The Sunshine Coast and South-east Queensland … missing links?

Office of Engagement
University of the Sunshine Coast

Professor Michael J Hefferan
Dr. Pamela Wardner

November 2013
The research findings and report *The Sunshine Coast and South-east Queensland … missing links?* are a copyright of the author as permitted under the *Copyright Act 1968* for their use and application.

No part of this document may be reproduced by any process by any other party without express permission of the author, fair research and citation excepted.

For permission requests, please contact:

Professor Michael J Hefferan  
C/- University of the Sunshine Coast, Sippy Downs, Queensland, Australia  
Telephone: + 61 7 5456 5169 | Mobile: 0414 014 241  
Email: mhefferan@usc.edu.au

*Recommended citation:*

Hefferan, M, Wardner, P. 2013 *The Sunshine Coast and South-east Queensland … missing links?*, report presented to Sunshine Coast Futures Conference, Sippy Downs, Queensland, 8 November 2013.
EXECUTIVE SUMMARY

This is the fourth in a series of research papers that in the past have considered comparative analysis with other Australian regions, the impacts of the demography, and the spatial layout of the region. This paper takes a more comprehensive view of how the region links externally to the balance of South-east Queensland (SEQ) and on from there to a national and global environment.

A time comes for any region, community or individual to ‘reset the compass’. This paper will hold that, for the Sunshine Coast, that time has indeed arrived. In part that is because, post the global financial crisis, the economic signs are finally improving. This region is extraordinarily well placed to capture those new and fundamentally different opportunities. It is now rapidly maturing to become a more sophisticated place with a critical mass in key new ‘trading’ sectors which will promote into a more broadly based economy and community. This needs to protect the special, positive characteristics of the region and at the same time be willing to develop deeper relationships and links across SEQ to become more of a key activity node and ‘destination’ within that area.

An understanding of ‘how we got to this point’ is important to accepting who we are and how we manage the future. The paper provides a brief development history. This is essential in appreciating where we came from but, equally important, the region cannot be inhibited or limited by that past. The Sunshine Coast is often known for its image of beach culture and desirable lifestyle – there is nothing wrong with that. In fact, that notion represents a widely held ‘Australian aspiration’. It is an attribute that be protected and developed. It is purely anecdotal to say that is a detriment to business. As the Gold Coast proved decades ago, the two are complementary in the contemporary environment. It is simply a matter of how this offer is presented and nurtured. Perhaps, it is not the offer that is the problem but the region’s own confidence and what to do from here.

The paper recognises that a vibrant community is not simply about economic growth and external linkages. It would hold however that a prosperous, well-serviced and educated community is a far better place to produce the community that current and future residents demand.

The future will not look like the past. This research will question how regions are defined and with that, the notion of the use and direction of peri-urban space. Further in the complex land use mosaic of SEQ, concepts of and debates over ‘optimum size’ of regions and towns may be of little practical value.
The Sunshine Coast is now poised to very much set its own course as a region presenting a third major node in SEQ and, like in a path not dissimilar to the Gold Coast, to become a destination in its own right. Unlike most of the major regions in SEQ, the Sunshine Coast is not fundamentally a dormitory or commuter zone for Brisbane and is unlikely to become such for the foreseeable future. Therein lies a level of independence and separate identity, whilst having challenges will have particular and unique benefits.

To do that however it must make deliberate choices, provide innovative strategies in economic development and land use strategies. It must do this without being insular, to ensure that it maintains and enhances its existing positive identity. Under that more mature and more sophisticated model, new-targeted linkages need to be established and maintained. Of course, hard infrastructures, such as road, rail and air links, are important but not necessarily in the way we always believed them to be.

New linkages to information and communications technology, financial conduits and to professional networks are also important and are considered in this work.
Contents

Executive Summary ........................................................................................................... iii

Contents ............................................................................................................................. v

List of tables ....................................................................................................................... vi

List of figures ...................................................................................................................... vii

1 Introduction ..................................................................................................................... 1
  1.1 Context and objectives ............................................................................................... 1
  1.2 Parameters and limitations ....................................................................................... 3
  1.3 Key definitions .......................................................................................................... 3

2 Urban and regional trends ............................................................................................... 8
  2.1 The emerging urban and regional order ................................................................... 8
  2.2 Trading and non-trading sectors .............................................................................. 10
  2.3 An optimum size? ................................................................................................... 11
  2.4 Relevance to South-east Queensland ..................................................................... 13

3 Understanding South-east Queensland and its components ......................................... 15
  3.1 Brief history .............................................................................................................. 15
  3.2 South-east Queensland Regional Plan ................................................................. 16
  3.3 Statistical snapshot ................................................................................................. 19
  3.4 Economic plans and programs ............................................................................. 32
  3.5 Regional comparison and interfaces – deductions from statistics ....................... 34

4 Dynamic relationships in SEQ, Brisbane and the Sunshine Coast ............................... 36

5 Missing links and strengthening ties ............................................................................... 38
  5.1 Keeping and further developing identity ................................................................ 39
  5.2 Professionals and networks .................................................................................. 41
  5.3 Education and research ....................................................................................... 42
  5.4 Attracting capital funding .................................................................................... 45
  5.5 Infrastructure links – specifically the National Broadband Network (NBN) ........ 46

6 Conclusion ....................................................................................................................... 49

7 References ....................................................................................................................... 51

Appendix A South-east Queensland regional planning area .............................................. 56
Appendix B SEQ regional components in brief ............................................................... 57

About the authors .............................................................................................................. 68
LIST OF TABLES

Table 1  Estimated resident population by local government area, SEQ Profile Region, 2002, 2007 and 2012r ................................................................. 20

Table 2  Current distribution of SEQ population ................................................................. 23

Table 3  Age groups by region in SEQ .............................................................................. 25

Table 4  Household size and incomes by region in SEQ ...................................................... 26

Table 5  Income ranking of SEQ regions .......................................................................... 27

Table 6  Median mortgage repayments ............................................................................. 28

Table 7  Number of people attending an educational institution by region in SEQ ........ 30

Table 8  Journey to work to Brisbane of key SEQ regions .............................................. 31

Table 9  SEQ Regional Councils’ economic priorities ...................................................... 33
LIST OF FIGURES

Figure 1 Complex causal links between land use and regional economics with other external forces ................................................................. 14

Figure 2 South-east Queensland and its subregions featuring the activity centres .................................................................................. 18

Figure 3 Population growth of key regions in SEQ ................................................................. 22

Figure 4 Residential vacancy rates Sunshine Coast .......................................................... 28

Figure 5 Population share of SEQ regions ........................................................................ 35

Figure 6 Map of Sydney greenbelt areas ............................................................................. 40

Figure 7 Selected education statistics by local government area ...................................... 43
This page intentionally left blank.
Sunshine Coast and South-east Queensland
... missing links?

1 INTRODUCTION

1.1 Context and objectives

Even compared with the impressive history of the balance of South-east Queensland (SEQ), the Sunshine Coast has grown remarkably over the recent decade. It has grown over ten times its size in the lifetime of the baby boomer generation – the largest sector now residing here. Despite disruptions such as the 2008 global financial crisis, that growth and development is likely to continue and compound into the future.

Given wider economic, demographic and other forces described in this paper and impacting on the region, it is most unlikely that this future will simply be an expansion or duplication of times past.

Regional growth and development is unique to each location. In the case of the Sunshine Coast, growth has typically occurred in waves and, in the past, patchy land use patterns emerged driven by a succession of dominant land uses – practically all of which disappeared again as resources were exhausted or markets were lost. Geography was always important in determining those uses. Key components were a narrow strip of coastal (beach) settlements, a rural hinterland with principal activities that changed over time and all punctuated by estuarine creeks and rivers and undevelopable mountain ranges. Historically, the Sunshine Coast’s place in South-east Queensland was based around that frame and image.

