficiency of total employment of 8% (from 52% in 2006 to 60% in 2026 sustained to 2031), the rate of employment growth (that is, jobs located in Redland City) will need to be much higher than (almost double) the rate of population growth over the same period.[6] Much of the forecast employment growth will occur in Redland City's multi-purpose activity centres. Table 13 shows the breakdown of Redland City's employment forecasts by industry sector.

Table 13. Forecast Employment by Industry, Redland City, 2006-2031

Industry Sector	2006	2031	Change 2006-31	% of Total Change
Agriculture, Forestry and Fishing	435	729	294	1%
Mining	219	582	363	1%
Manufacturing	3,355	5,993	2,638	11%
Electricity, Gas & Water Supply	99	179	80	0%
Construction	2,649	4,173	1,524	6%
Wholesale Trade	1,605	2,871	1,266	5%
Retail Trade	7,065	14,726	7,662	31%
Accommodation, Cafes & Rest.	1,572	3,153	1,581	6%
Transport & Storage	900	1,590	690	3%
Communication Services	241	438	197	1%
Finance & Insurance	627	1,262	635	3%
Property & Business Services	3,158	5,977	2,819	12%
Govt. Admin. & Defence	1,244	1,588	343	1%
Education	3,136	4,660	1,524	6%
Health & Community Services	3,942	5,585	1,643	7%
Cultural & Recreational Services	559	1,008	449	2%
Personal & Other Services	1,289	2,015	726	3%
Total	**32,095**	**56,530**	**24,435**	**100%**

Source: ABS Journey to Work (2006) with interpretations by SGS Economics and Planning

5 The workforce is different to the labour force in that the latter includes those who are employed as well as those who are unemployed and actively seeking work.

6 Even if the future (2031) jobs target was based on a 2006 rate of employment self-containment of 52% (as currently applies in 2006), the rate of employment growth required between 2006 and 2031 to maintain that level of employment self-sufficiency at the City's projected rate of population growth would still be almost twice the rate of population growth over the period.

6.1.3 Forecast Employment Growth by Locality

Section 5.3.2 above reported on forecast population growth in Redland City by locality / suburb between 2006 and 2031. The tables and figures in that section revealed that those suburbs expected to accommodate the greatest increase in population over the twenty years are Thornlands, Victoria Point, Southern Moreton Bay Islands and Redland Bay. This is consistent with the Redlands Planning Scheme which identifies urban growth areas in the southern parts of the City.

Consistent with the provisions of the Redlands Planning Scheme, which promotes consolidation of economic activity in and around a network of multi-purpose activity centres, it is considered that the bulk of forecast employment growth in these areas can be accommodated in the City's Major Activity Centre zones of Capalaba and Cleveland. Other localities expected to accommodate a significant share of the City's employment growth over the next twenty-five years include Thornlands and Redland Bay. Some of this growth will occur in existing centres. However, it is expected that a substantial share will be accommodated in the City's newly earmarked employment areas and as explained below, the future distribution of employment as estimated in this review, is partly determined by centres' capacity as well as the availability of new employment lands to support both in-centre and non-centre activities.

As shown in Table 14 and Figure 13 below, employment forecasts disaggregated by locality, which have been prepared by SGS Economics and Planning utilising Redland City Council's planning estimates and ABS data, show that Cleveland and Capalaba are expected to receive the greatest share of Redland City's employment growth over the period 2006-2031. Given the mixed industry precinct at Redland Bay (Redlands Business Park), and the intended use of the Thornlands investigation area for integrated employment purposes, coupled with reducing capacities elsewhere in the City, means that Thornlands and Redland Bay are also expected to accommodate significant employment growth (approximately 21% of the total increase) in the period 2006-2031.

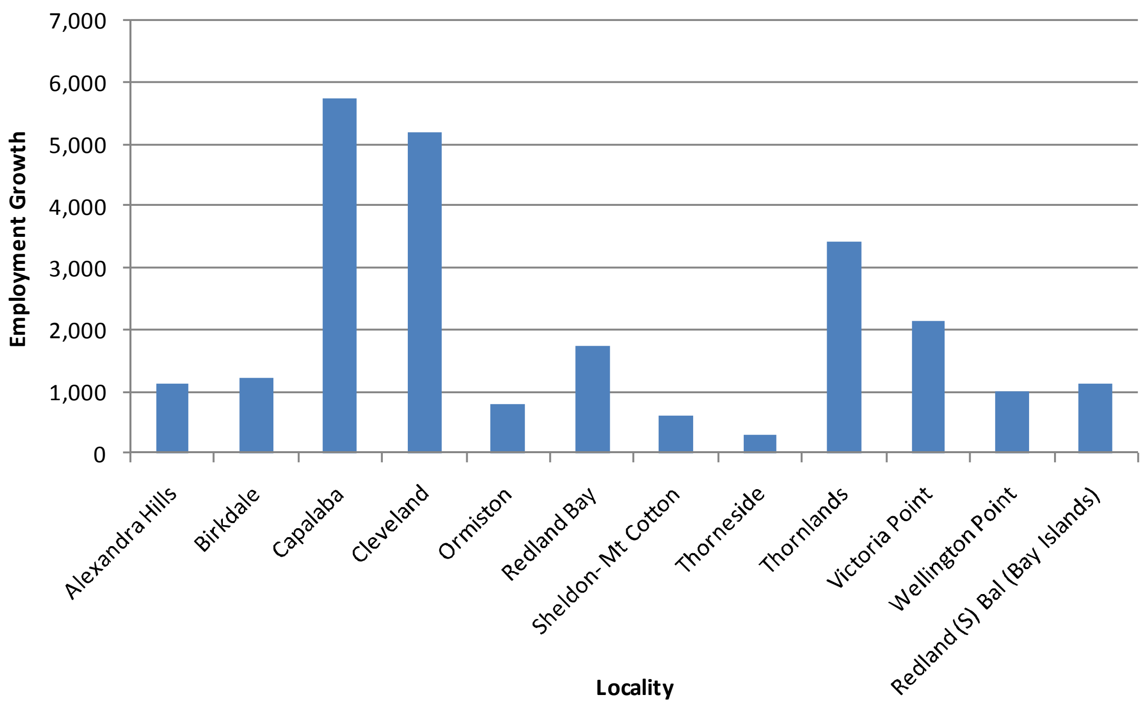
Of the estimated increase of 24,435 jobs over the twenty-five years to 2031, Capalaba is expected to account for 23% of this growth or approximately 5,740 jobs. This is followed by Cleveland with 5,196 jobs or 21% of Redland City's forecast employment growth to 2031. Thornlands is forecast to grow by 3,423 jobs (14% of the City's jobs growth) while Victoria Point is expected to house another 2,139 jobs or 9% of the total increase in employment between 2006 and 2031. The employment forecasts also show that other localities expected to accommodate significant increases in employment between 2006 and 2031 are Redland Bay (about 1,735 jobs or 7%) and Birkdale (approximately 1,214 jobs or 5% of the City's anticipated jobs growth over 25 years).

