Redland City Centres & Employment Strategy Review

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urbis

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Executive Summary

Redland City Council engaged Urbis to undertake a review of the Redland City Centres and Employment Strategy (2010). The primary purpose of the review was to provide recommendations and actions to strengthen the Strategy and facilitate economic growth in the City in light of more contemporary economic development policy, investment information and employment data from the 2011 census. The review is a key background study to inform the new Redlands Planning Scheme (2015).

This review has identified that the key regional economic competitive advantages of the City relate to amenity and lifestyle making it an attractive place to live, high quality primary and secondary education facilities, a growing market for health and social assistance driven by the ageing population, and proximity to extensive and diverse natural environments like Moreton Bay and its islands.

Conversely, key regional economic comparative disadvantages include the limited supply of unconstrained land and therefore limited opportunity to provide regionally affordable land for employment purposes. The City is also isolated from major freight routes when compared to its major competitors.

The Centres and Employment Strategy (2010) has a strong alignment with the City's regional economic competitive advantages and its comparative disadvantages remaining relevant to facilitate and plan for a strong and diverse economy. This review does however provide a range of key findings and recommendations to realign and strengthen the Strategy.

The key findings and recommendations of this review are as follows:

DEMOGRAPHICS TRENDS

- Redland City has an ageing population with only 8,500 of the additional 42,500 new residents forecast for the City to 2031 being in the prime working age of 20-64. This will result in a reducing labour force participation rate in the City.

- Per capita income across Redland City is strongest at Wellington Point, Ormiston, Sheldon-Mt Cotton and Cleveland, with the major centres of Capalaba and Victoria Point recording comparatively lower average income levels.

- Residents that work as managers, professionals and community and personal service workers increased as a proportion of the total workforce over the last 10 years.

- To realign the Strategy to address the ageing of the population the following recommendations are made:

1. Increase employment opportunities for the younger demographic to encourage an inflow of younger working age;

2. Concentrate on the level of local job growth rather than self-sufficiency;

3. Encourage growth in industries that attract an inflow of labour force;

4. Potential to develop an employment precinct in Birkdale to attract working age residents within Brisbane.

INDUSTRIAL LANDS REVIEW

- This review has confirmed the finding of the Centres and Employment Strategy (2010) that the City's existing network of industrial lands provide sufficient opportunity to accommodate forecast demand for industrial land to 2031. Recent demand for industrial land (2006-2011) lower than that forecast to be required by the Strategy.

- In the longer term, there is opportunity to more efficiently utilise existing industrial lands in the City encouraging re-development of underutilised industrial sites through amending the site coverage, height and setbacks in the Planning Scheme to align with best practice in the region. In addition, consideration should be given to focusing investment strategies on population serving industrial activity that requires being located within the City.

- Should Council seek to provide an additional industrial area to attract export orientated industry this review has identified a set of essential criteria for a regionally competitive export orientated industrial area. By reviewing the essential criteria this review suggests any new area should be in close proximity to Capalaba, located on a major existing piece of infrastructure with ease of access to the Brisbane Port. A site that potentially meets the criteria exists in Birkdale and could be investigated further.

- The former Thornlands Integrated Employment Investigation Area does not meet the essential criteria for a successful regionally competitive industry area. Establish a portion of the area as a Rural Enterprise Precinct in line with the Rural Futures Strategy (2012) based on an assessment of the land requirements for this precinct.

INVESTMENT PROFILE

- An analysis of projects that are recently completed, proposed or in the early planning phase shows that six of the top ten projects by estimated value are within the Health Care and Social Assistance industry.

- Given the ageing profile and socio-economic characteristics of the City there is a strong level of investment within the Aged Care and Social Assistance industry. Investment in this industry is expected to continue to outweigh the other industries as the population of the City continues to age. As a result of this ageing population, it is expected employment within this industry sector will surpass the Retail sector as the greatest employment industry in the City.

- Other property sectors with significant future investment include Education and Training and Mixed Use Projects (residential with retail and commercial).

- Non-employing businesses comprise the majority of businesses in the City and are dominated by individuals working in the construction industry. This suggests a high level of sub-contractor trade workers.

- There were around 112 additional businesses in 2011 compared to 2009 in the City. Of these a large proportion comprised non-employing businesses within the Professional, Scientific and Technical Services, Financial and Insurance Services as well as Administrative and Support Services.

EMPLOYMENT ANALYSIS

- Total employment within the City has grown from 32,095 jobs in 2006 to 35,593 jobs in 2011. This represents local employment growth of 3,498 or 11%. The majority of employment growth within Capalaba (1,484 jobs), Victoria Point (769 jobs) and Cleveland (513 jobs).

- The top five growth sectors include Health Care and Social Assistance (1,235 jobs), Professional, Scientific and Technical Services (565 jobs), Accommodation and Food Services (445 jobs), Education and Training (411 jobs) and Construction (337 jobs). The top five growth sectors made up 85% of the total employment growth in the City from 2006 to 2011.

- The top five growth industries (by four digit ANZSIC Code) between 2006 and 2011 included Hospitals (417 jobs), Computer System Design and Related Services (333 jobs), Takeaway Food Services (314 jobs), Primary Education (204 jobs) and combined Primary and Secondary Education (195 jobs).

- Industries that have grown as a result of an ageing population and are within the top 30 industries include Hospitals (417 jobs), Other Social Assistance Services (285 jobs), Aged Care and Residential Services (188 jobs), Pharmaceutical, Cosmetic and Toiletry Goods Retailing (93 jobs) and Other Allied Health Services (78 jobs).

- The employment growth experienced in the City from 2006 to 2011 is lower than forecast by the Centres and Employment Strategy by 800 jobs. This period has represented a relatively slow employment growth period across the region. Going forward, employment growth is forecast to decline with the ageing population and subsequent declining resident workforce.

- It is recommended that the overall employment forecasts to 2031 of the Strategy be slightly adjusted to account for slow employment growth over the last census period from 50,009 in 2031 to 48,908. To address the ageing of the local workforce it is recommended to encourage an in-flow of working age residents by providing regionally attractive employment. It should be noted that the revised employment forecasts do not take account of a reinvigorated rural economy as proposed by the Rural Futures Strategy or providing a new export orientated industry area at Birkdale.

- The City workforce increased from 61,733 in 2006 to 67,959 in 2011. This represents growth in the workforce of 6,226 or 10%.

- The City rate of employment self-sufficiency (the proportion of working residents to the number of City jobs) improved slightly between 2006 and 2011. The City was the only local government area out of Gold Coast, Brisbane and Tweed to record any improvement in the self-sufficiency rate over this period. This builds on steady improvement in employment self-sufficiency in the City that has seen it increase from 46.5% in 1996 to 50% in 2001 and 52% in 2006. This is a positive sign for a growing economy.

- The overall City rate of employment self-containment (the proportion of working residents that are employed in the City) remained the same as in 2006 at 40%.

- The City experienced a slight decline in employment diversity from 2006 to 2011. The City has moderate employment diversity compared with other local governments in SEQ.

ROLE AND FUNCTION

- Capalaba is predominately a retail and commercial destination accommodating the highest number of jobs of any of the City suburbs. Capalaba has a very high proportion of Retail Trade (26.7%) and Manufacturing (12.1) employment.

- Cleveland is primarily positioned as the administrative hub of the City and accommodates the highest number of jobs per hectare in the City at 7.4. Cleveland has high proportions of Medical (Health Care and Social Assistance), Administration (Public Administration and Safety) and Retail Trade jobs. Collectively, these industries account for almost 44% of employment in Cleveland, as would be expected in a Principal Regional Activity Centre.

- A significant proportion of employment growth in the City is forecast to be delivered by centre development. To realise forecast employment centre consolidation is required within Capalaba and Cleveland. Investment strategies and specific implementation plans together with associated marketing need to be developed to encourage private investment.

- Out of centre development should be developed only where required (e.g. essential convenience requirements).

RECOMMENDATIONS

This review provides the following overall recommendations with respect to strengthening the Centres and Employment Strategy:

  – Increase employment opportunities for the younger demographic. Encourage an inflow of younger working age;

  – Concentrate on level of jobs growth rather than self-sufficiency;

  – Encourage growth in industries that attract an in-flow of labour force;

  – Leverage from specific educational and health opportunities;

  – Consolidate centre growth and only provide out of centre development where deemed necessary;

- Investigate Birkdale opportunity as an employment precinct;
- Determine the land requirement for a Rural Based Enterprise Precinct;
- Prioritise key actions to realign the Strategy;
- Identify resource capacity and capability for prioritised actions; and
- Review preferred industry sectors for investment and identify required actions and projects.

In undertaking this review a number of insights and opportunities have been unearthed to facilitate increased economic growth across the City. In relation to this, Council should revise its Economic Development Strategy to focus on leveraging the City’s competitive and comparative strengths aligned with resource capacity and capability. This revision should identify clear catalytic projects that include a funding strategy.

1 Introduction

1.1 BACKGROUND AND STUDY OBJECTIVES

In 2010, Redland City Council partnered with SGS Economics and Planning to undertake a review of the then current Centres Study and revised it to align with the South East Queensland Regional Plan 2009-2031. The Strategy assessed the effect of the removal of the Thornlands Integrated Employment Investigation Area from the region's strategic framework and Urban Footprint.

As a result of Redland City Council reviewing the Redland Planning Scheme (RPS), Council has engaged Urbis to review the current strategy having regard for the recently released 2011 Census of Population and Housing. The employment review study will form a key input into the preparation of the new Redlands Planning Scheme and will target the following objectives:

- Identify Redland's competitive advantages with respect to regional economic development;
- Review and assess the growth sectors of the Strategy in light of the City's regional competitive advantages;
- Identify education and skill requirements related to the City growth sectors;
- Utilising 2011 Census data to
  - Identify the total employment in the City by industry sector and the employment self-sufficiency rate this represents;
  - Identify demographic trends and the implications for future employment in the City
- Provide a detailed demand analysis for integrated employment uses in the City based on the review of growth sectors from the City from 2011 to 2026 and in the longer-term 2026-2031;
- Identify and assess a range of opportunities/incentives to increase the utilisation of the City's integrated employment areas through planning strategies, such as increased site coverage and allowing greater building height and identifying any additional land requirements;
- Form a key input into the preparation of the strategic framework for the new SPA compliant RPS; and
- Review the consistency of the Strategy with the outcomes sought through the Redlands 2030 Community Plan.

1.2 REPORT STRUCTURE

This report focuses on the recent resident demographic trends as they relate to employment, the review of any recent employment generating projects within Redland City and identifying the need for providing significant industrial/employment land within Redland City. Furthermore, it will review the current employment profile of Redland City, how this has changed from the previous Census and the current travel patterns and destinations of the local workforce.

Following this **Background and Study Objectives** section, the Redland City Employment Strategy Review will be structured as follows:

- **Section 2 Demographic Trend Analysis:** this section will review the historic and current Census of Population and Housing information released by the Australian Bureau of Statistics. It will analyse the historic, current and future key demographic characteristics and analyse how these relate to future employment opportunities within Redland City.
- **Section 3 Industrial Lands Review:** this section reviews the decision to remove the former Thornlands Enterprise precinct in light of recent growth trends and future industrial land requirements.

It also considers growth opportunities within Redland City as a result of the 2012 Redlands Rural Futures Strategy prepared by AECOM in association with Think Food and Energetic Communities.

- **Section 4 Investment Profile:** the investment profile section identifies the investment profile trends, the future investment pipeline as well as an analysis of the change of business counts over the last three years. It is important to consider the investment profile of Redland City in order to identify key employment industries for the future.

- **Section 5 Employment Analysis:** this section of the report reviews the most recent demographic data released in the 2011 Census of Population and Housing and compares it to the outcomes of the 2010 Redland City Centres and Employment Strategy.

- **Section 6 Future Role and Function Opportunities:** this section reviews the current role and function of each statistical area within Redland City as per the South East Queensland Regional Plan 2009-31. For each statistical area it analyses employment change between the 2006 and 2011 Censuses, identifies the employment quotient for each industry at a 1 digit ANZSIC level as well as reviews the top 30 growth industries at a 4 digit ANZSIC level.

- **Section 7 Key Insights and Recommendations:** this section provides a summary of the previous sections and results in a series of recommendations in relation to future employment within Redland City.

1.3 REPORT LIMITATIONS

As the report involves projections, it can be affected by a number of unforseen variables. It represents for the party to whom it is addressed, the various estimates of Urbis Pty Ltd but no assurance is given by Urbis Pty Ltd that the projections will be achieved.

The assessment undertaken has been done on the basis of information available at this time as well as assumptions made within the 2010 Redland City Centres and Employment Strategy. Our assessment may be impacted by changes to this information or by market factors which cannot be foreseen at this stage. Urbis Pty Ltd will not accept liability or responsibility to any third party relying on information provided in this advice.

2 Demographic Trend Analysis

An important facet of this employment strategy review is to understand the latest demographic trends of the Redland Population as they relate to future employment opportunities within Redland City. The following section reviews demographic trends from the 2001, 2006 and 2011 Census of Population and Housing.

2.1 AGE PROFILE

To ascertain the likely future workforce of Redland City it is important to review the current and historic population by age profile. The following section outlines the age profile of Redland City and benchmarks it against the Brisbane average.

2.1.1 AGE PROFILE COMPARISON

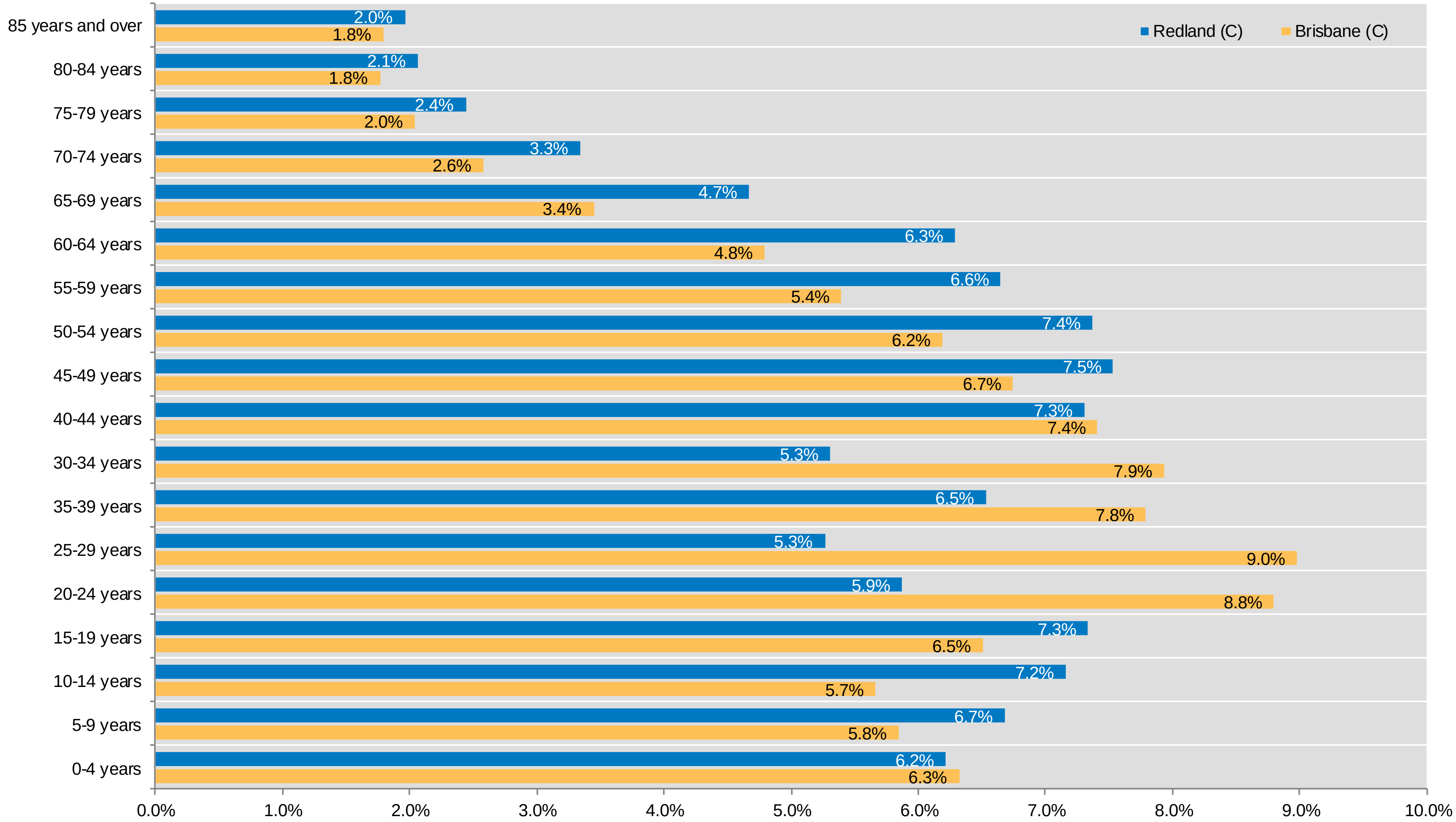
In comparison to the Brisbane City LGA, the Redland City LGA comprises a higher proportion of young children aged 5 to 19, older adults aged between 45 and 74 years of age, and elderly people aged greater than 75 years of age. Generally, these age categories represent a high proportion of middle aged families and retirees that reside within the region (refer Chart 2.1 overleaf).

Conversely, there is a significantly low proportion of people aged between 20 and 34 years of age in Redland City Council compared to the Brisbane City Council region. Generally, these people have reached independence, have recently finished high school and would be ready to move out of the family home. They would be undertaking tertiary education and/or seeking employment.

Age Profile Comparison, 2011

REDLAND CITY COUNCIL AND BRISBANE CITY COUNCIL

CHART 2.1



Source: Census of Population and Housing, 2011; Urbis

2.1.2 AGE PROFILE GROWTH

A pertinent aspect of the future Redland City economy is the age profile of residents, how this is currently trending and the implications that the age groups with strong growth would have on the employment strategies under consideration. **Chart 2.2** below and **Chart 2.3** overleaf illustrate the actual growth in age groups between the 5 year censuses between 2001 and 2011 for Redland City.

As expected, there is significant growth in the number of residents aged between 65 years and 85 years of age. This high proportion can be attributed to the growing number of retirees which supports the already well-known trend of retirees residing within the area. Focus should be put on potential employment industries that would be required to support these age groups, including health care and social assistance organisations such as retirement homes, aged care, medical centres, and other allied health care services.

Other age categories to experience growth between the 2001 and 2011 censuses were those aged between 45 and 64 years, as well as the teenage and young adult aged categories which generally include those people aged between 15 and 29 years of age. These family households are most likely in the middle stages of the family lifecycle, with the children in the household approaching the completion of secondary school and the start of independent living.

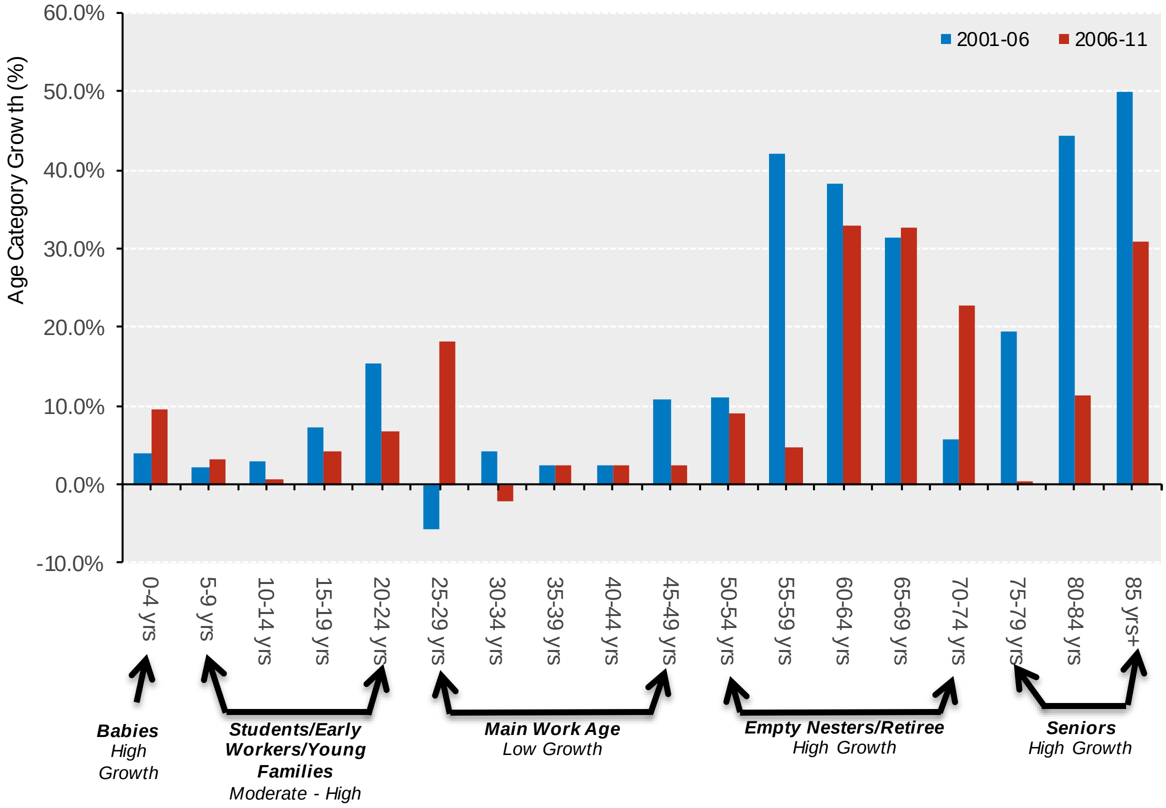
The retention of this younger generation is an important factor in developing the future employment strategy for Redland City Council. Currently, emigration is high for tertiary education students, early workers and young families, with a decrease in natural growth of those aged between 20 and 34. This is further highlighted by a decrease in real growth from 2006 to 2011 for those aged between 30 and 34.

Potential strategies to target the retention of these younger aged people shifting into the main working age category may include the development of an external university or TAFE campus in Redlands and the creation of service based employment opportunities.

Actual Growth by Age Group, 2001-06 and 2006-11

REDLAND CITY COUNCIL

CHART 2.2

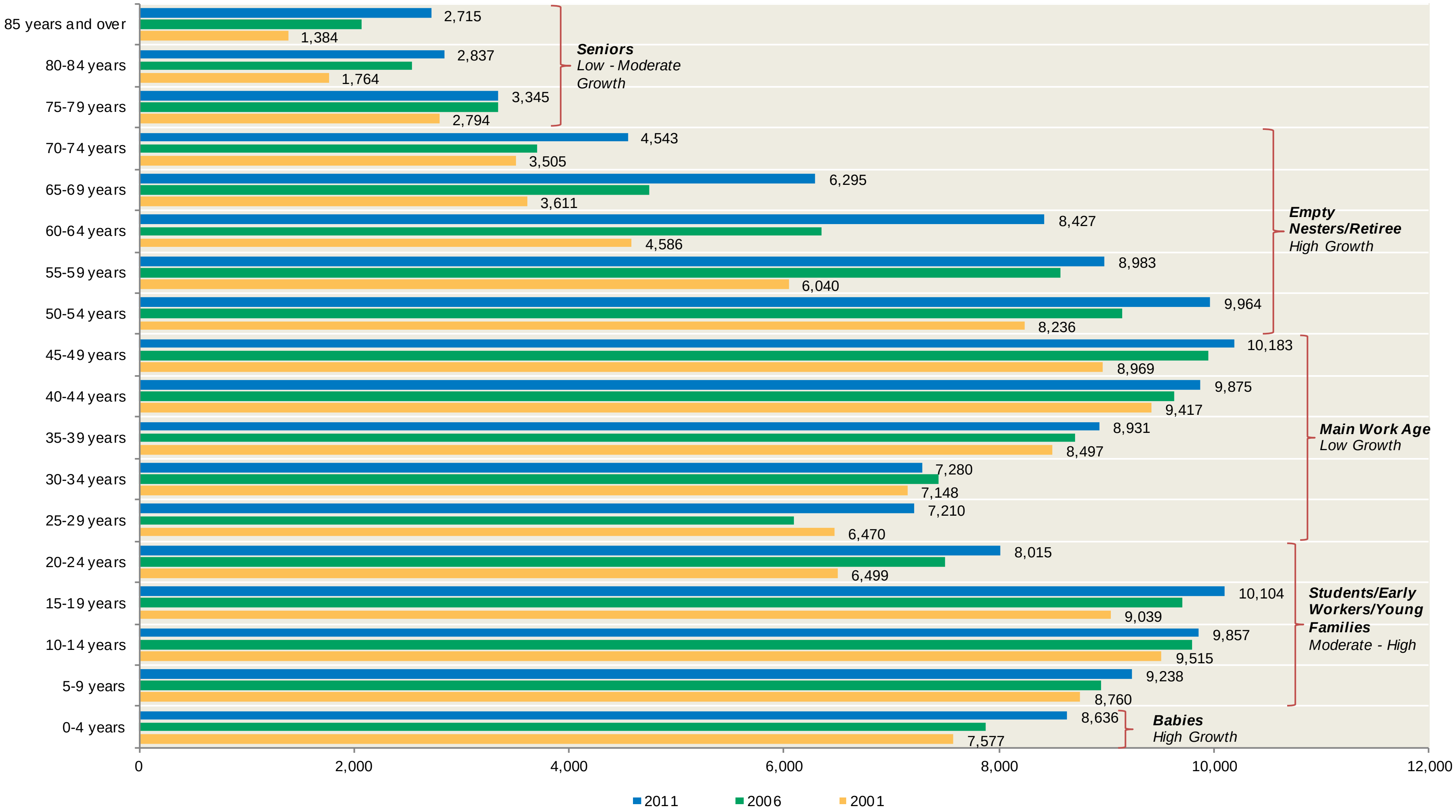


Source: 2001, 2006 and 2011 Australian Bureau of Statistics Census of Population and Housing; Urbis

Age Profile, 2001-2011

REDLAND CITY COUNCIL

CHART 2.3



Source: 2001, 2006 and 2011 Australian Bureau of Statistics Census of Population and Housing; Urbis

2.2 FORECAST GROWTH BY AGE GROUP SECTOR

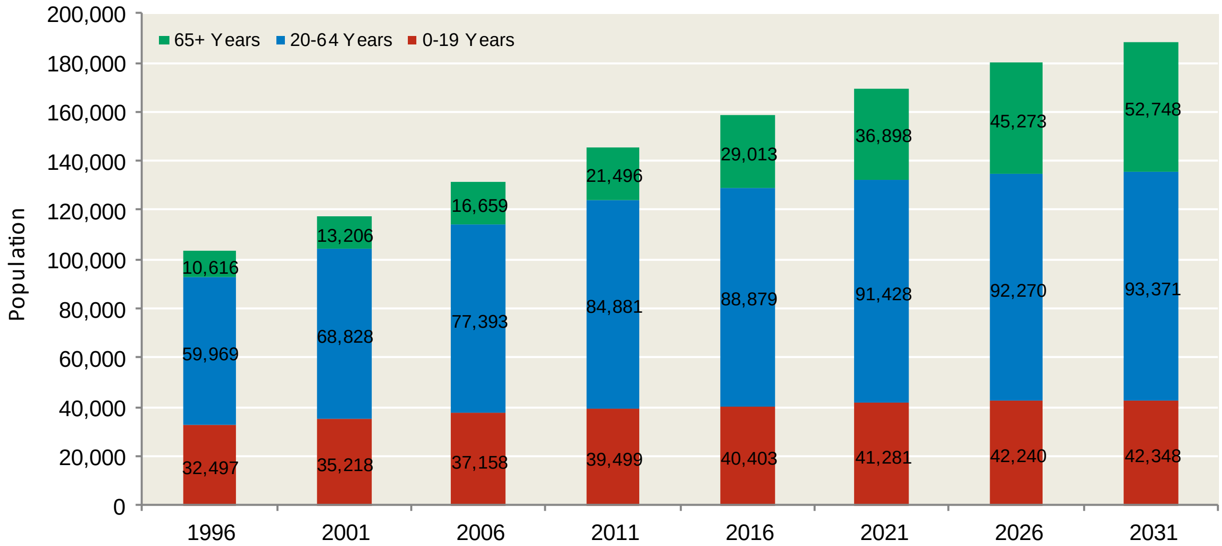
Redland City plans to continue to develop the local economy increasing the number of jobs available locally by 2031. The employment forecasts of the 2010 Centres and Employment Strategy provided opportunity for 60% of the City's workforce in 2031 to work locally. To reassess what this means in relation to job numbers and job creation, we have reviewed how the population is forecast to change and what this means for future employment generation.

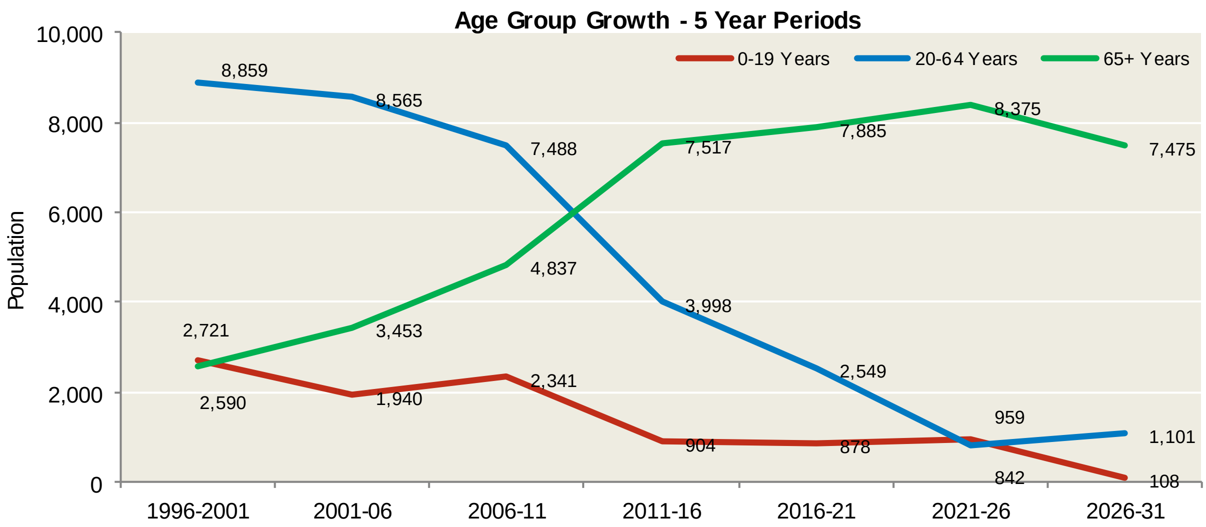
The dependency ratio of a population refers to its residents aged between 0-19 years and 65+ years per 100 people aged 20-64. Effectively, this shows the relative growth of non-working population versus the working population.