This paper would argue that those development parameters are fundamentally changing and a new and quite different urban area is emerging. The region is now reaching a critical mass in population and an economic depth that it has not previously experienced.

A number of sometimes unrelated events have brought the region to this stage. The rapid increase in population and investment, the rise of knowledge-based professional sectors that seek lifestyle with economic opportunity and the growth of education and health sectors are all part of that. This phenomenon is not necessarily causal. It is interesting to note that these events have emerged during the same period as the Queensland local authority amalgamation which
took effect in March 2008 and the demise of the last physically dominant regional land use of sugar production.

This paper holds that the current period represents a critical, progressive change on the Sunshine Coast. The region is now developing as the third major node (‘destination’) in SEQ. This is not in competition to the other SEQ regions whose roles and characteristics have their own degree of differentiation; the evidence will show that the Sunshine Coast change will now follow the growth tangent of the Gold Coast experience over the last four decades. However, instead of the intense tourist focus and high rise development patterns of the Gold Coast, the Sunshine Coast has the opportunity to be more deliberate than opportunistic in producing a unique place – based on the present-day rather than historic concepts of regional economy and communities.

This work examines those changes and how future success will materialise – not simply from the development and management of the Sunshine Coast itself but also from leveraging on the available links to the balance of SEQ and beyond.

The reference to ‘missing links’ in the title reflects various levels of the topic.

The first refers to the physical links such as transport infrastructure, particularly road and rail, between the Sunshine Coast and Brisbane. It also refers to other infrastructure links such as the installation of the National Broadband Network (NBN) and its use as well as access to an airport hub. All these will be building blocks in a new economic order.

The second refers to the social links such as business, professional, and cultural networks. Some activities are only available in large cities such as Brisbane which a rapidly developing and evolving region such as the Sunshine Coast needs to initially interface with to access the depth and range on offer.

Thirdly, and perhaps with a near anthropological approach, a consideration of historic trends is worthwhile. Various component parts of SEQ have, from a single settlement less than 200 years ago, evolved into such diversity, a trend that is continuing at an ever increasing rate.

Finally, the word ‘link’ is important for another reason. ‘Link’ implies a relationship, point of contact and perhaps ‘joining with’. It is however a different concept to that of ‘integration’ or one thing (i.e. a region) being subsumed by another. Almost above everything else, a strong emphasis of this work is the need for the Sunshine Coast to maintain its own identity, character, sense of community, individual economic priorities and aspirations. The emerging change recognised in this work is not towards unification or homogenisation of
SEQ but rather the emergence of a Sunshine Coast region that is much more mature, diverse and contemporary and contributing to and leveraging from Brisbane and the balance of SEQ for the benefit of all.

Investigations here are based on sound data. The information now available for SEQ in general, for Brisbane and the Sunshine Coast is now more reliable to allow statistical profiling. Widely based contemporary literature was identified to generate important geographical and historic backgrounds as well as urban development theory. This included areas on the recent phenomena of city growth, urbanisation and of changing industry composition, business environments, community structure and aspirations and wider regional economic analysis. Only with that comprehensive research platform and statistical base in place, could current and future development trends be accurately observed and likely future issues in regional dynamics and relationships be identified early and addressed.

1.2 Parameters and limitations

This paper focuses on the Sunshine Coast and its context within SEQ. While other regions within SEQ have been investigated, discussion of them has been largely confined to comparison and to illustrate characteristics in dealing with the Sunshine Coast.

The research builds on the three papers in this series:

- Sunshine Coast demographics: More than just the numbers (2011)
- Rethinking Sunshine Coast villages (2012)

At the time of this writing, Noosa is preparing to de-amalgamate from the Sunshine Coast Council and will again operate as a separate council by January 2014. For the purposes of discussion in this paper however, the Sunshine Coast region definition is taken as the entire area of the former Caloundra, Maroochydore and Noosa shires for practical statistical purposes.

1.3 Key definitions

In Australia, a range of circumstances seem to contrive against the study of regions and regional development. The country has excellent capture of
economic, demographic and other data. However, in finer-grained (regional) analysis, the statistical boundaries vary depending on use (e.g. postcodes, political/electoral, geographic, government service delivery areas, weather maps) and they rarely coincide, making both research and comparison difficult. Further, industry sectoral definitions do not, and indeed can never, show the intricate interrelation in many activities – tourism and ‘knowledge-based’ businesses are two cases in point of particular relevance to the Sunshine Coast. Likewise, given the porous trading boundaries of regions, agreed definition and close measurement of gross regional product (GRP) will always be difficult.

It is a quirk of statistics and almost ironic that, whilst the aggregate statistics at a national and state level have a high degree of accuracy, the component (regional) parts that contribute to that aggregate often do not have the same level of definition or accuracy.

These observations are not a criticism of the Australian Bureau of Statistics (ABS) or any other agency or statistical model. Statistics attempt to make sense of and identify trends in very complex systems but can never fully explain them. Trend data presumes consistency over time and the ABS cannot simply shift the base or change definitions year-to-year.

These inherent limitations must be considered in any regional analysis or comparisons such as this work. As long as a consistent base and methodology is adopted, the assessment of change and trends and their accurate comparisons may be seen as important as the achieved quantum reported.

In the study of regions, even an agreed definition of what constitutes ‘a region’, ‘a town’, ‘a city’ and ‘peri-urban’ are not without debate and alternate views.

1.3.1 Regions

In Australia, and in line with the approach taken by the Federal Government’s Regional Development Australia (RDA), 55 regions have been identified in its national network (RDA 2013). In effect, they are significant areas of land often with one central place or capital and with a considerable community of interest (often based on types of economic production) and reasonably able to be identified or at least bounded by succinct geography.

More specifically, a region has been defined as a cohesive unit, incorporating a town(s), communities and neighbourhoods, in which the economic, social and ecological processes and resources are available and work together in an
integrated fashion to meet the expectations of business, residents and visitors (Calthorpe & Fulton 2001, Foley & Senior 2008, Stimson et al. 2006).

Over recent years, regions have become a significant focus of economic growth in the global market place (Stimson et al. 2006). It would be argued that the principles of macroeconomics – analysis based on aggregate and national level policy over post-war years – has probably hidden and not appropriately recognised that the nation’s economic activity, productivity and output is, in fact, the sum of those quite different and unique regions (Barnes & Ledebuer 1998). Despite the advances in telecommunications technology, the ability to network, in person, with specialised businesses and people is still important (Leer, 2000). Regional scale provides the access to the networks necessary to successfully compete globally (Calthorpe & Fulton 2001). That also explains the local-to-global character of many contemporary regional clusters which will carry out business and trading with little regard to traditional town, city or national hierarchies.

The definition and the use of the word ‘region’ falls down when one considers an area such as South-east Queensland (SEQ). The Australian Statistical Geography Standard (ASGS) classifies SEQ as ‘Natural Resource Management Region’ boundary area. SEQ is commonly referred as a ‘region’ but is in fact made up of two cities and nine regional council areas. These areas are (listed according to population size):

1. Brisbane City
2. Gold Coast City
3. Moreton Bay Regional Council
4. Sunshine Coast Regional Council
5. Logan Regional Council
6. Redland Regional Council
7. Ipswich Regional Council
8. Toowoomba (part of)
9. Scenic Rim Regional Council
10. Lockyer Valley Regional Council
11. Somerset Regional Council

This is not simply a matter of semantics. SEQ is important as a political, geographic and, to some extent, economic aggregation. However, its grouping of a considerable number of distinct and different areas fails to meet the basic concept of what constitutes a region.
1.3.2 Cities

To appreciate the spatial development and change in urban development, a better delineation of the terms ‘city’ and ‘peri-urban’ is also required – the former being relatively easy; the second, however, being less clear both in literature and the manner in which contemporary regions are expanding and developing.

