

200 BRADMAN ST
SUNNYBANK HILLS

ECONOMIC NEED
ASSESSMENT



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1 INTRODUCTION

This section provides an overview of the background, purpose, and scope of the report.

1.1 Background and Context

200 Bradman Street, Sunnybank Hills is occupied by Robertson Gymnastics Centre, which operates gymnastics programs from KinderGym for ages 2 to 5 through to advanced gymnastics, so the site is functioning as an established indoor sport and recreation facility rather than a conventional industrial premises.

The planning issue is that the site's current use sits within a low impact industry context, while Brisbane City Plan's low impact industry zone is intended to provide for low impact industry, service industry and warehouse uses. That makes the continued use of the site for gymnastics, and its relationship to the surrounding land use framework, a material matter for assessment.

1.2 Report Purpose

Econisis has been engaged to prepare an Economic Needs Assessment for 200 Bradman Street, Sunnybank Hills. The purpose of the report is to test the evidence for formalising the existing use, while also addressing the extent to which the site remains needed for industrial purposes now and into the future.

This report is comprised of the following key sections:

1. **Introduction** – This section provides an overview of the background, purpose, and scope of the report.
2. **Socioeconomic Profile** – This section conducts socioeconomic profiling of the relevant catchments.
3. **Indoor Sports and Recreation Needs Assessment** – This section analyses the need for the facility and the extent to which it services the defined catchment within the context of other clubs.
4. **Local Industrial Market Assessment** – This section will assess the local industrial market by analysing broad trends, as well as local industrial land availability, business registrations, and building approvals.
5. **Community Benefit Assessment** – This section evaluates the economic highest and best use of the site using a net community benefit assessment approach.
6. **Conclusion** – This section provides a summary of key findings and recommendations from the report.

1.3 About the Subject Site and Roberston Gymnastics

The 200 Bradman Street, Sunnybank Hills facility is a substantial gymnastics hub for Roberston Gymnastics. Since 2018, the centre has catered for a range of gymnasts from true beginners through to international level athletes and is part of one of the largest and most comprehensive gymnastics providers in Australia. Robertson Gymnastics itself has been operational as an entity for 36 years.

The centre's program mix is broad, with significant enrolments in general gymnastics and trampoline, alongside women's artistic, tumbling, kindergym, prep, acro, men's artistic, dance, adults' classes, and private lessons. Members are typically involved in more than one class type, which is consistent with a facility that supports participation and pathway development.

A review of membership data provided by Roberston Gymnastics finds that the club currently has 956 members, with the average per member attendance at 1.25 times per week with peak attendance on weekends and on Monday and Wednesday afternoons from 3:30-6:00. The centre has activities 7 days a week (including formal classes 6 days a week). The majority of members are under the age of 14, though there is a sizeable minority aged 14 and over, including adult members.

Members are drawn from across South East Queensland, though approximately 80% of members are located in southern and south west Brisbane. Major suburbs of residence of members (with more than 10 members resident) at the time of this report include:

- Sunnybank Hills
- Algester
- Parkinson

- | | | |
|---------------------|-------------------|---------------|
| ▪ Calamvale | ▪ Salisbury | ▪ Wishart |
| ▪ Eight Mile Plains | ▪ Stretton | ▪ Sunnybank |
| ▪ Runcorn | ▪ Parkinson | ▪ Rochedale |
| ▪ Tarragindi | ▪ Rochedale South | ▪ Regents Par |
| ▪ Kuraby | ▪ Macgregor | |
| ▪ Pallara | ▪ Coopers Plains | |

Robertson Gymnastics supports a broad local membership base through regular classes and recreational participation activities. The facility accommodates a wide range of age groups and skill levels, supporting ongoing community access to indoor sport and recreation within the surrounding catchment. While the primary function of the facility is to support local community participation, the centre also plays a supporting role within the wider South-East Queensland gymnastics network through the occasional hosting of organised activities and inter-club events. This role is secondary to the day-to-day community recreation function of the facility and does not alter the fundamentally local character of the use. Overall, the facility provides an established indoor recreation service that supports participation, physical activity and community wellbeing for nearby residents and workers.

1.4 Statistical Geography

Drawing on the membership data provided by Robertson Gymnastics, the catchment assessed for the Indoor Sports and Recreation Needs Assessment is defined as the surrounding three SA3 regions from the ABS:

- Nathan SA3 – which extends north to include Coopers Plains, Salisbury, Robertson, Nathan, and Moorooka
- Sunnybank SA3 – which includes the suburbs of Sunnybank, Sunnybank Hills, Runcorn, and Kuraby
- Rocklea - Acacia Ridge SA3 - which extends to the Logan Motorway and includes the suburbs of Calamvale, Pallara, and Parkinson as well as industrial centres at Acacia Ridge and Rocklea

This is considered reasonable given the centre's membership base, which draws participants from across all these areas.

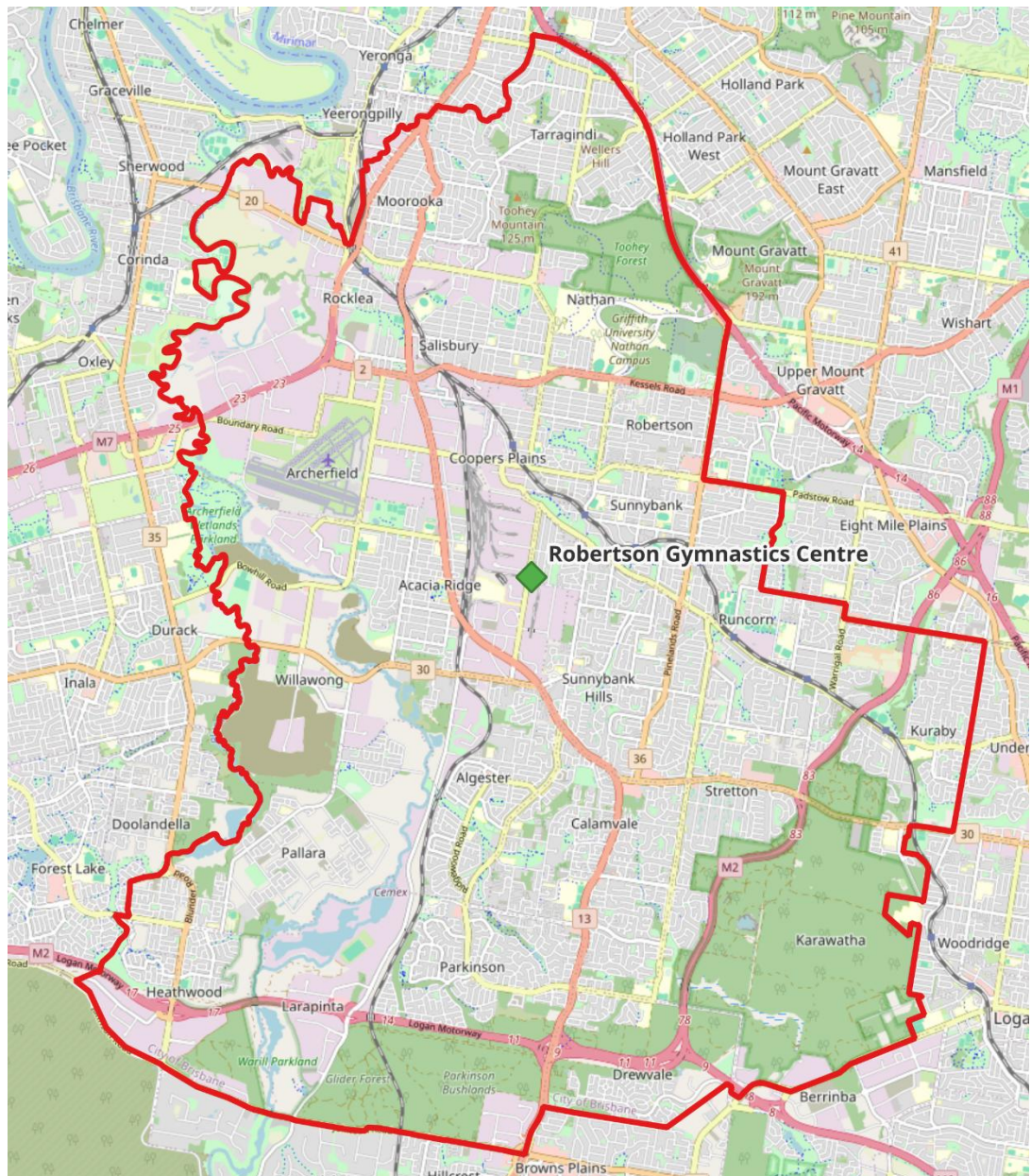


Figure 1 Catchment for Indoor Sports and Recreation Needs Assessment

The catchment for the Local Industrial Market Assessment has been defined as the SA2 of Sunnybank Hills (contained within the SA3 of Sunnybank), as it provides a practical geographic boundary for the assessment of local industrial land supply and demand conditions. However, consideration is also given to the adjacent Rocklea-Acacia Ridge SA3 as the largest concentration of zoned industrial land in the market.

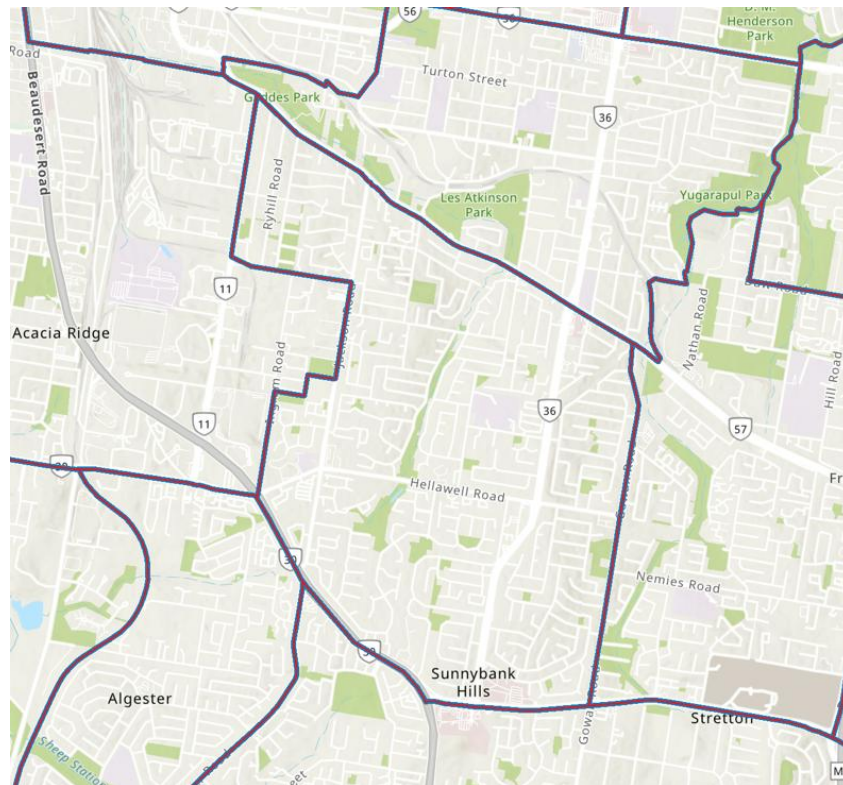


Figure 2 Catchment for Local Industrial Market Assessment

1.5 Glossary and Abbreviations

The following table outlines key terms and abbreviations used throughout this report.

Table 1 Glossary and Abbreviations

Term/Abbreviation	Definition
ABS	Australian Bureau of Statistics
CAGR	Compound Annual Growth Rate
GFA	Gross Floor Area
SA2	Statistical Area Level 2
SA3	Statistical Area Level 3
\$m	Millions of Dollars

2 SOCIOECONOMIC PROFILE

This section conducts a socioeconomic profile for each catchment: one informing the broader indoor sport and recreation needs assessment, and one informing the local industrial market assessment.

2.1 Indoor Sports and Recreation Needs Assessment Catchment

This section conducts socioeconomic profiling of the indoor sports and recreation needs assessment catchment, comprising the SA3s of Nathan, Rocklea – Acacia Ridge, and Sunnybank.

2.1.1 Population

The population of the catchment area has grown from 110,482 in 2001 to 179,141 in 2025. This is representative of a CAGR of 2.0%. From 2025 the population is projected to continue to grow, although at a slower rate, reaching 196,154 in 2046 with a CAGR of 0.4%.

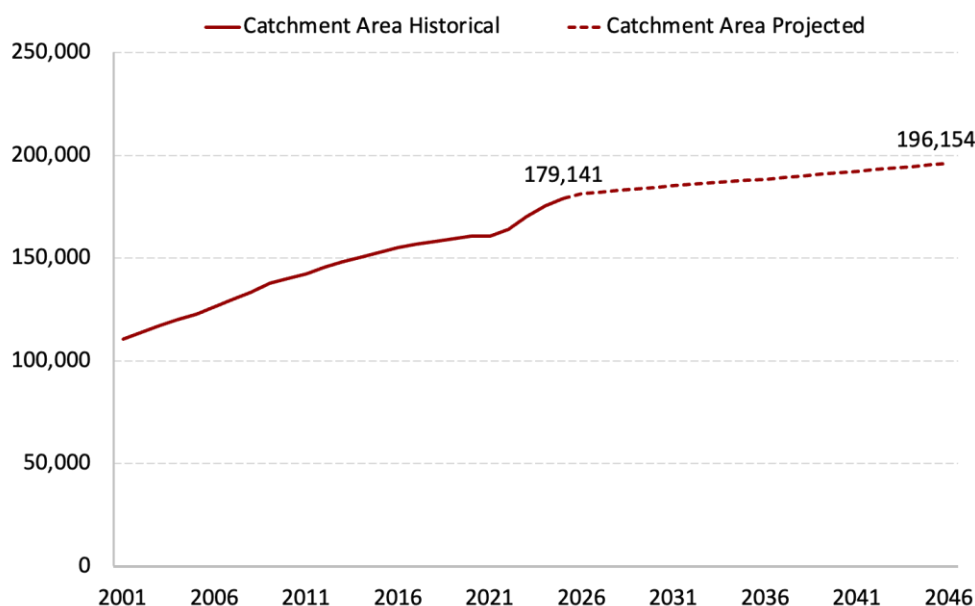


Figure 3 Historical¹ and Projected² Population, Catchment, 2001 – 2046

In regard to the three SA3s comprising the catchment, Rocklea – Acacia Ridge has a higher population than the other SA3s, expected to grow from 80,680 in 2026 to 88,782 in 2046, this is representative of a CAGR of 0.5%. Nathan is expected to have an identical growth rate, growing from 44,735 in 2026 to 49,416 in 2046. Sunnybank, in contrast, is only expected to have a CAGR of 0.2%, growing from 55,939 to 57,965 over the same period.