Chart 2.4 below illustrates the historic and forecast growth in the age groups of 0 to 19 years of age, 20 to 64 years of age and 65 years and above. Traditionally, the age group of 20 to 64 years of age represents the working population.

Historic and Forecast Growth by Age Group Category

REDLAND CITY COUNCIL, 1996 - 2031 CHART 2.4





Source: Queensland Government Population Projections to 2031: Local Government Areas, 2011 edition: Urbis

Historically, it is evident that there has been a significant increase in the number of people aged greater than 60 years of age living within the Redland City Council municipality. Over the 15 year period between 1996 and 2011, the number of people in this age group has increased by approximately 10,900 people, with around 45% of this increase occurring within the last 5 years. Despite the working age population (those aged between 20 and 64 years of age) experiencing a greater increase in the number of people within the same period (of approximately 24,900 people), it is clear that the population growth within this age group is declining (refer to the bottom chart of Chart 2.4). Over the last 15 years, population growth within the younger age group (0 to 19 year olds) within Redland City Council has remained relatively stable.

In terms of future population growth, it is clear that there is a distinct change in the dominant age group within Redland City Council. Between 2011 and 2031, the population aged 65 years and above are expected to increase by approximately 31,250 people, representing an increase of some 1,500 persons per annum. Conversely, the population aged between 20 and 64 years of age are only expected to increase by approximately 8,500 people, representing an average annual growth rate of some 425 persons. Younger people within Redland City Council are also expected to experience a decline in population growth with only an additional 2,850 people residing within Redland between 2011 and 2031. This represents a growth rate of less than 150 persons per annum.

By reviewing the above population, and the existing employment we can determine the level of required jobs to achieve a 60% self-sufficiency rate within Redland City.

Regardless of the ageing workforce and increased participation rates in older residents, for the purposes of this review we have assumed a similar participation rate profile to that reflected in the 2011 census. The 2011 participation rates by age group are shown in Table 2.1.

Labour Force Partcipation Rate by Age Group

REDLAND CITY, 2011-2031 TABLE 2.1

Age Group	Employed Labour Force[1]	Unemployed or Not in Labour Force
0-4 years	0%	100%
5-9 years	0%	100%
10-14 years	0%	100%
15-19 years	53%	47%
20-24 years	79%	21%
25-29 years	82%	18%
30-34 years	80%	20%
35-39 years	82%	18%
40-44 years	84%	16%
45-49 years	85%	15%
50-54 years	83%	17%
55-59 years	73%	27%
60-64 years	51%	49%
65-69 years	24%	76%
70-74 years	8%	92%
75-79 years	3%	97%
80-84 years	1%	99%
85+	1%	99%

1 Includes people employed (part time, full time, away from work) - Not stated and not included is excluded from the analysis
Source: ABS Census of Population and Housing; Urbis

By applying the participation rates to the forecast population by Age Group we can see that the expected employed labour force grows from 67,000 people to around 76,000 employees or 9,000 people. Given the current Redland City's employed labour force (people working within Redland City) equates to just over 35,000 people or 52% employment self-sufficiency, achieving a 60% self-sufficiency would require an additional 5,200 employees currently.

If we apply the same logic to the forecast employed residents we can see that by 2031 an additional 10,400 jobs are required to achieve a 60% self-sufficiency ratio.

Employment Self-Sufficiency Requirements

REDLAND CITY, 2011-2031 TABLE 2.1

	2011	2016	2021	2026	2031
Redland City Employed Residents	67,959	71,648	73,808	75,400	76,656
Current Jobs Provided within Redland City	35,575	35,575	35,575	35,575	35,575
Self-Sufficiency Rate	52.3%	49.7%	48.2%	47.2%	46.4%
Target Self-Sufficiency Rate	60.0%	60.0%	60.0%	60.0%	60.0%
Additional Jobs Required	5,200	7,414	8,710	9,665	10,419

Source: ABS Census of Population and Housing; Urbis

As shown in the table above, increasing employment by 10,400 jobs in the next 20 years is misleading. Whilst this would achieve the goal rate of 60%, a jobs increase of only 10,400 jobs or 520 per annum is well below what has been achieved in the previous 5 years (700 jobs per annum). In order to encourage growth within the region Redland City needs to monitor raw employment growth by industry in conjunction with understanding their level of self-sufficiency.

In summary the self-sufficiency rate should not be the sole indicator of improving the employment situation within Redland City for the following reason: If the population ages significantly as is suggested in the forecasts, labour force participation will in turn drop significantly and therefore the potential for the self-sufficiency rate to improve without improving jobs growth exists.

FACTOR/MEASURE	2010 STRATEGY	2012 REVIEW	CHANGE/RESPONSE/COMMENTS
Ageing Population and decreasing workforce	Improve self-sufficiency	Forecast workforce is ageing and resultant labour participation reducing.	Increase employment opportunities for the younger demographic. Encourage an inflow of younger working age Concentrate on level of jobs growth rather than self-sufficiency.

2.3 HOUSEHOLD INCOME

In order to develop an understanding of the level of wealth and the potential household expenditure within the Redland City LGA, statistics for the average annual household income have been analysed and benchmarked against the Brisbane City Council averages.

Chart 2.5 overleaf outlines the household income profile of Redland City Council as well as the income variation when compared to the Brisbane City LGA. The key points in relation to household income levels within Redland City Council are outlined below.

- Whilst a large proportion of households (approximately 20%) within the Redland City LGA comprise an average annual household income between $78,000 and $129,999, the majority of households earn between $15,600 and $51,999 per annum. This income band comprises approximately 26% of households within Redland City LGA and represents low to middle income earning households.

- In comparison to the Brisbane City LGA, Redland City Council comprises a significantly higher proportion of low to middle income earning households as well as a slightly higher proportion of households earning between $65,000 and $129,999 per annum. These income bands are generally related to households containing families with young children, which are strongly represented in the LGA.

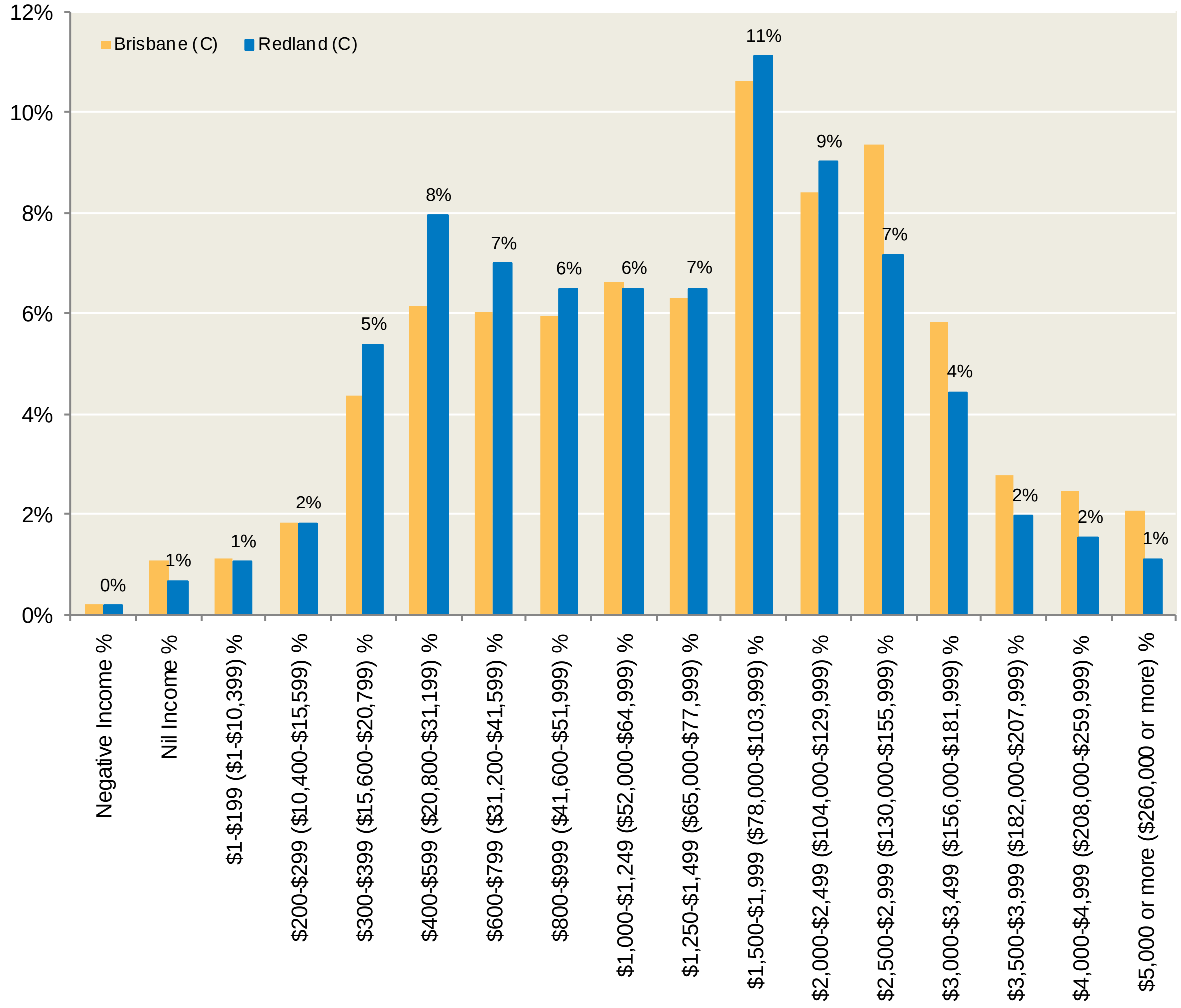
- Redland City Council has a significantly lower proportion of very high income earning households than Brisbane. These households earn greater than $130,000 per annum.

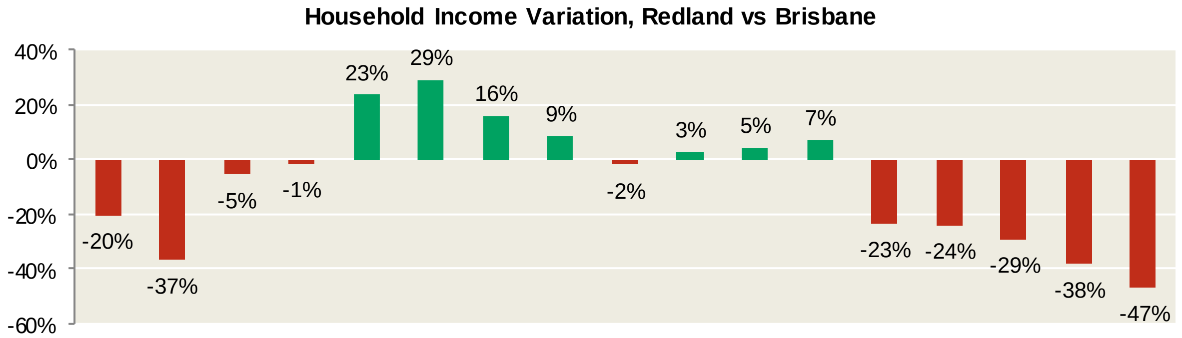
- Traditional spending patterns of low to middle household income are based around basic necessities, or non-discretionary spending, such as housing, food, fuel and power as well as household services and operation. As household income rises a greater share is spent on non-discretionary items such as alcoholic beverages, clothing and footwear and recreational goods and services.

Household Income Profile and Variation, 2011

REDLAND CITY VS BRISBANE AVERAGE

CHART 2.5





Source: Census of Population and Housing, 2011; Urbis

2.4 PERSONAL INCOME

A similar comparison to the average annual household income section has been completed for personal income levels within the Redland City LGA. Personal incomes determine the level of consumer consumption and generally increase during times of economic expansion and show a stagnant or declining trend during recessionary times.

The following **Chart 2.6** outlines the personal income profile for Redland City Council and its variation when compared to personal incomes within the Brisbane City Council region. The key points in relation to personal income levels within Redland City Council are outlined below.

- Just over one third of workers within the Redland City Council area earn annual incomes between $20,800 and $41,599.

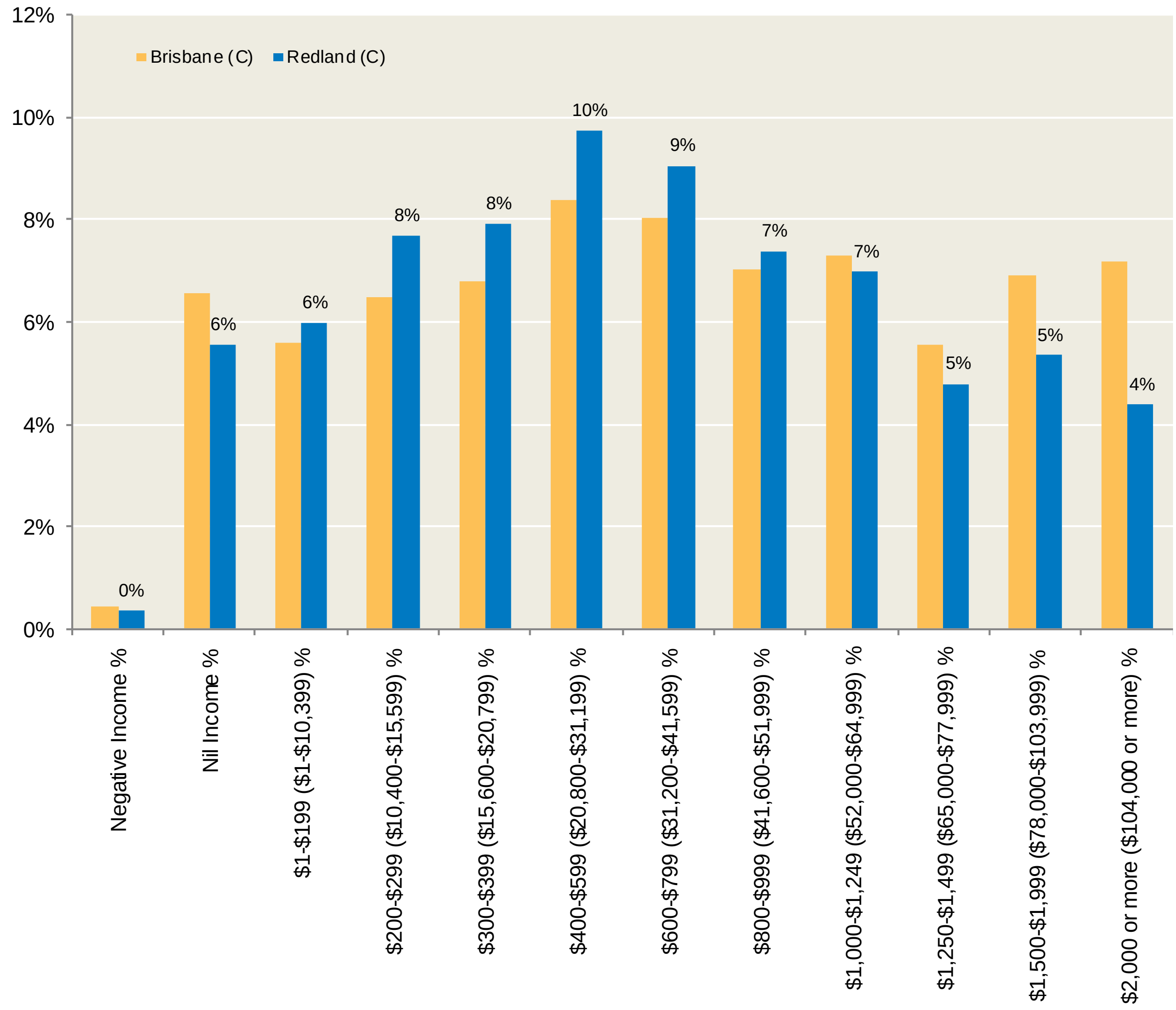
- When compared to Brisbane City, Redland City Council experiences a higher proportion of low and middle income earning individuals. Additionally, Redland is home to significantly less high end earners. This suggests a higher proportion of multiple income households when compared to Brisbane.

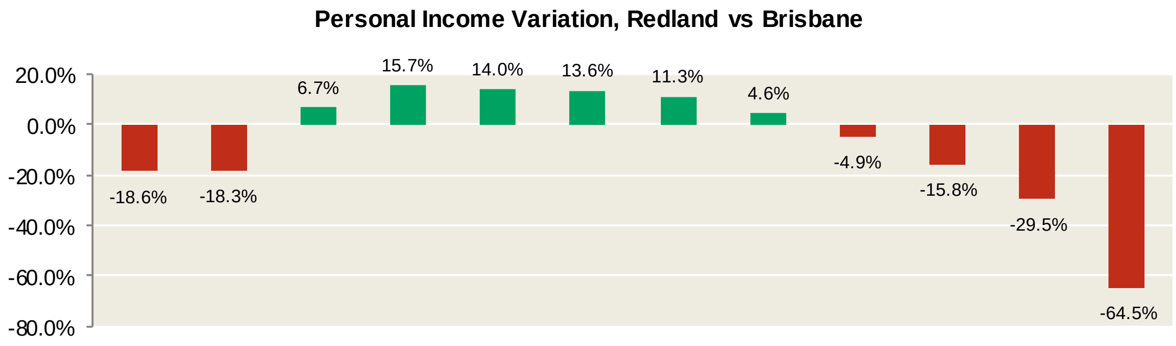
- The income variation supports the working-class family demographic with older school aged children working part-time making up the lower end of the scale with the parents towards the top end.

Personal Income Profile and Variation, 2011

REDLAND CITY VS BRISBANE AVERAGE

CHART 2.6





Source: Census of Population and Housing, 2011; Urbis

2.4.1 REDLAND SA2'S

The following section reviews the personal income variation between each of the Redland SA2's that comprise the Redland City Council LGA. **Chart 2.7** illustrates the differences in personal incomes between each SA2 as well as benchmarking each area with the overall Redland City Council and Brisbane City Council personal income average.

The key points in relation to the **Chart 2.7** are outlined below:

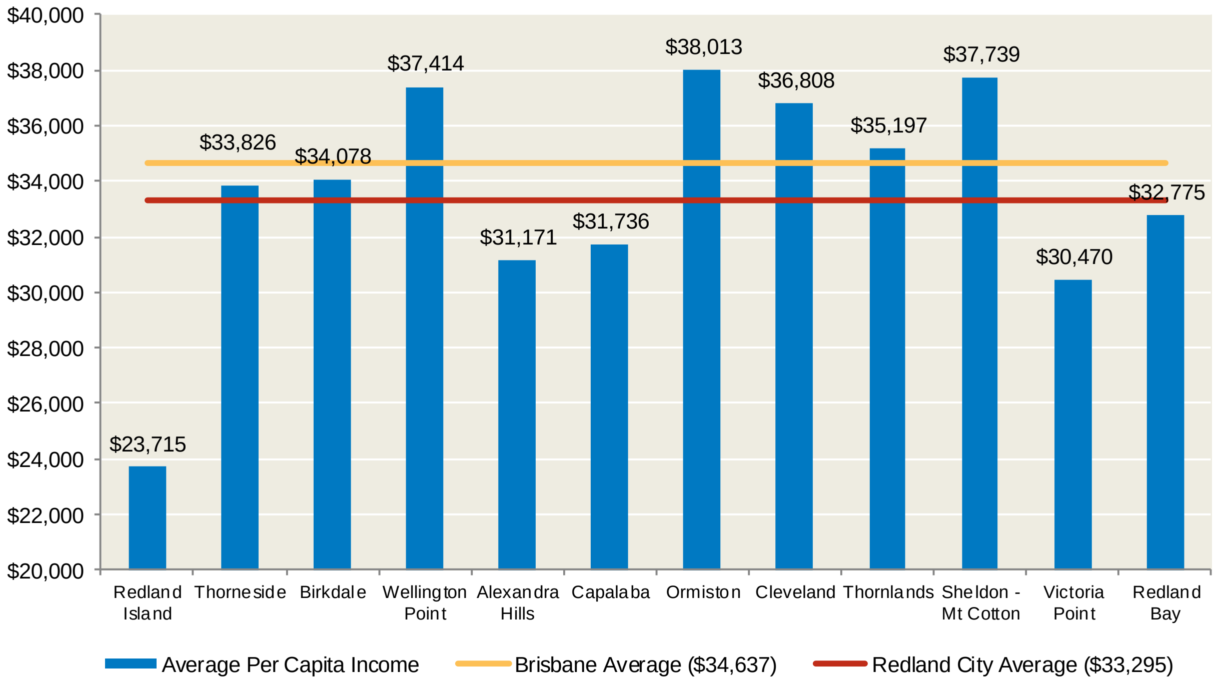
- Average income for each SA2 is relatively even, with the majority of personal incomes for each SA2 being between $30,000 and $38,000. The exception is Redland Islands (i.e. the Moreton Bay Islands being North Stradbroke, Coochiemudlo, Russell, Macleay, Lamb and Karragarra Islands), which are home to a higher proportion of retirees which lowers the average personal income level.

- The bay-side areas of Wellington Point, Ormiston and Cleveland represent some of the higher individual income areas. This higher income is typically required to sustain water-side residence.

- Overall, the Redland City Council area has a slightly lower average income when compared to the Brisbane average which is largely due to the lack of the top level of income earners within the LGA. It would be expected that the standard deviation of Redland's individual income would be smaller than that of Brisbane.

Personal Income

REDLAND CITY COUNCIL SA2's CHART 2.7



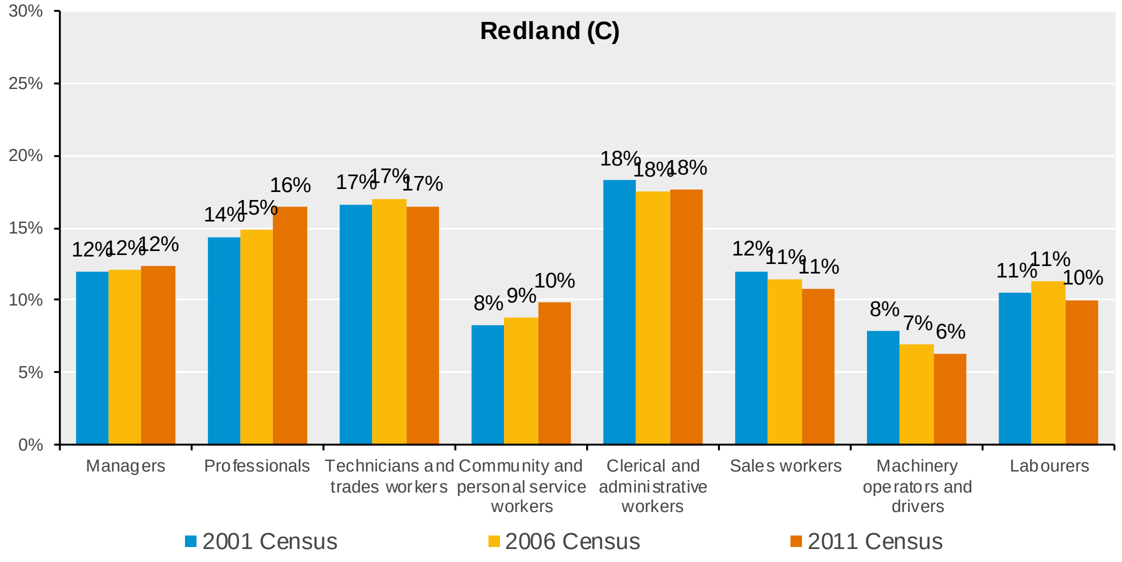
Source: ABS Census of Population and Housing, 2011; Urbis

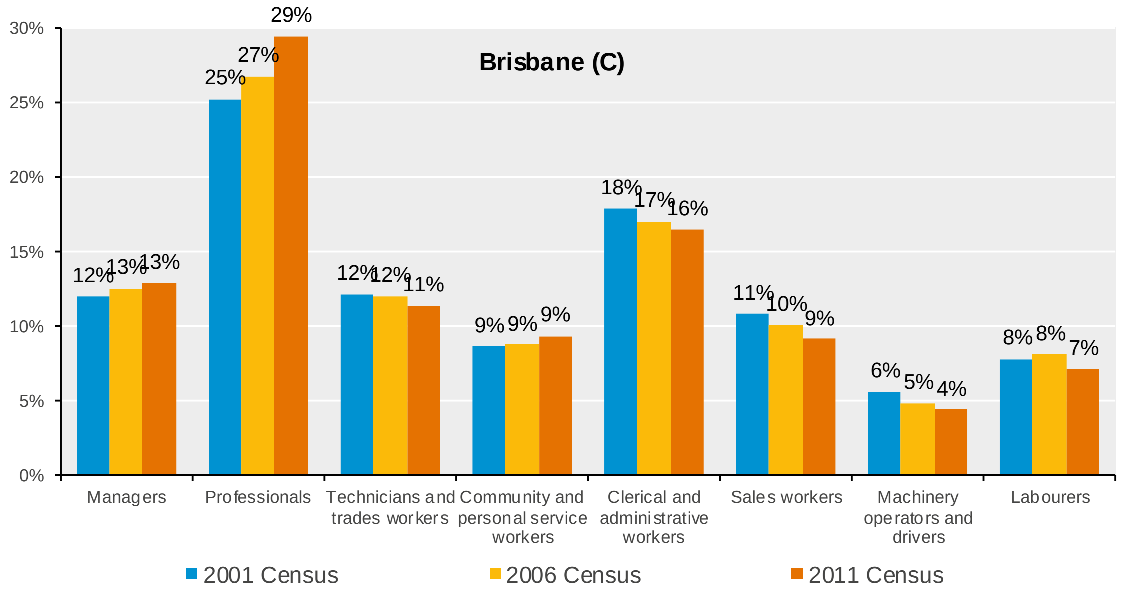
2.5 RESIDENT WORKFORCE BY INDUSTRY AND OCCUPATION

The following section provides an overview of the resident workforce industry types. This shows that Redland City, not surprisingly, has lower proportions of professionals and higher proportions of technicians and trade workers and a slightly higher proportion of labourers and machinery operators.

Employment Growth by Occupation

REDLAND CITY COUNCIL VS BRISBANE CITY COUNCIL



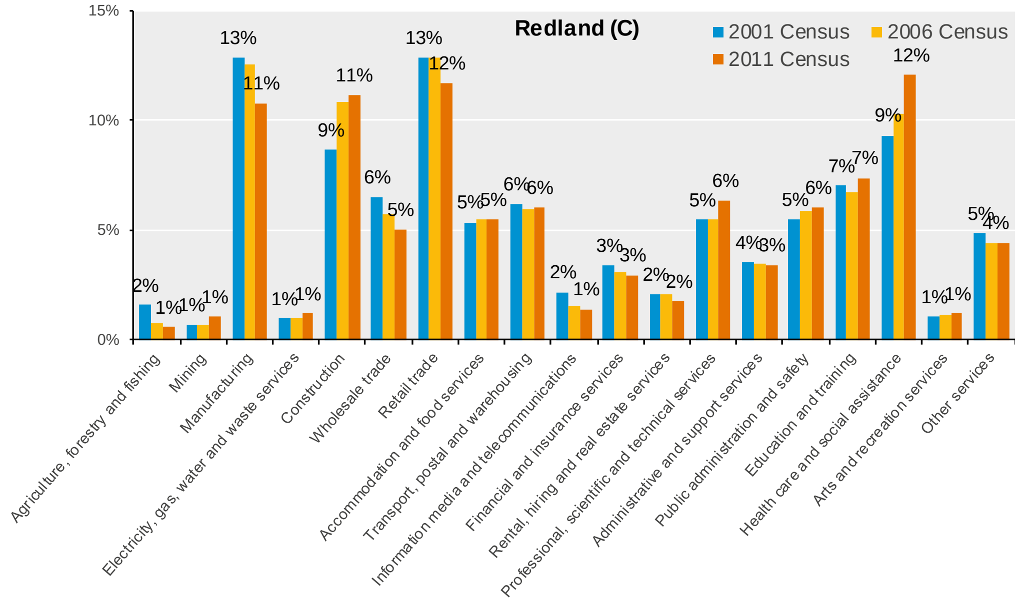


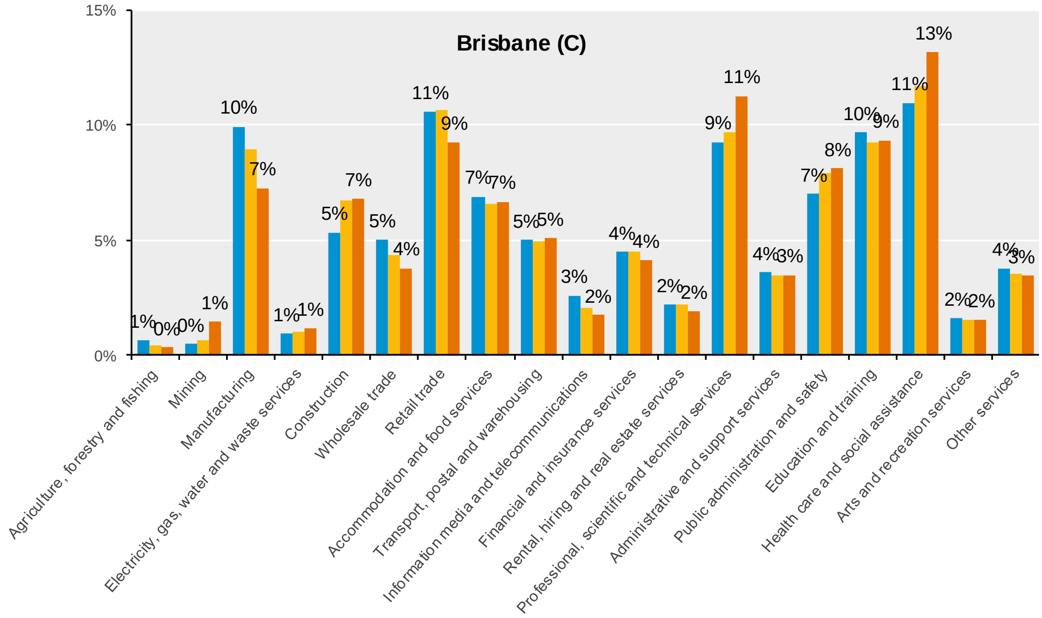
Source : ABS Census of Population and Housing; Urbis

If we look at the resident employment profile by industry, we can see that Redland City has a high proportion of employed residents working in health care and social assistance (12%) and retail trade (12%). Over the last 10 years, the proportion of Redland City's residents working in health care and social assistance has increased significantly by 3%. Compared to Brisbane, Redland City Residents have a high proportion of residents working within, construction, manufacturing and retail trade and lower proportions of residents working in professional, scientific and technical services, public administration and safety and education and training.