A city is a relatively large aggregation of people and with that, the permanency provided by a physical place where social, business and cultural networks are created. Its space reflects the universality of the urban experience – despite the vast differences in climate and location, there is a human need to aggregate into particular locations – for defence, trade, and governance, spiritual and cultural reasons (Kotkin 2006). Cities (as opposed to ‘towns’) are places that have aggregated in size and economy to be in a dominant position – either relative to their surroundings and catchments or to have reached a status and trading ability with those outside that physical immediacy (Glaeser 2011, Reader 2004). Scale therefore is obviously important, as reflected in the recent, dramatic appearance of mega-cities scattered across the globe (Brugmann 2009).

Time is another key parameter that must be considered. Cities and other urban areas are dynamic, not static and their future is determined by a range of positive or negative influences, not necessarily related to their current scale or function (Short 1996, Wardner 2013). This is contrary to rises and falls that can occur over remarkably short time periods, responding in the prevailing environment to both economic change and resultant population shifts.

A final observation regarding the present-day definition of cities and other urban areas relates to the facilitating role of information and communicate technology (ICT). It might be held that improved communication and the installation of new platforms such as, in Australia, the National Broadband Network (NBN) will challenge the role, dominance and even the definition of cities. In practice the opposite is probably true and improved ICT, even when provided across regions or the entire country, disproportionately favours existing, concentrated nodes (Horan 2000). These existing centres, because of their current scale and infrastructure, will almost invariably secure new technology first, and at higher quality/volume and often at a cheaper overall rate. They will be the early adaptors, innovators and will often be in clusters, providing concentrated application of these new facilities. Typically too, by the time this wave of ICT change becomes available to other parts, a new wave will be in the process of introduction – again first to the principal node. In this way ICT, in fact, adds to the comparative advantage of primary activity centres such as Brisbane, not dilutes it.
1.3.3 Peri-urban

The concept of ‘peri-urban’ is not as easy to define – and perhaps that is expected given that, even geographically, all cases are inherently different. ‘Peri-urban’ has been traditionally seen as those fringe areas surrounding a large population centre. They are typically areas in transition as the forces of a major city change and expand (Houston 2005). Such a definition may, however, be fairly limiting – apparently identifying outer suburbs, typical acreage developments including en globo or accommodation lands that are slightly beyond the current perimeter of a city’s development.

Therefore contemporary regions and their development is simply not that straightforward. Often, as in the case of SEQ, there are a number of existing and emerging activity nodes, interacting and creating a much more intricate and dynamic environment than a steady, lineal development pattern pushing out from a single point. Ravetz et al. (2013) define peri-urban more accurately: Peri-urban areas are not just the fringe areas in-between cities and countryside but a new multi-functional territory characterised (at that point in time) by a lower population density where growth is anticipated as new nodes emerge and grow. This definition better reflects many contemporary regions and their development in places such as SEQ.

An alternative view however is to see ‘regions’ as not particularly defined closely by geography nor political boundaries but rather as functional ‘economic areas’ – ‘sunbelts’ ‘tourist regions’, major ‘ICT clusters’, etc. (Barnes & Ledeuber 1988). Each such area may well have urban concentrations (or sometimes called specialist areas) scattered across them which expand and contract based on a range of individual factors. Surrounding these nodes is what is described as ‘economic commons’ where development is influenced by a number of nearby nodes or activity centres, not just from the traditional dominant city. This seems to be a much more realistic and logical approach than the traditional peri-urban ‘fringe land’ model described earlier.
2 URBAN AND REGIONAL TRENDS

The increased dominance of cities is recognised globally with mega-trends towards urbanisation. This phenomenon impacts urban form and the function of cities as well as investment, social fabric and the nature of business. Even if the forces underlying such trends may well be reasonably consistent over time, the physical manifestations of those changes are anything but uniform. Today’s successful regions are vastly different in terms of scale, specialities and products to those of the past. Further, communications and linkages with other regional, national and global nodes and the manner and level of impact on their wider region and peri-urban (‘economic commons’) are also quite different.

These observations pose a range of questions for urban researchers, particularly the causes for the spatial and physical variations and how these new forms of regional urbanism will continue to evolve. As noted earlier, it raises the question of whether traditional concepts and definitions of ‘peri-urban’ are still really relevant across rapidly changing, wider regions where multiple activity nodes are emerging. Furthermore, it questions whether the previously definable benchmark of ‘optimum size’ for an urban area or region remains applicable and useful. Growth is an abstract term which, of itself and in any context, is neither good nor bad. In the physical context of a particular urban or region however, it is important to establish whether the determination of an optimum future size is of value or even relevant.

2.1 The emerging urban and regional order

As observed above, towns and cities exist for a range of economic, social, cultural, governance and defence reasons. Those underlying motivations to ‘group’ or ‘cluster’ have changed little since antiquity and, in that basic raw form, fail to explain the dramatic changes to the urban frame that has occurred across most Organisation for Economic Cooperation and Development (OECD) countries over the past two decades.

What has changed is the rapid advancement of urban-based economic activity with higher levels of sophistication, technology take-up and the generation of wealth in metropolitan areas. The drivers of these increasingly urban-based businesses and communities were competition, the rise of science and innovation, the protection of property rights, advances in health and medicine, consumerism, the emergence of dominant ‘work ethic’ philosophies and, with that, the rise of entrepreneurship (Ferguson 2011). Such advances and activities are typically those disproportionately generated within cities (Glaeser 2011).
A range of authors have contemplated these recent dramatic events and arrived at fairly consistent conclusions.

In the first instance, the fundamental natures of the changes underway are recognised. Ferguson (2013), Ruppert (2009) and Saul (2009) all recognise that it is perhaps too easy to characterise challenges and changes simply in terms of economics or in the use of resources, sustainability or the role of instantaneous communication. Certainly all of these are important, but the nature of the current change appears to represent a fundamental shift – in institutions, in legislation and governance, and in social structures.

Regional growth, its spatial layout and environmental sustainability focus are functions of wealth, wealth creation and wealth aggregation (Polèse 2009). This has led to the emergence of strong forces of agglomeration – scale in production, cost of transportation and logistics, the need for proximity, the advantages of diversity (which is more likely in large populations), the quest for identity and a central place. Additionally, the need for information sharing and social interaction results in clustering – characteristics more likely associated with larger urban places. This dichotomy gives rise to those places that exhibit all those attributes which further encourage others to build quickly upon them, increasingly leaving behind those that ignore that need and leaving little or no opportunity to recover that disparity.

Spatially however it cannot be expected that every person can occupy the optimum place within those new, large urban nodes. Rapid densification would typically occur in those areas (often inner city) and accommodation usually becomes scare and expensive. Polèse notes however, that the resultant urban form will not necessarily produce a concentric growth model. It most likely will be broken and distorted by corridors of efficient transportation; and other areas which have other comparative advantage but remain within a convenient commute from that central node which provides those facilities, services and employment. None of this implies that income differentials occur by chance. US studies consider that the deep seated economic divergence between regions – the ‘have’ and ‘have not’ – have never been so stark and represent the most significant change in that country’s spatial layout and economy (Moretti 2013). Moretti believes that the divide is no longer primarily geographic or racial but is now based on education, the foundation of the new economy. With that dramatic division in place, the income and economic effects cascade through to effect cultural identity, health, family stability and even politics. Critically here, as will be discussed in Section 2.2 following, education-based wealth concentrated in a particular region leads to demand for other services as well. The multiplier effect generates wealth and prosperity for the whole of the region.
All of this is anything but random, chaotic or unpredictable – jobs flow to where knowledge is and knowledge is underpinned by education.

Apart from the education driver, it is often difficult in urban and regional development to identify what is ‘cause’ and what is ‘effect’. In most cases, various characteristics probably feed off each other and result in particular growth and development. The fusion of culture, creativity and innovation as interacting forces often is spurred by education and place (Florida 2005).