¹ ABS (2026) Regional Population, accessed at abs.gov.au

² QGSO (2024) Population Projections: Regions, accessed at qgso.qld.gov.au

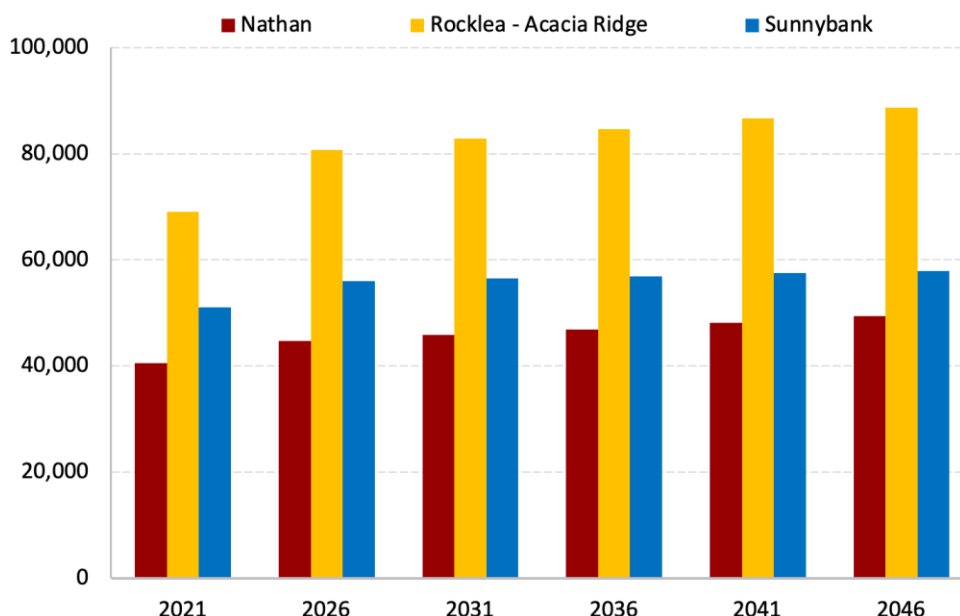


Figure 4 Historical³ and Projected⁴ Population, Catchment by SA3, 2021 – 2046

2.1.2 Census

Key findings from the 2021 census comparing the defined catchment SA3s to the wider Queensland include:

- Across the catchment area, all three SA3s are younger than Queensland, with median ages of 36 in Nathan and 35 in both Rocklea - Acacia Ridge and Sunnybank, compared with 38 for Queensland. Average household size is also larger in the catchment, at 2.6 in Nathan and 3.0 in both Rocklea - Acacia Ridge and Sunnybank, versus 2.5 statewide.
- The age structure is different across the three SA3s. Rocklea - Acacia Ridge has the highest share of children aged 0 to 14 at 22.3%, well above Queensland's 18.7%, while Sunnybank has the highest share of people aged 65+ at 14.8%, although that is still below Queensland's 17.0%. Nathan sits closer to the state profile on these measures, at 18.4% for ages 0 to 14 and 12.9% for ages 65+.
- The catchment is more culturally diverse than Queensland, based on the share born in Australia. Nathan records 66.3%, while Rocklea - Acacia Ridge and Sunnybank are far lower at 48.5% and 42.9%, compared with 71.4% for Queensland.
- Educational participation is substantial across the catchment. Nathan has the strongest university profile, with 26.0% of tertiary attendees in university or other higher education, compared with 15.0% in Rocklea - Acacia Ridge, 19.9% in Sunnybank, and 14.2% for Queensland.
- Income outcomes are strongest in Nathan. Its personal, family, and household weekly incomes are all above Queensland at \$904, \$2,477, and \$2,062 respectively, while Rocklea - Acacia Ridge is slightly above Queensland on personal income and family income but well above it on household income, and Sunnybank is below Queensland on personal and family income but above it on household income.
- Household composition and housing also differ clearly from the state benchmark. Rocklea - Acacia Ridge and Sunnybank both have higher shares of couple families with children than Queensland, at 42.8% and 37.6% versus 29.5%, while lone person households are much less common in those two SA3s than in Queensland. Dwelling occupancy is higher across the catchment, separate houses are more dominant than in Queensland, semi-detached housing is more common in Rocklea - Acacia Ridge and Sunnybank, and apartments are far less common there than statewide.

³ ABS (2026) Regional Population, accessed at abs.gov.au

⁴ QGSO (2024) Population Projections: Regions, accessed at qgso.qld.gov.au

Table 2 Census Table, Catchment SA3s, 2021⁵

Indicators	Nathan	Rocklea - Acacia Ridge	Sunnybank	QLD
Headline				
Population	39,907	67,890	50,190	5,156,138
Median Age	36	35	35	38
Average Household Size	2.6	3	3	2.5
Share of Population 0-14 (%)	18.4%	22.3%	18.5%	18.7%
Share of Population 65+ (%)	12.9%	11.5%	14.8%	17.0%
Born in Australia	66.3%	48.5%	42.9%	71.4%
Share of People Attending Educational Institutions				
Pre-School	792	1,514	863	84,535
Primary	3,357	6,783	4,225	426,110
Primary – Government	17.9%	23.3%	19.7%	18.6%
Primary – Catholic	6.2%	4.2%	2.6%	5.1%
Primary - other non-Government	2.2%	3.6%	3.5%	3.4%
Secondary	2,465	4,883	3,206	352,608
Secondary - Government	9.4%	15.0%	12.5%	13.3%
Secondary - Catholic	6.4%	4.0%	3.3%	4.6%
Secondary - other non-Government	3.5%	3.3%	3.9%	4.4%
Tertiary	4,250	4,972	5,062	334,418
Tertiary - Vocational education (including TAFE and private training providers)	7.3%	7.8%	11.1%	7.0%
Tertiary - University of other higher education	26.0%	15.0%	19.9%	14.2%
Weekly Incomes				
Personal	\$904	\$797	\$690	\$787
Family	\$2,477	\$2,048	\$1,831	\$2,024
Household	\$2,062	\$1,941	\$1,763	\$1,675
Share of Household				
Couple family without children	25.1%	24.7%	26.1%	28.9%
Couple family with children	32.5%	42.8%	37.6%	29.5%
One parent family	10.0%	12.9%	11.9%	12.1%
Other family	1.9%	1.2%	1.6%	1.2%
Lone Person Households	23.7%	15.0%	16.8%	24.2%
Group Households	5.7%	3.3%	5.9%	4.2%
Dwelling Occupancy				
Occupied	93.8%	95.2%	94.3%	90.7%
Unoccupied	6.2%	4.8%	5.7%	9.3%
Dwelling Type				
Separate house	77.6%	81.8%	80.3%	74.8%
Semi-detached, row or terrace house, townhouse etc	10.9%	16.8%	18.6%	11.7%
Flat or apartment	11.2%	1.0%	0.5%	12.5%
Other dwelling	0.0%	0.2%	0.5%	0.7%
Tenure				
Owned outright	27.3%	23.6%	32.6%	29.1%
Owned with a mortgage	36.4%	43.7%	31.0%	34.4%
Rented	33.9%	30.2%	33.0%	33.1%
Other tenure type	1.5%	1.1%	1.9%	1.9%
Tenure type not stated	1.0%	1.3%	1.6%	1.6%

2.1.3 Business Registrations

The total number of businesses registered in the catchment grew from 16,455 in 2020 to 19,478 in 2025. This is equivalent to a CAGR of 3.4%.

⁵ ABS (2022) Quickstats, accessed at abs.gov.au

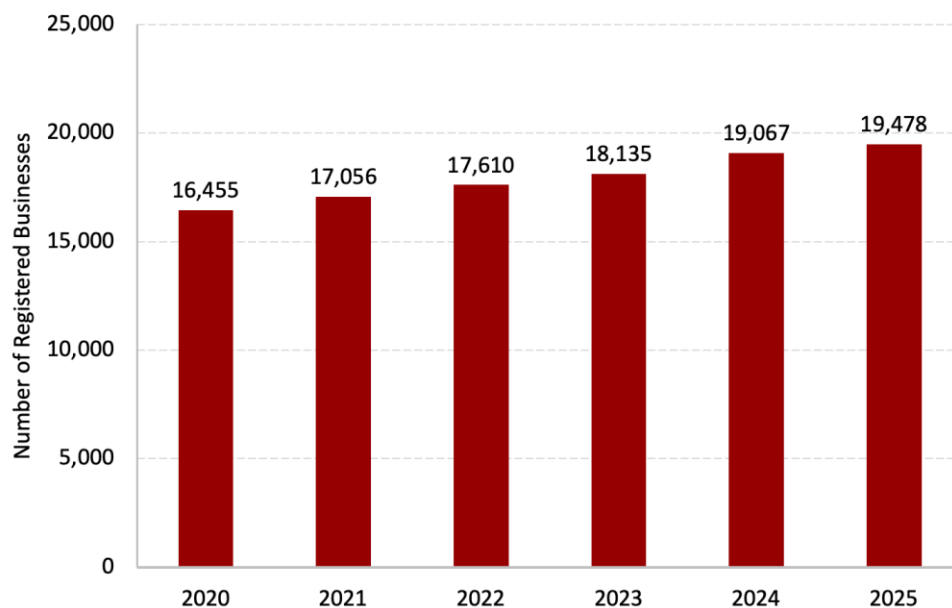


Figure 5 Total Business Registrations, Catchment, 2020 – 2025⁶

Breaking these business registrations down by SA3 shows that the main historical growth in businesses is due to the Rocklea – Acacia Ridge SA3 with a CAGR of 4.9%. Nathan and Sunnybank have still had positive historical growth, with a CAGR of 2.6% and 2.0%, respectively.

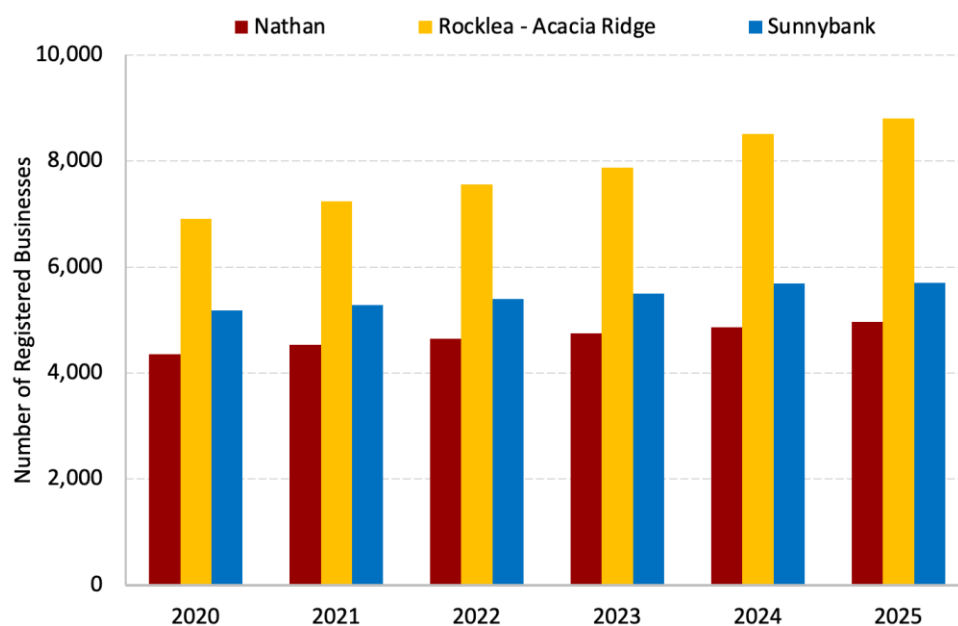


Figure 6 Business Registrations by SA3, Catchment, 2020 – 2025⁷

Analysing the industries that the business registrations of the Catchment are comprised of reveals that Transport, postal and warehousing is the most prevalent industry, with 3,432 registered businesses. This is followed by Construction with 2,525 registrations, and Rental, hiring and real estate services with 2,433 registrations.

⁶ ABS (2026) Business Entries and Exits, accessed at abs.gov.au

⁷ ABS (2026) Business Entries and Exits, accessed at abs.gov.au

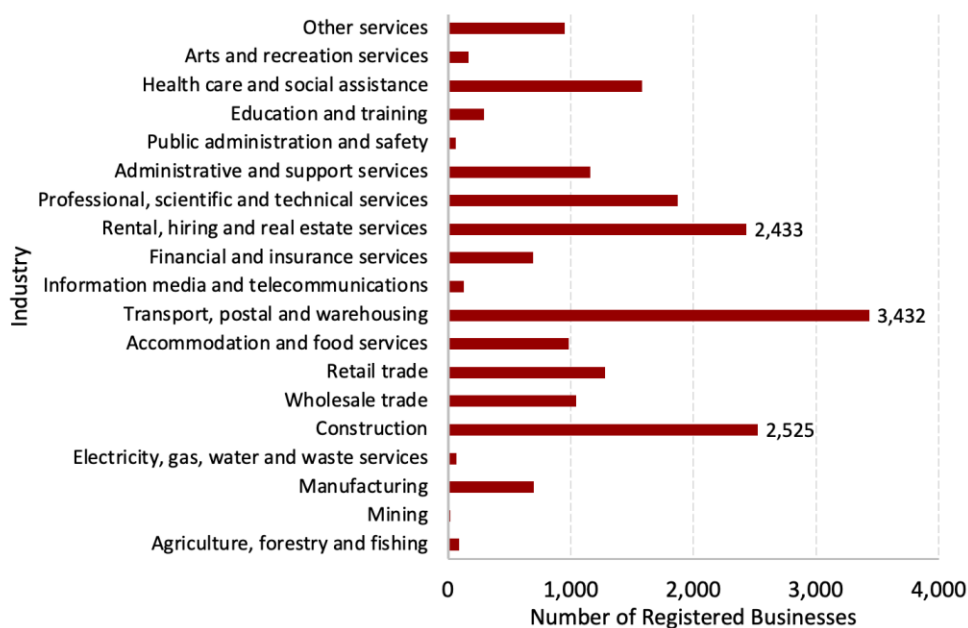


Figure 7 Business Registrations by Industry, Catchment, 2025⁸

2.1.4 Building Approvals

The value of non-residential building approvals within the Catchment has exhibited a strong upward trend, increasing from approximately \$173m in 2018-19 to \$458m in 2024-25. This indicates a sustained level of investment in commercial, institutional, and other non-residential development activity across the region over the review period. A notable exception to the broader trend occurred in 2022-23, when the value of approvals peaked at approximately \$849m, exceeding all other years analysed. This spike is reflective of several major projects being approved within a single year.