Employment Growth by Industry

REDLAND CITY COUNCIL VS BRISBANE CITY COUNCIL





Source : ABS Census of Population and Housing; Urbis

2.6 IMPLICATIONS FOR THE STRATEGY

The following points provide a summary of the key socio-economic characteristics of Redland City Council and outline the implications that these will have on the employment strategy:

- Over the next 20 years to 2031 it is expected that there will be a higher proportion of older adults aged greater than 65 years of age within Redland City Council. Of the 42,500 additional residents forecast for Redland City in the next 20 years, the prime working age group (20-64 years of age) are forecast to grow by only 8,500 residents.

- There are currently a high proportion of low to middle income earners with 65% of household incomes between $15,600 and $130,000 per annum. The spending patterns of these households are highly based around non-discretionary household items.

- Compared to Brisbane, the Redland City employment profile comprises a significantly low proportion of professionals, a significantly higher proportion of technicians and trade workers and a slightly higher proportion of labourers and machinery operators.

- In accordance with the changing age profile of Redland City, a high proportion of residents work within the Health Care and Social Assistance industry (12%). Other industries that a high proportion of residents work within are Retail Trade (12%), Construction (11%) and Manufacturing (11%) industries.

3 Industrial Lands Review

Following the 2009 removal of the former Thornlands Integrated Employment Investigation Area from the Urban footprint of the SEQ Regional Plan, this section reviews that decision in light of recent growth trends and future industrial land requirements. It should be noted that this section also considers growth opportunities within Redland City as a result of the 2012 Redlands Rural Futures Strategy prepared by AECOM in association with Think Food and Energetic Communities.

Initially we have undertaken a review of the historic growth in industrial sectors to determine the recent trends. Following this we have undertaken analysis in regards to providing export (i.e. products exporting outside Redland City) oriented industries and the associated land and locational requirements.

3.1 INDUSTRIAL EMPLOYMENT GROWTH

A significant outcome of this review is to assess the future industrial land requirements for Redland City to inform the review of the RPS. This section reviews the recent historic growth for industrial uses by 1 digit ANZSIC code and compares that growth against the forecast growth outlined within the 2010 strategy.

The key findings of the analysis can be summarised as follows:

- The 2010 strategy outlined forecast employment growth within industrial sectors of 3,308 jobs. These forecasts were prepared using the 1993 ANZSIC codes and in order to readjust to the 2006 ANZSIC codes we have assumed that the 1 digit 2006 ANZSIC categories of Construction Division, Electricity, Gas, Water and Waste Services Division, Manufacturing Division, Mining Division, Transport, Postal and Warehousing Division and Wholesale Trade Division make up a large proportion of the industrial sector.

- The historic growth within these sectors over the last five years has averaged 94 employees per annum (as shown in the table below). Therefore, the forecast population growth of 120 people per annum going forward is in line with recent historic trends.

Industrial Uses - 1 Digit ANZSIC

REDLAND CITY

TABLE 3.1

Industry	Employment Growth				Percent of Forecasts
	Historic 2006-2011		Forecast 2006-2031		
	No.	Per Annum	No.	Per Annum	
Construction Division	344	69	1,906	76	18%
Electricity, Gas, Water & Waste Services Division	65	13	37	1	176%
Manufacturing Division	97	19	288	12	34%
Mining Division	36	7	8	0	450%
Transport, Postal & Warehousing Division	111	22	776	31	14%
Wholesale Trade Division	-183	-37	-25	-1	732%
Grand Total	**470**	**94**	**2,990**	**120**	**16%**

Source: Census of Population and housing 2006 and 2011; Urbis

The above comparison in industrial employment growth indicates that the recent period (2006-11) has seen lower growth rates than the long term forecast. There are notable differences across sectors with Construction; Electricity, Gas, Water & Waste Services; Manufacturing; and Mining, growing above forecast, and Transport, Postal & Warehousing; and Wholesale Trade growing (or declining) below forecast. On balance this indicates that industrial land demand is likely to have been below the forecast requirement over the period 2006-11.

We can therefore conclude from the above analysis that the historic growth rates have been below the forecast growth rates of the 2010 strategy. Assuming the assumptions regarding land take-up for industrial land within the 2010 strategy remain the same we can conclude that the following excerpt from the strategy also remains the same.

"It is considered that the City's existing network of industrial lands and the integrated employment area at Redland Bay provides sufficient opportunity to accommodate forecast demand for industrial land to 2031. In the longer term, given the limited opportunity for future industrial land releases, the opportunity to increase industrial land utilisation (i.e. height and site coverage etc.) through the Planning Scheme along with focusing investment strategies on population serving industrial activity that requires being located within the City should be considered."

3.2 NEED FOR A MAJOR EMPLOYMENT AREA

Following the removal of the Thornlands Employment Investigation Area in 2009, the competitiveness of providing a new major employment area within Redland City has come into question recognising the regional employment areas located in close proximity to the City. The following section reviews the Investigation Area against typical success drivers of similar export (outside Redlands) oriented lands. Initially we have assessed the key competitors to Redland City.

3.2.1 COMPETITIOR ANALYSIS

The following section provides an overview of the existing and planned regional enterprise areas located in close proximity to Redland City. It outlines the significant existing and future infrastructure investment/commitments made to these areas as well as an estimation of the current level of supply and the product that each precinct offers to the market.

AUSTRALIA TRADECOAST

The Australia TradeCoast Region encompasses approximately 8,000 hectares of industrial land and is located only six kilometres north east of the Brisbane CBD. Strategically located at the mouth of the Brisbane River, the industrial precinct has direct access to air, sea, road and rail networks, including the Port of Brisbane and Brisbane Airport. With exceptional access to a wide infrastructure networks, strategic government partnerships, export facilities and expected growth on offer, the TradeCoast is one of the fasted growing trade and industry regions in Australia.

Major companies that are located within the Australia TradeCoast include Australia Post Logistics, Cement Australia, Shell, BP, Nestle Australia and Toll Logistics.

Available Lots			***Net Rents ($/m² pa)***		***Capital Values***		
No. of Lots	Area (ha)	Ave. Size	Prime	Secondary	Prime	Secondary	Ave. Land Values [1]
15	30.9	2.4	$110-$120	$80-$110	$1,200-1,600	$950-$1,150	$275-$375

1. *Value for land parcels greater than 10,000 sq.m*

YATALA ENTERPRISE AREA

Situated within Yatala, Ormeau and Stapylton, the Yatala Enterprise Area (YEA) contains approximately 3,000 hectares of industrial land and is strategically located between Brisbane and the Gold Coast. Given its proximity to the M1 Motorway, the YEA has access to a range of international and domestic networks including the Port of Brisbane, the Brisbane and Gold Coast International Airports as well as interstate markets south of the Gold Coast.

Major tenants located within this enterprise area include Carlton United Breweries, Aldi, Stratco, Australia Post and VISY.

Available Lots			***Net Rents ($/m² pa)***		***Capital Values***		
No. of Lots	Area (ha)	Ave. Size	Prime	Secondary	Prime	Secondary	Ave. Land Values [1]

28	▪ 26.6	▪ 0.9	$105-115	$70-$100	$1,250-$1,450	$900-$1,100	▪ $175-$250
Value for land parcels greater than 10,000 sq.m							

It should be noted that the number of lots available are the current supply of approved serviced vacant land. It does not include vacant unserviced englobo sites.

In addition to these major industrial master planned precincts, it is also important to identify key future employment investigation areas in proximity to Redland City. In response to the Queensland Government recognising the marine industry as one of its key industry growth sectors, the South East Queensland Regional Plan has identified the Steiglitz area as a key economic activity centre for investigation, particularly as a potential location for the expansion of the marine and industry precinct similar to the current Gold Coast Marine Precinct. The development of a marine and industry precinct at Steiglitz would result in significant employment opportunities for the surrounding regions.

3.2.2 COMPETITOR COMPARISON

The following table compares the key enterprise precinct success factors.

Industrial Site Success Factors

REDLAND CITY COUNCIL EMPLYOMENT REVIEW

Success Factors	Thornlands IEA	Australia Trade Coast	Yatala Enterprise Area
Access to Regional Freight Routes	×	✓✓✓	✓✓✓
Access to Labour	✓	✓✓✓	✓✓
Flat land and minimal constraints	✓	✓✓✓	✓✓✓
Price points (site sale/rents)	×	✓	✓
Consolidated Land Ownership	✓	✓✓	✓✓✓
Significant Land Scale	✓	✓✓	✓✓✓

Source : Urbis

As can be seen the Thornlands IEA has limited advantages in regards to providing for an export oriented enterprise precinct. Whilst it is unknown what the exact price points could be we would envisage that due to fragmented land constraints and potential major required infrastructure upgrades price points within Thornlands IEA would not be competitive.

3.3 SWOT

In light of the above analysis we have undertaken a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis to determine the potential competitive advantages an enterprise area within Redland would offer.

STRENGTHS	THREATS	OPPORTUNITIES
▪ Visual Amenity	▪ The recognition and protection of visual amenity and landscape character values	▪ Leverage niche operators that require amenity
▪ Access to Moreton Bay and Moreton Bay Islands	▪ The Northern Gold Coast region also has access to Moreton Bay and the Pacific Ocean. The Gold Coast is also a lot more investment friendly ▪ Moreton Bay Regional Area	▪ Establish marine related activities and ancillary use, of both a recreational and commercial nature ▪ Investigate ability to provide niche opportunities for marine related activities
▪ Established commercial area (Capalaba) situated on major roads linking to the Pacific Motorway	▪ Lack of industrial zoned land	▪ Opportunity for industrial development ▪ Potential for Capalaba to develop into an industrial node
▪ Proximity to Brisbane	▪ Lack of public transport and good quality roads that link the two cities	▪ Transport to Brisbane airport and port facilities
▪ Commuter suburb that services Brisbane	▪ Lack of public transport networks	▪ Potential to leverage from this strength and provide good service based industrial land

WEAKNESSES	THREATS	OPPORTUNITIES
▪ Limited Population Growth	▪ Redland City population growth is expected to stabilise over the next 10 to 15 years. This may result in businesses choosing to locate in areas with higher levels of population growth	▪ Encourage ease of access to Redland City for both internal and external workforce
▪ Distance from customers in comparison to competition and other land release areas	▪ More attractive and competitive offers from Yatala, TradeCoast and Brisbane Airport ▪ Development of high quality corporate and industrial parks with associated services in a built environment	▪ Improve competitive positioning ▪ Identify competitive advantages and opportunities to sell
▪ Access to major infrastructure networks	▪ Competitive industrial precincts have excellent access to a broad range of markets and infrastructure networks	
▪ Lack of appropriate consolidated industrial land	▪ Potential instability	▪ Investigate opportunities to develop a major enterprise precinct to that satisfies typical success factors
▪ Redlands is a commuter area	▪ The rest of South East Queensland	
▪ Maintaining a viable rural economy, which constrains the ability to develop industrial land	▪ Prevents potential availability of land for other uses	▪ Continued use and expansion of existing agricultural activities, such as poultry, agricultural, fruit and vegetables, and nursery and horticultural activities ▪ Need to leverage the rural lands including good quality agricultural land and translate this into investment opportunities
▪ With conservation areas to the west and Moreton Bay to the east Redland is somewhat perceived as an island		
▪ Perception that Redlands City isn't open for business	▪ Gold Coast has the same attributes to Redlands and is "open" for business	

WEAKNESSES	THREATS	OPPORTUNITIES
▪ Distance from major infrastructure such as roads and ports. Poor quality roads linking Redlands to these major roads		▪ Benefit from a significant industrial precinct
▪ Lack of Infrastructure	▪ No major infrastructure to be developed in Redland in short term	▪ Determine likely timing of the Eastern busway extension and determine interim solutions for commuting
▪ Ageing Population	▪ Declining local working age population	▪ Identify key growth industries by future employment profile and determine investment focus
▪ Lack of local skilled workforce		▪ Identify skills required – develop and implement a local training program

3.4 POTENTIAL SITE ANALYSIS

Having considered the strengths and weaknesses of Redland City when considering establishing a major employment lands precinct, we can determine the required success factors relevant to establishing such a precinct. Redland can only provide regionally competitive employment land for export oriented industries if the precinct satisfies these requirements:

- In close proximity to the Brisbane Ports
- Relatively flat land with minimal constraints (vegetation, bushfire hazard etc.)
- Offers a comparatively cheaper price point than Yatala (Prime Capital = $1,250-$1,450) and the Australia Trade Coast (Prime Capital = $1,200-$1,600 per sq.m)
- Established infrastructure links – Old Cleveland/Moreton Bay Road > Gateway Motorway
- Significant scale (i.e. >50 ha)
- Leverage from Brisbane market
- Consolidated Land Ownership

Given this list of factors, we have identified one site incorporating 2 lots that potentially may meet the above criteria (despite having significant vegetation) and should be investigated further for industrial purposes. It should be noted that this site contains areas of recognised high environmental value (including koala bushland habitat) that are to be retained and protected reducing the overall amount of land available for development as an industrial precinct.

Development of this land has the potential to attract small to medium scale industry operators that would benefit from access to the established Capalaba industrial precincts, convenience of major arterial routes linking to the Pacific Motorway and access to the Brisbane Port and Airport. This would further establish Capalaba as an industrial node.

It should be noted that the Thornlands Integrated Employment Investigation Area does not meet a number of these success factors including consolidated land ownership, access and close proximity to Brisbane Ports and established infrastructure links.

	380-416 OLD CLEVELAND RD, BIRKDALE	340-378 OLD CLEVELAND RD, BIRKDALE
Ownership	Airservices Australia	Australian Communication Authority
Size	39.06 ha	61.78 ha
Current Zoning	Community Purpose and Conservation	Community Purpose and Conservation
Current Land Use	Vacant Land	Vacant Land
Infrastructure	Linkages to Brisbane Ports and Workforce	Linkages to Brisbane Ports and Workforce

The identified development site meets the identified success factors and may have the ability to attract an in-flow of workers to Redland City. The key strengths of the site include proximity to established freight routes, proximity to an existing and established population and therefore labour force, consolidated ownership and limited constraints (noted that there are some vegetation constraints). The development of an enterprise precinct would provide Redland City with a gateway for export oriented activity.

3.5 PLANNING CONSTRAINTS ON DEVELOPMENT OF INDUSTRIAL LAND IN REDLANDS

LOCAL GOVERNMENT COMMERCIAL INDUSTRY ZONE DEVELOPMENT CONTROL COMPARISON

To understand the competitiveness of the existing Redland planning scheme a comparison of key development controls has been undertaken. The comparison outlined by the below table takes key elements such as building height, site cover and level of assessment for example and compares how the industrial zones of Redland relate to its neighbouring cities.

KEY CONTROLS	REDLAND CITY COUNCIL	BRISBANE CITY COUNCIL	GOLD COAST CITY COUNCIL	LOGAN CITY COUNCIL
▪ **Planning Scheme Zone**	Commercial Industry	▪ Light Industry	▪ Industry 2 (Low Impact)	▪ Centres Locality (Predominant Commercial Industrial Land Uses are located in S1, S7 and S11 sub-area of *Springwood Zone*, L2 sub-area of *Loganholme Zone,* M2 and M5 sub-area of *Meadowbrook Zone*, BP2 and BP4 of the *Browns Plains Zone*
Min Lot Size	1,000m^2	▪ 1,000m^2	▪ 1,000m^2 ▪ Greater than 2,000m^2 if rear lot	▪ 1,500m^2
▪ **Site Cover**	***Building Site Coverage*** ▪ 50% of site area at ground floor level ▪ 65% of site area above ground floor level ***Total Development Area*** ▪ 90% including access, parking, service and outdoor work areas	▪ Site Cover does not exceed 75% in Light Industry Areas	▪ Building site coverage is not greater than 70% of the site area unless Specific Development Code provides for a lesser site coverage	▪ Where not specified in the prescribed solution for the zone and sub-area in the applicable locality and zone code or the applicable use code, the maximum site coverage is a maximum of 80% of the site area.
▪ **Height**	▪ 10m or 8.5m at any part of the building which is adjoining an Urban Residential or Medium Density Residential Zone ▪ 15m in sub-area CM1	▪ 15m or 8.5m where the site is visible from a sensitive receiving environment	▪ Not more than 11.5m in height and has a maximum of three storeys	▪ Where within 15m of premises in the residential locality, non-urban locality or the investigation locality; or A maximum of 12m
▪ **Setbacks**	***Front (Primary road frontage)*** ▪ Greater than 10 - 15m ▪ Front setback in sub-area CM1 are between 3 and 5m ***Side and Rear*** ▪ Between 0 and 5m for buildings, structures or designated outdoor	▪ No part of any building or structure is closer than 6m to any road frontage	▪ Not less than 10m from primary frontage of the site ▪ 7m from secondary frontage(s) ▪ Building is aligned with one or more of the buildings adjoin the site	***Frontage (Minimum Road Boundary Clearance)*** ▪ Where not specified in the prescribed solution for the zone and sub-area in the applicable locality and zone code or the applicable use code: ○ 3m for a building less than 15m in

KEY CONTROLS	REDLAND CITY COUNCIL	BRISBANE CITY COUNCIL	GOLD COAST CITY COUNCIL	LOGAN CITY COUNCIL
	work areas; or ▪ Greater than 10m where adjoining the Urban Residential or Medium Density Residential Zones			height o 6m for a building greater than 15m in height ***Side and Rear*** ▪ 10m from boundary of adjoining recreation or conservation area ▪ 4m where the adjoining development is a single storey building not exceeding 4m in height and walls have fixed windows and self-closing doors or 10m where previous does not apply ▪ Where the above does not apply – 6m where height is between 15m – 30m ▪ Where above 30m – 6m plus 0.5m for each 2m in height excess of 30m
▪ Uses	***Permissible Uses (Self-Assessable and Code)*** ▪ Brothel ▪ Bulky Goods Showroom ▪ Caretakers Dwelling ▪ Car Wash Facility ▪ Display and Sales Activities ▪ Emergency Service ▪ Estate Sales Office ▪ Funeral Parlour ▪ Garden Centre ▪ General Industry (Less than 2500m^2) ▪ Indoor Recreation Facility ▪ Landscape ***Impact*** ▪ All other material change of use	***Permissible Uses (Self-Assessable and Code)*** ▪ Commercial Character Building where in Commercial Character Building and complying with code ▪ Emergency Services ▪ Industry where not involving building work, complying with self assessable Acceptable Solutions, ***Impact - Generally Appropriate*** ▪ Car wash ▪ Car Park ▪ Community Facilities ▪ Display and Sales Activities ▪ Indoor Sport and Recreation ▪ Industry where above controls in Self and Code requirements ▪ Park where not complying with Park	***Permissible Uses (Self-Assessable and Code)*** ▪ Brothel ▪ Bulk Garden Supplies ▪ Caretaker's Residence ▪ Car Park ▪ Funeral Parlour ▪ Industry ▪ Kennel ▪ Milk Depot ▪ Motor Vehicle Repairs ▪ Open Sports Ground ▪ Park ▪ Private Recreation ▪ Service Industry (Group A and B) ▪ Service Station ▪ Storage ▪ Take-Away Food ***Impact*** ▪ Convenience Shop ▪ Fuel Depot ▪ Indoor Recreation ▪ Place of Worship ▪ Refuse Disposal ▪ Refuse Transfer Station ▪ Service Industry (Group B – where including commercial and industrial equipment hire) ▪ Transit Centre ▪ Vehicle Hire	***Permissible Uses (Self-Assessable and Code)*** ▪ Accommodation Building (In L2 where development is a motel) ▪ Car Depot (In L2, BP2 and BP4) ▪ Car Park (In L2) ▪ Car Wash (In S1, S7, S11, L2, M2, M5, BP2 and BP4) ▪ Caretaker's Dwelling ▪ Child Care Centre (In L2) ▪ Commercial Premises (In S1, S7, S11, L2, M5 and BP2) ▪ Commercial Services (in S1, S7, S11, L2 and ***Impact*** ▪ Any other material change of use

KEY CONTROLS	REDLAND CITY COUNCIL		BRISBANE CITY COUNCIL		GOLD COAST CITY COUNCIL		LOGAN CITY COUNCIL	
	Supply Depot ▪ Minor Utility ▪ Park ▪ Produce Store ▪ Retail Warehouse ▪ Road ▪ Service Industry ▪ Service Station ▪ Shop ▪ Telecommunications Facility ▪ Temporary Use ▪ Utility Installation ▪ Vehicle Depot ▪ Vehicle Parking Station ▪ Vehicle Repair Premises ▪ Veterinary Surgery ▪ Warehouse		not identified in Schedule 1 or 2 ▪ Industry involving building work, new building is less than 8.5m, less than $2500m^2$ and not identified in Schedule 1 or 2 ▪ Industry not involving building work, not complying with code and not identified in Schedule 1 or 2 ▪ Landing ▪ Outdoor lighting ▪ Park ▪ Telecommunications Tower ▪ Utility Installation ▪ Warehouse where not involving	Code ▪ Shop or Office where $250m^2$ GFA and complying with the applicable Acceptable Solutions of the Centre Design Code ▪ Stable where located in Stables Location as identified on the scheme maps ▪ Warehouse where above requirements of Self and Code Assessable requirements ***Impact - Generally Inappropriat***	Premises ▪ Telecommunication Facility ▪ Temporary Use ▪ Transport Terminal ▪ Veterinary Clinic ▪ Veterinary Hospital ▪ Warehouse ▪	Premises	BP2) where GLA does not exceed $200m^2$ ▪ Community Care Centre (In BP2 and BP4) ▪ Detached Bottle Shop (In S1, S7, S11, L2 and BP2) ▪ Development display and sales ▪ Educational Establishment ▪ Food Outlet ▪ Fuel Depot (S7, S11 and M2) ▪ Funeral Establishment ▪ General Industry (S7, L2 and M2) ▪ Health Care Precinct (L2 and BP2) ▪ Indoor Entertainment (L2, M2, M5, BP2 and BP4) ▪ Light Industry ▪ Local Utilities ▪ Market (other than BP4) ▪ Open Air Display (S1, S7, S11 and L2) ▪ Outdoor Entertainment ▪ Place of Worship ▪ Public facility ▪ Public Purpose	

KEY CONTROLS	REDLAND CITY COUNCIL		BRISBANE CITY COUNCIL		GOLD COAST CITY COUNCIL		LOGAN CITY COUNCIL	
			building work, complying with code and not involving storage of dangerous goods above volumes identified in Schedule 2 ▪ Warehouse where not involving building work, not complying with code and not involving storage of dangerous goods above volumes identified in Schedule 2 ▪ Warehouse where involving building work, new building is less than 8.5m, new building is less than	***<u>e</u>*** ▪ Industry where identified in Schedule 1 and 2 ▪ Any other Material Change of Use			▪ Restaurant ▪ Service Station ▪ Services and Trade ▪ Shop ▪ Telco Facility ▪ Vehicle Repair Station ▪ Veterinary Clinic ▪ Warehouse	

KEY CONTROLS	REDLAND CITY COUNCIL		BRISBANE CITY COUNCIL		GOLD COAST CITY COUNCIL		LOGAN CITY COUNCIL	
			2,500m^2 GFA and not involving the storage of dangerous goods above volumes identified in Schedule 2					

From a review of this table the following conclusions are made:

- **Minimum lot size** – in relation to this element Redland is comparable to neighbouring cities. In fact industrial lots are typically not smaller than this size given the difficulty in making them function if they are smaller.
- **Site cover** – the site cover specified is very conservative compared to surrounding cities. Increasing site cover should be examined as part of the new planning scheme. 75% site cover is considered best practice.
- **Height** – Building height is generally more conservative than surrounding areas. Again this could be revised as part of the new planning scheme to be increased to 15m.
- **Setbacks** – These seem overly generous given the character and nature of these areas and should be reviewed with a view to reducing setback requirements where appropriate.
- **Uses** – Possible uses seem comparable to surrounding cities. Council may want to investigate the option of making changes of use to existing industrial buildings self assessable as a further incentive which makes doing business in the Redlands easier.

3.6 RURAL FUTURES BASED ENTERPRISE PRECINCT

As outlined in the 2012 Draft Rural Futures Strategy, the opportunity exists to establish various key projects that are aligned with encouraging the rural area of Redland City as a place to work and learn, play and stay, and live and sustain (Draft Redlands Rural Futures Strategy). The strategy sets out 18 separate strategic actions that will encourage reinforcement of these themes and in turn contribute to the economic sustainability of Redland City.

A number of the actions outlined within the Rural Strategy are proposed to be located within the former Thornlands Integrated Employment Investigation Area. Following a workshop undertaken on Thursday the 6th of December 2012 (attended by staff of AECOM, Urbis and Redland City Council) it was agreed that a recommendation should be made within this review that lands should be made available for the development of rural based enterprise activities as outlined within the Draft Redlands Rural Futures Strategy and that due to locational benefits (i.e. central to Redland City and rural lands) the former Thornlands Integrated Employment Investigation Area would be a suitable location. Whilst it is beyond the scope of this review to quantify the appropriate land requirement for such a rural enterprise area it should be focused on larger allotments to minimise issues associated with fragmented and multiple ownership and ideally be championed by a landowner that has the capacity to deliver the enterprise area.

3.7 REVIEWING THE STRATEGY

FACTOR/MEASURE	2010 STRATEGY	2012 REVIEW	ACTION/CHANGE/RESPONSE
Future of the Former Thornlands Enterprise Precinct	▪ n.a.	▪ Establish a portion of the former Thornlands Enterprise Precinct as a Rural Enterprise Precinct, hosting land uses such as those outlined within the Draft Redlands Rural Futures Strategy.	▪ Determine the land requirement for a Rural Based Enterprise Precinct.
Other Enterprise Precinct Opportunities	▪ n.a.	▪ Determine appropriate locations close to Capalaba. Investigate potential to establish a 50+ha precinct on Old Cleveland Rd, Birkdale.	▪ Investigate opportunity for export oriented enterprise precinct within Birkdale
Demand for Industrial Lands	▪ The current city's network of industrial lands and the integrated employment area at Redland Bay provides sufficient opportunity to accommodate forecast demand for industrial land to 2031.	▪ Demand for industry uses will be in line with population requirements. Currently enough industry land to cope with forecast population growth at a city level. Potential that some industrial areas become increasingly constrained.	▪ Growing at slower rates than forecast at a regional level. ▪ Potentially review individual industry areas by industrial use to determine the net supply equation by each area. Continue monitoring.

4 Investment Profile

The current and recent historical investment profile for Redland City highlights which local industries are attracting investment and subsequently the growth potential for industries in the City. An examination of recent business count data also informs industry strengths and opportunities.

4.1 INVESTMENT PROJECTS

Through analysis of projects that are recently completed, proposed, and in the early planning phase, we have identified the major industries that have, or are looking to invest in Redland City Council. The following section outlines the top 10 projects within Redland City Council by estimated value as well as identifying the value of the proposed future investment profile of the region for the next 8 years to 2020.

Those projects have a current classification of either possible, early planning, firm, commenced or completed have been included in the analysis, whilst those projects that have either been deferred or abandoned have not been included. Furthermore, we have discarded those projects that are less than one million dollars in value.

Table 4.1 outlines the top 10 projects by value within Redland City Council. The following points provide a brief overview:

- The project with the highest value within Redland City Council is the Churches of Christ Care Aged Care Facility and Retirement Village in Thornlands. Located at 100-102 Kinross Road in Thornlands, the project comprises 305 aged care facility units and has an estimated project value of approximately $80 million. The current project status is listed as “possible”, and if developed would be completed by around 2017.

- Rounding out the top 10 projects by value within Redland City Council is Stage 2 of the RSL Care Moreton Shores Retirement Village. Located at 101 King Street in Thornlands, Stage 2 of the retirement village development comprises a one and two storey, 60 bed aged care facility. The additional Stages 3 and 4 of the retirement village development are also listed in the project investment list, which includes 63 independent living units, however are of a smaller project value than Stage 2. The multi staged retirement community was fully developed in 2011.

- Of the top 10 projects by value within the Redland City Council, 60% fall within the health care and social assistance industry classification and are generally retirement village dwellings or aged care facilities. Education and training comprise 20% of the top 10, whilst mixed use projects also make up 20% of the top 10 projects by value. This provides a good indication of the reliance on this industry for investment within Redland.

- The average value of projects within the top 10 list is around $22.5 million.

Similar to the historic and current investment projects within Redland City Council, the level of investment in the Social Assistance and Health Care as well as the Education and Training industries are expected to provide the majority of the investment activity in the near future (refer Table 4.1). These industries are expected to provide around $198.4 million (or 48% of total investment) and $118.5 million of investment (or 29% of total investment) respectively (refer Chart 4.1).

Apart from a number of mixed use projects that total around $57 million in value, all other industries only contribute a small amount of value and comprise only 9% of the total level of investment within the Redland City Council region.