Glaeser (2011), Kotkin (2006) and Brugmann (2009) all recognise the importance of the built form and spatial layout. It facilitates change, and how rapidly such change can occur provided that the building blocks of an aspirational and highly liveable location exist. In this too, it is easy to underestimate the ability of existing built assets to renovate and adapt to changing demands. The perception of ‘unchanging’, ‘brick and mortar’ does not reflect reality with individual assets and precincts that continually evolve and transform (Brand 1995). The nature and function of uses of the Brisbane central business district (CBD) and South Bank area over the past two decades represent an excellent case study of such evolution in the face of changing demand.

2.2 Trading and non-trading sectors

Regional economies and communities are complex and diverse and there are numerous ways by which they communicate and interact both internally and out to neighbouring regions. A number of these are simply social and family relationships; others are based on business transactions, while others are institutional in nature. The mediums of communications vary. The rise in electronic communication enhances speed and feedback between parties and the increased use of social media has created new links even without the benefit of any physical connection. However, in spite of all that, there is no doubt that face-to-face communication remains important and that geographic proximity remains vital.

If business and economic links are to be built, where then is the best place to start?

The traditional approach would be to consider supply chains in specific sectors. In the case of the Sunshine Coast however an alternative view may be more relevant given the lack of ‘supply chain’ type sectors.

This argument would hold that rather than considering a larger number of sectors, each with individual development strategies, it is more appropriate to
consider the regional economy as involving only two components – one the ‘trading sector’, the second the ‘non-trading sector’. The trading sector is that part of the region that trades with and earns income from principally outside the region’s boundaries.

That can simply be to the adjoining region, nationally or internationally. In a healthy economy those activities may well be 25% or more of gross regional product. The balance of jobs (typically made up of the ‘service sector’) is found in areas where income is derived from sales and activity within that region.

This is a very important distinction. The key productivity gains and innovation and with that wealth creation generally comes from the trading sector. Today, many of those are knowledge-based, but they also extend to high end manufacture, professional services and considerable parts of the education and health sector. Even those who travel to other regions for work may well be considered as part of that ‘trading sector’ – given that they are in effect ‘exporting’ their skills and talents. Activities here require a high level of education and skill and are the real wealth generators for the community.

The non-trading sector is vitally important, but those jobs are typically based on rate per hour services where innovation and higher levels of productivity are very difficult to improve. The upshot of all of this is a somewhat ironical situation where the ‘drive, productivity and new money’ into an economy enters through the trading sector but the bulk of the new jobs exist in the service sector. Without the ‘go forward’ of the former, the latter languishes. Detailed research (Morelli 2013) establishes that for every job created in the trading sector four to five jobs eventually emerge in the non-trading sector.

For the purpose of this research, the conclusions are clear – priority must be given to support and exposure in the first instance to linking that trading sector with other regions in a targeted, focused way.

In the case of the Sunshine Coast that may include trade missions as close as to Brisbane but may also extend further afield.

**2.3 An optimum size?**

As areas such as SEQ and their nodes evolve, the question of whether there is an optimum size is important to ensure their efficiency, liveability and functionality. The concept of optimality, which is the relationship between marginal costs and marginal revenue are well known in economics, but whether such neat theories can be applied to contemporary urban development is problematic.
Despite a century of investigation, a real understanding of the evolution of the urban areas and how (and if) they reach some predetermined optimum size remains quite inadequate (Batty 2008). Built forms cannot be seen simply as static or unchanging, rather it is important to consider cities and their development (including that of their surrounding areas) as dynamic and complex systems. They grow, decline and transform themselves based on a range of economic imperatives and also on a range of community, lifestyle, environmental and other parameters. This is made even more complex given that these nodes are linked to their surrounding geography and are interconnected globally through instantaneous communication, using the same platforms for business and social contacts alike (Mitchell 2003).

Concepts of trade-offs are important here as businesses and individuals weigh up the typical urban advantages of trade, information sharing, innovation and business support (Brugmann 2009) with higher costs, congestion, pollution, crime levels and so forth. These are complex, diverse and often subjective location decisions further complicated by the continual ebb and flow of people, capital, legislation, ideas and changes in institutional forms and business structures (Alonso 1971).

Consequentially, the idea that cities have a tendency to grow to some optimum size and then plateau seems illusionary. The enormous variations in size of cities across the world or even in a single country provide proof of that. Huge variations in land value and property prices across the regions that have little or no relationship to land use capacity would also testify to non-economic determinants also being involved.

Yet another dimension to this is the much less locationally specific nature of contemporary industry and commerce. Fast moving sectors that are generating new, concentrated urban environments across OECD countries typically involve value-adding knowledge, education, innovation, entrepreneurship and clustering of like-minded talents. This is quite different to the traditional heavy manufactured goods of past eras which demanded specific locations and larger scale operations (Florida 2002, Moretti 2013). Rapidly developing physical clusters can therefore emerge in unexpected geographical locations, further distorting regular or anticipated urban expansion. SEQ, with its unique geographic characteristics, historic settlement patterns and disjointed land uses, use capacity and development densities, presents an excellent example of much of this theory.

The literature suggests that the agglomeration of economic activity in one place typically has spill-over effects in wealth creation, amenity and lifestyle, and there certainly comes a point where those urban benefits begin to be eroded by
congestion, high rents, environmental damage and so forth (Capello 2013). Consequently, whilst the underlying forces are quite consistent across Australia and internationally, the growth, economic, social, governance, history and existing built form is such that outcomes will be vastly different.

Capello (2013) recognised that level of city specialisation, its history, whether it carries out higher order or lower order functions, its geography and the level of interaction with other nodes, all determine the likely size for a particular city at some point in time. The SEQ case study reflects these observations. In the first instance, whilst Brisbane itself is undoubtedly the dominant urban and economic force in SEQ, its ability to grow and develop is quite limited, based on geographic constraints. Infrastructure improvement is also difficult and expensive in high density areas, as available, well-located property is now within a physically constrained city and near city area.

Meanwhile, the nodes to the north and south – the Gold Coast and the Sunshine Coast – have experienced larger population increases and rapid physical expansion. All of these observations challenge the concept of orderly outward expansion and, with that, an eventual growth out from a single point with some measurable optimum final size in mind.

2.4 Relevance to South-east Queensland

Regions and cities are complex systems. Planning for their resilience and long-term growth requires a balanced perspective. From the previous discussions, there are numerous contributors to regional economic performance and prosperity. Kim (2011) provides a base diagram which the authors have adapted and enhanced to illustrate these complex dynamics. These are found in Figure 1 below.
In summary, there are strong causal links between land use planning and regulation to regional economic performance and prosperity. The interdependence of the markets affecting one another is largely influenced by land use planning and regulation. Within that context are the higher aspirational issues such as sustainability and resilience issues built into every aspect. All these however are affected by systemic issues such as advances in information and communications technology, medical breakthroughs to allow us to live longer and healthier, State and Federal politics that determine infrastructure and social funding, effects of education and higher education and international policies and globalisation.
3 UNDERSTANDING SOUTH-EAST QUEENSLAND AND ITS COMPONENTS

3.1 Brief history

Like the rest of Australia, SEQ’s history is a recent one with the first settlement occurring (in Brisbane) less than 200 years ago and with the State becoming self-governing some 150 years ago. Based on its commencement, Brisbane dominated the State as its government and administrative headquarters, transportation hub and principal port were located in the city. Education, health and the aggregation of business followed – an example of cumulative causation, identified in many countries (Polèse 2009) but particularly relevant to practically all Australian cities and states.