Table 14. Forecast Employment Change by Locality, Redland City, 2006-2031

	2006	2031	Change 2006-2031	% Change 2006-2031	% of Total Change
Alexandra Hills	2,415	3,558	1,143	47%	5%
Birkdale	1,743	2,958	1,214	70%	5%
Capalaba	8,033	13,773	5,740	71%	23%
Cleveland	8,231	13,428	5,196	63%	21%
Ormiston	1,088	1,894	806	74%	3%
Redland Bay	1,417	3,153	1,735	122%	7%
Sheldon- Mt Cotton	1,342	1,965	623	46%	3%
Thorneside	382	674	292	77%	1%
Thornlands	1,810	5,233	3,423	189%	14%
Victoria Point	2,945	5,084	2,139	73%	9%
Wellington Point	1,379	2,384	1,005	73%	4%
Redland (S) Bal	1,308	2,426	1,119	86%	5%
Redland City	**32,095**	**56,530**	**24,435**	**76%**	**100%**

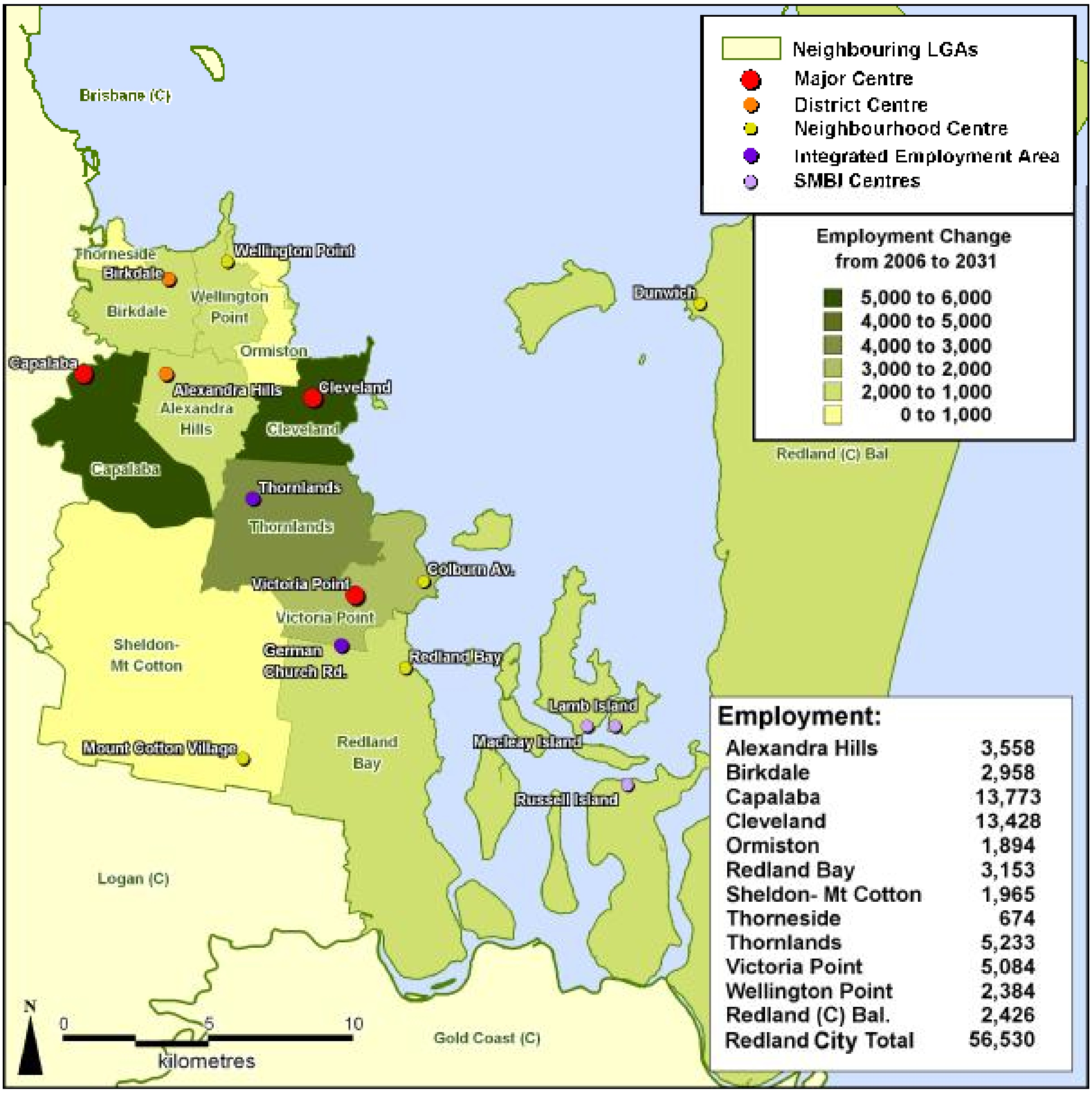
Source: Redland City Council with interpretations by SGS Economics and Planning

Figure 13. Forecast Employment Growth by Locality, Redland City, 2006-2031



Source: Redland City Council with interpretations by SGS Economics and Planning

Figure 14. Forecast Employment Growth by Locality, Redland City, 2006-2031



Source: SGS Economics and Planning

The anticipated demand for employment lands in Redland City, including in-centre, out-of-centre commercial and industrial employment land, is informed by the employment projections reported above. The demand for employment land in Redland City is the subject of the next section of this review.