Top 10 Projects by Estimated Value

REDLANDS CITY COUNCIL

TABLE 4.1

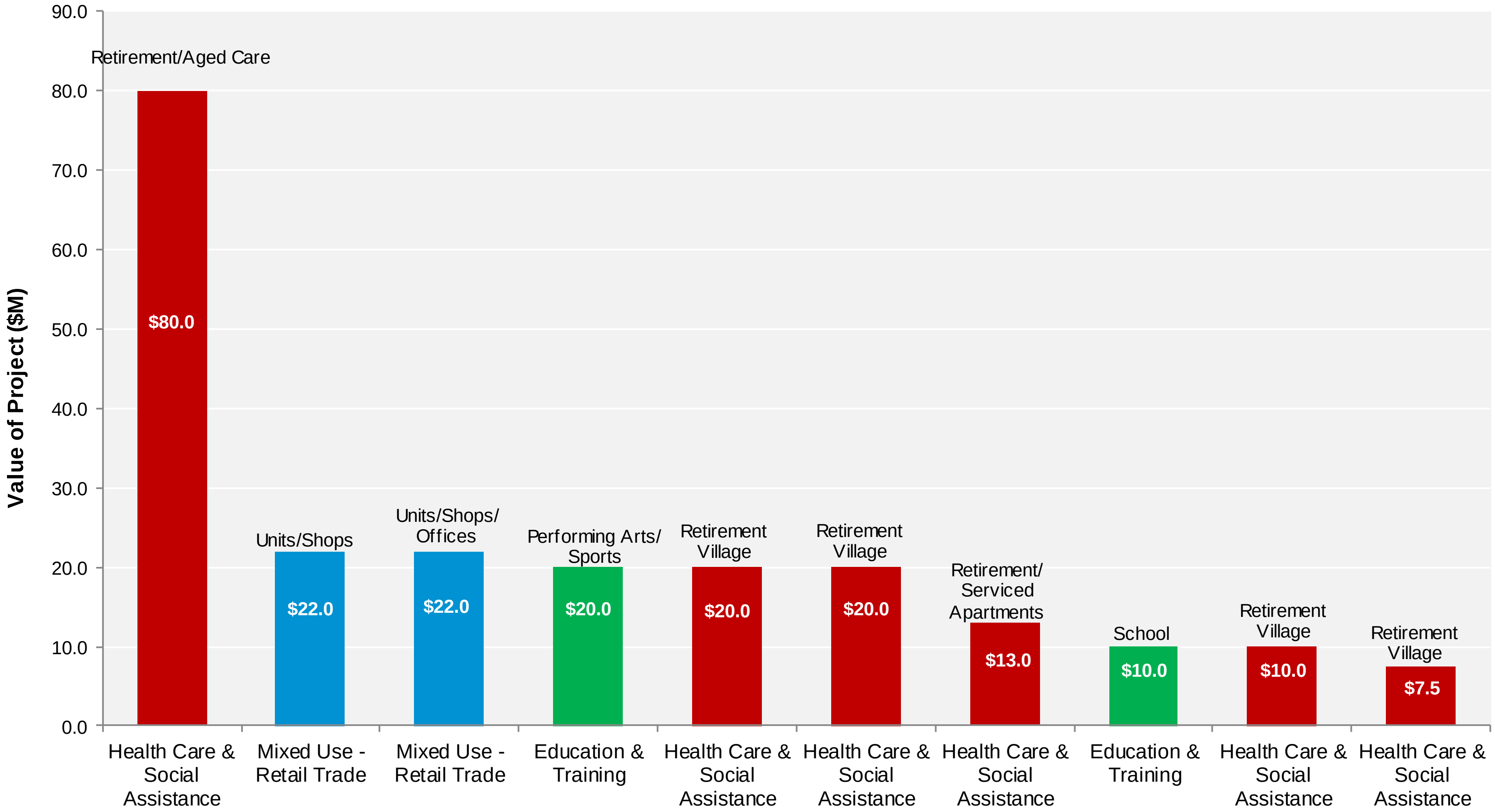
Project Title	Industry of Employment	Project Address	Suburb	Project Description	Est. Value ($M)	Est. Year Complete	Status
Churches Of Christ Care Thornlands Aged Care Facility & Retirement Village	Health Care & Social Assistance	100-102 Kinross Rd	Thornlands	305 Aged Care Facility Units	$80.0	2017	Possible
Queen Street Mixed Use Development	Mixed Use - Retail Trade	140-146 Queen St	Cleveland	92 Units/Shops - 6 storey	$22.0	2013	Possible
Bloomfield Street Mixed Develoment	Mixed Use - Retail Trade	219-221 Bloomfield St	Cleveland	87 Units/Shops/ Offices	$22.0	2016	Possible
Sheldon College Theatre & Sports Facilities	Education & Training	Taylor Rd	Thornlands	Performing Arts/ Sports Facilities	$20.0	2020	Possible
Renaissance Retirement Village Victoria Point	Health Care & Social Assistance	36-40 Bunker Rd	Victoria Point	130 Units - Stage 15	$20.0	2016	Early
Fernbourne Grove Garden Villas	Health Care & Social Assistance	55-107 Fernbourne Rd	Wellington Point	Retirement Village - Stages 4 /5/6	$20.0	2015	Possible
Renaissance Retirement Village Victoria Point Serviced Apartments	Health Care & Social Assistance	36-40 Bunker Rd	Victoria Point	80-160 Apartments	$13.0	2015	Possible
Thornlands South Primary School	Education & Training	57 Ziegenfusz Rd	Thornlands	Stage 1	$10.0	2010	Completed
Tranquil Waters Retirement Village	Health Care & Social Assistance	31 Thompson St	Victoria Point	51 Units - Stages 9/10	$10.0	2010	Completed
RSL Care Moreton Shores Retirement Village	Health Care & Social Assistance	101 King St	Thornlands	Stage 2	$7.5	2010	Completed

Source: Cordell Connect; Urbis

Top Ten Projects by Industry Type

REDLANDS CITY COUNCIL

CHART 4.1



Source: Cordell Connect; Prepared by Urbis

Project Value by Year[1]

REDLANDS CITY COUNCIL, $ MILLIONS

TABLE 4.2

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Total
Accommodation and Food Services	-	-	-	-	1.2	-	-	-	-	-	-	-	**1.2**
Education and Training	16.7	57.4	18.3	1.5	4.5	-	-	-	-	-	-	20.0	**118.5**
Health Care and Social Assistance	5.0	18.5	8.1	18.3	11.0	4.5	33.0	20.0	80.0	-	-	-	**198.4**
Manufacturing	4.0	-	1.2	2.0	2.0	-	-	-	-	-	-	-	**9.2**
Mining	-	-	-	-	-	-	-	5.0	-	-	-	-	**5.0**
Mixed Use - Retail Trade	-	-	-	-	22.0	-	-	-	-	-	-	-	**22.0**
Mixed Use - Retail Trade; Professional, Scientific & Technical Services; Accommodation & Food Services	-	-	-	-	-	-	6.0	-	-	-	-	-	**6.0**
Mixed Use - Retail Trade; Professional, Scientific &Technical Services; Health Care & Social Assistance	-	-	-	-	1.8	-	-	-	-	-	-	-	**1.8**
Mixed Use - Retail Trade; Professional, Scientific & Technical Services	-	-	-	-	-	-	-	22.0	-	-	-	-	**22.0**
Mixed Use - Retail Trade; Professional, Scientific & Technical Services; Accommodation & Food Services	-	5.0	-	-	-	-	-	-	-	-	-	-	**5.0**
Other Services	2.8	-	-	-	-	-	-	-	-	-	-	-	**2.8**
Public Administration and Safety	3.0	-	-	2.5	-	-	-	-	-	-	-	-	**5.5**
Retail Trade	-	-	8.7	-	1.2	1.1	-	-	-	-	-	-	**11.0**
Wholesale Trade	-	1.8	-	-	-	-	-	-	-	-	-	-	**1.8**
Total Value	**31.5**	**82.7**	**36.3**	**24.3**	**43.7**	**5.6**	**39.0**	**47.0**	**80.0**	**0.0**	**0.0**	**20.0**	**410.1**

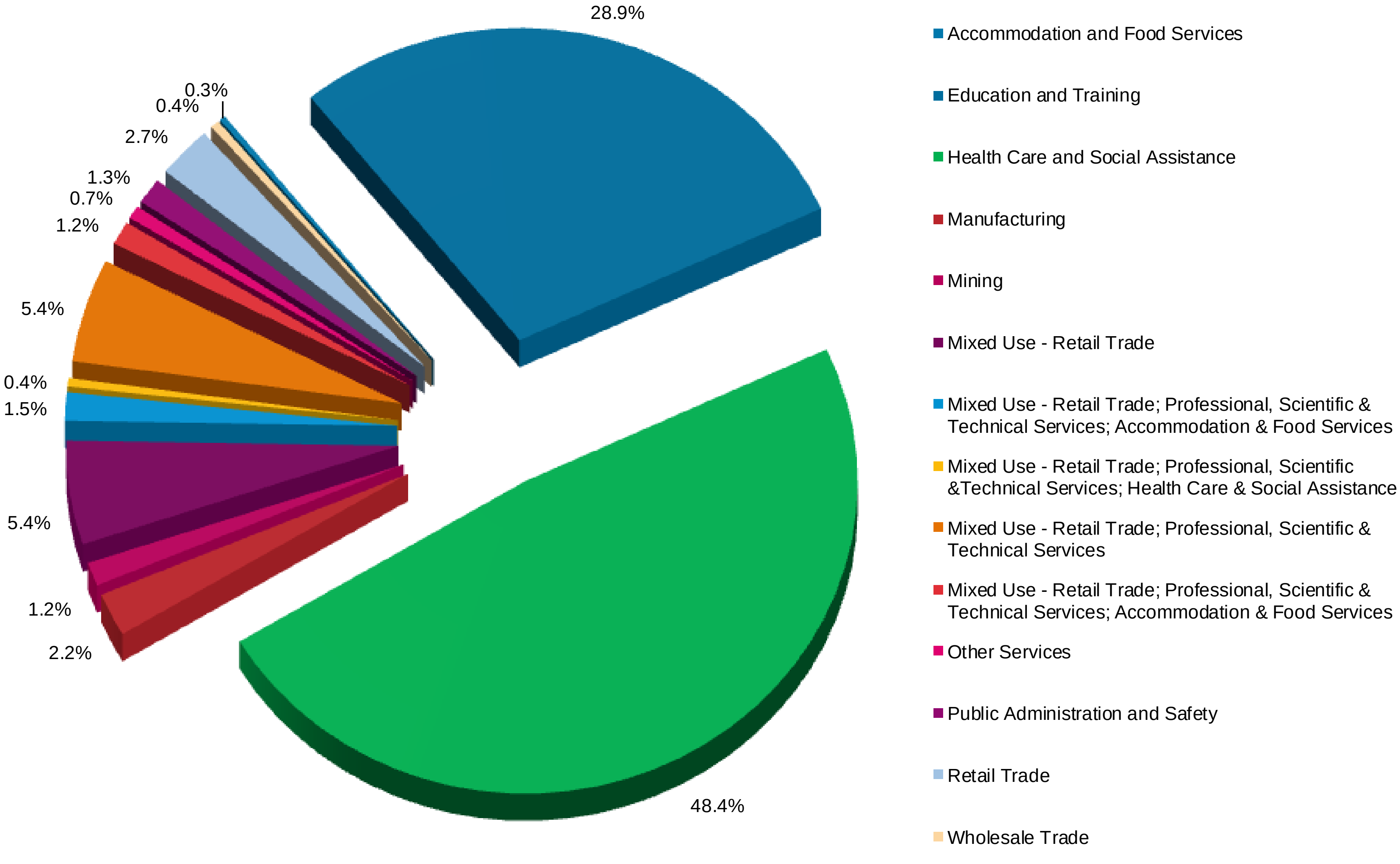
1 Only includes new projects over $1million in value. Does not include residential or infrastructure projects

Source: Cordell Connect; Urbis

Share of Project Value

REDLANDS CITY COUNCIL

CHART 4.2



Source: Cordell Connect; Prepared by Urbis

4.2 BUSINESS COUNTS

The Australian Bureau of Statistics releases time series data of business counts at a Statistical Area 2 level by employee number and by turnover. These business counts provide an indication of the strength of particular industries as well as the growth of industry businesses that have occurred within a designated area (i.e. Redland City Council).

Table 4.3 provides an overview of the number of businesses by employee by 1 digit ANZSIC within Redland City Council. The key points are outlined below:

- As of June 2011, there were some 11,060 businesses operating within the Redland City Council municipality. Of these, almost 60% comprise businesses that were non-employing, 25% employed between 0 and 4 employees, 12% employed 5 to 19 employees and around 3% of businesses employed 20 or more people.

- A large proportion of businesses that did not employ any people were within the Construction, and the Rental, Hiring and Real Estate Services industries. The high number of non-employing businesses within these industries is suggestive of the sub-contractor nature of these industries, especially within the construction sector.

- There were a large number of businesses in the Construction, and Professional, Scientific and Technical Services industries that employed between 0 and 4 employees. Within Redland City Council these industries comprised approximately 724 and 403 businesses respectively.

- There were a high number of medium sized businesses, who employ between 5 and 19 people, within the Construction, Retail Trade, Agriculture, Forestry and Fishing, and Professional, Scientific and Technical Services industries.

- A large proportion of businesses that comprised 20 or more employees were within the Accommodation and Food Services, Retail Trade, Construction, and Health Care and Social Assistance industries.

Number of Businesses by Employee

REDLAND CITY COUNCIL, 2011 TABLE 4.3

1 Digit ANZSIC	Non employing	0-4 Employees	5-19 Employees	20+ Employees	Total
Agriculture, Forestry and Fishing	440	133	124	10	707
Mining	8	6	3	3	20
Manufacturing	246	134	105	39	524
Electricity, Gas, Water and Waste Services	24	0	9	3	36
Construction	1,473	724	238	45	2,480
Wholesale Trade	190	124	74	24	412
Retail Trade	330	202	154	55	741
Accomodation and Food Services	72	85	99	64	320
Transport, Postal and Warehousing	399	193	57	12	661
Information Media and Telecommunications	42	27	6	3	78
Financial and Insurance Services	550	120	39	3	712
Rental, Hiring and Real Estate Services	1,009	123	53	18	1,203
Professional, Scientific and Techincal Services	673	403	111	16	1,203
Administrative and Support Services	269	139	48	24	480
Public Administration and Safety	31	9	3	6	49
Education and Training	75	30	18	3	126
Health Care and Social Assistance	186	123	60	41	410
Arts and Recreation Services	75	27	9	12	123
Other Services	279	184	92	12	567
Not Classified	145	59	6	0	210
Total	**6,516**	**2,845**	**1,308**	**393**	**11,062**

Source : Australian Bureau of Statistics Australian Business Counts ; Urbis

Table 4.4 below provides an overview of the number of businesses by employee by 1 digit ANZSIC as well as the growth in industry businesses between 2009 and 2011within the Redland City Council municipality.

Over the three year period, there was a total increase of some 112 businesses in Redland City of which a significant amount were in the non-employing businesses category. Of note, those industries that experienced a significant increase in the number of businesses in Redland City Council included the Professional, Scientific and Technical Services industry, and the Financial and Insurance Services industry. Significant decreases in businesses were experienced within the Accommodation and Food Services industry, the Construction industry as well as the Transport, Postal and Warehousing industry.

Industries of note that experienced a significant increase in the number of businesses employing no people comprised a number of service industries which included the Professional, Scientific and Technical Services, Financial and Insurance Services, and the Administrative and Support Services industries. These industries experienced increases of some 74, 50 and 32 businesses respectively between 2009 and 2011. Significant losses of businesses in the non-employing business category were experienced within the Transport, Postal and Warehousing industry which decreased 27 businesses over the three year period.

- **Small sized businesses,** employing 0 to 4 employees, experienced a small increase of some 14 businesses over the 3 year period. Significant increases were experienced within the Health Care and Social Assistance, and Administrative and Support Services industries, whilst decreases in the number of businesses were experienced within the Manufacturing, Rental, Hiring and Real Estate Services, and Professional, Scientific and Technical Services industries. It should be noted that non-employing businesses refer to businesses that are either sole proprietorships or partnerships without employees. This has potential implications for required land (i.e. growth in the proportion of people represented within this category may ease demand for employment land as many of these businesses, including sub-contractors, will not require a permanent workspace.

Medium sized businesses, employing between 5 and 19 employees, in Redland City Council experienced a decrease of 36 businesses over the three year period from 2009 to 2011. Significant losses in businesses in this category were experienced in the Construction (-23 businesses), Retail Trade (-15 businesses), and Accommodation and Food Services (-14 businesses) industries. Of the industries that saw an increase in businesses, the Transport, Postal and Warehousing, Professional, Scientific and Technical Services, and Other Services all experienced an increase of 11 industries.

Larger businesses, employing greater than 20 employees, experienced a decrease of 52 businesses between 2009 and 2011. The Wholesale Trade, and Healthcare and Social Assistance industries decreased the greatest with 15 and 11 less businesses respectively, whilst Other Services and the Manufacturing industries experienced the greatest increases in businesses at 9 and 5 businesses respectively.

Change in the Number of Businesses by Employee

REDLAND CITY COUNCIL, 2009-11

TABLE 4.4

1 Digit ANZSIC	Non employing	1-4 Employees	5-19 Employees	20+ Employees	Total
Agriculture, Forestry and Fishing	-19	12	-6	2	-11
Mining	-2	-6	0	0	-8
Manufacturing	-12	-23	8	5	-22
Electricity, Gas, Water and Waste Services	-3	0	3	-3	-3
Construction	-8	12	-23	-9	-28
Wholesale Trade	26	-7	-5	-15	-1
Retail Trade	13	-15	-15	-2	-19
Accomodation and Food Services	-16	7	-14	-6	-29
Transport, Postal and Warehousing	-27	-3	11	-6	-25
Information Media and Telecommunications	12	15	-3	3	27
Financial and Insurance Services	50	-16	7	0	41
Rental, Hiring and Real Estate Services	22	-21	-3	-3	-5
Professional, Scientific and Techincal Services	74	-20	11	-1	64
Administrative and Support Services	32	22	-13	-9	32
Public Administration and Safety	1	0	-3	-3	-5
Education and Training	9	-3	3	3	12
Health Care and Social Assistance	2	25	-2	-11	14
Arts and Recreation Services	10	15	-6	-6	13
Other Services	21	-3	11	9	38
Not Classified [1]	1	23	3	0	27
Total	**186**	**14**	**-36**	**-52**	**112**

Source : Australian Bureau of Statistics Australian Business Counts ; Urbis

4.3 SUMMARY AND IMPLICATIONS

The following points provide a brief summary of the above sections and any implications that these points may have on the employment review study.

- Given the aged profile and socio-economic characteristics of the Redland City Council municipality there is a strong level of investment within the Aged Care and Social Assistance industry. Investment into this industry is expected to continue to outweigh the other industries as the population of the City continues to age. As a result of this ageing population, we expect the employment within this industry sector to overtake the Retail sector as the highest employment sector in the future.

- Non-employing businesses comprise the majority of the businesses within Redland City Council and are dominated by individuals working within the construction industry. These individuals suggest a high level of sub-contractor trade workers. Growth in non-employing businesses has been significant over the last two years. These businesses are not significant employers however and don't represent a significant shift in requirements for employment land.

- There were around 112 additional businesses in 2011 compared to 2009. Of these, a large proportion comprised non-employing businesses within the Professional, Scientific and Technical Services, Financial and Insurance Services, as well as Administrative and Support Services.

5 Employment Analysis

The 2010 Redland City Centres and Employment Strategy (The Strategy) forecast that between 2006 and 2031 an additional 17,900 jobs would be provided within Redland City. This section of the report reviews the latest 2011 Census of Population and Housing Employment Data against the forecast employment growth for the City.

5.1 TOTAL EMPLOYMENT

Total employment within Redland City over the last five years has grown at a slower rate than the previous five years. Between 2001 and 2006, Redland City's employment grew by 5,874 employees, whilst between 2006 and 2011 Redland City employment grew by 3,501 jobs.

Employment Change

REDLAND CITY, 2001-2011 TABLE 5.1

				Change 2001-2006		Change 2006-2011	
	2001	**2006**	**2011**	**No.**	**%**	**No.**	**%**
City workforce	52,400	61,700	67,959	9,300	18%	6,259	10%
City job stock (local jobs)	26,200	32,074	35,575	5,874	22%	3,501	11%
City workforce employed in City	20,100	24,700	27,291	4,600	23%	2,591	10%
City workforce employed outside City	32,300	37,000	40,668	4,700	15%	3,668	10%

Source : ABS; SGS Economics & Planning; Urbis

Interestingly, the number of the city's resident workforce working locally increased at a slightly higher rate than the total employment, indicating that the aim of increasing the self-sufficiency rate is heading in the right direction.

5.2 FORECAST GROWTH

Over the past five years, employment in the City has grown slightly slower than originally forecast within the strategy. Table 5.2 shows the difference between the forecast growth and actual growth between 2006 and 2011 within Redland City.

Forecast vs Actual Employment Change

REDLAND CITY, 2006 -2031 TABLE 5.2

	Redland City					
	2006	**2011**	**2016**	**2021**	**2026**	**2031**
Forecast						
Forecast Employment Growth	32,095	36,394	40,335	43,918	47,322	50,009
Forecast Growth		4,299	3,941	3,583	3,404	2,687
Actual						
Actual Employment Growth	32,095	35,593				
Actual Growth		3,498				
Difference						
Actual - Forecast		-801				
% Difference		-19%				

Source : ABS Census of Population and Housing; SGS Economics & Planning; Urbis

The key points to note from table 5.2 are as follows:

- If we compare the actual 2011 employment figure to the 2011 forecast figure as shown in the 2010 Redland City Centres and Employment Strategy we can observe that total employment for Redland City is tracking slightly behind the forecast figure (801 jobs or 19% below).
- The implication of lower than expected employment growth is lower demands on employment land. At a high level, this would suggest that employment land supply within the city is sufficient to meet current levels of demand (as demand has been lower than previously forecast).
- The employment within the City needs to be continually monitored going forward to ascertain how the actual employment growth tracks against the forecast growth.

5.2.1 FORECAST EMPLOYMENT

For the purposes of this review we have realigned the employment forecasts made within the 2010 strategy to reflect recent growth trends. By adopting the actual employment count for 2011 and the previously forecasted growth rates we can realign the forecasts used within the strategy to reflect recent growth trends. It should be noted that these realigned forecasts have relied upon the assumptions used within the Redland City Centres and Employment Strategy and have not taken into account any other factors than historic employment growth.

By rebasing the forecasts we can see total forecast employment has declined by around 1,100 employees by 2031 to 48,908 jobs. The previous five year period yielded around 800 jobs less than the forecasts outlined within the strategy. However the previous five years has represented a relatively slow growth period. Going forward, employment growth is forecast to decline in line with an ageing population and a subsequent declining resident workforce. A small portion of this may be alleviated by lifting the retirement age as discussed in the 2010 Intergenerational report “Australia to 2050: Future Challenges”, issued by the Australian Government. It is understood that the policy implementation has already commenced.

Forecast vs Actual Employment Change

REDLAND CITY, 2006 -2031 TABLE 5.3

	Redlands City					
	2006	**2011**	**2016**	**2021**	**2026**	**2031**
Forecast (2010 Employment Strategy)						
Forecast Employment Growth	32,095	36,394	40,335	43,918	47,322	50,009
Forecast Growth	-	4,299	3,941	3,583	3,404	2,687
Forecast Avg. Annual Growth Rate	-	2.5%	2.1%	1.7%	1.5%	1.1%
Actual						
Actual Employment Growth	32,095	35,593	-	-	-	-
Actual Growth	-	3,498	-	-	-	-
Actual Avg. Annual Growth Rate	-	2.1%	-	-	-	-
Revised Forecasts						
Forecast Employment Growth	-	-	39,447	42,951	46,280	48,908
Forecast Growth	-	-	3,854	3,504	3,329	2,628
Forecast Avg. Annual Growth Rate	-	-	2.1%	1.7%	1.5%	1.1%
Difference						
Actual & Forecast	-	-801	-87	-79	-75	-59
% Difference	-	-18.6%	-2.2%	-2.2%	-2.2%	-2.2%

Source : ABS Census of Population and Housing; SGS Economics & Planning; Urbis

5.2.2 REVIEWING THE STRATEGY

FACTOR/MEASURE	2010 STRATEGY	2012 REVIEW	CHANGE/RESPONSE
2011 Employment	36,394	35,593	-801 Jobs
2031 Employment	50,009	48,908	-1,101 jobs

It should be noted that the revised figures do not consider the potential impact of the Rural Futures Strategy, which seeks to stimulate the rural economy, or the potential for adding an additional employment area at Birkdale (as discussed in Section 3).

Assuming jobs within Redland City reached 48,908 jobs by 2031 and forecast Redland City Employed Residents reached 76,656 by 2031 (as outlined within Section 2.2); Redland City would achieve a self-sufficiency rate of around 64%.

5.3 GROWTH BY INDUSTRY

The following section reviews the employment growth initially by 1 digit ANZSIC code.

5.3.1 ONE DIGIT

Over the last five years the significant employment growth industry within Redland City has been Health Care and Social Assistance, with the major industry in decline being Wholesale Trade. Table 5.4 below shows growth by one digit ANZSIC code for Redland City over the last 5 years.

Employment by Industry

REDLAND CITY, 2006-2011 TABLE 5.4

	2006		2011		Growth
	Employment	% of Total	Employment	% of Total	(2006-2011)
Health Care & Social Assistance	3,832	12%	5,067	14%	1,235
Professional, Scientific & Technical Services	1,393	4%	1,958	6%	565
Accommodation & Food Services	2,469	8%	2,914	8%	445
Education & Training	3,158	10%	3,569	10%	411
Construction	2,661	8%	2,998	8%	337
Other Services	1,447	5%	1,641	5%	194
Retail Trade	5,507	17%	5,689	16%	182
Manufacturing	3,001	9%	3,149	9%	148
Transport, Postal & Warehousing	1,000	3%	1,109	3%	109
Information Media & Telecommunications	387	1%	466	1%	79
Electricity, Gas, Water & Waste Services	210	1%	281	1%	71
Financial & Insurance Services	609	2%	669	2%	60
Arts & Recreational Services	400	1%	443	1%	43
Mining	224	1%	255	1%	31
Public Administration & Safety	1,486	5%	1,507	4%	21
Inadequately Described	373	1%	368	1%	-5
Administrative & Support Services	1,179	4%	1,140	3%	-39
Agriculture, Forestry & Fishing	374	1%	313	1%	-61
Rental, Hiring & Real Estate Services	881	3%	755	2%	-126
Wholesale Trade	1,483	5%	1,284	4%	-199
Total	**32,074**	**100%**	**35,575**	**100%**	**3,501**

Source : ABS; SGS Economics & Planning; Urbis

The key points to note from table 5.4 are as follows:

- Health Care and Social Assistance has represented over 35% of job growth within Redland City over the last five years.
- Professional, Scientific and Technical Services have also grown significantly (565 jobs over the last 5 years) as well as Accommodation and Food Services (445 jobs).
- Whilst Retail Trade also grew in gross terms, the proportion the industry represented as total employment within the Redlands declined from 17% to 16%.

The following table outlines how recent employment growth compares to the forecasts used within the 2010 Strategy. It is important to note that in the 2010 Employment Strategy the 1993 version of the Australian and New Zealand Standard Industrial Classification (ANZSIC) were used to forecast growth. This review has adopted the 2006 version of the ANZSIC codes and has therefore attempted to align the forecast growth by industry (as shown in 2010 Strategy) to the 2006 1 digit industry classifications. The result of this is that the forecast growth numbers may not be completely reflective of the assumptions used within the Strategy regarding growth by industry, however the direction of growth for each industry and the approximate volume are comparable.

Employment Change by Industry

REDLAND CITY, 2006-2031 TABLE 5.5

Industry		Actual 2006 No.	2011 No.	2006-2011 Growth No.	%	Forecast Growth 2006-2031
Health Care & Social Assistance		3,832	5,067	1,235	32%	2,112
Professional, Scientific & Technical Services	1	1,393	1,958	565	41%	1,546
Accommodation & Food Services		2,469	2,914	445	18%	1,240
Education & Training		3,158	3,569	411	13%	1,712
Construction		2,661	2,998	337	13%	1,906
Other Services		1,447	1,641	194	13%	1,281
Retail Trade		5,507	5,689	182	3%	2,041
Manufacturing		3,001	3,149	148	5%	288
Transport, Postal & Warehousing		1,000	1,109	109	11%	776
Information Media & Telecommunications		387	466	79	20%	216
Electricity, Gas, Water & Waste Services		210	281	71	34%	37
Financial & Insurance Services		609	669	60	10%	377
Arts & Recreational Services		400	443	43	11%	1,039
Mining		224	255	31	14%	8
Public Administration & Safety		1,486	1,507	21	1%	1,074
Inadequately Described		373	368	-5	-1%	
Administrative & Support Services	1	1,179	1,140	-39	-3%	1,308
Agriculture, Forestry & Fishing		374	313	-61	-16%	-1
Rental, Hiring & Real Estate Services	1	881	755	-126	-14%	978
Wholesale Trade		1,483	1,284	-199	-13%	-25
Redland Total		**32,074**	**35,575**	**3,501**	**11%**	**17,913**

1 Forecasts for Property and Business Services under the 2010 Strategy have been split between 3 industry sectors as a pro rata share

Source: Census of Population and housing 2006 and 2011; Urbis

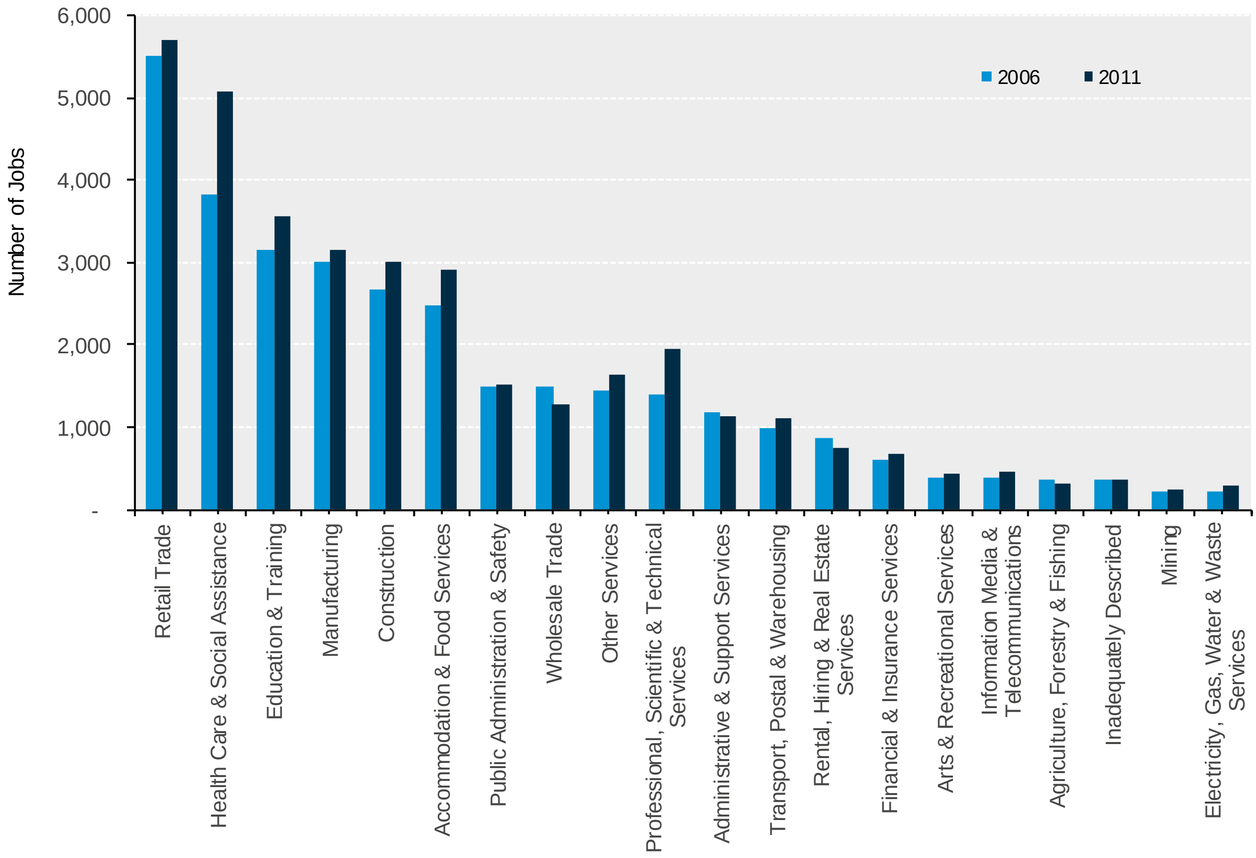
- As per the 2010 Strategy, the top seven growth industries over the last seven years have aligned with the forecast growth patterns, with the top growth industry being Health Care and Social Assistance. The strategy outlined growth within Health Care and Social Assistance of 2,112 jobs over the 25 year period to 2031. In the last five years this industry has experienced over 58% of the 25 year forecast growth, highlighting the importance of this industry moving forward.