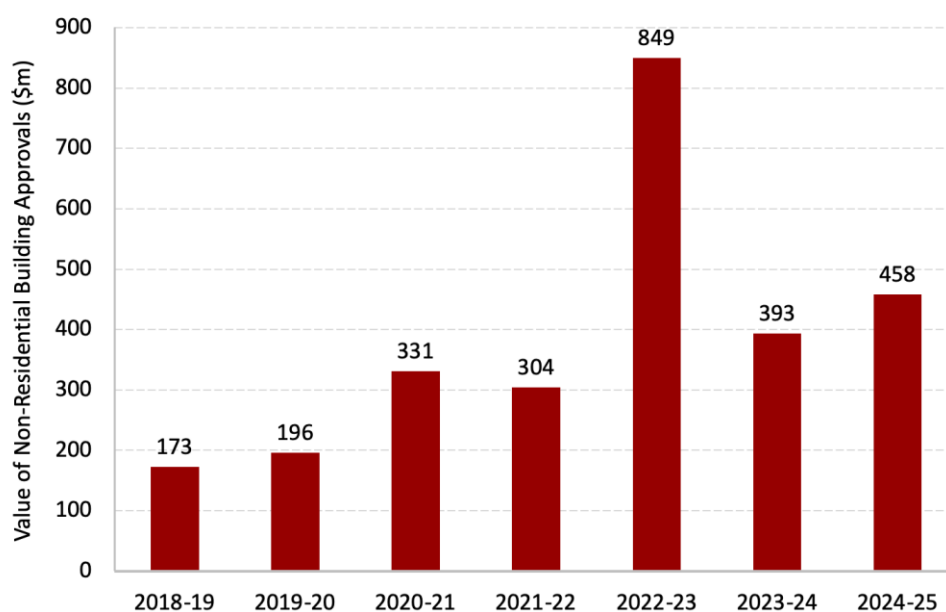


Figure 8 Value of Non-Residential Building Approvals, Catchment, 2018 – 2025⁹

⁸ ABS (2026) Business Entries and Exits, accessed at abs.gov.au

⁹ ABS (2026) Building Approvals, accessed at abs.gov.au

2.2 Local Industrial Market Assessment Catchment

This section conducts socioeconomic profiling informing the Local Industrial Market Assessment catchment, comprising the SA2 of Sunnybank Hills.

2.2.1 Population

The population of Sunnybank Hills SA2 has grown from 15,935 in 2001 to 19,742 in 2025. This is representative of a CAGR of 0.9%. This growth is expected to slow but continue, reaching 20,577 in 2046 with a CAGR of 0.2%.

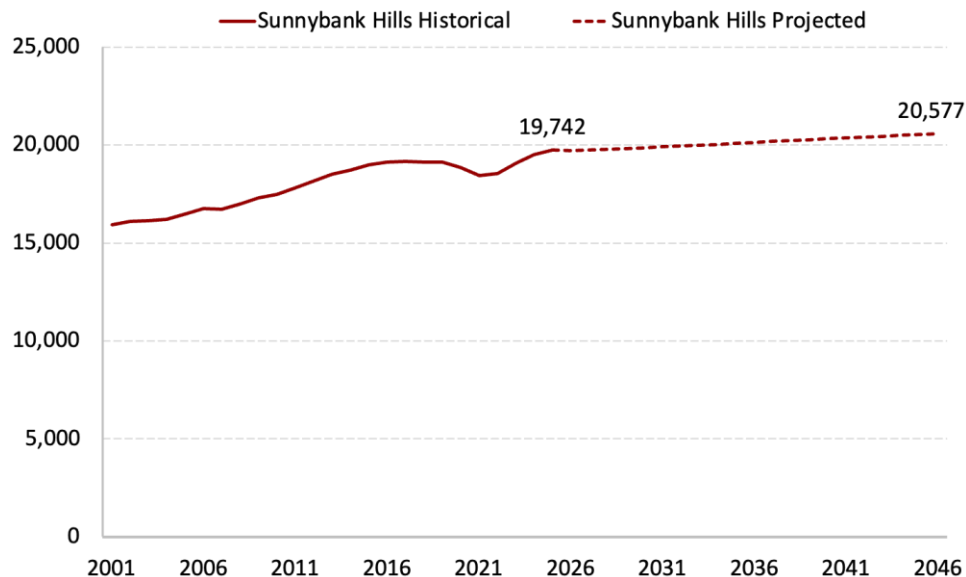


Figure 9 Historical¹⁰ and Projected¹¹ Population, Sunnybank Hills SA2, 2001 – 2046

2.2.2 Business Registrations

The registered businesses in the Sunnybank Hills SA2 catchment have grown from 1,877 in 2020 to 2,037 in 2025. This is equivalent to a CAGR of 1.6%.

¹⁰ ABS (2026) Regional Population, accessed at abs.gov.au

¹¹ QGSO (2024) Population Projections: Regions, accessed at qgso.qld.gov.au

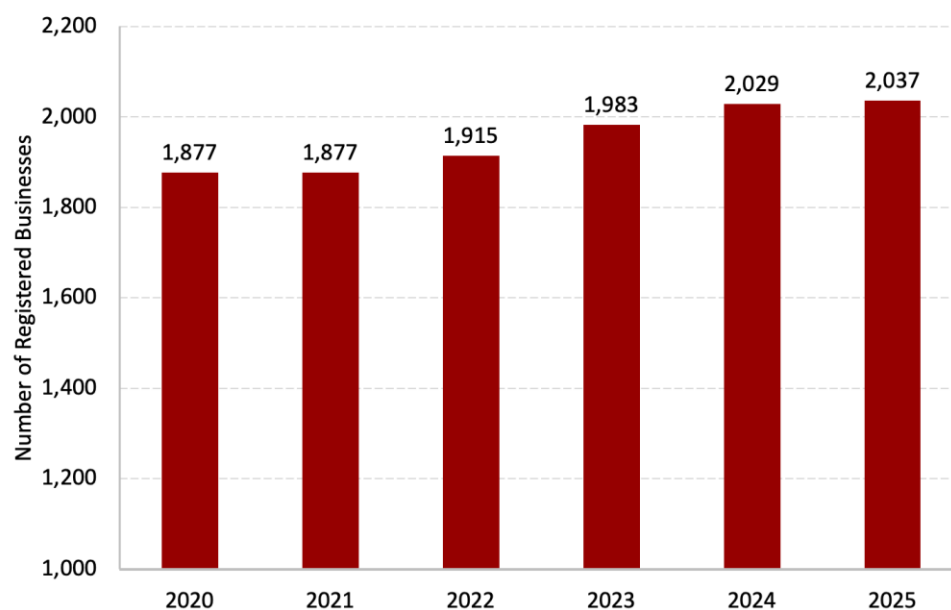


Figure 10 Total Business Registrations, Sunnybank Hills SA2, 2020 – 2025¹²

In regard to the composition of the business registrations, in 2025 the industry with the most registrations was Transport, postal and warehousing at 335 registrations. This is followed by Rental, hiring and real estate services at 324 registrations, and Construction at 258 registrations.

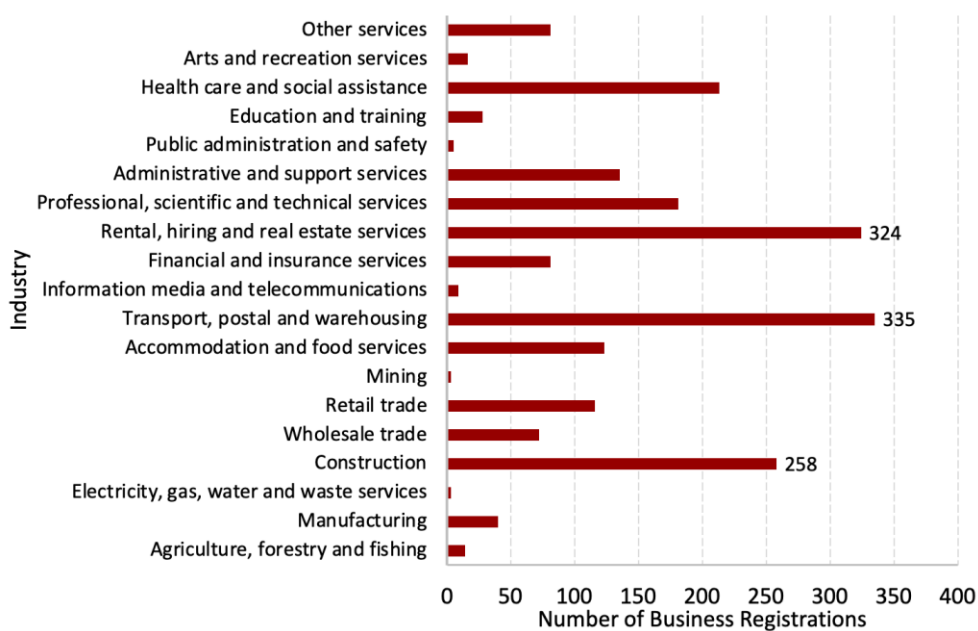


Figure 11 Business Registrations by Industry, Sunnybank Hills SA2, 2025¹³

2.2.3 Building Approvals

The value of non-residential building in Sunnybank Hills SA2 was volatile across the period, ranging from \$1.5m to \$23.3m. It was modest in 2018-19 (\$2.7m), fell further in 2019-20 (\$1.5m), then rose sharply in 2020-21

¹² ABS (2026) Business Entries and Exits, accessed at abs.gov.au

¹³ ABS (2026) Business Entries and Exits, accessed at abs.gov.au

(\$6.4m) and peaked in 2021-22 at \$23.3m. After easing to \$2.8m in 2022-23 and reaching \$5.9m in 2023-24, it climbed further to \$22.7m in 2024-25.

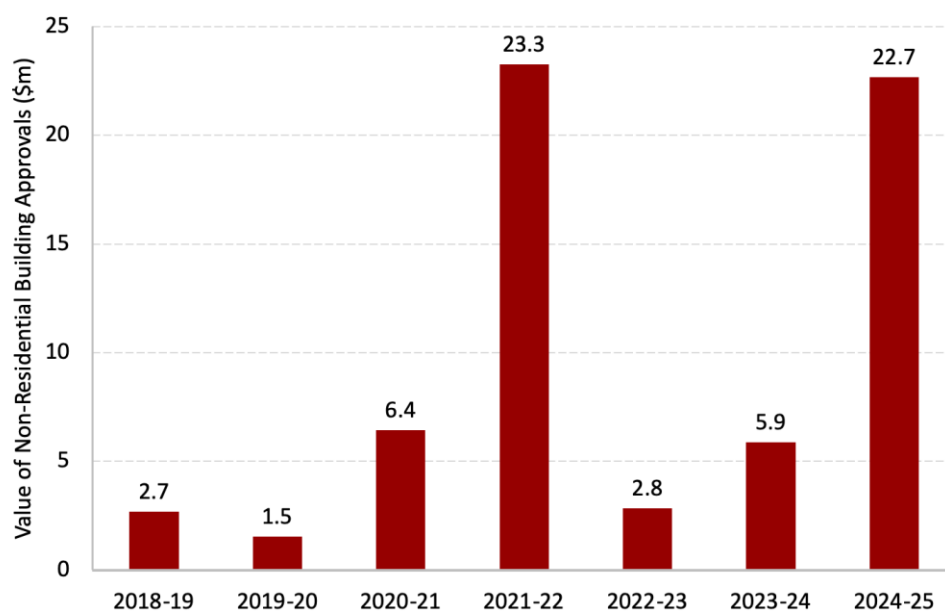


Figure 12 Value of Non-Residential Building Approvals, Sunnybank Hills SA2, 2018 – 2025¹⁴

¹⁴ ABS (2026) Building Approvals, accessed at abs.gov.au

3 INDOOR SPORTS AND RECREATION NEEDS ASSESSMENT

This section analyses the need for the gymnastics facility and the extent to which it services the defined catchment within the context of other clubs and facilities.

3.1 General Sports Participation

The Australian Sports Commission's AusPlay survey is the main national source for participation measurement in Australia. It is a large-scale population tracking survey used to inform government investment and policy, and the ASC released its latest AusPlay outputs on 30 April 2026, including 2025 national data tables¹⁵.

Participation is extensive. In 2023 to 24, 85% of Australians aged 15 and over participated in some form of sport or physical activity at least once, and just over 47% participated at least three times a week¹⁶. This indicates that sport participation is a mainstream behaviour with consequences for health, labour, and household spending.

Participation patterns vary across life stages. For children aged 0 to 14, an estimated 36% took part in organised outside-of-school-hours sport related activity at least once a week in 2024, with boys and girls recorded at the same rate. For Australians aged 15 to 24, the weekly participation rate was 42%, but the gender gap was marked, at 48% for males and 36% for females. The activity mix is also distinctive. Across the population, walking, fitness and gym work, and bushwalking are the most common annual activities, while soccer, basketball, and Australian rules football are the leading team sports¹⁷.

Regular physical activity reduces economic disease burden and health expenditure, while inadequate activity adds to avoidable costs. AIHW estimates that in 2018 to 19, \$2.4 billion was spent on diseases caused by insufficient physical activity, and \$1.7 billion in disease spending was prevented by physical activity¹⁸. The public health case is aligned with the fiscal: physical inactivity is a major risk factor for chronic disease and premature death, while sport participation generates benefits and reduces injury-related costs that matter to the broader economy.

3.2 Gymnastics Sector Profile

Gymnastics in Australia is organised as a federated, club-based system. Gymnastics Australia sits at the national level, while state and territory member associations and local clubs carry much of the practical delivery, competition administration, coaching, and member support. The sector's current national strategy, INSPIRE 2032, frames that structure explicitly around collaboration, excellence, respect, and a member-based model, with a stated aim of creating "an inspiring gymnastics experience for every Australian."

Gymnastics Australia's 2024 annual report recorded 526 affiliated clubs, 5,308 coaches, 2,948 judges, 211,482 registered athletes, and more than 800,000 Australians participating in gymnastics overall¹⁹. The sport is organised through a national and state-based club structure, with discipline pathways across Acrobatic, Aerobic, Rhythmic, Trampoline, Men's Artistic, Women's Artistic and Gymnastics for All. This shows a sport built around both mass participation and formal progression into higher-level pathways. Ausplay data lists 261,000 girls aged 0-14 as participants in gymnastics²⁰, while the Gymnastics Australia's annual report reinforces that demographic profile, with 79% of registered athletes female and 72% under the age of 13.

