Warranty

This report has been based upon the most up to date readily available information at this point in time, as documented in this report. Urban Economics has applied due professional care and diligence in accordance with generally accepted standards of professional practice in undertaking the analysis contained in this report from these information sources. Urban Economics shall not be liable for damages arising from any errors or omissions which may be contained within these information sources.

As this report involves future market projections which can be affected by a number of unforeseen variables, they represent our best possible estimates at this point in time and no warranty is given that this particular set of projections will in fact eventuate.
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EXECUTIVE SUMMARY

Meadowbrook is identified in the South East Queensland Regional Plan as a specialist centre and has several important, regional-level facilities such as the Logan Hospital, a Griffith University campus and Metropolitan South Institute of TAFE. Meadowbrook also has a range of industrial, retail and commercial facilities and is advantageously positioned at the centre of the Brisbane-Gold Coast rail corridor and intersected by the Logan Motorway.

Housing options currently in Meadowbrook are predominantly low density, detached homes, with some student accommodation alongside Griffith University and a retirement village located on Loganlea Road. This Housing Strategy provides a direction and means of diversifying the housing mix in Meadowbrook to assist in it developing as a Specialist Centre focusing on health, research and education. The Housing Strategy has a particular focus on providing housing options for key workers, students and visitors to Meadowbrook.

The Housing Strategy is part of the overall masterplan process for Meadowbrook, as illustrated below.

FIGURE E.1: Meadowbrook Master-plan Process

The growth in housing demand in Meadowbrook is dependent on its ability to realise its Specialist Centre intent. Therefore the Housing Strategy is intrinsically linked to the strategies and direction within the parallel Economic Strategy.

Housing growth in recent years in the Meadowbrook Study Area has been only modest and would be expected to continue at such a level without a specific strategic direction for further housing density in the Study Area. The Loganlea Neighbourhood Plan provides for further density south of the Loganlea rail station and the Housing Strategy provides for further density and housing diversity in the remainder of the Study Area, to service the dwelling needs of key workers, students and visitors to the Meadowbrook Specialist Centre.
A range of housing types is an important component of new knowledge precincts, helping to encourage a professional workforce to live within the precinct, improving affordability and providing temporary accommodation options for the often transient users of the centre.

There are key sites within Meadowbrook that could accommodate higher density dwelling forms, in proximity to the Logan Hospital and Griffith University, both within the centre core and frame areas. As Logan Hospital expands there are opportunities for allied housing forms such as temporary accommodation, supported housing or housing for families of long-term patients. Further student accommodation is expected to be contained on extraneous land within the Griffith University campus. A diversity of housing options is proposed to appeal to a wide range of markets, particularly young professionals, empty-nesters and families.

TABLE E.2 is a summary of the housing strategies recommended as a result of this study.

**TABLE E.2: Housing Strategies**

<table>
<thead>
<tr>
<th>Preferred Outcome</th>
<th>Recommended Guidelines/Options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Key Worker Housing</strong></td>
<td>• Support the development of a town centre (The Hub) or “Central Nervous System” for Meadowbrook to create a sense of activity and place in Meadowbrook</td>
</tr>
<tr>
<td></td>
<td>• Facilitate the development of a diverse range of semi-detached and attached dwelling types throughout Meadowbrook, with higher density living within and proximate to The Hub.</td>
</tr>
<tr>
<td></td>
<td>• Identify strategic sites for high density residential units in The Hub and proximate to the rail station eg. the Riverina site.</td>
</tr>
<tr>
<td></td>
<td>• Apply for funding with the Building Better Cities Program to incentivise the relocation of Riverina to secure this site as a strategic site for release to tender in the medium term.</td>
</tr>
<tr>
<td></td>
<td>• Work with small to medium developers to apply for incentives through the National Rental Affordability Scheme (NRAS) to develop and rent apartments to key worker households in Meadowbrook targeted at 20% less than the market rate to introduce an affordable rental product to Meadowbrook.</td>
</tr>
<tr>
<td></td>
<td>• Advocate for the extension of the NBN to Meadowbrook</td>
</tr>
<tr>
<td></td>
<td>• Develop a networked community within The Hub, with access to cycle facilities, intranet, meeting venues</td>
</tr>
<tr>
<td></td>
<td>• Improve pedestrianised linkages between the Loganlea Neighbourhood Plan area and The Hub and other areas of the Study Area</td>
</tr>
</tbody>
</table>

| **Visitor Accommodation**  | • Identify the Meadowbrook Hotel site as a gateway or signature site for The Hub with potential to accommodate a multi-level accommodation tower. |
|                            | • Facilitate the masterplanning of the Logan Hospital and the securing of additional land for the expansion of the Hospital. |
|                            | • Allow the flexibility of the Logan Hospital masterplan area to accommodate specialist short term accommodation facilities. |
|                            | • Ensure sufficient land area within The Hub to accommodate other short term accommodation facilities, particularly with frontage to Loganlea Road. |
|                            | • Investigate the feasibility of a wellness resort incorporated as part of the redevelopment of the golf course, to target visiting academic/health personnel, event attendees with linkages to the University. |
### Student Housing

Provide secure, affordable housing solutions for students seeking to live and study in Meadowbrook in facilitating a research culture of creating, innovating and sharing knowledge.

- Encourage additional purpose built student housing facilities on surplus Griffith University land.
- Encourage the masterplanning of the Griffith University Logan campus.
- Ensure access and mobility strategies for the masterplan integrate with the proposed Greenlink to promote access to services, retailing and casual/part time jobs in Loganholme for students.

### Diversity of Target Markets

Provide a mix of housing alternatives to support the existing family market and to provide housing that may appeal to “mentors” and senior academic and health personnel.

- Facilitate the development of Golf course/lake frontage land as opportunities for prestige apartments targeting senior professional households.
- Facilitate the development of a retirement complex with linkages to the golf course.
- Provide for the redesignation of rural residential land for medium density housing purposes.
- Encourage a limited array of medium density forms on surplus Griffith University land, particularly with frontage to the golf course/lake.

### Diversity of Lifestyles

Sustainable living in Meadowbrook offers a range of affordable housing designs and locations that reduce the need for multiple vehicle trips, encourage utilisation of public transport, provide opportunities to work from home, and implementation of ESD principles in new dwelling design.

- Investigate opportunities to improve connectivity of the rail station to the remainder of the Meadowbrook area, particularly linking to the Hub and providing strong pedestrian linkages to the rail station.
- Encourage high density residential proximate to the rail station.
- Encourage opportunities for residents to work from home through access to quality ICT infrastructure, meeting spaces and home designs.
- Offer incentives to developers to introduce affordable product through plot ratios and building heights.
- Encourage the inclusion of communal living areas in multi-unit complexes to enhance the sense of lifestyle affordability and to promote a sense of community.
1.0 INTRODUCTION

1.1 BACKGROUND

This Housing Strategy has been prepared by Urban Economics on behalf of Logan City Council, as a mechanism to guide the development and form of housing for the preparation of the Meadowbrook Draft Masterplan.

Meadowbrook is identified in the South East Queensland Regional Plan as a specialist centre and has several important, regional-level facilities such as the Logan Hospital, a Griffith University campus and Metropolitan South Institute of TAFE. Meadowbrook also has a range of industrial, retail and commercial facilities and is advantageously positioned at the centre of the Brisbane-Gold Coast rail corridor and intersected by the Logan Motorway.

Housing options currently in Meadowbrook are predominantly low density, detached homes, with some student accommodation alongside Griffith University and a retirement village located on Loganlea Road.

The Meadowbrook Key Issues Report prepared by AECOM in scoping the situation within Meadowbrook outlines that:

“There is a need to identify housing needs and demands (including housing type, mix, tenure, housing affordability options and key worker and student accommodation options) for the future population of Meadowbrook which will inform the next phase of the master plan. An urban housing analysis would provide a suitable medium to address these issues and identify suitable urban form and appropriate locations for more intense forms of residential development.”

This Housing Strategy assumes that Meadowbrook takes on the mantle of a new knowledge precinct with a health, education and research focus, identifies the mix of housing that supports and indeed promotes the development of the new knowledge centre, and critiques the mechanisms that the masterplan would need to adopt to foster these forms and attract residents to live, work and create within the Meadowbrook new knowledge precinct.
1.2 STUDY OBJECTIVES

The Economic Strategy concluded that creative, knowledge precincts also offer and are enhanced by vibrant places for residents to live, work and create. The clear disconnect between Meadowbrook’s existing population and working markets is considered a significant constraint to the precinct’s evolution as a new knowledge precinct that embraces, stimulates and cultivates innovation, creativity, and knowledge sharing. Significantly, it is not only the physical parameters of the Meadowbrook area that need to be addressed in harnessing the opportunities from its health and education institutions, but also this significant disconnect between the resident and working populations. The Housing Strategy examines the parallels between creative and knowledge precincts and their housing mixes, identifies the potential housing that would appeal to workers within the Meadowbrook precinct, and presents the mechanisms by which the masterplan and planning strategies can influence change in the mix, location, tenure and development of housing in Meadowbrook.

FIGURE 1.1 highlights the Meadowbrook Study Area and existing land use themes.

FIGURE 1.1: Meadowbrook Study Area and Existing Land Use Themes

Source: AECOM, Meadowbrook Key Issues Report
2.0 Methodology

In preparing this Strategy, Urban Economics has undertaken the following staged methodology:

**FIGURE 2.1 Study Methodology**

- **Phase 1 - Inception**
  - meeting with Council
  - collect relevant resources/reports
  - initial site inspections

- **Phase 2 - Planning/Policy Context**
  - review planning policy
  - examine existing mix of housing in Meadowbrook
  - situation analysis to identify external factors influencing demand and supply drivers

- **Phase 3 - Opportunity Analysis**
  - review case study examples
  - stakeholder consultation
  - SWOT workshop

- **Phase 4 - Outcomes**
  - population projections
  - Demographic projections
  - Target market critique
  - Demand Analysis
  - Strategies

- **Phase 5 - Implementation**
  - Reporting
  - development guidelines

The objective of this study was to guide the growth and development of housing options for workers, students and visitors to Meadowbrook, to enhance its role as a specialist employment centre based on the health, research and education sectors. More particularly, recognising that there is a clear disconnect and fragmentation of Meadowbrook’s role as a live and work destination, the Housing Strategy builds on the framework of the Economic Strategy to:

- Identify best practice in housing form and structure in new knowledge precincts
- Identify strategies to attract workers to live and work in the Meadowbrook precinct
- Critique the likely needs of the target markets with a particular vested interest in housing solutions in Meadowbrook including workers in the health and education sectors, visitors and patients at the hospital and students
- Present a series of recommendations as to the form, location of housing and accommodation solutions to meet these needs
- Review constraints to housing development in Meadowbrook
FIGURE 2.2 illustrates the Meadowbrook Housing Strategy’s position within the broader planning for Meadowbrook, including linkages with previous and concurrent studies and the roles of Council officers. Of the concurrent studies, Urban Economics also undertook the Meadowbrook Economic Strategy which informed the issues, constraints and opportunities analysis of the Housing Strategy.

FIGURE 2.2: Meadowbrook Master-plan Process

More particularly, the Economic Strategy prepared a series of employment projections, which were considered indicative of the opportunities for growth in the Meadowbrook precinct. The Strategy also identified the likely mix of land uses, supply chain linkages and opportunities that could be developed in Meadowbrook to build on the inherent opportunities associated with the Hospital, University and TAFE.

Whilst housing was not considered a significant constraint to the development of these institutions and their roles to date, what was discerned through the Economic Strategy was a clear disconnect between the residents living in Meadowbrook and their employment destinations, which were typically outside the Meadowbrook area, whilst workers in Meadowbrook were travelling from a broad area to access employment opportunities in the education and health sectors.

The case study analysis of the Economic Strategy identified a clear relationship between vibrant and active new knowledge precincts and the mix of housing and residential activities that encourage workers to live, work and create within their local area. The Housing Strategy adopts the employment projections prepared by the Economic Strategy, builds on the opportunities and constraints analysis addressed by the Economic Strategy and prepares a series of population projections, and recommendations as to housing form, location, tenure, and target markets to assist in the delivery of the Economic Strategy recommendations and opportunities for the Masterplan.
The Economic Strategy also identified a clear need for short term accommodation facilities to cater for the needs of patients, their families and visitors including visiting specialists, at the Logan Hospital. The Housing Strategy addresses in more detail the particular needs of these groups and the accommodation solutions that can meet these requirements in Meadowbrook.

Fundamental to this Housing Strategy are the following assumptions:

- Meadowbrook does develop as a new knowledge precinct with a health, education and research focus;
- Population projections that have been previously prepared for the Loganlea and Meadowbrook area do not reflect the intent for Meadowbrook to evolve as a new knowledge precinct;
- Housing forms should address the disconnect between residents and workers in Meadowbrook, to attract workers to live and work in Meadowbrook;
- Strategies are in place to attract key workers;
- Expansion of the Logan Hospital is a fundamental driver to the overall development of Meadowbrook as a new knowledge precinct and additional land to secure this ongoing expansion is critical;
- Students are unlikely to be a significant driving force in the demand for housing in Meadowbrook;
- Projections of demand for housing forms are indicative only and presented as a means of illustrating the level of potential take-up, assuming that the strategies and actions of the Economic Strategy are implemented. They assume a movement away from “more of the same” housing forms.

Kerrianne Bonwick, Managing Director of Urban Economics, is the primary author of this study. Other members of Urban Economics’s study team were Anthony Meulman, Senior Consultant, and Tracey Fletcher, Senior Research Analyst. The structure of Urban Economics’s study team for this study was Kerrianne being the primary person responsible for the study, overseeing all aspects of the assignment and undertaking the stakeholder consultation.

The Meadowbrook Housing Strategy included the following tasks and approach:

**Chapter 3 – Strategic Background**

- Review of the findings of the Economic Strategy for Meadowbrook as pertaining to the need for housing;
- Assessment of the overarching drivers that may influence the growth of Meadowbrook, including economic, health and education issues;
- Review of the policy framework underpinning growth in a knowledge precinct at Meadowbrook, including federal, state and local authority policies.
Chapter 4 – Meadowbrook Situation Analysis

- Consideration of existing and potential target markets in Meadowbrook and implications for their housing needs
- Review of the local housing mix in Meadowbrook
- Review of the Meadowbrook Key Issues Report’s findings on housing and population projections
- Review of external environmental factors that may influence the housing mix in Meadowbrook including policy frameworks, economic influences and market conditions

Chapter 5 – Opportunities Analysis

- Critique of best practice case study examples of housing forms in new knowledge precincts
- SWOT analysis of constraints to and opportunities in housing in Meadowbrook
- Conduct of stakeholder consultation to identify key issues and constraints for workers

Chapter 6 – Demand Analysis

- Review of population projections from Meadowbrook Key Issues Report and Loganlea Neighbourhood Plan
- Projection of key target markets
- Review of target market needs, motivations and expectations
- Preparation of demand analyses

Chapter 7 – Recommendations

- Review of the potential marketing mix – target markets, product mix, positioning strategies to deliver housing and accommodation solutions that meet the intent for a new knowledge precinct in Meadowbrook
- Identification of key strategic sites for delivery of alternative housing forms
- Identification of other key strategies and land uses that would be required in Meadowbrook to encourage the development of housing forms other than detached family dwellings
- Critique of other accommodation forms that would complement permanent housing in Meadowbrook

Chapter 8 – Implementation Strategies

- Analysis of strategies, development processes, policy guidelines that can be implemented within the draft masterplan or planning scheme mechanisms to influence the development of alternative housing forms in Meadowbrook.
3.0 STRATEGIC BACKGROUND

Not intended to be a comprehensive analysis of the external environment, this Chapter highlights key issues, policies and challenges that may influence the housing outcomes and the mix of strategies designed to influence housing in the Meadowbrook new knowledge precinct. Additional detail is provided in APPENDIX A and in the Economic Strategy.

3.1 ECONOMIC STRATEGY VISION

Central to the Economic Strategy’s realisation of Meadowbrook as a new knowledge precinct with a health, education and research focus, is the expansion and redevelopment of the Logan Hospital, requiring additional land to support this expansion, and a land use strategy that promotes integration of the Meadowbrook new knowledge precinct. Fundamental to the evolution of a new knowledge precinct is the sharing of knowledge to promote innovation, creativity and development. With a range of disaggregated precincts, two core ingredients for the masterplan for Meadowbrook are the development of a hub or central space for knowledge sharing and attracting workers to live, work and “share” in the precinct.

Lending from marketing analogy, the Economic Strategy has identified that the Hospital is effectively the “Heart” of the new knowledge precinct and the University the “Brains”. The Hub or town centre, which promotes knowledge sharing and dissemination, the collection, collaboration, coordination and integration of ideas could be considered the “Central Nervous System” of the Meadowbrook precinct. Critical to this Hub or Central Nervous System is a critical mass and mix of activities and land uses that will promote a sense of activity, vibrancy and sense of place to encourage and foster collaboration and creativity. Housing and accommodation options are key elements in a vibrant Hub.

The Economic Strategy considered that the following housing elements in and adjacent to The Hub were essential to this sharing and liveability of Meadowbrook:

- Short term accommodation solutions including serviced apartments, hotels and family temporary stay environments (eg Ronald McDonald House etc)
- Higher density living forms including flats/apartments

Similarly, ensuring that there are a range of liveable elements in The Hub – convenience retail, dining and takeaway food options, meeting spaces, will be critical to supporting the viability and liveability of housing and short term accommodation options in Meadowbrook.
A knowledge “spine” connecting the key elements of the precinct to promote the integration and relationship of the various elements and the evolution of a new knowledge precinct, should have a sense of activation and activity which could be achieved through some medium density residential, active travel corridors.

### 3.2 Drivers of Change

There are a range of economic factors that Urban Economics considers may influence demand for and investment in the supply of housing within the Meadowbrook Study Area which have been discussed and critiqued in more depth within the Economic Strategy. The following briefly considers these factors.

**Health Care**

Meadowbrook has been identified as a Specialist Centre based around health, research and education, and a health, education and training opportunity area under the SEQ Regional Plan.