- Not surprisingly, Public Administration and Safety has remained relatively unchanged, contrary to what was outlined in the 2010 Strategy. This has been primarily reflective of the current economic environment more so than any other factors.

- Under the 2010 strategy, Wholesale Trade was forecast to decline over the forecast period by around 25 jobs. The five years to 2011 Wholesale Trade has already experienced significant decline reducing by almost 200 jobs.

Employment by Industry

REDLAND CITY, 2006 - 2011 CHART 5.1



Source : ABS; SGS Economics & Planning; Urbis

By combining the forecast growth trends outlined within the 2010 Strategy and the recent growth trends within Redland City Council between 2006 and 2011 we can determine a new baseline employment forecast. This forecast is purely based on historic and forecast trends and does not consider potential strategies Redland City Council may employ to stimulate economic growth. The key points to note from Table 5.6 are as follows:

- Considerable growth within the Health Care and Social Assistance industry is expected to continue all be it at a reduced rate to what has been experienced in the past 5 years.
- Limited growth over the last five years within the Arts and Recreational industry has seen forecasts reduced.
- A reduction in Administrative and Support Services over the past five years has seen a reduction in forecasts.
- Overall forecasts have dropped by 1,079 employees by 2031.

Employment Forecast Review

REDLAND CITY, 2006-2031 TABLE 5.6

Industry	2011 Actual No.	2031 Employment Forecasts 2010 Strategy No.	Revised Strategy No.	Difference No.
Health Care & Social Assistance	5,067	5,944	7,454	1,510
Professional, Scientific & Technical Services [1]	1,958	2,939	3,426	487
Accommodation & Food Services	2,914	3,709	3,894	185
Education & Training	3,569	4,870	5,060	190
Construction	2,998	4,567	4,149	-418
Other Services	1,641	2,728	2,183	-545
Retail Trade	5,689	7,548	7,413	-135
Manufacturing	3,149	3,289	3,390	101
Transport, Postal & Warehousing	1,109	1,776	1,754	-22
Information Media & Telecommunications	466	603	669	66
Electricity, Gas, Water & Waste Services	281	247	341	94
Financial & Insurance Services	669	986	1,022	36
Arts & Recreational Services	443	1,439	744	-695
Mining	255	232	281	49
Public Administration & Safety	1,507	2,560	1,875	-685
Inadequately Described	368	373	368	-5
Administrative & Support Services [1]	1,140	2,487	1,841	-647
Agriculture, Forestry & Fishing	313	373	312	-61
Rental, Hiring & Real Estate Services [1]	755	1,859	1,455	-404
Wholesale Trade	1,284	1,458	1,275	-183
Redland Total	**35,575**	**49,987**	**48,908**	**-1,079**

1 Forecasts for Property and Business Services under the 2010 Strategy have been split between 3 industry sectors as a pro rata share

Source: Census of Population and housing 2006 and 2011; Urbis

5.3.2 REVIEWING THE STRATEGY

FACTOR/MEASURE	2010 STRATEGY	2012 REVIEW	CHANGE/RESPONSE/COMMENTS
Health Care and Social Assistance	Significant Growth Industry – Represents 12% of future growth	Very Significant Growth Industry – Has represented 35% of net jobs growth over the last 5 years	With an increasing resident population of over 65 year olds, we see this industry as having enormous jobs growth potential.
Education and Training	Identified as the 5th largest growth industry	Strong growth in the last five years reaffirms the significant role education is currently playing and will play in the future of Redland City.	Ability to leverage from the growing health care and social assistance industry, future training opportunities Leverage from established, well recognised education facilities. Potential to pursue international opportunities.

5.3.3 FOUR DIGIT

In order to understand the growth industries in detail the following section reviews the top 30 growth industries and the top 30 industries in decline by four digit ANZSIC code for Redland City.

Top 30 Growth Industries by 4 Digit ANZSIC

REDLAND CITY

TABLE 5.6

Industry	2006	2011	2006-2011 Growth No.	2006-2011 Growth %
Hospitals (except Psychiatric Hospitals)	752	1,169	417	55%
Computer System Design and Related Services	0	333	333	n.a
Takeaway Food Services	920	1,234	314	34%
Primary Education	1,190	1,394	204	17%
Combined Primary and Secondary Education	400	595	195	49%
Other Social Assistance Services	285	479	194	68%
Aged Care Residential Services	892	1,080	188	21%
Electrical Services	270	445	175	65%
Child Care Services	565	730	165	29%
Manufacturing, nfd	243	384	141	58%
Urban Bus Transport (Including Tramway)	40	153	113	283%
Poultry Processing	506	603	97	19%
Pharmaceutical, Cosmetic and Toiletry Goods Retailing	267	360	93	35%
Plumbing Services	172	260	88	51%
Management Advice and Related Consulting Services	139	226	87	63%
Cafes and Restaurants	770	850	80	10%
Other Allied Health Services	161	239	78	48%
Hairdressing and Beauty Services	380	458	78	21%
Engineering Design and Engineering Consulting Services	141	218	77	55%
Secondary Education	676	750	74	11%
Accommodation	199	269	70	35%
Accounting Services	347	414	67	19%
Other Personal Services nec	93	153	60	65%
Dental Services	165	225	60	36%
Labour Supply Services	73	124	51	70%
Clubs (Hospitality)	231	281	50	22%
Hardware and Building Supplies Retailing	334	383	49	15%
Electrical, Electronic and Gas Appliance Retailing	215	264	49	23%
Gardening Services	136	183	47	35%
Bread Manufacturing (Factory based)	95	142	47	49%
Redland Total	**32,106**	**35,593**	**3,487**	**11%**

Source: Census of Population and housing 2006 and 2011; Urbis

The following key points can be drawn from Table 5.6:

- Top five growth industries between 2006 and 2011 included Hospitals (417 jobs), Computer System Design and Related Services (333 jobs), Takeaway Food Services (314 jobs), Primary Education (204 jobs) and Combined Primary and Secondary Education (195 jobs).

- Industries that have grown as a result of an ageing population that feature within the top 30 growth industries include Hospitals (417 jobs), Other Social Assistance Services (285 jobs), Aged Care Residential Services (188 jobs), Pharmaceutical, Cosmetic and Toiletry Goods Retailing (93 jobs) and Other Allied Health Services (78 jobs).

- Notably, Education and Child Care has continued to grow within Redland City with Primary Education (204 jobs), Combined Primary and Secondary Education (195 jobs), Child Care Services (165 jobs) and Secondary Education (74 jobs).

- Poultry Processing was the only agricultural growth industry within the top 30 over the last five years.

Top 30 Industries in decline by 4 Digit ANZSIC

REDLAND CITY

TABLE 5.7

Industry	2006	2011	2006-2011 Growth No.	2006-2011 Growth %
Whiteware Appliance Manufacturing	240	68	-172	-72%
Other Electrical and Electronic Goods Wholesaling	252	126	-126	-50%
Furniture Retailing	201	126	-75	-37%
Scientific Research Services	102	36	-66	-65%
Other Agricultural Product Wholesaling	247	183	-64	-26%
Interurban and Rural Bus Transport	58	0	-58	-100%
Technical and Vocational Education and Training	252	197	-55	-22%
Pubs, Taverns and Bars	242	192	-50	-21%
Polymer Film and Sheet Packaging Material Manufacturing	47	0	-47	-100%
Local Government Administration	858	816	-42	-5%
House Construction	699	657	-42	-6%
Printing	109	67	-42	-39%
Preschool Education	111	69	-42	-38%
Newspaper Publishing	194	157	-37	-19%
Heavy Machinery and Scaffolding Rental and Hiring	70	35	-35	-50%
Real Estate Services	518	485	-33	-6%
Other Grocery Wholesaling	102	70	-32	-31%
Building Pest Control Services	104	74	-30	-29%
Video and Other Electronic Media Rental and Hiring	82	53	-29	-35%
Other Manufacturing nec	31	5	-26	-84%
Industrial and Agricultural Chemical Product Wholesaling	50	25	-25	-50%
Other Administrative Services nec	55	32	-23	-42%
Electric Lighting Equipment Manufacturing	76	54	-22	-29%
Other Store-Based Retailing nec	286	265	-21	-7%
Carpentry Services	164	144	-20	-12%
Wooden Structural Fitting and Component Manufacturing	153	133	-20	-13%
Nursery Production (Under Cover)	20	0	-20	-100%
Bricklaying Services	47	28	-19	-40%
Investigation and Security Services	86	69	-17	-20%
Leather Tanning, Fur Dressing and Leather Product Manufacturing	17	0	-17	-100%
Redland Total	**32,106**	**35,593**	**3,487**	**11%**

Source: Census of Population and housing 2006 and 2011; Urbis

- Of note, White ware Appliance Manufacturing (-172 jobs) and Other Electrical and Electronic Goods Wholesaling (-126 jobs) declined between 2006 and 2011, signifying the closure of Fisher and Paykel in 2009.

- Manufacturing in general has declined with notable declines being Polymer Film and Sheet Packaging Material Manufacturing (-47 jobs), Electric Lighting Equipment Manufacturing (-20 jobs), Wooden Structural Fitting and Component Manufacturing (-20 jobs) and Leather Tanning, Fur Dressing and Leather Product Manufacturing (-17 jobs).

- The top 30 industries in decline accounted for around 1,300 job losses for the City.

5.4 EMPLOYMENT SELF-SUFFICIENCY

Employment self-sufficiency refers to the ratio of jobs in the local area to the number of employed residents living in the area.

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 had approximately 61,700 working residents and a local job stock of approximately 32,100 jobs. By 2011, this had increased to approximately 68,000 working residents and 35,500 local jobs. In total, the rate of employment self-sufficiency remained very similar, moving from 52.0% to 52.3%. Of the compared locations, Redland represents the lowest level of self-sufficiency, particularly when compared to Brisbane; however this is not unexpected given Brisbane City's role as the hub of economic activity in South East Queensland.

Employment Self-Sufficiency

REDLAND CITY AND COMPARATIVE LGA, 2006 - 2011 TABLE 5.8

	Gold Coast		Redland		Tweed		Brisbane	
	2006	**2011**	**2006**	**2011**	**2006**	**2011**	**2006**	**2011**
Total Persons Employed	218,369	231,647	61,733	67,959	29,259	32,665	488,611	540,387
Redland Local Employment	181,800	184,581	32,074	35,575	22,283	23,174	576,514	632,014
Self-sufficiency	83.3%	79.7%	52.0%	52.3%	76.2%	70.9%	118.0%	117.0%

Source : ABS; SGS Economics & Planning; Urbis

Previous studies have shown that employment self-sufficiency was 46.5% in 1996 and 50% in 2001, thereby showing a steady improvement over time for the Redland Local Government Area. 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. Redlands is also the only local government in SEQ that improved in employment self-sufficiency between 2006 and 2011.

Table 5.9 below provides a comparison of employment by industry of Redland City's resident population with the number of jobs actually located in the City.

Self-Sufficiency of Employment by Industry

REDLAND CITY, 2006 - 2011 TABLE 5.9

Industry of Employment	Resident Workforce[1] 2006	Resident Workforce[1] 2011	Local Job Stock[2] 2006	Local Job Stock[2] 2011	Net Shortfall of Local Jobs[3] 2006	Net Shortfall of Local Jobs[3] 2011
Health Care & Social Assistance	6,142	7,946	3,832	5,067	2,303	2,879
Retail Trade	7,729	7,723	5,507	5,689	2,218	2,034
Construction	6,528	7,507	2,661	2,998	3,902	4,509
Manufacturing	7,606	7,201	3,001	3,149	4,601	4,052
Education & Training	4,024	4,858	3,158	3,569	868	1,289
Professional, Scientific & Technical Services	3,321	4,281	1,393	1,958	1,768	2,323
Transport, Postal & Warehousing	3,569	4,000	1,000	1,109	2,588	2,891
Public Administration & Safety	3,567	3,997	1,486	1,507	2,066	2,490
Accommodation & Food Services	3,264	3,618	2,469	2,914	781	704
Wholesale Trade	3,451	3,381	1,483	1,284	1,974	2,097
Other Services	2,617	2,925	1,447	1,641	1,164	1,284
Administrative & Support Services	2,091	2,259	1,179	1,140	1,111	1,119
Financial & Insurance Services	1,876	1,946	609	669	1,250	1,277
Rental, Hiring & Real Estate Services	1,269	1,154	881	755	409	399
Information Media & Telecommunications	926	927	387	466	511	461
Inadequately described	1,594	913	373	368	1,192	545
Electricity, Gas, Water & Waste Services	561	803	210	281	339	522
Mining	464	776	224	255	236	521
Arts & Recreational Services	668	761	400	443	270	318
Agriculture, Forestry & Fishing	464	393	374	313	59	80
Total[4]	**61,731**	**67,369**	**32,074**	**35,575**	**29,610**	**31,794**
Total Proportion to Workforce			**52%**	**53%**	**48%**	**47%**

1 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.

2. 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.

3. 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.

4. 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; SGS Economics & Planning; Urbis

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 5.9, the industries with a relatively high net shortfall of local jobs include:

- Construction
- Manufacturing
- Transport, Postal and Warehousing
- Health Care and Social Assistance
- Public Administration and Safety

Overall, Redland City has seen a 7% increase in the net shortfall of local jobs. The industry with the largest increase in net shortfall in percentage terms is Mining, which saw a 117% increase in net shortfall. Information Media and Telecommunications saw the largest percentage decrease in net shortfall, decreasing by 14% from 2006.

5.5 HERFINDAHL INDEX

The Herfindahl Index is typically used as a measure of competition within a market, but in this case it has been used in the same way to show the diversity of an economy's employment.

It is defined as the sum of the squares of the market shares of the industries (1 digit). The result is proportional to the average market share of employment, weighted by market share. As such, it can range from 0 to 100, moving from a large number of very small industries to a single monopolistic industry. A higher result for the Index indicates a decrease in diversity.

Table 5.10 outlines the Herfindahl Index for the local government areas that make up South East Queensland.

Diversity Indices

REDLAND CITY AND SEQ, 2001-2011 TABLE 5.10

Local Government Area	Herfindahl Index 2006	Herfindahl Index 2011	Rank 2006	Rank 2011
Brisbane	7.3	7.7	1	1
Gold Coast	8.0	8.1	2	2
Scenic Rim	8.4	8.3	4	3
Sunshine Coast	8.3	8.7	3	4
Logan	9.2	9.1	7	5
Redland	**8.7**	**9.1**	**5**	**6**
Moreton Bay	8.9	9.2	6	7
Lockyer Valley	10.3	9.4	9	8
Somerset	9.4	9.7	8	9
Ipswich	10.4	9.8	10	10

Source : ABS; SGS Economics & Planning; Urbis

Given this, the following observations can be made:

- Brisbane has the most diverse employment by industry of all the LGAs, followed by the Gold Coast. This is to be expected of urban areas with various employment generators

- Areas with larger rural lands such as Lockyer Valley, Somerset and Ipswich are typically less diverse, with more concentrated sources of employment

- Six out of the ten LGAs became less diverse over the period between 2006 and 2011, including all of the coastal LGAs. It should be noted that a number of Local Government amalgamations have improved the diversity of other local councils.

- Redland saw a decline in employment diversity, falling from a rank from 5th to 6th as it was slightly outpaced by Logan. Redland therefore has moderate employment diversity compared to the other SEQ LGAs, though has seen a higher concentration of industries in recent time.

6 Future Role and Function Opportunities

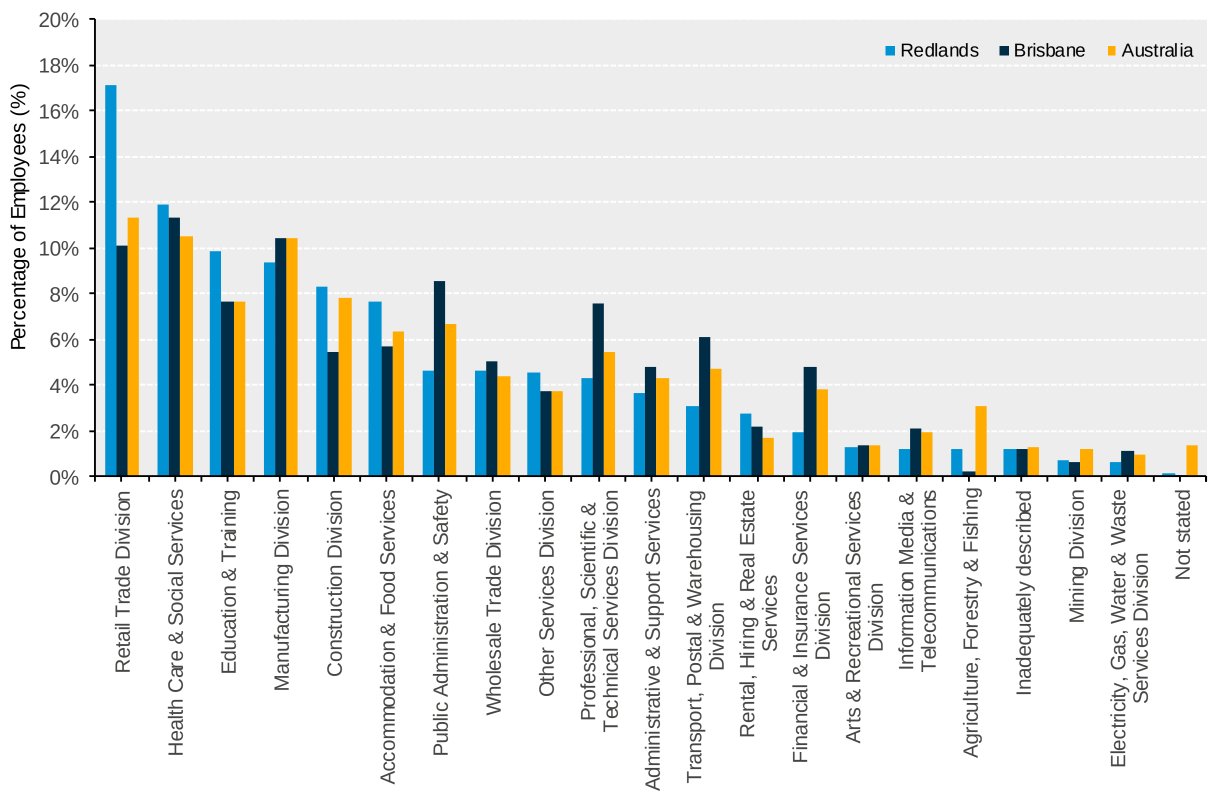
The penultimate chapter of this study examines the future role and function opportunities for the two Principal Regional Activity Centres in Redland City (Cleveland, Capalaba), the Major Regional Activity Centre (Victoria Point), and for Redland City. It does this through an examination of the centre and regional functional strengths, employment growth trends, and through the application of an Industry Opportunity Matrix.

6.1 INDUSTRY STRENGTH

Chart 7.1 compares the industry profile of Redland City to that of South East Queensland, and Queensland overall, highlighting Redland City's relative industry strengths. The three largest industries of Retail Trade, Health & Social Assistance, and Education & Training, also represent the industries with the greatest relative strength as indicated by the Employment Quotient assessment.

Industry Proportion

REDLANDS, BRISBANE AND AUSTRALIA, 2006 CHART 6.1



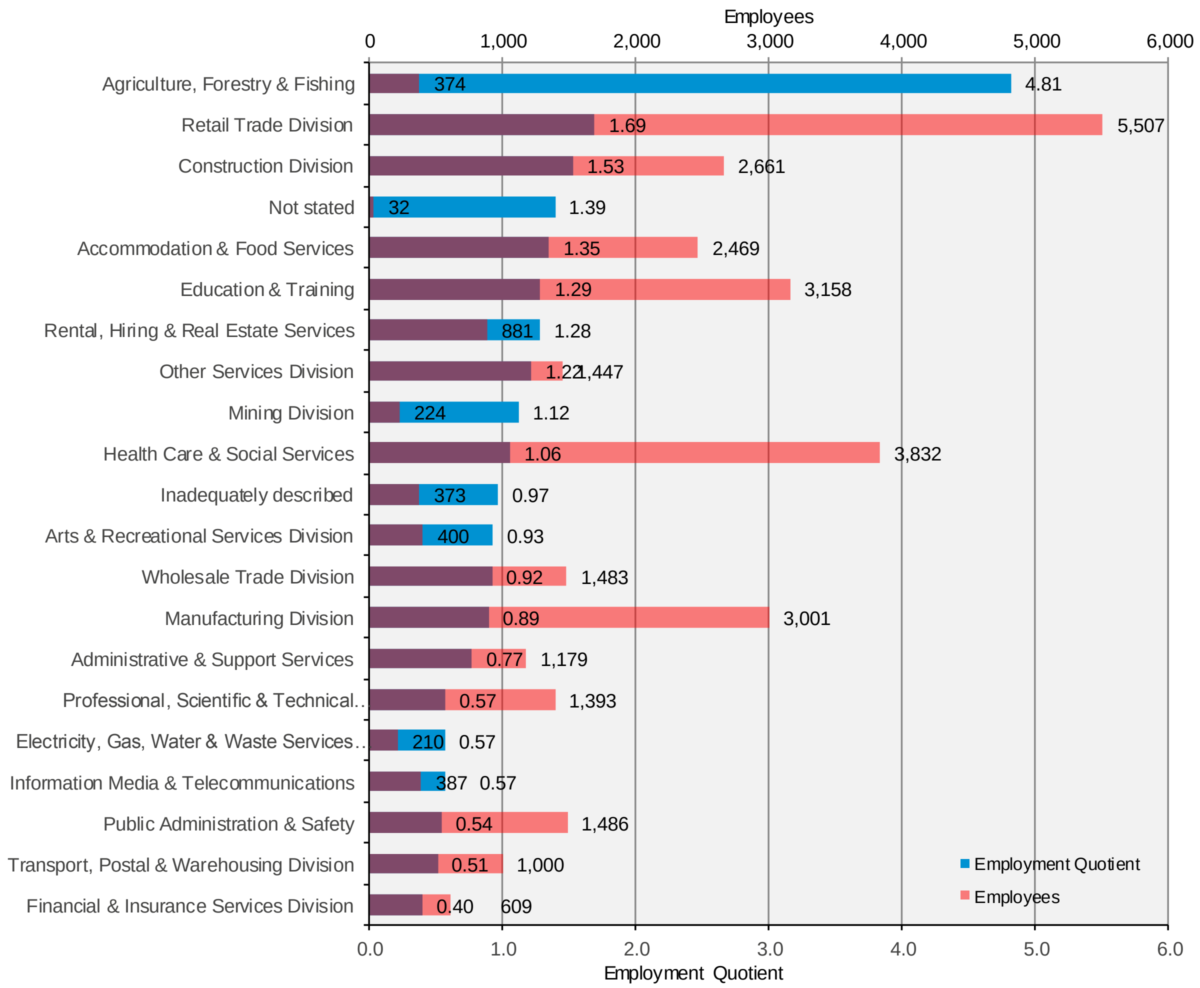
Source : ABS Census : Urbis

Employment Quotients measure the relative strength of an industry in a sub-region in the context of the overall region. It divides the proportion that one industry represents of the entire sub-regional employment base by the proportion that the same industry represents of the entire regional employment base. For example, Retail Trade represents 16% of employment in Redland City and only 11% of employment in South East Queensland. 16/11 equals 1.5 which is a strong employment quotient and indicates that the Retail industry is more significant in Redland City than it is in South East Queensland overall.

Employment Quotients[1] and Associated Employee Numbers

REDLANDS AND BRISBANE, 2006

CHART 6.2



1 An employment quotient represents how strongly an area is represented in an industry compared with the larger region

2. In this analysis the study area incorporates the Caloundra South SLA and compares it to the Sunshine Coast Sub Region (Coolum-Mudjimba, Nambour, Paynter-Petrie Creek, Maroochydore, Mooloolaba, Kawana, Caloundra North, Glass House Country)

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

The chart above shows the comparative strength of Retail Trade (1.5), Health Care and Social Assistance (1.2) and Education and Training (1.27) within Redland City. This reaffirms the comparative strengths of Redland within these industries and highlights the potential to capitalise on these industries.

6.2 GROWTH BY CENTRE

To determine the level of recent demand for employment land by location we have reviewed the latest growth figures against the forecast growth for Redland City by small area level.

Employment Change By SA2

REDLAND CITY AREAS — TABLE 6.1

SA2	Actual 2006 No.	Actual 2011 No.	Actual 2006-11 Growth No.	Actual 2006-11 Growth %	Forecast Growth 2006-31 No.	Forecast Growth 2006-31 No.	5 Year Take-up of Forecast Growth % of Forecast Emp Demanded
Alexandra Hills	2,415	2,169	-246	-10%	3,317	902	-27%
Birkdale	1,743	1,890	147	8%	2,712	969	15%
Capalaba	8,033	9,517	1,484	18%	13,021	4,988	30%
Thorneside	382	310	-72	-19%	522	140	-51%
Wellington Point	1,379	1,548	169	12%	2,162	783	22%
Cleveland	8,231	8,744	513	6%	12,726	4,495	11%
Ormiston	1,088	1,119	31	3%	1,671	583	5%
Redland Bay	1,417	1,725	308	22%	2,717	1,300	24%
Redland Islands	1,308	1,541	233	18%	2,187	879	27%
Sheldon - Mount Cotton	1,342	1,583	241	18%	1,828	486	50%
Thornlands	1,810	1,733	-77	-4%	2,351	541	-14%
Victoria Point	2,945	3,714	769	26%	4,794	1,849	42%
Redland Total	**32,095**	**35,593**	**3,498**	**11%**	**50,008**	**17,913**	**20%**

Source: Census of Population and housing 2006 and 2011; Urbis

- Total employment within Redland City has grown by 3,498 workers or 11% between 2006 and 2011 with the majority of this growth centred at Capalaba (1,484 workers), Victoria Point (769 workers) and Cleveland (513 workers).
- Alexandra Hills (246 workers), Thornlands (77 workers) and Thorneside (382 workers) experienced declines in employment.
- The last column in Table 6.1 shows the jobs growth between 2006 and 2011 divided by the forecast jobs growth between 2006 and 2031. Effectively this is indicating where the jobs growth has been trending by area and highlights the potential areas that may require revision under the new planning scheme.
- Over the last 5 years, Sheldon-Mt Cotton (50%), Victoria Point (42%), Capalaba (30%), Redland Islands (27%), Redland Bay (24%) and Wellington Point (22%) have all experienced more than 20% of their forecast 25 year jobs growth. As the last five years has represented 20% of the forecast period, we can ascertain that these areas have been growing faster than expected under the Strategy.
- The implication for the RPS revision is that further analysis is required to understand the land supply by type in each of these sub-markets going forward.

Given the Principal Regional Activity Centre status of Cleveland and Capalaba and the recent growth experienced within Victoria Point we have assessed in detail what the major growth industries have been and what the role and function of these centres should be going forward.

6.2.1 CAPALABA

Principal Regional Activity Centres (PRACs) are designated in the South East Queensland Regional Plan 2009-2031. These activity centres serve catchments of regional significance and accommodate key employment concentrations. They also serve business, major comparison and convenience retail, and service uses. These centres provide a secondary administrative focus, accommodating regional offices of health, education, cultural and entertainment facilities that have governmental and regional significance. Both Cleveland and Capalaba are considered to be Principal Regional Activity Centres by the South East Queensland Regional Plan, though they both serve different but complementary functions.

Employment by Industry

CAPALABA, 2006-2011 TABLE 6.2

Industry	Capalaba 2006 No.	Capalaba 2011 No.	Capalaba 2011 %	Capalaba Growth No.	Redland 2011 %	Quotient 2011
Retail Trade	2,366	2,536	*26.7%*	*170*	16.0%	↑ 1.7
Manufacturing	891	1,150	*12.1%*	*259*	8.9%	↑ 1.4
Construction	691	953	*10.0%*	*262*	8.4%	↑ 1.2
Accommodation & Food Services	473	614	*6.5%*	*141*	8.2%	↓ 0.8
Wholesale Trade	589	609	*6.4%*	*20*	3.6%	↑ 1.8
Health Care & Social Assistance	455	605	*6.4%*	*150*	14.2%	↓ 0.4
Other Services	470	551	*5.8%*	*81*	4.6%	↑ 1.3
Professional, Scientific & Technical Services	252	445	*4.7%*	*193*	5.5%	↓ 0.8
Transport, Postal & Warehousing	309	397	*4.2%*	*88*	3.1%	↑ 1.3
Education & Training	347	342	*3.6%*	*-5*	10.0%	↓ 0.4
Administrative & Support Services	269	312	*3.3%*	*43*	3.2%	⇨ 1.0
Public Administration & Safety	241	245	*2.6%*	*4*	4.2%	↓ 0.6
Financial & Insurance Services	201	221	*2.3%*	*20*	1.9%	↑ 1.2
Rental, Hiring & Real Estate Services	188	145	*1.5%*	*-43*	2.1%	↓ 0.7
Information Media & Telecommunications	102	128	*1.3%*	*26*	1.3%	⇨ 1.0
Inadequately Described	80	104	*1.1%*	*24*	1.0%	⇨ 1.1
Arts & Recreational Services	77	87	*0.9%*	*10*	1.2%	↓ 0.7
Electricity, Gas, Water & Waste Services	19	28	*0.3%*	*9*	0.8%	↓ 0.4
Agriculture, Forestry & Fishing	21	22	*0.2%*	*1*	0.9%	↓ 0.3
Mining	6	20	*0.2%*	*14*	0.7%	↓ 0.3
Total	**8,047**	**9,514**	*100%*	***1,467***	100%	⇨ 1.0

1 Forecasts for Property and Business Services under the 2010 Strategy have been split between 3 industry sectors as a pro rata share
Source: Census of Population and housing 2006 and 2011; Urbis

Capalaba is a predominately retail and commercial destination, as well as being the Redland SA2 with the highest total number of employees. Given this function, Capalaba has a very high proportion of Retail Trade (26.7%) and Manufacturing (12.1%) employment (refer Table 6.2).

