FORESIGHT PARTNERS

ECONOMIC NEED AND IMPACT ASSESSMENT

INTEGRATED HEALTH & EDUCATION PRECINCT DESIGNATION

HUB68 CENTRE OF EXCELLENCE – AGING & WELLNESS

58-68 DELANCEY STREET, ORMISTON

PREPARED FOR:

THE HUB PRECINCT PTY LTD

Ref: 20007

OCTOBER 2022

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EXECUTIVE SUMMARY

The Hub Precinct Pty Ltd proposes the designation of an Integrated Health & Education Precinct, consisting of a private hospital, medical consulting suites, research and education facility, residential aged care, and ancillary retail. This report has considered the site's full development potential which also includes childcare, independent living and a community hub which will be assessed at a future date via the DA process.

The proposal includes the following uses:

Use	Facilities/Size
Private Hospital	146 beds, 14 theatres, and associated facilities
Day Hospital	18 beds and associated facilities
Office	Medical consulting rooms
Aged Care	90 beds and associated facilities
Retirement Independent Living Units	200 ILUs and associated facilities
Childcare Centre	150 places
Retail	Ancillary retail to support on-site services/visitors.
Aging Research Institute	
Ancillary	Community Group Hub

The 5.18 hectare subject site is located at the corner of Delancey Street and Finucane Road, Ormiston and is split zoned as Low Impact Industry and Recreation and Open Space. A medical centre is currently located on-site and will be retained, and around 61% of the site is vacant.

Foresight Partners was commissioned to prepare this economic need and impact assessment for the proposed development.

Regional Overview

The Redland City Local Government Area (LGA) is forecast to grow from a population of around 161,730 at June 2021 to around 193,270 by 2041. A significant and growing proportion of the region's population are aged 50+, which is likely to increase demand for medical, retirement and aged care facilities.

The Health Care and Social Assistance industry is the largest employing sector for Redland City residents, with around 16.1% of residents employed in this sector at June 2021. This proportion is expected to increase in the future.

Existing Network

It is acknowledged that a Redlands Health and Wellness Precinct (RHWP) master plan study is currently being undertaken. However, in view of the timing, funding and development uncertainties, the RHWP cannot be relied upon to provide additional medical services in the region in the next few years, if at all.

Redland City currently has one public (172 beds) and one private hospital (60 beds) both located at Weippin Street, Cleveland. One day surgery is located in the region (at Birkdale), in addition to day surgery facilities available at the Redland Mater Private Hospital. As at June 2020, there were approximately 181 medical specialists and clinicians in the region.

There are currently 16 residential aged care facilities in the Redland City region supplying a total of 1,706 places. There are an additional 126 aged care places approved for development in the region.

There is a total of 19 retirement and over 50s lifestyle villages in the Redland City region, offering a total of 2,071 independent living units (ILUs). A future supply of 1,113 ILUs are proposed or approved for development in the region.

There are 13 existing long day care (LDC) childcare centres providing a total of 1,037 places within five kilometres by road from the subject site. None of these centres are within reasonable walking distance from the subject site to serve on-site workers.

There is a Neighbourhood Centre offering retail facilities opposite the subject site at the corner of Delancey Street and Shore Street West. Further east, there is a substantial mixed-use precinct along Shore Street West containing an IGA supermarket, a number of fast food outlets and large format retailers. The Cleveland Principal Centre is located around 1.5 kilometres east of the subject site.

Demand

Based on the benchmark provision of hospital facilities and medical specialists at the Queensland level, there is estimated current demand for around 230 private hospital beds, 24 day surgery beds and 395 medical specialists in the Redland City region (as at June 2021). Demand is forecast to increase with population growth to around 409 private hospital beds, 53 day surgery beds and 872 medical specialists by 2041.

Based on the benchmark provision of residential aged care services and retirement living facilities at the regional level, there is estimated current demand for around 1,815 aged care places and 2,209 retirement ILUs in the Redland City region (at June 2021). Demand is forecast to increase to 3,393 aged care places and 6,106 retirement ILUs by 2041.

The proposed childcare centre and retail facilities will primarily cater to on-site workers, residents and visitors. Given this, potential impacts on existing retail and childcare facilities nearby are likely to be minimal.

Potential Impacts and Alternative Sites

The subject site represents around 2.7% of the total supply of Industry zoned land and around 0.3% of the total supply of Recreation and Open Space zoned land in the region. Therefore, it is concluded that the minor loss of the subject site as Industry and Recreation and Open Space zoned land is little cause for concern and will not have a significant adverse impact on the supply of land in these zonings.

The only logical and realistic alternative location where the subject proposal (or a new private hospital) could be located is at 21-32 Weippin Street. However, this site is identified as koala habitat by local and state governments and may face significant development constraints and delays.

Need and Community Benefits

Need for the proposed development is demonstrated by the following:

- The Redland City region has a current (at June 2021) undersupply of around 170 private hospital beds and an undersupply of around 14 day surgery beds. This is forecast to increase with population growth to an undersupply of around 350 private hospital beds and 33 day surgery beds by 2041. This is in addition to demand for public hospital facilities.
- There is a current estimated shortfall of around 210 medical specialists in Redland City (as at June 2021). This is forecast to increase to a shortfall of around 305 by 2031, and 468 by 2041.
- There is a current estimated shortfall of around 201 aged care places in Redland City (as at June 2021). By 2026, Redland City will have an estimated undersupply of 433 aged care places. This is forecast to increase with population growth to an undersupply of 882 places by 2031, and 1,561 places by 2041.
- Redland City LGA has a current (at June 2021) undersupply of around 138 retirement ILUs. This is forecast to increase to an undersupply of 843 ILUs by 2031, and 2,922 ILUs by 2041.
- This assessment demonstrates an immediate need for additional private hospital, day surgery and medical specialist facilities in the region. As discussed in Section 3.1, the Redlands Health and Wellness Precinct (RHWP) is still in the master planning stage and cannot be relied upon to provide additional medical services in the region in the next few years, if at all (due to timing, planning and funding uncertainties).
- Should the RHWP be developed in the future, it will serve a complementary function by providing additional and complementary medical services relative to the subject proposal. Furthermore, there will be sufficient need and future demand for medical services to support both the RHWP and the proposal.
- Forecast growth in demand for private hospital facilities is more than sufficient to support both the existing private hospital and the subject proposal. Therefore, adverse impacts on the existing private hospital are likely to be minimal.
- Given the regional undersupply of the facilities proposed, potential adverse impacts on existing medical, retirement and aged care facilities are likely to be negligible.
- Given the size of the future on-site workforce, retail and childcare facilities are required to adequately cater to workers' needs. As these facilities would cater primarily to demand generated by on-site workers, residents and visitors, potential impacts on existing facilities nearby would be minimal.
- The subject site represents less than 3% of the total quantity of Industry zoned and around 0.3% of Recreation and Open Space zoned land in the region. Furthermore, the subject site is not a strategically important location for either of these designations and therefore the potential impacts in terms of the loss of Industry and Recreation and Open Space zoned land are likely to be negligible.

- Although not appropriately zoned, the subject site adjoins other non-residential uses along Shore Street/Finucane Road affording minimal separation distance and isolation.
- There are substantial synergistic benefits of co-locating the proposed uses on the subject site. For example, the proximity of retirement and aged care residents to medical services, and the linkages between the proposed research facility and hospital.
- The proposed development will support the objectives and address the industry issues and gaps identified in the Redland City Council Health Care and Social Assistance Industry Sector Plan. Specifically, the proposal will support training and educational opportunities for the current and future Health Care and Social Assistance workforce, enable collaboration across industry sectors, improve residents' access to better local health and aged care services and address the identified shortage of medical and allied health professionals.
- The only suitably zoned alternative site that could realistically accommodate the proposal (or a private hospital) is at 21-32 Weippin Street, adjoining the Redland Public and Mater Private Hospitals. This site has numerous and significant development constraints and is therefore an inappropriate alternative location for the proposal.

Community and regional benefits of the proposed development include the following:

- Employment generation – The proposal is forecast to generate around 2,880 direct and indirect full-time equivalent (FTE) job years[1] and contribute around $355 million directly and indirectly to Gross Regional Product in the construction phase. It is estimated that the proposal would provide around <u>803 FTE jobs</u> in the operational phase.
- The development would provide the opportunity to recapture a portion of the Redland City resident workforce that currently leave the region for work. As at the 2021 Census, an estimated 37,183 (or around 48%[2] of total employed residents) Redland City residents were employed in the Brisbane City, Logan City and Gold Coast City LGAs.
- The proposal would provide employment and training opportunities that align with the skills of the Redland City resident workforce, specifically in the Healthcare and Social Assistance industry. As at the 2016 Census, around 51% of Redland City residents that were employed in the Health Care and Social Assistance, were employed outside the region.
- The proposal will provide:

[1] One FTE job year is the equivalent of one persons employed full-time for one year.

[2] Excludes inadequately described and not stated.

- a new major medical precinct with modern and high quality facilities to meet the needs of the region's residents in a location that is both convenient and accessible.
- Increased choice and variety in medical, retirement and aged care facilities in the region.
- a community hub to encourage and enhance social and community interaction.
- Additional medical services co-located with an established medical centre which will allow linkages between the existing and proposed uses and synergistic benefits.

- The location of the proposal outside the Weippin Street precinct will reduce congestion and access constraints for medical and health services in the region.

Conclusion

From our investigations and analyses, Foresight Partners concludes that there is a current and increasing need for the proposed development, which will generate significant community benefits. Development of the proposal is unlikely to materially impact existing medical, aged care, retirement, childcare or retail facilities.

1. INTRODUCTION

1.1 Proposed Development and Local Context

The Hub Precinct Pty Ltd proposes the designation of an Integrated Health & Education Precinct, consisting of a private hospital, medical consulting suites, research and education facility, residential aged care, and ancillary retail.

This report has considered the site's full development potential which also includes childcare, independent living and a community hub which will be assessed at a future date via the DA process.

Preliminary plans indicate that the proposal will include the following uses presented in Table 1.1.

Table 1.1: Components of Proposed Development, 58-68 Delancey Street

Use	Facilities/Size
Private Hospital	146 beds, 14 theatres, and associated facilities
Day Hospital	18 beds and associated facilities
Office	Medical consulting rooms
Aged Care	90 beds and associated facilities
Retirement Independent Living Units	200 ILUs and associated facilities
Childcare Centre	150 places
Retail	Ancillary retail to support on-site services/visitors.
Aging Research Institute	
Ancillary	Community Group Hub

Source: Cleveland Rural Pty Ltd, Vision1 Architects and Foresight Partners.

The proposed hospital, day surgery, medical specialist consulting rooms and research facility will be clustered due to the complementary functions and uses. Retail facilities are likely to consist primarily of a mix of food and beverage outlets, and convenience retail, and services to cater to on-site residents, workers and visitors.

The proposed aged care facility will offer varying levels of care in a modern and high-quality establishment. The proposed retirement ILUs will provide a high degree of amenity with associated facilities such as a function hall, theatre, pool. Preliminary discussions with the applicant indicate that the proposed retirement living facility may target the Chinese and/or Asian retirement market specifically.

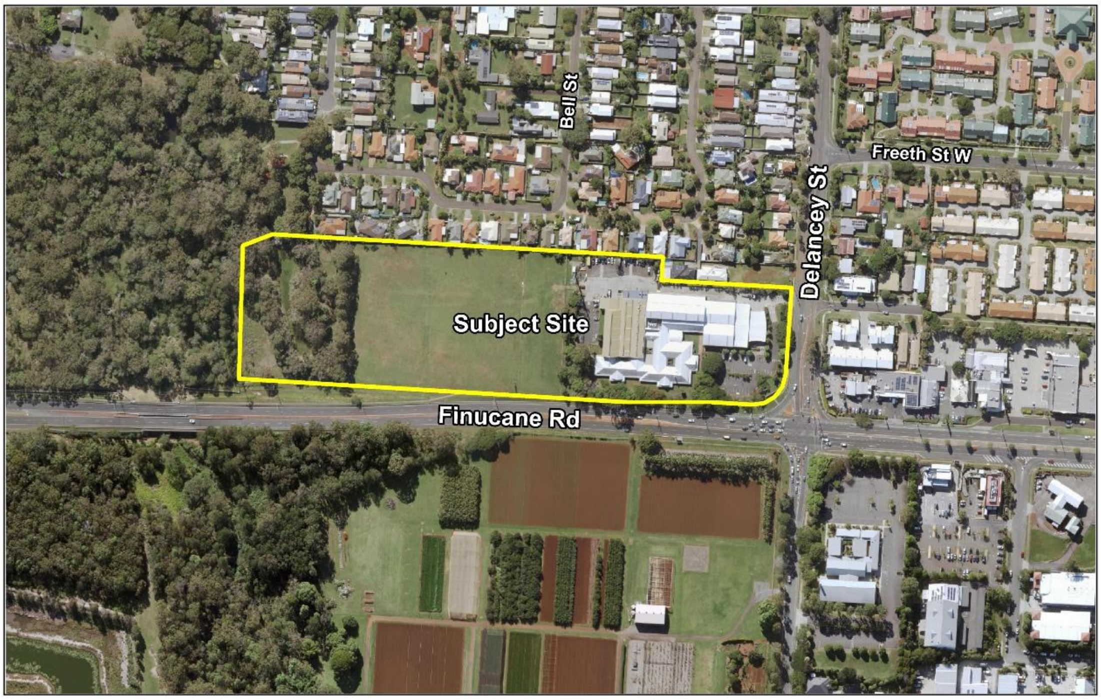
The ultimate use of the proposed research facility has not yet been finalised, however initial discussions with the applicant indicate the facility will likely target research areas related to medical/health services for the aging and how technology can assist with medical treatment and diagnosis. Furthermore, linkages will be made with the on-site childcare centre to study the benefits of intergeneration interaction between child and aged care.

Subject Site and Local Context

The subject site comprises several allotments (0/SP308738; 0 – 2/SP308739; 0/SP308740; 4/SP308740; 10 – 16/SP314782) totaling 5.18 hectares and is split zoned as Light Industry and Recreation and Open Space. Part of the site was formerly occupied by Fairfax Media's printing plant, which has since been repurposed as a medical centre and sign manufacturing business. Approximately 3.17 hectares (61.2%) of the subject site is vacant.

Figure 1.1 shows an aerial view of the subject site and its surroundings. Mixed-use development is located to the east of the site which includes a range of retail and commercial facilities and low to medium density residential development is located to the north. The Queensland Government Redlands & QCDF Research Facility is located on Delancey Street to the south and conservation land adjoins the subject site to the west.

Figure 1.1: Aerial View of Subject Site and Surroundings, 58-68 Delancey Street, Ormiston



Source: Queensland Globe, Foresight Partners.

1.2 Purpose of Report and Methodology

Foresight Partners was commissioned to prepare this economic need and impact assessment for the proposed development. The primary objectives of this assessment are to:

- assess the need for the proposed uses in terms of supply and demand;
- evaluate the potential economic impacts of the proposal; and
- assess the community need for the proposed development, and the potential benefits accruing to the local and regional community.

In preparing this report, a number of investigations were undertaken. These included:

- a reconnaissance of Ormiston, Cleveland and surroundings areas, noting the position of the subject site, its accessibility, and surrounding land uses;

- presentation and analysis of Queensland Government population projections for the Redland City LGA rebased to align with the latest ABS population estimates, and discussion of notable growth areas;
- extraction and examination of the socio-economic characteristics of Redland City LGA residents and households as at the 2016 and 2021 Censuses and their implications with respect to demand for the proposed facilities;
- examination of the regional employment profile and working population;
- identification and mapping of public and private hospitals, day surgeries and medical specialists in the region;
- identification of existing retirement and aged care facilities in Ormiston and Cleveland noting their size, location and other characteristics;
- definition of service areas for the proposed retirement, aged care and medical facilities, based upon the location of existing facilities, their size and composition, the road network, topography and other factors;
- estimation of the likely future demand and need for hospital, medical, retirement and aged care facilities in the region;
- estimation of the likely workforce demand and need for a childcare centre on the subject site;
- assessment of the proposed development's potential impacts in terms of the loss of Industry zoned land in the region;
- identification and analysis of suitably zoned potential alternative sites where the proposed development could be located;
- estimation of the likely number of full-time equivalent jobs that the proposed development would provide in the construction and operational phases; and
- assessment of need and community benefits of the proposed development.

These investigations provided the basis for this economic need and demand analysis.

2. REGIONAL OVERVIEW

2.1 Population

Redland City is currently the tenth largest Local Government Area (LGA) in Queensland by population. By 2041, the region's population is forecast to reach approximately 193,270 residents, representing an average annual growth rate of around 0.9% per annum between 2021 and 2041 (Table 2.1). By comparison, Queensland is projected to experience an average annual growth rate of 1.54% over the same period.

Table 2.1: Estimated Resident Population, Redland City and Surrounding LGAs, 2016 to 2041

LGA	2016	2021	2026	2031	2036	2041	Incr. 2021-41
Redland City	151,987	161,730	171,754	180,069	186,460	193,270	31,540
Brisbane City	1,184,215	1,264,024	1,329,818	1,392,125	1,468,942	1,545,402	281,378
Gold Coast City	576,918	633,764	704,887	776,727	848,361	919,794	286,030
Logan City	313,785	350,740	392,782	441,154	501,076	554,586	203,846
Queensland	**4,848,877**	**5,217,653**	**5,670,846**	**6,146,420**	**6,618,813**	**7,085,784**	**1,868,131**

Source: Foresight Partners' rebased estimates based on ABS Regional Population Growth (released July 2022) and growth rates of Queensland Government Statistician's Office (QGSO) Population Projections, Medium Series, 2018 Edition.