6.2 Demand for Employment Land in Redland City's Activity Centres, 2006-2031

6.2.1 Calculating Demand for Employment Land: Key Considerations and Assumptions

Employment forecasts for Redland City can be converted into floorspace (and land) requirements by applying standard floorspace ratios to forecast employment growth.[7]

SGS has forecast employment demand, and therefore, the demand for in-centre employment land in Redland City by assuming that previous industry growth trends continue into the future, that Redland can accommodate a proportion of the wider region's employment demand, that, for key sectors (like retailing and other 'lifestyle' services for example) it will serve (or 'capture') employment demand in other parts of the region and that this will be partly due to planning and economic development policy interventions to help shape the types of industries that can be attracted or assisted to grow in Redland City. It also assumes that, consistent with Redlands Economic Development Strategy and the principles and objectives of the SEQ Regional Plan, Redland City will increase its rate of employment self-sufficiency from its current 52% to a rate of 60% by 2031.

In order to inform centres planning and development in Redland City over the next 25 years, employment forecasts have been disaggregated by locality. For each suburb or locality, employment forecasts have been broken down by industry, that is, retail and commercial employment is distinguished from industrial employment. Furthermore, for each locality in the City, forecast retail and commercial employment has been broken down into centre-based and non-centre based employment. By disaggregating the employment forecasts in this way, conclusions can be made with respect to the future role and function of existing activity centres and their place in the hierarchy, the need for new centres and the need for other employment generating lands such as industrial estates or integrated employment areas. Of the 24,435 additional jobs expected in Redland City between 2006 and 2031, it is estimated that approximately 11,200 (i.e. just under half) of those will be located in the City's centres. The breakdown in projected additional employment by each of the City's activity centres is shown below.

Estimating future employment by locality and employment by activity centre involved the following steps:

- City-wide employment projections were generated using information on projected population growth (sourced from Redland City Council's planning estimates) and assumptions about future labour force conditions and characteristics. This includes assumptions about Redland City's future labour force participation rate (which is expected to increase from 64% in 2006 to 68%

[7] In preparing this Centres Study Review, SGS Economics and Planning has applied industry accepted benchmarks of floorspace/employment and floorspace / land area ratios.

in 2031), the rate employment self-sufficiency (which is expected to increase from 52% in 2006 to a target rate of 60% by 2031) and unemployment (constant at the 2006 rate of 4.11%). The result is a higher ratio of total jobs to resident workers in Redland City in 2031 compared to the current situation.

- The employment forecasts are disaggregated by industry sector. Future employment by industry is calculated using a trend based model, which takes into account growth trends by industry sector, population projections and a custom made input-output table for Redland City. The future distribution of jobs by industry is also heavily influenced by Redland City Council's and the region's planning and economic development policy settings described earlier in this review. That is, that Redland City will continue to diversify its economic base into new 'knowledge-based' sectors of growth or new forms of production in traditional industries. The economic sectors that are recognised as being key to the region's future include knowledge based businesses in sectors such as professional business services and more knowledge intensive applications to existing industries such as food and beverage manufacturing as well as retail and tourism.

- The employment forecasts are then disaggregated by the twelve localities within Redland City. The distribution of future employment by locality is, in the first instance, based on information about the recent trends and the current distribution of employment in Redland City as reported in the ABS Journey to Work data.

- The future distribution of employment by locality is further refined after taking into consideration information provided by Council on supply-side factors, that is, the capacity of the City's various activity centres to accommodate future employment growth and associated development. Other factors taken into consideration are local and broader (SEQ) policy influences regarding the planning and development of existing and potential new employment areas in Redland City and the extent to which these centres or employment nodes can potentially accommodate future employment.

- Commercial and retail industry employment was separated from the overall employment forecast by industry developed above.

- In-centre retail and commercial employment is estimated by applying national benchmarks derived from land use surveys regarding industry-by-industry distribution of employment into centres and out-of-centre locations.

- Once future in-centre employment is estimated, the forecast commercial and retail employment that is out-of-centre is identified. This covers employment in large format retailing, home based employment and other non-centre based retail and commercial activity (e.g. commercial office functions associated with manufacturing plants in a light industrial area).

- Industrial employment is determined in a similar manner to commercial and retail industry employment by identifying and separating industrial based jobs from the overall employment by industry projections.

- Floorspace benchmarks are then applied to convert forecast employment to floorspace requirements. Site area benchmarks are then used to convert estimated future floorspace requirements to site area. Although averages are applied, it is acknowledged that in-centre retail and commercial floorspace uses will have varying land requirements depending on things like allowable plot ratios, building heights and development capacities.

6.2.2 In-Centre Employment and Floorspace Projections by Locality

Using the method outlined above (and as illustrated in the table below), it is estimated that between 2006 and 2031 approximately an additional 430,000 square metres of floorspace (GFA) will be required to support targeted jobs growth in Redland City's activity centres. That is, approximately 430,000 square metres of in-centre retail and commercial floorspace. This excludes out-of-centre retail and commercial and industrial floorspace requirements. In other words, it is the floorspace required to accommodate forecast employment located within the City's network of activity centres. The floorspace figures shown in the table are based on forecast jobs by location. Acknowledging that some of the floorspace required would be accommodated in local and neighbourhood centres, the majority would be accommodated in the City's Major and District centres consistent with the figures shown for each locality.