Even from the earliest times, geography played a critical role in development patterns in SEQ. Growth typically followed the narrow flood plain of the Brisbane River, running generally towards the south-west and coastal plains to the north and south thus creating the elongated star-shaped development defined by Moreton Bay to the east and undevelopable ranges to the west. Infrastructure followed those directions and, reinforced by statutory planning, created a low density urban sprawl for a 200 kilometre narrow coastal strip from the New South Wales’ border through to Noosa at the northern extremity of the Sunshine Coast (Spearritt 2009).

In the first half of the 20th century, urban development took on a fairly predictable pattern, developing out in concentric retail, commercial, industrial and then dormitory rings from the Brisbane CBD. Over the past 30 to 40 years, however, quite different forces and patterns have emerged which fundamentally changed the nature of regional development in Australia. A catalyst to this, not only for SEQ but, indeed, for the whole of Australia, was the development of the Gold Coast as a whole new urban model approximately 80 kilometres south of the Brisbane CBD.

Unlike any other previous urban area in Australia, the Gold Coast was not based on historical settlement patterns, but rather on lifestyle and a single industry – tourism that primarily focused on international markets. Infrastructure was largely funded by the Japanese, and capital investment through the 1970s and '80s reinforced that trend. It produced a city in its own right from what was a string of small beachside villages of 29,000 people in 1954 (Spearritt 2009) to more than half a million people (ABS 2011) and with consistently the highest growth rates in the country (Salt 2004). Even the urban form it adopted – of
strip, high-rises along the beachfront – reflected international (e.g. United States) rather than Australian vernacular design.

From that scale, transport, education and health infrastructure developed, thereby facilitating future growth. Distinctly noted here is the progressive contemporary culture that emanated in the Gold Coast. The fast growth of its population largely derived from interstate and overseas migration promotes an entrepreneurial ethos not experienced elsewhere in Australia. On the base of that, new regional dynamics and relationships were established.

This paper contends that there are fairly consistent drivers and themes to contemporary urban development, and the manner in which that happens and the final, evolving urban forms are unique to each situation. Some regional areas provide valuable insights as to how contemporary urban areas grow and develop in response to a range of geographic, economic, demographic and political forces. The south-east region in Queensland and within that, this Sunshine Coast region, provides one such example.

### 3.2 South-east Queensland Regional Plan

The rapid growth in SEQ, particularly in the early 2000s, found the Queensland Government setting an urban growth boundary in 2005. It was communicated through its initial publication of the *South-east Queensland Regional Plan (SEQRP) 2005–2026* and has been updated and superseded with the *SEQRP 2009–2031*.

The SEQRP provides the regional land use patterns defined by the desired regional outcomes. In this way, development and growth can be directed within the urban footprint and infrastructure spending will be coordinated and provided in a timely manner (Department of Infrastructure and Planning 2009). The *SEQRP 2009–2031* is supported with the *South-east Queensland Infrastructure Plan and Program (SEQIPP) 2010–2031* providing the route of trunk infrastructure.

One of the features of the SEQRP is the introduction of ‘activity centres’ which are to be developed in such a way as to ‘focus employment, infill housing and community services in well-planned, vibrant and accessible regional activity centres and along high-frequency transit corridors’ (Department of Infrastructure and Planning 2009, p. 96).
The SEQRP introduced a six-tiered network of activity centres:

- **Primary activity centre** – Brisbane Central Business District which included activities of state-wide functions and influences.

- **Principal activity centre (PAC)** – These areas serve catchments of significant regional significance and accommodate key employment concentrations.

- **Major activity centre (MAC)** – These centres complement the PAC by serving catchments of sub-regional significance and accommodating key employment concentrations but would have reduced status as areas of government investment particularly those not serviced by public transport.

- **Specialist activity centres** – These centres are destination centres and are recognised for the number of trips generated by the activity node. An example would be the Gold Coast University Hospital precinct and the Boggo Road/Buranda areas.

- **Principal rural activity centre** – These centres serve as community hubs in rural areas. They support a sub-regional rural catchment and contain concentrated rural services, as well as commercial, retail, government and community activities.

- **Major rural activity centre** – Similar to MAC above, these centres complement the Principal rural activity centres.

These are marked on the SEQ map in Figure 2. The urban growth boundary is coloured pink where these activity centres can also be found.
Figure 2 South-east Queensland and its subregions featuring the activity centres

Source: Department of Infrastructure and Planning (2009, p. 98)
3.3 Statistical snapshot

A critical starting point of analysis is a firm evidence base when investigating anecdotal ideas. This often reveals some of them being confirmed, others added to and on occasion, surprising contradictions emerge. The purpose of this section is to provide that statistical base for SEQ and its regions in three key demographic areas – population and age distribution, education and household wealth. From these databases, relative conclusions can be derived about the regions.

SEQ is designated as a regional planning area with a total of 22,887.7 square kilometres including the capital of the State of Queensland, Brisbane (OESR 2013a). It contains a little over three million people – about 75% of the entire State, even though its land area is only 1.3% of the State in total (OESR 2013a).

It is one of the fastest growing areas in Australia. That growth however is far from uniform – Brisbane city, together with the ten other local authority areas (Gold Coast, Ipswich, Lockyer Valley, Logan City, Moreton Bay, part of Toowoomba, Redland City, Scenic Rim, Somerset and the Sunshine Coast) make up SEQ. All have quite different characters, economies, demographic profiles and growth projections.

On that basis, investigation of the region, and specifically the relationship between two of them – Brisbane city and the Sunshine Coast region, a hundred kilometres north of the capital, makes for interesting analysis as to how comparable global trends and forces can manifest themselves quite differently, even within the same country or greater region.

3.3.1 Population growth

As mentioned earlier, the growth tangent of the Sunshine Coast is likely to be similar to the Gold Coast primarily because of the very high growth in population levels. However, the perception of this fast growth is not as real as we think.

Looking at the estimated resident population by local government area presented in Table 1 below, the average growth per annum of some regions is relatively higher than the SEQ average. These findings are:

- Over the past ten years, the regions that have surpassed SEQ average are (according to average annual growth rate): Ipswich, Moreton Bay, Gold Coast and the Sunshine Coast.
• However, over the more recent past five years, there is a shift in the growth trend cited above. Other regions such as Lockyer Valley and Somerset have now grown above the SEQ average. While Ipswich, Moreton Bay, and Gold Coast have maintained their above average growth rate. Here we note, the slowing down of the population growth in the Sunshine Coast.

• Over the past ten years however, the share of the SEQ region is still increasing in proportion to the rest of the State’s growth.

Table 1  Estimated resident population by local government area, SEQ Profile Region, 2002, 2007 and 2012r

Source: OESR 2013b

<table>
<thead>
<tr>
<th>Local government area</th>
<th>Estimated resident population (ERP) as of 30 June</th>
<th>Average annual growth rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brisbane (C)</td>
<td>908,289</td>
<td>1,010,222</td>
</tr>
<tr>
<td>Gold Coast (C)</td>
<td>394,631</td>
<td>466,940</td>
</tr>
<tr>
<td>Moreton Bay (R)</td>
<td>291,543</td>
<td>344,545</td>
</tr>
<tr>
<td>Sunshine Coast (R)</td>
<td>250,665</td>
<td>291,904</td>
</tr>
<tr>
<td>Logan (C)</td>
<td>239,515</td>
<td>264,410</td>
</tr>
<tr>
<td>Redland (C)</td>
<td>118,870</td>
<td>133,596</td>
</tr>
<tr>
<td>Ipswich (C)</td>
<td>126,116</td>
<td>148,133</td>
</tr>
<tr>
<td>Toowoomba (R)</td>
<td>136,619</td>
<td>147,927</td>
</tr>
<tr>
<td>Lockyer Valley (R)</td>
<td>28,813</td>
<td>32,050</td>
</tr>
<tr>
<td>Scenic Rim (R)</td>
<td>30,715</td>
<td>34,983</td>
</tr>
<tr>
<td>Somerset (R)</td>
<td>18,117</td>
<td>19,919</td>
</tr>
<tr>
<td>SEQ Profile Region</td>
<td>2,543,893</td>
<td>2,894,629</td>
</tr>
<tr>
<td>Queensland</td>
<td>3,653,123</td>
<td>4,111,018</td>
</tr>
</tbody>
</table>

SEQ Region as % of Queensland 69.64% 70.41% 70.79%

* growth percentages in red/bold shows higher than average growth than SEQ average

Note: The estimated resident population (ERP) figure is the official population estimate published by the ABS, and represents the best possible estimate of the resident population. Other figures provided in this study may refer to census data, which is slightly different as Census count by place of enumeration is a count of every person based on where they are located on Census night.