¹⁵ Ausport (2026) Ausplay, accessed at <https://www.ausport.gov.au/clearinghouse/research/ausplay>

¹⁶ AIHW (2025) Sports Injury in Australia, accessed at <https://www.aihw.gov.au/getmedia/9a4f64f5-4cf4-4afc-9514-4d1fac9a01ea/sports-injury-in-australia.pdf?v=20240717010735%26inline%3Dtrue>

¹⁷ Ausport (2025) Children and Youth in Sport, accessed at <https://www.ausport.gov.au/clearinghouse/evidence/children-and-youth-in-sport>

¹⁸ AIHW (2023) Economics of sport and physical activity participation and injury, accessed at <https://www.aihw.gov.au/getmedia/6eb3c7a1-c8f7-4940-b5cd-a85e888a0d1d/economics-of-sport-and-physical-activity-participation-and-injury.pdf?inline=true&v=20260219095711>

¹⁹ Gymnastics Australia (2024) Annual Report, accessed at <https://ascwrstorageprod001.ausport.gov.au/assets/QjWKw19ytBzrgyvhHkD7DQ.pdf?se=2026-05-08T11%3A03%3A01Z&sig=AHx%2Fz0EppP5%2Bd%2Bg%2FW%2FLMIYxYSGXfgFvg4SUOzO9cXoc%3D&sp=r&sr=b&st=2026-05-08T03%3A03%3A01Z&sv=2025-11-05>

²⁰ As above

Gymnastics also sits within a fee-based club environment. Across organised sport more broadly, AusPlay found that 74% of participating children paid to play outside school hours at least once in the previous 12 months, with an average annual spend of \$1,065, while 52% of participating adults paid to participate and spent an average of \$1,478 a year²¹. In 2024, Gymnastics Australia reported \$7.0m in membership and fees revenue, \$3.8m in grant revenue, and \$3.0m in participation and events revenue, alongside a profit of \$290,557 for the year. That mix is representative of a sector that depends on both household-funded club activity and institutional support.

3.3 Existing Gymnastics Supply

Robertson Gymnastics not the only gymnastics club/facility within the defined catchment. The area has several other competitive clubs located across a combination of education and community facilities. Other centre of notes include:

- YMCA Gymnastics Acacia Ridge (1391 Beaudesert Rd Acacia Ridge QLD 4110) -approximately 650 members - mens and womens artistic only
- Aspire Gymnastics Academy - Gymnastics Club (Estoril St, Robertson QLD 4109) – approximately 200 members - rhythmic gymnastic only
- MyFirstGym Salisbury (Unit 11/655 Toohey Rd, Salisbury QLD 4107) – kindy-gym only

It is important to recognise that most of these gymnastics' centres are not comparable with that of Robertson Gymnastics, which is the only comprehensive, multi-disciplinary and multi-use competitive gymnastics club and centre within the catchment. Other locations within the catchment provide more targeted gymnastics classes (focused on specific gymnastics disciplines) or represent toddler and child based recreation based pseudo-gymnastics offerings (such as kindy-gym).

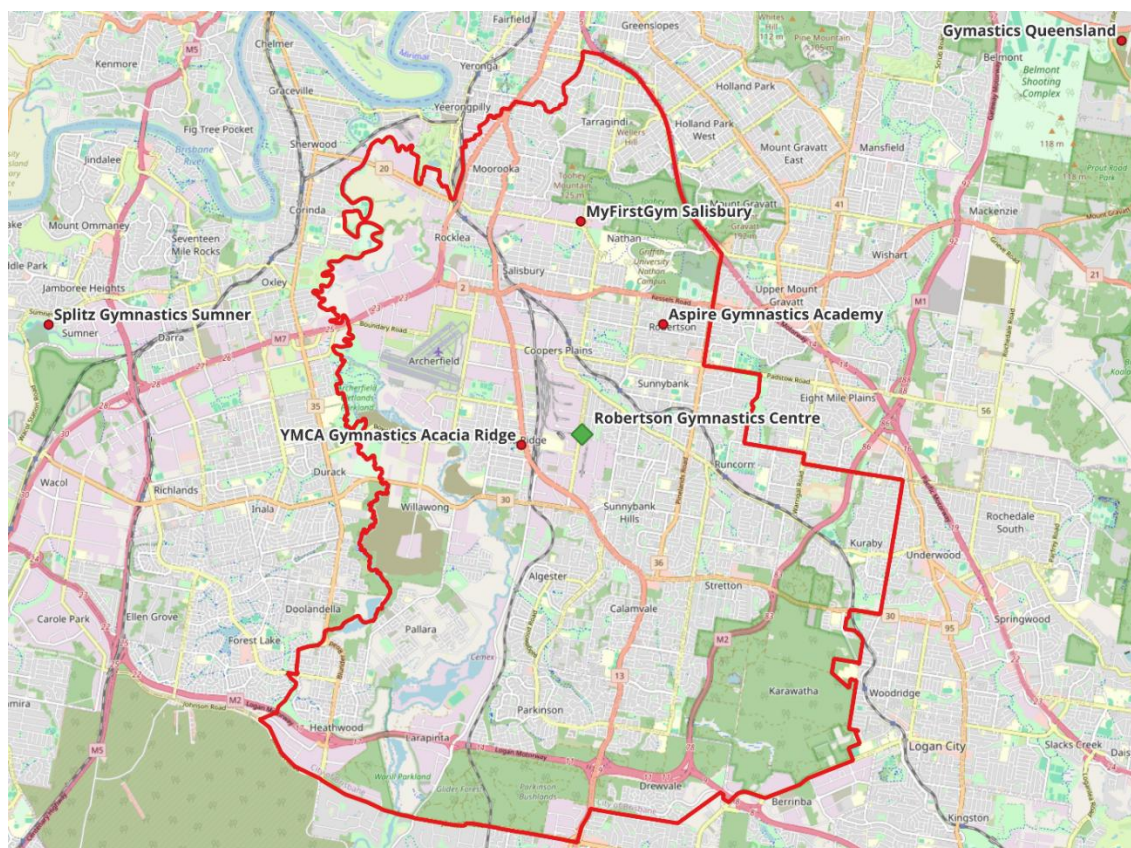


Figure 13 Gymnastics Facility Supply, Robertson Gymnastics Centre Catchment

²¹ Ausport (2024) Cost, accessed at <https://www.ausport.gov.au/clearinghouse/evidence/factors-influencing-sport-participation/cost>

The inclusion of these catchment offerings, though not comparable in scope and breadth of offering ensures the assessment is conservative and defensible.

There are also clubs/facilities located outside of the catchment in area such as:

- Splitz Gymnastics (79 Jijaws St, Sumner QLD 4074)
- Gymnastics Queensland (Sleeman Sports Complex, Cnr Old Cleveland & Tilley Roads, Chandler) – this serves as the high-performance training centre for Gymnastics Queensland representative teams and scholarship recipients.

Gymnastics Queensland is the primary Queensland association for gymnastics clubs of which Robertson Gymnastics is a member.

3.4 Methodology of Gymnastics Participation Modelling

The demand projection for gymnastics participation at the centre was developed by first defining a catchment area around the site. The catchment comprised the three surrounding SA3s, justified through current membership locations and spread. Historical ABS regional population projections by age and sex were collated, and the QGSO age- and sex-specific projections were then rebased to the 2024 ABS regional population estimates to generate projected SA3 populations by age and sex through to 2046.

These population projections were then aggregated into age bands aligned to the Australian Sports Commission's AusPlay participation data. AusPlay national participation rates by age and sex, sourced via the Clearinghouse for Sport, were applied to the projected population in the primary catchment to estimate the number of gymnastics participants over time.

Retention rates for each catchment, including the primary and beyond-catchment share, were then applied to derive the forecast number of retained gymnastics participants associated with the centre catchment.

Note the participation modelling perspective, this excludes Fit-For-Life programs, which utilise the facility during non-peak usage. There are currently 20 members for this program which is expected to grow to 100 users. These users are in addition to gymnastics participation modelling below.

3.4.1 Assumptions

Econisis has made the following assumptions applicable across the indoor sports and recreation needs assessment.

Table 3 Key Assumptions

Assumption	Details
Catchment Definition	Informed by the spread and location of current members.
Catchment Retained Participation Share: 25%	This rate has been adopted to reflect the centre's established presence while recognising that a sizeable proportion of gymnastics demand generated within the catchment is currently being captured by other facilities including those outside of the catchment elsewhere.
Beyond Catchment Retained Participation Share: 20%	This rate has been adopted based on current memberships, which indicate that approximately one-fifth of existing members reside outside the defined catchment area.
Projected Population	QGSO population projection growth rates ²² rebased to ABS regional population ²³ .
Ausplay Participation Rates	National Participation Rates for gymnastics ²⁴ , applied to gender and adjusted age groups for projected population.

²² ABS (2026) Regional Population, accessed at abs.gov.au

²³ QGSO (2024) Population Projections: Regions, accessed at qgso.qld.gov.au

²⁴ Ausport (2026) Clearinghouse for Sport, accessed at <https://www.ausport.gov.au/clearinghouse/research/ausplay/results>

3.5 Catchment Results

3.5.1 Catchment Supply and Demand

The projected total gymnastic participants within the catchment hovers around 3,200 from 2026 to 2046. The projected participants in 2026 are 3,177, this is expected to dip slightly in 2036 to 3,133 and then increase to 3,247 in 2046. This is due to the projected rebased population age groups and gender within the catchment varying over time, not a deviation in participation rates.

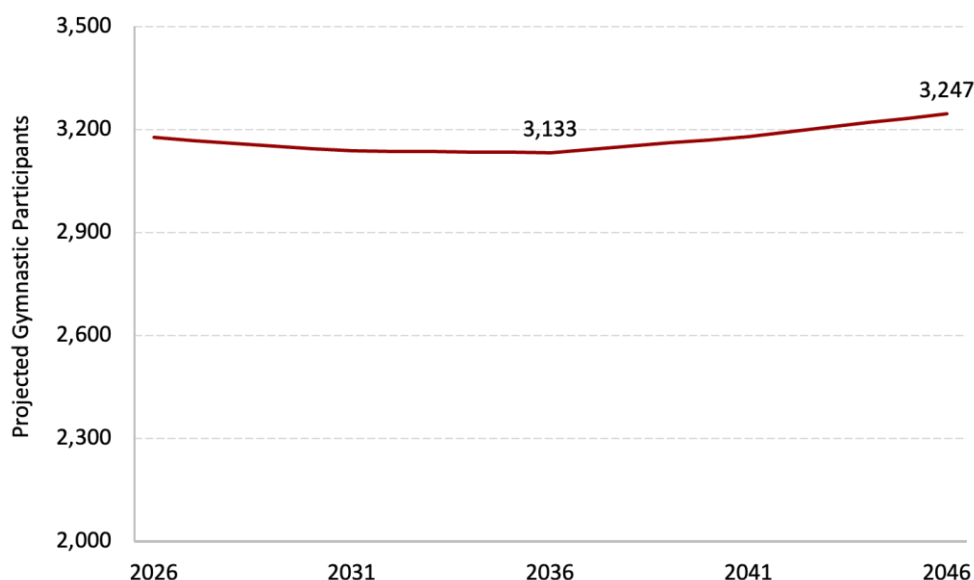


Figure 14 Projected Total Gymnastic Participants, Catchment, 2026 – 2046

Reviewing this against current in catchment facilities – including Robertson Gymnastics – current facilities account for approximately 1,800 members with Robertson Gymnastics the largest with at over 950 as of 2026. This indicates that only 56% of demand within the catchment is retained and met through local club members with the remainder travelling outside of the catchment.

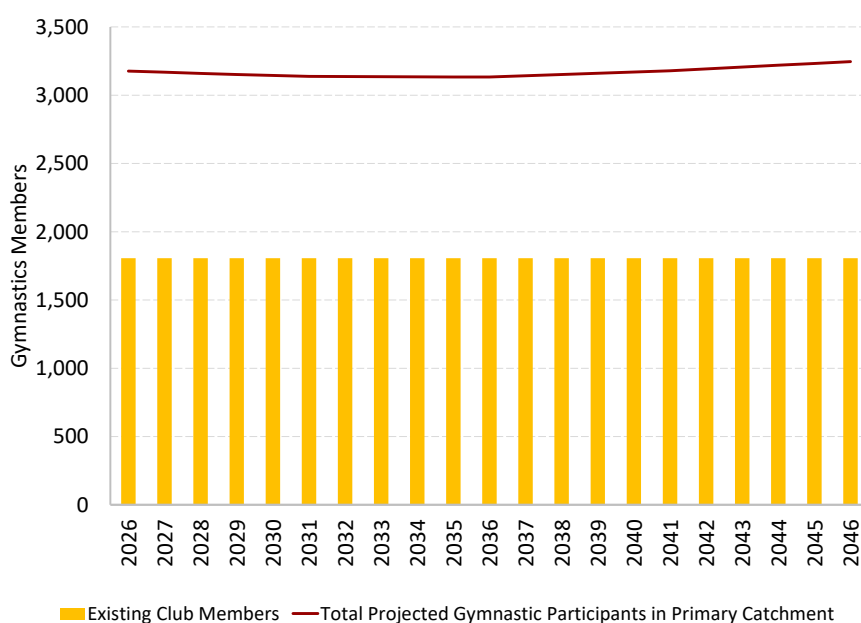


Figure 15 Gymnastics Participants and Current Club Members, Primary Catchment 2026 to 2046

This means there is a supply gap in gymnastics members within the catchment of over 1,370 members in 2026, which will grow to 1,441 members by 2046.

3.5.2 Robertson Gymnastics

The model confirms that Robertson Gymnastics is capturing only a minority portion of the underlying local participation base, with the current membership comparable to a retention of only 25% of local demand (and accounting for a 20% beyond catchment flow weighting in line with current membership rates). At 25% local market share, Robertson Gymnastics has a membership potential of 981 in 2026, growing to 1,015 in 2046.

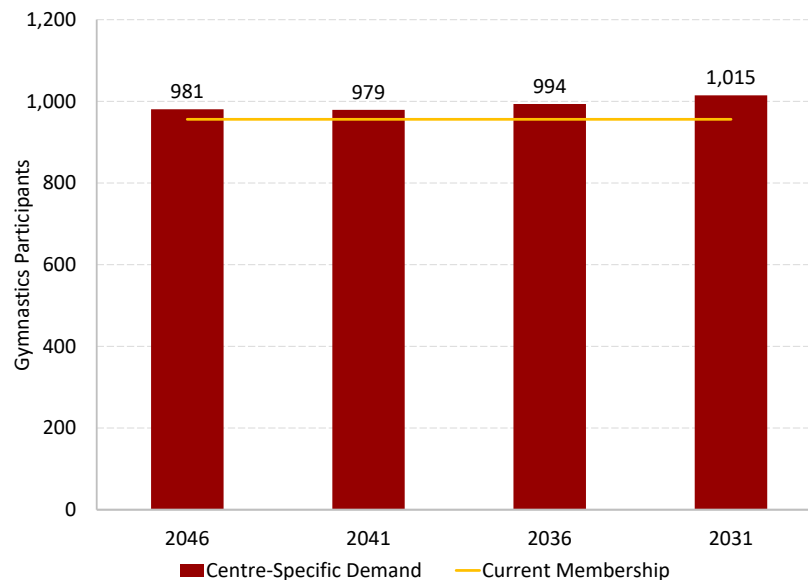


Figure 16 Projected Retained Gymnastic Participants, 25% Local Retention and 20% Beyond Catchment Weighting, Subject Site, 2026 – 2046

This indicates that the catchment generates sufficient underlying demand to support Robertson Gymnastics drawing only 25% of local demand. This means the downside risk to Robertson Gymnastics of a change in their member base and of that of the facility at the subject site, is extremely low. This supports the continued use of the site for gymnastics as an established and ongoing community use.