As outlined in the Economic Strategy, Meadowbrook currently attracts a range of uses linked to the health and education orientation of the centre. The Economic Strategy has identified a range of health related businesses, government agencies and supporting uses which have been used to identify potential horizontal or vertical linkage opportunities that may be derived from the current presence of the hospital, university and TAFE. Considerable expansion of the Logan Hospital is expected, and the Economic Strategy has considered the hospital and its aligned health sector services as critical to the evolution of Meadowbrook as a new knowledge precinct. Key opportunities identified by the Economic Strategy that relate to the Housing Strategy include:

- The provision of housing for workers within the health care sector
- Temporary or short term accommodation for visitors and visiting specialists eg. motel and serviced apartments
- Ronald McDonald House or similar for families of young patients
- Supported housing

The Housing Strategy has been prepared on the assumption that significant expansion proposed at the Logan Hospital is undertaken and will influence the nature of housing and accommodation solutions to support the Hospital, its workers, visitors and patients.
**INTERNATIONAL STUDENTS AND STUDENT HOUSING**

With both the MSIT and Griffith University campuses within Meadowbrook, the needs of students were examined by the Economic Strategy. Whilst housing for local students was not considered a significant priority for either campus, and for the English language students at the MSIT, there were some identified opportunities for Griffith University to expand its course offer for international students, which may increase the demand for purpose built student housing proximate to the University. As critiqued within the Economic Strategy, however, Logan would be competing with more attractive destinations such as the Gold Coast for international students, and in a market that has demonstrated significant slowing in the number of international students attracted to Australian Universities in general since 2009, stemming from affordability issues and the global competition that is now on offer.

The growth in internationalisation of education has effectively mirrored globalisation patterns, with the number of students studying outside their home countries increasing from 0.8million in 1975 to a significant 3.7million by 2009 (OECD 2011). Whilst global economic conditions have reduced the level of student activity in seeking international destinations for education, this market is expected to recover as global economic conditions recover, however, a report prepared by Janet Ilieva for the British Council, anticipates growth rates by 2020 to be much slower than those between 2000-2009, primarily as a result of changing demographics and a lower proportion of Chinese in the 15-19 year age brackets.

As a result, whilst there may be some scope for the increase in representation of international students to Australia and potentially to Meadowbrook, significant numbers are not anticipated, however, the Housing Strategy should ensure that student housing needs can be accommodated if required by the Masterplan with a focus on proximity to the University.

The development of an on-campus University Medical School at the Logan Hospital would be a key catalyst in stimulating additional demand for affordable housing for students. Whether this is purpose built student housing or more appropriately accommodated through more traditional rental accommodation, will be examined by this strategy.

**Economic Drivers**

Confidence in the Australian economy remains somewhat subdued, even during a period of low interest rates, low unemployment rates, low inflation and a strong Australian dollar. Whilst the climate may be positive for investment in housing and other infrastructure, there remains a level of reticence or inertia in the economy that is impacting on the property market and the housing market in Queensland. Business confidence levels remain subdued impacting investment decisions in capital and infrastructure, business expansion and employment growth. More entrenched economic fundamentals that may have a longer term localised impact on housing demand and the form of this housing in Meadowbrook include:
- **Resident Workforce** - There has been a disconnect between the resident workforce and the destination of these workers, with residents of Meadowbrook typically working outside the Meadowbrook area and workers in the health and education sectors commuting to Meadowbrook from elsewhere. Additional workers in Meadowbrook and the vision to develop as a vibrant new knowledge precinct, suggest a need for alternative housing forms to attract key workers in the health and education sector.

- **Workforce Changes** – Workforce participation rates have been increasing over time, and the Meadowbrook Study Area exhibited particularly high levels of workforce participation at the time of the 2006 Census, with approximately 73% of the resident population participating in the labour force compared with the BSD average of 68%. The Economic Strategy projected some additional 2,560 jobs in Meadowbrook between 2011 and 2031, almost half of which would be in the health sector.

- **Housing Affordability** The findings of the BankWest Key Worker Housing 2011 report suggest that the median house price in Logan was “unaffordable” for some key workers, with a house price to earnings ratio greater than 5 reported for nurses, fire-fighters and teachers in 2010. Housing was considered affordable for police officers and ambulance officers in Logan. Median house prices in Meadowbrook are greater than the average for Logan City, suggesting increasing pressure for the delivery of housing solutions that represent an affordable lifestyle for key workers in the health and education sectors.

| TABLE 3.1: Housing Affordability for Key Workers in Logan City |
|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
|                 | Ambulance Officers | Fire-fighters | Nurses | Police Officers | Teachers | Median House Price $ (2010) |
| Logan LGA       | 4.4               | 5.9            | 6.1    | 4.5             | 5.8      | 356,500         |

Source: BankWest Key Worker Housing 2011

- **Population Growth Rates** – the Key Issues Report has projected population growth within the Meadowbrook Study Area of some 1,983 persons between 2006 and 2031. This is considered modest and based on a more traditional service role for Meadowbrook that does not take into account the significant expansion opportunities in the health sector that can be delivered with effective planning for Meadowbrook. At a City wide level, Logan is projected to increase by about 163,000 persons between 2011 and 2031.
3.3 Policy and Planning Context

A range of federal, state and local policy initiatives pertaining to housing and to the likely mix of residents seeking to live in the Meadowbrook masterplan area have been investigated in informing the implications for housing outcomes, influencing housing change and strategies to delivery change. APPENDIX A profiles the Federal and State initiatives as they pertain to housing policy in general, and the following highlights the localised regional and local planning instruments that provide background to the planning policies and framework influencing the housing mix in Meadowbrook from an economic perspective.

South East Queensland’s principal planning document, the South East Queensland Regional Plan 2009 – 2031, provides a sustainable growth management strategy for South East Queensland, in order to manage the projected unprecedented population and employment growth within the region.

As the overarching planning document, the SEQ Regional Plan presents a regional vision for SEQ and a series of policies and intentions for the region to support the realisation of this vision. Moreover, it informs state and local government plans and policies. As stipulated within the strategic directions of the SEQ Regional Plan, it is envisioned that a significant proportion of future growth will be accommodated through a combination of infill and redevelopment projects in existing urban areas, concentrated around urban activity centres and public transport corridors and nodes. Also critical to achieving the regional vision is the building of strong and well-serviced communities that have a distinct local character and identity.

The Regional Plan identifies Meadowbrook as an employment area for health, education and technology, stating, “Meadowbrook will be established as a specialist centre based around health, research and education. It will benefit from opportunities generated by the Logan Hospital, Logan TAFE and Griffith University Meadowbrook Campus and access to the Brisbane-Gold Coast railway corridor.”

Logan Planning Scheme 2006

The Logan Planning Scheme 2006 outlines the development regulations and guidelines for Logan City and is one of the tools to be utilised in achieving Logan City's objectives towards a city for families, lifestyle and business. The object of the planning scheme is to guide development in a way that minimises the impacts on the natural environment, including air and water pollution, the economic environment of the city and the cultural and physical environments including aspects of amenity.

Key strategic issues and objectives that particularly reflect housing issues include the intent to offer “a range of accessible lifestyle choices and to pursue community health and wellbeing so as to enhance the quality of life enjoyed throughout the local government area.”
Logan City Council – Growth Management Core Matters

Logan City Council’s Growth Management – Core Matters Report was an initial response to the local government boundary re-alignments of 2008 and is a derivation of the previous Local Growth Management Strategy (LGMS) for the former Logan area. The GMCM sets out a framework for the future planning within Logan over the period 2008-2026.

The GMCM is significantly addressing the challenge of housing affordability through:

- providing for significant housing choice and diversity;
- progressing multiple infill and redevelopment opportunities;
- recommending a significant program of planning and infrastructure to bring land into a development ready state;
- addressing broader household costs by focusing on employment self-containment (trip costs);
- progressing priority greenfield areas;
- building partnerships with the State and Federal government to deliver the necessary infrastructure and services (eg water cycle and transit); and
- working cooperatively and responsibly with the development industry and State Government in accordance with the State Government Housing Affordability Strategy.

The GMCM identifies Meadowbrook (Station Road, Meadowbrook/Loganlea) as a potential redevelopment area, stating “This site is suitable as a redevelopment site due to its proximity to significant facilities, including Logan Hospital, Griffith University, schools, Logan TAFE and assorted commercial and industrial developments. Furthermore, it is in close proximity to the Loganlea railway station which presents good accessibility to public transport, and has good access to the Logan Motorway.”

The GMCM identifies the potential of an additional 280 infill dwellings by 2026, with further infill development to escalate post-2026. This is considered modest in light of the potential for higher density living in Meadowbrook as a result of developing as a Specialist Centre for health, research and education.

Loganlea Neighbourhood Plan

The Loganlea Neighbourhood Plan was released in October 2011 for an area of some 68ha south of the Brisbane-Gold Coast rail corridor. The Loganlea Neighbourhood Plan area is within the Meadowbrook Study Area boundary. The Loganlea Neighbourhood Plan is ultimately intended to accommodate some 5,730 persons, or an additional 4,430 persons on current levels. This is to be achieved through increasing densities through infill development.

FIGURE 3.1 and TABLE 3.2 are taken from the Loganlea Neighbourhood Plan and describe the locations and intents of the different land uses within the Neighbourhood Plan area.
Of relevance to this Housing Strategy is the intent for some significant density south of the rail line, in proximity to Meadowbrook’s town centre. This density would provide housing for commuters working in the Brisbane CBD, but also provides a diversity of housing options that potentially could be taken up by workers within Meadowbrook.

The confidence that the Neighbourhood Plan gives to developers in Meadowbrook, with strong intents for higher density dwelling forms, may provide impetus to economic and housing development elsewhere in the Meadowbrook Study Area.
## TABLE 3.2 Loganlea Neighbourhood Plan Land Use Provisions

<table>
<thead>
<tr>
<th>Precinct</th>
<th>Uses</th>
<th>Plot Ratio</th>
<th>Dwelling/ha</th>
<th>Equivalent QPP Zone</th>
<th>Maximum Building Height</th>
</tr>
</thead>
</table>
| Mixed Use                       | Apartments, scale retail, commercial uses, restaurants, cafes       | Max 2.6  
Min 1.8 | Max 200  
Min 141 | Apartment Residential | 6 storeys |
| Residential (High Density)      | Apartments                                                           | Max 2.6  
Min 1.8 | Max 200  
Min 141 | Apartment Residential | 6 storeys |
| Residential (Medium Density Core)| Medium rise apartments, townhouses                                   | Max 1.8  
Min 0.8 | Max 140  
Min 66 | Apartment Residential | 4 storeys |
| Residential (Medium Density Frame)| Low rise units, townhouses                                           | Max 0.8  
Min 0.5 | Max 65  
Min 41 | Residential Choice | 3 storeys |
| Residential (Medium Density Edge)| Townhouses, duplexes, small lot housing                             | Max 0.5  
Min 0.28 | Max 40  
Min 21 | Residential Choice | 2 storeys |
| Residential (Low Density)       | Detached housing                                                    | Max 0.28  
Min 0 | Max 21  
Min 0 | Residential Living | 2 storeys |
| Open and Community Space        | Park, community uses, stormwater management                         | N/A        | N/A         | Recreation/Other | 2 storeys |

Source: Loganlea Neighbourhood Plan

With heights up to 6 storeys possible proximate to the rail station, there may be opportunities to explore heights in the order of 10-12 storeys within and adjacent to the town centre for Meadowbrook, which will be examined by this Housing Strategy

### 3.4 MEADOWBROOK KEY ISSUES REPORT

The Meadowbrook Key Issues Report (Draft 3, September 2011) was prepared by AECOM as an earlier stage to the Meadowbrook Master-plan process. The report has identified a number of issues of relevance to the Housing Strategy. The following key issues have been summarised from this report.

- The regional planning for Meadowbrook identifies it as a specialist centre based around health, research and education and as an employment opportunity area. Further economic and employment growth would largely relate to these sectors.
- Meadowbrook is intended to serve as a District Transport Hub.
- Future housing opportunities need to consider key worker accommodation to support the hospital’s function, student accommodation and short term accommodation to cater for visiting professionals at the hospital and education facilities or families visiting patients at the hospital. (The impetus for this Housing Strategy)
The following FIGURE 3.1 illustrates the predominant land uses, as identified within the Key Issues Report.

**FIGURE 3.1: Land Use Themes**

The Meadowbrook Key Issues Report includes population and employment projections for Meadowbrook to 2031, in turn taken from the Logan City Employment and Activity Centres Strategy prepared by MacroPlan in 2009. These projections have been utilised as a base in this Housing Strategy, updated to include the first release of the 2011 Census data as at June 2012 but have not been considered finite on the basis of the analysis and opportunities identified by the Economic Strategy.

### 3.5 Implications

This Chapter has identified a range of economic factors that may influence demand for and investment in the supply of housing within the Meadowbrook Study Area.

- With Meadowbrook identified as a Specialist Centre for health, research and education, there are a range of potential linkages between Meadowbrook’s key regional facilities including the Logan Hospital, Griffith University campus and Metropolitan South Institute of TAFE to a range of health related business, government agencies and supporting uses. As identified in the Economic Strategy, there are potential opportunities within Meadowbrook to develop a range of accommodation solutions including housing for workers, short term accommodation, wellness, fitness and recovery accommodation, which will contribute to Meadowbrook’s evolution as a new knowledge precinct with a health and education focus.
The Economic Strategy identified a significant disconnect between the resident population of Meadowbrook and the employed population in Meadowbrook. In creating a vibrant new knowledge precinct, housing of the education and health sector key workers is considered significant and strategies to address the mix and location of housing to attract these workers will need to be addressed by this Housing Strategy.

Housing affordability for Meadowbrook is not focused on ensuring that there is a supply of low cost, affordable housing solutions, rather housing affordability is about the affordability of lifestyle and living environments, particularly for key workers in health and education. Affordability of lifestyle includes housing that is accessible to work and public transport, which is supported by a range of liveability elements – community and recreational facilities, educational opportunities, retail facilities etc. These are key elements to affordable lifestyles that can be embraced by strategies in the Masterplan, through the location and form of housing, the identification of a town centre or hub to promote the liveability of the area.

The policy regime at the state and local level promotes the development of Meadowbrook as a new knowledge precinct that is supported by and supports diversity of housing, including increased density of housing options to take advantage of the breadth of local employment opportunities as well as the district transit station and high frequency rail transport.

The Loganlea Neighbourhood Plan provides for a significant increase in the residential population in the south of the Meadowbrook Study Area. This population would primarily be a commuter population, but the diversity in housing forms would also provide opportunities for workers within Meadowbrook to reside close to their place of work. This would have implications for the demand for worker, visitor and student housing stock within the remainder of the Meadowbrook Study Area.

More particularly, the Housing Strategy will examine opportunities for the Meadowbrook Masterplan to encourage greater densities and building heights particularly within the town centre, with options to explore heights of 10-12 storeys.

With the decline in the Australian international student sector, it is anticipated that any demand for international students is likely to be modest in Meadowbrook due to competition from the CBD and the Gold Coast lifestyle, unless Meadowbrook realises its potential as a specialist centre based around health, education or research - eg. nursing/midwifery, social work etc.

Significantly, development of a medical school on the Hospital Campus is considered a catalyst for affordable housing solutions for students, the nature of which should be examined by this strategy.
4.0 MEADOWBROOK SITUATION ANALYSIS

4.1 EXISTING LAND USES

Urban Economics undertook a land-use survey of Meadowbrook in May 2012 to provide an overview of the mix of activities, users and functionality of the Meadowbrook Study Area, noting the existing mix of housing options, key land uses and activities and the availability of vacant land. The Meadowbrook Study Area comprises a diverse mix of land uses including residential, education, health, commercial, retail, industrial, recreation and conservation land uses. The following provides a brief summary of the residential uses of these investigations. The commercial/retail, industrial, education, health, recreation and conservation land uses are detailed in the Economic Strategy.

Residential

- A low density master planned community representing one of the newer residential uses of Meadowbrook is located to the north of the Study Area, bounded by Loganlea Road, University Drive and the Logan City Golf Club.

- A low density master planned community, also representing one of Meadowbrook’s newer residential communities is located in the centre of the Study Area, between the Logan Motorway and Armstrong Road, excluding the Logan Hospital and MSIT sites.

- Older low density housing is located to the south-west of the Study Area, in the area south of Station Road. This area comprises a mix of units and townhouses and a significant proportion of State owned housing.

- A cluster of rural residential properties is located in the north of the Study Area along Loganlea Road, some of which are located on lots designated for commercial industry in the current Logan City Planning Scheme.
• A purpose-built student housing complex is located at 66 University Drive, within five minutes walking distance of the Griffith University Logan campus. **UniCentral Griffith** is a purpose built student accommodation complex, comprising 4-share fully self-contained units, with each unit containing a common area, 4 private bedrooms, en-suite bathrooms and study desks. The complex provides a range of facilities including a pavilion with pool table and gym, BBQs, tennis court and a 25 metre training pool. The 2012 room rate is priced from $160 per week which includes electricity, telephone connection, internet connection, fortnightly cleaning assistance of the common area and the use of all facilities. Although the complex was purpose built for Griffith University students, students of the MSIT are also welcome.

• The **Meadowbrook Hotel**, located on the corner of Loganlea Road and Logandowns Drive comprises Meadowbrook’s only hotel/motel accommodation. The hotel comprises 20 rooms priced from $80 per night for a double room.

• **Sunnycove Meadowbrook** is a retirement village located at 12 Yeates Crescent, Meadowbrook. The village is comprised of 40 units within a gated complex, catering for persons over 55 years. There were no units available at the time of Urban Economics’s investigations.

• There are no aged care residential facilities located in Meadowbrook. However there is an Anglicare office located on University Drive which offers a range of in-home services including nursing care, personal care, respite services, palliative care and healthy living wellness programs.

Whilst there are some alternative forms of housing, the residential mix of Meadowbrook is dominated by single, detached family homes. The modern, Meadowbrook subdivision that was developed in the late 1990’s presents both the foundation and the constraint to evolution of Meadowbrook as a new knowledge precinct. Whilst on the one hand, the mix of housing represents quality, modern residential subdivision that is positioned differently from surrounding older, established suburbs, there is little diversity of stock to appeal to a broad mix of target markets and to provide choice in living arrangements, tenure forms, price points etc.