Major development projects that are likely to drive substantial population growth in the Redland City region include:

Toondah Harbour

Toondah Harbour, located in eastern Cleveland, was declared a Priority Development Area (PDA) in 2013. Walker Group have released a preliminary master plan for the area which includes an estimated 6,300 residents in 3,600 dwellings, a redeveloped port and ferry facility, recreational marina, boutique retail and dining precinct, hotel and convention facilities and large areas for parkland and conservation. The project is currently in the environmental impact assessment stage and final planning approvals are yet to be secured.

Weinam Creek

Council-owned subsidiary Redland Investment Corporation have prepared a preliminary master plan for the Weinam Creek PDA that includes a mixed-use retail and dining precinct, additional car parking including a multi-deck facility, rejuvenation of existing parkland and low to high density residential development. In December 2021, the master plan for the mixed-use village (which encompasses much of the PDA) was approved by EDQ (DEV2020/1143).

Shoreline

Located in the southern Redland Bay area, the 262 hectare Shoreline development is planned to ultimately include 10,000 residents in 3,000 new dwellings, retail and dining facilities and a large foreshore park. Redland City Council granted Preliminary Approval of the Shoreline Master Plan in 2015. The first residential precinct, 'Elements', is under construction.

These projects and others, along with infill development, will drive a forecast increase of over 31,000 new residents in the Redland City region between 2021 and 2041, and are considered in the population projections presented in this report.

Forecast Population Aged 50+

Compared to neighbouring LGAs, Redland City had among the highest proportion of residents aged 50+ (66,280 persons or 41%) at June 2021 (Table 2.2). This proportion is forecast to grow significantly over the 25 years to 2041, increasing to 47.4% by 2041, which is a greater proportion than any neighbouring LGA.

Table 2.2: Forecast Population Aged 50+, Redland City and Surrounding LGAs, 2016 to 2041

LGA	2016	2021	2026	2031	2036	2041
Redland City	57,152	66,281	74,408	80,548	86,151	91,589
(% of total)	*37.6%*	*41.0%*	*43.3%*	*44.7%*	*46.2%*	*47.4%*
Brisbane City	332,500	372,898	407,580	436,975	477,143	518,107
(% of total)	*28.1%*	*29.5%*	*30.6%*	*31.4%*	*32.5%*	*33.5%*
Gold Coast City	193,851	224,605	256,047	286,539	321,290	358,191
(% of total)	*33.6%*	*35.4%*	*36.3%*	*36.9%*	*37.9%*	*38.9%*
Logan City	88,586	102,583	120,404	139,652	164,903	188,886
(% of total)	*28.2%*	*29.2%*	*30.7%*	*31.7%*	*32.9%*	*34.1%*
QLD	1,582,695	1,816,293	2,039,985	2,248,662	2,485,009	2,728,847
(% of total)	*32.6%*	*34.8%*	*36.0%*	*36.6%*	*37.5%*	*38.5%*

Source: Foresight Partners' estimates based on Table 2.1 and QGSO Population Projections, Medium Series, 2018 Edition by age by sex.

The notable increase in the proportion of residents aged 50+ is likely to result in greater demand for retirement, aged care and medical and health services in the Redland City region.

2.2 Socio-economic Characteristics

A summary of selected key socio-economic characteristics for residents and households in the Redland City LGA as at the 2021 Census is shown in Table 2.3. Data for Queensland is included as a benchmark.

Key differences between Redland City LGA and the benchmark areas as at the 2021 Census include:

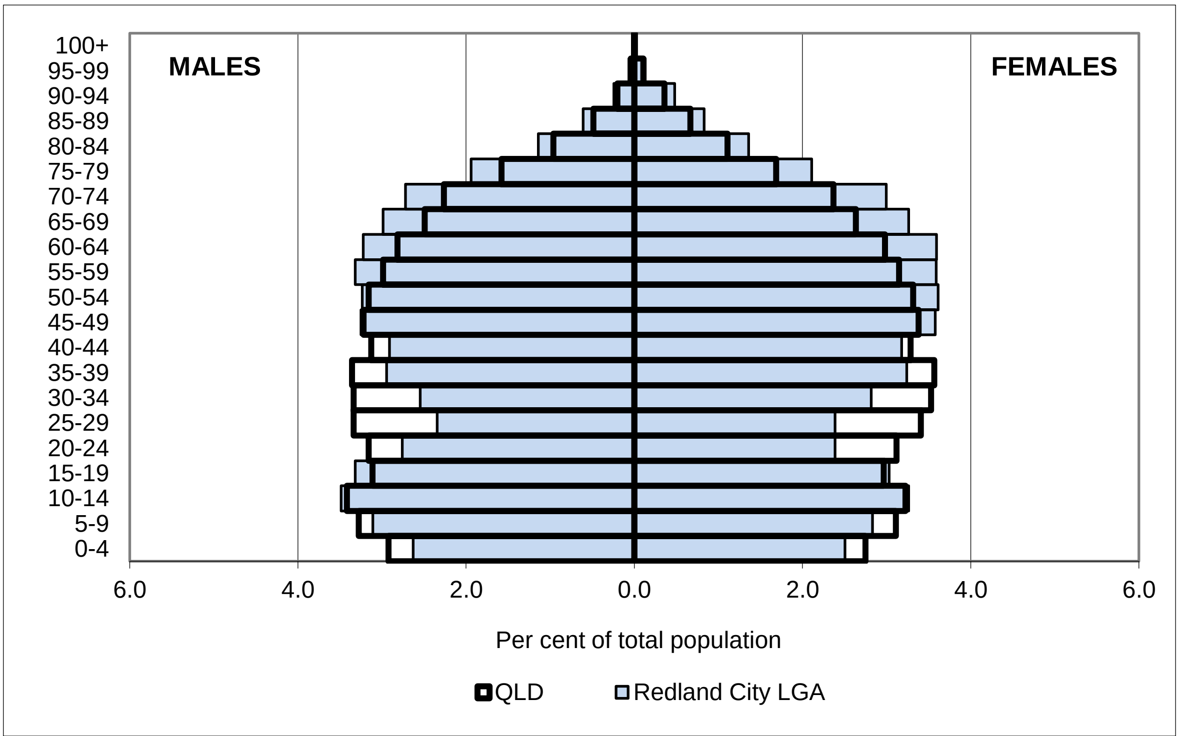
- A higher proportion of Redland City residents were aged 55 and over (34.6%) compared to Queensland (28.9%);
- A slightly lower proportion of Redland City residents were in the labour force (64.1%) compared to Queensland (65.8%);
- Average annual household income in Redland City ($121,729) is slightly above that of Queensland ($117,932);
- Dwellings in Redland City LGA are predominately detached and make up a higher proportion of total occupied dwellings (84.0%) compared to Queensland (75.0%);

- A low proportion of Redland City households are renting (23.2%), meaning that most own their home outright (34.2%) or are in the process of purchasing it (40.4%);
- Redland City households are highly mobile with 63.9% owning two or more cars compared to 58.4% in Queensland;
- Couples without children at home make up a higher proportion of Redland City households (30.9%) compared to Queensland (28.6%);
- Average household size in Redland City (2.58) is slightly above the state level (2.53); and
- Long-term health conditions are more prevalent in Redland City with 37.2% of residents identified with at least one long-term condition, compared to 32.9% of Queensland residents.

These key characteristics reflect the nature of Redland City as a mix of young families in developing areas and older long-term residents in well-established neighbourhoods.

Figure 2.1 presents a graphical illustration of the distribution of residents by age group and sex in Redland City LGA compared to Queensland as at the 2021 Census. Redland City had a lower proportion of residents in the 20 to 39 age group, and a higher proportion aged between 55 and 79 compared to Queensland.

Figure 2.1: Age-Sex Pyramid, Redland City LGA and Queensland, 2021



Source: ABS Census 2021 via Tablebuilder.

Table 2.3: Summary of Selected Socio-economic Characteristics, Redland City LGA, 2021

	Redland City LGA	QLD
Age (% residents)		
0-9 (Gen Alpha)	11.1	12.1
10-24 (Gen Z)	18.2	19.0
25-39 (Millennials/Gen Y)	16.3	20.5
40-54 (Gen X)	19.8	19.5
55-74 (Baby Boomers)	25.7	21.7
75+ (Interwar Gen)	8.9	7.2
Average Age (Years)	41.9	39.3
Employment (%)		
In labour force	64.1	65.8
Unemployed	4.4	5.4
White collar occupations	68.6	68.8
Employed per household (persons)	1.31	1.31
Household Income		
Average ($2022 values)	$121,729	$117,932
Dwelling Structure (% households)		
Detached	84.0	75.0
Semi-detached	11.4	11.7
Flats/units	4.4	12.5
Other structure	0.3	0.7
Dwelling Tenure (% households)		
Owned	34.2	29.5
Purchasing	40.4	35.0
Renting	23.2	33.6
Average Annual Occupancy Cost - Mortgages	$26,634	$25,166
Average Annual Occupancy Cost - Rentals	$22,762	$21,193
Mobility (% households)		
No car	4.6	5.8
1 Car	31.6	35.8
2 or more cars	63.9	58.4
Avg. Vehicles per Household (no.)	1.92	1.80
Education (% persons Aged 20+)		
Bachelors Degree	14.0	16.2
Grad Dip/Grad Cert	2.3	2.4
Postgraduate Degree	3.7	5.1
Family Type (% households)		
Couples with Children	32.2	29.3
Couples without Children	30.9	28.6
Single Parent Household	11.7	12.0
Lone Person Household	21.9	24.7
Group/Other Household	3.3	5.5
Avg. Household Size (persons)	2.58	2.53
Ethnicity (% residents)		
Only English spoken at home	92.1	85.6
Health Indicators (% residents)		
Persons with a Long Term Health Condition	37.2	32.9
Persons with 2 or more Long Term Health Conditions	11.1	9.5

Source: ABS Census 2021.

2.3 Employment

2.3.1 Resident Employment Profile

Appendix 1 sets out the resident employment profile by industry for Redland City LGA and Queensland as at the 2016 and 2021 Censuses.

Between 2016 and 2021, notable changes in Redland City LGA's resident employment profile include:

- Only minor decreases in residents employed in the Agriculture, Wholesale Trade, Information Media and Telecommunications, Rental, Hiring and Real Estate Services, and Arts and Recreation Services sectors; and
- Significant increases of 1,112 and 2,418 residents employed in the Construction and Health Care and Social Assistance industries respectively.

Key differences between Redland City LGA and Queensland's employment profiles as at the 2021 Census include:

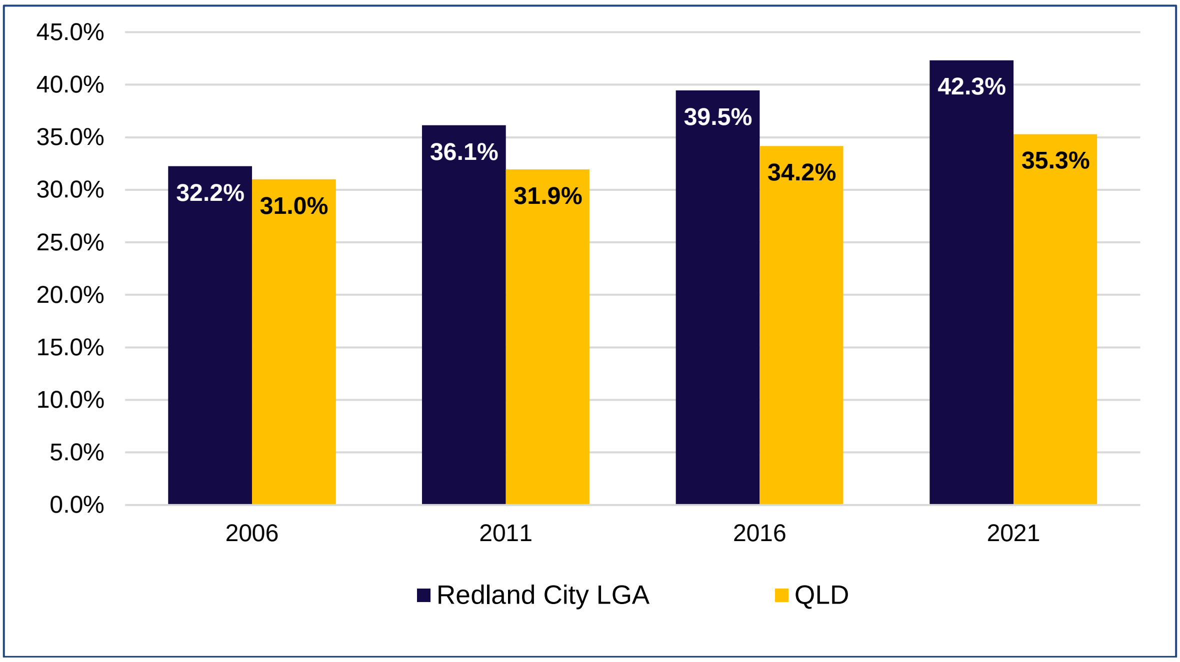
- A slightly lower proportion of Redland City residents work in the Health Care and Social Assistance industry (15.4%) compared to Queensland (16.1%); and
- In Redland City, around 30.5% of residents are employed in Industrial sectors compared to 24.2% for Queensland.

These changes suggest a general trend in Redland City of increasing resident employment in service Industries, particularly Health Care and Social Assistance, and a decreasing proportion of resident employment in Industrial sectors.

2.3.2 Full-time Vs. Part-time

The majority of employed Redland City residents work full-time, however the proportion of residents in part-time positions has been increasing over the past 15 years (Figure 2.2). Between 2006 and 2021, this proportion has increased from 32.2% to 42.3% in the Redland City LGA. By comparison, part-time resident employment has increased from 31.0% to 35.3% (of total employment) in Queensland over the same period. Factors driving an increase in part-time employment include business demands for a flexible workforce, an aging workforce, worker choice, and a lack of full-time opportunities.

Figure 2.2: Part-Time Employment as Percentage of Total Employment, 2006 to 2021



Source: ABS Census 2006, 2011, 2016, 2021, accessed via ABS Tablebuilder.

2.3.3 Historic and Projected Jobs

Table 2.4 sets out the actual and projected jobs for the Redland City LGA based on data from the ABS Census, Shaping SEQ Regional Plan and the Redland City Council Local Government Infrastructure Plan (LGIP).

Between the 2011 and 2021 Censuses, the number of jobs in Redland City LGA increased by 9,580, from 35,470 jobs to 45,047 jobs.

Employment projections in the Shaping SEQ Regional Plan are based on projections prepared by the Queensland Treasury in 2015. Evidently, when compared to 2016 and 2021 Census data, these projections are overstated and are likely an over-optimistic view of future employment in Redland City LGA.

Conversely, Redland City Council employment projections are slightly lower (around 11.4% lower) compared to the 2021 Census. In our opinion, the LGIP projections are likely to understate future employment growth in the region.

Table 2.4: Actual and Projected Jobs, Redland City LGA, 2011 to 2041

	2011	2016	2021	2026	2031	2036	2041	Ultimate
ABS Census	35,467	40,568	45,047	N/A	N/A	N/A	N/A	N/A
Shaping SEQ Regional Plan 2017	44,781	47,285	52,176	56,736	61,164	65,168	69,194	N/A
Redland City Council LGIP	N/A	37,554	39,910	42,665	45,294	N/A	N/A	50,599

Source: ABS Census 2011, 2016, 2021, Shaping SEQ Regional Plan 2017, Redland City Council LGIP 2018.

3. SUPPLY NETWORK

This section presents an overview of the existing regional and local network of medical and health services, aged care, retirement and other facilities relevant to the proposed development.

3.1 Hospitals, Medical and Health Services

3.1.1 Studies and Planning Instruments

Health Care and Social Assistance Industry Sector Plan

Redland City Council has developed a Health Care and Social Assistance Industry Sector Plan (the plan) for the period 2018 to 2023 which identifies the health industry's growing workforce and significant contribution to the regional economy.

The plan specifically acknowledges the importance of collaboration within the Health Care and Social Assistance sector and its objectives are to:

- *"Drive initiatives that attract strategic investment opportunities in the sector*
- *Enhance business capacity through workshops and training opportunities*
- *Continue to develop and maintain strong partnerships with the business community and other levels of government*
- *Support training and educational opportunities for the current and future health care and social assistance workforce*
- *Enable collaboration within and across industry sectors that will improve efficiencies and supply chain links*
- *Enhance international linkages through existing Redland's sister and friendship city relationships*
- *Advocate for funding for health care infrastructure and services in the City*
- *Improve residents' access to better local health, aged care and home care services."*

Furthermore, the plan identifies key issues and gaps in the health industry regional infrastructure and workforce which should be addressed, and potential opportunities to take advantage of.

Industry Issues and Gaps

To facilitate the success of the Plan, there are some identified issues and gaps.

Health, Aged and Social Assistance Services and Infrastructure	Industry Workforce
• Local hospitals only have capability to care for low to moderate risk patients. Patients with more complex needs are transferred to larger hospitals • Limited capacity to meet increasing demand for health services due to the size of hospital facilities • Limited capacity to provide emergency, medical, survival, neonatal, mental health and sub and non-acute services • Limited opportunities to incorporate teaching and research • Limited public transport options to the hospital precinct • Single road access to the hospital sites and significant undersupply of car parking • Limited availability of general practice clinics that are open late evening and on weekends • Consolidation of services due to impact of customer driven care • Service gaps in high health needs areas particularly in the City's island communities • Limited supported accommodation, transitional care and respite care	• Shortage of general practitioners • Shortage of private medical specialists including anaesthetists, cardiologist, general surgeons, ophthalmologists and medical oncologists • Casualisation of workforce • Workforce deficits in allied health services (physiotherapists, podiatrists, occupational therapists) • Increased demand for training and education of workforce to meet future needs

It is important to note that addressing these issues and gaps will require working in partnership with the Redlands Health Care and Social Assistance industry sector, business, community and the State and Federal Governments.