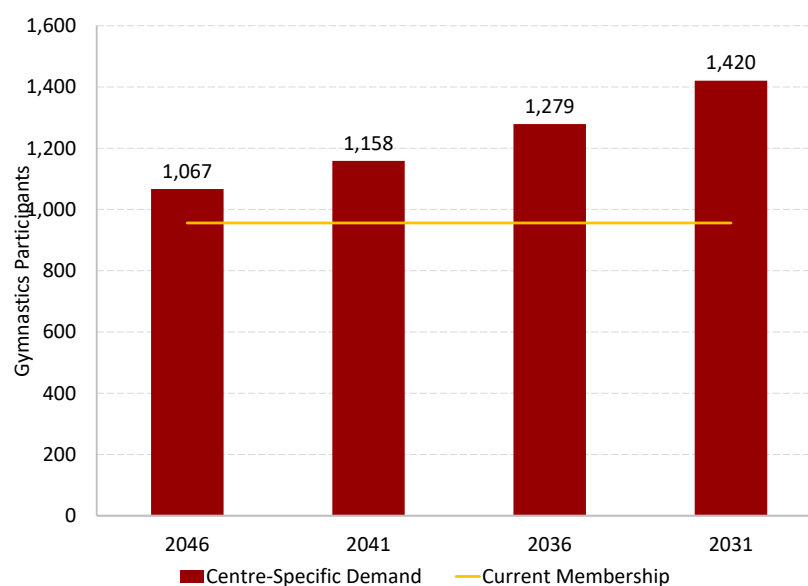


Figure 17 Projected Retained Gymnastic Participants, Growing to 35% Local Retention and 20% Beyond Catchment Weighting, Subject Site, 2026 – 2046

If anything, the risk is on upside membership growth. A growth over time to 35% primary catchment retention by 2046 (growth of 1.6% per annum), would see the number of participants grow significantly to reach 1,441.

4 LOCAL INDUSTRIAL MARKET ASSESSMENT

This section will assess the industrial market by profiling broad trends, then analysing local industrial land availability, business registrations, and building approvals.

4.1 National Industrial Market Trends

As the Australian economy decelerated, the performance of its industries weakened across the fiscal year. Capex growth declined, while value-add, sales, profits and employment generation grew at marginal rates.

Growth in Australian industry value-add was steady at 3.9% in the year to the June quarter 2025. Following a period of volatility during the pandemic, growth in industry value-add has decelerated since mid-2022. While most industries are now slowing, agriculture, utilities, arts and recreation, and administrative and support services continue to grow²⁵.

4.1.1 Industry Value Added Trends

For the purpose of this analysis, core sectors of the industrial economy in Australia include:

- Manufacturing
- Wholesale trade
- Transport, Postal and Warehousing

Data from the ABS industry catalogues indicates that in recent years, all major parts of Australia's industrial economy have experienced growth, rebounding in 2022/23 from the impact of the COVID19 pandemic on global economic activity before experiencing slower moderating growth to 2023/24.

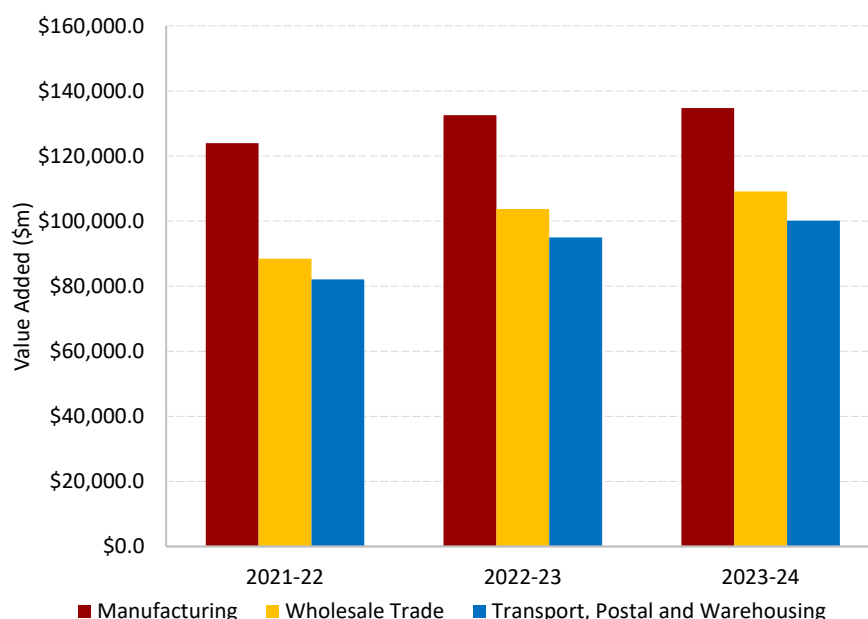


Figure 18 Industry Value Added, Select Industries, Australia, 2021/22 to 2023/24²⁶

While manufacturing remains the largest element of Australia's industrial economy, the growth rates in recent years in manufacturing has been 35-40% that of wholesale trade and transport, postal and warehousing sectors.

²⁵ Ai Group (2025) Factsheet: Industry performance in Australia accessed at <https://www.aigroup.com.au/resourcecentre/research-economics/factsheets/factsheet-industry-performance-in-australia/>

²⁶ ABS (2025) Australian Industry accessed at <https://www.abs.gov.au/statistics/industry/industry-overview/australian-industry/latest-release>

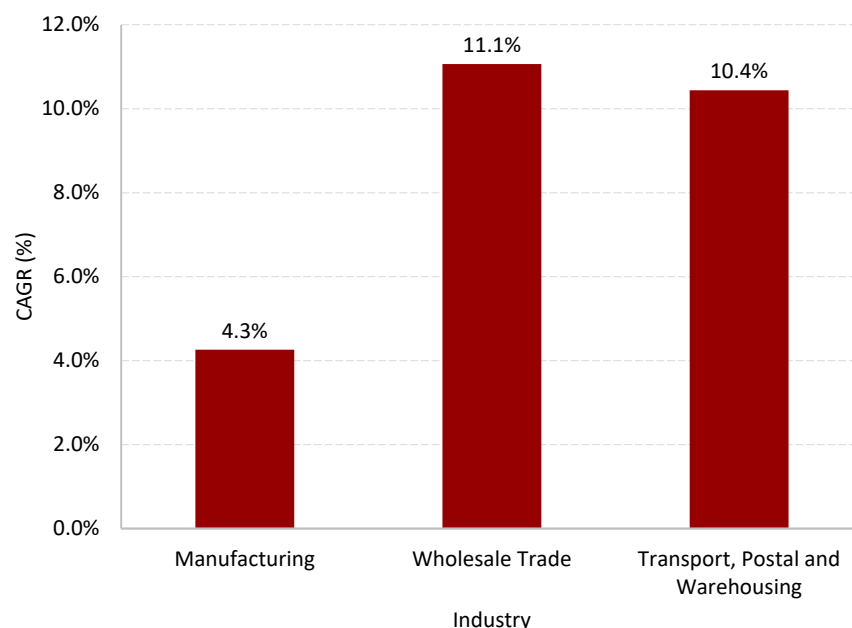


Figure 19 Compound Annual Growth Rate in Industry Value Added, Select Industries, Australia, 2021/22 to 2023/24²⁷

A more detailed examination of recent post COVID growth trends reveals that the strongest growth in activity has been in those industries most associated with local population serving sectors. As expected, food manufacturing remains the largest sector and experienced a robust increase in activity in 2023/24. This varies from most other manufacturing sectors which were either flat, or declining. The exceptions to this being Machinery and equipment, transport equipment, fabricated metal and non-metallic mineral products – all of which had very marginal increases over the last 3 fiscal years to 2023/24.

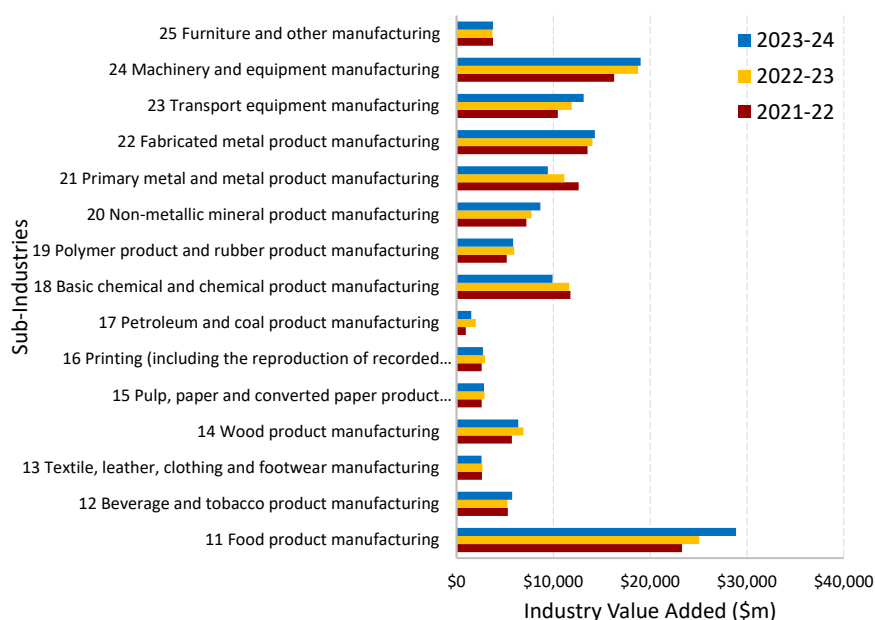


Figure 20 Industry Value Added, Manufacturing Sub-Industries, Australia, 2021/22 to 2023/24²⁸

²⁷ Same as above.

²⁸ Same as above.

In contrast, warehouse and transport support services sub-industries have experienced more robust growth - averaging 8.5-11.9% per annum growth post COVID with growth rates remaining positive year on year.

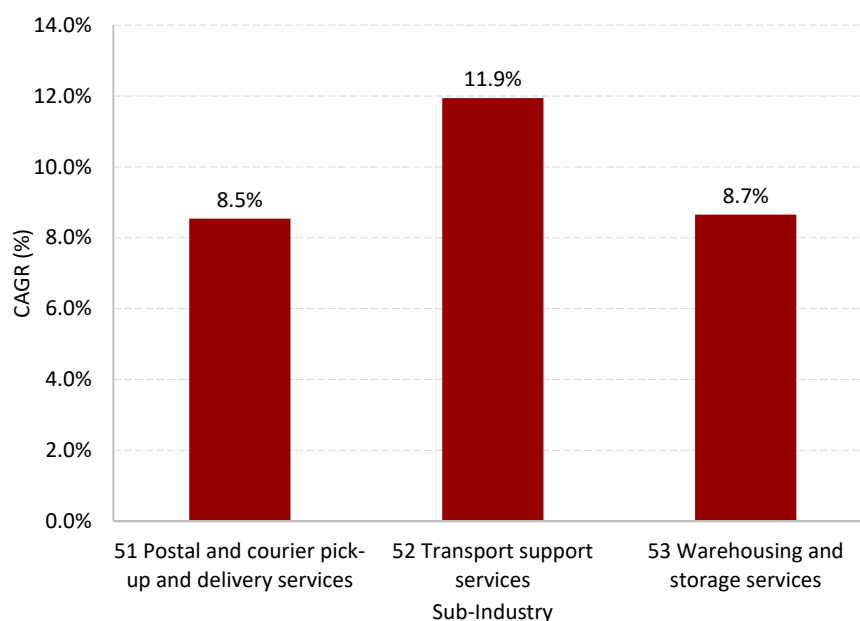


Figure 21 Compound Annual Growth Rate in Industry Value Added, Select Transport, Postal and Warehousing Sub-Industries, Australia, 2021/22 to 2023/24²⁹

4.1.2 Employment Projections

Australia is currently undergoing a transformative change in its industry practices with the onshoring and reshoring of manufacturing capabilities back into the domestic industrial supply chain. Programs such as the new Future Made in Australia Act which commits some \$22.7b over the next decade to support the development of production methods and industries targeted towards a net-zero emissions future. Furthermore, Government investment into regional manufacturing will lead to a required expansion in net-additional product being distributed into urban metropolitan centres³⁰.

With these trends in industry practices, Jobs and Skills Australia forecasts the count of manufacturing workers in Australia will cease its decline and moderate over the period of 2024 to 2029, before growing at a rate of approximately 1.3% per annum from the period of 2029 to 2035. Total manufacturing jobs in Australia are expected to reach 974,773 by 2035.

²⁹ Same as above.

³⁰ BDO Australia (2024), Australian Manufacturing Back in the Spotlight, accessed at <https://www.bdo.com.au/en-au/insights/manufacturing/australian-manufacturing-back-in-the-spotlight>

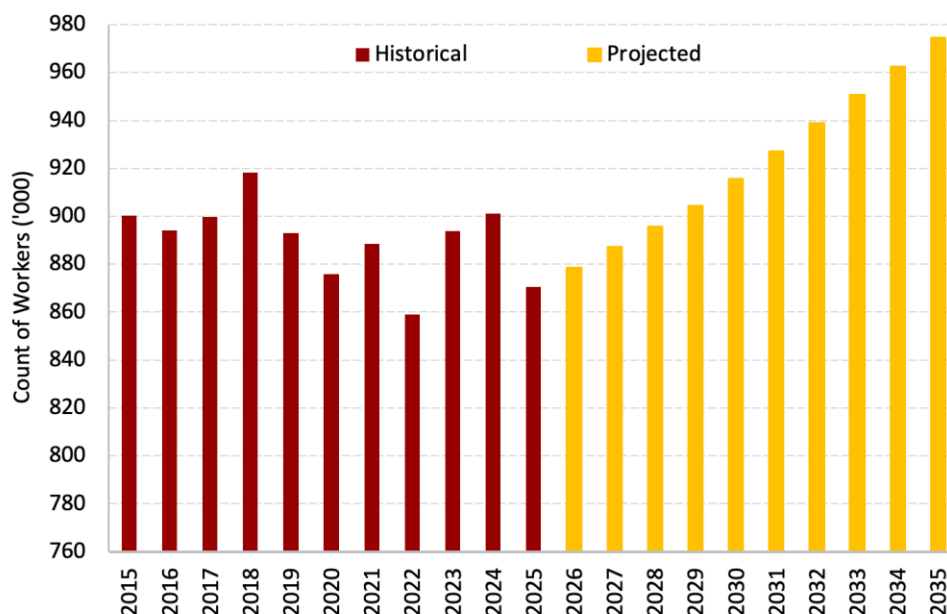


Figure 22 Historical and Projected Manufacturing Industry Employment, Australia, 2015 – 2035³¹

Over the ten-year period of 2025 to 2035 the number of workers employed in the Transport, Postal and Warehousing industry as projected by Jobs and Skills Australia is expected to rise from 754,100 to 821,000.