### 4.2 Established Housing and Accommodation Market

This section presents a brief overview of the performance of the residential property market in Meadowbrook, including sales of residential property, the rental housing market and the performance of the vacant land market in establishing the framework around which future housing solutions may be established.

Property Data Solutions reports some 654 residential sales in Meadowbrook for the ten year period between June 2002 and June 2012. Figure 4.1 below illustrates the median price of house sales in Meadowbrook for this period.
The volume of house sales over the period between June 2002 and June 2012 has been volatile, with peaks in 2007 and 2002, reflective of nation-wide trends in movements in the housing market and the local availability of stock. Worsening economic conditions as a result of the GFC, coupled with increasing prices are expected to have contributed to the decrease in housing sales since 2007. The median house price has increased steadily between 2002 and 2010, increasing from $180,000 to $392,500, representing an increase of 118%. However post 2010 a downward trend was evident with median house prices decreasing by 5.7% between 2010 and 2011 and a further 8.9% between 2011 and 2012.

FIGURE 4.2 below compares the median house prices in Meadowbrook to the median prices in the surrounding suburbs and the Logan City LGA to gain a better understanding of Meadowbrook’s position within Logan and its target markets.
In comparison to Logan City, Meadowbrook had demonstrated higher median house prices, with differences of approximately 20% higher on average demonstrated between 2002 and 2010. Post 2010 however, Meadowbrook experienced slightly lower median prices compared to Logan City as a whole, as prices eased more in Meadowbrook than the City.

It is also evident that there is a clear price differential between median house prices in suburbs located to the east of the Pacific Highway and those located to the west. Historically, Meadowbrook has largely mirrored the patterns of the higher price ranged suburbs to the east of the highway, reflective of its pattern of development in the mid/late 1990’s in introducing new stock.

Post 2010, with stock to the market dwindling, there has been a demonstrable difference in median prices in Meadowbrook in comparison with suburbs located to the east of the Pacific Highway, whilst maintaining a clear price differential in relation to neighbouring suburbs to the west of the Pacific Highway, including Loganlea, Slacks Creek, Marsden, Kingston and Logan Central. Meadowbrook’s higher median price differential is largely reflective of the newer stock available, the community’s higher than average incomes and the more permanent nature of the community, in comparison to Logan Central and the surrounding area.
The Meadowbrook unit market has exhibited more volatility than the housing market, with median unit prices ranging between $179,900 and $316,250. Prices peaked in 2009 followed by a steady decline as supply became constrained to achieve a median price of $210,000 in 2012.

FIGURE 4.3: Meadowbrook Median Unit Prices 2002-2012

Meadowbrook is an established community with a constrained supply of vacant land available for residential development. Desktop analysis of vacant residential land sales reveal limited sales activity since 2003 with only 8 vacant land sales since this time.

FIGURE 4.4: Meadowbrook Vacant Residential Land Sales 2002-2012
Analysis of approved building applications within Meadowbrook between 2002 and 2010 has revealed a peak in building activity between 2002 and 2004, with very limited building activity since 2005, consistent with the lack of vacant land sales. During the 2002-2010 period, building approvals for Meadowbrook totalled 326 dwellings, with 108 or 33% of these dwellings reported as other dwellings, as summarised in TABLE 4.1 below.

### TABLE 4.1: Historical Building Approvals

<table>
<thead>
<tr>
<th>Year</th>
<th>New Houses</th>
<th>New Other Residential</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002-2003</td>
<td>117</td>
<td>0</td>
<td>117</td>
</tr>
<tr>
<td>2003-2004</td>
<td>88</td>
<td>77</td>
<td>166</td>
</tr>
<tr>
<td>2004-2005</td>
<td>4</td>
<td>31</td>
<td>35</td>
</tr>
<tr>
<td>2005-2006</td>
<td>3</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>2006-2007</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>2007-2008</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>2008-2009</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>2009-2010</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

*Source: ABS*

The Residential Tenancies Authority reported a total of 1,188 rental bonds held in Meadowbrook/Loganlea as at March 2012, representing 4.6% of the total rental bonds held within Logan City. The majority of bonds held within Meadowbrook/Loganlea were for detached houses (60%), followed by townhouses (16%) and flats (14%). Of particular note, there were 101 bonds (8.5%) held for rooming accommodation, representing the current provision of student accommodation and the highest proportion of rooming accommodation recorded of all the Logan City areas. TABLE 4.2 summarises the rental bonds held within Logan City as at March 2012.
### TABLE 4.2: Rental Bonds Held as at 31/03/12 – Logan City

<table>
<thead>
<tr>
<th>Suburbs</th>
<th>Flat</th>
<th>House</th>
<th>Townhouse</th>
<th>Other</th>
<th>Moveable</th>
<th>Aged</th>
<th>Rooming Accommodation</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loganlea/Meadowbrook</td>
<td>166</td>
<td>717</td>
<td>194</td>
<td>9</td>
<td></td>
<td>1</td>
<td>101</td>
<td>1,188</td>
</tr>
<tr>
<td>Kingston/ Logan City/ Trinder Pk/ Woodridge</td>
<td>1,266</td>
<td>1,980</td>
<td>656</td>
<td>17</td>
<td>1</td>
<td>3</td>
<td>21</td>
<td>3,944</td>
</tr>
<tr>
<td>Berrinba</td>
<td>2</td>
<td>129</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>136</td>
</tr>
<tr>
<td>Browns Plains/ Brownsleigh/ Forestdale/Jerome Pk/ Heritage Pk/ Hillcrest/ Regents Pk</td>
<td>141</td>
<td>2,052</td>
<td>305</td>
<td>37</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2,537</td>
</tr>
<tr>
<td>Underwood</td>
<td>62</td>
<td>289</td>
<td>84</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>439</td>
</tr>
<tr>
<td>Priests Gully/ Rochedale/ Boronia Hts/ Greenbank/ New Beith/ Munruben/ Park Ridge/ Chatswood Hills/ Daisy Hill/ Priestdale/ Slacks Ck/ Springwood/ Kimberley Pk/ Logan Hyperdome/ Shailer Pk/ Tanah Merah</td>
<td>140</td>
<td>779</td>
<td>144</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>8</td>
<td>1,073</td>
</tr>
<tr>
<td>Logandale/ Loganholme</td>
<td>72</td>
<td>895</td>
<td>22</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>995</td>
</tr>
<tr>
<td>Carbrook/ Cornubia</td>
<td>33</td>
<td>253</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>289</td>
</tr>
<tr>
<td>Crestmead/ Marsden/ Chambers Flat/ Logan Reserve/ Waterford</td>
<td>558</td>
<td>1,403</td>
<td>526</td>
<td>11</td>
<td>0</td>
<td>2</td>
<td>31</td>
<td>2,531</td>
</tr>
<tr>
<td>Bethania</td>
<td>152</td>
<td>743</td>
<td>147</td>
<td>4</td>
<td>30</td>
<td>0</td>
<td>3</td>
<td>1,079</td>
</tr>
<tr>
<td>Beenleigh/Eagleby/Mt Warren Pk</td>
<td>184</td>
<td>2,192</td>
<td>150</td>
<td>17</td>
<td>0</td>
<td>1</td>
<td>15</td>
<td>2,559</td>
</tr>
<tr>
<td>Jimboomba/ Maclean/ Stockleigh</td>
<td>194</td>
<td>1,004</td>
<td>242</td>
<td>12</td>
<td>15</td>
<td>0</td>
<td>2</td>
<td>1,469</td>
</tr>
<tr>
<td>Logan City Total</td>
<td>4,222</td>
<td>17,443</td>
<td>3,159</td>
<td>174</td>
<td>195</td>
<td>19</td>
<td>338</td>
<td>25,550</td>
</tr>
</tbody>
</table>

Source: Residential Tenancies Authority

The Real Estate Institute of Queensland (REIQ) Market Monitor reported a tight rental market in Logan City for the March 2012 quarter, with a vacancy rate of 2.3% recorded. As a result of the tighter conditions, rental prices are reportedly beginning to increase and vacancies are taking less than a week to fill in some instances. According to the Residential Tenancies Authority, median weekly rents in Meadowbrook have experienced moderate growth since 2010. TABLE 4.3 summarises the median weekly rents and the number of new bonds lodged in Meadowbrook between 2010 and 2012.
TABLE 4.3: Meadowbrook Median Weekly Rents

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>March Quarter 2010</th>
<th>March Quarter 2011</th>
<th>March Quarter 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Rent ($)</td>
<td>New Bonds Lodged</td>
<td>Rent ($)</td>
</tr>
<tr>
<td>1 bedroom flat</td>
<td>217</td>
<td>5</td>
<td>n/a</td>
</tr>
<tr>
<td>2 bedroom flat</td>
<td>n/a</td>
<td>3</td>
<td>230</td>
</tr>
<tr>
<td>3 bedroom flats</td>
<td>260</td>
<td>6</td>
<td>n/a</td>
</tr>
<tr>
<td>3 bedroom house</td>
<td>320</td>
<td>27</td>
<td>315</td>
</tr>
<tr>
<td>4 bedroom house</td>
<td>370</td>
<td>34</td>
<td>375</td>
</tr>
<tr>
<td>3 bedroom townhouse</td>
<td>340</td>
<td>22</td>
<td>345</td>
</tr>
</tbody>
</table>

Source: Residential Tenancies Authority

The existing supply of motel/hotel accommodation within Meadowbrook comprises only one hotel, The Meadowbrook Hotel located on Logandowns Drive, Meadowbrook, diagonally opposite the Logan Hospital. Urban Economics has identified an additional 11 establishments located in Logan City, comprising a mix of 3 to 4.5 star ratings (as per the RACQ Accommodation Guide). The Springwood Tower Hotel and Hotel Gloria, both located in Springwood, comprise the only business standard hotels in Logan City. TABLE 4.4 below provides a detailed summary of each accommodation facility.

TABLE 4.4: Motel/Hotel Accommodation – Logan City

<table>
<thead>
<tr>
<th>Motel/Hotel</th>
<th>Address</th>
<th>Number of Rooms</th>
<th>Price (2pers/night)</th>
<th>STAR Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meadowbrook Hotel</td>
<td>1/7 Logandowns Dr, Meadowbrook</td>
<td>20 rooms</td>
<td>$80</td>
<td>No rating</td>
</tr>
<tr>
<td>Springwood Hotel</td>
<td>Springwood Road, Springwood</td>
<td>12 rooms</td>
<td>$100</td>
<td>***</td>
</tr>
<tr>
<td>Beenleigh Yatala Motor Inn</td>
<td>Pacific Hwy, Cnr Lloyds Lane, Yatala</td>
<td>34 units</td>
<td>$129-$209</td>
<td>****</td>
</tr>
<tr>
<td>Beenleigh Village Motel</td>
<td>49 City Road, Beenleigh</td>
<td>12 units</td>
<td>$95-$100</td>
<td>***</td>
</tr>
<tr>
<td>Browns Plains Motor Inn</td>
<td>30 Anzac Avenue, Hillcrest</td>
<td>25 units</td>
<td>$138-$200</td>
<td>*****</td>
</tr>
<tr>
<td>Johnson Road Motel</td>
<td>120 Johnson Road, Hillcrest</td>
<td>24 units</td>
<td>$130-$180</td>
<td>****</td>
</tr>
<tr>
<td>Brisbane Gateway Resort</td>
<td>200 School Road, Rochedale</td>
<td>22 cabins</td>
<td>$150-$240</td>
<td>****</td>
</tr>
<tr>
<td>Hotel Gloria</td>
<td>14 Carol Avenue, Springwood</td>
<td>60 rooms</td>
<td>$164-$350</td>
<td>No rating</td>
</tr>
<tr>
<td>Springwood Tower Hotel</td>
<td>9 Murrajong Road, Springwood</td>
<td>27 units</td>
<td>$133-$199</td>
<td>No rating</td>
</tr>
<tr>
<td>Waterford Motor Inn</td>
<td>33 Loganlea Road, Waterford</td>
<td>24 units</td>
<td>$110</td>
<td>No rating</td>
</tr>
<tr>
<td>McNivens Logan Park</td>
<td>4170 Pacific Hwy</td>
<td>23 rooms</td>
<td>$110-$200</td>
<td>No rating</td>
</tr>
<tr>
<td>Springwood Motor Inn</td>
<td>145 Barbaralla Drive, Springwood</td>
<td>29 rooms</td>
<td>$115-$225</td>
<td>No rating</td>
</tr>
</tbody>
</table>

Source: RACQ Accommodation Guide 2011/2012
4.3 PROPOSED HOUSING

The Logan City Golf Course, located off Loganlea Road to the north of Griffith University represents a significant land holding within the Meadowbrook Study Area. Consultation with Golf Management Australia (GMA) has revealed plans for redevelopment of the golf course, including significant residential development on the site. As GMA has a 90 year lease agreement with Logan City Council to manage the Logan City Golf Course, it is recognised that a Memorandum of Understanding or Heads of Agreement would be required between GMA and Logan City Council to pursue these opportunities.

A proposal for some 550 residential apartments on Loganlea Road has been submitted to Logan City Council.

While not a specific development proposal, the Loganlea Neighbourhood Plan represents a strong intent for an increase in higher density housing forms in the south of the Meadowbrook Study Area, south of the rail corridor. This intent is likely to be exploited by developers in coming years.

4.4 POPULATION AND HOUSEHOLD GROWTH

The demographic and socio-economic characteristics of the Meadowbrook Study Area have been derived from the 2006 and 2011 Australian Bureau of Statistics Censuses to provide background as to the existing residential profile. As identified by the Economic Strategy, the residential base of Meadowbrook typically works in blue collar industries that do not reflect the health and education sector, and as outlined below the working family characteristics of the Meadowbrook community appear at odds with characteristics of new knowledge precincts, suggesting a need for alternative housing forms in attracting other target markets.

For the purpose of this study, the variables analysed were age structure, income, dwelling type, dwelling tenure, as well as rent and mortgage payments. The analysis was completed for the Meadowbrook Study Area over the period 2006-2011 and for Logan City Local Government Area (LGA) in 2011.

AGE PROFILE

In the Meadowbrook Study Area 31.3% (c.f. 27% QLD) of the population was of school age or younger (0-19 years), a slight decline compared to 33.7% in 2006, but reflecting a population that has remained young over the past five years. These figures indicate that the Study Area has attracted a high incidence of families in the middle stages of life, with a high incidence of dependent children at home, together with older established residents. Persons aged 30 years and over accounted for 52.8% of the population, some 8.2% higher than in 2006.
In 2011 Meadowbrook had a similar incidence of young people in comparison to Logan City. Both Meadowbrook and Logan comprised some 31% of the population within the 0-19 year range, however for persons aged 30 years and over, Logan City comprised 54.7% of its population, 3.5% higher than the Study Area. Overall, both Meadowbrook and Logan City exhibited a similar age structure of the population in 2011, as illustrated in FIGURE 4.5.

**FIGURE 4.5: Meadowbrook and Logan City Age Structure**

![Age Structure 2011](image)

**DWELLING TYPE AND TENURE**

In 2011 the Study Area comprised some 17% of dwellings owned outright, 5.5% higher than in 2006; however some 68% lower than the State average of 29%. Mortgage commitments increased to 39.1% from 37.2% in 2006 and have remained 13% above the State average in 2011, reflective of the relative age of the development of the community. In 2011 rental dwellings accounted for 40.9% of dwellings in the Study Area, a decrease of 11% since 2006. However this category remains some 23% above the Queensland average of 33%.

In 2011 Logan City exhibited a higher incidence of dwellings owned outright and mortgage committed than the Study Area. However rented dwellings were almost 30% lower in the Logan City LGA. FIGURE 4.6 compares the nature of occupancy of dwelling in Meadowbrook to those in the Logan City LGA.
In terms of dwelling types, there has been a more diverse range of product introduced to the Study Area since 2006. In 2006, 100% of dwellings in Meadowbrook were described as separate houses, decreasing to 84% in 2011, but remaining the dominant housing form appealing to families in the young and middle stages of the lifecycle. Semi-detached dwellings comprised 16% of the Study Area’s dwellings in 2011, compared to 8.3% in Logan City. However Logan City exhibited a higher incidence of units (3.2%) than the Study Area.

**INCOME**

The average annual household income in Meadowbrook was $83,970 in 2011, some 10% higher than that in Logan City ($76,630) and 6.5% higher than the Queensland average annual income of $78,860. Between 2006 and 2011, the Meadowbrook Study Area experienced an increase of 30% in the average household income, from $64,790 in 2006. FIGURE 4.7 compares the average annual income of households (2011) in Meadowbrook to those in Logan City and Queensland, indicative that the Meadowbrook Study Area has attracted double income working families.
The average annual mortgage payment in 2011 for the Meadowbrook Study Area was $22,532, 6.1% higher than that in Logan City Area ($21,153) and comparable to the State annual average ($22,527). The average annual rent in Meadowbrook in 2011 was $17,566, which is $2,667 (18%) above the Logan annual rent average. In comparison to the Queensland average rent in 2011, the Study Area was 14.5% higher. FIGURE 4.8 compares the average annual rent and mortgage (2011) in Meadowbrook to those in Logan City and Queensland, which is characteristic of the relative median sales prices of product in Meadowbrook and its attraction for family households.
THE MEDIAN MULTIPLE

The “Median Multiple” is the median house price divided by annual median household income in order to rate housing affordability. TABLE 4.5 summarises the housing affordability categories, as per the Demographia International Housing Affordability Survey.

### TABLE 4.5: Housing Affordability Categories

<table>
<thead>
<tr>
<th>Rating</th>
<th>Median Multiple</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable</td>
<td>3.0 and under</td>
</tr>
<tr>
<td>Moderately Unaffordable</td>
<td>3.1-4.0</td>
</tr>
<tr>
<td>Seriously Unaffordable</td>
<td>4.1-5.0</td>
</tr>
<tr>
<td>Severely Unaffordable</td>
<td>5.1 and over</td>
</tr>
</tbody>
</table>

*Source: Demographia International Housing Affordability Survey*

A Median Multiple of 4.4 has been estimated for Meadowbrook in 2011, which equates to a rating of “seriously unaffordable”, as summarised in TABLE 4.6 below. Logan City was also seriously unaffordable, with a median multiple of 4.5. According to the 8th Demographia Housing Affordability Survey, Brisbane, together with Australia’s other major metropolitan cities with populations greater than 1 million, was rated as severely unaffordable in 2011 with a median multiple of 6.0.