Table 15. Forecast Employment Growth and Activity Centre Floorspace Requirements, Redland City, 2006-2031

Locality	Employment 2006	Additional Employment, 2006-2031	Additional In-Centre Retail & Commercial Employment, 2006-2031	Additional In-Centre Retail & Commercial Floorspace (SQM), 2006-2031
Alexandra Hills	2,415	1,143	547	16,413
Birkdale	1,743	1,214	571	17,140
Capalaba	8,033	5,740	3,071	122,823
Cleveland	8,231	5,196	2,493	99,720
Ormiston	1,088	806	324	9,710
Redland Bay	1,417	1,735	647	25,886
Sheldon-Mt Cotton	1,342	623	118	3,554
Thorneside	382	292	104	3,120
Thornlands	1,810	3,423	1,083	48,714
Victoria Point	2,945	2,139	1,326	53,025
Wellington Point	1,379	1,005	505	15,141
Redland (S) Bal (Bay Islands)	1,308	1,119	478	14,330
Redland City	**32,095**	**24,435**	**11,266**	**429,574**

Source: Calculations by SGS Economics and Planning using data sourced from Redland City Council

Allowing for site area and buffer requirements, this projected additional in-centre floorspace requirements translates into approximately 107 hectares. However, it is important to note that this land area figure does not account for building heights and densities so the land area required in the City's activity centres could in fact be less depending on ultimate centre design. For this reason, it would be in the interests of Redland City Council to undertake a development capacity study of its Principal Activity and District Centres through master planning to identify how employment demand might best be accommodated from an urban design point of view.

Consistent with local (and regional) policy settings, the majority of the projected employment increase will be provided in the City's Major Centres zone. The Principal Activity Centres of Capalaba and Cleveland will accommodate the bulk of this demand. The Victoria Point Major Activity Centre in the south of the City will also accommodate some of this growth. The Redlands Business Park on German Church Road in Redland Bay is also expected to accommodate a significant share of growth over the period.

6.2.3 Non-centre Based Retail and Commercial Employment and Floorspace Projections by Locality

In addition to the forecast in-centre employment and associated floorspace requirements, it is estimated that another 75,800 square metres would be required to accommodate non-centre based retail and commercial employment in Redland City over the next 25 years. This includes retail and commercial activities such large format retailing, home-based businesses and commercial / office functions tied to manufacturing activities and lifestyle horticultural activities. Allowing for site area and buffer requirements, this translates into approximately 19 hectares of land required for non-centre based retail and commercial activity. Non-centre based retail and commercial employment forecasts and floorspace requirements are illustrated in Table 16.

The bulk of this non-centre retail and commercial employment growth and associated floorspace requirement is expected to be accommodated in the localities of Capalaba, Cleveland, Thornlands and Victoria Point.

Table 16. Forecast Employment Growth and Non-Centre Based Retail and Commercial Floorspace Requirements, Redland City, 2006-2031

Locality	Employment 2006	Additional Employment, 2006-2031	Additional Out-of-Centre Retail & Commercial Employment, 2006-2031	Additional Out-of-Centre Retail & Commercial Floorspace (SQM), 2006-2031
Alexandra Hills	2,415	1,143	97	2,896
Birkdale	1,743	1,214	101	3,025
Capalaba	8,033	5,740	542	21,675
Cleveland	8,231	5,196	440	17,598
Ormiston	1,088	806	57	1,713
Redland Bay	1,417	1,735	114	4,568
Sheldon- Mt Cotton	1,342	623	21	627
Thorneside	382	292	18	551
Thornlands	1,810	3,423	191	8,597
Victoria Point	2,945	2,139	234	9,357
Wellington Point	1,379	1,005	89	2,672
Redland (S) Bal (Bay Islands)	1,308	1,119	84	2,529
Redland City	**32,095**	**24,435**	**1,988**	**75,807**

Source: Calculations by SGS Economics and Planning using data sourced from Redland City Council

6.2.4 Demand for Industrial Land, 2006-2031

It is estimated that between 2006 and 2031 an additional 127 hectares will be required in Redland City for more traditional industrial purposes (including manufacturing/processing, transport/freight-oriented industry, general service industries (like construction and commercial services and repairs) and utilities). This is the land required, including land for employment and for required buffers, internal roadways, landscaping and easements to accommodate forecast industrial employment growth.[8] This is additional to the non-centre based retail and commercial land requirements referred to above (of approximately 19 hectares) and the in-centre floorspace requirements shown in Table 15.

However, in addition to the demand for industrial land, Redland will require an adequate buffer of industrial land to accommodate any unanticipated and significant increase in demand. As a rule of thumb, it is generally accepted that in any economy, there should be at least a 15 year buffer stock of industrial land to accommodate any unanticipated and significant jump in demand, or if for example, Redland City is able to capture more demand for industrial land from outside the region. This means that in order to accommodate any unanticipated and significant increase in demand

[8] This refers to the demand for land only and is irrespective of existing or potential future land capacity.

that could potentially occur over the coming 25 years, Redland City should have in reserve at least another 76 hectares of land for industrial purposes. This is the land area required to house employment and for necessary private and public domain allowances such as buffers and easements.

This bulk of anticipated demand and the associated requirement for surplus land to provide a 'demand buffer' for industrial employment is expected to be accommodated in the future Thornlands integrated employment area and Redlands Business Park at Redland Bay. Given the level of anticipated demand for industrial employment and limited capacity in the City's existing industrial parks, the planning required for the future Thornlands integrated employment area needs to be treated with some priority. This is further compounded by the demand for non-centre based retail and commercial employment as forecast for the Thornlands (as shown above).

Table 17 summarises Redland City's anticipated retail, commercial and industrial employment forecasts and associated floorspace and land requirements to 2031.

Table 17. Summary of Forecast Employment Demand and Land Requirements, Redland City, 2031

Employment (2006)	32,121
Employment (2031)	56,530
Additional Employment, 2006-2031	24,435
Additional Retail & Commercial Employment, 2006-2031	13,254
Additional In-Centre Retail & Commercial Employment, 2006-2031^	11,266
Additional In-Centre Commercial Floorspace (SQM) (2026)	429,574
Additional Out of Centre Retail & Commercial Employment, 2006-2031^	1,988
Additional Out of Centre Retail & Commercial Floorspace (SQM), 2006-2031	75,807
Additional Industrial Employment, 2006-2031	7,055
Additional Industrial Site Area (ha), 2006-2031	127 ha
Additional long-term industrial land supply/buffer stock*	76 ha

* This is in addition to the 127 hectares of industrial land required to accommodate forecast demand.

^ These figures are sub-sets of total additional retail and commercial employment, 2006-2031.