Redland City Opportunities

The following provides an overview of the Health Care and Social Assistance opportunities identified for the Redlands.

Infrastructure and Partnership Opportunities	Workforce and Business Development Opportunities
• Collaboration between public hospitals and educational institutes • Partnerships between public hospitals and private health service providers to address service gaps and efficiencies • Co-location opportunities with private clinics particularly in the Redlands Health and Wellness Precinct • Explore the development of a Centre of Excellence in Education for the Ageing • Capitalise on the growth of the use of digital technology for health and aged care • Develop an investment attraction strategy for the industry	• Partnership with TAFE and training providers to facilitate aged care and disability sector education to upskill workforce • Organise summits that can be a platform for health care and social assistance industries to engage and network • Support existing networks of aged care and community service organisations to improve access to information and coordination of services • Business support through workshops and training opportunities • Work with international partners to identify and develop opportunities and attract investment

Source: Redland City Council Health Care and Social Assistance Industry Sector Plan 2018-23, page 17.

The key objectives of the plan, and issues and gaps identified, align closely with the opportunity presented by the proposed development. Specifically, the shortage of private medical specialists, workforce deficits and the limited capacity to meet increasing demand for health services.

Redlands Coast Age-Friendly Action Plan

Redland City Council has also released an age-friendly action plan 2021-2026 to guide Council's policies to enable older residents to live healthy and active lifestyles while participating in the community.

Key themes and outcomes of the action plan include:

- **Outdoor spaces and buildings –** accessible for all ages;
- **Transport –** improved transport for the elderly;
- **Housing –** a range and variety of housing choice;
- **Respect and Social Inclusion –** inclusion of elders in the community;
- **Social Participation –** participation in community activities;

- **Civic Participation and Employment –** participation in work and volunteering;
- **Communication and Information –** accessibility of information;
- **Community Support and Health Services** – improved access and availability of health and related support services;

The subject proposal will align with many of these key pillars through the following:

- **Housing:** The proposal will provide a range of housing choices for the elderly including retirement living units and residential aged care which will be located proximate to public transport services. Improvements to housing options will support aging within the region for the residents of Redland City. Importantly, these housing options will be co-located with health care services, small-scale retail, research, and other related uses.
- **Respect and Social Inclusion** and **Social Participation:** Upon completion, the proposed development will foster community connection through integrated social and communal spaces and activities. There is potential for intergenerational social programs through the delivery of an onsite childcare centre. Research partnerships would also be facilitated through the proposal with the establishment of a research institute focused on aging, health care, and technological benefits.
- **Civic Participation and Employment:** There may be potential for on-site employment or volunteering opportunities for elderly residents within the now-approved educational establishment (Australian Industry Trade College) or other uses onsite.
- **Community Support and Health Services:** The onsite health care facilities and specialists will cater to the increasingly complex health needs of older residents. As identified later in this report, there is a significant forecast shortfall of medical specialists in the region and development of the proposal will seek to address this (in part). The establishment of a private hospital, medical specialist consulting space, allied health, and other related uses will provide substantial benefit to residents of all ages in the Redland community.

Redlands Health and Wellness Precinct

It is acknowledged that a Redlands Health and Wellness Precinct (RHWP) master plan study is currently being undertaken by Redland City Council in collaboration with Mater and Metro South Health. This precinct is planned to be developed in the Specialised Centre zone around Weippin Street, Cleveland.

The RHWP will incorporate the planned expansion of the Redland public and private hospitals and medical specialist services, supporting infrastructure, education and training facilities, and identification of potential industry clustering opportunities around the hospitals[3]. The RHWP is planned to be Redland City's major health hub, providing high-order medical facilities to service the entire region, while generating significant employment and training opportunities and economic output.

[3] Redland City Council Health Care and Social Assistance Industry Sector Plan 2018-23, page 19.

The master planning process has been underway for a number of years and no draft or final plan has been released. In view of this, and the proposed scale of the project, it is expected that it will realistically be at least five years, and likely longer, before even an initial stage of the RHWP opens (assuming it proceeds).

A 2022 federal election advocacy document (*Let's Collabor8*) released by Redland City Council in April 2022 states that *"Council is seeking commitment for the Federal Government to partner with Council and the State Government on the next stage of the planning process [of the RHWP], including providing funding to assist with project delivery".*

In view of this statement, it appears the RHWP is still in the planning phase and no funding for development/delivery has been allocated. In our opinion, the RHWP cannot be relied upon to provide substantial additional medical services in the region in the next few years, if at all.

3.1.2 Existing Supply

Public and Private Hospitals

Table 3.1 sets out the existing public and private hospitals in Redland City LGA and nearby in order of drive distance from the subject site and their locations are shown in Figure 3.1.

The two nearest hospitals to the subject site are Redland Hospital (public) and Redland Mater Private Hospital at Weippin Street, Cleveland. These two hospitals provide a combined 232 beds. After these, the nearest hospitals are at Belmont and Coopers Plains, more than 15 kilometres by road from the subject site.

A $62 million Stage 1 refurbishment of the Redland Hospital was announced in September 2020, which is set to add a six-bed intensive care unit (ICU) and a 32-bed ward. Initial estimates anticipated this expansion would be completed in late 2022; however, The Metro South website indicates that the procurement process to secure a builder is currently in progress.

A Stage 2 expansion, which would boost the capacity and capability of the hospital even further, is under consideration, however this proposal is in the business case and planning stage, and no formal plans are publicly available. The ultimate timing and components of the Stage 2 expansion are unclear.

The Redland Hospital Infrastructure Project has also been announced which includes a $25 million modular ward to provide 28 additional beds.

Table 3.1: Existing Public and Private Hospitals, Redland City LGA and Surrounds

Map ID	Name	Address	Beds (No.)	Distance* (km)
	Public Hospitals			
1	Redland Hospital	Weippin St, Cleveland	172	2.9
2	QEII Jubilee Hospital	Kessels Rd & Troughton Rd, Coopers Plains	243	23.8
3	Princess Alexandra Hospital	199 Ipswich Rd, Woolloongabba	1,051	24.9
4	Royal Brisbane and Women's Hospital	Butterfield St, Herston	982	30.6

Map ID	Name	Address	Beds (No.)	Distance* (km)
5	Logan Hospital	Armstrong Rd & Loganlea Rd, Meadowbrook	478	32.9
6	The Prince Charles Hospital	627 Rode Rd, Chermside	663	35.1
	Private Hospitals			
7	Mater Hospital Redland	Weippin St, Cleveland	60	2.9
8	Belmont Private Hospital	1220 Creek Rd, Carina Heights	150	18.8
9	Sunnybank Private Hospital	245 McCullough St, Sunnybank	135	23.5
10	Greenslopes Private Hospital	Newdegate St, Greenslopes	694	23.7
11	Mater Private Hospital Brisbane	Raymond Tce, South Brisbane	323	25.3
12	St Vincent's Private Hospital Brisbane	411 Main St, Kangaroo Point	164	26.1
13	Brisbane Private Hospital	259 Wickham Tce, Brisbane	181	29.3
14	St Andrew's War Memorial Hospital	457 Wickham Tce, Brisbane	250	29.4
15	The Wesley Hospital	451 Coronation Dr, Auchenflower	535	30.4
16	RiverCity Private Hospital	401 Milton Rd, Auchenflower	N/A	31.6
17	Toowong Private Hospital	496 Milton Rd, Toowong	58	31.6
18	Westside Private Hospital	32 Morrow St, Taringa	N/A	32.7
19	Canossa Private Hospital	169 Seventeen Mile Rocks Rd, Oxley	90	33.5
20	St Vincent's Private Hospital Northside	627 Rode Rd, Chermside	227	35.0
21	North West Private Hospital	137 Flockton St, Everton Park	150	37.6

Source: Queensland Government Department of Health, Company websites, hospitalstays.com, Foresight Partners. Includes beds in ICUs. *Distance by road from subject site.

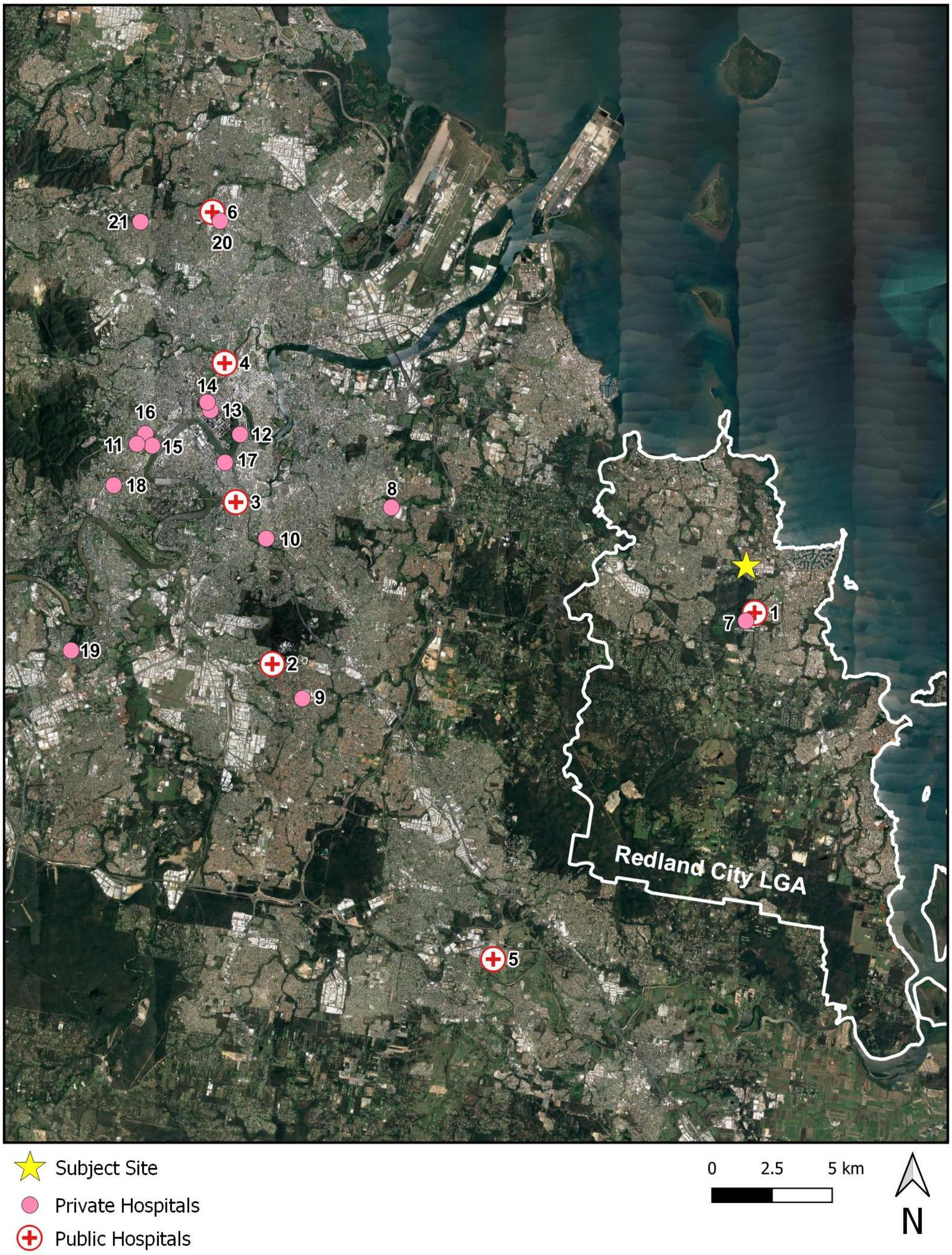
Future Developments

A satellite public hospital is currently under construction at 22-28 Meissner Street, Redland Bay within the Weinam Creek PDA. The facility is being developed to ease pressure on the existing Redland Public Hospital and provide improved health care access to residents of the Southern Moreton Bay Islands. Queensland Health states the facility is expected to open by around 2023[4], however the exact provision of specific health care services is unclear.

A DA (MCU22/0093) for a private hospital, health care services, and supporting uses at 19-21 Middle Street, Cleveland is under assessment (refer to Table 3.4 and Figure 3.3). Plans (dated 25 August 2022) indicate this development will include a private day hospital (1,294m^2 GFA), multiple consulting suites (1,702m^2 defined as Health Care Services or Office uses and 710m^2 defined at Health Care Services or Shop uses), and retail uses (66m^2 Shop or Food and Drink Outlet uses).

[4] Health.qld.gov.au

Figure 3.1: Public and Private Hospitals, Redland City LGA and Surrounds



Day Surgeries

Table 3.2 sets out the existing private day surgery facilities in and near the Redland City LGA and Figure 3.2 shows their locations. A total of 23 day surgery facilities were identified, the majority of which are clustered around the Brisbane CBD. There is only one dedicated day surgery facility in the Redland City LGA (Eastern Endoscopy Centre), in addition to any day surgery services provided within the Redland Mater Private Hospital.

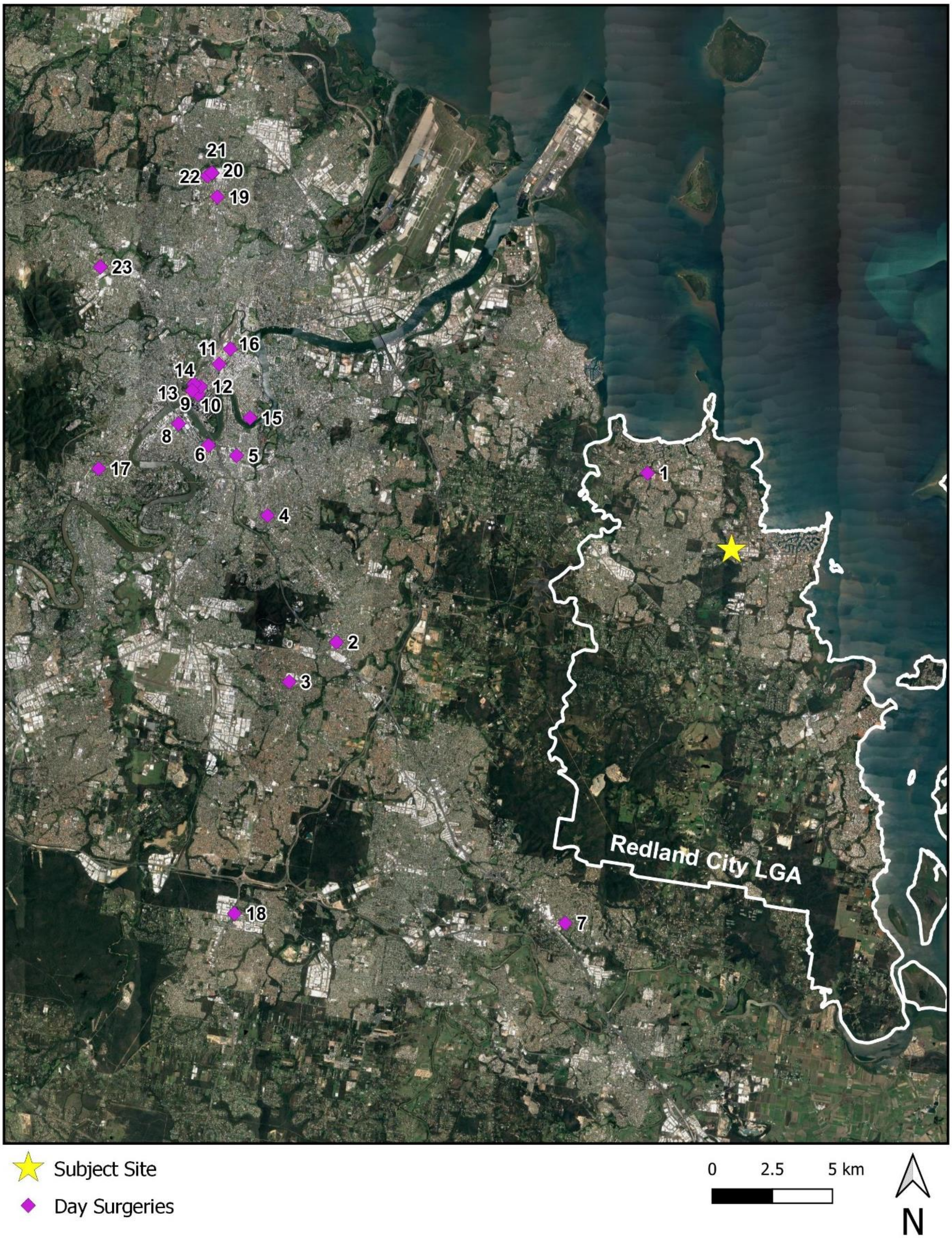
The nearest day surgery facilities outside Redland City are at Upper Mount Gravatt, Sunnybank, and Greenslopes, more than 20 kilometres by road from the subject site. This represents a substantial travel distance for Redland City residents, particularly those in the southern part of region in and near Victoria Point/Redland Bay.