### TABLE 4.6: Housing Affordability 2011

<table>
<thead>
<tr>
<th>Location</th>
<th>Median Multiple</th>
<th>Median House Price</th>
<th>Median Income</th>
<th>Housing Affordability Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meadowbrook</td>
<td>4.4</td>
<td>$370,000</td>
<td>$83,970</td>
<td>Seriously Unaffordable</td>
</tr>
<tr>
<td>Logan City (LGA)</td>
<td>4.5</td>
<td>$345,000</td>
<td>$76,630</td>
<td>Seriously Unaffordable</td>
</tr>
</tbody>
</table>

*Source: Pricefinder, REIQ Market Monitor, ABS*

This suggests that housing for single key workers in health and education sectors would be severely unaffordable and that there is a need for improved diversity of stock to allow for an increased rental pool and alternative forms of housing to cater for knowledge workers in health and education sectors.

### 4.5 IMPLICATIONS FOR HOUSING STRATEGY

- Meadowbrook has experienced strong growth in the property market since 2002, with median house prices peaking at $392,500 in 2010, before tapering slightly in 2011 and 2012. Meadowbrook’s median house prices have on average demonstrated a clear higher price differential in comparison to its surrounding suburbs within Logan City, presenting a means of differentiating product and living solutions in Meadowbrook.
• The demographic and socioeconomic profile of the community reflects a community characterised by families in the early to middle stages of the family life cycle, with high proportions of teenage children and young dependents. Meadowbrook is also characterised by higher than average incomes with dual income families, although the resident workforce appears to be employed in sectors and precincts outside the Meadowbrook area.

• Meadowbrook has a high proportion of rental accommodation and an increasing diversity in accommodation types including a high proportion of rooming accommodation, reflecting the need to cater for short term accommodation, particularly catering to students. However, in attracting professional workers, there is a need for increased diversity of housing and living environments.

• There is currently only one hotel/motel comprising 20 rooms located in Meadowbrook, and a limited additional supply within Logan City, reflecting the need for additional short term accommodation to cater for visitors of the key regional facilities located in Meadowbrook including the Logan Hospital, Griffith University Logan Campus and MSIT. Ensuring a quality supply of short term accommodation facilities that is strategically located proximate to the hospital and within proximity of a mix of leisure and recreational facilities will be a key feature of the housing mix strategies.

• Housing affordability in the Meadowbrook Study Area is relatively better than that in Greater Brisbane, but is still rated as seriously unaffordable, and ensuring the masterplan considers improved diversity of housing stock will be significant in maintaining and improving affordable housing alternatives. Median house to income ratios in the Meadowbrook area suggest a need for improved diversity of housing stock and tenure options to attract new knowledge workers and key workers in the health and education sectors. Access to a range of activities and facilities that contribute to everyday liveability is also considered a significant factor in maintaining affordability in this precinct for new knowledge workers.
5.0 OPPORTUNITIES ANALYSIS

5.1 STAKEHOLDER CONSULTATION

Amongst the institutional stakeholders, the provision of housing was not considered a significant factor particularly for workers. There was certainly a perception that the majority of workers drove to Meadowbrook for their employment and few workers actually lived and worked in the local area. Stakeholders considered that in future planning for these institutions, there was likely to be little change in the workforce patterns, and ensuring that parking provision and the ability for workers to drive from the broader area to work in Meadowbrook was fundamental to the future planning of the individual land uses.

A fundamental shift in the work-lifestyle paradigm in Meadowbrook to radically change the potential for workers to live close to work was almost beyond the realms of possibility for Meadowbrook. A range of key issues identified through the consultation of relevance to this strategy included:

- There was a perceived need for additional alternative housing forms for:
  - Patients and visitors
  - Families of patients
  - Visiting research and academic staff

- Whilst the English College is a significant core component of the study programs at MSIT, the majority of students only study for a short period and utilise the rail service and are unlikely to require localised housing to support their study needs.

- Griffith University’s Logan Campus staff indicated that there are some opportunities for expansion of international student numbers in core or specialist areas eg. commitment of Chinese students to study at the Logan campus, however, this campus could not compete with the Gold Coast or other more “appealing” destinations for significant international student intakes. Housing for students would need to be within walking distance of the University and provide an environment that stimulates interactivity as well as security and convenience.

- The introduction of the proposed Greenlink, linking Meadowbrook to the Hyperdome was considered a significant and critical element for the University for students accessing public transport, shopping and part time or casual employment opportunities and may contribute to an increased perception of the Meadowbrook area and the Logan Campus of Griffith University as an attractive place to study and ultimately live close to their place of study. Significant numbers of students living and studying locally were not anticipated at least in the short to medium term.
• There is capacity at the Griffith University to accommodate a range of housing and accommodation options, with potential consideration by the campus of a Varsity Village type environment. Such a critical mass of activities and housing was perceived to be significant to create the level of interest and activity to appeal to students and staff to live on campus, supported by a range of facilities (e.g. restaurants, cafes, retailing).

• A proposal to develop residential dwellings on the Logan City Golf Course if successful would introduce alternative housing forms, targeting markets that would be new to the Meadowbrook area, including a proposed retirement complex. The potential to explore the development of multi-storey residential development with golf course frontages and views reflects trends around golf courses throughout Australia, and would offer the opportunity for the golf course operators to generate an income to contribute to the ongoing operation and maintenance of the golf course. Such a development is not essentially dependent on other elements of the Meadowbrook precinct, however, may contribute to the diversity of housing, the potential mix of target markets that live and work in Meadowbrook.

5.2 Case Study Critique

Urban Economics has critiqued a range of health and education precincts and centres where health, education and research are used as the key ingredients utilised for economic success.

This Chapter explores examples of these successful health and education precincts in Australia together with the practices, procedures and critical success factors that have helped them establish and what implications this has for the Meadowbrook Specialist Centre. APPENDIX B contains case studies of health and education precincts including Dubai Healthcare City, Green Square Town Centre, Penrith Health and Education Precinct, Westmead Hospital Precinct, Illawarra International Health Precinct, Randwick Health and Education Centre and the Gold Coast Health and Knowledge Precinct.

Case studies or exemplar precincts were selected for examination on the basis of a series of criteria including the co-location of a hospital and university which act as anchor uses, promotion of specialist functions such as health, research, education and technology, and provision of a transport intensive environment or plans for public transport infrastructure.

Critique of best practice examples of established and establishing new knowledge precincts, with a particular focus on health and education precincts, locally, nationally and internationally, identified the following key themes and commonalities:

• Discernible town centre
• Availability of short term accommodation options
• Diversity of target markets including small household sizes
• Diversity of housing stock
• Access to frequent public transport
A discernable town centre with a main ‘spine’ or ‘heart’ and consolidated retail and activity nodes was a common theme amongst the example precincts examined, with these main ‘spines’ and nodes facilitating the provision of a cohesive identity and sense of place for the centre.

The case study precincts exhibited a diverse range of housing stock, with high proportions of flats/units and semi-detached/townhouses in most cases. Strategies to cater for a range of target markets including key workers, students and professional couple households were evident with the provision of hotel accommodation, and a range of accommodation for students, medical and nursing staff, outpatients and relative and aged care facilities.

### TABLE 5.1: Health & Education Precinct Case Study Common Themes

<table>
<thead>
<tr>
<th>Key Themes</th>
<th>Discernable town centre</th>
<th>Short term accommodation options (existing or planned)</th>
<th>Diversity of Target markets</th>
<th>Diversity of housing stock</th>
<th>Access to frequent public transport</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Randwick</strong></td>
<td>The Randwick Town Centre is located immediately to the north-east of the health and education precinct. Centred around Avoca Street, the centre includes the Royal Randwick Shopping Centre, Ritz Cinema and a number of restaurants, retailing, historic buildings and churches.</td>
<td>Boarding houses, Ronald McDonald House</td>
<td>Students, couples, families, older residents, professionals with high incomes</td>
<td>Flats/units, townhouses, separate houses, Ronald McDonald House</td>
<td>Future plans for rail services</td>
</tr>
<tr>
<td><strong>Penrith</strong></td>
<td>Penrith’s town centre is located to the west of the health and education precinct and comprises a number of shopping complexes, including Westfield Penrith Shopping Centre.</td>
<td>Family short stay accommodation, hotel, professional/doctors’ accommodation, carer accommodation</td>
<td>Health and education professionals, students, older residents</td>
<td>Flats/units, townhouses, separate houses, student residences, family short stay accommodation, carer accommodation, retirement village/aged living facilities, professional accommodation, mixed use living</td>
<td>Proposed train station between Kingwood and Werrington, proposed precinct shuttle bus</td>
</tr>
<tr>
<td><strong>Westmead</strong></td>
<td>The University of Western Sydney (UWS) is proposing a new town centre to service the Westmead precinct. The plans for a vibrant town centre comprise a mixed use development which would include offices, shops and housing.</td>
<td>Serviced apartments, corporate/holiday apartments</td>
<td>Young workers, key workers, first home buyers, executives, students</td>
<td>Flats/units, townhouses, separate houses</td>
<td>Westmead Station, Rail bus transit-way service</td>
</tr>
<tr>
<td>Oceanside Kawana</td>
<td>This precinct comprises a Health Hub and higher density residential around mixed use sites.</td>
<td>Serviced apartments, hotel/conference facilities, student accommodation</td>
<td>Students, seniors/aged persons, health professionals, visitors</td>
<td>Palliative care, aged care, retirement village, nursing home, apartments, low-density waterfront residential</td>
<td>Proximate to Coast Connect bus route, Greenlink transport route, the proposed Kawana Transit Precinct, the future train station on Station Road, Kawana</td>
</tr>
<tr>
<td>Illawarra</td>
<td>The precinct will comprise a shopping centre adjacent to the hospital which will comprise retail and commercial space and provide a central meeting place for the precinct.</td>
<td>Outpatient/relatives accommodation (80 serviced apartments)</td>
<td>Students, health and education professionals, visitors to the hospital, older residents</td>
<td>Flats/units, townhouses, separate houses, student accommodation, medical/nursing staff accommodation, serviced apartments</td>
<td>Proximate to Albion Park Rail/Airport and the proposed Penrose/ Huntley railway station</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>The precinct itself does not comprise a discernable town centre. The Southport CBD is located to the east of the health and knowledge precinct comprising a large array of office and commercial uses and Australia Fair Shopping Centre.</td>
<td>Hotels, serviced apartments and holiday apartments are located in Southport, outside of the precinct.</td>
<td>Students, couples, families, health and education professionals</td>
<td>Flats/units, separate houses, student accommodation</td>
<td>Gold Coast Light Rail system will link precinct with other major centres of the Gold Coast</td>
</tr>
<tr>
<td>Dubai</td>
<td>Dubai Healthcare City is located in the heart of Dubai proximate to the famous Wafi Mall and City Centre Mall.</td>
<td>Wellness resort, hotels, serviced apartments, holiday apartments</td>
<td>Executives, couples, families, students, international travellers/professionals</td>
<td>Apartments, serviced apartments</td>
<td>The Dubai Metro Green Line has a designated 'Dubai Healthcare City Station' stop which allows easy access in and out of the precinct.</td>
</tr>
<tr>
<td>Green Square</td>
<td>Urban village concept designed around interlinking public domains including green, open spaces to piazzas and cycle ways/walkways</td>
<td>Serviced apartments</td>
<td>Young professionals with high incomes, families, older residents, students, key workers, diverse ethnic mix</td>
<td>1,2 &amp; 3 bedroom units, separate houses, townhouses</td>
<td>Green Square Railway Station</td>
</tr>
</tbody>
</table>

There is a strong synergy between the anticipated mix of housing in Oceanside (senior accommodation) and the surrounding demographic as well as health care orientation. Housing options in Meadowbrook that reflect and build on the core family demographic present a foundation for improving diversity.
5.3 SWOT Analysis

The Economic Strategy concluded that there is no compelling reason to set quantitative targets on the level of floorspace for commercial, industrial, health and education space that could be supported in Meadowbrook, and similarly for the level of employment that could be supported in the specialist activity centre. Rather flexibility within the masterplan will provide the most effective mechanism to promote the evolution as a new knowledge precinct. Notwithstanding this, the Economic Strategy did identify a series of strategies to limit the level of retailing within Meadowbrook in order to focus the retailing within Meadowbrook as convenience oriented to cater for the needs of residents and workers and to create a sense of local service functionality that does not compete with the higher order retailing of the Logan Central and Shailer Park centres.

Similarly, the Housing Strategy recognises that there is a need for flexibility in the mix of housing and no real compelling reasons to limit the quantum of housing that is developed in Meadowbrook to complement the new knowledge precinct.

However, we would caution the development of a major Varsity Village type of precinct surrounding Griffith University with significant residential and commercial components – such a development would undermine the potential for a viable town centre or hub for the new knowledge precinct and accentuate the disaggregation of the precinct. There do appear to be opportunities for use of surplus university land for residential purposes to cater for the needs of students, visiting researchers and university staff, however, timing and intensity of this development must be considered in light of attracting other residential activity to Meadowbrook.

The following TABLE 5.2 summarises the Strengths, Weaknesses, Opportunities and Threats pertaining to housing and residential options in Meadowbrook. Strengths and Weaknesses are those factors internal to Meadowbrook and its housing mix, whilst opportunities and threats are those factors within the external environment which may influence the development potential, target markets and mix of housing in Meadowbrook.

**TABLE 5.2 SWOT Analysis**

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Modern housing stock</td>
<td>- Dominated by detached housing</td>
</tr>
<tr>
<td>- Dominated by family oriented housing</td>
<td>- No discernible town centre or heart</td>
</tr>
<tr>
<td>- Student oriented accommodation</td>
<td>- Limited diversity of housing stock</td>
</tr>
<tr>
<td>- Retirement Village with high levels of occupancy</td>
<td>- Limited nearby primary schools</td>
</tr>
<tr>
<td>- Meadowbrook Hotel offering after work venue and short-term accommodation</td>
<td>- Established around low density residential estates</td>
</tr>
<tr>
<td>- Includes key anchor uses including Logan Hospital, Griffith University and MSIT</td>
<td>- Limited choice in aged care facilities i.e. no high care aged care facility</td>
</tr>
<tr>
<td>- Excellent access to road networks including Logan and Pacific Motorways</td>
<td>- Limited connectivity to other centres</td>
</tr>
<tr>
<td>- Adjacent to Brisbane-Beenleigh rail line</td>
<td>- Limited short term accommodation</td>
</tr>
<tr>
<td></td>
<td>- Limited cultural vibrancy</td>
</tr>
</tbody>
</table>
- Multiple child care operators
- Extensive open space and recreation areas
- Popular golf course
- Mix of convenience retail to cater for residents and workers
- Mix of takeaway food/fast food for residents and workers
- High school
- Broad range of employment opportunities
- Rail station for commuters

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased diversity and density of residential</td>
<td>Disconnect between residents and jobs</td>
</tr>
<tr>
<td>Golf course residential</td>
<td>Ongoing economic uncertainty</td>
</tr>
<tr>
<td>Serviced apartments to attract visiting research</td>
<td>- Federal funding directed to other centres</td>
</tr>
<tr>
<td>personnel/specialists/families/patients</td>
<td>- Institutional investment directed to other campuses</td>
</tr>
<tr>
<td>Aged care</td>
<td>- Hospital does not have land to expand undermining new knowledge precinct</td>
</tr>
<tr>
<td>YoungCare</td>
<td>- Health City in Greenfield locations attracting investment and jobs</td>
</tr>
<tr>
<td>Ronald Macdonald House</td>
<td>- Significant residential at University and Golf Course undermining capacity to attract</td>
</tr>
<tr>
<td>Hotel/motel</td>
<td>residential to a town centre</td>
</tr>
<tr>
<td>Growth of international students</td>
<td>- Loganlea Neighbourhood Plan directing significant residential development outside Meadowbrook</td>
</tr>
<tr>
<td>Relationship with Logan Central</td>
<td>- Existing housing mix does not appeal to young professionals/couples</td>
</tr>
<tr>
<td>New town centre/core</td>
<td>- Competing with vibrant near city environments for young professional/couple households</td>
</tr>
<tr>
<td>Expansion of Logan Hospital</td>
<td>- Limited availability of state and federal funding for infrastructure</td>
</tr>
<tr>
<td>‘Greenlink’ or improved public transport and</td>
<td>- Potential delays in economic drivers for Meadowbrook, which would dampen demand for housing</td>
</tr>
<tr>
<td>pedestrian access between precincts, major uses,</td>
<td></td>
</tr>
<tr>
<td>town centre and other centres</td>
<td></td>
</tr>
<tr>
<td>Land capacity in several locations for a variety</td>
<td></td>
</tr>
<tr>
<td>of residential stock</td>
<td></td>
</tr>
<tr>
<td>Release of rural residential land for residential</td>
<td></td>
</tr>
<tr>
<td>purposes</td>
<td></td>
</tr>
<tr>
<td>Capacity for residential on excess Griffith</td>
<td></td>
</tr>
<tr>
<td>University land eg. Varsity Village</td>
<td></td>
</tr>
<tr>
<td>High density residential proximate to rail station</td>
<td></td>
</tr>
<tr>
<td>– Riverina site</td>
<td></td>
</tr>
<tr>
<td>Loganlea Road residential</td>
<td></td>
</tr>
<tr>
<td>Loganlea Neighbourhood Plan increases diversity of</td>
<td></td>
</tr>
<tr>
<td>housing types to Study Area and potentially</td>
<td></td>
</tr>
<tr>
<td>provides catalyst to other development</td>
<td></td>
</tr>
</tbody>
</table>
Meadowbrook provides a solid base of housing that has attracted young, working families. There has been a disconnect between the housing that is available in Meadowbrook and the target markets of workers in Meadowbrook, suggesting opportunities to build on the quality of the residential mix in Meadowbrook and the perception of Meadowbrook as offering a quality living environment.