Secondary industries include Medical (Health Care & Social Assistance), Office (Professional, Scientific & Technical Service, Administrative & Support Services), Education (Education & Training), and Administration (Public Administration and Safety), which jointly equate to 20.6% of the Capalaba employment. Capalaba has low levels of Cultural/Entertainment (Arts & Recreational Services) employment, at only 0.9% of employees.

Top 30 Growth Industries by 4 Digit ANZSIC

CAPALABA | TABLE 6.3

Industry	2006	2011	2006-2011 Growth No.	2006-2011 Growth %	Land Use
Electrical Services	84	209	125	149%	Industrial
Manufacturing, nfd	104	219	115	n.a	Industrial
Urban Bus Transport (Including Tramway)	25	135	110	440%	Industrial
Takeaway Food Services	337	430	93	28%	Retail
Computer System Design and Related Services	0	73	73	n.a	Industrial
Other Social Assistance Services	50	122	72	144%	Community
Plumbing Services	29	99	70	241%	Industrial
Labour Supply Services	17	80	63	371%	Industrial
Hardware and Building Supplies Retailing	178	235	57	32%	Retail
Cafes and Restaurants	71	122	51	72%	Retail
Electrical, Electronic and Gas Appliance Retailing	142	191	49	35%	Retail
Domestic Appliance Repair and Maintenance	3	46	43	1433%	Industrial
Bread Manufacturing (Factory based)	85	127	42	49%	Industrial
Sport and Camping Equipment Retailing	24	65	41	171%	Retail
Accounting Services	78	119	41	53%	Commercial
Engineering Design and Engineering Consulting Services	24	58	34	142%	Commercial
Pharmaceutical, Cosmetic and Toiletry Goods Retailing	88	116	28	32%	Retail
Road Freight Transport	77	104	27	35%	Industrial
Child Care Services	96	120	24	25%	Community
Footwear Retailing	11	34	23	209%	Retail
Other Fabricated Metal Product Manufacturing nec	3	23	20	667%	Industrial
State Government Administration	17	36	19	112%	Commercial
Other Converted Paper Product Manufacturing	0	19	19	n.a	Industrial
Other Goods Wholesaling nec	7	26	19	271%	Industrial
Iron Smelting and Steel Manufacturing	10	29	19	190%	Industrial
Combined Primary and Secondary Education	83	102	19	23%	Community
Computer and Computer Peripheral Wholesaling	7	25	18	257%	Industrial
General Insurance	14	32	18	129%	Commercial
Paper Product Wholesaling	23	40	17	74%	Industrial
Other Allied Health Services	22	38	16	73%	Community
Capalaba Total	**8,057**	**9,519**	**1,462**	**18%**	

Land Demand	Jobs Growth	Jobs/Ha	Ha Demanded
Retail	342	166	2.1
Industrial	780	33	23.3
Commercial	112	1,000	0.1
Community	131	60	2.2

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

We can see from Table 6.3 above, the significance of industrial employment growth over the last 5 years within Capalaba. By using a mixed industry benchmark of 33 employees per hectare of floorspace, it can be seen that approximately 23 hectares of industrial land was taken up, whilst 2.1 hectares of retail and 2.2 of community land was demanded over the last 5 years. It should be noted that this is a reflection of growth within the top 30 growth industries only and does not account for negative growth experienced within other land uses.

Of the 1,365 jobs created within the top 30 industries within Capalaba, 57% were related to an industrial industry, 25% to retail industries, 8% to commercial industries and 10% to community uses.

The recent high growth experienced within the industrial sectors in Capalaba further enhances the potential opportunity within Birkdale. The growth shows the markets appetite to locate at Capalaba and the potential Birkdale precinct may consolidate the area as an industrial node.

In addition, increasing efficiency of development within the existing industrial precincts through increased site cover gives the ability to consolidate development.

Top 30 Industries in decline by 4 Digit ANZSIC

CAPALABA SA2 TABLE 6.4

Industry	2006	2011	2006-2011 Growth No.	2006-2011 Growth %
Furniture Retailing	159	99	-60	-38%
Interurban and Rural Bus Transport	58	0	-58	-100%
Printing	70	34	-36	-51%
Administrative and Support Services, nfd	35	0	-35	-100%
Heavy Machinery and Scaffolding Rental and Hiring	45	12	-33	-73%
Other Specialised Food Retailing	95	69	-26	-27%
Site Preparation Services	63	43	-20	-32%
Other Agricultural Product Wholesaling	70	52	-18	-26%
Industrial and Agricultural Chemical Product Wholesaling	24	7	-17	-71%
Other Manufacturing nec	22	5	-17	-77%
Wooden Structural Fitting and Component Manufacturing	92	76	-16	-17%
Investigation and Security Services	35	20	-15	-43%
Timber Wholesaling	30	15	-15	-50%
Cake and Pastry Manufacturing (Factory based)	40	26	-14	-35%
Glazing Services	24	10	-14	-58%
Education and Training, nfd	19	6	-13	-68%
Other Grocery Wholesaling	53	40	-13	-25%
Newspaper and Book Retailing	40	27	-13	-33%
Photographic Film Processing	13	0	-13	-100%
Pubs, Taverns and Bars	27	14	-13	-48%
Other Hardware Goods Wholesaling	49	37	-12	-24%
Textile Finishing and Other Textile Product Manufacturing	21	10	-11	-52%
Video and Other Electronic Media Rental and Hiring	18	7	-11	-61%
Cut and Sewn Textile Product Manufacturing	36	26	-10	-28%
Employment Placement and Recruitment Services	55	45	-10	-18%
Not stated	10	0	-10	-100%
Motor Vehicle Parts Retailing	56	47	-9	-16%
Residential Property Operators	17	8	-9	-53%
Finance, nfd	12	4	-8	-67%
Concrete Product Manufacturing	8	0	-8	-100%
Capalaba Total	**8,057**	**9,519**	**1,462**	**18%**

Source: Census of Population and housing 2006 and 2011; Urbis

It should be noted that some decline and growth within four digit industries may be due to re-classification between years. For example Interurban and Rural Bus Transport declined from 58 employees in 2006 to 0 in 2011 whereas Urban Bus Transport (including Tramway) increased by over 110 employees over the same period. It would be reasonable to assume that some of this employment growth and decline can be attributed by a reclassification of industries.

FACTOR/MEASURE	2010 STRATEGY	2012 REVIEW	CHANGE/RESPONSE/COMMENTS
Capalaba	▪ 2,481 new in-centre jobs between 2006-2031 ▪ 82,500 sq.m of additional in-centre commercial and retail floorspace (at an average of 33sq.m per employee) ▪ 13,500 sq.m of out-of centre retail and commercial floorspace ▪ Continuation of large format retail and commercial activities adjacent to the Major Centre Zone	▪ 456 new employees within the centre (assumes Public Admin and Safety, Retail Trade, Professional, Scientific and technical services, Admin and Support Services, Financial and Insurance Services, Information Media and Telecommunication ▪ 15,000 sq.m with new employment assuming 33sq.m per employee	▪ Continue to monitor in-centre development, currently in-centre growth is tracking in-line with 2010 strategy. ▪ Last five years approximately 15.7% of the future 96,000 sq.m in-centre and out-of centre retail and commercial floorspace has been taken up.

6.2.2 CLEVELAND

Cleveland is primarily positioned as the administrative hub of Redland, and is home to 7.4 employees per hectare, which is the highest of the Redland SA2's. Cleveland has high proportions of Medical (Health Care & Social Assistance), Administration (Public Administration and Safety) and Retail (Retail Trade) employees. Collectively, these industries represent 43.9% of employment.

Employment within Office (Professional, Scientific and Technical Service, Administrative and Support Services) and Education (Education and Training) has experienced recent growth within the Cleveland SA2. With the Cleveland CBD's PRAC classification there may be potential to further strengthen these industries.

Employment by Industry

CLEVELAND, 2006-2011 TABLE 6.5

Industry	Cleveland 2006 No.	Cleveland 2011 No.	Cleveland 2011 %	Growth	Redland 2011 %	Quotient 2011
Health Care & Social Assistance	1,460	1,967	*22.5%*	*507*	14.2%	↑ 1.6
Public Administration & Safety	930	950	*10.9%*	*20*	4.2%	↑ 2.6
Manufacturing	1,122	916	*10.5%*	*-206*	8.9%	↑ 1.2
Retail Trade	989	907	*10.4%*	*-82*	16.0%	↓ 0.6
Accommodation & Food Services	718	760	*8.7%*	*42*	8.2%	⇨ 1.1
Professional, Scientific & Technical Services	382	484	*5.5%*	*102*	5.5%	⇨ 1.0
Construction	298	446	*5.1%*	*148*	8.4%	↓ 0.6
Other Services	357	392	*4.5%*	*35*	4.6%	⇨ 1.0
Education & Training	315	360	*4.1%*	*45*	10.0%	↓ 0.4
Wholesale Trade	348	243	*2.8%*	*-105*	3.6%	↓ 0.8
Transport, Postal & Warehousing	211	237	*2.7%*	*26*	3.1%	↓ 0.9
Rental, Hiring & Real Estate Services	235	219	*2.5%*	*-16*	2.1%	↑ 1.2
Administrative & Support Services	236	201	*2.3%*	*-35*	3.2%	↓ 0.7
Financial & Insurance Services	212	186	*2.1%*	*-26*	1.9%	↑ 1.1
Electricity, Gas, Water & Waste Services	114	170	*1.9%*	*56*	0.8%	↑ 2.5
Arts & Recreational Services	91	116	*1.3%*	*25*	1.2%	⇨ 1.1
Information Media & Telecommunications	104	83	*0.9%*	*-21*	1.3%	↓ 0.7
Inadequately Described	65	75	*0.9%*	*10*	1.0%	↓ 0.8
Agriculture, Forestry & Fishing	17	18	*0.2%*	*1*	0.9%	↓ 0.2
Mining	10	9	*0.1%*	*-1*	0.7%	↓ 0.1
Total	**8,214**	**8,739**	*100%*	***525***	100%	⇨ 1.0

1 Forecasts for Property and Business Services under the 2010 Strategy have been split between 3 industry sectors as a pro rata share

Source: Census of Population and housing 2006 and 2011; Urbis

Given that the Cleveland statistical area contains the Redland Mater Private Hospital it is obvious that the industry with the highest number of employees is Health Care and Social Assistance. The Health Care and Social Assistance industry in Cleveland has increased by around 500 employees over the five year period between 2006 and 2011 and now comprises around 1,970 people. This represents around 22.5% of the working population in Cleveland (refer Table 7.5).

Secondary industries in Cleveland include Administration (Public Administration and Safety), Manufacturing and Retail Trade which together, comprise to approximately 31.5% of the total employees within Cleveland.

Top 30 Growth Industries by 4 Digit ANZSIC

CLEVELAND SA2 | TABLE 6.6

Industry	2006	2011	2006-2011 Growth No.	2006-2011 Growth %	Land Use
Hospitals (except Psychiatric Hospitals)	736	1,124	388	53%	Community
Computer System Design and Related Services	0	85	85	n.a.	Commercial
Poultry Processing	226	289	63	28%	Industrial
Takeaway Food Services	192	235	43	22%	Retail
Child Care Services	45	76	31	69%	Community
Accounting Services	70	99	29	41%	Commercial
House Construction	84	111	27	32%	Industrial
Aged Care Residential Services	106	132	26	25%	Community
Mining and Construction Machinery Manufacturing	9	35	26	289%	Industrial
Other Social Assistance Services	101	126	25	25%	Community
Management Advice and Related Consulting Services	47	72	25	53%	Commercial
Other Allied Health Services	67	90	23	34%	Community
Electrical Services	29	52	23	79%	Industrial
Waste Treatment and Disposal Services	35	57	22	63%	Industrial
Other Auxiliary Finance and Investment Services	39	61	22	56%	Commercial
Clubs (Hospitality)	51	73	22	43%	Community
Health Care and Social Assistance, nfd	31	53	22	71%	Community
Employment Placement and Recruitment Services	16	38	22	138%	Commercial
Combined Primary and Secondary Education	0	19	19	n.a.	Community
Solid Waste Collection Services	7	24	17	243%	Industrial
Hairdressing and Beauty Services	103	120	17	17%	Retail
Other Specialised Design Services	9	25	16	178%	Commercial
Building and Other Industrial Cleaning Services	61	77	16	26%	Industrial
State Government Administration	89	103	14	16%	Commercial
Road and Bridge Construction	5	19	14	280%	Industrial
Primary Education	76	90	14	18%	Community
Pathology and Diagnostic Imaging Services	35	48	13	37%	Commercial
Other Personal Services nec	35	48	13	37%	Commercial
Taxi and Other Road Transport	7	20	13	186%	Industrial
Cake and Pastry Manufacturing (Factory based)	5	18	13	260%	Industrial
Cleveland Total	**8,221**	**8,746**	**525**	**6%**	

Land Demand	Jobs Growth	Jobs Per Ha	Ha Demanded
Retail	60	166	0.4
Industrial	234	33	7.0
Commercial	239	1,000	0.2
Community	570	60	9.5

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Table 6.6 outlines the clear importance on employment within the Health Care and Social Assistance industry in Cleveland with the industry employing the largest number of employees within the statistical area. On a more detailed level, over the last five year period, employment within Hospitals in Cleveland has increased by around 390 people or approximately 53% largely due to the expansion and refurbishment of the day unit facilities at the Mater Redland Hospital in 2007. This number is expected to increase further in the next five year period due to the expansion of the children's health services department at the Redland Hospital.

Using the industry benchmarks that were applied to Capalaba, over the last 5 year period approximately 7 hectares of industrial land was taken up, whilst 9.5 hectares of community land, 0.4 hectares of retail land and 0.2 hectares of commercial land was demanded.

Approximately 1,100 jobs were created within the top 30 industries in Cleveland. Of these 51% were related to community uses, 22% to commercial and industrial uses and 5% to retail uses.

Top 30 Industries in decline by 4 Digit ANZSIC

CLEVELAND SA2 TABLE 6.7

Industry	2006	2011	2006-2011 Growth No.	2006-2011 Growth %
Whiteware Appliance Manufacturing	236	63	-173	-73%
Other Electrical and Electronic Goods Wholesaling	187	67	-120	-64%
Scientific Research Services	72	21	-51	-71%
Polymer Film and Sheet Packaging Material Manufacturing	44	0	-44	-100%
Administrative and Support Services, nfd	39	0	-39	-100%
Medical and Other Health Care Services, nfd	56	19	-37	-66%
Wooden Structural Fitting and Component Manufacturing	45	15	-30	-67%
Hardware and Building Supplies Retailing	45	18	-27	-60%
Supermarket and Grocery Stores	279	252	-27	-10%
Iron Smelting and Steel Manufacturing	51	25	-26	-51%
Newspaper Publishing	78	53	-25	-32%
Electric Lighting Equipment Manufacturing	73	50	-23	-32%
Local Government Administration	683	660	-23	-3%
Machinery and Equipment Manufacturing, nfd	37	16	-21	-57%
General Practice Medical Services	111	90	-21	-19%
Labour Supply Services	41	22	-19	-46%
Engineering Design and Engineering Consulting Services	44	25	-19	-43%
Other Electrical Equipment Manufacturing	22	3	-19	-86%
Electrical, Electronic and Gas Appliance Retailing	44	27	-17	-39%
Other Fabricated Metal Product Manufacturing nec	33	16	-17	-52%
Food and Beverage Services, nfd	20	5	-15	-75%
Clothing Manufacturing	18	3	-15	-83%
Finance, nfd	26	12	-14	-54%
Travel Agency and Tour Arrangement Services	26	12	-14	-54%
Furniture Retailing	28	15	-13	-46%
Real Estate Services	162	149	-13	-8%
Other Administrative Services nec	12	0	-12	-100%
Industrial and Agricultural Chemical Product Wholesaling	15	4	-11	-73%
Wooden Furniture and Upholstered Seat Manufacturing	21	11	-10	-48%
Surveying and Mapping Services	14	4	-10	-71%
Cleveland Total	**8,221**	**8,746**	**525**	**6%**

Source: Census of Population and housing 2006 and 2011; Urbis

Table 6.7 outlines the top 30 industries that experienced a decline in employment between 2006 and 2011. Of these industries, the greatest loss was within the Whiteware, Appliance and Manufacturing industry and Other Electrical and Electronic Goods Wholesaling industry, declining by 170 jobs and 120 jobs respectively. It is important to note that this decline was due to the closure of the Fisher and Paykel manufacturing plant in 2008.

FACTOR/MEASURE	2010 STRATEGY	2012 REVIEW	CHANGE/RESPONSE/COMMENTS
Cleveland	▪ 2,481 new in-centre jobs between 2006-2031 ▪ 82,000 sq.m of additional in-centre commercial and retail floorspace (@ an average of 33sq.m per employee) ▪ 523 new out of centre commercial and retail jobs growth between 2006 and 2031. ▪ 15,000 sq.m of out-of centre retail and commercial floorspace ▪ Continuation of large format retail and commercial activities adjacent to the Major Centre Zone	▪ -42 new employees within the centre (assumes Public Admin and Safety, Retail Trade, Professional, Scientific and technical services, Admin and Support Services, Financial and Insurance Services, Information Media and Telecommunication)	▪ Continue to monitor centre development, recently centre growth has experienced negative growth over the last 5 years. ▪ It should be noted that the Global Financial Crisis has impacted the Cleveland CBD significantly. In addition we believe that the retail within Cleveland lacks consolidation (i.e. the major shopping centre is isolated and does not help drive main street retail) and there is generally a lack of retail diversity. ▪ Continue to monitor out of centre development and the potential impact this may have on consolidation of CBD areas. Undertake a detailed analysis of employment movement by detailed destination zone. This will identify the growth by industry by specific geographic area (i.e. helps to identify out of centre development).

6.2.3 VICTORIA POINT

While Victoria Point is not designated as an activity centre in the South East Queensland Regional Plan, it can be considered a high growth area compared to the other SA2s. Overall, Victoria Point has seen employment growth of 26.2% between 2006 and 2011; a rate higher than both Cleveland and Capalaba.

This has largely been driven by Retail Trade, Health Care & Social Assistance, Accommodation & Food Services, and Education & Training. Collectively, these industries have employed 550 new residents out of the 771 new employees for the SA2 between 2006 and 2011; representing 71% of total employment growth.

Employment by Industry

VICTORIA POINT, 2006-2011 TABLE 6.8

Industry	Victoria Point 2006 No.	Victoria Point 2011 No.	Victoria Point 2011 %	Growth	Redland 2011 %	Quotient 2011
Retail Trade	801	933	*25.1%*	*132*	16.0%	⇧ 1.6
Health Care & Social Assistance	402	564	*15.2%*	*162*	14.2%	⇨ 1.1
Accommodation & Food Services	345	516	*13.9%*	*171*	8.2%	⇧ 1.7
Education & Training	356	441	*11.9%*	*85*	10.0%	⇧ 1.2
Construction	193	189	*5.1%*	*-4*	8.4%	⇩ 0.6
Administrative & Support Services	112	175	*4.7%*	*63*	3.2%	⇧ 1.5
Professional, Scientific & Technical Services	123	169	*4.6%*	*46*	5.5%	⇩ 0.8
Other Services	117	147	*4.0%*	*30*	4.6%	⇩ 0.9
Rental, Hiring & Real Estate Services	88	88	*2.4%*	*0*	2.1%	⇧ 1.1
Financial & Insurance Services	76	88	*2.4%*	*12*	1.9%	⇧ 1.3
Arts & Recreational Services	68	78	*2.1%*	*10*	1.2%	⇧ 1.7
Transport, Postal & Warehousing	51	73	*2.0%*	*22*	3.1%	⇩ 0.6
Information Media & Telecommunications	19	68	*1.8%*	*49*	1.3%	⇧ 1.4
Manufacturing	45	57	*1.5%*	*12*	8.9%	⇩ 0.2
Wholesale Trade	62	45	*1.2%*	*-17*	3.6%	⇩ 0.3
Public Administration & Safety	27	29	*0.8%*	*2*	4.2%	⇩ 0.2
Electricity, Gas, Water & Waste Services	13	18	*0.5%*	*5*	0.8%	⇩ 0.6
Inadequately Described	30	17	*0.5%*	*-13*	1.0%	⇩ 0.4
Agriculture, Forestry & Fishing	12	16	*0.4%*	*4*	0.9%	⇩ 0.5
Mining	3	3	*0.1%*	*0*	0.7%	⇩ 0.1
Total	**2,943**	**3,714**	*100%*	***771***	100%	⇨ 1.0

1 Forecasts for Property and Business Services under the 2010 Strategy have been split between 3 industry sectors as a pro rata share
Source: Census of Population and housing 2006 and 2011; Urbis

Given the retail facilities at Victoria Point Shopping Centre and in the vicinity of the sub-regional centre, the Victoria Point statistical area is predominately a retail destination with around 25% of all employees in Victoria Point being employed within this industry. This industry experienced an increase of around 130 employees between 2006 and 2011 (refer Table 6.8 above).

Other industries that were strongly represented are Health Care and Social Assistance, Accommodation and Food Services and the Education and Training industry that comprised around 560, 520 and 440 employees respectively. Low levels of employment in Victoria Point are in the Mining, Agriculture, Forestry and Fishing and Electricity, Gas, Water and Waste industries.

Top 30 Growth Industries by 4 Digit ANZSIC

VICTORIA POINT SA2 — TABLE 6.9

Industry	2006	2011	2006-2011 Growth No.	2006-2011 Growth %	Land Use
Takeaway Food Services	171	263	92	54%	Retail
Aged Care Residential Services	193	247	54	28%	Community
Cafes and Restaurants	97	146	49	51%	Retail
Building and Other Industrial Cleaning Services	49	93	44	90%	Industrial
Motion Picture Exhibition	0	42	42	n.a.	Retail
Pharmaceutical, Cosmetic and Toiletry Goods Retailing	37	69	32	86%	Retail
General Practice Medical Services	28	60	32	114%	Commercial
Technical and Vocational Education and Training	0	27	27	n.a.	Commercial
Secondary Education	168	193	25	15%	Community
Combined Primary and Secondary Education	0	25	25	n.a.	Community
Computer System Design and Related Services	0	23	23	n.a.	Commercial
Child Care Services	69	90	21	30%	Community
Other Specialised Food Retailing	24	44	20	83%	Retail
Supermarket and Grocery Stores	279	298	19	7%	Retail
Other Water Transport Support Services	0	16	16	n.a.	Industrial
Hairdressing and Beauty Services	42	58	16	38%	Retail
Hardware and Building Supplies Retailing	68	84	16	24%	Retail
Employment Placement and Recruitment Services	7	21	14	200%	Commercial
Other Social Assistance Services	17	30	13	76%	Commercial
Manchester and Other Textile Goods Retailing	0	13	13	n.a.	Retail
Banking	37	49	12	32%	Commercial
Liquor Retailing	18	30	12	67%	Retail
Accommodation	4	16	12	300%	Community
Gardening Services	13	24	11	85%	Industrial
Fuel Retailing	16	27	11	69%	Retail
Dental Services	17	28	11	65%	Commercial
Physiotherapy Services	0	10	10	n.a.	Commercial
Office Administrative Services	0	10	10	n.a.	Commercial
Accounting Services	17	27	10	59%	Commercial
Electrical, Electronic and Gas Appliance Retailing	12	22	10	83%	Retail
Victoria Point	**2,946**	**3,714**	**768**	**26%**	

Land Demand	Jobs Growth	Jobs Per Ha	Ha Demanded
Retail	332	166	2.0
Industrial	71	33	2.1
Commercial	162	1,000	0.2
Community	137	60	2.3

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Top 30 Industries in decline by 4 Digit ANZSIC

VICTORIA POINT SA2 — TABLE 6.10

Industry	2006	2011	2006-2011 Growth No.	2006-2011 Growth %
Administrative and Support Services, nfd	17	0	-17	-100%
Carpentry Services	21	6	-15	-71%
House Construction	60	48	-12	-20%
Inadequately described	30	18	-12	-40%
Sports and Physical Recreation Clubs and Sports Professionals	29	19	-10	-34%
Architectural Services	8	0	-8	-100%
Fresh Meat, Fish and Poultry Retailing	30	22	-8	-27%
Electrical Services	14	6	-8	-57%
Other Hardware Goods Wholesaling	12	4	-8	-67%
Other Store-Based Retailing nec	41	33	-8	-20%
Finance, nfd	7	0	-7	-100%
Building Construction, nfd	9	3	-6	-67%
Water Passenger Transport	6	0	-6	-100%
Other Personal Accessory Retailing	11	5	-6	-55%
Manufacturing, nfd	8	3	-5	-63%
Electronic (except Domestic Appliance) and Precision Equipment I	10	5	-5	-50%
Furniture Retailing	5	0	-5	-100%
Other Machinery and Equipment Repair and Maintenance	5	0	-5	-100%
Video and Other Electronic Media Rental and Hiring	13	8	-5	-38%
Toy and Game Retailing	5	0	-5	-100%
Food Retailing, nfd	4	0	-4	-100%
Advertising Services	8	4	-4	-50%
Fruit and Vegetable Wholesaling	4	0	-4	-100%
Investigation and Security Services	10	6	-4	-40%
Landscape Construction Services	12	8	-4	-33%
Industrial and Agricultural Chemical Product Wholesaling	4	0	-4	-100%
Social Assistance Services, nfd	9	5	-4	-44%
Other Administrative Services nec	8	4	-4	-50%
Newspaper Publishing	4	0	-4	-100%
Petroleum Product Wholesaling	4	0	-4	-100%
Victoria Point Total	**2,946**	**3,714**	**768**	**26%**

Source: Census of Population and housing 2006 and 2011; Urbis

6.3 INDUSTRY OPPORTUNITIES

This review of the Redland City Employment Strategy has provided a number of useful insights to strengthen the Strategy, particularly in relation to assessing industry opportunities. The Urbis Industry Opportunity Matrix has been applied at the one digit ANZSIC code level to inform industry strategy for Redland City. This matrix applies measures of Economic Growth (Gross Regional Product per employee estimates), and Employment Strength (employment growth over the past five years) to plot industry positions on the matrix.

The following table shows the recent employment growth experienced by each industry as well as the average GRP contribution per employee. The GRP contribution per employee has been calculated from analysis of South East Queensland.

GRP Contribution and Employment Growth

REDLAND CITY COUNCIL, 1 DIGIT ANZSIC CODE — TABLE 6.11

Industry	GRP Contribution Per Employee [1]	Employment Growth 2006-2011 [2]
Health Care & Social Assistance	$70,012	1,235
Professional, Scientific & Technical Services	$67,953	565
Accommodation & Food Services	$62,565	445
Education & Training	$61,722	411
Construction	$74,735	337
Other Services	$51,959	194
Retail Trade	$51,159	182
Manufacturing	$90,329	148
Transport, Postal and Warehousing	$83,497	109
Information Media & Telecommunications	$154,826	79
Electricity, Gas, Water & Waste Services	$179,511	71
Financial & Insurance Services	$182,582	60
Arts & Recreational Services	$46,241	43
Mining	$588,395	31
Public Administration & Safety	$77,805	21
Administrative & Support Services	$54,663	-39
Agriculture, Forestry & Fishing	$116,267	-61
Rental, Hiring & Real Estate Services	$88,614	-126
Wholesale Trade	$111,250	-199

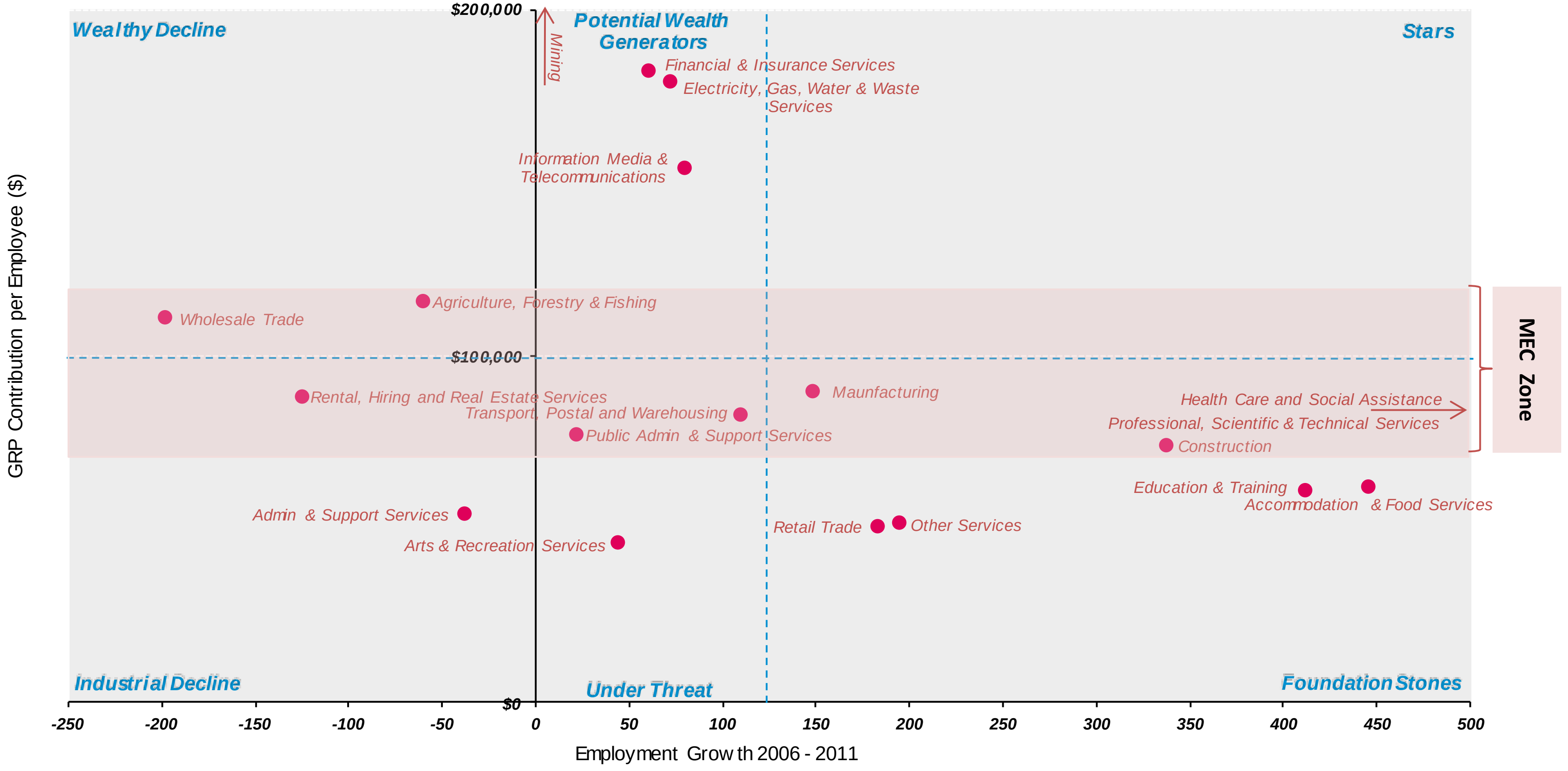
1 Urbis adjusted SEQ benchmarks
2. Derived from 2006 and 2011 ABS Censuses
Source : ABS 2006 and 2011 Censuses ; Urbis

Plotting these two measures for each Industry in Redland City generates the following industry opportunity matrix illustrated in Chart 6.3 overleaf. A shaded area has been highlighted running along the horizontal axis. This represents a margin for error in the assessment where industries positioned in this zone could be considered to sit on either side of the nominal Economic Contribution dividing line.