Table 3.2: Existing Day Surgery Facilities, Redland City LGA and Surrounds

Map ID	Name	Address	Distance* (km)
1	Eastern Endoscopy Centre	1120 Birkdale Rd, Birkdale	7.0
2	Eye-Tech Day Surgeries Southside	22-26 Sanders St, Upper Mt Gravatt	20.5
3	Brisbane Endoscopy Services	259 McCullough St, Sunnybank	23.4
4	Brisbane Day Hospital	687 Logan Rd, Greenslopes	24.0
5	Renaissant Aesthetic Health	45 Wellington Rd, East Brisbane	24.5
6	Icon Cancer Centre South Brisbane	293 Vulture St, South Brisbane	26.3
7	Southside Endoscopy Centre	66 Bryants Rd, Loganholme	27.3
8	Southbank Day Surgery	140 Melbourne St, South Brisbane	27.8
9	Spring Hill Clinic	383 Wickham Tce, Spring Hill	28.2
10	Dr Lanzer Cosmetic Day Hospital	201 Wickham Tce, Spring Hill	28.7
11	Pacific Day Surgery	38 Misterton St, Fortitude Valley	28.8
12	Queensland Eye Hospital	55 Little Edward St, Spring Hill	28.9
13	Eye-Tech Day Surgeries	33 North St, Spring Hill	29.4
14	Spring Hill Specialist Day Hospital	33 North St, Spring Hill	29.4
15	New Farm Clinic	22 Sargent St, New Farm	30.1
16	Marie Stopes Bowen Hills Day Surgery	8 Campbell St, Bowen Hills	30.2
17	Westside Private Hospital	32 Morrow St, Taringa	32.8
18	Logan Endoscopy Services	3276 Beaudesert Rd, Browns Plains	33.1
19	Chermside Dialysis Clinic	671 Gympie Rd, Chermside	34.7
20	Icon Cancer Centre Chermside	1/956 Gympie Rd, Chermside	35.4
21	Chermside Day Hospital	956 Gympie Rd, Chermside	35.5
22	Hummingbird House	60 Curwen Tce, Chermside	35.6
23	Samford Road Day Hospital	383-391 Samford Rd, Gaythorne	36.7

Source: Queensland Government Department of Health, surgery websites, Foresight Partners. Excludes day surgery facilities provided within the Redland Mater Private Hospital. *Distance by road from subject site.

Figure 3.2: Private Day Surgery Facilities, Redland City LGA and Surrounds



Medical Specialists

According to the Department of Health's National Health Workforce Dataset, there were around 181 medical specialists and clinicians (excluding GPs and hospital non-specialists) working in the Redland City LGA at June 2020 (latest available data) (Table 3.3).

Figure 3.3 shows the geographic distribution of medical specialists identified within the Redland City LGA. Allied and mental health practitioners are also mapped.

Clinical specialists will often have a consulting room in multiple locations, such as within a hospital and at an office nearby. There are notable clusters of specialists around the larger activity centres in Cleveland, Capalaba, and Victoria Point, as well as near the Redland Hospital precinct.

There are several health care services that are currently not supplied within the region that, if introduced, would increase the provision of medical services for Redland City residents. These services could be accommodated within the proposed medical consulting rooms at the subject site.

Table 3.3: Provision of Medical Specialists, Redland City LGA, 2020

		Australia	QLD	Redland City LGA
Medical Practitioners	General practitioner (GP)	32,410	6,688	206
	Hospital non-specialist	13,360	2,833	74
	Specialist	***38,323***	***7,742***	***104***
	Specialist-in-training	***17,328***	***3,764***	***70***
	Other clinician	***2,653***	***574***	***7***
	Non-clinician	***1,219***	***184***	***N/A***
	Specialist/Clinician Subtotal	**59,523**	**12,264**	**181**

Source: National Health Workforce Dataset 2020 (latest available). Excludes allied health practitioners such as optometrists, psychologists, physiotherapists, podiatrists, etc. Excludes dentists.

Future Developments

Table 3.4 sets out relevant proposed and approved developments in the Redland City LGA where they are expected to supply additional medical specialists/clinicians in line with the supply analysis in Table 3.3 (i.e. excluding GPs, allied health, and dentists).

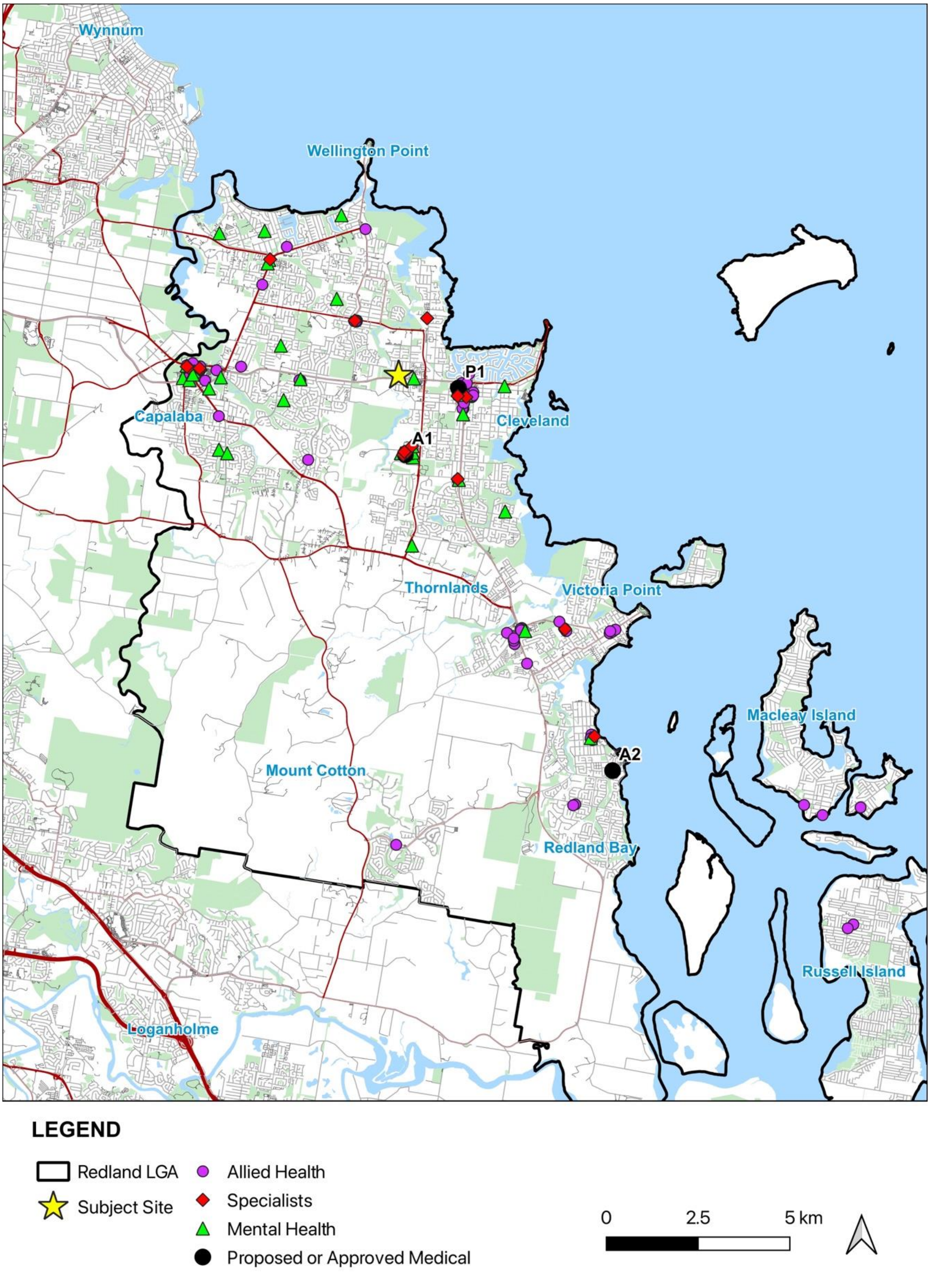
It is estimated that these developments will supply an additional 45 medical specialists.

Table 3.4: Proposed or Approved Medical Specialist Facilities, Redland City LGA

Map ID	Address	GFA (m^2)	Medical Specialists	DA	Notes
A1	16-24 Weippin St, Cleveland	4,756	Unknown (Est. 15)	MCU21 /0165	Currency extension to 2026.
A2	22-28 Meissner St, Redland Bay	1,370	Unknown (Est. 18)	N/A	Weinam creek PDA satellite hospital.
P1	19-21 Middle St Cleveland	3,772	Unknown (Est. 12)	MCU22 /0093	Proposed private hospital and associated uses.
	Est. Total Specialists		**45**		

Source: Redland City Council Development.i. Specialists includes specialised medical doctors only. Excludes GPs, allied health, and dentists. Map IDs refer to Figure 3.3.

Figure 3.3: Selected Medical, Mental Health and Other Specialists, Redland City LGA



3.2 Aged Care

There are currently 16 aged care facilities operating with the Redland City LGA supplying a total of 1,706 places as shown in Table 3.5 in order of their proximity to the subject site. This includes residential aged care facilities which receive government funding only.

Some of these facilities identified are co-located with retirement independent living units (ILUs). The locations of all identified facilities are shown in Figure 3.4.

Table 3.5: Current Supply of Aged Care Facilities, Redland City LGA

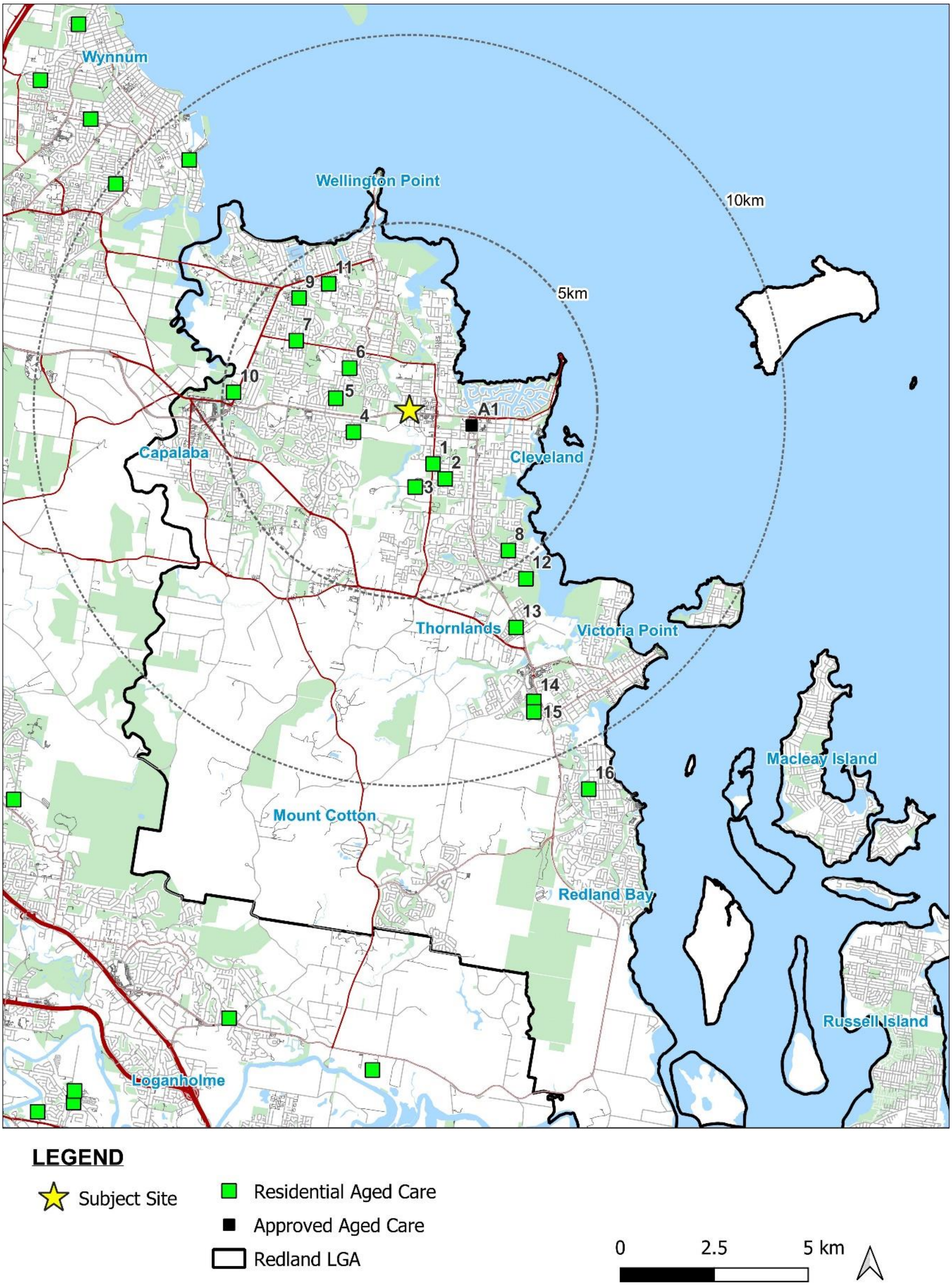
Map ID	Name	Address	Places (No.)	Distance* (km)
1	Mandalay Retreat	Cnr Bay & Wellington Sts, Cleveland	109	2.2
2	Seaton Place	111 Smith St, Cleveland	137	2.7
3	Redland Residential Care	3 Weippin St, Cleveland	128	2.8
4	Blue Care Alexandra Hills Nandeebie	87 Winchester Rd, Alexandra Hills	76	4.1
5	Churches of Christ Care Buckingham Gardens	8 Buckingham St, Alexandra Hills	50	4.1
6	Wellington Park Private Care	16 Balmoral St, Wellington Point	94	4.4
7	Sylvan Woods Aged Care	500 Old Cleveland Rd East, Birkdale	90	5.1
8	Arcare Thornlands	1-9 George Thorn Dr, Thornlands	92	6.1
9	Micare Prins Willem Alexander Lodge	62 Collingwood Rd, Birkdale	189	6.3
10	CapellaBay	260 Old Cleveland Rd East, Capalaba	133	7.1
11	Regis Birkdale	25 MacGregor Dr, Birkdale	70	7.2
12	Bolton Clarke Moreton Shores	91-101 King St, Thornlands	120	7.4
13	Finlandia Village	343 Cleveland-Redland Bay Rd, Thornlands	61	7.8
14	Marebello	537-547 Cleveland-Redland Bay Rd, Victoria Point	138	9.8
15	Adventist Retirement Village	571-585 Cleveland-Redland Bay Rd, Victoria Point	179	10.4
16	Blue Care Redland Bay Yarrabee	61-71 Peel St, Redland Bay	40	13.0
	Total Places		**1,706**	

Source: Aged Care Service List, Gen Aged Care Data, Australian Government. Foresight Partners. *Distance by road.

A search of Redland City Council's PD Online service has revealed one development approval related to aged care facilities. The relevant details of this approval are set out below and its location is shown in Figure 3.4.

Development Permit approval was granted in September 2019 for a new 126 bed aged care facility at 4-10 Doig Street, Cleveland. The five storey development will also include ground floor retail (950m^2) and a supermarket (1,674m^2). This project commenced construction around March 2022.

Figure 3.4: Existing and Future Supply of Aged Care Facilities, Redland Bay LGA



3.3 Retirement Living

There are 19 existing retirement and over 50s lifestyle villages in the Redland City LGA offering a combined total of 2,071 independent living units (ILUs). The identified facilities are presented in Table 3.6 below and their locations are shown in Figure 3.5.

Of the identified supply, approximately 128 ILUs are vacant, representing an occupancy rate of around 93.7%. This implies that existing facilities are operating at effective full occupancy (90%+), which affords very limited flexibility for prospective new retirement living residents.

Table 3.6: Current Supply of Retirement ILUs, Redland City LGA

Map ID	Name	Address	ILUs	Vacancies (Units)	Occupancy Rate	Distance * (km)
1	Freedom Aged Care Cleveland	66 Bainbridge St	66	3	95%	0.7
2	Aveo Cleveland Gardens	83 Freeth St West, Ormiston	154	16	90%	0.8
3	Cleveland Manor	11 Grant St, Cleveland	79	10	87%	1.0
4	Ormiston Rise	174-186 Wellington St, Ormiston	76	1	98%	2.7
5	Aveo Cleveland	148 Smith St, Cleveland	138	13	91%	3.3
6	Blue Care Nandeebie	87 Winchester Rd, Alexandra Hills	67	5	93%	4.0
7	Bayside Green/ Fernbourne Grove	37 Station St, Wellington Point	28	N/A	N/A	4.7
8	Prins Willem Alexander	62 Collingwood Rd, Birkdale	75	3	96%	6.5
9	Gateway Lifestyle/Hometown Australia	22-34 Collingwood Rd, Birkdale	135	2	99%	6.6
10	Wellington Manor	269-289 Birkdale Rd, Birkdale	163	10	94%	6.6
11	Bolton Clarke Moreton Shores	91-101 King St, Thornlands	152	17	89%	7.1
12	Finlandia Village	337-343 Redland Bay Rd, Thornlands	23	2	91%	7.8
13	Renaissance Retirement Living	36 Bunker Rd, Victoria Point	311	0	100%	9.8
14	Oak Tree Retirement Village	9 Driftwood St, Victoria Point	54	N/A	N/A	10.1
15	Adventist Retirement Village	571-585 Cleveland-Redland Bay Rd, Victoria Point	145	19	87%	10.4
16	Salford Waters	9 Salford St, Victoria Point	181	7	96%	11.7
17	Tranquil Waters	31 Thompson St, Victoria Point	121	10	92%	12.3
18	Palm Lake	57 Hamilton St, Redland Bay	26	6	77%	13.9
19	Aveo Freedom Redland Bay	100 Swansea Cct, Redland Bay	77	4	95%	14.3
	Total		**2,071**	**128**	**93.8%**	

Source: Villages.com.au, data.qld.gov, Foresight Partners. Vacancy rates based on latest available Village Comparison Documents and properties listed for sale. *Distance in kilometres by road.

A search of Redland City Council's Development i service has revealed several development applications related to retirement living facilities. The relevant details of these DAs are set out in Table 3.7 and their locations are shown in Figure 3.5.