While Table 1 above shows the most recent ten years, a different picture emerges when tracking population growth in SEQ and its former shires over the past 60 years. Spearritt (2009) documented the population levels since 1954.
which includes the populations of the former shires that make up the regional councils that we know today. Figure 3 below provides that historic growth trend. The most significant finding here is the growth rate over the past six decades:

- Brisbane 1.2 times
- Ipswich 2.6 times
- Sunshine Coast 9.1 times
- Moreton Bay 13.8 times
- Gold Coast 17.1 times
- Redland 19.7 times.
Notable here is Logan’s population only registering a population in 1976 and from that time on would have grown over the past 36 years 31.6 times. This is evidence of the outward growth pressure from the Brisbane suburbs into
adjoining, more reasonably priced regional areas. Over this period, SEQ as a whole would have grown 3.6 times its original size from 1954.

3.3.2 Age distribution

The age distribution of any population provides an idea of the vibe generated in an area. It also determines the levels of services required from childcare, educational institutions, medical services through to aged care facilities. Dependency ratios will also assist in the amount of support needed from both the community and government to both children and the elderly. There are numerous conclusions that can be derived from age distribution but for the purposes of this study, it is to provide an overview of the SEQ population.

Table 3 in the following page provides the 2011 census data information of the age profile of each region. While the difference of census data and estimated resident population (ERP) may slightly vary, the figures were taken consistently across the region. Appendix B also provides the base census data for each region to ensure that there is no overlap in counting.

Table 2 below presents the region in terms of population size and percentage of population to total. It shows that the largest is Brisbane with more than 34% of the total SEQ population while the smallest is Somerset representing only 2% of Brisbane’s size.

Table 2 Current distribution of SEQ population

Source: ABS Census 2011

<table>
<thead>
<tr>
<th>Region/ Age groups</th>
<th>Total % to SEQ total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brisbane</td>
<td>1,041,839 34.3%</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>494,501 16.3%</td>
</tr>
<tr>
<td>Moreton Bay</td>
<td>378,046 12.4%</td>
</tr>
<tr>
<td>Sunshine Coast</td>
<td>306,909 10.1%</td>
</tr>
<tr>
<td>Logan</td>
<td>278,050 9.2%</td>
</tr>
<tr>
<td>Redland</td>
<td>138,666 4.6%</td>
</tr>
<tr>
<td>Ipswich</td>
<td>166,904 5.5%</td>
</tr>
<tr>
<td>Toowoomba</td>
<td>140,221 4.6%</td>
</tr>
<tr>
<td>Scenic Rim</td>
<td>36,456 1.2%</td>
</tr>
<tr>
<td>Lockyer Valley</td>
<td>34,954 1.2%</td>
</tr>
<tr>
<td>Somerset</td>
<td>21,639 0.7%</td>
</tr>
<tr>
<td>SEQ</td>
<td>3,038,185 100.0%</td>
</tr>
</tbody>
</table>
The highest age group in each region was highlighted in Table 3 to provide a snapshot of the make-up of that population. To assist the demographic analysis, the generalised characteristics of the generations provided by Meister and Willyerd (2010) were used. The findings on age distribution are as follows:

- The largest demographic groups in Logan, Ipswich, Toowoomba and Lockyer Valley are from the 5–14 year old range. Children are most likely to be in either primary or secondary school. The dependency ratios in these areas are hence relatively high. As this generation matures, they are expected to be most mobile, will be media savvy as they have started their life online in pre-school and will be reading books on e-readers.

- Brisbane has remained attractive to Gen Y (born between 1980 and 1995/2000 depending on the source). These are those in the 25–34 year old age group. They are young adults who are most likely working full time or part time. They are characterised for their inclination for community service, cyber literacy, tolerance, diversity and confidence. They see work as ‘part of life’. It is not surprising to find them mostly in Brisbane where the variety of culture and entertainment is available and where sophisticated technology readily abounds.

- Gold Coast and Moreton Bay are dominated by Generation X. These are those from the 35–44 year old age group. They are most likely young families with young children. They are characterised for their eclecticism, self-reliance, free agents, work/life balance and independence.

- Meanwhile, the Sunshine Coast, Redland and Scenic Rim’s largest age groups are the ‘baby boomers’. These are those from the 45–54 year olds – for the definition of baby boomers, they represent the younger set of this cohort. While they may be relatively successful, they have chosen to live in these areas for the lifestyle. They are often characterised as competitive, sandwiched generation, hardworking and can work long hours.

- Overall, the SEQ region is largely middle aged with the largest age group around the 35–44 years old.
# Table 3 Age groups by region in SEQ