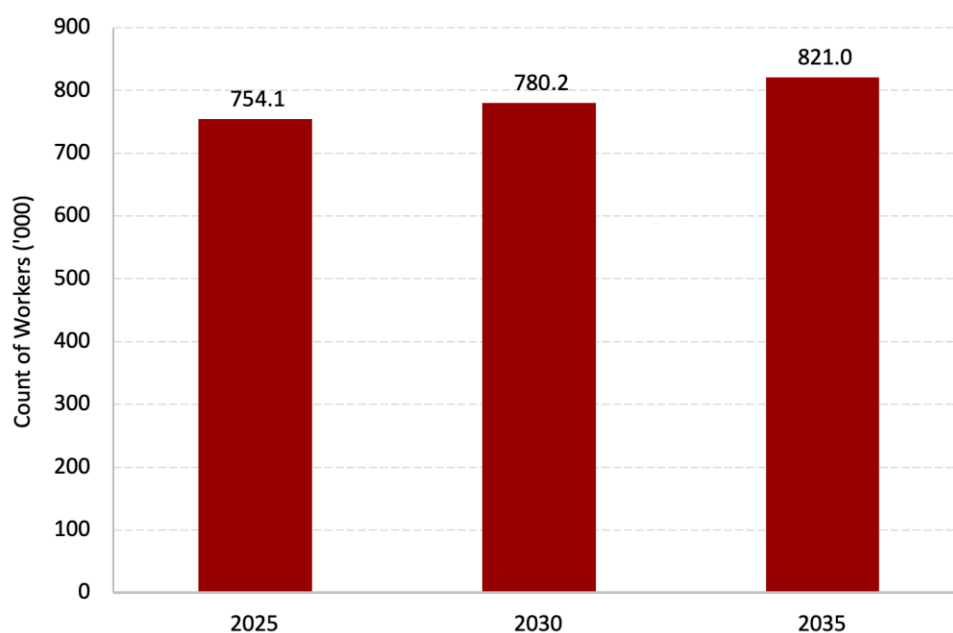


Figure 23 Employment Projections for Transport, Postal and Warehousing Industry, Australia, 2025 – 2035³²

This means that the manufacturing sector is expected to grow at a marginally higher rate compared to the transport, postal and warehousing sector over the next decade, albeit off a reduced base following years of decline.

³¹ Jobs and Skills Australia (2026), Manufacturing, accessed at <https://www.jobsandskills.gov.au/data/occupation-and-industry-profiles/industries/manufacturing>

³² Jobs and Skills Australia (2026), Employment Projections, accessed at <https://www.jobsandskills.gov.au/data/employment-projections>

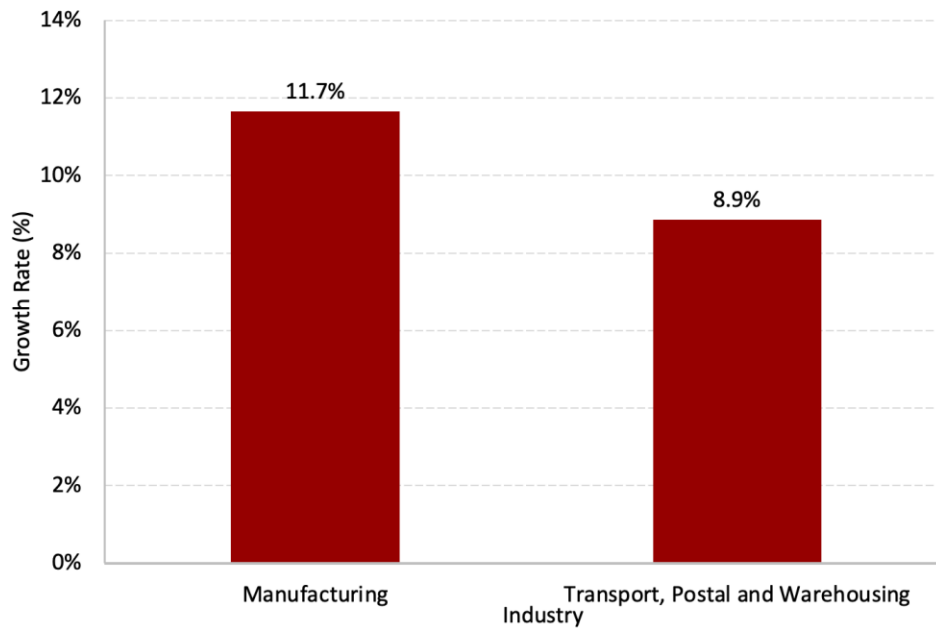


Figure 24 Growth Rate in Employment, Manufacturing and Transport, Postal and Warehousing Industries, Australia, 2025 – 2035³³

4.1.3 Tightening Industrial Property Market

Industrial property encompasses a commercial building that is used for both manufacturing and warehousing, the vacancy rate for such properties in Brisbane and Australia has fallen over the last 10-years.

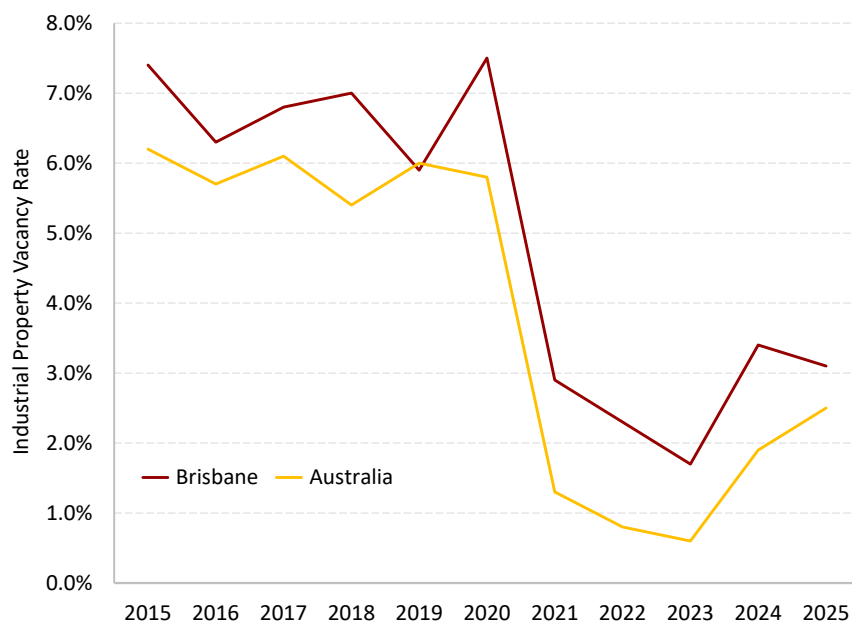


Figure 25 Industrial Property Vacancy Rate, Brisbane, & Australia, 2015 – 2025³⁴

Over the 10-year period of 2015 to 2025, the vacancy rate has declined from a high of 7.4% and 6.2% for Brisbane and Australia in 2015 to 1.7% and 0.6% in 2023, respectively. The vacancy rate since has increased again to 3.1% for Brisbane and 2.5% for Australia in 2025.

³³ Same as above.

³⁴ Collated by Econisis from multiple sources

4.1.4 Key Findings

Manufacturing remains the largest sector within Australia's industrial economy. Its recovery post-COVID has been patchy, and the impacts of Australian Government incentives and investments are not expected to fully impact the current flat/declining growth profile until post 2030. However, the longer-term growth outlook for manufacturing has strengthened, with those sub-industries linked to population servicing (food, furniture) as well as transport machinery and equipment manufacturing leading the way. Higher impact and heavy industries have seen post-COVID recoveries falter as global and national economic conditions weaken, though the overall manufacturing growth trajectory is now expected to outpace that of other key industrial sectors.

While transport, postal and warehousing related sectors have recovered robustly post-COVID-19, including non-direct transport related sub-industries such as couriers, transport support services and warehousing, the expected growth of the manufacturing sector now outpaces these. Nonetheless, while warehousing, logistics, transport services and wholesale trade will continue to drive industrial property market activity in the near term, the manufacturing growth outlook is expected to diversify demand.

4.2 Regional Housing Market Drivers

Sunnybank Hills is located within Brisbane's southern suburbs and, while not forming part of one of Brisbane's four designated Major Industrial Areas, contains light industrial zoned land directly adjacent to the South West Industrial Gateway. Brisbane City Council's Brisbane – Our Productive City paper provides the overarching strategic framework for industrial land use across the LGA, including areas such as Sunnybank Hills.

Projections in Brisbane – Our Productive City paper from Brisbane City Council indicate the SWIG will experience a 51% increase in industrial Gross Regional Product between 2016 and 2041³⁵.

³⁵ BCC (2025) Brisbane – Our Productive City accessed at <https://www.brisbane.qld.gov.au/content/dam/brisbanecitycouncil/corpwebsite/building-and-planning/documents/brisbane-our-productive-city.pdf.coredownload.pdf>

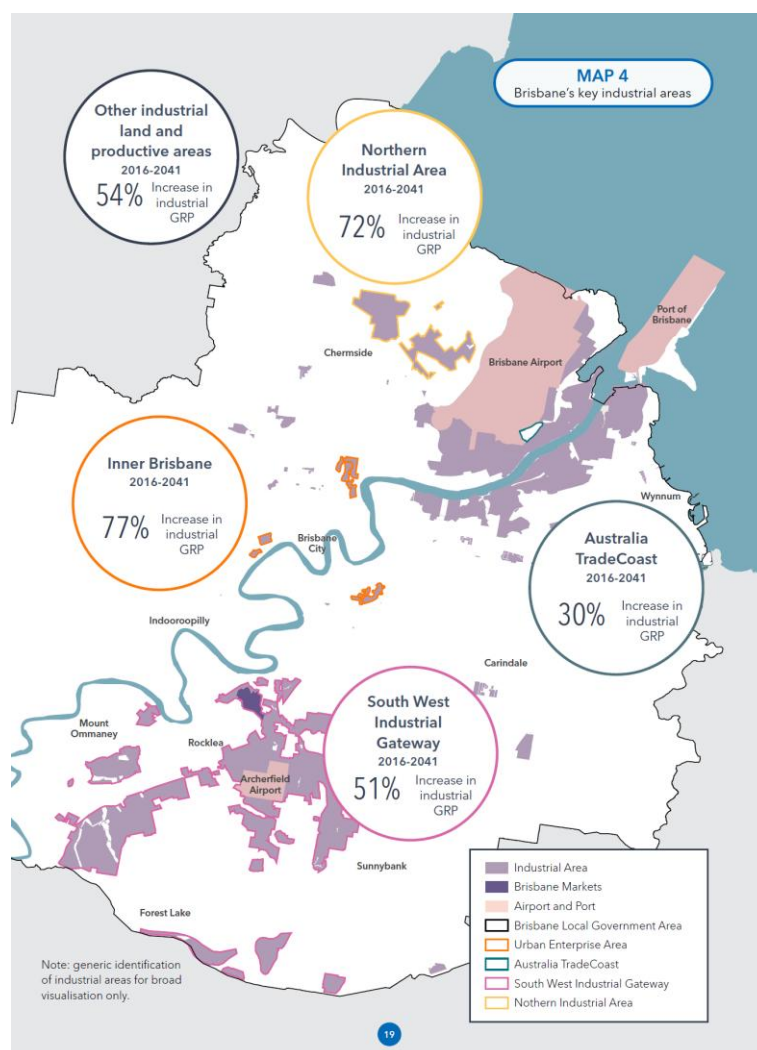


Figure 26 Brisbane Industrial Precincts

Brisbane's Our Productive Future recognises that:

*Industrial land use will evolve to meet the changing requirements of Brisbane.
Land supply will evolve to meet future demand for higher value industry uses.
Logistics and warehousing will be supported in key industrial locations.*

These principles recognise that while manufacturing has and will continue to be the largest sector of Brisbane's industrial economy, growth in warehousing and logistics is driving the need for industrial land to evolve and change in both use and form. For areas like Sunnybank, which accommodate light industrial uses in a predominantly residential and commercial context, this evolution raises important questions about where industrial activity is best located and concentrated. As Brisbane's industrial market continues to consolidate around well-connected, large-format precincts better suited to modern logistics and manufacturing requirements, smaller and more fragmented industrial holdings in suburban locations may be less capable of meeting contemporary demand. In this context the priority is ensuring that industrial land across the city is contributing meaningfully to economic output, and where it is not, that alternative uses are considered.

4.3 Local Industrial Market

4.3.1 Industrial Land Location Distribution

The subject site is located in the north west of the Sunnybank Hills SA2 and is the only zoned industrial site in that part of the SA2 with all other adjoining industrial areas, to the south and west of the site and of the

Bradman Street/Landseer Street intersection located within the Rocklea-Acacia Ridge SA2. This distinction is important as the combination of the rail line and the lack of directly adjacent industrial land means the subject site sits somewhat isolated from the remainder of industrial activity in the area.



Figure 27 Location of 200 Bradman Street, Sunnybank Hills

The Rocklea-Acacia Ridge industrial precinct is a premier logistics, freight, and manufacturing hub in Brisbane's south. Crucial to Queensland's supply chain, it drives the regional economy by providing large-scale employment in transport, warehousing, and trade.

Located 12 to 15 kilometres south of the Brisbane CBD, the Rocklea-Acacia Ridge precinct sits at a major arterial crossroads.

- **Logistics Routes:** Provides rapid, heavy-vehicle access to the Ipswich Motorway, Pacific Motorway, Logan Motorway, and the Gateway Motorway.
- **Port and Airport Access:** Enables efficient distribution chains directly to the Port of Brisbane and Brisbane Airport, and neighbours the general aviation hub of Archerfield Airport.

Due to the position of the site within the Sunnybank Hills SA2, that location and its role in the local industrial market have been assessed.

4.3.2 Employment Trends

Sunnybank Hills SA2 saw total employment by place of work rise steadily from 2,840 in 2011 to 3,132 in 2016, then to 3,597 in 2021. This indicates continued growth in the local employment base over the decade. Note that as the employment value for mining from 2011-16 was zero, no CAGR can be derived.

Manufacturing declined sharply from 142 in 2011 to 52 in 2016, before partially recovering to 85 in 2021. Even with that recovery, it remained well below its 2011 level, suggesting a smaller manufacturing footprint. Transport, Postal and Warehousing was broadly stable, edging down from 94 in 2011 to 89 in 2016, then increasing to 105 in 2021. Wholesale Trade showed the strongest contraction of the three sectors, falling from 69 in 2011 to 42 in 2016 and then to 30 in 2021.