Industry Opportunity Matrix

REDLAND CITY COUNCIL, 2011

CHART 6.3



1 MEC Zone - Marginal Economic Contribution Zone

Source : Urbis

The matrix identifies six sectors representing different combinations of Employment Growth and Economic Contribution. These sectors have been given names reflecting their economic and employment context as noted below:

Stars = High Employment Growth; High Economic Contribution

Foundation Stones = High Employment Growth; Low Economic Contribution

Potential Wealth Generators = Low to Moderate Employment Growth; High Economic Contribution

Under Threat = Low to Moderate Employment Growth; Low Economic Contribution

Wealthy Decline = Negative Employment Growth; High Economic Contribution

Industrial Decline = Negative Employment Growth' Low Economic Contribution

In applying this matrix to Redland City each of the major industry groups has been categorised in one of the above groups.

INDUSTRY CATEGORY NAME	GRP CONTRIBUTION / EMPLOYMENT GROWTH	INDUSTRIES IN REDLAND CITY
Stars	↑ + ↑	▪ Currently Redland City has limited Star industries, however there is opportunity to encourage industries in adjacent categories to develop into Stars
Potential Wealth Generators	↑ + ↔	▪ Information, Media and Telecommunications, Electricity, Gas, Water and Waste Services, Financial and Insurance Services and Mining.
Wealthy Decline	↑ + ↓	▪ Agriculture, Forestry and Fishing and Wholesale Trade.
Foundation Stones	↓ + ↑	▪ Health Care and Social Assistance, Accommodation and Food Services, Education and Training, Construction, Other Services, Manufacturing and Retail Trade.
Under Threat	↓ + ↔	▪ Public Administration and Support, Transport, Postal and Warehousing as well as the Arts and Recreation Services.
Industrial Decline	↓ + ↓	▪ Rental, Hiring and Real Estate and Administrative and Support Services

One of the major benefits of using the Urbis Industry Opportunity Matrix is the insights it provides to the strategic responses required for industries that are positioned in each of the different sectors. Broadly the strategic responses for these sectors are:

Stars = Support and Invest

Foundation Stones = Maintain

Potential Wealth Generators = Invest in high growth prospects

Under Threat = Support only where important

Wealthy Decline = Support niche growth opportunities

Industrial Decline = No support

Based on these principles high level strategic responses have been identified for each Sector and Industry as outlined in the table below.

INDUSTRY OPPORTUNITY ASSESSMENT	SECTOR	STRATEGIC RESPONSE/COMMENTS
Stars		▪ Where possible, industries that fall within this category should be **supported** as they have experienced growth and exhibit a high contribution to GRP per employee.
Foundation Stones	▪ Construction ▪ Manufacturing ▪ Health Care and Social Assistance ▪ Professional, Scientific & Technical Services ▪ Accommodation and Food ▪ Education and Training ▪ Other Services ▪ Retail Trade	▪ **Maintain** and support as required. ▪ **Invest in** high value **niche** opportunities ▪ The first four industries within this category (Blue) are found within the marginal economic (MEC) zone. Meaning these industries have a greater ability to transfer into the higher value, higher growth areas (i.e. Stars) than the other four industries shown in red.
Potential Wealth Generators	▪ Mining ▪ Financial and Insurance Services ▪ Electricity, Gas, Water and Waste Services ▪ Information Media and Telecommunications	▪ These industries present high potential areas in which to **invest**. They currently have limited employment growth; however have the ability to contribute significantly to the economy on a per employee basis. ▪ The strategic response for these industries is to invest in targeted sectors and projects.
Under Threat	▪ Transport, Postal and Warehousing ▪ Public Admin and Support Services ▪ Arts and Recreation Services	▪ These industries should be **supported where deemed important** ▪ The first two industries are again found within the MEC zone. Priority should be given to development of these industries within this category as they have the ability to contribute a higher per employee wealth to the economy.
Wealthy Decline	▪ Agriculture, Forestry and Fishing ▪ Wholesale Trade	▪ Investigate **niche opportunities to support** only. ▪ As discussed previously in this report, agriculture is seen as a significant component of Redland City's identity and growth within this industry has been reviewed within the Redlands Rural Futures Strategy. We do note that agriculture also forms one of the four pillars of the State Government's vision for growing the

INDUSTRY OPPORTUNITY ASSESSMENT	SECTOR	STRATEGIC RESPONSE/COMMENTS
		economy and therefore there may be potential funding avenues. ▪ Both industries within this category fall within the MEC.
Industrial Decline	▪ Rental, Hiring and Real Estate Services ▪ Admin and Support Services	▪ Strategic Response is to **leave as is**. These industries have recently experienced decline and typically do not contribute significantly to GRP per employee.

6.4 ALIGNING COMPARATIVE STRENGTHS

The next step for the review is to assess the above matrix against the competitive advantages and disadvantages of Redland City.

INDUSTRY SECTOR	5 YEAR GROWTH RANK	2010 STRATEGY	ALIGNING WITH STRENGTHS	AVIODING WEAKNESSES	2012 STRATEGY
Foundation Stones					
▪ Health Care and Social Assistance	1 (1,235 Jobs)	2	▪ Ageing Population ▪ Strong recent growth experienced		▪ Encourage growth and encourage synergies with other growth industries (i.e. Education and Training)
▪ Professional, Scientific & Technical Services	2 (565 Jobs)	1	▪ Solid recent growth		▪ Continue supporting growth
▪ Accommodation and Food	3 (445 Jobs)	7	▪ Leverage from natural amenity		▪ Seek sustainable short term accommodation projects within activity centres and those exposed to natural amenity.

INDUSTRY SECTOR	5 YEAR GROWTH RANK	2010 STRATEGY	ALIGNING WITH STRENGTHS	AVIODING WEAKNESSES	2012 STRATEGY
▪ Education and Training	4 (411 Jobs)	5	▪ Established and well known education facilities ▪ Ability to leverage from health related training facilities		▪
▪ Construction	5 (337 Jobs)	4	▪ Benefit from forecast growth in attached housing	▪ Potential decline in detached housing	
▪ Other Services	6 (194 Jobs)	6			▪ Strategy in line with recent growth
▪ Retail Trade	7 (182 Jobs)	3			
▪ Manufacturing	8 (148 Jobs)	12	▪ Ability to align with niche rural opportunities (supported by rural future document)	▪ Limited access to regional freight routes	▪ Recent Growth suggests demand for manufacturing. Would require access to freight routes
Potential Wealth Generators					
▪ Mining	14 (31 Jobs)	15		▪ Limited opportunities	▪ Encourage where appropriate.
▪ Financial and Insurance Services	12 (60 Jobs)	11	▪ Growing superannuatio n requirements may see increased growth in this		▪ Solid growth driven by population growth. ▪ Continue to support

INDUSTRY SECTOR	5 YEAR GROWTH RANK	2010 STRATEGY	ALIGNING WITH STRENGTHS	AVIODING WEAKNESSES	2012 STRATEGY
			sector		
▪ Electricity, Gas, Water and Waste Services	11 (71 Jobs)	14			
▪ Information Media and Telecommunications	10 (79 Jobs)	13			
Under Threat					
▪ Transport, Postal and Warehousing	9 (109 Jobs)	10	▪ Potential to establish precinct at Birkdale	▪ Limited access to regional freight routes	▪
▪ Public Admin and Support Services	15 (21 Jobs)	8			
▪ Arts and Recreation Services	13 (43 jobs)	9			
Wealthy Decline					
▪ Agriculture, Forestry and Fishing	17 (-61 Jobs)	16	▪ Rural land in close proximity to a major market (South East Queensland) ▪ Redland City can establish an identifiable brand		▪ Rural Futures document has outlined key areas of growth – Would expect this industry to start growing on the back of niche projects ▪ The rural futures strategy makes reference to providing an additional 500 jobs within this

INDUSTRY SECTOR	5 YEAR GROWTH RANK	2010 STRATEGY	ALIGNING WITH STRENGTHS	AVIODING WEAKNESSES	2012 STRATEGY
					sector between 2011 and 2031.
▪ Wholesale Trade	19 (-199 Jobs)	17	▪	▪ Limited access to regional freight routes ▪ Difficult to compete with surrounding competitors.	▪ Potential opportunity at Birkdale
Industrial Decline					
▪ Rental, Hiring and Real Estate Services	18 (-126 Jobs)	n/a			▪ Growth will occur as a result of growth in all industries. ▪ Recent decline is a reflection of the GFC.
▪ Admin and Support Services	16 (-39 Jobs)	n/a			▪ Growth will occur as a result of growth in all industries. ▪ Recent decline is a reflection of the GFC.

Having reviewed the key competitive advantages of the city the following should be noted;

- A significant proportion of employment growth is forecast to originate from centre development. Centre development should therefore be encouraged and consolidated. Out of centre development should be developed only where required (e.g. essential convenience requirements).
- To protect the economic vitality of the Capalaba and Cleveland PRAC's, centre consolidation is required. Investment strategies and specific implementation plans and associated marketing need to be developed to establish and encourage private investment.
- To assist and encourage in the development of centres they should be able to provide;
  – Vitality – encourage strong social and cultural interaction

- Provide strong economic function – by consolidation of uses. Review short term catalytic projects and identify the attractiveness of development within each centre.

- Provide diversity – a mix of strong interlinked uses within the city should be encouraged, synergies identified (i.e. mix of attractive retail and open space environments can enhance visitor experience)

- Planning and Urban Design – encourage growth and consolidation of uses whilst providing attractive environments.

- Linkages and Networks – the role and function of each centre should be defined and operate as in conjunction with all centres within the hierarchy.

- Ecologically Sustainable – Leverage from Redland City's environment to provide ecologically sustainable centres.

- 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 Key Insights and Recommendations

7.1 FINDINGS

Demographic Trend Analysis

- Redland has an ageing population
- Of the 42,500 additional residents forecast for Redland (C) in the next 20 years, the prime working age group (20-64 years of age) are forecast to grow by only 8,500 residents.
- Redland residents currently have a high proportion of low to middle income earners (65%)
- Compared to Brisbane, Redland City residents have a:
  - Significantly lower proportion of professionals.
  - Significantly higher proportion of technicians and trade workers.
  - Slightly higher proportion of labourers and machinery operators.
- Redland City Residents work predominantly in the Health Care and Social Assistance (12%), Retail Trade (12%), Construction (11%) and Manufacturing (11%) industry sectors.

Industrial Lands Review

- Confirmed the finding of the 2010 Strategy that the City's existing network of industrial lands and the integrated employment area at Redland Bay provides sufficient opportunity to accommodate forecast demand for industrial land to 2031. In the longer term, given the limited opportunity for future industrial land releases, the opportunity to increase industrial land utilisation (i.e. height and site coverage etc.) through the Planning Scheme along with focusing investment strategies on population serving industrial activity that requires to be located within the City should be considered.
- Should the City seek to provide an additional industrial area to attract export orientated industry it would need to meet the following to be regionally competitive:
  - In close proximity to the Port of Brisbane;
  - Relatively flat land with minimal constraints (vegetation, bushfire etc);
  - Offers a comparatively cheaper price point than regional competitors like Yatala Enterprise Area and the Australia Trade Coast;
  - Established infrastructure links – Old Cleveland Road/Moreton Bay Road – Gateway Motorway;
  - Significant scale (i.e. >50ha);
  - Leverage from Brisbane market; and
  - Consolidated land ownership.
- By reviewing the necessary requirements of a major employment area we have suggested the site should be in close proximity to Capalaba, located on a major existing infrastructure with ease of access to the Brisbane Ports. A site that potentially meets the above criteria is identified at Birkdale.
- The former Thornlands Integrated Employment Investigation Area does not meet the above criteria for a regionally competitive employment area.

- **Minimum lot size** – in relation to this element Redland is comparable to neighbouring cities. In fact industrial lots are typically not smaller than this size given the difficulty in making them function if they are smaller.

- **Site cover** – the site cover specified is very conservative compared to surrounding cities. Increasing site cover should be examined as part of the new planning scheme. 75% site cover is considered best practice.

- **Height** – Building height is generally more conservative than surrounding areas. Again this could be revised as part of the new planning scheme to be increased to 15m.

- **Setbacks** – These seem overly generous given the character and nature of these areas and should be reviewed with a view to reducing setback requirements where appropriate.

- **Uses** – Possible uses seem comparable to surrounding cities. Council may want to investigate the option of making changes of use to existing industrial buildings self-assessable as a further incentive of doing business in the Redlands.

Investment Profile

- 6 out of the top 10 projects by estimated value are within the Health Care and Social Assistance industry.

- This comprises approximately 48% of total proposed investment above $1M in the Redland local government area.

- Other industries with significant future investment include Education and Training ($120 million) and Mixed Use projects ($44 million).

- Given the ageing profile and socio-economic characteristics of the Redland City Council municipality, there is a strong level of investment within the Aged Care and Social Assistance industry. Investment into this industry is expected to continue to outweigh the other industries as the population of the City continues to age. As a result of this ageing population, we expect the employment within this industry sector to surpass the Retail sector as the greatest employment industry in the City.

- Non-employing businesses comprise the majority of the businesses within Redland City Council and are dominated by individuals working within the construction industry. These individuals suggest a high level of sub-contractor trade workers.

- There were around 112 additional businesses in 2011 compared to 2009. Of these a large proportion comprised non-employing businesses within the Professional, Scientific and Technical Services, Financial and Insurance Services as well as Administrative and Support Services.

Employment Analysis

- Top five growth industries between 2006 and 2011 included Hospitals (417 jobs), Computer System Design and Related Services (333 jobs), Takeaway Food Services (314 jobs), Primary Education (204 jobs) and Combined Primary and Secondary Education (195 jobs).

- Industries that have grown as a result of an ageing population that feature within the top 30 growth industries include Hospitals (417 jobs), Other Social Assistance Services (285 jobs), Aged Care Residential Services (188 jobs), Pharmaceutical, Cosmetic and Toiletry Goods Retailing (93 jobs) and Other Allied Health Services (78 jobs).

- Notably, Education and Child Care has continued to grow within Redland City with Primary Education and Secondary Education (473 jobs) and Child Care Services (165 jobs).

- Poultry processing was the only agricultural growth industry within the top 30 over the last 5 years.

- Of note, Whiteware Appliance Manufacturing (-172 jobs) and Other Electrical and Electronic Goods Wholesaling (-126 jobs) declined between 2006 and 2011, signifying the closure of Fisher and Paykel in 2009.

- Manufacturing in general has declined with notable declines being Polymer Film and Sheet Packaging Material Manufacturing (-47 jobs), Electric Lighting Equipment Manufacturing (-20 jobs), Wooden Structural Fitting and Component Manufacturing (-20 jobs) and Leather Tanning, Fur Dressing and Leather Product Manufacturing (-17 jobs).

- The top 30 industries in decline accounted for around 1,300 job losses for the City.

- The rate of employment self-sufficiency (the proportion of working residents to the number of City jobs) in the City improved slightly during 2006-2011 with Redland City being the only local government in SEQ to record any improvement in its self-sufficiency rate. This builds on the steady improvement of employment self-sufficiency in the City that has seen it increase from 46.5% in 1996 to 50% in 2001 and to 52% in 2006. This is a positive sign for a growing economy.

- Over the period 2006-2011 the City workforce increased by 6,259 with an additional 2,591 of the City workforce being employed within the City. This represents an employment self-sufficiency rate of around 41% (the proportion of working residents that area employed within the City). The overall City rate of employment self-sufficiency has remained the same as in 2006 at around 40%.

- Overall, Redland City has seen a 7% increase in the net shortfall of local jobs. The industry with the largest increase in net shortfall in percentage terms is Mining, which saw a 117% (in should be noted that this is from a relatively low base) increase in net shortfall. Information Media and Telecommunications saw the largest percentage decrease in net shortfall, decreasing by 14% from 2006.

- Redland saw a decline in employment diversity, falling from a rank from 5th to 6th as it was slightly outpaced by Logan. Redland has moderate employment diversity compared to the other SEQ LGAs, though has seen a higher concentration of industries in recent time.

- Total employment within Redland City has grown by 3,498 workers or 11% between 2006 and 2011 with the majority of this growth centred at Capalaba (1,484 workers), Victoria Point (769 workers) and Cleveland (513 workers).

Role and Function

- Alexandra Hills (246 workers), Thornlands (77 workers) and Thorneside (382 workers) experienced a decline in employment.

- Over the last 5 years, Sheldon-Mt Cotton (50%), Victoria Point (42%), Capalaba (30%), Redland Islands (27%), Redland Bay (24%) and Wellington Point (22%) have all experienced more than 20% of their forecast 25 year jobs growth. As the last five years has represented 20% of the forecast period, we can ascertain that these areas have been growing faster than expected under the Strategy.

- The implication for the RPS revision is that further analysis is required to understand the land supply by type in each of these sub-markets going forward.

- Capalaba is a predominately retail and commercial destination, as well as being the Redland SA2 with the highest total number of employees. Given this function, Capalaba has a very high proportion of Retail Trade (26.7%) and Manufacturing (12.1%) employment of Capalaba employees.

- Cleveland is primarily positioned as the administrative hub of Redland, and is home to 7.4 employees per hectare, which is the highest of the Redland SA2s. Cleveland has high proportions of Medical (Health Care & Social Assistance), Administration (Public Administration and Safety) and Retail (Retail Trade) employees. Collectively, these industries represent 43.9% of employment, as would be expected in a PRAC.

- A significant proportion of employment growth is forecast to originate from centre development. Centre development should therefore be encouraged and consolidated. Out of centre development should be developed only where required (e.g. essential convenience requirements).

- To protect the economic vitality of the Capalaba and Cleveland PRAC's, centre consolidation is required. Investment strategies and specific implementation plans and associated marketing need to be developed to establish and encourage private investment.

Summary

- It follows that the key competitive advantages of Redland City are amenity, lifestyle, established education facilities, a growing market for health and social assistance and proximity to a significant and diverse natural eco-system (i.e. Moreton Bay). To ensure a diverse and strong economy these advantages need to align with the employment strategy (this is reviewed in the following section).

- Conversely Redland City has limited supply of unconstrained land and therefore limited opportunities to provide affordable developable land. In addition the city is isolated to major freight routes when compared to its major competitors. Again, these comparative disadvantages should have implications on the employment strategy.

7.2 REALIGNING THE STRATEGY

FACTOR/MEASURE	2010 STRATEGY	2012 REVIEW	ACTION/CHANGE/RESPONSE
DEMOGRAPHIC IMPLICATIONS			
▪ Ageing Population and decreasing workforce	▪ Improve self-sufficiency	▪ Forecast workforce is ageing and resultant labour participation reducing.	▪ Increase employment opportunities for the younger demographic. Encourage an inflow of younger working age ▪ Concentrate on level of jobs growth rather than self-sufficiency. ▪ Encourage growth in industries that attract an in-flow of labour force. ▪ Leverage from specific educational and health opportunities. ▪ Potential to develop Birkdale as an employment precinct enables close proximity to working age residents within Brisbane.
INDUSTRIAL LANDS REVIEW			
▪ Future of the Former Thornlands Employment	▪ n.a.	▪ Establish a portion of the former Thornlands	▪ Determine the land requirement for a Rural

FACTOR/MEASURE	2010 STRATEGY	2012 REVIEW	ACTION/CHANGE/RESPONSE
Investigation Area		Enterprise Precinct as a Rural Enterprise Precinct, hosting land uses such as those outlined within the Draft Redlands Rural Futures Strategy	Based Enterprise Precinct
▪ Other Enterprise Precinct Opportunities	▪ n.a.	▪ Determine appropriate locations close to Capalaba. Investigate potential to establish a 50+ha precinct on Old Cleveland Rd, Birkdale	▪ Investigate opportunity for export oriented enterprise precinct within Birkdale
▪ Access to Regional Enterprise Precincts	▪ Improve transport links to regionally significant employment nodes	▪ Development of an enterprise precinct within Birkdale will have the ability to encourage self-sufficiency.	▪ Establish as required with priority given to local employment generators as developers.
▪ Demand for Industrial Lands	▪ The current City's network of industrial lands and the integrated employment area at Redland Bay provides sufficient opportunity to accommodate forecast demand for industrial land to 2031	▪ Demand for industry uses will be in line with population requirements. Currently enough industry land to cope with forecast population growth at a regional level. Potential that sub-areas are increasingly constrained	▪ Growing at slower rates than forecast at the City level. ▪ Potentially review individual industrial areas by industrial use to determine the net supply equation by industrial area.
EMPLOYMENT ANALYSIS			
▪ 2011 Employment	▪ 36,394 = number of 2011 forecast jobs	▪ 35,593 = actual jobs growth	▪ -801 Jobs
▪ 2031 Employment	▪ 50,009 jobs realigned	▪ 48,908 jobs realigned	▪ -1,101 jobs
▪ Ageing Population and Workforce		▪ Identified ageing workforce.	▪ Need to encourage in-flow of working age people by providing regionally attractive employment.

FACTOR/MEASURE	2010 STRATEGY	2012 REVIEW	ACTION/CHANGE/RESPONSE
FUTURE ROLE AND FUNCTION OPPORTUNITIES			
▪ Capalaba	▪ 2,481 new in-centre jobs between 2006-2031 ▪ 82,500 sq.m of additional in-centre commercial and retail floorspace (at an average of 33sq.m per employee) ▪ 13,500 sq.m of out-of centre retail and commercial floorspace ▪ Continuation of large format retail and commercial activities adjacent to the Major Centre Zone	▪ 456 new employees within the centre (assumes Public Admin and Safety, Retail Trade, Professional, Scientific and technical services, Admin and Support Services, Financial and Insurance Services, Information Media and Telecommunication ▪ 15,000 sq.m with new employment assuming 33sq.m per employee	▪ Continue to monitor in-centre development, currently in-centre growth is tracking in-line with 2010 strategy ▪ Last five years approximately 15.7% of the future 96,000 sq.m in-centre and out-of centre retail and commercial floorspace has been taken up
▪ Cleveland	▪ 2,481 new in-centre jobs between 2006-2031 ▪ 82,000 sq.m of additional in-centre commercial and retail floorspace (at an average of 33sq.m per employee) ▪ 523 new out of centre commercial and retail jobs growth between 2006	▪ -42 new employees within the centre (assumes Public Admin and Safety, Retail Trade, Professional, Scientific and technical services, Admin and Support Services, Financial and Insurance Services, Information Media and Telecommunication ▪	▪ Continue to monitor centre development, recently centre growth has experienced negative growth over the last 5 years ▪ Review and prioritise identified catalytic projects and identify necessary implementation strategy. ▪ We note that council have proposed a CBD incentives package which aims to stimulate development and attract new business to the city through financial and regulatory provisions.

FACTOR/MEASURE	2010 STRATEGY	2012 REVIEW	ACTION/CHANGE/RESPONSE
	and 2031 ▪ 15,000 sq.m of out-of centre retail and commercial floorspace ▪ Continuation of large format retail and commercial activities adjacent to the Major Centre Zone		
▪ Victoria Point	▪ Potential to become a major centre under the Regional Plan	▪ Significant employment growth within the last five years ▪ Specific growth industries included accommodation and food services, retail trade and health care and social assistance	▪ Growing need for Victoria Point to become a Major Centre
▪ Industry Growth	▪ TBC	▪ Currently no star industries ▪ Huge potential opportunities	▪ Encourage development within potential wealth generators and those industries within the marginal economic zone

7.3 RECOMMENDATIONS

This Employment Strategy Review has drawn on the most recent Census data (2011), investment information, and government policy directions to provide an update on the progress of the City's Employment Strategy and provide recommendations for future actions to strengthen the Strategy and facilitate economic growth across the City. This Review provides the following recommendations in respect to strengthening the Employment Strategy:

- Prioritise key actions to realign the strategy
- Identify resource capacity and capability for prioritised actions
- Review preferred industry sectors for investment and identify required actions and project

In undertaking this review a number of insights and opportunities have been unearthed to facilitate increased economic growth across the City. In relation to this, the Redland City Council should revise its Economic Development Strategy to focus on leveraging the City's comparative strengths and aligns with the Council's resource capacity and capability. This work should seek to identify clear catalytic projects that include a funding strategy.

Appendix A Employment Growth by 4 Digit ANZSIC Code

Agriculture, Forestry and Fishing - 4 Digit ANZSIC

REDLAND CITY

TABLE A1

Industry	2006	2011	2006-2011 Growth No.
Agriculture, Forestry and Fishing, nfd	0	0	0
Agriculture, nfd	27	19	-8
Nursery and Floriculture Production, nfd	6	0	-6
Nursery Production (Under Cover)	20	0	-20
Nursery Production (Outdoors)	24	58	34
Turf Growing	5	4	-1
Floriculture Production (Under Cover)	0	0	0
Floriculture Production (Outdoors)	45	31	-14
Mushroom and Vegetable Growing, nfd	0	0	0
Mushroom Growing	4	12	8
Vegetable Growing (Under Cover)	10	5	-5
Vegetable Growing (Outdoors)	19	19	0
Fruit and Tree Nut Growing, nfd	10	4	-6
Grape Growing	0	0	0
Kiwifruit Growing	0	0	0
Berry Fruit Growing	7	0	-7
Apple and Pear Growing	0	0	0
Stone Fruit Growing	3	4	1
Citrus Fruit Growing	0	0	0
Olive Growing	0	0	0
Other Fruit and Tree Nut Growing	16	0	-16
Sheep, Beef Cattle and Grain Farming, nfd	0	0	0
Sheep Farming (Specialised)	0	0	0
Beef Cattle Farming (Specialised)	9	3	-6
Beef Cattle Feedlots (Specialised)	0	0	0
Sheep-Beef Cattle Farming	3	0	-3
Sheep, Beef Cattle and Grain Farming, nfd	0	0	0
Rice Growing	0	0	0
Other Grain Growing	3	0	-3
Other Crop Growing, nfd	0	0	0
Sugar Cane Growing	0	0	0
Cotton Growing	0	4	4
Other Crop Growing nec	0	0	0
Dairy Cattle Farming	0	0	0
Poultry Farming, nfd	30	37	7
Poultry Farming (Meat)	48	40	-8
Poultry Farming (Eggs)	18	10	-8
Deer Farming	0	0	0
Other Livestock Farming, nfd	0	0	0
Horse Farming	0	0	0
Pig Farming	0	0	0
Beekeeping	0	4	4
Other Livestock Farming nec	0	4	4
Aquaculture, nfd	0	0	0
Offshore Longline and Rack Aquaculture	11	9	-2
Offshore Caged Aquaculture	3	0	-3
Onshore Aquaculture	0	0	0
Forestry and Logging, nfd	0	0	0
Forestry	0	0	0
Logging	0	0	0
Fishing, Hunting and Trapping, nfd	15	18	3
Fishing, nfd	6	5	-1
Rock Lobster and Crab Potting	6	0	-6
Prawn Fishing	7	5	-2
Line Fishing	0	0	0
Fish Trawling, Seining and Netting	3	0	-3
Other Fishing	4	0	-4
Hunting and Trapping	0	0	0
Agriculture, Forestry and Fishing Support Services, nfd	0	0	0
Forestry Support Services	3	7	4
Agriculture and Fishing Support Services, nfd	0	0	0
Cotton Ginning	0	0	0
Shearing Services	0	0	0
Other Agriculture and Fishing Support Services	9	15	6
Redland Total	**374**	**317**	**-57**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Mining - 4 Digit ANZSIC

REDLAND CITY | TABLE A2

Industry	2006	2011	2006-2011 Growth No.
Mining, nfd	14	25	11
Coal Mining	3	5	2
Oil and Gas Extraction	0	0	0
Metal Ore Mining, nfd	0	0	0
Iron Ore Mining	0	0	0
Bauxite Mining	0	0	0
Copper Ore Mining	0	0	0
Gold Ore Mining	0	0	0
Mineral Sand Mining	132	130	-2
Nickel Ore Mining	0	0	0
Silver-Lead-Zinc Ore Mining	0	0	0
Other Metal Ore Mining	0	0	0
Non-Metallic Mineral Mining and Quarrying, nfd	6	4	-2
Construction Material Mining, nfd	0	0	0
Gravel and Sand Quarrying	47	51	4
Other Construction Material Mining	3	9	6
Other Non-Metallic Mineral Mining and Quarrying	10	4	-6
Exploration and Other Mining Support Services, nfd	0	0	0
Exploration, nfd	0	3	3
Petroleum Exploration	0	0	0
Mineral Exploration	0	16	16
Other Mining Support Services	9	13	4
Redland Total	**224**	**260**	**36**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Manufacturing - 4 Digit ANZSIC

REDLAND CITY | TABLE A3

Industry	2006	2011	2006-2011 Growth No.
Metal Furniture Manufacturing	0	0	0
Mattress Manufacturing	0	0	0
Other Furniture Manufacturing	28	30	2
Other Manufacturing, nfd	0	0	0
Jewellery and Silverware Manufacturing	12	6	-6
Toy, Sporting and Recreational Product Manufacturing	3	3	0
Other Manufacturing nec	31	5	-26
Redland Total	**3,001**	**3,098**	**-30**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Manufacturing - 4 Digit ANZSIC

REDLAND CITY

TABLE A4

Industry	2006	2011	2006-2011 Growth No.
Manufacturing, nfd	243	384	141
Food Product Manufacturing, nfd	13	28	15
Meat and Meat Product Manufacturing, nfd	0	0	0
Meat Processing	9	10	1
Poultry Processing	506	603	97
Cured Meat and Smallgoods Manufacturing	0	0	0
Seafood Processing	7	5	-2
Dairy Product Manufacturing, nfd	0	0	0
Milk and Cream Processing	0	0	0
Ice Cream Manufacturing	0	0	0
Cheese and Other Dairy Product Manufacturing	0	0	0
Fruit and Vegetable Processing	17	32	15
Oil and Fat Manufacturing	0	5	5
Grain Mill and Cereal Product Manufacturing, nfd	0	0	0
Grain Mill Product Manufacturing	0	0	0
Cereal, Pasta and Baking Mix Manufacturing	4	3	-1
Bakery Product Manufacturing, nfd	0	0	0
Bread Manufacturing (Factory based)	95	142	47
Cake and Pastry Manufacturing (Factory based)	45	44	-1
Biscuit Manufacturing (Factory based)	4	15	11
Bakery Product Manufacturing (Non-factory based)	108	121	13
Sugar and Confectionery Manufacturing, nfd	0	0	0
Sugar Manufacturing	3	0	-3
Confectionery Manufacturing	0	0	0
Other Food Product Manufacturing, nfd	0	0	0
Potato, Corn and Other Crisp Manufacturing	0	0	0
Prepared Animal and Bird Feed Manufacturing	36	37	1
Other Food Product Manufacturing nec	6	11	5
Beverage and Tobacco Product Manufacturing, nfd	3	3	0
Beverage Manufacturing, nfd	0	0	0
Soft Drink, Cordial and Syrup Manufacturing	10	9	-1
Beer Manufacturing	3	6	3
Spirit Manufacturing	0	4	4
Wine and Other Alcoholic Beverage Manufacturing	70	81	11
Cigarette and Tobacco Product Manufacturing	0	0	0
Textile, Leather, Clothing and Footwear Manufacturing, nfd	9	8	-1
Textile Manufacturing, nfd	0	0	0
Wool Scouring	0	0	0
Natural Textile Manufacturing	0	0	0
Synthetic Textile Manufacturing	3	9	6
Leather Tanning, Fur Dressing and Leather Product Manufacturing	17	0	-17
Textile Product Manufacturing, nfd	0	0	0
Textile Floor Covering Manufacturing	3	0	-3
Rope, Cordage and Twine Manufacturing	0	0	0
Cut and Sewn Textile Product Manufacturing	50	42	-8
Textile Finishing and Other Textile Product Manufacturing	21	10	-11
Knitted Product Manufacturing	0	0	0
Clothing and Footwear Manufacturing, nfd	0	0	0
Clothing Manufacturing	60	45	-15
Footwear Manufacturing	9	4	-5
Wood Product Manufacturing, nfd	7	0	-7
Log Sawmilling and Timber Dressing, nfd	3	4	1
Log Sawmilling	6	0	-6
Wood Chipping	0	0	0
Timber Resawing and Dressing	3	3	0
Other Wood Product Manufacturing, nfd	5	4	-1
Prefabricated Wooden Building Manufacturing	3	5	2
Wooden Structural Fitting and Component Manufacturing	153	133	-20
Veneer and Plywood Manufacturing	0	0	0
Reconstituted Wood Product Manufacturing	0	0	0
Other Wood Product Manufacturing nec	21	13	-8
Pulp, Paper and Converted Paper Product Manufacturing, nfd	3	0	-3
Pulp, Paper and Paperboard Manufacturing	0	0	0
Converted Paper Product Manufacturing, nfd	0	0	0

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Manufacturing - 4 Digit ANZSIC

REDLAND CITY

TABLE A4 CONT.