Table 3.7: Future Retirement Living Facilities, Redland Bay LGA

Map ID	Name	Address	Additional ILUs (No.)	Distance* (km)
A1	Cleveland Village	236-246 Queen St, Cleveland	156	0.7
A2	Unknown	67-107 Middle St, Cleveland	149	2.4
4	Ormiston Rise	174 - 186 Wellington St, Ormiston	78	2.7
13	Renaissance Retirement Living	36 Bunker Rd, Victoria Point	4	9.8
A3	Seachange Lifestyle Resort	673-685 Redland Bay Rd and 10 Double Jump Rd, Victoria Point	226	11.8
P1	Halcyon	195-203 and 205-229 Serpentine Creek Rd, Redland Bay	Up to 500	17.9
	Total Additional ILUs		**1,113**	

Source: Redland City Council Development.i, Foresight Partners. *Distance by road.

A1 - Cleveland Village is an approved retirement village at 236-246 Queen Street, Cleveland. A recent Change Application (MCU20/0077.04) has been lodged which indicates the yield of the village is 156 ILUs. It is assumed that this development will be completed by 2026.

A2 - An application (MCU21/0149) to redevelop Cleveland Central Shopping Centre and add 149 Multiple Dwelling/Retirement Living units is approved. The application material provides no information regarding the mix of retirement and general residential units. It is conservatively assumed this development will provide 149 retirement living units and will be completed by 2026.

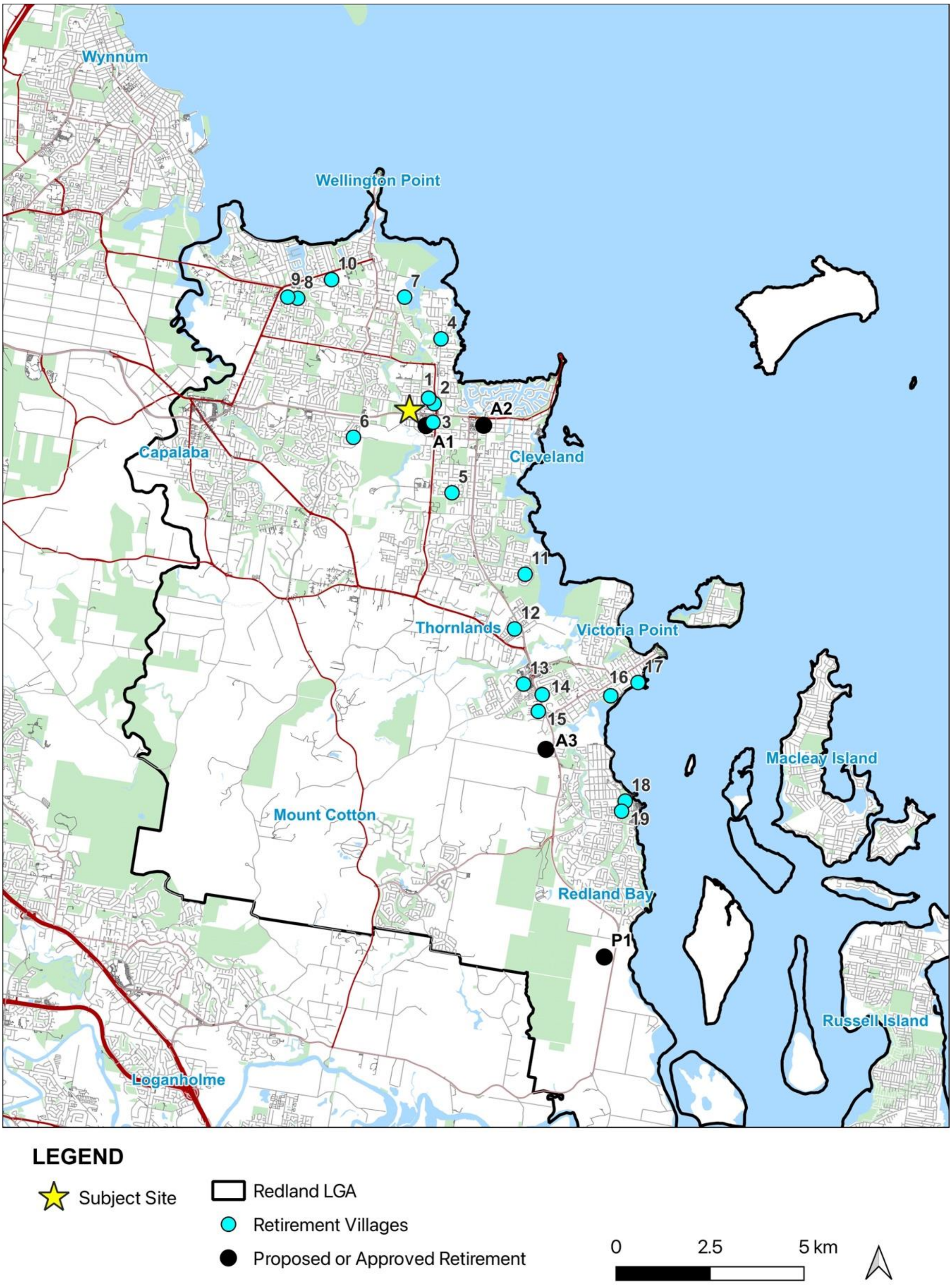
Ormiston Rise will ultimately comprise 154 retirement living units. Based on plans submitted with the October 2021 Change Application (MCU17/0157.04), 76 ILUs have been constructed. It is assumed that the remaining 78 ILUs will be developed on the site by mid-2024.

Approval was granted in March 2017 for four additional retirement living units at **Renaissance Retirement Living**. Based on June 2022 aerial imagery, these units have not yet been constructed; however, it is assumed they will be completed by mid-2024.

A3 - Seachange Lifestyle Resort is an approved (MCU21/0013) retirement living facility (relocatable home park) at Redland Bay Road and Double Jump Road, Victoria Point. It is expected to deliver 226 retirement dwellings by mid-2026.

P1 - A DA (MCU21/0033) for Halcyon Redland Bay is under assessment by Council. The submitted application material indicates a maximum yield of 500 retirement dwellings. For the purpose of this report, it is optimistically assumed that the maximum yield is established by mid-2026.

Figure 3.5: Existing and Future Supply of Retirement Living Facilities, Redland Bay LGA



3.4 Childcare

The ABS defines formal childcare as either before and after school care, family day care or long day care[5].

Long day care (LDC) is defined as care for children from birth to school age, with centres operating Monday to Friday for at least 10 hours a day for a minimum of 48 weeks a year[6].

Before and after school care is defined by the Queensland Government as care for school age children (5+ years), generally from 7-9am and 3-6pm[7]. Consequently, centres offering outside school hours care (OSHC) are not comparable to LDC centres.

Family day care is defined by the ABS[5] as "*A type of formal care provided in the home environment of a registered carer*". Due to carer-child ratio requirements, family day care services are limited in the number of spaces they can provide.

The proposed childcare will operate as a LDC centre, therefore the market for the subject proposal is limited to the proportion of children aged 0 to 5 years who typically use LDC.

Table 3.8 sets out the characteristics of existing LDC childcare centres proximate to the subject site.

There are 13 existing LDC childcare centres providing a total of 1,037 places within around five kilometres by road from the subject site, a number of which have vacancies advertised online. The locations of these centres are shown in Figure 3.6.

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[5] ABS Childhood Education and Care, Australia, Cat. 4402.0, (Glossary), June 2017.

[6] https://www.qld.gov.au/families/babies/childcare/types/long

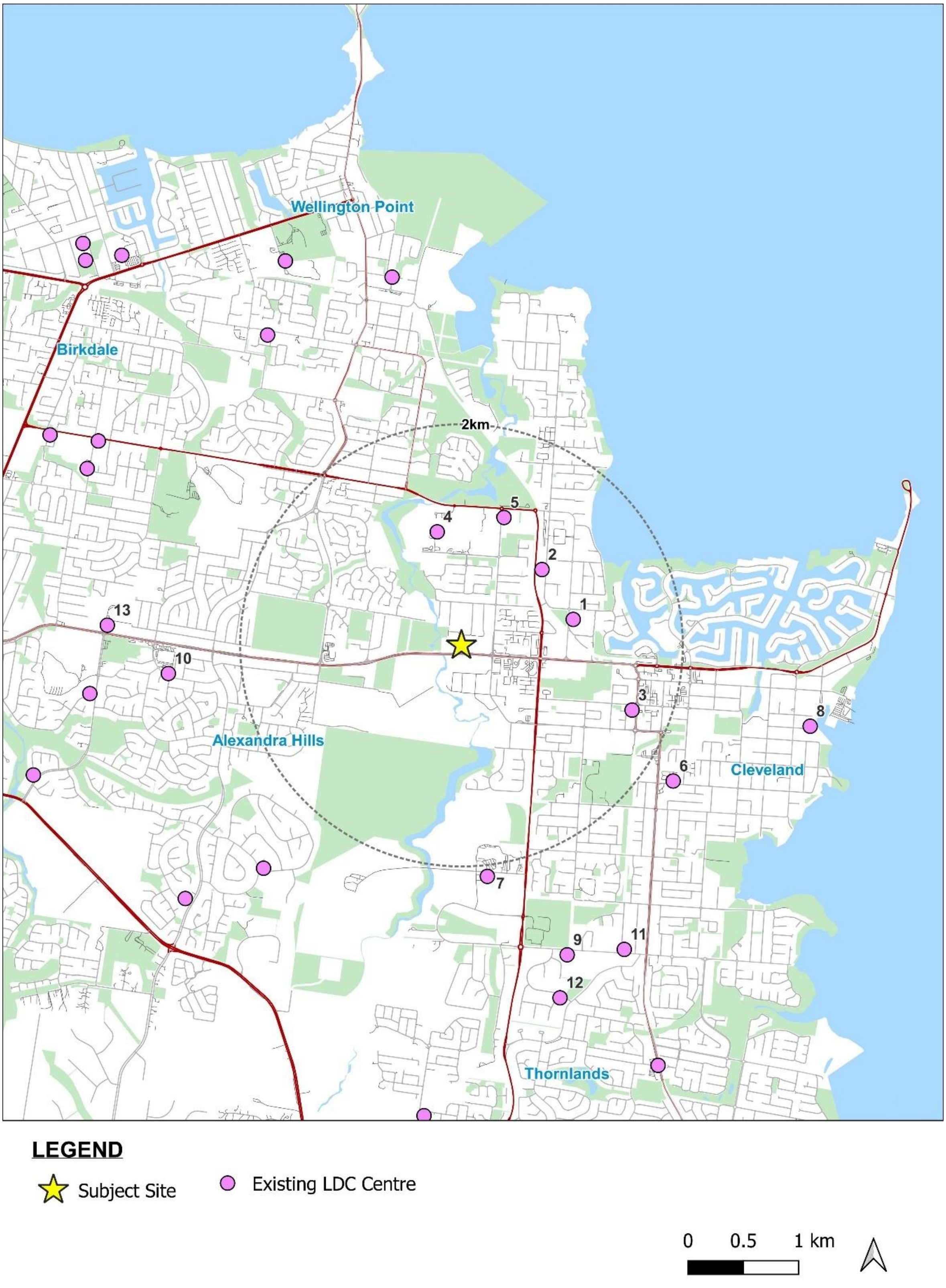
[7] https://www.qld.gov.au/families/education/pages/care

Table 3.8: Existing LDC Childcare Centres, Proximate to Subject Site

Map ID	Name	Location	Age Group	Licensed Places	Hours	Vacancies	Distance* (km)
1	Jungle Cubs Early Education Centre	35 Gordon St, Ormiston	0-5	75	6:30am-6:30pm	All ages, all days	1.3
2	Sunkids Ormiston	70 Wellington St, Ormiston	0-5	85	6am-6pm	0-2yrs 2 days pw, 2-3yrs 1 day pw, 3-5yrs 5 days.	1.5
3	Cleveland Early Learning Centre	149 Queen St, Cleveland	0-5	77	6:15am-6:15pm	0-1yrs 4 days, 2-5yrs 5 days.	2.0
4	Ormiston College Early Learning Centre	97 Dundas St W, Ormiston	1-5	79	7am-6pm	No vacancies	2.2
5	Jumping Beans Childcare	66 Sturgeon St, Ormiston	0-5	80	7am-6pm	0-1yrs none, 1-2yrs two days, 2-5yrs 5 days.	2.2
6	Bay House Early Education	120 Princess St, Cleveland	0-5	75	6:30am-6pm	1-2yrs 1 day, 2-3yrs two days, 4-5yrs three days.	2.9
7	Bayside Park Early Education Centre	16 Weippin St, Cleveland	0-5	75	6am-6pm	N/A	3.3
8	Star of the Sea Long Day Care and Kindergarten	4 Longland St, Cleveland	0-5	75	7am-6pm	All ages, all days	3.7
9	Jumping Beans Childcare	188 South St, Thornlands	0-5	80	7am-6pm	0-1yrs 1 day, 1-2yrs 3 days, 2-5yrs 5 days.	3.8
10	Smart Tots Childcare	51 Cambridge Dr, Alexandra Hills	0-5	95	6:30am-6:30pm	0-2yrs 5 days, 2-3yrs 3 days, 3-5yrs 5 days.	4.3
11	Happy Tots Education	209 Waterloo St, Cleveland	1-5	120	6:15am-6:15pm	All ages, all days	4.3
12	Guppy's Early Learning Centre	39 Osprey Dr, Thornlands	0-5	65	6am-6pm	N/A	4.4
13	Rose Rainbow	136 Finucane Rd, Alexandra Hills	1-5	56	6:30am-6pm	0-2yrs 3 days, 2-5yrs 5 days	4.8

Source: echildcare, childcarefinder.gov.au, careforkids, Foresight Partners. N/A = vacancies are not publicly advertised. *Distance by road from subject site.

Figure 3.6: Existing Childcare Centre Network, Ormiston



3.5 Retail

A retail network is comprised of different types of centres which satisfy various needs of consumers. The centre network hierarchy as set out in the Redland City Plan lists the following centre zones in order of function: Principal Centre, Major Centre, District Centre, Local Centre and Neighbourhood Centre.

The nearest centre is a Neighbourhood Centre directly opposite the subject site at the corner of Delancey Street and Shore Street West. It contains a small retail precinct including a chemist, general medical clinic, numerous food and beverage outlets and convenience services.

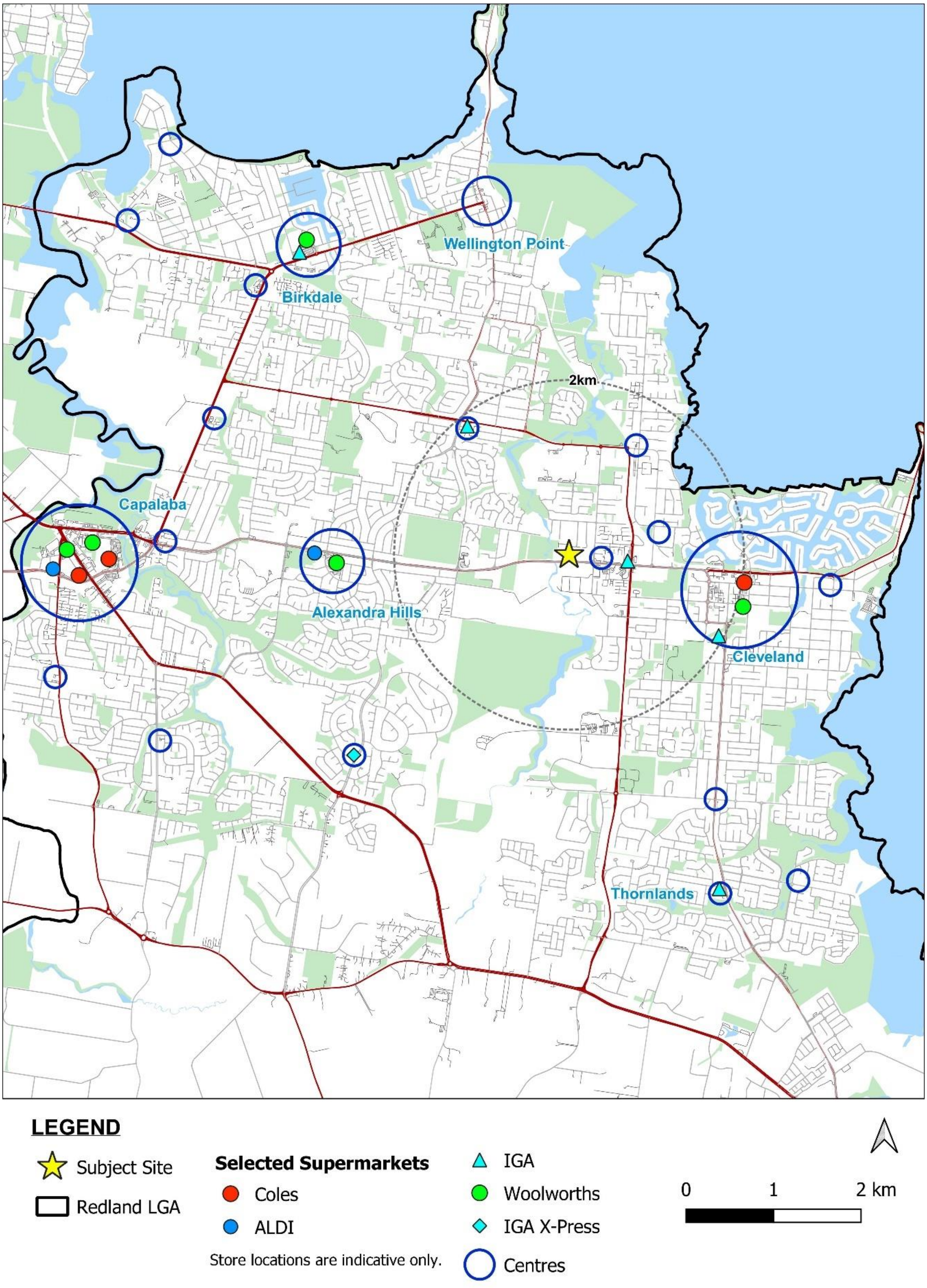
Immediately to the east of this Neighbourhood Centre is a mixed-use precinct centred along Shore Street that extends east approximately 700 metres. This precinct consists of a number of major national fast food chains, large format retailers, a tavern, three service stations, IGA supermarket, car yards and other retailers.