The industrial sector within Sunnybank Hills SA2 (defined as Manufacturing, Wholesale Trade, and Transport, Postal and Warehousing) contracted, declining from 305 jobs in 2011 to 183 jobs in 2016, before rising to 220 jobs in 2021, below historic levels.

Table 4 Employment by Industry, Sunnybank Hills SA2, 2011 – 2021³⁶

Industry of Employment	2011	2016	2021
Agriculture, Forestry and Fishing	7	15	10
Mining	0	0	5
Manufacturing	142	52	85
Electricity, Gas, Water and Waste Services	4	4	7
Construction	129	143	171
Wholesale Trade	69	42	30
Retail Trade	559	601	696
Accommodation and Food Services	185	298	330
Transport, Postal and Warehousing	94	89	105
Information Media and Telecommunications	22	28	37
Financial and Insurance Services	77	95	82
Rental, Hiring and Real Estate Services	172	220	233
Professional, Scientific and Technical Services	208	215	187
Administrative and Support Services	80	122	150
Public Administration and Safety	110	29	40
Education and Training	201	253	344
Health Care and Social Assistance	587	690	748
Arts and Recreation Services	27	23	52
Other Services	171	216	283
Total	2,840	3,132	3,597

From the above census data, the following CAGR have been derived. Of all the employing industrial sectors within Sunnybank Hills SA2, only Transport, Postal and Warehousing had a positive CAGR from 2011 – 2021 of 1.1%. Manufacturing contracted with a CAGR of -5.0%, and Wholesale Trade with -8.0%. This resulted in the industrial employing sector within Sunnybank Hills SA2 as a whole contracting with a CAGR of -3.2% from 2011 – 2021.

Table 5 Employment CAGR by Industry, Sunnybank Hills SA2, 2011 – 2021³⁷

Industry of Employment	2011 – 2021 CAGR
Agriculture, Forestry and Fishing	3.6%
Mining	-
Manufacturing	-5.0%
Electricity, Gas, Water and Waste Services	5.8%
Construction	2.9%
Wholesale Trade	-8.0%
Retail Trade	2.2%
Accommodation and Food Services	6.0%
Transport, Postal and Warehousing	1.1%
Information Media and Telecommunications	5.3%
Financial and Insurance Services	0.6%
Rental, Hiring and Real Estate Services	3.1%

³⁶ ABS (2022) Tablebuilder, accessed at abs.gov.au

³⁷ ABS (2022) Tablebuilder, accessed at abs.gov.au

Industry of Employment	2011 – 2021 CAGR
Professional, Scientific and Technical Services	-1.1%
Administrative and Support Services	6.5%
Public Administration and Safety	-9.6%
Education and Training	5.5%
Health Care and Social Assistance	2.5%
Arts and Recreation Services	6.8%
Other Services	5.2%
Total	2.4%

Applying the historical 10-year CAGR to the 2021 employment base provides an indication of future employment trends. Under this approach, total employment is projected to increase by 959 jobs, while employment in the industrial sector within the SA2 is forecast to decline by 39 jobs.

Table 6 Employment Projections, Sunnybank Hill SA2, 2021 – 2031

Industry of Employment	2021	2031	Gain/Loss
Agriculture, Forestry and Fishing	10	14	+4
Mining	5	-	-
Manufacturing	85	51	-34
Electricity, Gas, Water and Waste Services	7	12	+5
Construction	171	227	+56
Wholesale Trade	30	13	-17
Retail Trade	696	867	+171
Accommodation and Food Services	330	589	+259
Transport, Postal and Warehousing	105	117	+12
Information Media and Telecommunications	37	62	+25
Financial and Insurance Services	82	87	+5
Rental, Hiring and Real Estate Services	233	316	+83
Professional, Scientific and Technical Services	187	168	-19
Administrative and Support Services	150	281	+131
Public Administration and Safety	40	15	-25
Education and Training	344	589	+245
Health Care and Social Assistance	748	953	+205
Arts and Recreation Services	52	100	+48
Other Services	283	468	+185
Total	3,597	4,556	+959

4.3.3 Industrial Floor Space Projections

Brisbane City Council has projected non-residential floor space by SA2, the table below shows the estimates for Sunnybank Hills SA2. The table includes 2018 as a historical reference point, with the LGIP amendment's base year being 2021, and projects forward in 5-year intervals to 2041, and Ultimate Development. In this context, Ultimate Development means the long-run full-build-out capacity assumed under the planning framework. Council's projections for this table were prepared as part of Brisbane City Council's LGIP Amendment 1B, which was adopted on 20 May 2025 and came into effect on 27 June 2025³⁸.

³⁸ Brisbane City Council (2026) Find an adopted amendment, accessed at <https://www.brisbane.qld.gov.au/building-and-planning/planning-and-design/find-an-adopted-amendment>

Table 7 Projected Non-Residential Floorspace, Sunnybank Hills SA2, 2018 – 2041³⁹

Development Type	2018	2021	2026	2031	2036	2041	Ultimate Development
Retail	47,603	47,934	50,811	54,496	56,575	59,329	107,649
Commercial	14,720	14,877	15,621	16,696	17,076	17,659	37,702
Industrial	5,052	5,042	5,032	5,023	5,013	5,003	4,994
Community	23,167	26,019	29,677	33,694	36,946	38,940	38,940
Total	90,542	93,872	101,142	109,909	115,610	120,932	189,284

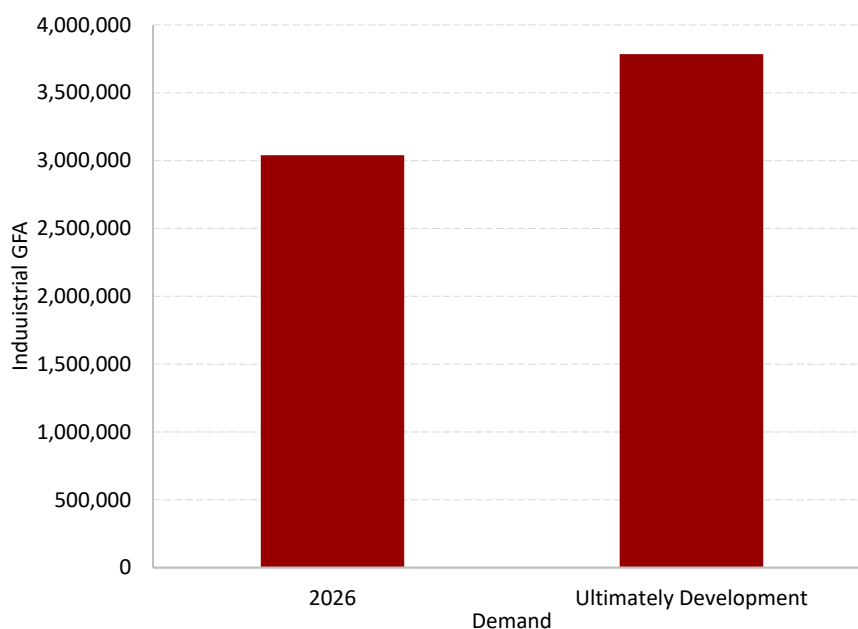
Industrial floor space in the Sunnybank Hills SA2 is small and declining. At 5,052 sqm in 2018, it represents less than 6% of total non-residential floor space, and Council's projections show a slow but uninterrupted contraction to 5,003 sqm by 2041, with Ultimate Development projected even lower at 4,994 sqm. This contrasts with every other development type, all of which are projected to grow. Retail, Commercial and Community Purpose floor space are each expected to expand between 2018 and 2041, suggesting significant long-run growth capacity within the framework. Industrial, by contrast, has no such upside.

The projected decline in industrial floor space aligns with the employment trends observed in the SA2. Industrial employment contracted from 305 jobs in 2011 to 220 jobs in 2021, and projections applying that trend forward point to a further loss of 39 industrial jobs by 2031, reinforcing the view that industrial activity in Sunnybank Hills SA2 is on a structural decline. The gradual contraction of industrial activity in Sunnybank Hills is consistent with the consolidation of Brisbane's industrial economy around purpose-built precincts such as the adjacent South West Industrial Gateway, where a 51% increase in industrial Gross Regional Product is projected from 2016 to 2041.

4.3.4 Available Industrial Floor Space

There is limited industrial floor space within Sunnybank Hills SA2.

Industrial land and floor space in the area is concentrated in the Rocklea-Acacia Ridge SA2. With demand in 2026 estimated in the LGIP at 3.04m sqm GFA of industrial land, representing only 80% of the estimated ultimate development capacity for industrial land within that area.



³⁹ Brisbane City Council (2025) Projected Non-Residential Floorspace, accessed at <https://www.brisbane.qld.gov.au/content/dam/brisbanecitycouncil/corpwebsite/building-and-planning/documents/current-table-sc-3-1-5-existing-and-projected-non-residential-floor-space.xls>

Figure 28 Rocklea Acacia Ridge SA2 Industrial Land Demand 2026 and Ultimate Development Scale⁴⁰

The primary industrial precinct adjacent to Sunnybank Hills SA2 is centred on the western side of Jackson Road, a cluster of low-to-medium bay industrial and warehouse properties within the Rocklea-Acacia Ridge SA2 low impact industry zone. Available stock in the precinct is limited, with active listings concentrated at a small number of addresses.

The most directly comparable current lease listing is Unit 2/175 Jackson Road, a 1,323 sqm warehouse offered at \$171,990 per annum (excluding GST), equating to approximately \$130/sqm per annum⁴¹. A 1,367 sqm property at the same address has also recently been re-listed⁴².

On the sales side, Colliers is currently marketing 18 new strata units at 149 Jackson Road under the "Horizons Sunnybank Hills" banner, with unit sizes ranging from 299 to 758 sqm; pricing has not been publicly disclosed and is available on application.

These listings sit within a broader Brisbane southside market that, as of 2025, was recording prime net face rents averaging \$155-\$160/sqm for properties above 2,000sqm and \$165-\$175/sqm for those below 2,000sqm⁴³. Sunnybank Hills, as a secondary suburban precinct with older building stock and limited large-format capability, would be expected to sit at or below the lower end of that range, consistent with the ~\$130/sqm observed in the active lease listing. Knight Frank's 2025 Australian Industrial Review placed Brisbane secondary net face rents at \$115/sqm on average, with the South submarket recording rent growth of under 3%, significantly below the Trade Coast's 14% growth on vacancy of 3%⁴⁴.

Vacancy conditions in the South Brisbane submarket have loosened relative to recent years. Brisbane's industrial vacancy rate reached 4.2% in Q2 2025, the highest since 2020. Incentives across Brisbane rose to 10-15% by mid-2025, softening effective rents and shifting conditions in favour of tenants⁴⁵. At \$161/sqm, the Brisbane South submarket records the lowest prime net face rent of any Brisbane precinct, (\$45/sqm below the Trade Coast and \$44/sqm below the North), and carries the highest vacancy of any submarket at 6.7%⁴⁶, a combination that reflects an oversupply of industrial space relative to occupier demand in the area surrounding Sunnybank Hills.

4.3.5 Key Findings

Sunnybank Hills SA2 has minimal industrial offering. The subject site is one of the few locations zoned industrial within the SA2, with all other adjacent industrial sites located within the Rocklea-Acacia Ridge SA2 including that located on Jackson Road to the east of Bradman Street. LGIP projections indicate no growth in demand for industrial floor space with the adjacent Rocklea-Acacia Ridge SA2 like to be more than sufficient to meet current and future local industrial demand.

Additionally, the subject site is not and has not been used for industrial purposes in the medium term without causing market issues in the industrial sector. Market indicators on vacancy and rents locally and in the wider Southern Brisbane sub-market, do not, at this stage, indicate any market supply stress.

The continuation of the current land use is therefore unlikely to impact the industrial market in the wider region, given the predominance of industrial floor space in surrounding locations.

⁴⁰ As above

⁴¹ Commercial Real Estate (2025) Unit 2/175 Jackson Road, accessed at <https://www.commercialrealestate.com.au/property/unit-2-175-jackson-road-sunnybank-hills-qld-4109-16659347>

⁴² Commercial Real Estate (2026) 3/175 Jackson Road, accessed at <https://www.commercialrealestate.com.au/property/3-175-jackson-road-acacia-ridge-qld-4110-17073824>

⁴³ Industrial Commercial Partners (2025) Brisbane Commercial & Industrial Property Market Review, accessed at <https://industrialcommercialpartners.com.au/news/brisbane-commercial-iretail-property-market-reviewsseptember2024-xgces>

⁴⁴ Property Council of Australia (2025) Record industrial development leading to divergence, accessed at <https://www.propertycouncil.com.au/property-australia/record-industrial-development-leading-to-divergence-in-vacancy-rates-and-rents>

⁴⁵ As above

⁴⁶ Tenant CS (2025) Australian Industrial Leasing Snapshot, accessed at <https://tenantcs.com/blog/industrial-market-overview>

4.4 Alignment to Brisbane City Town Plan

The proposed indoor sport and recreation use is considered consistent with the intent of the Low Impact Industry Zone Code and Industry Code under Brisbane City Plan 2014.

The proposal aligns with Overall Outcome 2.i of the Low Impact Industry Zone Code, which envisages indoor sport and recreation uses that are small-scale in nature, support industry activities and serve local industrial workers. The existing gymnastics facility primarily functions as a community-based recreation service supporting regular participation by residents and workers within the surrounding catchment.

While the facility may occasionally support inter-club activities within the broader gymnastics network, its primary role remains local in character and scale. The use does not operate as a destination entertainment or major event venue and is not considered to generate activity levels that would compromise the ongoing industrial function of the locality.

The proposal is also considered consistent with PO26 of the Industry Code, as the use remains low key in scale, nature and employment relative to surrounding industrial activities. The facility operates predominantly within an enclosed indoor environment and provides a complementary recreation function that supports community wellbeing and local workforce amenity without undermining the primary industrial role of the precinct.

Overall, the proposed use represents a compatible and supportive non-industrial activity within the Low Impact Industry Zone that maintains alignment with the strategic intent of Brisbane City Plan 2014.

5 ECONOMIC AND COMMUNITY BENEFIT ASSESSMENT

This section evaluates the benefits of the current usage of the site using a net economic and community benefit assessment approach.

5.1 Cost Benefit Analysis

5.1.1 Methodology

A CBA is the most commonly used, and most comprehensive, of the economic evaluation techniques. Essentially, a CBA compares the monetised benefits and costs of a project to evaluate the desirability of a project. For this assessment, only the benefits have been considered.

This approach is the most appropriate to assess the economic benefits that accrue from the continued use of the subject site.

The CBA steps for a community benefit assessment include:

- Identify the quantifiable benefits that can be monetised.
- Calculate the value (in monetary terms) of the quantified incremental benefits in present value (PV) terms using the discount rates.