Industry	2006	2011	2006-2011 Growth No.
Corrugated Paperboard and Paperboard Container Manufacturing	0	0	0
Paper Bag Manufacturing	0	0	0
Paper Stationery Manufacturing	8	19	11
Sanitary Paper Product Manufacturing	0	0	0
Other Converted Paper Product Manufacturing	0	19	19
Printing (including the Reproduction of Recorded Media), nfd	0	0	0
Printing and Printing Support Services, nfd	0	0	0
Printing	109	67	-42
Printing Support Services	6	3	-3
Reproduction of Recorded Media	4	4	0
Petroleum and Coal Product Manufacturing, nfd	0	0	0
Petroleum Refining and Petroleum Fuel Manufacturing	0	19	19
Other Petroleum and Coal Product Manufacturing	0	0	0
Basic Chemical and Chemical Product Manufacturing, nfd	3	0	-3
Basic Chemical Manufacturing, nfd	0	0	0
Industrial Gas Manufacturing	0	0	0
Basic Organic Chemical Manufacturing	0	0	0
Basic Inorganic Chemical Manufacturing	0	0	0
Basic Polymer Manufacturing, nfd	0	0	0
Synthetic Resin and Synthetic Rubber Manufacturing	0	0	0
Other Basic Polymer Manufacturing	0	0	0
Fertiliser and Pesticide Manufacturing, nfd	0	0	0
Fertiliser Manufacturing	0	0	0
Pesticide Manufacturing	0	0	0
Pharmaceutical and Medicinal Product Manufacturing, nfd	0	0	0
Human Pharmaceutical and Medicinal Product Manufacturing	0	11	11
Veterinary Pharmaceutical and Medicinal Product Manufacturing	0	3	3
Cleaning Compound and Toiletry Preparation Manufacturing, nfd	0	0	0
Cleaning Compound Manufacturing	6	16	10
Cosmetic and Toiletry Preparation Manufacturing	3	12	9
Other Basic Chemical Product Manufacturing, nfd	0	0	0
Photographic Chemical Product Manufacturing	0	0	0
Explosive Manufacturing	0	0	0
Other Basic Chemical Product Manufacturing nec	0	0	0
Polymer Product and Rubber Product Manufacturing, nfd	0	0	0
Polymer Product Manufacturing, nfd	3	4	1
Polymer Film and Sheet Packaging Material Manufacturing	47	0	-47
Rigid and Semi-Rigid Polymer Product Manufacturing	19	17	-2
Polymer Foam Product Manufacturing	0	0	0
Tyre Manufacturing	7	7	0
Adhesive Manufacturing	6	0	-6
Paint and Coatings Manufacturing	21	25	4
Other Polymer Product Manufacturing	0	4	4
Natural Rubber Product Manufacturing	0	4	4
Non-Metallic Mineral Product Manufacturing, nfd	10	13	3
Glass and Glass Product Manufacturing	17	12	-5
Ceramic Product Manufacturing, nfd	0	0	0
Clay Brick Manufacturing	0	0	0
Other Ceramic Product Manufacturing	3	8	5
Cement, Lime, Plaster and Concrete Product Manufacturing, nfd	8	4	-4
Cement and Lime Manufacturing	0	4	4
Plaster Product Manufacturing	6	5	-1
Ready-Mixed Concrete Manufacturing	24	15	-9
Concrete Product Manufacturing	11	0	-11
Other Non-Metallic Mineral Product Manufacturing	6	13	7
Primary Metal and Metal Product Manufacturing, nfd	0	0	0
Iron Smelting and Steel Manufacturing	95	79	-16
Basic Ferrous Metal Product Manufacturing, nfd	0	0	0
Iron and Steel Casting	5	0	-5
Steel Pipe and Tube Manufacturing	4	8	4
Basic Non-Ferrous Metal Manufacturing, nfd	14	14	0
Alumina Production	0	0	0
Aluminium Smelting	7	8	1
Copper, Silver, Lead and Zinc Smelting and Refining	0	0	0

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Manufacturing - 4 Digit ANZSIC

Industry	2006	2011	2006-2011 Growth No.
Other Basic Non-Ferrous Metal Manufacturing	0	0	0
Basic Non-Ferrous Metal Product Manufacturing, nfd	0	0	0
Non-Ferrous Metal Casting	0	0	0
Aluminium Rolling, Drawing, Extruding	0	6	6
Other Basic Non-Ferrous Metal Product Manufacturing	7	5	-2
Fabricated Metal Product Manufacturing, nfd	3	8	5
Iron and Steel Forging	0	0	0
Structural Metal Product Manufacturing, nfd	0	0	0
Structural Steel Fabricating	45	35	-10
Prefabricated Metal Building Manufacturing	3	4	1
Architectural Aluminium Product Manufacturing	25	15	-10
Metal Roof and Guttering Manufacturing (except Aluminium)	0	0	0
Other Structural Metal Product Manufacturing	32	35	3
Metal Container Manufacturing, nfd	0	0	0
Boiler, Tank and other Heavy Gauge Metal Container Manufacturing	0	3	3
Other Metal Container Manufacturing	0	0	0
Sheet Metal Product Manufacturing (except Metal Structural and Container Products)	4	4	0
Other Fabricated Metal Product Manufacturing, nfd	0	0	0
Spring and Wire Product Manufacturing	24	25	1
Nut, Bolt, Screw and Rivet Manufacturing	6	4	-2
Metal Coating and Finishing	5	9	4
Other Fabricated Metal Product Manufacturing nec	36	39	3
Transport Equipment Manufacturing, nfd	8	0	-8
Motor Vehicle and Motor Vehicle Part Manufacturing, nfd	0	4	4
Motor Vehicle Manufacturing	21	21	0
Motor Vehicle Body and Trailer Manufacturing	31	40	9
Automotive Electrical Component Manufacturing	0	4	4
Other Motor Vehicle Parts Manufacturing	17	29	12
Other Transport Equipment Manufacturing, nfd	6	0	-6
Shipbuilding and Repair Services	3	9	6
Boatbuilding and Repair Services	55	60	5
Railway Rolling Stock Manufacturing and Repair Services	3	0	-3
Aircraft Manufacturing and Repair Services	3	0	-3
Other Transport Equipment Manufacturing nec	6	0	-6
Machinery and Equipment Manufacturing, nfd	57	48	-9
Professional and Scientific Equipment Manufacturing, nfd	0	0	0
Photographic, Optical and Ophthalmic Equipment Manufacturing	7	4	-3
Medical and Surgical Equipment Manufacturing	23	28	5
Other Professional and Scientific Equipment Manufacturing	11	26	15
Computer and Electronic Equipment Manufacturing, nfd	3	9	6
Computer and Electronic Office Equipment Manufacturing	3	0	-3
Communication Equipment Manufacturing	11	9	-2
Other Electronic Equipment Manufacturing	11	10	-1
Electrical Equipment Manufacturing, nfd	0	0	0
Electric Cable and Wire Manufacturing	0	9	9
Electric Lighting Equipment Manufacturing	76	54	-22
Other Electrical Equipment Manufacturing	31	22	-9
Domestic Appliance Manufacturing, nfd	0	0	0
Whiteware Appliance Manufacturing	240	68	-172
Other Domestic Appliance Manufacturing	8	10	2
Pump, Compressor, Heating and Ventilation Equipment Manufacturing, nfd	0	3	3
Pump and Compressor Manufacturing	0	0	0
Fixed Space Heating, Cooling and Ventilation Equipment Manufacturing	11	0	-11
Specialised Machinery and Equipment Manufacturing, nfd	0	0	0
Agricultural Machinery and Equipment Manufacturing	0	3	3
Mining and Construction Machinery Manufacturing	12	39	27
Machine Tool and Parts Manufacturing	0	0	0
Other Specialised Machinery and Equipment Manufacturing	0	20	20
Other Machinery and Equipment Manufacturing, nfd	0	0	0
Lifting and Material Handling Equipment Manufacturing	6	5	-1
Other Machinery and Equipment Manufacturing nec	6	24	18
Furniture and other Manufacturing, nfd	0	0	0
Furniture Manufacturing, nfd	0	0	0
Wooden Furniture and Upholstered Seat Manufacturing	58	64	6

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Electricity, Gas, Water and Waste Services Division - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Electricity, Gas, Water and Waste Services, nfd	3	5	2
Electricity Supply, nfd	10	9	-1
Electricity Generation, nfd	0	0	0
Fossil Fuel Electricity Generation	3	0	-3
Hydro-electricity Generation	0	0	0
Other Electricity Generation	4	3	-1
Electricity Transmission	0	0	0
Electricity Distribution	23	28	5
On Selling Electricity and Electricity Market Operation	0	0	0
Gas Supply	6	4	-2
Water Supply, Sewerage and Drainage Services, nfd	0	4	4
Water Supply	54	71	17
Sewerage and Drainage Services	3	6	3
Waste Collection, Treatment and Disposal Services, nfd	0	0	0
Waste Collection Services, nfd	6	22	16
Solid Waste Collection Services	30	37	7
Other Waste Collection Services	3	10	7
Waste Treatment, Disposal and Remediation Services, nfd	0	0	0
Waste Treatment and Disposal Services	58	67	9
Waste Remediation and Materials Recovery Services	7	9	2
Redland Total	**210**	**275**	**65**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Construction Division - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Construction, nfd	69	76	7
Building Construction, nfd	88	78	-10
Residential Building Construction, nfd	0	0	0
House Construction	699	657	-42
Other Residential Building Construction	13	20	7
Non-Residential Building Construction	74	96	22
Heavy and Civil Engineering Construction, nfd	0	0	0
Road and Bridge Construction	44	48	4
Other Heavy and Civil Engineering Construction	65	72	7
Construction Services, nfd	29	35	6
Land Development and Site Preparation Services, nfd	0	0	0
Land Development and Subdivision	17	16	-1
Site Preparation Services	159	164	5
Building Structure Services, nfd	0	0	0
Concreting Services	161	165	4
Bricklaying Services	47	28	-19
Roofing Services	52	62	10
Structural Steel Erection Services	6	18	12
Building Installation Services, nfd	0	6	6
Plumbing Services	172	260	88
Electrical Services	270	445	175
Air Conditioning and Heating Services	65	66	1
Fire and Security Alarm Installation Services	23	23	0
Other Building Installation Services	20	31	11
Building Completion Services, nfd	0	0	0
Plastering and Ceiling Services	60	59	-1
Carpentry Services	164	144	-20
Tiling and Carpeting Services	69	89	20
Painting and Decorating Services	113	149	36
Glazing Services	34	18	-16
Other Construction Services, nfd	0	0	0
Landscape Construction Services	83	102	19
Hire of Construction Machinery with Operator	11	18	7
Other Construction Services nec	54	60	6
Redland Total	**2,661**	**3,005**	**344**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Wholesale Trade - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Wholesale Trade, nfd	102	71	-31
Basic Material Wholesaling, nfd	0	0	0
Agricultural Product Wholesaling, nfd	0	0	0
Wool Wholesaling	0	0	0
Cereal Grain Wholesaling	6	4	-2
Other Agricultural Product Wholesaling	247	183	-64
Mineral, Metal and Chemical Wholesaling, nfd	0	0	0
Petroleum Product Wholesaling	17	5	-12
Metal and Mineral Wholesaling	24	12	-12
Industrial and Agricultural Chemical Product Wholesaling	50	25	-25
Timber and Hardware Goods Wholesaling, nfd	0	0	0
Timber Wholesaling	40	34	-6
Plumbing Goods Wholesaling	38	46	8
Other Hardware Goods Wholesaling	97	88	-9
Machinery and Equipment Wholesaling, nfd	8	12	4
Specialised Industrial Machinery and Equipment Wholesaling, nfd	0	0	0
Agricultural and Construction Machinery Wholesaling	9	9	0
Other Specialised Industrial Machinery and Equipment Wholesaling	19	17	-2
Other Machinery and Equipment Wholesaling, nfd	3	6	3
Professional and Scientific Goods Wholesaling	20	31	11
Computer and Computer Peripheral Wholesaling	13	33	20
Telecommunication Goods Wholesaling	13	12	-1
Other Electrical and Electronic Goods Wholesaling	252	126	-126
Other Machinery and Equipment Wholesaling nec	29	50	21
Motor Vehicle and Motor Vehicle Parts Wholesaling, nfd	4	0	-4
Car Wholesaling	25	20	-5
Commercial Vehicle Wholesaling	0	0	0
Trailer and Other Motor Vehicle Wholesaling	5	7	2
Motor Vehicle New Parts Wholesaling	52	66	14
Motor Vehicle Dismantling and Used Parts Wholesaling	30	25	-5
Grocery, Liquor and Tobacco Product Wholesaling, nfd	0	0	0
General Line Grocery Wholesaling	0	0	0
Meat, Poultry and Smallgoods Wholesaling	34	44	10
Dairy Produce Wholesaling	9	5	-4
Fish and Seafood Wholesaling	3	9	6
Fruit and Vegetable Wholesaling	16	10	-6
Liquor and Tobacco Product Wholesaling	13	5	-8
Other Grocery Wholesaling	102	70	-32
Other Goods Wholesaling, nfd	7	3	-4
Textile, Clothing and Footwear Wholesaling, nfd	0	0	0
Textile Product Wholesaling	0	4	4
Clothing and Footwear Wholesaling	26	32	6
Pharmaceutical and Toiletry Goods Wholesaling	30	42	12
Furniture, Floor Covering and Other Goods Wholesaling, nfd	13	9	-4
Furniture and Floor Covering Wholesaling	22	45	23
Jewellery and Watch Wholesaling	6	4	-2
Kitchen and Diningware Wholesaling	11	15	4
Toy and Sporting Goods Wholesaling	6	8	2
Book and Magazine Wholesaling	6	6	0
Paper Product Wholesaling	35	47	12
Other Goods Wholesaling nec	31	45	14
Commission-Based Wholesaling	10	15	5
Redland Total	**1,483**	**1,300**	**-183**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Retail Trade - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Retail Trade, nfd	196	205	9
Motor Vehicle and Motor Vehicle Parts Retailing, nfd	0	0	0
Motor Vehicle Retailing, nfd	4	3	-1
Car Retailing	221	220	-1
Motor Cycle Retailing	0	8	8
Trailer and Other Motor Vehicle Retailing	3	0	-3
Motor Vehicle and Motor Vehicle Parts Retailing, nfd	0	0	0
Motor Vehicle Parts Retailing	86	83	-3
Tyre Retailing	24	33	9
Fuel Retailing	150	150	0
Food Retailing, nfd	46	14	-32
Supermarket and Grocery Stores	1,459	1,484	25
Specialised Food Retailing, nfd	0	0	0
Fresh Meat, Fish and Poultry Retailing	147	160	13
Fruit and Vegetable Retailing	102	99	-3
Liquor Retailing	90	116	26
Other Specialised Food Retailing	190	158	-32
Other Store-Based Retailing, nfd	23	16	-7
Furniture, Floor Coverings, Houseware and Textile Goods Retailing, nfc	3	4	1
Furniture Retailing	201	126	-75
Floor Coverings Retailing	51	41	-10
Houseware Retailing	31	38	7
Manchester and other Textile Goods Retailing	37	61	24
Electrical and Electronic Goods Retailing, nfd	0	0	0
Electrical, Electronic and Gas Appliance Retailing	215	264	49
Computer and Computer Peripheral Retailing	48	50	2
Other Electrical and Electronic Goods Retailing	26	32	6
Hardware, Building and Garden Supplies Retailing, nfd	3	0	-3
Hardware and Building Supplies Retailing	334	383	49
Garden Supplies Retailing	72	60	-12
Recreational Goods Retailing, nfd	3	0	-3
Sport and Camping Equipment Retailing	51	94	43
Entertainment Media Retailing	11	27	16
Toy and Game Retailing	26	16	-10
Newspaper and Book Retailing	135	125	-10
Marine Equipment Retailing	18	20	2
Clothing, Footwear and Personal Accessory Retailing, nfd	4	0	-4
Clothing Retailing	311	338	27
Footwear Retailing	38	62	24
Watch and Jewellery Retailing	76	97	21
Other Personal Accessory Retailing	23	18	-5
Department Stores	367	363	-4
Pharmaceutical and other Store-Based Retailing, nfd	0	0	0
Pharmaceutical, Cosmetic and Toiletry Goods Retailing	267	360	93
Stationery Goods Retailing	30	29	-1
Antique and Used Goods Retailing	28	31	3
Flower Retailing	32	29	-3
Other Store-Based Retailing nec	286	265	-21
Non-Store Retailing and Retail Commission-Based Buying and/or Selli	4	0	-4
Non-Store Retailing	31	26	-5
Retail Commission-Based Buying and/or Selling	0	9	9
Redland Total	**5,503**	**5,717**	**214**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Accommodation and Food Services - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Accommodation and Food Services, nfd	0	0	0
Accommodation	199	269	70
Food and Beverage Services, nfd	47	30	-17
Cafes, Restaurants and Takeaway Food Services, nfd	0	0	0
Cafes and Restaurants	770	850	80
Takeaway Food Services	920	1,234	314
Catering Services	60	65	5
Pubs, Taverns and Bars	242	192	-50
Clubs (Hospitality)	231	281	50
Redland Total	**2,469**	**2,921**	**452**

1 nfd = Other
Source: Census of Population and housing 2006 and 2011; Urbis

Transport, Postal and Warehousing - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Transport, Postal and Warehousing, nfd	28	37	9
Road Transport, nfd	0	0	0
Road Freight Transport	391	407	16
Road Passenger Transport, nfd	19	20	1
Interurban and Rural Bus Transport	58	0	-58
Urban Bus Transport (Including Tramway)	40	153	113
Taxi and other Road Transport	67	82	15
Rail Transport, nfd	3	0	-3
Rail Freight Transport	0	0	0
Rail Passenger Transport	3	9	6
Water Transport, nfd	24	23	-1
Water Freight Transport	0	0	0
Water Passenger Transport	74	77	3
Air and Space Transport	0	10	10
Other Transport, nfd	0	0	0
Scenic and Sightseeing Transport	12	4	-8
Pipeline and other Transport, nfd	0	0	0
Pipeline Transport	0	0	0
Other Transport, nfd	0	0	0
Postal and Courier Pick-up and Delivery Services, nfd	0	0	0
Postal Services	138	156	18
Courier Pick-up and Delivery Services	43	48	5
Transport Support Services, nfd	0	0	0
Water Transport Support Services, nfd	0	0	0
Stevedoring Services	4	0	-4
Port and Water Transport Terminal Operations	4	6	2
Other Water Transport Support Services	7	19	12
Airport Operations and other Air Transport Support Services	4	0	-4
Other Transport Support Services, nfd	0	0	0
Customs Agency Services	0	0	0
Freight Forwarding Services	9	13	4
Other Transport Support Services, nfd	0	0	0
Warehousing and Storage Services, nfd	0	0	0
Grain Storage Services	0	0	0
Other Warehousing and Storage Services	39	23	-16
Redland Total	**967**	**1,087**	**120**

1 nfd =, nfd
Source: Census of Population and housing 2006 and 2011; Urbis

Information Media and Telecommunications - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Information Media and Telecommunications, nfd	3	0	-3
Publishing (except Internet and Music Publishing), nfd	3	5	2
Newspaper, Periodical, Book and Directory Publishing, nfd	0	0	0
Newspaper Publishing	194	157	-37
Magazine and other Periodical Publishing	20	8	-12
Book Publishing	13	7	-6
Directory and Mailing List Publishing	0	0	0
Other Publishing (except Software, Music and Internet)	0	0	0
Software Publishing	0	0	0
Motion Picture and Sound Recording Activities, nfd	0	0	0
Motion Picture and Video Activities, nfd	0	0	0
Motion Picture and Video Production	3	8	5
Motion Picture and Video Distribution	0	0	0
Motion Picture Exhibition	22	62	40
Post-production Services and other Motion Picture and Video Activities	0	0	0
Sound Recording and Music Publishing, nfd	0	0	0
Music Publishing	0	0	0
Music and other Sound Recording Activities	7	3	-4
Broadcasting (except Internet), nfd	3	0	-3
Radio Broadcasting	0	0	0
Television Broadcasting, nfd	0	0	0
Free-to-Air Television Broadcasting	10	3	-7
Cable and other Subscription Broadcasting	3	7	4
Internet Publishing and Broadcasting	0	4	4
Telecommunications Services, nfd	49	76	27
Wired Telecommunications Network Operation	17	38	21
Other Telecommunications Network Operation	8	20	12
Other Telecommunications Services	0	8	8
Internet Service Providers, Web Search Portals and Data Processing S	0	0	0
Internet Service Providers and Web Search Portals	13	6	-7
Data Processing, Web Hosting and Electronic Information Storage Ser	0	0	0
Data Processing and Web Hosting Services	0	0	0
Electronic Information Storage Services	0	0	0
Library and other Information Services, nfd	0	0	0
Libraries and Archives	19	25	6
Other Information Services	0	0	0
Redland Total	**387**	**437**	**50**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Financial and insurance Services - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Financial and Insurance Services, nfd	29	31	2
Finance, nfd	72	49	-23
Central Banking	0	0	0
Depository Financial Intermediation, nfd	0	0	0
Banking	227	245	18
Building Society Operation	7	15	8
Credit Union Operation	9	5	-4
Other Depository Financial Intermediation	0	0	0
Non-depository Financing	3	13	10
Financial Asset Investing	28	28	0
Insurance and Superannuation Funds, nfd	0	0	0
Life Insurance	6	5	-1
Health and General Insurance, nfd	0	0	0
Health Insurance	13	13	0
General Insurance	44	64	20
Superannuation Funds	3	0	-3
Auxiliary Finance and Insurance Services, nfd	0	0	0
Auxiliary Finance and Investment Services, nfd	6	0	-6
Financial Asset Broking Services	16	13	-3
Other Auxiliary Finance and Investment Services	127	162	35
Auxiliary Insurance Services	19	20	1
Redland Total	**609**	**663**	**54**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Rental, Hiring and Real Estate Services - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Rental, Hiring and Real Estate Services, nfd	0	0	0
Rental and Hiring Services (except Real Estate), nfd	3	11	8
Motor Vehicle and Transport Equipment Rental and Hiring, nfd	3	0	-3
Passenger Car Rental and Hiring	6	11	5
Other Motor Vehicle and Transport Equipment Rental and Hiring	6	9	3
Farm Animal and Bloodstock Leasing	0	0	0
Other Goods and Equipment Rental and Hiring, nfd	0	0	0
Heavy Machinery and Scaffolding Rental and Hiring	70	35	-35
Video and other Electronic Media Rental and Hiring	82	53	-29
Other Goods and Equipment Rental and Hiring, nfd	0	0	0
Non-Financial Intangible Assets (except Copyrights) Leasing	9	5	-4
Property Operators and Real Estate Services, nfd	33	23	-10
Property Operators, nfd	9	0	-9
Residential Property Operators	38	31	-7
Non-Residential Property Operators	53	53	0
Real Estate Services	518	485	-33
Redland Total	**830**	**716**	**-114**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Professional, Scientific and Technical Services - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Professional, Scientific and Technical Services, nfd	0	0	0
Other Professional, Scientific and Technical Services, nfd	0	0	0
Scientific Research Services	102	36	-66
Architectural, Engineering and Technical Services, nfd	19	14	-5
Architectural Services	65	57	-8
Surveying and Mapping Services	52	40	-12
Engineering Design and Engineering Consulting Services	141	218	77
Other Specialised Design Services	65	92	27
Scientific Testing and Analysis Services	20	25	5
Legal and Accounting Services, nfd	0	0	0
Legal Services	146	168	22
Accounting Services	347	414	67
Advertising Services	68	77	9
Market Research and Statistical Services	52	79	27
Management and Related Consulting Services, nfd	3	3	0
Corporate Head Office Management Services	0	0	0
Management Advice and Related Consulting Services	139	226	87
Veterinary Services	85	109	24
Other Professional, Scientific and Technical Services, nfd	0	0	0
Professional Photographic Services	35	44	9
Other Professional, Scientific and Technical Services, nfd	0	0	0
Redland Total	**1,339**	**1,602**	**263**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Administrative and Support Services- 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Administrative and Support Services, nfd	189	0	-189
Computer System Design and Related Services	0	333	333
Administrative Services, nfd	6	0	-6
Employment Services, nfd	0	0	0
Employment Placement and Recruitment Services	99	126	27
Labour Supply Services	73	124	51
Travel Agency and Tour Arrangement Services	65	78	13
Other Administrative Services, nfd	3	3	0
Office Administrative Services	16	29	13
Document Preparation Services	3	15	12
Credit Reporting and Debt Collection Services	10	7	-3
Call Centre Operation	0	16	16
Other Administrative Services, nfd	3	3	0
Building Cleaning, Pest Control and other Support Services, nfd	0	0	0
Building Cleaning, Pest Control and Gardening Services, nfd	0	0	0
Building and other Industrial Cleaning Services	410	444	34
Building Pest Control Services	104	74	-30
Gardening Services	136	183	47
Packaging Services	10	10	0
Redland Total	**1,127**	**1,445**	**318**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Public Administration and Safety - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Public Administration and Safety, nfd	0	3	3
Public Administration, nfd	5	12	7
Central Government Administration	118	120	2
State Government Administration	184	204	20
Local Government Administration	858	816	-42
Justice	4	9	5
Government Representation, nfd	0	0	0
Domestic Government Representation	0	0	0
Foreign Government Representation	0	0	0
Defence	15	4	-11
Public Order, Safety and Regulatory Services, nfd	0	0	0
Public Order and Safety Services, nfd	0	0	0
Police Services	166	184	18
Investigation and Security Services	86	69	-17
Fire Protection and Other Emergency Services	44	60	16
Correctional and Detention Services	3	12	9
Other Public Order and Safety Services	0	10	10
Regulatory Services	3	14	11
Redland Total	**1,486**	**1,517**	**31**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Education and Training - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Education and Training, nfd	90	48	-42
Preschool and School Education, nfd	0	13	13
Preschool Education	111	69	-42
School Education, nfd	37	26	-11
Primary Education	1,190	1,394	204
Secondary Education	676	750	74
Combined Primary and Secondary Education	400	595	195
Special School Education	74	76	2
Tertiary Education, nfd	3	3	0
Technical and Vocational Education and Training	252	197	-55
Higher Education	20	37	17
Adult, Community and other Education, nfd	6	0	-6
Sports and Physical Recreation Instruction	67	103	36
Arts Education	72	76	4
Adult, Community and other Education nec	157	181	24
Educational Support Services	3	6	3
Redland Total	**3,158**	**3,574**	**416**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

Health Care and Social Assistance - 4 Digit ANZSIC

REDLAND CITY

Industry	2006	2011	2006-2011 Growth No.
Health Care and Social Assistance, nfd	117	145	28
Hospitals, nfd	0	0	0
Hospitals (except Psychiatric Hospitals)	752	1,169	417
Psychiatric Hospitals	0	0	0
Medical and other Health Care Services, nfd	126	78	-48
Medical Services, nfd	0	0	0
General Practice Medical Services	328	354	26
Specialist Medical Services	49	70	21
Pathology and Diagnostic Imaging Services	87	103	16
Allied Health Services, nfd	0	0	0
Dental Services	165	225	60
Optometry and Optical Dispensing	74	92	18
Physiotherapy Services	48	72	24
Chiropractic and Osteopathic Services	20	35	15
Other Allied Health Services	161	239	78
Other Health Care Services, nfd	0	0	0
Ambulance Services	47	88	41
Other Health Care Services, nfd	0	0	0
Residential Care Services, nfd	0	0	0
Aged Care Residential Services	892	1,080	188
Other Residential Care Services	21	27	6
Social Assistance Services, nfd	88	86	-2
Child Care Services	565	730	165
Other Social Assistance Services	285	479	194
Redland Total	**3,825**	**5,072**	**1,247**

1 nfd = Other

Source: Census of Population and housing 2006 and 2011; Urbis

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