Source: Calculations by SGS Economics and Planning using data sourced from Redland City Council

7 Recommendations for Centres Planning and Development

7.1 Planning for Economic Development

The provision of suitable and sufficient land is required to accommodate Redland City's future economic and employment needs. At present (2006), Redland City is home to 32,121 jobs. Redland City's economic and employment strategies aim to increase the number of local jobs by around 24,435 over the next 25 years, for a total of around 56,530 jobs in Redland City by 2031.

Increasing the number and diversity of employment opportunities in Redland City will allow more residents the opportunity to work close to home thereby reducing travel to destinations outside the City for employment. This will facilitate an increase in self-containment of employment and the development of a more robust economic base. Redland City's Employment Development Strategy seeks to increase the level of employment self-containment from the current rate of 40% to a target of 60% by 2031. The employment and associated land forecasts contained in this Centres Study Review reflect this aim.

From a centres planning perspective, among others things, Redland City Council should seek to encourage:

- a network of multi-purpose activity centres throughout the City as key locations of economic activity;
- growth and consolidation of employment in the City's activity centres; and
- the establishment of integrated employment areas providing for a mix of economic activity.

Economic and employment activity is encouraged and supported within a network of multi-purpose activity centres throughout the City that recognises:

- Capalaba and Cleveland as Principal Activity Centres for the City;
- Victoria Point as a major activity centre serving the southern areas of the City;
- Alexandra Hills and Birkdale district activity centres;
- The potential future elevation of the Redland Bay neighbourhood centre to a district centre (when the required population catchment threshold is met in around the year 2026); and
- Other neighbourhood and local centres serving local catchments.

The majority of employment growth over the 25 years to 2031 will occur in the Principal Activity Centres of Capalaba and Cleveland and in activity centres and integrated employment areas at Thornlands and Redland Bay (the Redlands Business Park at German Church Road). This includes centre and non-centre based employment, and it is considered that a significant proportion of the non-centre growth (as well as some centre-based activity) could be accommodated in the City's designated integrated employment area at Thornlands.

The scale and expected distribution of employment growth in the City over the next twenty years has important implications for centres planning as well as for potential strategies which could be implemented by Council to reinforce and facilitate the important economic function of Redland City's network of activity centres and other designated employment nodes.

7.2 Centres Planning Principles

The 2001 Centres Study presents seven underlying principles for centres planning and development in Redlands. These are all soundly based principles. However, in light of recent policy developments, most notably the SEQ Regional Plan, it is considered that the planning principles could be refined moderately to reflect current local and regional policy settings.

It is suggested that the principles be presented as follows:

- **Diversity** – create centres and other networked nodes of activity providing for integrated employment, for a range of uses including but not limited to:
- An appropriate mix and scale of commercial and retail activity;
- Community service delivery;
- Employment;
- Meeting places;
- Multi-modal public transport;
- Recreation, culture, leisure and entertainment;
- Higher density residential development;

- **Vibrant and Vital** – create centres that are vibrant and vital by:
- Having a range of uses present to encourage, social and cultural interaction and exchange;
- Encouraging uses that allows for vibrancy after core business hours (i.e. night-time economy);
- Being a focus for public transport;
- Being a focus for higher density, transit-oriented development and trip generating activities.

- **Economic Functioning** – Redland City's activity centres have an important economic function including:
- Providing sufficient land in suitable locations for economic advancement and job creation;
- Supporting the delivery of meaningful and sustainable employment opportunities for the City;
- Providing an environment for business and employment growth in new and emerging knowledge-based industries;
- Delivering the best employment outcomes for Redlands by encouraging high self-containment of employment within Redland City's boundaries;
- Providing a network of identifiable locations throughout the City for economic interaction and exchange; and
- Providing retailing at sustainable levels to meet identified catchment requirements.

- **Planning and Urban Design** – provide/create centres that:
  - Encourage the growth and consolidation of retail and commercial activity in centres which maximise their accessibility by a range of transport modes, both private and public, including walking and cycling;
  - Are quality spaces;
  - Have a synergy of uses;
  - Have positive character and identity;
  - Integrate with compatible adjoining land uses including non-centre based retail and commercial uses;
  - Discourage the demand for isolated out-of-centre development;
  - Avoid and mitigate impacts on adjoining sensitive land uses.

- **Linkages and Networks** – within and between the network of centres and surrounding areas need to be considered with an emphasis on the provision of public transport, cycling and walking as a mode of movement.

- **Ecological Sustainability** – incorporate the principles of ecologically sustainable development into the planning, design and operation of Redland City's activity centres and other networked nodes of employment.

- **Flexibility –** ensure the provision of flexibility with respect to the future planning of centres within a recognised, integrated network without compromising other key planning principles.

7.3 Implications for Centres Planning

7.3.1 Major Activity Centres

From a planning and development perspective, it is considered that Redland City's Major Centre zone provides sufficient opportunity to accommodate key concentrations of economic and employment activity based on higher order retail, commercial, residential, administrative, community and entertainment uses within the City to 2031.

Capalaba Principal Activity Centre

Capalaba (and Cleveland) is recognised in the SEQ Regional Plan as Principal Activity Centre serving a catchment of regional significance through the accommodation of key concentrations of economic and employment activity. It is intended that Capalaba to continue to accommodate major retail, commercial, community, administrative, recreational and associated central place activities.

Section 6 of this review shows that in order to accommodate employment forecasts for Capalaba, an additional 123,000 square metres of in-centre retail and commercial floorspace would be required (that is, over and above existing in-centre retail and commercial floorspace). At a broad level, information held by Redland City Council shows that there is approximately 8 hectares of land with the opportunity for intensification within the existing centre use in Capalaba. Additional to this is 2.4 hectares of vacant land and another 1.2 hectares of land with redevelopment potential. Together, this totals approximately 11.5 hectares or 115,000 square metres. While this does not allow for required buffers, it can be assumed that, depending on Council policy with respect to building heights and densities in the Capalaba Major Centre, the forecast employment could well be accommodated.

It is recommended that Redland City Council undertake a Capalaba Centre development capacity study as part of master planning to pro-actively plan for the scale and intensity of forecast employment demand consistent with the City's underlying centres planning principles. This includes consolidation of employment in the City's activity centres, protecting and enhancing urban character and identity, promoting access and mobility, providing essential services and facilitating employment creation.