Further east on Shore Street is the Cleveland Principal Centre Zone, which contains one of Redland City's two central business districts (with Capalaba) providing the highest order and widest range of business, community, professional, residential and retail uses to service the Local Government Area. This precinct is around 1.5 kilometres east of the subject site.

Figure 3.7 shows the location of the subject site in the context of the centre network in the northern portion of the Redland City LGA.

Proposed retail uses at the subject site would largely cater to the needs of on-site residents, workers and visitors.

Figure 3.7: Existing Retail and Centre Network, Northern Redland City LGA



4. DEMAND

4.1 Hospitals, Medical and Health Services

4.1.1 Industry Overview

Australian public and private hospitals have experienced substantial growth in the number of patient separations[8] in recent years. Data from the Australian Institute of Health and Welfare indicates that between 2013-14 and 2020-21, the total number of hospital (public and private) separations rose by 22%, from 9.7 million to 11.8 million[9].

The proportion of private hospital separations averaged around 40% of all separations between 2013-14 and 2020-21. Free standing day hospitals/surgeries represented around 22.3% of total private hospital separations, or around 9.2% of all hospital separations in 2020-21.

At the regional level, the Queensland Government prepared a Metro South Health Plan 2017-22 in May 2017, which includes the Redland City LGA among other areas. The purpose of the plan is to identify key service directions to guide service development and address the future health priorities of the community over the planning period.

The plan projects demand for hospital beds to increase by 61% between 2016 and 2027, and an increase of 81% in hospital admissions for people aged over 70 in the Metro South region. Around 50% of total hospital admissions are expected to be in private hospitals.

In the Redland City region, the plan identifies an estimated shortfall of 261 beds at the Redland Public Hospital by 2022 (page 26). Although a forecast shortfall in Redland City public hospital facilities has been identified by Metro South, the endorsement of the plan "*does not represent a commitment by Metro South Health to fund any additional capital and/or operating costs that may be required for implementation*" (page 7).

In clinical health services, around 82.4% of Australians aged 15 and over saw a GP in the last 12 months, and around 37.4% saw a medical specialist[10]. Emerging trends in Australia suggest a shift towards large health hubs offering a range of services including GPs, specialists and allied health practitioners thereby enhancing accessibility and convenience for the community.

4.1.2 Defined Service Area

Several factors will likely influence the catchment from which the proposed private hospital, day surgery, and medical specialist centre would draw the majority of its patients. These factors include, but are not limited to:

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[8] A patient separation occurs when an admitted patient is discharged, transferred, leaves, dies, or changes their type of care (e.g. acute to rehabilitation). (Source: ABS Private Hospitals 2016-17).

[9] AIHW Admitted patient care.

[10] ABS Patient Experiences in Australia 2020-21.

- The size, function and services offered at the proposed hospital and medical precinct;
- Convenience and accessibility, including drive times and ease of parking;
- Natural and man-made barriers such as waterways, railway lines and the road network; and
- The location, size, operational characteristics and capacity/availability of existing hospitals and medical specialist facilities.

Based on these factors, it is estimated that the majority of the patients to a private hospital, day surgery and medical specialist centre at the subject site would originate from within the Redland City LGA. Accordingly, it is assumed that the main catchment for these facilities is the entire Redland City LGA.

Figures 3.1, 3.2 and 3.3 in Section 3.1 of this report shows the locations of existing public and private hospitals, day surgeries, and medical specialist facilities in and near the Redland City LGA.

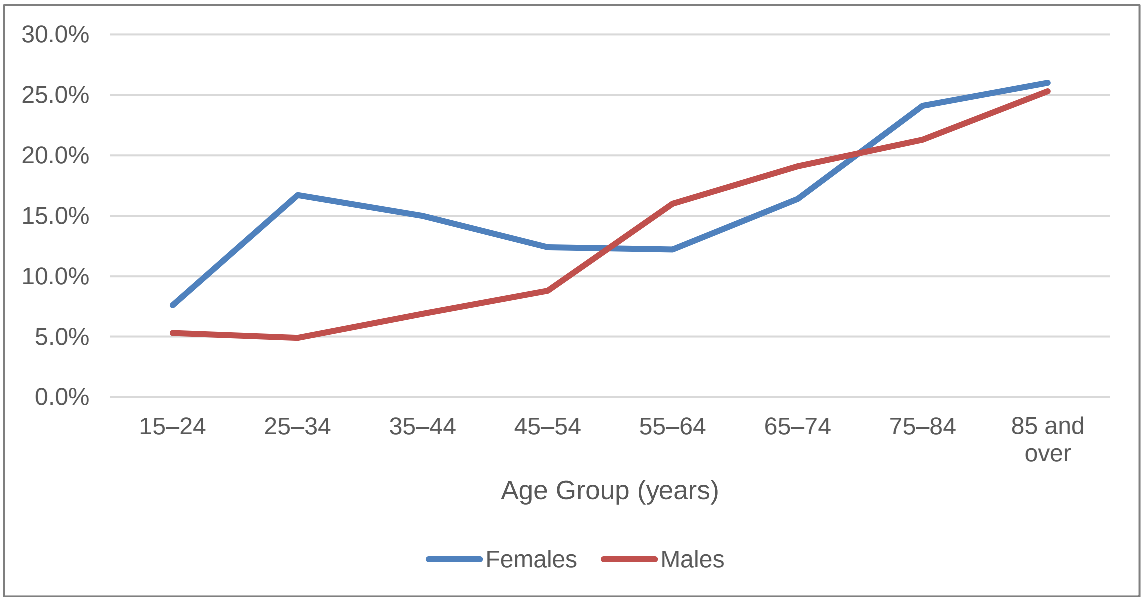
4.1.3 Factors Likely to Influence Demand

Several factors are likely to influence demand for hospital and medical services including population growth, demographic characteristics (i.e. age), prevalence of health conditions, disease, obesity and smoking.

According to the ABS patient experience survey (2020-21):

- a far higher proportion of Australians aged 55 and over (17.5%) were admitted to hospital in the last 12 months compared to those under 55 (9.8%); and
- Australians aged 65 and over (56.5%) were far more likely to see a medical specialist than those aged 15-64 (32.7%).

Figure 4.1: Proportion of People Admitted to Hospital by Age Group, Australia, 2020-21



Source: ABS Patient Experiences in Australia 2020-21.

According to data from the Australian Health Policy Collaboration's (AHPC) Health Tracker, Redland City LGA had an average rate of:

- 13.5 smokers per 100 persons, compared to 16.0 for Queensland and 15.1 for Australia in 2017-18;
- 65.8 overweight or obese adults per 100 persons (aged 18+), compared to 67.3 for Queensland and 66.9 for Australia;
- 47.6 deaths related to cardiovascular disease per 100,000 aged 30 to 69 years, compared to 57.4 for Queensland and 55.8 for Australia;
- 130.6 deaths related to cancers per 100,000 aged 30 to 69 years, compared to 136.5 for Queensland and 131.2 for Australia;
- 11.4 deaths related to respiratory disease per 100,000 aged 30 to 69 years, compared to 17.4 for Queensland and 17.5 for Australia.

Although the above health indicators for Redland City are comparable to those for Queensland, the key risk factor is the significantly higher proportion of older residents in the region. Compared to 34.8% in Queensland, 41% of Redland City residents were aged 50 and over as at the 2021 Census.

Census Health Indicators

For the first time, questions regarding long term health conditions were asked in the 2021 Census. Responses revealed information relevant to health conditions held for 6 months or longer which were diagnosed by a doctor or nurse.

Identified health conditions included arthritis, asthma, cancer, dementia, diabetes, kidney, heart, lung diseases, mental health conditions, stroke, and 'other'. Key insights relevant to the Redland City region include:

- Redland City LGA had a higher prevalence of residents with at least one long-term health condition (37.2% of residents) compared to all nearby LGAs, and a higher prevalence than the Queensland level (32.9% of residents) (refer to Table 2.3).
- Redland City LGA also had a high prevalence of residents (11.1%) with two or more long-term health conditions compared to other areas.

4.1.4 Current Provision

Private Hospital and Day Surgery Provision

To estimate future demand for private hospital and day surgery facilities, the current provision of these facilities at the state and national levels was examined. Table 4.1 sets out the estimated private hospital beds and day surgery beds per 1,000 persons at the Queensland, New South Wales, Victoria and Australia benchmark levels.

In Queensland, the provision of private hospital beds per 1,000 persons is slightly higher than other states and the national level. For day surgery facilities, the provision of beds by population is consistent across state and national levels.

Since 2014-15, the provision of private hospital beds per 1,000 persons in Queensland has grown at an average rate of around 1.5% (from 1.26 to 1.29 in 2016-17). The annual growth rate was around 2.1% at the Australia level.

For private day surgery beds, annual growth in the benchmark provision has averaged around 3.8% at the Queensland level over the two years to 2016-17.

Table 4.1: Benchmark Provision of Private Hospital and Day Surgery Facilities, June 2017

	QLD	NSW	VIC	AUST
Private Hospitals^ (No.)	52	85	72	265
Beds (No.)	6,378	7,793	7,792	28,721
Population at June 2017	4,928,374	7,850,871	6,299,798	24,594,202
Beds per 1,000 persons	**1.29**	**0.99**	**1.24**	**1.17**
Private Day Surgeries* (No.)	58	113	94	357
Beds (No.)	625	990	812	3,310
Population at June 2017	4,927,629	7,867,936	6,321,606	24,601,860
Beds per 1,000 persons	**0.13**	**0.13**	**0.13**	**0.13**

Source: ABS Private Hospitals 2016-17 Cat 4390.0 (latest available), ABS Regional Population Growth (released July 2022), ^Excludes psychiatric hospitals. Foresight Partners. Figures may not add due to rounding. *Free standing day hospitals/surgeries.

Medical Specialist Provision

Table 4.2 sets out the average provision of medical specialists and clinicians as at June 2020 for Redland City LGA, Queensland and Australia based on the Department of Health's National Health Workforce Dataset.

Compared to the state and national level, Redland City had a far lower provision of medical specialists and clinicians as at June 2020. This implies that the needs of Redland City residents are being serviced elsewhere (outside the region).

Table 4.2: Benchmark Provision of Medical Specialists and Clinicians, June 2020

	Redland City LGA	QLD	AUST
Population (June 2020)	160,682	5,175,003	25,655,289
Medical Specialists and Clinicians	181	12,264	59,523
Provision per 1,000 persons	**1.13**	**2.37**	**2.32**

Source: Table 3.3, AIHW National Health Workforce Dataset June 2020 (latest available). ABS Regional Population Growth (released July 2022), Excludes psychologists, allied health professionals, and non-clinicians, includes GPs.

4.1.5 Current and Forecast Demand

Private Hospital and Day Surgery Demand

Table 4.3 sets out estimates of demand for private hospital and day surgery facilities in the Redland City LGA to 2041. Estimates are based on the benchmark provision of these facilities at the Queensland level presented in Table 4.1.

Table 4.3: Forecast Demand for Private Hospital and Day Surgery Facilities, Redland City LGA, 2021 to 2041

	2021	2026	2031	2036	2041
Redland City LGA Population	161,730	171,754	180,069	186,460	193,270

	2021	2026	2031	2036	2041
Private Hospital Facilities					
Bed demand per 1,000 persons	1.42	1.57	1.74	1.92	2.12
Demand for Beds (No.)	230	270	313	357	409
Supply of Beds (No.)	60	60	60	60	60
Oversupply (+) / Undersupply (-)	**-170**	**-210**	**-253**	**-297**	**-349**
Private Day Surgery Facilities					
Bed demand per 1,000 persons	0.15	0.17	0.20	0.23	0.27
Demand for Beds (No.)	24	30	36	44	53
Supply of Beds (No.)	10	20	20	20	20
Oversupply (+) / Undersupply (-)	**-14**	**-10**	**-16**	**-24**	**-33**

Source: Table 2.1, Table 4.1, Foresight Partners. Figures may not add due to rounding. Assumes combined 10 day surgery beds within Eastern Endoscopy Surgery (Birkdale) and Redland Mater Private Hospital.

This analysis applies an assumed annual growth in the benchmark provision of private hospital beds (2% p.a. growth) and private day surgery beds per 1,000 residents (3% p.a. growth) in line with observed trends (refer to Section 4.1.4).

Based on this assessment, there is an estimated current shortfall of around 170 private hospital beds in Redland City LGA as at June 2021. This is forecast to increase with population growth to an undersupply of around 253 beds by 2031, and 350 beds by 2041.

Similarly for day surgery beds, there was an estimated undersupply of around 14 beds as at June 2021, forecast to increase to 16 beds by 2031, and 33 beds by 2041. This assumes around 10 beds will be delivered by 2026 in the proposed day hospital at 19-21 Middle Street, Cleveland (refer to Table 3.4)

Given the socio-economic characteristics of Redland City residents, specifically the age profile, demand for private hospital and day surgery facilities is likely to be higher than the Queensland level now and in the future. Consequently, the actual shortfall in these facilities may be higher than indicated in Table 4.3.

Medical Specialist Demand

Table 4.4 presents current and forecast demand for medical specialists and clinicians in Redland City based on the benchmark provision at the Queensland level. This analysis applies an assumed annual growth rate in the benchmark provision of specialists per 1,000 residents from 2020 onwards, based on the observed growth rate at the Queensland level between 2015 and 2020 (3.1%).

Based on this assessment, there was an estimated shortfall of around 210 medical specialists at June 2021, which implies that regional demand is currently being serviced elsewhere. With the assumed addition of an estimated 45 specialists in known proposed and approved developments (Table 3.4), a shortfall of around 232 specialists is anticipated by 2026.

This is forecast to increase to a shortfall of around 305 specialists by 2031, and an undersupply of around 468 specialists by 2041.

Similar to private hospital and day surgery facilities, demand for (and the shortfall of) medical specialists may be higher than indicated. This is due to the significant proportion of older residents and higher prevalence of long-term health conditions in the Redland City LGA compared to the Queensland level.

Table 4.4: Current and Forecast Demand for Medical Specialists and Clinicians, Redland City LGA, 2021 to 2041

	2021	2026	2031	2036	2041
Redland City LGA Population	161,730	171,754	180,069	186,460	193,270
Benchmark provision per 1,000 persons at QLD Level	2.42	2.67	2.95	3.25	3.59
Demand for Specialists	391	458	531	607	694
Supply of Specialists	181	226	226	226	226
Oversupply (+) / Undersupply (-)	**-210**	**-232**	**-305**	**-381**	**-468**

Source: Table 2.1, Table 4.2, Foresight Partners. Assumes future developments in Table 3.4 are developed by 2026. No allowance for increase in medical specialists provided in existing hospitals. This increase is likely to be insignificant. Assumed increase of 2% p.a. of benchmark provision of specialists where the observed growth rate at QLD level between 2015 and 2020 was 3.1% p.a. Figures may not add due to rounding.

4.2 Aged Care

4.2.1 Industry Overview

Aged care services are delivered primarily through home care, transitional care and permanent residential care. As Australia's population ages, it is expected that the aged care industry will expand significantly. A range of services will need to be offered to meet the diverse needs of the elderly and their individual requirements, preferences and affluence.

As the baby boomer generation begin utilising residential aged care, many will demand greater amenities which they are accustomed to, such as modern design and features, high level services of care, premium catering options, and social activities and excursions.

Technology is also likely to play a greater role in the aged care sector as smart devices are increasingly used to monitor health metrics and allow users to request remote assistance.

According to IBISWorld[11], there were around 5,492 residential aged care establishments in Australia at June 2021, up from 4,748 establishments 10 years prior. Industry revenue is expected to grow significantly over the next five years from $24.7 billion in 2020-21, to $32.4 billion by 2025-26.

4.2.2 Defined Service Area

Similar to the proposed medical facilities, a number of factors will likely influence the catchment from which the proposed aged care facility would draw the majority of its residents. These factors include, but are not limited to:

- The size, amenities and co-located facilities, marketing/brand and services offered (e.g. mid and/or high care, dementia care) at the proposed aged care facility;

[11] IBISWorld Aged Care Residential Service in Australia (August 2021).

- Proximity to residents' family and previous place of residence;
- Accessibility, including facilities for persons with disabilities; and
- The location, size, characteristics and overall appeal of existing aged care facilities nearby.