5.1.2 Discount Rates

Discounting is the reverse of adding (or compounding) interest. It reduces the monetary value of future benefits back to a common time dimension – the base date. Discounting satisfies the view that people prefer immediate benefits over future benefits (social time preference), and it also enables the opportunity cost to be reflected (opportunity cost of capital). Recognising the potential for multiple audiences for the business cases, real discount rates of 4, 7 and 10% have been applied. This complies with recommendations set by the Australian Government Department of Prime Minister and Cabinet Office of Impact Analysis CBA Guidance Note and QLD Treasury Project Evaluation Guideline and Standard Business Case template.

Modelling of quantifiable benefits are developed over a 20-year timeframe (post initial year).

5.1.3 Benefits-Only Assessment

The community benefit assessment undertaken in this report evaluates benefits only. Because Robertson Gymnastics Centre is an established, operating facility, there is no proposed capital investment to assess. The analysis therefore does not apply costs to the assessment. Instead, it focuses on quantifying the economic and social benefits that the existing use generates for the community, to inform the question of whether the continued use of the site for gymnastics represents a higher and better use than the industrial purposes envisaged under the current zoning. The benefits identified in the analysis therefore reflect what the community would forgo if the gymnastics use were not formalised — that is, the community value that the existing use delivers in its current strategic position within southern and south west Brisbane..

5.1.4 Assumptions

Econisis has made the following assumptions applicable for the assessed facility.

Table 8 Key Assumptions

Assumptions	Value
Health and Wellbeing Participation Benefit (per person) ⁴⁷	\$693
Youth Discount on Adult Health and Wellbeing	50%
Leisure Value of Time ⁴⁸	\$20.40

⁴⁷ KPMG (2021) Social Value of Sport accessed at <https://assets.kpmg.com/content/dam/kpmg/au/pdf/2021/social-value-of-sport.pdf>. Values from 2018 adjusted to \$2024/25 by Econisis using CPI

⁴⁸ ATAP (2017) Parameter Values accessed at <https://www.atap.gov.au/parameter-values/index> adjusted to \$2024/25 by Econisis using CPI

Assumptions	Value
Average Domestic Tourism Expenditure per Person per Day ⁴⁹	\$180.00
Site Employment Intensity (Number of Workers Based on Workspace Ratios) ⁵⁰	17
Sports and Recreational Worker Productivity Value (annual) ⁵¹	\$102,202
Facility Events per Year ⁵²	4-6
Average Event Attendance	250 (100-400) ⁵³
Average Attendances per Member per Week	1.25
Weeks Operational Per Year	46

5.1.5 Identified Benefits

Econisis has identified a diverse range of economic and social benefits associated with the Project.



Figure 29 Identified Benefits

Detail on each benefit and the calculation method is identified below in the following Benefit Statement.

Table 9 Benefits Statement and Calculation Methods

Benefit Name	Benefit Description	Calculation Method
Member Health and Wellness Benefit	Improved health outcomes in the community through access to sports and increased resident participation.	A health and wellness participation benefit per person of \$694 has been applied to each person based on Gymnastic Participation numbers. Participation is split into youth (under 14yo) and adult (15+) shares. A 50% youth discount has been applied to the youth wellbeing benefits.
Member Recreation & Leisure Benefits	The recreation and leisure benefit to Sunnybank residents in the form of the participation in gymnastics	The leisure benefits of sports participation were calculated based on gymnastic participation associated with the centre from Robertson Gymnastics data. This includes average attendance and duration data (1.25 days a week, 1.25 hours per class, 46 weeks per year). A 50% youth discount has been applied to the youth leisure benefits.
Gymnastic Facility Access/Travel Time Savings Benefits	The benefit of the location of the facility in terms of member and attendee accessibility.	Accessibility benefits valued using Australian Transport Assessment Panel travel time values (in line with leisure values per hours. Assumes 2 travellers per vehicle trip per leg in line with 1.25 days per week and 46 weeks per year. Travel time savings of 15minutes allocated, based on average distance of participants to access next 4 closest facilities. 50% Rule of Half applied in line with transport economics standards.
Sport and Recreation Economic Productivity	Economic value of the sport and recreation activities added to the region by the site.	Economic value estimated by applying average workspace ratios (sqm per worker) to provide an estimate of economic intensity of the facility. This is then valued at an annual Sport and Recreation industry productivity value.
Event Participant and Attendee Benefits	The economic visitation and leisure benefits of attraction of non-local players/competitors and visitors to events.	Measured for 2 cohorts – visiting participants and visiting non-participating attendees. Assumed average of 1 attendee per participant. Visiting participant value based on recreation leisure time per hour, based on a 2.5-hour event 5 times per year.

⁴⁹ TRA (2026) Domestic Tourism, accessed at <https://www.tra.gov.au/en/tourism-statistics/domestic-tourism-statistics-results>

⁵⁰ Based on workspace ratios of 92.4 for leisure facilities; <https://www.cityofsydney.nsw.gov.au/-/media/corporate/files/publications/research-and-reports/floor-space-and-employment-survey-2022/floor-space-and-employment-survey.pdf?download=true>

⁵¹ Economy ID (2025) Worker Productivity Arts and Recreation Industry, Brisbane LGA, accessed at <https://economy.id.com.au/comseq/worker-productivity-by-industry?WebID=100>

⁵² Data provided by Robertson Gymnastics

⁵³ As above

Benefit Name	Benefit Description	Calculation Method
		Daytrip tourism expenditure for Brisbane used as a proxy value for non-participant attendee value and impact. Applied \$180 per non-attendee visitor. Converted to Gross Value Added based on tourism satellite account output to GVA ratio average (75%).
		Applied 65% weighting to account for existing club members (to remove double counting).

5.1.6 Results

Overall, Econisis estimates that over 20 years, the Robertson Gymnastics Centre in its current location will generate between \$20.25m in present value benefits at 4% discount rates, to \$31.09m at the 4% discount rates.

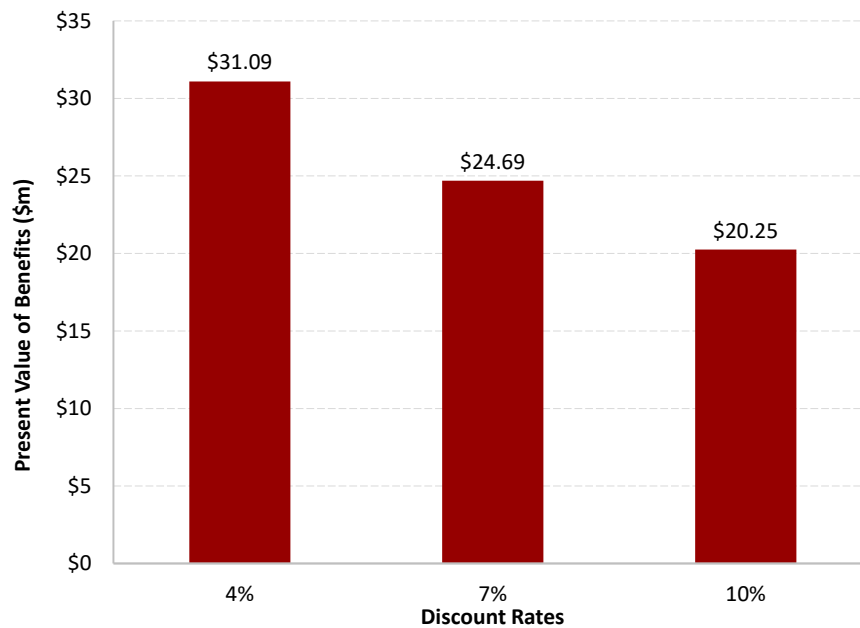


Figure 30 Present Value of Benefits by Discount Rate

A review of benefits at the 7% discount rate level, sport and recreation economic productivity is the largest benefit at \$10.1m over 20 years. This highlights the importance of the site as an economic generator, reflecting the contribution that clubs like Robertson Gymnastics Centre make to local and regional economies. This is followed by member health and wellness (\$4.9m) and member recreation and leisure benefits (\$4.5m).

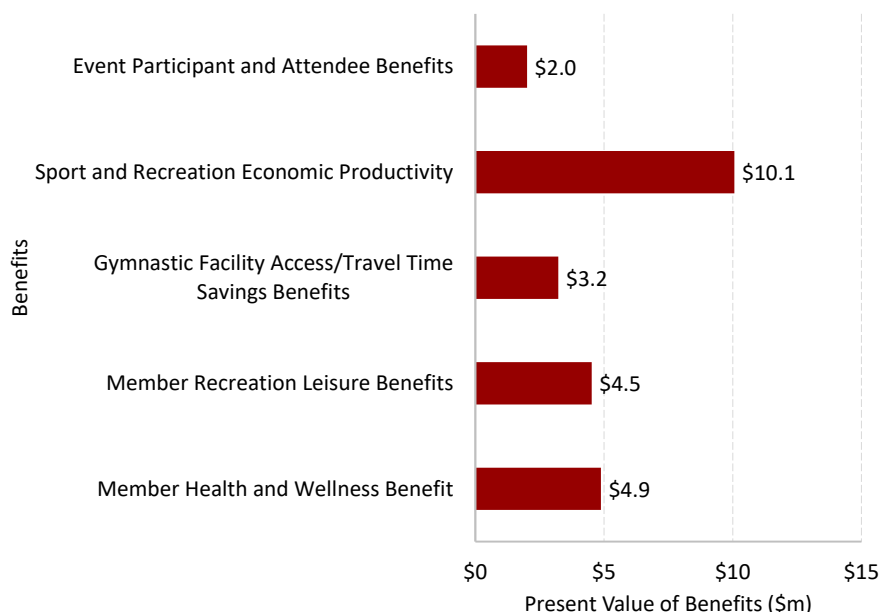


Figure 31 Composition of Benefits by Benefit, 7% Discount Rate

5.2 Wider Economic and Community Benefits

Note not all economic and community benefits of Robertson Gymnastics Centre are captured in the CBA. Further wider economic and community benefits are identified, defined and described below, including:

- **Dedicated facility certainty of tenure of clubs and participants** – the provision of a dedicated single use facility with certainty of ownership and tenure provides members confidence in being able to enrol and participate in gymnastics activities. Shared sport and recreational facilities such as through schools, can offer temporary solutions but regularly result in a club being forced out as school activities take priority. This is a particularly relevant experience for Robertson Gymnastics that had previously been based out of Robertson State School. The dedicated centre, outside and on the fringe of a larger industrial estate, means that issues of use conflict between heavy vehicles and equipment and youth sport and recreation are minimised.
- **Strategic position for access**– the centre located within the sub-region of Sunnybank Hills and Acacia Ridge allows for maximum access to gymnastics competitors across multiple disciplines from across southern and south western Brisbane. The Bradman Street provides robust connections to the wider regional road carrying members to and from the Centre north, south east and west.
- **Youth participation and reducing at-risk behaviours**– the high proportion of youth participating in gymnastics means the Centre provides a structured outlet for non-ball, non-contact physical and competitive recreation that has been proven to be highly effective in ensuring young people remain social engaged and engaged in education and training during formative years.
- **Sport and recreation coaching training** – through formal training provided at Robertson Gymnastics, the club has supported over 150 coaches receiving their formal qualifications, fostering a depth of coaching talent that is supporting the next generation of athletes.
- **Major international entertainment and high performing athletes** – members of Robertson Gymnastics have gone on to compete at national and international events, as well as become part of global entertainment franchises such as Cirque de Soleil. This brings attention to Australia and Brisbane as a competitive gymnastics and athletic centre of note across the world.
- **Multi-disciplinary/multi-use gymnastics centre** - As highlighted in the Robertson Gymnastics offering is unique nature of the centre as a comprehensive multi-disciplinary offering compared to more narrow gymnastics service providers in the area. This extends from more recreation and play based activities for

toddlers and infants, through the State and nationally competitive athletic and artistic gymnastics and trampolining and older age recovery and rehabilitation based activities (which are currently expanding to 100+ members in the short-term).

6 CONCLUSION

This section provides a summary of key findings and recommendations from the report.

6.1 Summary of Findings

200 Bradman Street Sunnybank Hills has been home to one of the region's largest gymnastics clubs – Roberston Gymnastics – since 2018 and now has over 950 members of all ages from right across South East Queensland. Approximately 80% of members travel from the local region – covering the SA3s of Nathan, Rocklea-Acacia Ridge and Nathan – visiting 1 to 2 times a week for a range of beginner to international athletic training and competitive events.

Demand for gymnastics – as an indoor sport and recreation activity – is robust in the subject site's catchment, with Robertson Gymnastics meeting approximately 25% of regional demand. The remainder of demand is met through smaller facilities/clubs in the area along with strong outflow from the catchment to other facilities and clubs across Greater Brisbane. This underlying demand expected to remain consistent out to 2046, meaning there is limited downside risk to current membership numbers and instead there is strong upside potential for growth through increased market share and greater local demand retention. This along with the long-term nature of the current use at the subject site, supports the maintenance of the use of 200 Bradman Street for indoor sport and recreation uses.

In contrast, the subject site is unique within Sunnybank Hills for its industrial zoning, with all other industrial land near by located within the Rocklea-Acacia Ridge SA2. Outside of the Jackson Road precinct, all other major tenancies are located to the west. Industrial employment growth in Sunnybank Hills has been negative in recent years and floor space growth, according to LGIP, is also expected to remain negative over the next decade. Catchment industrial market indicators, including rents, remain below sub-regional averages, while existing development opportunities and industrial land capacity within the Rocklea-Acacia Ridge SA2 reduce immediate pressure on the subject site for industrial redevelopment.

Importantly, the continued use of the site for indoor sport and recreation does not permanently sterilise the land from future industrial use. The existing built form and operational characteristics of the facility are broadly compatible with industrial warehouse outcomes and the site could be transitioned back to a more traditional industrial use in the future if market conditions change. In this regard, the proposal does not compromise the long-term industrial function of the precinct and remains generally consistent with the intent of the Low Impact Industry Zone Code and Industry Code under Brisbane City Plan 2014, including provisions relating to small-scale indoor sport and recreation uses that support local workers and do not detrimentally impact the primary industrial role of the area.

Econisis estimates that, using a cost benefit analysis method, the use of the subject site for indoor sport and recreation will generate between \$20m and \$31m in economic, sport health and leisure, event and travel savings benefits over 20 years (depending on the discount rates) for Robertson Gymnastics members, visitors and the local economy. This recognises the importance of the site as a sport and recreation activity of regional economic significance that justifies the continuation and retention of its current use in the long-term.

Overall, the Roberston Gymnastics Centre at 200 Bradman Street, Sunnybank Hills provides a uniquely comprehensive, multi-disciplinary gymnastics offering that underpins state and national competition, global athletic and entertainment performers, gymnastics coach training and accreditation and youth and aged person recreation and health outcomes all within a dedicated, strategically positioned and secure environment.

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