There is developer recognition of opportunities in Meadowbrook, including residential potential, with a range of strategic sites offering potential to introduce greater diversity and density in housing within Meadowbrook. The challenge is in delivering stock that will appeal to target markets for Meadowbrook, particularly in light of the outer suburban nature of Meadowbrook and the range of other alternative destinations effectively competing for comparable target markets.

Short term accommodation solutions are also considered significant in supporting the health services role of the Logan Hospital, in providing opportunities for families to stay close to patients, for patients to recuperate whilst maintaining daily post-operative/care visits to the Hospital, and to attract visiting academic personnel/researchers attached to the University in fostering a research culture within the precinct.

The strategies for fostering housing and accommodation solutions in Meadowbrook have assumed that the initiatives and opportunities identified by the Economic Strategy are implemented and are contributing to an evolution of the precinct as a new knowledge precinct. Complementing this new knowledge precinct are therefore alternative housing and short term accommodation options that will cater for key target markets for Meadowbrook whose needs are not being met within the precinct at this point in time, but who are considered essential for the evolution of the precinct as a new knowledge precinct.

Opportunities for housing and accommodation in Meadowbrook include:

- Short-term accommodation
  - Serviced apartments
  - Hotel
- Ronald McDonald House format for families
- Residential apartments
  - Executive style for professionals
  - Affordable for students
  - 2-3 bedroom for key workers
6.0 **Demand Implications**

6.1 **Population Projections**

The extent of population growth of the Meadowbrook Study Area will depend in part upon the success of the Loganlea Neighbourhood Plan intents, and importantly the strategic direction for the remainder of the Study Area, which is determined through this masterplan process. Therefore the calculation of a projected population growth for Meadowbrook would depend upon assumptions as to the realisation of these strategic plans.

Considerations in assessing the population growth of the Study Area would include:

- There has been modest population growth in the Study Area within recent years;
- The area included in the Loganlea Neighbourhood Plan (October 2011), which is within the Meadowbrook Study Area, is anticipated to ultimately include an additional 4,430 persons on existing levels;
- The Meadowbrook Key Issues Report (September 2011) anticipates a growth of some 1,474 persons on 2011 levels by 2031 to 6,225 persons;
- Urban Economics has calculated that without a strategic intent for Meadowbrook to develop as a knowledge precinct, the Meadowbrook Study Area, excluding the Loganlea Neighbourhood Plan area, is likely to grow at very modest levels, with an additional 350 persons to 2031 and an additional 200 dwellings (see APPENDIX C for details);
- With the Meadowbrook developing as a Specialist Centre for health, research and education, Urban Economics projects that the Meadowbrook Study Area, excluding the Loganlea Neighbourhood Plan area, would grow by about 1,270 persons and 575 dwellings to 2031 on 2011 levels (see APPENDIX C).

The full realisation of the Loganlea Neighbourhood Plan and the higher growth scenario of the remainder of the Meadowbrook Study Area would result in a full Meadowbrook Study Area population of some 9,230 persons by 2031 in some 3,740 dwellings. It may be difficult to achieve the full realisation of the Loganlea Neighbourhood Plan by 2031, therefore the Meadowbrook Study Area population is likely to be less than 9,230 persons, with 8,500-9,000 persons being a more reasonable projection for 2031.
6.2 Demand for Housing in Meadowbrook

Placing effective limits on housing within Meadowbrook will do nothing to foster confidence in the evolution of the precinct as a new knowledge precinct. Some guidance as to potential numbers of dwellings may be useful from a planning perspective, but these can be ascertained through guidelines as to development heights, plot ratios etc.

Rather, in considering demand for housing, the Housing Strategy should take on board the factors influencing demand for housing and present mechanisms within the Strategy to promote these demand opportunities and mitigate challenges to demand.

Assuming that the Economic Strategy vision is realised and that the precinct does attract workers to live, work and create with the Meadowbrook precinct, projections should take into consideration the following issues and drivers:

- An increasing demand for diversity and density of dwelling types
- Increased diversity of target markets living in Meadowbrook
- Evolving household sizes, including smaller single and couple households
- A higher proportion of persons within the Meadowbrook area that are temporary residents seeking accommodation proximate to the hospital and university
- An ongoing propensity for a significant rental housing component of the market
- Opportunities to attract a premium attached to golf course fronting land which may attract new target markets to Meadowbrook
- The major rail station and commuter opportunities to the CBD
- Developer interest in medium density residential in Meadowbrook
- Increasing incidence of key workers including young singles and couple professional households

On this basis, an increase of only 200 households (as projected under the “no strategic vision” for a Specialist Centre scenario) is considered to substantially understate the potential for Meadowbrook as a new knowledge precinct. Moreover, it is Urban Economics’s opinion that there are only limited benefits in preparing detailed population and household projections for Meadowbrook to underpin the Housing Strategy.

Other factors likely to influence the composition and quantum of residents living within the Meadowbrook area include:

- Family households moving into the middle and mature stages of the lifecycle as non-dependent children start to leave home
- Demand for retirement and aged care living is not expected to be significant and represent a critical mass of housing sufficient to support a retirement complex without a major point of difference to attract older residents from elsewhere in Logan to Meadowbrook
• Competition with other outer suburban centre locations that have a greater array of facilities that reflect a “cosmopolitan” lifestyle
• Limits to the level of retail, leisure and entertainment facilities in Meadowbrook may present challenges in attracting a young, professional working demographic.

APPENDIX C does provide some projections of a minimum option scenario if at least some of the opportunities for Meadowbrook eventuate, projecting a significant increase in the representation of semi-attached and attached housing forms (approximately 350 new dwellings).

6.3 HOUSING STRATEGY CONSIDERATIONS

• There are growth opportunities for population within the Meadowbrook Study Area, however, the relevant population and household planning targets appear to considerably understate the population potential of Meadowbrook and its role as a new knowledge precinct. More particularly, there is capacity to attract an increasing student and working population if economic strategies are in place to build on the growth potential of the Logan Hospital and housing strategies are in place to attract a mix of housing types.

• Green Square Town Centre in Sydney has identified a demographic profile of young, professional, high income workers to drive the considerable retail and residential components of the Green Square Town Centre. In doing so, the proponents have also recognised that appropriate retail and leisure facilities are required to attract this demographic to provide a “cosmopolitan” lifestyle. It is almost a “chicken and the egg” scenario – requiring the anticipated demographic to sustain the proposed retail and residential, but also requiring the retail to attract the demographic. Similarly for Meadowbrook, the Housing Strategy will require concerted strategies within the Economic Strategy to drive demand for a more diverse mix of housing, in attracting a younger, professional demographic to promote the lifestyle that will attract this demographic. Whilst Green Square is only 4km from the CBD of Sydney, Meadowbrook is a typical outer suburban Brisbane community for whom density in housing is less familiar, but both scenarios do represent concerted strategies to introduce employment and housing opportunities to cater for growing populations in urban areas.

• There are opportunities to build on the diversity of housing stock within the Meadowbrook Study Area, with tenant demand for affordable living options and diversity of housing styles that accommodate smaller household sizes.

• The broader housing stock should not be limited to the Loganlea Neighbourhood Plan area, which is not well located for students of the University or workers north of the Logan Motorway.
Broadening the residential base of Meadowbrook will require concerted effort to provide a mix of activities that will appeal to professional working households that have traditionally been attracted to inner and near city locations.

There is a need to ensure that the Housing Strategy and housing policies for the Meadowbrook Study Area support the development and promotion of affordable living environments and rental accommodation options within the Area.

Lone person and couple households are expected to increase significantly, but will have differing needs and motivations to the established family market in Meadowbrook, such that the detached 4-bedroom home on a large lot is unlikely to appeal to this segment.

Notwithstanding this, it should also be recognised that building on what already works presents a foundations for implementing change, and recognising the depth of working family households within Meadowbrook should not be disregarded but built on to provide alternative housing forms for young working families. Identifying housing forms that target families should be a key component of the strategy.

Demand for additional purpose built retirement housing from the established Meadowbrook is not likely to be significant and unlikely to be of sufficient scale to sustain a retirement complex with sufficient critical mass of units. However, a retirement concept that is associated with eg. the golf course, or that offers opportunities for whole of life learning, would present a point of difference in product in Meadowbrook that would attract residents from a broader area.
7.0 RECOMMENDATIONS

TARGET MARKETS & HOUSING MIX IMPLICATIONS

Creative precincts or new knowledge precincts attract a mix of residents and workers and the anticipated expansion of the Logan Hospital is expected to drive activity within Meadowbrook, attracting additional workers to the precinct. The Economic Strategy has identified a series of strategies to cater to these workers and enhance the working environment to meet the needs, expectations and motivations of these workers.

The role of the Housing Strategy is to identify the mix of housing to support the intentions and vision of the Economic Strategy and the development of Meadowbrook as a new knowledge precinct through an examination of the mechanisms to guide housing development in Meadowbrook and identification of the tools that the Masterplan can adopt and implement in fostering housing development in Meadowbrook.

The case study examples have identified that critical to the success and vibrancy of new knowledge precincts is the opportunity to share knowledge, contributing to creativity, innovation and evolution of ideas. The ability to live, work and create within these precincts has been a fundamental theme in their development.

A range of target markets has been identified in these precincts, with a focus around young professional single and couple households living, working, recreating and educating within the precincts, but also recognising and building on housing forms that reflect the prevailing demographic.

Key workers

With the Logan Hospital accommodating around 1,700 doctors, nurses and support staff, MSIT supporting around 400 staff at the Loganlea campus and Griffith University employing 200 lecturers, tutors, researchers and support staff, Meadowbrook’s anchor uses alone provide for a significant working population. As noted in the Economic Strategy, these knowledge workers have a unique profile which is provided limited support within Meadowbrook.

Considerable growth in the health and allied health workforce is projected with the expansion of the Logan Hospital, and the Hospital expansion underpins the potential for Meadowbrook as a new knowledge precinct. Whilst the workforce of the Hospital has lived outside the Meadowbrook area, effective, vibrant new knowledge precincts house a local resident workforce, contributing to knowledge sharing and innovation.
As identified in earlier chapters, there is a disconnect between the workers in the precinct and the residents of the Meadowbrook area. Attracting key workers in the health and education sector to live and work in Meadowbrook is considered fundamental to the ethos of an effective and vibrant new knowledge precinct. These key workers will require housing that is affordable, that promotes an affordable lifestyle and a sense of activity and place.

Whilst the existing detached residential subdivision stock may appeal to establishing and established key worker families with dependent children at home, this stock does not necessarily appeal to younger professional single and couple households or working empty-nester households. In other words, the “housing values” of young and empty nester households are likely to be comparable, but would be significantly different to those of established and establishing families.

Young and empty-nester professional households suggest demand for:

- Rental housing
- Smaller floorplate stock
- Lower maintenance requirements eg. garden and external
- Fewer bedrooms
- Access to dining out establishments and meeting places eg. coffee shops, wine bars, sushi train/tapas bars etc.
- Space for entertaining
- Walkable town centres and village centres close to home
- Excellent ICT infrastructure
- Access to sport and leisure facilities
- Storage for active lifestyle “toys” and leisure equipment
- Access to bike paths
- Access to public transport

Other more “cutting edge” elements that would appeal to these key target markets and distinguish Meadowbrook as a new knowledge precinct with a health, education and research focus include:

- Energy and water efficient designs
- “Smart” homes for connected lifestyles
- Networked communities including a “digital town square” for intranet chatting and sharing, options to control systems and appliances remotely, community watch programs
- Access to cultural and artistic programs/activities
- In-house cycle hire/storage facility
- Opportunities for ongoing training and personal development
- Networking functions and venues
Meadowbrook’s suburban location is likely to be particularly challenging in attracting single and couple professional households who have traditionally sought inner and near city locations that offer a sense of vibrancy and activity, proximity to a range of “cosmopolitan” activities and uses, therefore strategies that embrace the suburban location of Meadowbrook coupled with land uses that encapsulate lifestyle will be critical in appealing to these key workers.

**Families**

Meadowbrook currently has a high incidence of families in the middle stages of the life cycle, with the majority of housing classified as detached homes catering to families. The age and quality of this stock suggests that there will be little to no incidence of stock evolving because it has effectively “past its use by date” or no longer meets requirements. Further, there will continue to be a need for detached housing and housing solutions which cater to families.

Housing initiatives and opportunities for building on the core working, family demographic and attracting key worker households include:

- Semi-attached townhouse/terrace homes for smaller (eg. 1 child) families, single parent families etc
- Backyard/play areas
- Multiple bedrooms and bathrooms
- Casual living areas

Other key facilities and expectations for families include:

- Access to schools - Loganlea High School caters to students from grade 8 to grade 12, but it should be noted that there is currently no local primary school located in the Study Area. Primary school students are currently required to attend schools outside of the Study Area, with the closest primary schools being Slacks Creek, Waterford West and Mabel Park.
- Private school and promotion of access to surrounding private schools
- Access to child care
- Access to sporting and recreational facilities
- Park/open space areas

The addition of weekly and top-up shopping facilities will also appeal to these families.

With the increasing incidence of family separation and lower incidence of children per household, some consideration as to alternative housing forms for housing should also be instilled within the Housing Strategy. Ensuring a mix of townhouse developments within the masterplan area would provide the additional choice to cater for evolving family types in Meadowbrook.
Significant expansion of detached housing or traditional residential subdivision is not anticipated as families in the traditional detached stock continue to transition through the family lifecycle, non-dependent children leave the home etc and stock becomes available to new incoming families. No major changes to the existing mix of detached residential are anticipated under the masterplan.

**Health Care and Patient Needs**

The inclusion of a hospital typically attracts visitors from outside the immediate local area who may require short term accommodation services. Expansion of the Logan Hospital will drive additional demand by a range of visitors including patients, their families for short term accommodation solutions during and post treatment, including:

- Overnight accommodation eg. motel/hotel
- Longer stay accommodation options eg. serviced apartments
- Ronald McDonald House or similar for families of seriously ill children, but typically for those travelling more than 50km for treatment

It is recognised, however, that unlike a hospital in a regional town or the larger near City hospitals, the Logan Hospital will primarily service residents of Logan City and southern Brisbane, such that patients are more likely to originate locally and not travel significant distances to access the Logan Hospital. Any short stay accommodation facilities would ideally be within walking distance of the Logan Hospital for both patients/families and health care personnel, and provide access to a range of other convenience type facilities eg. retail, dining etc.

Hospital operational practices are also continuing to require alternative solutions to emergency care, recuperative care, acute care beds for the frail or mentally ill etc. A range of housing alternatives could cater for these markets, although not all are considered conducive to the evolution of Meadowbrook as a new knowledge precinct.

- **Supported housing** offers accommodation solutions for those requiring additional support in maintaining a tenancy either because of physical or cognitive disabilities, abuse issues or financial situations. There are certainly links between supported housing and the health issues of the Logan community, the role of the Logan Hospital, and the research and education interests at the Griffith University. On this basis, the development of supported housing would present a practical housing link between the population health research and health issues presenting within Meadowbrook, suggesting opportunities to promote research programs, outreach programs that would complement the health, education and research focus of Meadowbrook. Supported housing would require partnerships between state housing and community/charitable organisations and potentially the local authority.

With considerable community and government support mechanisms available in Logan Central, there is also an opportunity to foster linkages between supported housing in Logan Central and the research and health base of Meadowbrook. On this basis, whilst some
supported housing could be accommodated in Meadowbrook, it is recommended that the focus be on establishing links and connections between supported housing in Logan Central and the activities, workforce and research in Meadowbrook.

- **Aged Care** – including both low and high level care facilities would present a means of releasing additional beds at the Logan Hospital. When considering the demographic of Meadowbrook, however, there is unlikely to be a significant need for additional low and high level care places in Meadowbrook in the masterplanning period. Again these facilities are perhaps better located in areas such as Beenleigh or Logan Central. Maintaining high levels of access between the health care facilities in Meadowbrook and these areas will be critical and will add to the health role of Meadowbrook.

- **Wellbeing/Recoverative Care** – increasing in popularity in health cities such as Dubai, are resorts particularly tailored to patients seeking elective health care or wellbeing care, which may include weight loss, cosmetic surgery, oral surgery, etc patients. Whilst intensive 24 hour care in-hospital may not be necessary for these patients, ongoing care, support or supervision may be required for a period after surgery. Such accommodation support could be provided through serviced apartments in proximity to the Logan Hospital with support services outsourced including nutritional meal programs, as well as hotel style accommodation providing on site access to meals, gymnasium. This is not likely to be a significant market for the Logan Hospital, but this may present as an opportunity if a private hospital or specialty clinics open in Meadowbrook, and the masterplan should allow the flexibility for these facilities to develop in Meadowbrook to complement these services.

**Students**

Students from the two major post school educational institutions represent a significant cohort of the daily visitors to Meadowbrook. The capacity for Meadowbrook to accommodate a much larger number of students is also of significance. However, it is considered that unless there is a major shift in the arrival of international students to Australia or a concerted push by the University to attract particular core groups of international students, there is unlikely to be a significant need for additional purpose built-student accommodation. Any additional demand could be supported through the development of purpose built accommodation facilities on surplus Griffith University land.

The challenge is that there is a lack of integration between the University and the remainder of the Masterplan area, particularly the future town centre or The Hub, which would provide the level of activity and vibrancy that would appeal to students studying and living in Meadowbrook.

The proposed Greenlink may improve access to services, retailing and casual/part time jobs in Loganholme/Shailer Park for students.
Other critical issues for housing for students for consideration by the masterplan include:

- Security for students
- Walking distance to Griffith University
- Availability of leisure facilities on site
- ICT infrastructure
- Access to cycle paths
- Proximity to venues for socialising

The development of an on-campus medical school at the Hospital would be a critical driver for alternative housing solutions for students, but again student demand is likely to be locally focused suggesting that affordable rental accommodation rather than a critical mass of purpose-built student accommodation would be opportune. Affordable housing options and tenure arrangements including shared living, rental accommodation would appeal to this target market. Townhouses and flats/apartments that offer proximity to the University would cater for any ongoing need for housing for these students.

Purpose built student housing particularly appeals to out of town or international students within the first 6 months of study as they become familiar with their surroundings and establish new social networks.