<table>
<thead>
<tr>
<th>Region/ Age groups</th>
<th>Brisbane</th>
<th>% to total</th>
<th>Gold Coast</th>
<th>% to total</th>
<th>Moreton Bay</th>
<th>% to total</th>
<th>Sunshine Coast</th>
<th>% to total</th>
<th>Logan</th>
<th>% to total</th>
<th>Redland</th>
<th>% to total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-4 years</td>
<td>65,840</td>
<td>6.3%</td>
<td>31,081</td>
<td>6.3%</td>
<td>28,199</td>
<td>7.5%</td>
<td>17,747</td>
<td>5.8%</td>
<td>22,692</td>
<td>8.2%</td>
<td>8,622</td>
<td>6.2%</td>
</tr>
<tr>
<td>5-14 years</td>
<td>119,924</td>
<td>11.5%</td>
<td>60,650</td>
<td>12.3%</td>
<td>54,760</td>
<td>14.5%</td>
<td>40,331</td>
<td>13.1%</td>
<td>41,937</td>
<td>15.1%</td>
<td>19,191</td>
<td>13.8%</td>
</tr>
<tr>
<td>15-24 years</td>
<td>159,445</td>
<td>15.3%</td>
<td>66,473</td>
<td>13.4%</td>
<td>49,223</td>
<td>13.0%</td>
<td>34,288</td>
<td>11.2%</td>
<td>41,213</td>
<td>14.8%</td>
<td>18,317</td>
<td>13.2%</td>
</tr>
<tr>
<td>25-34 years</td>
<td>176,162</td>
<td>16.9%</td>
<td>68,437</td>
<td>13.8%</td>
<td>45,748</td>
<td>12.1%</td>
<td>30,476</td>
<td>9.9%</td>
<td>38,865</td>
<td>14.0%</td>
<td>14,661</td>
<td>10.6%</td>
</tr>
<tr>
<td>35-44 years</td>
<td>158,375</td>
<td>15.2%</td>
<td>72,023</td>
<td>14.6%</td>
<td>55,774</td>
<td>14.8%</td>
<td>42,042</td>
<td>13.7%</td>
<td>39,957</td>
<td>14.4%</td>
<td>17,944</td>
<td>12.9%</td>
</tr>
<tr>
<td>45-54 years</td>
<td>134,780</td>
<td>12.9%</td>
<td>66,557</td>
<td>13.5%</td>
<td>50,993</td>
<td>13.5%</td>
<td>44,659</td>
<td>14.6%</td>
<td>36,527</td>
<td>11.0%</td>
<td>6,252</td>
<td>4.5%</td>
</tr>
<tr>
<td>55-64 years</td>
<td>106,164</td>
<td>10.2%</td>
<td>57,921</td>
<td>11.7%</td>
<td>44,246</td>
<td>11.7%</td>
<td>41,539</td>
<td>13.5%</td>
<td>30,561</td>
<td>11.0%</td>
<td>19,744</td>
<td>12.9%</td>
</tr>
<tr>
<td>65-74 years</td>
<td>62,786</td>
<td>6.0%</td>
<td>39,720</td>
<td>8.0%</td>
<td>28,786</td>
<td>7.6%</td>
<td>31,090</td>
<td>10.1%</td>
<td>16,626</td>
<td>6.0%</td>
<td>11,111</td>
<td>8.0%</td>
</tr>
<tr>
<td>75-84 years</td>
<td>39,676</td>
<td>3.8%</td>
<td>22,340</td>
<td>4.5%</td>
<td>14,739</td>
<td>3.9%</td>
<td>17,706</td>
<td>5.8%</td>
<td>7,173</td>
<td>2.6%</td>
<td>6,252</td>
<td>4.5%</td>
</tr>
<tr>
<td>85 years and over</td>
<td>18,690</td>
<td>1.8%</td>
<td>9,300</td>
<td>1.9%</td>
<td>5,578</td>
<td>1.5%</td>
<td>7,030</td>
<td>2.3%</td>
<td>2,500</td>
<td>0.9%</td>
<td>2,715</td>
<td>2.0%</td>
</tr>
<tr>
<td>Total</td>
<td>1,041,839</td>
<td>100.0%</td>
<td>494,501</td>
<td>100.0%</td>
<td>378,046</td>
<td>100.0%</td>
<td>306,909</td>
<td>100.0%</td>
<td>278,050</td>
<td>100.0%</td>
<td>138,666</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region/ Age groups</th>
<th>Ipswich</th>
<th>% to total</th>
<th>Toowoomba</th>
<th>% to total</th>
<th>Scenic Rim</th>
<th>% to total</th>
<th>Lockyer Valley</th>
<th>% to total</th>
<th>Somerset</th>
<th>% to total</th>
<th>SEQ</th>
<th>% to total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-4 years</td>
<td>14,552</td>
<td>8.7%</td>
<td>10,176</td>
<td>7.3%</td>
<td>2,307</td>
<td>6.3%</td>
<td>2,428</td>
<td>6.9%</td>
<td>1,450</td>
<td>6.7%</td>
<td>205,094</td>
<td>6.8%</td>
</tr>
<tr>
<td>5-14 years</td>
<td>25,275</td>
<td>15.1%</td>
<td>19,961</td>
<td>14.2%</td>
<td>5,213</td>
<td>14.3%</td>
<td>5,296</td>
<td>15.2%</td>
<td>3,126</td>
<td>14.4%</td>
<td>395,663</td>
<td>13.0%</td>
</tr>
<tr>
<td>15-24 years</td>
<td>24,712</td>
<td>14.8%</td>
<td>19,890</td>
<td>14.2%</td>
<td>3,864</td>
<td>10.6%</td>
<td>4,771</td>
<td>13.6%</td>
<td>2,274</td>
<td>10.5%</td>
<td>424,469</td>
<td>14.0%</td>
</tr>
<tr>
<td>25-34 years</td>
<td>24,954</td>
<td>15.0%</td>
<td>17,217</td>
<td>12.3%</td>
<td>3,202</td>
<td>8.8%</td>
<td>3,874</td>
<td>11.1%</td>
<td>2,078</td>
<td>9.6%</td>
<td>425,673</td>
<td>14.0%</td>
</tr>
<tr>
<td>35-44 years</td>
<td>23,993</td>
<td>14.4%</td>
<td>18,165</td>
<td>13.0%</td>
<td>5,063</td>
<td>13.9%</td>
<td>4,577</td>
<td>13.1%</td>
<td>2,864</td>
<td>13.2%</td>
<td>442,018</td>
<td>14.5%</td>
</tr>
<tr>
<td>45-54 years</td>
<td>21,128</td>
<td>12.7%</td>
<td>18,457</td>
<td>13.2%</td>
<td>5,491</td>
<td>15.0%</td>
<td>4,977</td>
<td>14.2%</td>
<td>3,209</td>
<td>14.8%</td>
<td>407,424</td>
<td>13.4%</td>
</tr>
<tr>
<td>55-64 years</td>
<td>16,003</td>
<td>9.6%</td>
<td>15,689</td>
<td>11.2%</td>
<td>5,142</td>
<td>14.1%</td>
<td>4,279</td>
<td>12.2%</td>
<td>3,219</td>
<td>14.9%</td>
<td>342,706</td>
<td>11.3%</td>
</tr>
<tr>
<td>65-74 years</td>
<td>9,477</td>
<td>5.7%</td>
<td>11,023</td>
<td>7.9%</td>
<td>3,726</td>
<td>10.2%</td>
<td>2,955</td>
<td>8.5%</td>
<td>2,268</td>
<td>10.5%</td>
<td>219,567</td>
<td>7.2%</td>
</tr>
<tr>
<td>75-84 years</td>
<td>5,007</td>
<td>3.0%</td>
<td>6,883</td>
<td>4.9%</td>
<td>1,790</td>
<td>4.9%</td>
<td>1,336</td>
<td>3.8%</td>
<td>873</td>
<td>4.0%</td>
<td>123,774</td>
<td>4.1%</td>
</tr>
<tr>
<td>85 years and over</td>
<td>1,802</td>
<td>1.1%</td>
<td>2,758</td>
<td>2.0%</td>
<td>679</td>
<td>1.9%</td>
<td>463</td>
<td>1.3%</td>
<td>279</td>
<td>1.3%</td>
<td>51,794</td>
<td>1.7%</td>
</tr>
<tr>
<td>Total</td>
<td>166,904</td>
<td>100.0%</td>
<td>140,221</td>
<td>100.0%</td>
<td>36,456</td>
<td>100.0%</td>
<td>34,954</td>
<td>100.0%</td>
<td>21,639</td>
<td>100.0%</td>
<td>3,038,185</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

highest age group in region
3.3.3 Personal and household income and wealth

Income statistics of households and individuals provide some indicators of consumption, disposable income and savings. When viewed together with the average weekly rent and monthly mortgages, it offers an indicator of cost of living in an area. As such, Table 4 below provides the median personal, family and household incomes per week. It also provides the average household size and the median monthly mortgage repayments and weekly rents.

The highest figures amongst the regions are highlighted in blue and the lowest are highlighted in pink.