The forecasts presented in this review also show that growth in non-centre based retail and commercial employment over the next 25 years will generate demand for around 21,700 square metres of floorspace in Capalaba. Consistent with local planning policy provisions, it is recommended that Redland City Council continue to support large format retail and commercial activities locating in areas zoned for these uses peripheral or adjacent to the Major Centre Zone at Capalaba.

Cleveland Principal Activity Centre

Like Capalaba, Cleveland is recognised in the SEQ Regional Plan as Principal Activity Centre serving a catchment of regional significance through the accommodation of key concentrations of economic and employment activity. It is intended that Cleveland to continue to accommodate major retail, commercial, community, administrative, recreational and associated central place activities.

Section 6 shows that in order to accommodate employment forecasts for Cleveland, approximately an additional 100,000 square metres of in-centre retail and commercial floorspace would be required (that is, over and above existing in-centre retail and commercial floorspace). Information held by Redland City Council shows that there is approximately 11 hectares of land with the opportunity for intensification within the existing centre use in Cleveland. Additional to this is 3 hectares of vacant land and another 3.2 hectares of land with redevelopment potential. Together, this totals approximately 17 hectares or 170,000 square metres. While this does not allow for required buffers, it can be assumed that, depending on Council policy with respect to building heights and densities in the Cleveland Major Centre, the forecast employment could well be accommodated.

It is estimated that growth in non-centre based retail and commercial employment over the next 25 years will generate demand for around 17,600 square metres of floorspace in Cleveland. Consistent with local planning policy provisions, it is recommended that Redland City Council continue to support large format retail and commercial activities locating in areas zoned for these uses peripheral or adjacent to the Major Centre Zone at Cleveland.

Victoria Point Major Activity Centre

In order to accommodate employment forecasts for Victoria Point, an additional 53,000 square metres of in-centre retail and commercial floorspace would be required (that is, over and above existing in-centre retail and commercial floorspace). Information held by Redland City Council shows that there is approximately 25 hectares of land with the opportunity for intensification within the existing centre use in Victoria Point. This consists entirely of the Victoria Point shopping centre.

As noted in this review, the RPS recognises the Principal Activity Centres of the SEQ Regional Plan within the City's Major Centres Zone. This includes Capalaba and Cleveland. The RPS also includes Victoria Point within the Major Centre zone. This reflects the recent and forecast population growth in Victoria Point and its wider catchment, particularly to the south (see Section 5.3 of this review), and the planned role and function of Victoria Point to continue to accommodate the weekly shopping needs of its catchment of less than 50,000 people.

Further supporting designation of the Victoria Point centre as a Major Centre is its accommodation of key concentrations of employment, government administration, entertainment facilities, potential for residential intensification on adjacent lands and high accessibility to the regional public transport network. This should be reflected in the SEQ Regional Plan through designation of the Victoria Point centre as a Major Centre.

In support of the view that Victoria Point be recognised as a Major Centre, Redland City Council prepared a Gross Floor Area (GFA) analysis for the Victoria Point Centre. This was prepared in response to the former Office Of Urban Management (OUM) request that further information be provided on key attributes of the Victoria Point to support Council's request that it be included as a Major Centre in the SEQ Regional plan centre consistent with criteria used by the OUM to assess centres as part of the SEQ Regional Plan.

With the exception of an additional category for 'other services', the output produced in the form of a summary table (see below) matches the categories with those of an additional information request by the former OUM when Council made its original submission. The table summarises data for total number of premises for each category, total GFA for each category, percentage of space occupied by each category for number of premises and floor space, the total number of premises within the centre along with the total GFA of the centre. It shows that there are a total of 242 premises within the centre and a total GFA of 67,526.5 square metres. Retail occupies the highest percentage of premises at 56.61% and floor space at 66.48%. After retail there are a number of categories that occupy between 8.6-11.16% of the premises in Victoria Point Centre. These categories are Other Services (11.16%), Office (10.33%), Medical Facilities (8.68%) and Cultural and Entertainment (9.09%). Of these categories Cultural and Entertainment occupy the highest percentage of floorspace at 15.6% followed by Other Services (6.61%), Medical Facilities (5.32%) and Office (4.72%).

Table 18. Victoria Point GFA Summary

Category	No. of Premises	GFA M2	Percentage of Premises	Percentage of Floor space
Administrative	8	678	3.31%	1.00%
Cultural and Entertainment	22	10,533.5	9.09%	15.60%
Education	2	179	0.83%	0.27%
Medical Facilities	21	3,593	8.68%	5.32%
Office	25	3,188	10.33%	4.72%
Retail	137	44,893	56.61%	66.48%
Other Services	27	4,462	11.16%	6.61%
Total	**242**	**67,526.5**		

Source: Redland City Council

Victoria Point should be considered for inclusion within the SEQRP as a Major Centre to recognise its planned sub-regional role and function.

7.3.2 Other Activity Centres

District Centres

According to the RPS, Birkdale and Alexandra Hills are District Centres which provide for the commercial and retail needs of surrounding district catchment populations of approximately 15,000 persons.

The RPS states that District Centres serve catchment populations of approximately 15,000 persons. By 2031, Birkdale and Alexandra Hills will be nearing populations of around 17,500 and 18,900 respectively. This remains well below the catchments required of Major Centres like Capalaba and Cleveland and as such, both Birkdale and Alexandra Hills should continue to serve their District Centre role.

The RPS currently recognises Redland Bay as a Neighbourhood Centre. The RPS states that District Centres serve catchment populations of approximately 15,000 persons. Redland Bay's population is expected to reach 15,000 by the year 2026 and about 16,000 by the year 2031. It also serves as a gateway centre to the Southern Moreton Bay Islands providing some of the higher order retail and commercial services to the Island community. While a future catchment analysis is beyond the scope of this review, based on the population and employment forecasts, benchmarks regarding centre catchments, the role of the centre in providing some of the higher order services to the Southern Moreton Bay Islands and information on centres capacity reported in latter sections of this review, it is considered that the Redland Bay Neighbourhood Centre could be 'promoted' in the hierarchy to a District Centre but not until the population threshold necessary to support a District Centre is reached (i.e. around the year 2026).