Housing for MSIT students is not considered significant and does not require particular attention by the Masterplan. Maintaining flexibility to accommodate a campus village on the Griffith University site within the Masterplan recognises that there may be scope for expansion of the University’s specialisation in social heath and nursing for national and international students, or in sports/fitness which may require on-campus short term accommodation.

Other Visitors

The expansion of research activities and programs run by Griffith University would generate a demand for short term accommodation facilities for visiting academic staff, mentors assisting in incubation programs etc, intensive training and professional development attendees, event participants etc.

Potential opportunities explored by the Economic Strategy for the University to build on existing strengths could include:

- Franchise Centre of Excellence hosting specialist events/conferences, intensive training for prospective franchisees, ongoing professional development.
- Nursing/midwifery/social work - hosting of conferences, intensive training or ongoing postgraduate training as a new centre of excellence potentially attracting attendees from outside the local area requiring short term accommodation options.

Short term business standard hotel accommodation and serviced apartment space would cater to these users and does not necessarily need to be on site at the Griffith University campus, however, some connectivity to the campus would be necessary as well as connectivity to a range of cafes/restaurants, meeting spaces and leisure facilities.

**Older Ages**

Older, active retiree age groups seek locations that meet their lifestyle needs whether that be health and wellbeing, proximity to family and social networks, sea-change or tree-change lifestyle alternatives etc.

It is noted that there are only a limited range of specialist retirement developments in Logan City, and there have been challenges in identifying appropriately designated sites to accommodate these developments. Moreover, traditional retirement village products may be somewhat at odds with changing housing expectations of older demographics, suggesting a need for housing alternatives that are evolving to better meet the needs, expectations and motivations of retiree age residents and those approaching retirement age.

The population projections suggest that without concerted effort to particularly target these groups, modest growth in the older age groups is anticipated; however, as outlined in Chapter 6, the population projections are considered conservative and do not necessarily reflect the potential for Meadowbrook to evolve as a new knowledge precinct.

Meadowbrook with an expansive array of health facilities, together with a popular local golf course and a substantial family resident base, has elements likely to appeal to active retirees. A retirement village per-se is not considered to substantially contribute to or reflect a new knowledge precinct, although there are certainly synergies between a retirement development and a major health precinct.

There are opportunities for retirement facilities that embrace wellbeing and whole of life living to reflect active retirement age groups in Meadowbrook, and there are no compelling reasons why retirement complexes should be excluded from the masterplan area. Linkages with the golf course and other recreational facilities are encouraged, and locations outside the core health precinct ideal. A premium is likely to be attached to golf course or lake frontage retirement product, which would reflect a wellbeing intent for Meadowbrook accentuating an active lifestyle.
POSITIONING STRATEGY- CATALYST SITES AND PROJECTS

The positioning strategy for the Meadowbrook Study Area assumes that the development of the Loganlea Neighbourhood Plan area would be in accordance to the intents of the Neighbourhood Plan. It is not proposed to divert from this Neighbourhood Plan. Therefore the strategy focuses on the remainder of the Meadowbrook Study Area. Positioning strategies for the housing mix in Meadowbrook are focused around the locational distribution of housing, the tenure arrangements and improving connectivity within Meadowbrook.

Critical strategies for the location of alternative and additional forms of housing include:

- Purpose built student housing within walking distance and preferably on Griffith University campus;
- Short term accommodation within The Hub, contributing to the vitality of the “central nervous system role” of The Hub for Meadowbrook;
- High density residential within The Hub and proximate to the rail station targeting young professionals and working empty-nester households;
- Mix of housing that offers an affordable lifestyle within The Hub including housing targeting first home buying, rental and affordable key worker housing;
- Location of retirement product with access and frontage to the golf course;
- Premium medium and high density product with frontage and access to the golf course.;
- Medium density housing fronting Loganlea Road to provide a sense of connectivity between activities and land uses.

Timing issues will be critical, for instance, any higher density residential would be premature without the development of the approved shopping centre and attenuating streetscaping to activate a vibrant centre focus. The shopping centre and streetscaping would also provide a catalyst for the early stages of development of the Loganlea Neighbourhood Plan area. The golf course retirement and premium medium and high density products represent medium to longer term projects which would be independent of significant economic development in Meadowbrook, or may offer alternative housing options for senior medical professional/upper management.

A series of catalyst sites and areas have been identified in facilitating growth and activity for residential in Meadowbrook including:

- Land proximate to the rail station presents opportunities for high density residential, with the Riverina site representing a catalyst site for higher density residential. This would complement the high-density intents for the land south of the rail station, within the Loganlea Neighbourhood Plan area. The 1.62ha Riverina site could potentially support 3-4 multi-level towers which may include serviced apartments/business standard hotel.
• The **Meadowbrook Hotel** site represents a key gateway or signature site for The Hub (or heart of Meadowbrook), and capacity to develop a tower on this site, particularly for short term accommodation, is encouraged. It should be noted that this project would require major redevelopment and owner interest and may be difficult for Council to promote through the Masterplan.

• **Griffith University** surplus land presents opportunities for residential targeting workers and potentially students in purpose built student accommodation.

• The **MSIT site** if integrated with the Logan Hospital may present opportunities for on-site residential care including family supported short-term accommodation facilities e.g. Ronald McDonald House, as well as wellbeing stay environments e.g. secure mental health units etc.

• The **“Factory Outlets”** precinct on Logandowns Drive may present opportunities as a mixed use 4-6 storey precinct, comprising commercial and residential

• **Rural residential** land on Loganlea Road is strategically located to provide a mix of affordable townhouse/medium density living arrangements that would cater to families and establishing households.

• Vacant sites to the west of the proposed shopping centre on **Logandowns Drive** are strategically located proximate to “The Hub” to present opportunities for mixed use development, including a mix of commercial and upper level residential, potentially comprising 3 to 4 storey midrise developments adding to the sense of activity around “The Hub”.

• Golf course land presents opportunities for premium residential that may appeal to senior academic and health care staff.

• Residential immediately to the north of the Hospital presents an opportunity for encouraging key worker housing through subdivision 1 into 2, improved access direct to the hospital but a timing issue as stock evolves.
FIGURE 7.1: Catalyst Sites
8.0 Implementation Strategies

In concert with the land use and economic strategies identified within the Economic Strategy report, the following issues particularly related to planning for housing, housing form, tenure arrangements and instigating change in the housing mix of Meadowbrook have been identified. Key housing issues facing Meadowbrook that are addressed by this Strategy include:

- **Housing Key Workers** - the disconnect between the resident workforce and the working population and providing housing that is appropriate to the needs of workers in the precinct.

- **Housing Affordability** – affordable lifestyles and living arrangements, including affordable housing products and tenure arrangements for key workers.

- **Diversity** – there is limited choice in the mix of housing available in Meadowbrook resonating in the limited diversity of residents within the community and limited opportunities to cater for short term residents and visitors to the precinct.

- **Sustainability** – creating opportunities for residents to live proximate to work and reduce the number of vehicle trips outside the Meadowbrook area, and increasing the opportunity to utilise high frequency public transport in Meadowbrook.

The housing strategies in the following TABLE 8.1 have been classified according to the critical success factors which were identified in the Economic Strategy. Of particular importance to the Housing Strategy are Clustering and Cultural Base:

- **Clustering** – The recognisable example of Silicon Valley in California although having an ICT focus provides that by clustering for profit industry with research and development enterprises and similar industry, the uptake and development of new technologies was much faster and commercially desirable. The clustering of health related activities in association with education and research also provides a more recognisable sense of place that would identify Meadowbrook as a precinct for ‘all things health’ within Logan. Creating a sense of activity by co-locating residential with employment is central to this strategy.

- **Cultural base** – All knowledge precincts investigated have not simply been employment areas with a focus on a particular industry area but have catered to those knowledge workers, key workers and student populations who would live, work and play within a vibrant mixed use precinct. Meadowbrook would need to provide a similar environment for these key groups keeping in mind the cultural diversity of the student and worker population already present throughout Logan.
### TABLE 8.1: Housing Strategies

<table>
<thead>
<tr>
<th>Critical Success Factor</th>
<th>Preferred Outcome</th>
<th>Challenges</th>
<th>Recommended Guidelines/Options</th>
<th>Catalyst Sites</th>
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<tbody>
<tr>
<td><strong>Cultural Base</strong></td>
<td><strong>Key Worker Housing</strong></td>
<td>Providing quality, modern accommodation that attracts key workers including emergency services, academic staff, social and health care workers to contribute to the vitality of Meadowbrook as a new knowledge precinct.</td>
<td>• Support the development of a town centre (The Hub) or “Central Nervous System” for Meadowbrook to create a sense of activity and place in Meadowbrook</td>
<td>• Riverina site for multi-level towers</td>
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<td>Instrumental to a new knowledge precinct that stimulates innovation, creativity and research, is the opportunity for the resident workforce to live, work and create within the precinct. Housing forms in Meadowbrook are not conducive to attracting key workers in the health and education sector and there is a clear disconnect between the resident and working populations.</td>
<td>• Facilitate the development of a diverse range of semi-detached and attached dwelling types throughout Meadowbrook, with higher density living within and proximate to The Hub.</td>
<td>• Logandowns Drive for medium rise</td>
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<td>Moreover, attracting single and couple professional households who have traditionally sought inner and near city locations will be a particular challenge in this suburban location.</td>
<td>• Identify strategic sites for high density residential units in The Hub and proximate to the rail station eg, the Riverina site, Logandowns Drive.</td>
<td>• Loganlea Road for Rural Residential</td>
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<td>Housing affordability continues to challenge the living arrangements of workers particularly aligned with the health and education sectors which underpin the economic and employment opportunities in Meadowbrook.</td>
<td>• Apply for funding with the Building Better Cities Program to incentivise the relocation of Riverina to secure this site as a strategic site for release to tender in the medium term.</td>
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<td>• Work with small to medium developers to apply for incentives through the National Rental Affordability Scheme (NRAS) to develop and rent apartments to key worker households in Meadowbrook targeted at 20% less than the market rate to introduce an affordable rental product to Meadowbrook.</td>
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<td>• Advocate for the extension of the NBN to Meadowbrook</td>
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<td>• Develop a networked community within The Hub, with access to cycle facilities, intranet, meeting venues</td>
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<td></td>
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<td></td>
<td>• Improve pedestrianised linkages between the Loganlea Neighbourhood Plan area and The Hub and other areas of the Study Area</td>
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<tr>
<td>Cultural base</td>
<td>Visitor Accommodation</td>
<td>Student Housing</td>
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<tr>
<td><strong>Foster the development of short term accommodation options to cater for the breadth of visitors that would be attracted to a new knowledge precinct of regional significance.</strong></td>
<td><strong>Foster the development of short term accommodation options to cater for the breadth of visitors that would be attracted to a new knowledge precinct of regional significance.</strong></td>
<td><strong>Provide secure, affordable housing solutions for students seeking to live and study in Meadowbrook in facilitating a research culture of creating, innovating and sharing knowledge.</strong></td>
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<tr>
<td>The Logan Hospital on its own and its health focus, is not likely to drive sufficient demand to warrant the development of business standard hotel facilities in Meadowbrook. The three pillars of health, education and research will be critical to supporting quality short term accommodation facilities in Meadowbrook, with the challenge ensuring the integration of short term accommodation with all three aspects of the precinct.</td>
<td>The Logan Hospital on its own and its health focus, is not likely to drive sufficient demand to warrant the development of business standard hotel facilities in Meadowbrook. The three pillars of health, education and research will be critical to supporting quality short term accommodation facilities in Meadowbrook, with the challenge ensuring the integration of short term accommodation with all three aspects of the precinct.</td>
<td>Unless there is a major shift in the arrival of international students to Australia or a concerted push by Griffith University to attract particular core groups of international students eg. health/midwifery students, there is unlikely to be a significant need for additional purpose-built accommodation. Moreover, there is a clear lack of integration between Griffith University and the remainder of the Masterplan area, particularly the future town centre or Hub.</td>
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<td>• Identify the Meadowbrook Hotel site as a gateway or signature site for The Hub with potential to accommodate a multi-level accommodation tower.</td>
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<td>• Encourage additional purpose built student housing facilities on surplus Griffith University land.</td>
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<td>• Support the masterplanning of the Logan Hospital and the securing of additional land for the expansion of the Hospital.</td>
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<td>• Masterplan allows flexibility for “Varsity Village” style residential at and surrounding the Griffith University Logan campus.</td>
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<td>• Encourage the flexibility of the Logan Hospital masterplan area to accommodate specialist short term accommodation facilities.</td>
<td>• Encourage the flexibility of the Logan Hospital masterplan area to accommodate specialist short term accommodation facilities.</td>
<td>• Ensure access and mobility strategies for the masterplan integrate with the proposed Greenlink to promote access to services, retailing and casual/part time jobs in Loganholme for students.</td>
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<td>• Ensure flexibility of Master Plan for land within The Hub to accommodate other short term accommodation facilities, particularly with frontage to Logandowns Drive, Loganlea Road.</td>
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<td>• Ensure access and mobility strategies for the masterplan integrate with the proposed Greenlink to promote access to services, retailing and casual/part time jobs in Loganholme for students.</td>
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<td>• Investigate the feasibility of a wellness resort incorporated as part of the redevelopment of the golf course, to target visiting academic/health personnel, event attendees with linkages to the University.</td>
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<td>• Logan Hospital for short term accommodation fronting Loganlea Road</td>
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<td>Logandowns Drive vacant and factory outlet sites</td>
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**The MSIT site if integrated with the Logan Hospital may present opportunities for on-site residential care including family supported short-term accommodation e.g. Ronald McDonald House, as well as wellbeing stay environments such as secure mental health units etc.**

**Griffith University surplus land presents opportunities for residential targeting students in purpose built student accommodation and some housing for knowledge/academic workers in the west.**
**Cultural base**

**Diversity of Target Markets**

Provide a mix of housing alternatives to support the existing family market and to provide housing that may appeal to “mentors” and senior academic and health personnel.

There is limited choice in housing form in Meadowbrook for downsizing or evolving families and limited opportunities for downsizing empty nester households seeking to live close to families or close to work to live, work and create in Meadowbrook.

- Facilitate the development of Golf course/lake frontage land as opportunities for prestige apartments targeting senior professional households.
- Facilitate the development of a retirement complex with linkages to the golf course.
- Provide for the redesignation of rural residential land for medium density housing purposes.
- Encourage a limited array of medium density forms on surplus Griffith University land, particularly with frontage to the golf course/lake.

- Land proximate to the rail station presents opportunities for high density residential, with the Riverina site representing a catalyst site for higher density residential. This would complement the high density intents for the land south of the rail station, within the Loganlea Neighbourhood Plan Area.
- Rural residential land on Loganlea Road is strategically located to provide a mix of affordable townhouse/medium density living arrangements that would cater to families and establishing households.
- Golf course land presents opportunities for premium residential that may appeal to senior academic and health care staff.

**Clustering**

**Diversity of Lifestyles**

Sustainable living in Meadowbrook offers a range of lifestyles including affordable housing designs and locations that reduce the need for multiple vehicle trips, encourage utilisation of public transport, provide opportunities to work from home, and implementation of ESD principles in new dwelling design.

Poor connectivity between housing, major employment activities and the rail station particularly for the Meadowbrook community and a disconnect between residents of Meadowbrook and the employment opportunities in Meadowbrook fosters a drive culture for residents and workers in Meadowbrook, reducing the sustainability and affordability of living in Meadowbrook for a variety of target markets.

- Investigate opportunities to improve connectivity of the rail station to the remainder of the Meadowbrook area, particularly linking to the Hub and providing strong pedestrian linkages to the rail station.
- Encourage high density residential proximate to the rail station.
- Encourage opportunities for residents to work from home through access to quality ICT infrastructure, meeting spaces and home designs.
- Offer incentives to developers to introduce affordable product through plot ratios and building heights.
- Encourage the inclusion of communal living areas in multi-unit complexes to enhance the sense of lifestyle affordability and to promote a sense of community.

- The Riverina sites presents opportunities for high density residential which would complement the high density intents for the land south of the rail station, within the Loganlea Neighbourhood Plan Area.
- Rural residential land for semi-attached/medium density but excludes commercial to reduce dilution potential.
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Queensland Government, First 100 Day Action Plan,
Queensland Treasury and Trade, Overseas Migration, Queensland 2011
RACQ Accommodation Guide 2011/2012
Real Estate Institute of Queensland (REIQ) Market Monitor, March 2012
Reserve Bank of Australia
Residential Tenancies Authority (RTA)
South East Queensland Regional Plan 2009-2031
APPENDIX A

DEMAND DRIVERS AND CHALLENGES

- **Interest rates** in Australia remain at record low rates, unheralded since the 1970’s, indicative of the capacity of the community to invest, purchase credit and invest in property, goods and services. These low interest rates provided the impetus for markets previously unable to afford to enter the property market to purchase property, stimulating additional demand for goods such as furniture, furnishings and appliances to furnish the property. FIGURE A.1 below represents the historical movement in official interest rates in Australia.

**FIGURE A.1: HISTORICAL INTEREST RATES - AUSTRALIA**

![Cash Rate Target - Interest Rates](source: Reserve Bank of Australia)
• **The unemployment rate** for Queensland as at June 2012 was estimated to be 5.4%. Traditionally, an unemployment rate of 5% has been considered indicative of a full employment environment. However, it has been apparent that unemployment rates during 2008 dropped to record lows of 3.6% in Queensland, generating upward pressures on migration policies, wage rates and an expansion to the available workforce. In particular, this unemployment rate encouraged an expansion of the workforce including female workforce participation, increase in part-time and casual workers and an extension to retirement ages in seeking to expand the workforce. At the time of the 2006 Census, some 5.8% of the resident workforce of the Meadowbrook Study Area was reported to be unemployed.

• **Fluctuating Australian Dollar** – Having attained parity with the USA dollar (Nov 2010) the future movement of the Australian dollar will have significant implications for immigration patterns for short term residents (eg. International students) and permanent residents. In 2008-09, 51% of QLD’s population increase was attributed to overseas migration. However in 2010-11, the estimated contribution of overseas migration to Queensland’s population growth fell to 41.8%. This was less than the estimated contribution of natural increase (48.7 per cent). There were 837 overseas migrants or 27.4% of the population living in Meadowbrook in 2007, as reported in the *Cultural Diversity in Logan City Report* prepared by Logan City Council.