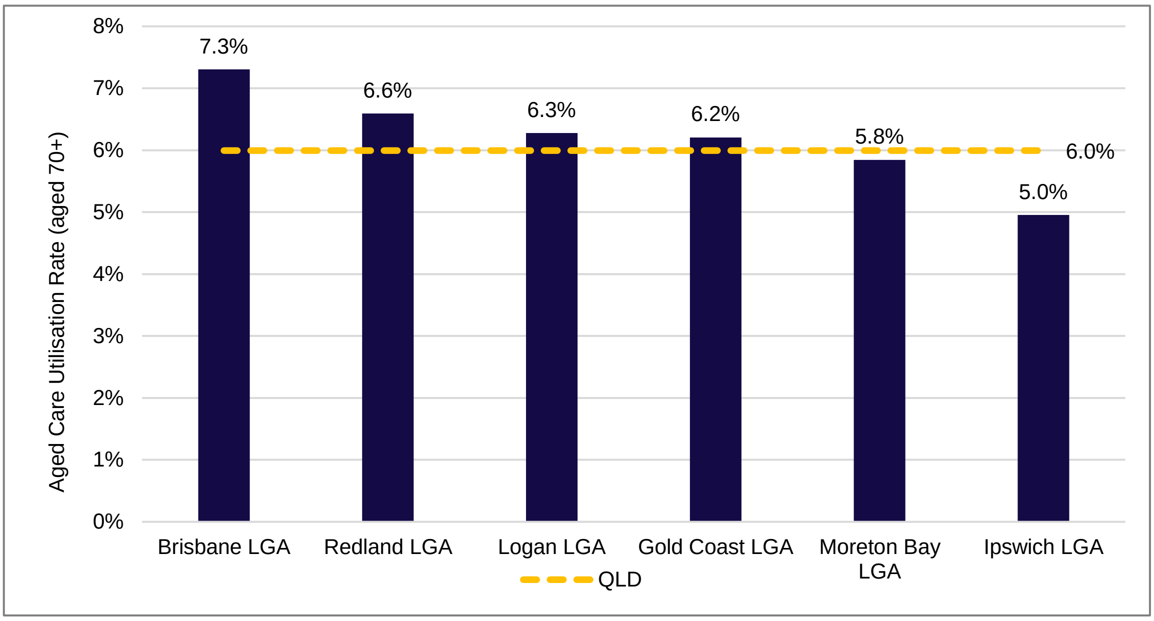
Based on these factors, we estimate that the majority of future residents of the proposed aged care facility would originate from within the Redland City LGA. Accordingly, we have assumed that the main catchment for this facility is the entire Redland City LGA.

Figure 3.4 in Section 3.2 of this report shows the locations of existing aged care facilities in and near the Redland City LGA.

4.2.3 Utilisation Rates

Figure 4.2 sets out the average utilisation rates for residents aged 70 and over in aged care facilities for selected LGAs, as well as the Queensland average as at the 2021 Census. The average aged care utilisation rates for residents aged 70 and over was higher in the Brisbane and Redland LGAs compared to nearby LGAs and the Queensland average.

Figure 4.2: Benchmark Utilisation Rates for Aged Care, Persons aged 70+, 2021



Source: ABS Census 2021, accessed via Tablebuilder. Defined as persons aged 70+ in nursing home or accommodation for the retired/aged (not self-contained) divided by Usual Residents aged 70+.

The Australian Government Department of Health set a target ratio 78 residential aged care places per 1,000 persons aged 70+ by 2021-22[12]. Applying this ratio to the Redland City LGA population aged 70+ implies a *potential* aged care utilisation rate of 7.8% in 2021. This is higher than the utilisation rate observed in the 2021 Census data (6.6%).

[12] Aged Care Financing Authority (ACFA), 2021, Ninth report on the Funding and Financing of the Aged Care Sector, Aged Care Financing Authority.

4.2.4 Current and Forecast Demand

The primary drivers of future demand for aged care facilities in the Redland City LGA will be population growth and the aging population. Table 4.5 sets out the forecast growth in persons aged 70+ in Redland City LGA, and the resultant forecast demand for aged care facilities between 2021 and 2041.

To estimate demand for aged care places, it is considered appropriate to apply the Department of Health target ratio rather than the observed aged care utilisation rate to better reflect potential latent demand.

As at June 2021, there was demand for around 1,815 aged care places in Redland City. This is forecast to increase significantly to around 2,265 places by 2026 and 3,393 places by 2041.

Given the 2021 supply of 1,614 aged care places in the region (Arcare Thornlands opened in 2022 providing 92 places), there was an estimated undersupply of 201 places at June 2021. This is expected to increase to an undersupply of around 433 places by 2026, following the assumed development of 126 approved aged care places noted in Section 3.2. The projected undersupply is forecast to further increase to a shortfall of around 1,561 places by 2041, assuming no further changes in the future supply.

Table 4.5: Forecast Demand for Aged Care Places, Redland City LGA, 2021 to 2041

	2021	2026	2031	2036	2041
Redland City LGA Population	161,730	171,754	180,069	186,460	193,270
Of those, Aged 70+	23,274	29,044	34,794	39,515	43,503
Proportion of Persons aged 70+ in Aged Care	78.0	78.0	78.0	78.0	78.0
Demand for Aged Care Places	1,815	2,265	2,714	3,082	3,393
Supply of Aged Care Places	1,614	1,832	1,832	1,832	1,832
Oversupply (+) or Undersupply (-) of Aged Care Places	**-201**	**-433**	**-882**	**-1,250**	**-1,561**

Source: Table 2.1, Table 3.5, Dept. of Health, Foresight Partners. Figures may not add due to rounding. Assumes development of 126 additional aged care places by 2026. Note: Arcare Thornlands opened in 2022 providing 92 places.

4.3 Retirement Living

4.3.1 Industry Overview

Retirement villages and independent living units (ILUs) are distinctly differentiated from residential aged care facilities. They are a residential lifestyle choice for active people typically aged 50+ who are able to live independently and care for themselves. Retirement living facilities typically provide a range of accommodation options, services and amenities including swimming pools, golf courses, social events and emergency assistance.

Residents move to ILUs and retirement villages for a variety of reasons including reduced financial commitments, sense of community, secure and safe environment, reduced maintenance and downsizing from family homes. Industry research into the mobility behaviour of retirement village residents in South-East Queensland has indicated that there is a tendency for residents to remain within their local area during their retirement years.

Australia's aging population has supported significant growth in the retirement living sector over the past several years. As a result, both the number of enterprises and establishments in the sector has increased. The industry as a whole is expected to continue to grow, given forecast population growth in the target market age group.

According to IBISWorld[13], there were around 2,741 retirement villages in Australia at June 2021, up from around 1,958 villages 10 years prior. This is forecast to increase by around 6% to 2,937 villages in the five years to June 2026.

4.3.2 Defined Service Area

Similar to the proposed aged care facility, a number of factors will likely influence the catchment from which the proposed retirement ILUs would draw the majority of its residents. These factors include, but are not limited to:

- The size, amenities, co-located facilities and marketing/brand of the proposed retirement ILUs;
- The location of the proposed retirement ILUs including proximity to residents' family and previous place of residence, and retail shops and services; and
- The location, size, characteristics and overall appeal of existing competitive retirement living facilities nearby.

Based on these factors, we estimate that the majority of future residents of the proposed retirement ILUs would originate from within the Redland City LGA. Accordingly, we have assumed that the main catchment for this facility is the entire Redland City LGA.

Figure 3.5 in Section 3.3 of this report shows the locations of existing retirement living facilities in and near the Redland City LGA.

4.3.3 Utilisation Rates

Figure 4.3 sets out the average utilisation rates for residents aged 50+ in retirement living and manufactured home estates[14] (MHEs) in selected LGAs and at the Queensland level as at the 2021 Census.

As at the 2021 Census, the average retirement utilisation rates for residents aged 50+ was slightly higher in the Redland City LGA (4.13%) compared to the Queensland level (3.74%).

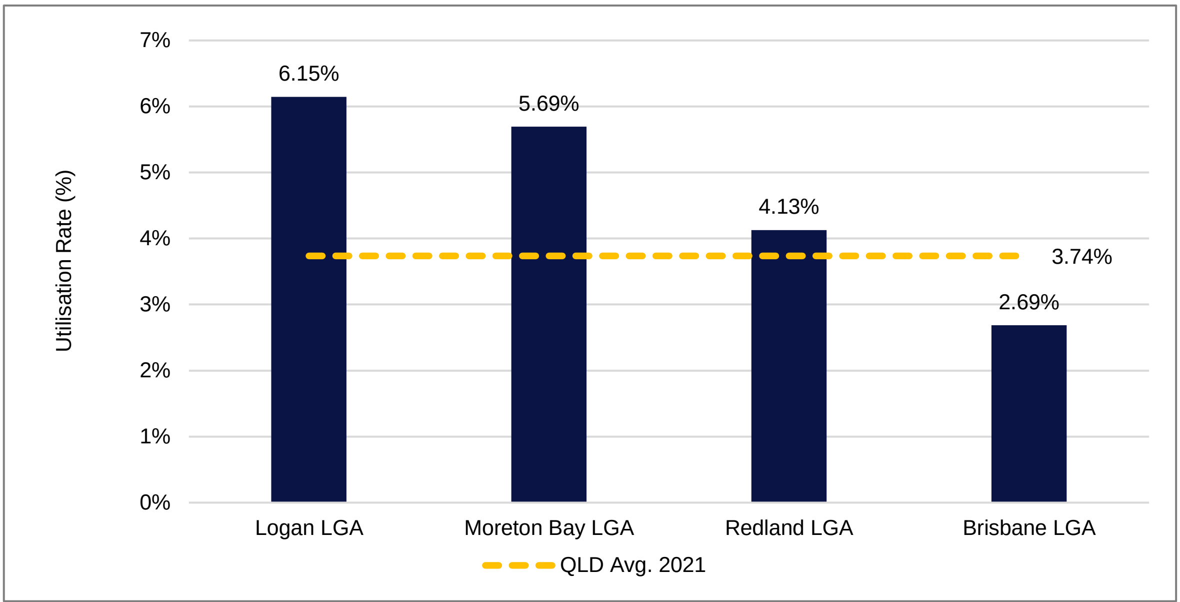
Data from the 2021 Census suggests a total of 2,209 retirement ILUs in Redland City LGA compared to our estimated current supply of 2,071 (Table 3.6). Upon further investigation, we note that Census data includes some residential facilities that are not registered with the State Government Department of Housing and Public Works as Retirement Villages or Residential Parks.

[13] IBISWorld, Retirement Villages in Australia.

[14] MHEs are becoming an increasingly popular retirement living housing option and should therefore be included in the analysis of retirement living utilisation.

This suggests that the retirement ILU penetration rate for the Redland City region may be slightly overstated. We estimate the current retirement ILU penetration rate is around **4%** of residents aged 50+ in Redland City LGA.

Figure 4.3: Benchmark Retirement Living Utilisation Rates, Selected Areas, 2021



Source: ABS Census 2021, accessed via Tablebuilder.

4.3.4 Current and Forecast Demand

Similar to aged care facilities, the primary driver of future demand for retirement living products in the Redland City LGA will be population growth, particularly in the over 50s age group. Table 4.6 sets out the forecast growth in persons aged 50+ in Redland City LGA, and the resultant forecast demand for retirement ILUs between 2021 and 2041. It is assumed that the retirement utilisation rate will increase slowly over time.

As at June 2021, there was demand for around 2,210 retirement ILUs in Redland City. This is forecast to increase significantly to around 3,100 ILUs by 2026, and 6,105 ILUs by 2041.

Given the 2021 supply of 2,071 retirement ILUs in the region, there was an estimated shortfall of around 140 ILUs at 2021.

It is assumed that the 1,113 approved ILUs noted in Table 3.7 will be developed by mid-2026. Considering this, the theoretical surplus of 84 retirement dwellings noted in Table 4.6 represents an average occupancy rate of 97.4%, which is effective full occupancy.

Between 2026 and 2031, demand growth is estimated at around 185 retirement dwellings per year on average. This implies a shortfall of around 100 retirement dwellings by 2027. The projected undersupply is forecast to further increase to around 2,922 ILUs by 2041, assuming no changes in supply (other than the approved ILUs).

Table 4.6: Forecast Demand for Retirement ILUs, Redland City LGA, 2021 to 2041

	2021	2026	2031	2036	2041
Redland City LGA Population	161,730	171,754	180,069	186,460	193,270
Of those, Aged 50+	66,281	74,408	80,548	86,151	91,589

	2021	2026	2031	2036	2041
Proportion of Persons aged 50+ in Retirement ILUs	4.00%	5.00%	6.00%	7.00%	8.00%
Forecast Residents in ILUs	2,651	3,720	4,833	6,031	7,327
Persons per ILU	1.2	1.2	1.2	1.2	1.2
ILU Demand	2,209	3,100	4,027	5,025	6,106
ILU Supply	2,071	3,184	3,184	3,184	3,184
Undersupply (-) of ILUs	**-138**	**84**	**-843**	**-1,841**	**-2,922**

Source: Table 2.2, Table 3.6, Table 3.7, Figure 4.3, Foresight Partners. Assumes future retirement developments in Table 3.7 are completed by 2026. Assumes increase in retirement utilisation rate over time. Figures may not add due to rounding.

Village Comparison Documents suggest that existing facilities are operating at effective full occupancy (over 90% - refer to Table 3.6), and the estimated ~6% vacancy rate across all identified retirement villages in the catchment is likely indicative of natural turnover of ILUs, rather than excess capacity.

4.4 Childcare

The proposed childcare centre will primarily cater to the needs of the estimated 826 FTE on-site employees. It is estimated that around 10% to 15% of on-site FTE workers will demand a childcare place. This implies demand for between 82 to 124 childcare places on-site. The applicant has indicated that development of the proposed childcare centre will be staged to meet demand.

Examples of hospitals with on-site childcare centres include the Prince Charles Hospital (180 places), Greenslopes Hospital (75 places), PA Hospital (75 places) and Mater Brisbane Hospital (263 places). In the Redland City region, there is a 75 place childcare centre opposite the Redland Public and Mater Redland Private Hospitals to meet the needs of the workforce in the local area.

As the proposed childcare centre would primarily meet the needs of the on-site workforce, impacts on existing childcare centres nearby are likely to be minimal. The future workforce on-site would generate new demand for childcare services in the area, additional to resident demand which local childcare centres rely upon.

4.5 Retail

Retail facilities at the subject site will be designed to cater to the needs of the on-site residents, workers and visitors. It is estimated that when completed, there will be around 826 FTE employees on-site, around 230 retirement living residents, and additional visitors and patients. It is considered unlikely that anyone external to on-site workers, residents and visitors will patronise the on-site retail facilities.

Convenience retail facilities that are typically included as part of a private hospital include food and beverage outlets (restaurants, coffee shops and cafes), convenience stores and gift/other stores.

Due to the size and function of the retail components proposed and the on-site market they will serve, potential adverse impacts on existing retail facilities in Redland City are likely to be minimal. It is concluded that the proposed retail component will not threaten the vitality or viability of existing designated centres.

5. POTENTIAL IMPACTS AND ALTERNATIVE SITES

5.1 Impacts on Industry and Open Space Zoned Land

Under the current Redland City Planning Scheme, the 5.18 hectare subject site is split zoned as Light Industry and Recreation and Open Space as shown in Figure 5.1 below. Based on our extraction of the two relevant map features in Redland City Council's Red-E-Map online service, around 3.13 hectares (or 60%) of the subject site is zoned Light Impact Industry with the remainder designated as Recreation and Open Space.

Figure 5.1: Current Zoning of Subject Site, 58-68 Delancey Street, Ormiston

Source: Redland City Council Red-E-Map Online Service.

5.1.1 Industry Zone

To assess the potential impact of the loss of the subject site as Industry zoned land, an analysis of Redland City LGA's existing supply of Industry zoned land was undertaken. Within the region, there are 839 Industry zoned allotments totaling 117.9 hectares across Low Impact, Medium Impact and Waterfront and Marine Industry zoning designations (Table 5.1). In the Low Impact Industry zone, there are around 656 allotments totaling 49.4 hectares.

By comparison, the portion of the subject site zoned as Low Impact Industry represents only around 2.7% of the total supply/quantity of Industry zoned land (117.9 ha) and around 6.3% of the total of Low Impact Industry zoned land (49.4 ha).

Table 5.1: Industry Zoned Land, Redland City LGA

Locality	Lots (No.)	Area (ha.)
Waterfront and Marine Industry Zone		
Thornlands	4	12.4
Total	**4**	**12.4**
Medium Impact Industry Zone		
Cleveland	97	17.4
Redland Bay	82	38.8
Total	**179**	**56.1**
Low Impact Industry Zone		
Redland Bay	6	6.4
Russell Island	40	3.6
Thorneside	33	5.3
Capalaba	577	34.1
Total	**656**	**49.4**
Total Industry Zone	**839**	**117.9**

Source: Redland City Council Red-E-Map, QLD Spatial Cadastral Boundaries, Foresight Partners.

5.1.2 Recreation and Open Space Zone

In the Redland City Council Open Space Strategy 2026 (adopted in December 2012), it is estimated that the Redland City LGA contains around 662 hectares of Recreation and Open Space land[15] (excludes Conservation land). By comparison, the 2.05 hectare portion of the subject site zoned Recreation and Open Space represents around 0.31% of the total supply in the region identified by Council.

5.1.3 Conclusion

In our opinion, the minor loss of land zoned as Low Impact Industry and Recreation and Open Space is little cause for concern. We conclude that the use of the subject site for the proposed development will not have significant adverse impacts on the supply of land in these zonings, and the likely benefits of the proposed development in terms of economic and community need and employment generation would be significant.

5.2 Potential Impacts on the Existing Hospital and Hospital Precinct

As set out in Table 4.3 and Table 4.4, demand for private hospital facilities and medical specialists in the Redland City region is forecast to grow significantly. Considering the current supply of 60 private hospital beds at the Redland Mater Private Hospital, there was a forecast shortfall of around 170 private hospital beds at June 2021. This is forecast to increase to a shortfall of 350 beds by 2041.

Similarly, the estimated undersupply of around 214 medical specialists at June 2021 is forecast to increase to an undersupply of around 646 specialists by 2041.

[15] Redland City Council Open Space Strategy 2026, page 27.