Neighbourhood Centres

According to the RPS Neighbourhood Centres provide for neighbourhood commercial and retail needs of a catchment population generally up to 7,500 persons, except Mount Cotton Village and Colburn Avenue - Victoria Point where the catchment size is reduced to reflect locational circumstances. Retail and commercial activity within these centres is to encompass mini-markets, specialty shops, and limited commercial premises. According to the RPS, full-line supermarkets are inconsistent with the intended role and function of these centres and accordingly are not considered appropriate.

Under the 2001 Centres Study, Local and Neighbourhood Centres have the same classification. The March 2006 Redlands Planning Scheme classifies them separately. Therefore, the Neighbourhood Centres located at Wellington Point, Redland Bay, Mount Cotton Village, Dunwich and Colburn Avenue - Victoria Point, which are identified in the March 2006 RPS are not reflected in the 2001 Centres Study.

It is recommended that the role and function of Neighbourhood Centres as stated in the RPS be reflected in all future policy, planning and development of centres in Redland City.

Local Centres

The Redlands Planning Scheme identifies a number of local centres throughout the City which are intended to serve the local daily convenience shopping needs of local residents. Section 5 of this review presented population projections for each locality in Redland City to 2031. This showed that of the expected increase of 49,748 people between 2006 and 2031, 19% of this growth (around 9,640 people) would be accommodated in Thornlands followed by the Southern Moreton Bay Islands (7,977 or 16%) and Victoria Point (6,358 or 13% of total growth).

Under the RPS, the Emerging Urban Community Zone has been established to identify and ensure the sustainable integration of planning and development for the growth areas located within this zone. The emerging communities identified under the RPS include, among others, South East Thornlands and Kinross Road, Thornlands. No growth areas are specifically mentioned in the 2001 Centres Study. However, the 2001 report does make reference to new residential growth areas to be supported and serviced by convenience store/s and local shopping centres.

It is considered that Redland City Council will need to plan and designate land for local centres within these areas, consistent with local settlement patterns and the timing of that settlement over the next 25 years. For each area, a structure plan is to be completed in accordance with the Planning Scheme. The structure plan will inform issues and constraints, identify areas and subsequent determination of land uses and associated infrastructure including local centre requirements.

7.3.3 Integrated Employment Areas

Thornlands Integrated Employment Area

As noted in this review, preliminary investigations undertaken on behalf of Council in June 2005 identified a large site of approximately 550 hectares at Thornlands as potentially suitable for the establishment of a major integrated employment area, primarily providing for a range of compatible commercial, retail, industrial, educational and recreational uses. Further investigation is required to determine the capacity of the site to accommodate these employment and other uses.

In the interim, the Redlands Planning Scheme identifies and provides for the protection of this area pending more detailed investigation of the area for the establishment of a major integrated employment area. This is reinforced in the SEQ Regional Plan through designation of the area as a Future Growth Area.

Given the demand for industrial land and non-centre based retail and commercial employment lands in Redland City, further investigations of the Thornlands IEA should be progressed as a matter of priority. Council could consider splitting the site into two parcels of land for planning purposes. Reconsideration of the site’s boundaries and more detailed investigation of the net developable land that lies within the relatively less constrained eastern portion of the site would be required before any decision can be made on its economic future.

Redlands Business Park, Redland Bay

Council has approved a proposal for the establishment of an integrated employment centre at German Church Road in Redland Bay consistent with the adopted Redlands Business Park Structure Plan (October 2007) prepared by Jensen Bowers. The Redlands Business Park is 43.6 hectares in total with approximately 23 net hectares being made available through a structure plan for employment uses to be developed over four stages. An underlying objective of the structure plan is to facilitate opportunities for diverse, dynamic and sustainable employment. The structure plan proposes a mix of land uses including Low Impact Industry, General Industry and Centre uses.

The Redlands Business Park at German Church Road will provide for a mix of uses and a range of lot sizes including light industrial, general service and compatible indoor recreational activities serving the new and expanding residential areas of the southern part of the City and the Southern Moreton Bay Islands. The structure plan for the Redlands Business Park includes a general industry zone, a low impact industry zone and habitat area.

7.3.4 Out-of-Centre Development

The South East Queensland Regional Plan actively discourages out-of-centre development. It is considered that Redland City Council, through planning and infrastructure controls, should provide for a managed, supply-led approach to large format commercial and retail activity consistent with identified demand. This requires forward forecasting and the provision of supply well ahead of anticipated demand to ensure that the general direction of large format retail and commercial development is appropriately contained at or peripheral to activity centres.

Out-of-centre development is strongly discouraged, although developments such as large format (‘bulky goods’, ‘big box’ or ‘category based’) retail stores on stand-alone sites may be considered acceptable if and only when a net community benefit can be clearly established (over and above a centre / near centre location). Such out-of-centre locations must be able to prove the same or superior performances as a centre / near centre location with suitable accessibility to provide employment, to optimise infrastructure utilisation and to manage travel demand by utilising public transport, walking and cycling and moderating car use. They must establish that there will be no detrimental effect on public and private investment in, or on the economic performance of the City’s multi-purpose activity centres. And they must demonstrate that certainty of investment and employment, and a diversity of services and facilities in centres will be maintained.

The Redlands Planning Scheme controls that relate to discouraging out-of-centre development confirm the strategic intent of RCC, which is to encourage retail and commercial development at the edge or adjacent to designated centres.

Because of their intrinsic characteristics and requirements, large format retail activities often cannot be located in designated multi-purpose activity centres. Acknowledging this, and Council’s policy that out-of-centre development be discouraged, opportunity is provided through the Planning Scheme for the establishment of large format (‘bulky goods’, ‘big box’ or ‘category based’) retailing at the edge of the City's major activity centres. Specifically, large format commercial and retail activity is encouraged to occur in the following locations:

- within the area included in the Commercial Industry Zone adjoining Capalaba Principal Activity Centre to the east and south-east; and
- within the area included in the Commercial Industry zone adjoining the Cleveland Principal Activity Centre to the west.