• **International Students** The Australian Bureau of Statistics reported that there were 250,000 international student visa applications granted in Australia in 2010-11, representing a decline of 22% from a peak in 2008-09, but still higher than the 231,000 visas granted in 2006-07. The top five countries of origin for student visas are India, Peoples Republic of China, South Korea, Brazil and Malaysia, as illustrated in FIGURE A.2.
The ABS reported that ‘Management and Commerce’, which includes study fields such as accounting, business and management, and sales and marketing, was the largest broad field of education within international enrolments and commencements in Higher Education in 2010, with about half of enrolments (52%) and commencements (54%) in this field. No other individual broad field of education contributed more than 10% of enrolments or commencements in the higher education sector.

New South Wales comprised the largest proportion of international students in Australia in 2010, with over one-third of all international student enrolments (37%) and commencements (39%) taking place in NSW, followed by Victoria and Queensland.

Despite recent declines in the Australian international education sector, it continues to be an important sector, both in Australia and internationally. In 2009 Australia’s share of the international student market was estimated to be 7%, an increase of more than 2 percentage points from 5.1% in 2000, making Australia the third largest provider of international education services, behind the United States (18%), and the United Kingdom (10%).
• The Australian Government has a number of initiatives set in place to improve the experience of international students, including the Council of Australian Government’s (COAG) International Students Strategy for Australia (2010–2014), and numerous reforms, including the streamlining of visa processing for some international students, and reducing the financial requirements for some student visa applicants.

• **Federal policies** impacting housing are primarily administered under the Department of Families, Housing, Community Services and Indigenous Affairs (FaHCSIA). A familiar focus of these policies involve stimulating economic activity through construction and providing more affordable housing for disadvantaged groups such as low income earners and the homeless.

A current area of interest at the federal level is the growth and management of the not-for-profit housing sector which includes organisations such as the Brisbane Housing Company and the future Logan Housing Company in delivering community housing.

Current policies, initiatives and programs include:

• Social Housing Initiative is a component of the Economic Stimulus Plan and primarily includes funding for the construction of additional social housing stock and upgrading existing stock.

• Housing Affordability Fund provided grants for a range of projects to reduce the cost of new housing. A key result of this funding was the Liveable Compact Cities program which investigated medium density housing in SEQ including transport oriented development. Key findings included the benefits of diversity in housing in increasing access to home ownership and affordability.

• National Rental Affordability Scheme incentivises the delivery of affordable rental accommodation for lower income earners by providing grants and financial offsets for developers and investors who make more affordable rental accommodation available.

• Building Better Regional Cities Program introduced funding to provide trunk infrastructure in areas requiring housing for new residents moving to regional areas and lower income earners already residing in these areas.

• With the election of the LNP to the **State Government** in March 2012, the property and construction sector was identified as one of the ‘four pillars’ for growing the economy.

The **First 100 Day Action Plan** highlighted the Queensland Government’s strategy for Queensland, with a focus on a four pillar economy as well as lowering the cost of living, delivering better infrastructure and planning, revitalising frontline services and restoring government accountability.

The following policy from the First 100 Day Action Plan has the potential to impact upon housing in Meadowbrook.

• Act to remove extra stamp duty of up to $7000 on the family home (beginning 1 July 2012).
• Establish Infrastructure Queensland to advise the state government on long-term infrastructure planning, prioritisation and ongoing management and maintenance

Social Housing Reform options are being explored which will seek to:

• Leverage public housing better for redevelopment and the creation of additional housing

• Make better use of current stock to address under occupancy and abuse of social housing assistance.

State Planning Policy 1/07 – Housing and Residential Development seeks to ensure that local governments identify the housing needs of the local community and plan to establish a range of housing options that respond to these needs

The Urban Land Development Authority (ULDA) is an independent statutory authority which was established by the former Queensland Labor Government in response to the decline in housing affordability in Queensland and to address industry concerns in the planning approval process.

The ULDA sought to achieve a 15 per cent quota of affordable housing within Urban Development Areas (UDA’s). Housing affordability relates to the impact of the prevailing economic, financial and social factors on housing demand and supply that may constrain people from owning or renting a home and represents the underlying costs of developing housing for the market.

The ULDA aims to improve housing affordability by reducing the cost of development through streamlining the development approval process and removing impediments to public and private housing and urban development providers enabling it to bring urban land to market quickly. A variety of lot sizes and dwelling types within a development are also promoted to promote affordability. Smaller house and lot types result in lower price points relative to the traditional lots being produced in the market.

HOUSING AFFORDABILITY

Much has been debated about housing affordability in Australia and the capacity for Australian households to rent or purchase a home. A summary of key reports, findings and strategies is provided below to inform the examination of target markets and product type for Meadowbrook.

Bank West 3rd Key Worker Housing Affordability Report

The Key Worker Housing Affordability Report tracks housing affordability for five groups of key public sector workers – nurses, teachers, police officers, fire-fighters and ambulance officers. An area is classified as unaffordable if its median house price is more than five times the salary of a key worker.

National Centre for Social and Economic Modelling (NATSEM)

The National Centre for Social and Economic Modelling (NATSEM) reported that 9.1% of all households in Australia in 2011 were considered under stress on the basis of the 30/40 rule, with a particularly high incidence of stress for renters (23%). The proportion of Brisbane households defined as stressed under this
rule was estimated to be 7.9% and 11% for the balance of the State (AMP NATSEM Income and Wealth Report July 2011), highlighting the need for policies, practices and processes to ensure the delivery of land and housing solutions that promotes affordable housing.

8th Annual Demographia Housing Affordability Survey 2012

Notably, the 8th Annual Demographia Housing Affordability Survey 2012 rated Brisbane as 68th out of the 81 cities investigated in the major market affordability rankings in Australia, the US, Ireland, Canada, the UK and Hong Kong, with an income to median house price ratio of 6.0. Hong Kong was recorded as the most severely unaffordable at 81st. All 5 of Australia’s major metropolitan cities with populations greater than 1 million, were rated as severely unaffordable. The cities of Bundaberg, Mackay, Rockhampton and Townsville were also rated as severely unaffordable.

Supply factors are considered the critical underlying factor. The Housing Industry of Australia (HIA) stated that between 1993 and 2006, 95% of the cost of a standard house and land product in Australia was attributed to increases in land prices, including acquisition costs and development costs, whilst only 5% was related to house construction costs. (AHURI)

A raft of local, state and federal government policies and strategies have been developed in an effort to address affordability concerns through the release of land, rental schemes, equity purchase schemes, and planning for diversity and density of stock. More particularly, the health and education focus of Meadowbrook suggests an opportunity to provide housing for health and education sector workers or “key workers” for whom housing affordability may be a critical issue in their location decisions.
**Logan Housing Company**

The Logan Housing Company is an initiative of Logan City Council and the Queensland Government Department of Communities, working together to establish an independent, not-for-profit, charitable company to deliver affordable housing in the Logan region. The project is still in the early stages and details about location, eligibility and rental costs are yet to be finalised.

It is envisaged that the company will perform a key role in revitalising existing social housing in Logan and developing new affordable homes for eligible households to rent or buy.

The Logan Housing Company would:

- work with existing community stakeholders to deliver services to clients in Logan
- provide both social and affordable rental housing for eligible applicants on the Department of Communities - Social Housing Register for the duration of their need
- become a developer of affordable housing for rent or purchase, with a particular focus on social housing redevelopment and urban renewal projects.
APPENDIX B

CASE STUDIES

Dubai Healthcare City

Dubai’s Healthcare City is a strategic development targeted at the growth in medical tourism. Leveraging Dubai’s locational advantages between Europe and Asia as well as tax advantages and ‘free zones’, Healthcare City is able to cater for foreigners seeking medical care with benefits that cannot be recognised in their home countries.

Healthcare City’s cluster economy is based around a university medical complex; consisting of a university specialty hospital, a post-graduate medical school and nursing school, and a life science research centre. Supporting industries include private practices, wellness clinics and post operation recovery rooms which are more reflective of 5-star hotels and all benefit from heavy tax concessions.

Target markets include executives, couples, families, students and international travellers and professionals.

The housing stock is predominantly apartments and serviced apartments including a range of bedroom sizes.

The development is well serviced by public transport, with the Dubai Metro Green Line including a designated ‘Dubai Healthcare City Station’ stop which allows easy access in and out of the precinct.
Gold Coast Health and Knowledge Precinct

With one of the fastest growing populations in Queensland, the Gold Coast required the expansion of its health delivery services. The decision was made to build the 750 bed Gold Coast University Hospital (GCUH) adjacent to the Gold Coast campus of Griffith University in creation of a health and knowledge precinct which would not only increase the level of health services available, but also cluster education and research capabilities that enhance the operations of these uses.

With completion of the GCUH due at the end of 2012, the precinct will include a range of new facilities and uses which are complimentary to knowledge precincts.

- Griffith University is currently constructing the Griffith Health Centre which will allow the university to house its health education and research operations under the one roof, streamlining delivery and creating synergy within the cluster.
- The Gold Coast Light Rail system linking the precinct with the other major centres of the Gold Coast is being developed in tandem and will provide better access
- Healthscope have contracted to build a private 320 bed hospital that is intended to benefit from co-locating within the intensive health delivery environment.

The concentration of health and knowledge workers is further supported by the health and life science education specialisations in and around the university. In partnership with Griffith University, the Queensland Academy for Health Sciences provides pre-tertiary schooling for year 10-12 students with a focus on clinical professions including medicine, dentistry, physiotherapy, optometry, as well as careers in public health, education and medical research.

Housing and accommodation opportunities in the knowledge precinct are predominantly detached dwellings, but also include student accommodation and modern high density developments such as the Sphere apartments.

The results of the 2011 Census have revealed the following demographic and socio-economic characteristics for Southport (SLA):

- There was a diverse range of housing stock with 33% of occupied dwellings described as separate houses, 23% semi-detached/townhouses and 44% flats/units.
- 55% of households were family households, while group and lone person households comprised 34% and 11% respectively.
- The average household size was 2.1 persons, some 24% lower than that of the State Average (2.6 persons).
- The median total household income was $881, considerably lower than the State average of $1,235.
Green Square Town Centre, Sydney

Green Square Town Centre, located at the heart of Sydney’s CBD to airport corridor, is a major residential, retail and commercial development envisioned to be a unique ‘urban village’ catering for 2,500 new homes. The development is currently in the early stages of construction, with initial residents and businesses anticipated to commence in 2013 and completion of the project expected by 2025 to 2030. The urban village concept is designed around interlinking public domains, from green, open spaces to piazzas and cycle ways and walkways intended to bring people together and promote easy interaction.

The development is envisaged to encapsulate both living and working within easy reach of the CBD and will cater to a diverse range of target markets, offering a diverse range of housing stock.

Target markets include young professionals with high incomes to drive the considerable retail and residential components of the Green Square Town Centre. The demographic mix is also anticipated to include families, older residents, students, key workers and a diverse ethnic mix, including first and second generation migrants from countries within Asia and Europe.

The housing stock will comprise a mix of one, two and three bedroom units in building heights ranging between 4-28 storeys, integrated with the surrounding community to create a sense of social inclusion and add to the new urban dynamic. A range of housing affordability initiatives, particularly for key workers will be taken into consideration.

The results of the 2011 Census have revealed the following demographic and socio-economic characteristics for the Waterloo-Beaconsfield SA2 (from which Green Square is located):

- There was a diverse range of housing stock with 10.2% of occupied dwellings described as separate houses, 11.7% semi-detached/townhouses and 74.4% flats/units.
- 66% of households were family households, while group and lone person households comprised 15% and 17% respectively.
- The average household size was 2.1 persons, almost 30% lower than that of the Greater Sydney Statistical Area (2.7 persons).
The median total household income was $1,368, lower than that of the Greater Sydney Statistical Area ($1,447) but higher than the State average of $1,237.

Green Square Town Centre will provide convenient access to public transport and is conceived as a model of transport oriented development, driven by its connection with the Green Square Railway Station and proximity to other forms of transport. The Royal South Sydney Hospital which closed in 2003 will re-open as part of the Green Square Town Centre development.

**Illawarra International Health Precinct**

The Illawarra International Health Precinct, currently under construction will become NSW’s largest hospital and health precinct comprising an eight-stage development as follows:

1. Specialist and Surgicentre including a major rehabilitation unit
2. Pathology
3. Casualty, Trauma Theatres and Hospital GP unit
4. Obstetric unit
5. 352 bed tertiary referral hospital - Retail shopping plaza - Hospital laundry
6. Nurses, medical students, resident medical officers, registrars accommodation
7. Education facility with outpatient and relatives accommodation
8. Aged and disability centre – Independent Seniors living

Illawarra Health Precinct is envisaged to provide a major Private Tertiary Referral Teaching Hospital and Health Care Precinct which will service the growing regional population and provide a high quality medical resource, facilitating education and research of national and international standards.
The development proposes affiliations with associated universities including medical schools and colleges, 1600 plus training placements and training agreements with the Wollongong College of TAFE. It has been predicted that the development will generate up to 3500 jobs directly, 1500 ancillary jobs and $400 million in annual turnover.

The development proposes a diverse range of accommodation options on site including student accommodation, living quarters for nursing staff, medical students, resident medical officers and registrars, an education facility with accommodation for relatives & patients undergoing extended Therapies and a 280 bed aged care facility (plus 44 independent seniors living villas with 24 hour monitoring). The nurse/medical student accommodation will comprise 1 and 2 bedroom self-contained units while the education facility is anticipated to comprise 80 serviced apartments.

The results of the 2011 Census have revealed the following demographic and socio-economic characteristics for Illawarra (SA4):

- There was a diverse range of housing stock with 74% of occupied dwellings described as separate houses, 11% semi-detached/townhouses, 13% flats/units and 1% other (caravan, cabin etc).
- 87% of households were family households, while group and lone person households comprised 3% and 10% respectively.
- The average household size was 2.6 persons, slightly lower than that of the Greater Sydney Statistical Area (2.7 persons).
- The median total household income was $1,116, considerably lower than both the Greater Sydney Statistical Area ($1,447) and the State average ($1,237).

Illawarra Health Precinct is close to public transport and has design features ensuring easy access to all transport networks including close proximity to the Albion Park Rail/Airport and the proposed Penrose/Huntley railway station.
Penrith Health and Education Precinct

The Penrith Health and Education Precinct’s vision is “to become one of Australia’s premier destinations for health, education, medical research and related industry over the next 10 years.” The precinct is focused around the public and private Nepean Hospitals, the hospital Specialist Clinic, the Kingswood campus of the TAFE NSW – Western Sydney Institute, the University of Western Sydney and the University of Sydney (Sydney Medical School Nepean). The precinct aims to create local jobs, grow the skills base of the region and to attract new investment to Penrith through delivery of projects focused around world leading health, education and training, research and business opportunities related to health, medicine and wellbeing.

Proposed additions to the precinct include commercial medical facilities, medical related accommodation, future health services (private and public) and a multi-deck public carpark. The proposed expansion of education facilities will be facilitated through UWS’s Werrington South and Kingswood campuses which have been nominated to meet the university’s land requirements for the next 20 years.

To meet the identified employment growth in health and wellbeing in the region, TAFE NSW-Western Sydney Institute is seeking to increase its current capacity at Nepean College and create specialised facilities for nursing which is an identified skill shortage area. The facility will also provide the opportunity for delivery in a range of new health training areas including dental, optical dispensing, audiometry and sterilisation.

The precinct currently provides a diverse range of housing stock with high proportions of attached and semi-detached housing, in comparison to the Greater Sydney area. The emerging health and education precinct will encourage further diversity in housing choice with the development of higher density infill residential. The precinct’s existing accommodation facilities include:

- UWS Penrith Student Residential College
- The University of Sydney, student residences
- Tresillian, family short stay accommodation
- Rotary Cottage, carer accommodation
- Anglican Retirement Village

According to the Penrith Health & Education Precinct Strategic Vision 2011 which was undertaken by the PBA (Penrith Business Alliance), future accommodation and housing of the precinct will include:

- Student accommodation
- Professional accommodation
- Medical accommodation
- Hotel accommodation
- Aged living facilities
- Doctors accommodation
- UWS conference and hotel facility
- Mixed use living
Target markets include residents, workers and visitors to the precinct. In particular, the objective is to meet the housing needs of the precinct’s future health and education professionals, the student population and aged living for the older population. The Strategic Vision for the Penrith Health and Education Precinct will be delivered through partnerships between key stakeholders, the community and the NSW Government.

The results of the 2011 Census have revealed the following demographic and socio-economic characteristics for the Penrith SA2 (Statistical Area Level 2):

- There was a diverse range of housing stock with 47% of occupied dwellings described as separate houses, 25% semi-detached/townhouses and 26% flats/units.
- There was a high proportion of lone person households (18%). 78% of households were family households and 4% were group households.
- The average household size was 2.2 persons, some 23% lower than that of the Greater Sydney Statistical Area (2.7 persons).
- The median total household income was $949, considerably lower than both the Greater Sydney Statistical Area ($1,447) and the State average ($1,237).

The results of the 2001, 2006 and 2011 Censuses have been utilised to analyse dwelling structures, tenure/ownership structures and household compositions over a 10 year period for the Penrith SA2 with key results listed below:

- The Penrith SA2 has experienced an increasing level of housing diversity since 2001, with semi-detached houses increasing from 20.7% in 2001 to 24.8% in 2011 and separate houses decreasing from 52.0% in 2001 to 46.5% in 2011;
- In the 10 year period between 2001 and 2011, the proportion of dwellings owned with a mortgage in the Penrith SA2 increased from 17.0% to 23.0%. Conversely, the proportion of dwellings owned outright decreased from 27.0% to 20.4%, while the proportion of rented dwellings remained constant at 47.0%.
- Family household compositions in the Penrith SA2 have become more diverse, with the traditional couple family with children gradually becoming less prominent. There has been an increase in the incidence of lone person households, one parent families and couple families without children between 2001 and 2011.