Therefore, growth in demand for these facilities and services is more than sufficient to support both the existing private hospital, and the proposed development. Given this, potential impacts on the viability of the existing Redland Private Hospital are likely to be minimal.

It should be noted that this assessment considers demand for private hospital facilities, in addition to (or exclusive from) demand for public hospital facilities (Table 4.3). There is likely to also be growing demand for public hospital facilities and services in the region.

5.3 Potential Alternative Sites

To demonstrate planning need for the proposed development, an assessment of suitably zoned potential alternatives sites where the proposal could be located was undertaken. In order to efficiently and effectively serve the same purpose and region as the proposal, appropriately zoned (Principal Centre, Major Centre, Specialised Centre) sites in Redland City were identified, then filtered through the following criteria:

- A site size or configuration that could accommodate the development as proposed;
- A location within the urban footprint as defined in the Shaping SEQ Regional Plan; and
- Vacant land or appropriately developed sites.

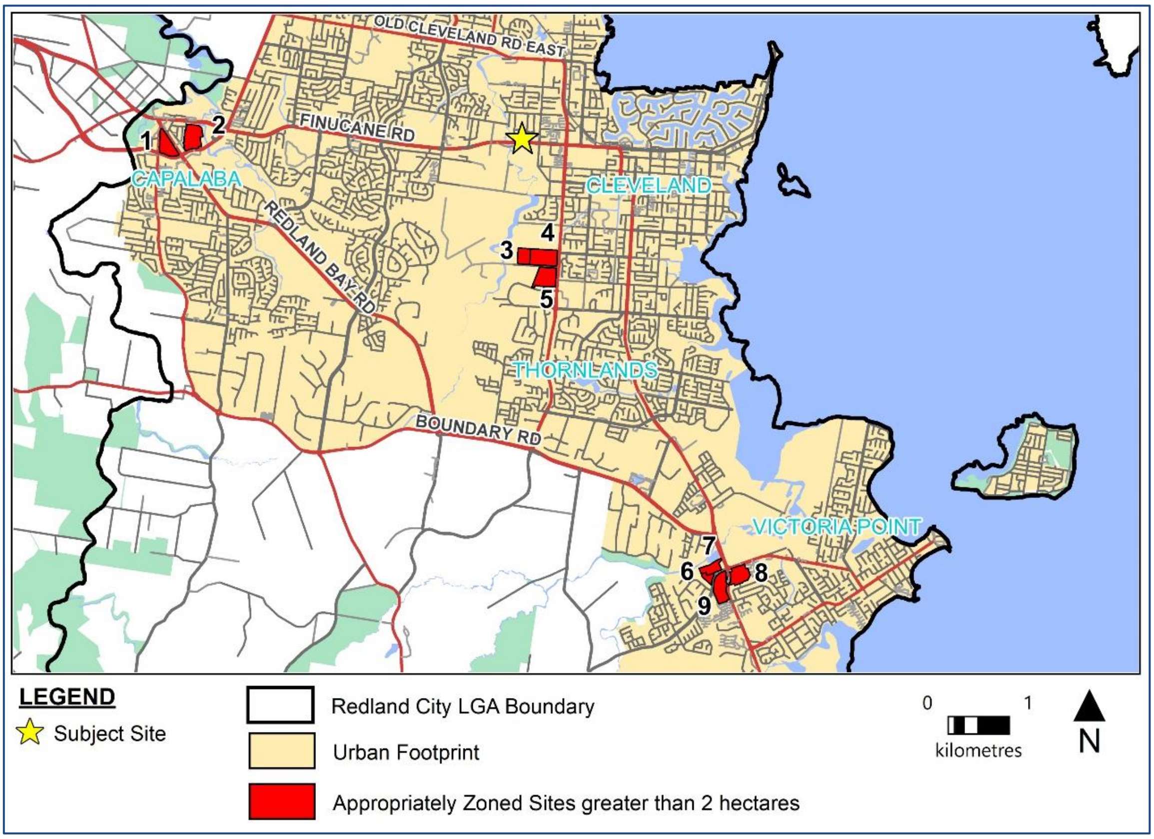
Figure 5.2 shows the locations of appropriately zoned sites larger than two hectares in the Redland City LGA within the urban footprint.

Sites 1 and 2 – There are two Principal Centre zoned sites in Capalaba of approximately 7.56 hectares and 10.05 hectares respectively. The sites are currently occupied by the Capalaba Park Shopping Centre and Capalaba Central Shopping Centre.

Sites 3, 4 and 5 – There are three Specialised Centre zoned sites on Weippin Street, Cleveland around the Redland Hospital Precinct. Site 3 (5.04 ha) at 21-32 Weippin Street is currently undeveloped but is identified by the local and state government as koala habitat. Site 4 (10.96 ha) is occupied by the Redland Public and Mater Private Hospitals and Site 5 (9.78 ha) is occupied by industrial uses (formerly Fisher & Paykel) and the Bayside Community Addiction and Mental Health Service.

Sites 6, 7, 8 and 9 – There are four Major Centre zoned sites at the intersection of Bunker Road and Cleveland Redland Bay Road. Sites 6 (2.01 ha) and 7 (4.82 ha) are occupied by Victoria Point central business district and Lakeside Shopping Centre which comprises a wide range of retailers and professional services. Site 8 (7.61 ha) is occupied by the Victoria Point Town Centre which includes a supermarket, large format retailers, medical centre, tavern and other convenience retail and services. Site 9 (8.92 ha) is occupied by the Victoria Point Shopping Centre.

Figure 5.2: Appropriately Zoned Potential Alternative Sites, Redland City LGA



Realistically, Site 3 at 21-32 Weippin Street is the only logical alternative site where the subject proposal or a new private hospital could be located. However, significant development constraints have been identified that could limit the site's development potential for the proposed uses. These include:

- **Koala Priority Area (SARA Development Triggers[16])** – clearing of more than 500m^2 of vegetation within an area identified as a koala priority area and core koala habitat is considered prohibited development under the State Planning Regulation (2017).
- **State Fish Habitat Areas (SARA Development Triggers)** – waterways identified as a passage for fish must be protected during development. It is noted that a small waterway traverses this site.
- **Environmental Significance (Redland City Council)** – the majority of this site is identified as containing Matters of State Environmental Significance. The intent of PO2 of the Environmental Significance Code identifies that development should not result in a significant reduction to the level or condition of biodiversity and ecological functions and processes in the locality.
- **Flood and Storm-tide Inundation (RCC)** – The waterway traversing the site is subject to flooding. The intent of PO2 of the Flood and Storm-tide Hazard Code

[16] SARA Development Assessment Triggers (Dept. State Development, Infrastructure, and Planning)

identifies that a sensitive use (i.e. hospital) should not be located within a flood or storm-tide hazard area.

- **Regional Infrastructure Corridors and Substations Overlay Code (RCC) –** The majority of the site is located within the waste water treatment plant buffer. PO1 of the code states that development should not increase the risk to community health or safety, or the operation of infrastructure. Additionally, the purpose/overall outcomes of the code state that existing and planned regional infrastructure are to be protected from encroachment by sensitive land uses (i.e. hospital); and does not increase the potential for safety concerns.
- **Bushfire Hazard (RCC) –** The development would need to achieve a radiant heat flux level of 10kW/m2, achieve effective safety and evacuation procedures, and any bushfire mitigation treatments should not have a significant impact on the natural environment or landscape character.

Given these constraints, it is concluded that this site is an inappropriate alternative location for the proposed development.

6. NEED AND COMMUNITY BENEFITS

Need for the proposed development is demonstrated by the following:

- The Redland City LGA population is forecast to grow by around 20%, from around 161,730 at June 2021 to around 193,270 by 2041.
- The Redland City region has a current (at June 2021) undersupply of around 170 private hospital beds and an undersupply of around 14 day surgery beds. This is forecast to increase with population growth to an undersupply of around 350 private hospital beds and 33 day surgery beds by 2041. This is in addition to demand for public hospital facilities.
- There is a current estimated shortfall of around 210 medical specialists in Redland City (as at June 2021). This is forecast to increase to a shortfall of around 305 specialists by 2031, and 468 by 2041.
- There is a current estimated shortfall of around 201 aged care places in Redland City (as at June 2021). By 2026, Redland City will have an estimated undersupply of 433 aged care places. This is forecast to increase with population growth to an undersupply of 882 places by 2031, and 1,561 places by 2041.
- Redland City LGA has a current (at June 2021) undersupply of around 138 retirement ILUs. This is forecast to increase to an undersupply of 843 ILUs by 2031, and 2,922 ILUs by 2041.
- This report demonstrates an immediate need for additional private hospital, day surgery and medical specialist facilities in the region. As discussed in Section 3.1, the Redlands Health and Wellness Precinct (RHWP) is still in the planning stage and cannot be relied upon to provide additional medical services in the region in the next few years, if at all (due to timing, planning, and funding uncertainties).
- Should the RHWP be developed in the future, it will serve a complementary function by providing additional and complementary medical services relative to the subject proposal. Furthermore, there will be sufficient need and future demand for medical services to support both the RHWP and the proposal.
- Forecast growth in demand for private hospital facilities is more than sufficient to support both the existing private hospital and the subject proposal. Therefore, adverse impacts on the existing private hospital are likely to be minimal.
- Given the regional undersupply of the facilities proposed, potential adverse impacts on existing medical, retirement and aged care facilities are likely to be negligible.
- Given the size of the future on-site workforce, retail and childcare facilities are required to adequately cater to workers' needs. As these facilities would cater primarily to demand generated by on-site workers, residents and visitors, potential impacts on existing facilities nearby are likely to be minimal.
- The subject site represents less than 3% of the total quantity of Industry zoned and around 0.3% of Recreation and Open Space zoned land in the region.

Furthermore, the subject site is not a strategically important location for either of these designations and therefore the potential impacts in terms of the loss of Industry and Recreation and Open Space zoned land are likely to be negligible.

- The subject site adjoins other non-residential uses along Shore Street/Finucane Road affording minimal separation distance and isolation.
- There are substantial synergistic benefits of co-locating the proposed uses on the subject site. For example, the proximity of retirement and aged care residents to medical services, and the linkages between the proposed research facility and hospital.
- The proposed development will support the objectives and address the industry issues and gaps identified in the Redland City Council Health Care and Social Assistance Industry Sector Plan. Specifically, the proposal will support training and educational opportunities for the current and future Health Care and Social Assistance workforce, enable collaboration across industry sectors, improve residents' access to better local health and aged care services and address the identified shortage of medical and allied health professionals.
- The only suitably zoned alternative site that could realistically accommodate the proposal (or a private hospital) is at 21-32 Weippin Street, adjoining the Redland Public and Mater Private Hospitals. This site has numerous and significant development constraints and therefore is an inappropriate alternative location for the proposal.

Community and regional benefits of the proposed development include the following:

- **Employment generation –** The proposal is forecast to generate significant employment in the constructional and operational phases.
    - Based on indicative construction costs provided by the applicant, it is estimated that the proposal would generate around 2,880 direct and indirect full-time equivalent (FTE) job years[17] and contribute around $355 million directly and indirectly to Gross Regional Product (Appendix 2).
    - Based on benchmark employment densities for the proposed uses, it is estimated that the proposal would provide around 803 FTE jobs in the operational phase (Appendix 3).
- The proposed development would provide the opportunity to recapture a portion of the Redland City resident workforce that currently leave the region for work. As at the 2021 Census, an estimated 37,183 (or around 48% of total employed residents) Redland City residents were employed in the Brisbane City, Logan City, and Gold Coast City LGAs.
- The proposal would provide employment and training opportunities that align with the skills of the Redland City resident workforce, specifically in the Health Care and Social Assistance industry. As at the 2021 Census, around 51% of Redland City

[17] One FTE job year is the equivalent of one person employed full-time for one year.

residents that were employed in the Health Care and Social Assistance sector, were employed outside the region.

- The proposal will provide a new major medical precinct with modern and high quality facilities to meet the needs of the region's residents in a location that is both convenient and accessible.
- Increased choice and variety in medical, retirement, and aged care facilities in the region.
- The proposal is co-located with an established medical centre which will allow linkages between the existing and proposed uses and synergistic benefits.
- The location of the proposal outside the Weippin Street precinct will reduce congestion and access constraints for medical and health services in the region.
- The provision of a community hub to encourage and enhance social and community interaction.

Conclusion

Based on this assessment, Foresight Partners concludes that there is a current and increasing need for the proposed development, which will generate significant community benefits. Development of the proposal is unlikely to materially impact existing medical, aged care, retirement, childcare, or retail facilities.

APPENDICES

Appendix 1: Resident Workforce by Industry of Employment, Redland City and Queensland, 2016 to 2021

	2016 Census				2021 Census				Change 2016-2021			
	Redland City LGA		QLD		Redland City LGA		QLD		Redland City LGA		QLD	
	(No.)	(%)	(No.)	(%)	(No.)	(%)	(No.)	(%)	(No.)	(%)*	(No.)	(%)*
Primary Industries												
Agriculture, Forestry and Fishing	570	0.8%	60,608	3.0%	527	0.7%	62,444	2.7%	*-43*	*-7.5%*	*1,836*	*3.0%*
Mining	806	1.2%	49,997	2.4%	767	1.0%	55,486	2.4%	*-39*	*-4.8%*	*5,489*	*11.0%*
Industrial												
Manufacturing	5,359	8.0%	128,783	6.3%	5,415	7.4%	140,285	6.0%	*56*	*1.0%*	*11,502*	*8.9%*
Electricity, Gas, Water and Waste Services	795	1.2%	23,884	1.2%	941	1.3%	28,814	1.2%	*146*	*18.4%*	*4,930*	*20.6%*
Construction	8,344	12.4%	191,338	9.4%	9,456	12.9%	222,234	9.5%	*1,112*	*13.3%*	*30,896*	*16.1%*
Wholesale Trade	2,459	3.7%	56,371	2.8%	2,403	3.3%	57,743	2.5%	*-56*	*-2.3%*	*1,372*	*2.4%*
Transport, Postal and Warehousing	4,130	6.2%	108,084	5.3%	4,169	5.7%	115,870	5.0%	*39*	*0.9%*	*7,786*	*7.2%*
Retail & Accommodation												
Retail Trade	7,239	10.8%	211,780	10.4%	7,602	10.4%	226,468	9.7%	*363*	*5.0%*	*14,688*	*6.9%*
Accommodation and Food Services	3,894	5.8%	156,672	7.7%	4,218	5.7%	175,850	7.5%	*324*	*8.3%*	*19,178*	*12.2%*
Service Industries												
Information Media and Telecommunications	908	1.4%	25,267	1.2%	727	1.0%	23,379	1.0%	*-181*	*-19.9%*	*-1,888*	*-7.5%*
Financial and Insurance Services	1,887	2.8%	54,290	2.7%	2,075	2.8%	62,436	2.7%	*188*	*10.0%*	*8,146*	*15.0%*
Rental, Hiring and Real Estate Services	1,343	2.0%	42,502	2.1%	1,336	1.8%	42,931	1.8%	*-7*	*-0.5%*	*429*	*1.0%*
Professional, Scientific and Technical Services	4,097	6.1%	133,652	6.5%	4,680	6.4%	164,129	7.0%	*583*	*14.2%*	*30,477*	*22.8%*
Administrative and Support Services	2,511	3.7%	75,336	3.7%	2,592	3.5%	81,926	3.5%	*81*	*3.2%*	*6,590*	*8.7%*
Public Administration and Safety	4,089	6.1%	140,169	6.9%	4,378	6.0%	150,358	6.4%	*289*	*7.1%*	*10,189*	*7.3%*
Education and Training	5,805	8.7%	192,147	9.4%	6,548	8.9%	216,015	9.3%	*743*	*12.8%*	*23,868*	*12.4%*
Health Care and Social Assistance	8,872	13.2%	276,948	13.5%	11,290	15.4%	375,511	16.1%	*2,418*	*27.3%*	*98,563*	*35.6%*
Arts and Recreation Services	933	1.4%	33,668	1.6%	876	1.2%	37,550	1.6%	*-57*	*-6.1%*	*3,882*	*11.5%*
Other Services	3,024	4.5%	83,470	4.1%	3,400	4.6%	95,768	4.1%	*376*	*12.4%*	*12,298*	*14.7%*
Total	**67,065**	**100.0%**	**2,044,966**	**100.0%**	**73,400**	**100.0%**	**67,065**	**100.0%**	***6,335***	***9.4%***	***290,231***	***14.2%***

Source: ABS Census 2016 and 2021 accessed via Tablebuilder. *Denotes percentage change between 2016 and 2021.

Appendix 2: Forecast Construction Benefits

Category	Estimated Cost ($m)	Estimated Value Added (Gross Regional Product) ($m)			Estimated Employment (FTE Job Years)		
		Direct	Indirect	Total	Direct	Indirect	Total
Construction Costs	$480.0	$172.8	$182.4	$355.2	1,152	1,728	2,880

Source: Hub68 estimates and Foresight Partners.

Appendix 3: Forecast Operational Employment Generation

Use	Approx. Size	Units	Employment Density (workers/unit)	FTE Employees
Private Hospital	22,411	m2		365
Day Surgery	Incl. above			35
Office	4,614	m2	0.02	92
Aged Care	90	Beds	0.5	45
Retirement ILUs	200	ILUs	0.15	30
Childcare Centre	150	m2	0.17	26
Retail	6,213	m2	0.020	124
Aging Research Institute	4,407	m2	0.015	66
Community Group Hub	2,000	m2	0.01	20
Total				**803**

Source: Table 1.1, ABS Census, ABS Private Hospitals Australia 2016-17, IBISWorld Aged Care Residential Service in Australia, IBISWorld Retirement Villages in Australia, Foresight Partners.