The Integrated Employment Area identified south of Boundary Road, Thornlands provides a suitable location for the establishment of future large format commercial and retail activity. Further investigation of and planning for this area for future integrated employment purposes should be a short-term priority for RCC.

7.4 Centre Strategies / Interventions

Consistent with the principles and objectives of the South East Queensland Regional Plan, planning for the growth and development of Redland City's activity centres should be framed to encourage and facilitate the growth and consolidation of retail and commercial activity in centres which maximise their accessibility to deliver the best employment outcomes for Redland City. With this in mind, it is recommended that the following actions be pursued by Council to facilitate centres planning and development and the economic development of the City over the next twenty-five years.

1. Strategic Framework and Centres Hierarchy

1.1. Integrate the centres planning principles presented in this review into Council policy to ensure consistency with the South East Queensland Regional Plan.

1.2. Revise the Redlands Planning Scheme to provide for the potential elevation of the Redland Bay Neighbourhood Centre to a District Centre when the required population catchment threshold is met (estimated to be around the year 2026).

1.3. Investigate the role and function of the Thornlands Integrated Employment Area within the City's activity centre network through detailed investigation and structure planning of this area.

1.4. Investigate land for local centres through structure planning of South East Thornlands and Kinross Road consistent with future local settlement patterns.

2. Activity Centres Place Management and Economic Vitality Strategies

2.1. Research, design and implement appropriate place management strategies to guide the growth and development of Cleveland and Capalaba as Principal Activity Centres. Place management strategies are to be cognisant of and responsive to local structure plans. (It is expected that place management would form an integral component of the Capalaba Centre Master Plan project).

2.2. Prepare a Capalaba Economic Vitality Strategy as key input / complement to the Capalaba Master Plan. This would include investigation of opportunities / need for an outdoor retail and entertainment precinct, bulky goods (frame) precinct, major department store, professional services, etc.

2.3. Target particular industry sectors to consider Capalaba as an investment location. Target sectors include the higher value components of professional business services, property services, ICT and media/creative industries, finance and hospitality. Investment attraction strategies will complement the Redlands Marketing Plan (and the Economic Development Strategy); new business start-ups and relocations to be monitored and promoted by Council.]

3. Investment Attraction to Promote and Facilitate Knowledge-based Industries

3.1. Prepare a knowledge-based industry audit and strategy for Redland City. Council could pro-actively define and promote knowledge-based industries (KBIs) as they apply to Redland City's historic industry strengths and emerging opportunities.

3.2. Develop a professional business services investment attraction and development plan that identifies the type of office businesses being targeted for Redland's Principal and Major Activity Centres and the type of infrastructure / facilities required. Findings would complement and inform Council's other investment attraction strategies and the Redlands Marketing Plan, and feed into local structure plans

3.3. Implement urban design and infrastructure measures (as part of the master planning processes) designed specifically to attract knowledge workers to Capalaba and Cleveland. Critical infrastructure considerations for knowledge-based businesses and workers include cultural and recreational infrastructure, a full range of retail facilities and high levels of urban amenity.

4. Integrated Employment Areas

4.1. Use the information contained in the Redlands Business Park Structure Plan as the basis for investment attraction to the integrated employment area on German Church Road.

4.2. Prepare a land use planning and employment strategy for the integrated employment area investigation land at Thornlands. This will include consideration of reconfigured / reduced site boundaries to account for conservation lands and detailed investigation of the net developable land that lies within the relatively unconstrained portions of the site.

4.3. Determine the suitability of a tertiary education facility on land in the City's integrated employment investigation area. Alternative sites within the IEA would be considered on their merits and investigations would be cognisant of the City's existing and already planned / committed facilities.

5. Establish and Monitor Centres' Development Capacity

5.1. Quantify and monitor commercial development capacity in Redland City's Major Activity Centre zone. Centres' development capacity should be monitored by Council. It is recommended that Council take a pro-active approach to the identification and development of key/strategic sites consistent with local centres planning principles. This should inform, for example, the Capalaba Centre Master Plan project.

5.2. As part of the commercial development capacity study and master planning processes, identify and nominate key development and redevelopment sites in the City's Major Activity Centres. This will include the identification of key sites currently held by Council, some of which are in prime development/redevelopment locations.

5.3. Council will promote future development and redevelopment potential consistent with the City's underlying principles. This includes consolidation of employment in the City's activity centres, protecting and enhancing urban character and identity, promoting access and mobility, providing essential services and facilitating employment creation.

6. Monitor Progress against Employment Targets

6.1. Track estimated employment growth in Redland City against the annual jobs target identified in this Centres and Employment Review. The jobs tracking could be undertaken every five years in line with the ABS Census or annually, using estimates from the ABS Labour Force Survey.

6.2. Track and review Redland City's rate of employment self-sufficiency and employment self-containment. This would be undertaken in conjunction with the jobs target review.

6.3. Audit the number and type of home-based businesses in Redland City and develop a home-based business development strategy for Redland City. Identify what home-based businesses require including live-work space, graduation space (e.g. incubator/managed workspace), education/research, business services and business support.

7. Out-of-Centre Development

7.1. Undertake a comprehensive demand and supply analysis of large format ('out-of-centre') commercial and retail land in Redland City. In light of study findings, ensure the identification and provision of land in suitable locations well ahead of anticipated demand to ensure that the general direction of large format retail and commercial development is appropriately contained at or peripheral to Redland's activity centres.

7.2. Update the large format retail demand and supply analysis on a regular basis (say every two years) to ensure applicability in light of continually evolving retail / commercial development trends.

7.3. Establish assessment criteria to determine the net community benefit / cost of proposed out-of-centre retail / commercial development in Redland City. Once established, formalise the assessment criteria in Council policy. Review assessment criteria on a regular basis (say every two years) to ensure applicability in light of continually evolving retail / commercial development trends. The assessment criteria could incorporate consideration of, among other things, employment outcomes and infrastructure utilisation as well as implications for managing travel demand. Criteria must also address the potential effect on public and private investment in centres and the economic performance of the City's centres. Finally it must consider the implications for the provision of a diversity of services and facilities in Redland's activity centres.

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