Proposed transport and infrastructure improvements for the precinct include:

- Potential new train station between Kingswood and Werrington
- Precinct shuttle bus
- New Western Express rail service
- Public car parking tower at Penrith Health Campus
- Improved pedestrian routes and bus stop facilities
- Future cycle ways and walking routes to encourage active living
- Expanded broadband
Randwick Health and Education Centre

The Randwick Health and Education Centre is located in the city of Randwick, 6km south of the Sydney CBD and 6km from Sydney Airport. The precinct is centred on key health and education institutions including the University of NSW and the Randwick Health Campus which comprises the Prince of Wales Hospital, Sydney Children’s Hospital, the Royal Hospital for Women and the Prince of Wales Private Hospital.

The Centre is recognised as a significant knowledge cluster with benefits to the metropolitan region containing the largest complex of teaching hospitals in Australia, an eminent research intensive university, some of Australia’s premier research institutes and the Royal Randwick Racecourse. The Centre comprises a large aggregation of independent and University-sponsored research groups focusing on medical research, physical and bio-sciences, engineering, sustainable development and technology. UNSW alone, operates, supports or participates in over 80 research organisations including Prince of Wales Medical Research Institute (POWMRI), Black Dog Institute, Children’s Cancer Institute of Australia for Medical Research, National Drug and Alcohol Research Centre, Dementia Collaborative Research Institute, UNSW Cancer Research Centre etc.

While the Centre’s target market is diverse, the population comprises high numbers of young adults, many undertaking or having recently completed their tertiary studies, often living in group households and often earning little or no income. The Centre is also home to couples, families and older residents, often professionals, with many on high incomes, and a significant proportion working within the Centre itself or nearby.

The Centre comprises a diverse range of housing stock with a significant student presence in various housing forms, reflecting the demand generated by the UNSW and Hospitals. Many older flat buildings and boarding houses provide a more affordable accommodation type. Historically, there has been a range of accommodation facilities provided at the Randwick Health Campus including a 350 room staff accommodation facility which closed in 2009. Current accommodation includes a Ronald McDonald House which accommodates up to 80 people, catering for young patients receiving treatment and their families.

The results of the 2011 Census have revealed the following demographic and socio-economic characteristics for Randwick (SA2):

- There was a diverse range of housing stock with 17% of occupied dwellings described as separate houses, 15% semi-detached/townhouses and 67% flats/units.
- 75% of households were family households, while group and lone person households comprised 12% and 13% respectively.
- The average household size was 2.3 persons, some 17% lower than that of the Greater Sydney Statistical Area (2.7 persons).
- The median total household income was $1,786, considerably higher than both the Greater Sydney Statistical Area ($1,447) and the State average ($1,237).

Sustainable transport use (public transport, walking and cycling) in the Centre is very high, reflecting the proximity of employment and study close to home. However, public transport services to the Centre are currently provided by buses only. A range of future mass transit options have been identified for the Centre.
including options for station locations and commitment to design and delivery of rail-based public transport services
Westmead Hospital Precinct

The Westmead Hospital Precinct together with the University of Western Sydney, provides the foundations for the Greater Parramatta region to be at the forefront of medical and technical research. The health sector is the predominant employer in the Westmead Precinct, employing approximately 30,000 health care and technical/scientific professionals. Hospitals and medical research facilities include:

- Westmead Hospital (a major teaching hospital)
- Royal Alexandra Hospital for Children
- Cumberland Hospital (a psychiatric hospital)
- Westmead Medical Research Foundation
- Westmead Millennium Institute for Medical Research
- Westmead Centre for Oral Health
- NETS (the moving intensive care service for kids)
- NRMA CareFlight (adult medical retrieval service)
- Telstra Child Flight

There is potential for urban renewal in Westmead along the train line, which would not only adhere to the principles of transit oriented development but provide new residents with easy access to the Westmead health precinct and the retail and commercial hub in the Parramatta CBD. The Westmead Health Precinct provides convenient access to public transport with the Westmead Rail Station situated on the Western Railway Line of the City Rail Network and a bus transit-way service linking Westmead to both Parramatta and The Hills District.

Target markets will include high numbers of young workers, key workers, first home buyers, executives and students who will demand vibrant, interesting suburbs tailoring to the needs of the multi-cultural groups that will concentrate in the area.

The results of the 2011 Census have revealed the following demographic and socio-economic characteristics for the Westmead State Suburb (SSC):

- There was a diverse range of housing stock with 20% of occupied dwellings described as separate houses, 12.5% semi-detached/townhouses and 68% flats/units.
- 85% of households were family households, while group and lone person households comprised 6% and 9% respectively.
- The average household size was 2.6 persons, slightly lower than that of the Greater Sydney Statistical Area (2.7 persons).
- The median total household income was $1,475, slightly higher than that of the Greater Sydney Statistical Area ($1,447) and the State average of $1,237.
APPENDIX C

DEMAND IMPLICATIONS

AECOM in developing the Meadowbrook Key Issues Report, utilised Census Collection District (CCD) boundaries from the 2006 Census which estimates a population of 4,242 within the Key Issues Report Study Area. The Key Issues Report projects an additional 1,983 persons will reside in the defined study area between 2006 and 2031 to 6,225 persons, the majority of which would expect to locate within the Loganlea Neighbourhood Plan area.

It is considered that these projections of the Meadowbrook Key Issues Report do not adequately reflect the intent for Meadowbrook to evolve as a new knowledge precinct that caters for workers and residents or the intended growth of the Loganlea Neighbourhood Plan area to 2031.

The intent of the Loganlea Neighbourhood Plan (October 2011) is to guide growth over the next 20 years and projects an ultimate population of an additional 4,430 persons above 2011 levels. While this ultimate population may be difficult to achieve by 2031, it is Urban Economics’s opinion that the growth in the Neighbourhood Plan area would be larger than that implied in the Key Issues Report population projections for the Meadowbrook Study Area as a whole.

Urban Economics has prepared population and household projects for the remainder of the Meadowbrook Study Area (i.e. excluding the Loganlea Neighbourhood Plan area) under two scenarios, one assuming no strategic direction for Meadowbrook as a Specialist Centre (TABLE C.1) and the other assuming the development of Meadowbrook as a Specialist Centre (TABLE C.2). Not including those CCD’s from the Loganlea Neighbourhood Plan Area and utilising AECOM’s methodology, Urban Economics estimates that the Meadowbrook Study Area’s population was 3,058 persons at the 2006 Census.

In further refining the population estimates and projections, Urban Economics has analysed the 2011 Census which shows a slight contraction in population within Meadowbrook to comprise 3,026 persons, indicative of smaller household sizes and limited new dwelling approvals and residential construction.

The area formerly designated as the Loganlea SLA within the 2006 Census, aligns with the area now classified as the Loganlea SA2 which provides that there were 9,314 persons in the area at the 2011 Census. FIGURE C.1 illustrates the Study Area within the Loganlea SA2 utilising the new geographical classifications from the 2011 Census.
The following TABLE C.1 represents the modest potential growth in the population and dwellings of the Meadowbrook Study Area, excluding the Loganlea Neighbourhood Plan area. Estimates and projections have been based on:

- AECOM’s Meadowbrook Key Issues Report (which utilised the Logan City Employment and Activity Centres Strategy prepared by MacroPlan in 2009);
- ABS Censuses in 2006 and 2011;
- Building approval data to 2012; and
- The Logan City Council Growth Management-Core Matters (based on the draft Local Growth Management Strategy (LGMS)) which identifies Station Road, Meadowbrook/Loganlea as an area of potential infill development with 280 dwellings achievable to 2026 and an escalation of infill development post 2026.
TABLE C.1: Estimated Resident Population, Occupied Dwellings and Household Size 2006-2031-Meadowbrook-Scenario 1

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<tbody>
<tr>
<td>Population</td>
<td>3,058</td>
<td>-0.21%</td>
<td>3,026</td>
<td>4.10%</td>
<td>3,150</td>
<td>0.39%</td>
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<td>0.58%</td>
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<td>Dwellings</td>
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<td>1,049</td>
<td>6</td>
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As at June 2006, there were approximately 3,058 persons residing in 1,013 households in this area, slightly decreasing to 3,026 persons residing in 1048 households by 2011. It is projected that between 2011 and 2031, approximately 474 additional residents and 200 additional households could be accommodated in Study Area. This addition of only 200 households appears to disregard the potential to create a new knowledge precinct which provides a live, work and create environment that will attract new residents to Meadowbrook.

TABLE C.2 projects the potential growth in the population and dwellings of the same area under Scenario 2, cognisant of the projected capacity potentials with an increased diversity and density of residential options in Meadowbrook as identified within the Opportunities Analysis. Estimates and projections have been based on:

- Assuming Meadowbrook evolves as a new knowledge precinct
- ABS Censuses in 2006 and 2011;
- Building approval data to 2012; and
- Assuming an increase in demand in diversity and density of dwelling types.

TABLE C.2: ESTIMATED RESIDENT POPULATION, OCCUPIED DWELLINGS AND HOUSEHOLD SIZE 2006-2031-MEADOWBROOK – SCENARIO 2

<table>
<thead>
<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>3,058</td>
<td>-0.21%</td>
<td>3,026</td>
<td>4.10%</td>
<td>3,150</td>
<td>0.39%</td>
<td>3,200</td>
<td>1.22%</td>
<td>3,400</td>
<td>2.25%</td>
<td>3,800</td>
<td>2.50%</td>
<td>4,300</td>
<td></td>
</tr>
<tr>
<td>Dwellings</td>
<td>1,013</td>
<td>7</td>
<td>1,048</td>
<td>1</td>
<td>1,049</td>
<td>6</td>
<td>1,073</td>
<td>20</td>
<td>1,173</td>
<td>40</td>
<td>1,373</td>
<td>50</td>
<td>1,623</td>
<td></td>
</tr>
<tr>
<td>PPH</td>
<td>3.02</td>
<td>3.00</td>
<td>3.00</td>
<td>2.97</td>
<td>2.86</td>
<td>2.77</td>
<td>2.68</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>


With an increased diversity and density in housing options, it is projected that approximately 1,274 additional residents and 575 additional households could be accommodated in the Study Area between 2011 and 2031.
DEMOGRAPHIC COMPOSITION

Urban Economics has examined a range of demographic characteristics of the Study Area population in preparing projections of the demand for housing within Meadowbrook.

TABLE C.3 below presents historical data as well as projections for changes in the Aged Community in the Meadowbrook Study Area.

Projections of the growth of the population 50+ and the population living in Independent Living Units (ILU’s) have been derived on the basis of:

- Population and household projections derived in TABLE C.2;
- Historical trends in the % of the population aged 50+;
- Review of the Loganlea SLA in comparison to the QLD average age profile;
- Review of PIFU’s age profile projections for QLD;
- Assessment of the share of the 50+ population living in retirement villages (7.5%);
- Assuming an average of 1.4 residents per Independent Living Unit (ILU);
- Assuming a target of 90 aged care places per 1000 population aged 70+; and
- There are currently no designated Aged Care units in the Meadowbrook Study Area.

### TABLE C.3: Projected Growth of the 50+ Population

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ILU’s</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ERP</td>
<td>3,058</td>
<td>3,026</td>
<td>3,200</td>
<td>3,400</td>
<td>3,800</td>
<td>4,300</td>
<td>1,274</td>
</tr>
<tr>
<td>%50+</td>
<td>19.1%</td>
<td>24.6%</td>
<td>27%</td>
<td>30%</td>
<td>32%</td>
<td>34%</td>
<td>-</td>
</tr>
<tr>
<td>ERP 50+</td>
<td>584</td>
<td>744</td>
<td>864</td>
<td>1,020</td>
<td>1,216</td>
<td>1,462</td>
<td>718</td>
</tr>
<tr>
<td>% in ILU’s</td>
<td>9.6%</td>
<td>7.5%</td>
<td>8.0%</td>
<td>8.0%</td>
<td>8.0%</td>
<td>8.0%</td>
<td>-</td>
</tr>
<tr>
<td><strong>Demand for ILU’s</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ERP</td>
<td>40</td>
<td>40</td>
<td>49</td>
<td>58</td>
<td>69</td>
<td>84</td>
<td>44</td>
</tr>
<tr>
<td><strong>Aged Care</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>%70+</td>
<td>3.3%</td>
<td>4.8%</td>
<td>8.2%</td>
<td>10.8%</td>
<td>12.6%</td>
<td>14.0%</td>
<td>-</td>
</tr>
<tr>
<td>ERP 70+</td>
<td>101</td>
<td>145</td>
<td>262</td>
<td>367</td>
<td>479</td>
<td>602</td>
<td>457</td>
</tr>
<tr>
<td><strong>Demand for Aged Care</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ERP</td>
<td>9</td>
<td>13</td>
<td>24</td>
<td>33</td>
<td>43</td>
<td>54</td>
<td>41</td>
</tr>
</tbody>
</table>

Source: ABS Catalogue 3218.0, Urban Economics’s Estimates

From 2011 to 2031 it is projected that:

- Persons aged 50+ will increase by an additional 718 persons representing 34% of total population and resulting in an increase in demand for ILU’s by 44 units.

- Persons aged 70+ will increase by an additional 457 persons, representing 14% of the total resident population and resulting in a demand for some 50 aged care beds.
FIGURE C.2 presents data on the usual place of residence and number of domestic visitors counted in the Meadowbrook Study Area, in comparison to Logan City and Greater Brisbane at the time of the 2011 Census. The Meadowbrook Study Area exhibited a high proportion of domestic visitors (9% c.f. 3% Logan City LGA, 4% Greater Brisbane), reflecting the high number of visitors generated by the Logan Hospital, Griffith University and MSI TAFE.

**FIGURE C.2: Usual Place of Residence**

![Chart showing usual place of residence for Meadowbrook Study Area, Logan LGA, and Greater Brisbane]

**HOUSEHOLD PROJECTIONS**

TABLE C.4 below presents historical data as well as projections for changes in household composition for the Meadowbrook Study Area. Estimates and projections have been based on:

- ABS Censuses in 2006 and 2011
- Building approval data to 2012
- Population projections derived from TABLE C.2
- Average household sizes
- Assuming an increasing representation of young singles and couples seeking affordable living close to work
- Continuing ageing of the population
- Review of PIFU’s household composition projections for Logan LGA

**TABLE C.4: Household Composition Projections**

<table>
<thead>
<tr>
<th>Household Type</th>
<th>2006</th>
<th>2011</th>
<th>2016</th>
<th>2021</th>
<th>2026</th>
<th>2031</th>
<th>2011-2031</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family Households</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>#persons</td>
<td>2,752</td>
<td>2,751</td>
<td>2,864</td>
<td>3,026</td>
<td>3,363</td>
<td>3,784</td>
<td>1,033</td>
</tr>
</tbody>
</table>

80 | Page
<table>
<thead>
<tr>
<th>% of Family Households</th>
<th>90.0%</th>
<th>90.9%</th>
<th>89.5%</th>
<th>89.0%</th>
<th>88.5%</th>
<th>88.0%</th>
<th>-</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lone Person Households #persons</td>
<td>104</td>
<td>121</td>
<td>176</td>
<td>204</td>
<td>266</td>
<td>323</td>
<td>202</td>
</tr>
<tr>
<td>% of Lone Person Households</td>
<td>3.4%</td>
<td>4.0%</td>
<td>5.5%</td>
<td>6.0%</td>
<td>7.0%</td>
<td>7.5%</td>
<td>-</td>
</tr>
<tr>
<td>Group Households #persons</td>
<td>202</td>
<td>154</td>
<td>160</td>
<td>170</td>
<td>171</td>
<td>194</td>
<td>40</td>
</tr>
<tr>
<td>% of Group Households</td>
<td>6.6%</td>
<td>5.1%</td>
<td>5.0%</td>
<td>5.0%</td>
<td>4.5%</td>
<td>4.5%</td>
<td>-</td>
</tr>
<tr>
<td>Total Population #persons</td>
<td>3,058</td>
<td>3,026</td>
<td>3,200</td>
<td>3,400</td>
<td>3,800</td>
<td>4,300</td>
<td>1,274</td>
</tr>
<tr>
<td>Total %</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>-</td>
</tr>
</tbody>
</table>

Source: Urban Economics’s Estimates

The number of persons in Family households is expected to grow by 1,033 persons between 2011 and 2031 representing an approximate 38% increase over the period.

The number of persons in Lone Person households is expected to grow by 202 persons between 2011 and 2031 representing an approximate 167% increase over the period.

The number of persons in Group households has historically declined and is expected to continue in a similar fashion.

TABLE C.5 below presents PIFU’s household composition projections for the Logan LGA (2006 to 2031).

**TABLE C.5: PIFU Household Composition Projections-Logan LGA**

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**DWELLING STRUCTURE PROJECTIONS**

TABLE C.6 presents historical data as well as projections for changes in Dwelling Structure in the Meadowbrook Study Area.

Projections to 2031 have been based on:
- Historical trends in dwelling type
- Building approval activity 2006 – 2011
- Dwelling projections derived from TABLE C.2
- Land available for residential development
- Age and quality of stock
- Focus on infill development activity.
Historical data has indicated that detached houses have typically accounted for the majority (>80%) of total occupied dwellings in the Meadowbrook Study Area.

Between 2006 and 2011 the increase in the number of dwellings in Meadowbrook has been small, with only an additional 35 dwellings reported. It should be noted that more than half of these additional dwellings were townhouses/semi-detached houses.

The proportion of detached houses in Meadowbrook has exhibited a downwards trend, with 85% of occupied dwellings classified as detached in 2006, decreasing to 83.6% by 2011. It is projected that the proportion of detached dwellings will continue to decline to comprise approximately 56% by 2031.

These trends will have an impact upon the future mix of dwelling types in the Meadowbrook Study Area with a shift in the type of dwellings, as detached dwellings represent a lower percentage and ‘other dwellings’ represent an increasingly higher percentage of total occupied dwellings in the future. From 2011 to 2031 it is projected that:

- Detached housing will increase by approximately 30 dwellings and represent 56% of total occupied dwellings, or 50% of the increase in stock
- Semi Detached/Townhouses will increase by 230 dwellings and represent 25% of total occupied dwellings in 2031, or 18% of the increase
- Flats/units are projected to be introduced to the mix of dwelling types, increasing by 310 dwellings to comprise 19% of total dwellings or 24% of the increase.