**Table 4  Household size and incomes by region in SEQ**

Source: ABS Census 2011

<table>
<thead>
<tr>
<th>Region</th>
<th>Brisbane</th>
<th>Gold Coast</th>
<th>Moreton Bay</th>
<th>Sunshine Coast</th>
<th>Logan</th>
<th>Redland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median age of persons</td>
<td>34</td>
<td>37</td>
<td>37</td>
<td>42</td>
<td>33</td>
<td>39</td>
</tr>
<tr>
<td>Median total personal income ($/weekly)</td>
<td>696</td>
<td>571</td>
<td>581</td>
<td>519</td>
<td>576</td>
<td>608</td>
</tr>
<tr>
<td>Median total family income ($/weekly)</td>
<td>1,873</td>
<td>1,379</td>
<td>1,451</td>
<td>1,219</td>
<td>1,381</td>
<td>1,604</td>
</tr>
<tr>
<td>Median total household income ($/weekly)</td>
<td>1,547</td>
<td>1,174</td>
<td>1,258</td>
<td>1,010</td>
<td>1,263</td>
<td>1,365</td>
</tr>
<tr>
<td>Median mortgage repayment ($/monthly)</td>
<td>2,100</td>
<td>2,075</td>
<td>1,928</td>
<td>1,863</td>
<td>1,800</td>
<td>2,000</td>
</tr>
<tr>
<td>Median rent ($/weekly)</td>
<td>350</td>
<td>350</td>
<td>300</td>
<td>320</td>
<td>300</td>
<td>350</td>
</tr>
<tr>
<td>Average household size</td>
<td>2.6</td>
<td>2.5</td>
<td>2.7</td>
<td>2.5</td>
<td>2.9</td>
<td>2.7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>Ipswich</th>
<th>Toowoomba</th>
<th>Scenic Rim</th>
<th>Lockyer Valley</th>
<th>Somerset</th>
<th>SEQ Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median age of persons</td>
<td>32</td>
<td>36</td>
<td>42</td>
<td>37</td>
<td>41</td>
<td>37</td>
</tr>
<tr>
<td>Median total personal income ($/weekly)</td>
<td>592</td>
<td>557</td>
<td>493</td>
<td>462</td>
<td>445</td>
<td>570</td>
</tr>
<tr>
<td>Median total family income ($/weekly)</td>
<td>1,398</td>
<td>1,345</td>
<td>1,212</td>
<td>1,163</td>
<td>1,069</td>
<td>1,377</td>
</tr>
<tr>
<td>Median total household income ($/weekly)</td>
<td>1,233</td>
<td>1,095</td>
<td>1,013</td>
<td>1,003</td>
<td>928</td>
<td>1,173</td>
</tr>
<tr>
<td>Median mortgage repayment ($/monthly)</td>
<td>1,733</td>
<td>1,535</td>
<td>1,733</td>
<td>1,517</td>
<td>1,500</td>
<td>1,800</td>
</tr>
<tr>
<td>Median rent ($/weekly)</td>
<td>280</td>
<td>240</td>
<td>250</td>
<td>250</td>
<td>240</td>
<td>300</td>
</tr>
<tr>
<td>Average household size</td>
<td>2.8</td>
<td>2.5</td>
<td>2.6</td>
<td>2.7</td>
<td>2.6</td>
<td>2.6</td>
</tr>
</tbody>
</table>

Highest-lowest

From 4 above, the key findings are:

- The Sunshine Coast and Scenic Rim have the highest median ages at 42 years old while Ipswich has the lowest median age at 32 years old.
It is no surprise that on an individual level, Brisbane registered the highest median personal income at almost $696 per week while the lowest was in Somerset at $445 per week. The median income for SEQ though is around $570 per week.

- The second highest individual earners are those from Redland City, followed by Ipswich, Moreton Bay then Logan who all have median weekly incomes above the SEQ average. These are the regions surrounding and adjacent to Brisbane. This shows the economic benefit of that close connection emanating from Brisbane as the primary activity centre for trade and business.

- Meanwhile, Gold Coast’s median income is similar to the SEQ median. However, the rest, Toowoomba, Sunshine Coast, Scenic Rim, Lockyer Valley, all fall below that SEQ median.

- A similar relationship exists with family income and household income. These are presented in a sorted income Table 5 Income ranking of SEQ regions below.

<table>
<thead>
<tr>
<th>Region</th>
<th>Median total personal income ($/weekly)</th>
<th>Median total family income ($/weekly)</th>
<th>Median total household income ($/weekly)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brisbane</td>
<td>696</td>
<td>1,873</td>
<td>1,547</td>
</tr>
<tr>
<td>Redland</td>
<td>608</td>
<td>1,604</td>
<td>1,365</td>
</tr>
<tr>
<td>Ipswich</td>
<td>592</td>
<td>1,398</td>
<td>1,233</td>
</tr>
<tr>
<td>Moreton Bay</td>
<td>581</td>
<td>1,451</td>
<td>1,258</td>
</tr>
<tr>
<td>Logan</td>
<td>576</td>
<td>1,381</td>
<td>1,263</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>570</td>
<td>1,377</td>
<td>1,173</td>
</tr>
<tr>
<td><strong>SEQ Average</strong></td>
<td><strong>570</strong></td>
<td><strong>1377</strong></td>
<td><strong>1173</strong></td>
</tr>
<tr>
<td>Toowoomba</td>
<td>557</td>
<td>1,345</td>
<td>1,095</td>
</tr>
<tr>
<td>Sunshine Coast</td>
<td>519</td>
<td>1,219</td>
<td>1,010</td>
</tr>
<tr>
<td>Scenic Rim</td>
<td>493</td>
<td>1,212</td>
<td>1,013</td>
</tr>
<tr>
<td>Lockyer Valley</td>
<td>462</td>
<td>1,163</td>
<td>1,003</td>
</tr>
<tr>
<td>Somerset</td>
<td>445</td>
<td>1,069</td>
<td>928</td>
</tr>
</tbody>
</table>

- A different relationship exists however when it comes to median mortgage repayments. The Gold and Sunshine Coasts’ median mortgage payments are above the SEQ average. This is not unexpected
due to both coasts being tourist destinations with aspirational lifestyle appeals which the market is willing to pay for. This is evident in Table 6 below.

**Table 6 Median mortgage repayments**

<table>
<thead>
<tr>
<th>Region</th>
<th>Median mortgage repayment ($/monthly)</th>
<th>Median rent ($/weekly)</th>
<th>Average household size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brisbane</td>
<td>2,100</td>
<td>350</td>
<td>2.6</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>2,058</td>
<td>350</td>
<td>2.5</td>
</tr>
<tr>
<td>Redland</td>
<td>2,000</td>
<td>350</td>
<td>2.7</td>
</tr>
<tr>
<td>Moreton Bay</td>
<td>1,928</td>
<td>300</td>
<td>2.7</td>
</tr>
<tr>
<td>Sunshine Coast</td>
<td>1,863</td>
<td>320</td>
<td>2.5</td>
</tr>
<tr>
<td>Logan</td>
<td>1,800</td>
<td>300</td>
<td>2.9</td>
</tr>
<tr>
<td>SEQ Average</td>
<td>1,800</td>
<td>300</td>
<td>2.6</td>
</tr>
<tr>
<td>Ipswich</td>
<td>1,733</td>
<td>280</td>
<td>2.8</td>
</tr>
<tr>
<td>Scenic Rim</td>
<td>1,733</td>
<td>250</td>
<td>2.6</td>
</tr>
<tr>
<td>Toowoomba</td>
<td>1,535</td>
<td>240</td>
<td>2.5</td>
</tr>
<tr>
<td>Lockyer Valley</td>
<td>1,517</td>
<td>250</td>
<td>2.7</td>
</tr>
<tr>
<td>Somerset</td>
<td>1,500</td>
<td>240</td>
<td>2.6</td>
</tr>
</tbody>
</table>

- Even in terms of median rents, the Gold Coast is comparable with Brisbane and Redlands at $350 per week. The demand for accommodation is of course due to the tourist market.

- For the Sunshine Coast too, the median rents are relatively higher than the SEQ average which is mostly due to the lack of housing supply. Vacancy rates ran at a low 1.4% (Figure 4 below) as against Brisbane CBD rate at 4% for the same period in 2013 (SQM research 2013).

![Figure 4 Residential vacancy rates Sunshine Coast](source: SQM research.com (2013))
3.3.4 Education

Education is one of the multi-dimensional aspects that indicate economic and social progress. Like most things as well, there are varying delivery methods available: (public or private) for education, the level of parental and community intervention, the qualifications of teachers, the infrastructure, equipment and technology. For the purposes of this comparative analysis however, we limit the discussion to the number of people attending different education levels in the various regions in SEQ at a specific timeframe.

Table 7 on the following page provides the number of people attending an educational institution by region in SEQ. The important finding here is the percentage calculation to the specific population. To arrive at that figure, the number of students reportedly studying at that education level (say pre-school) is divided by the number of children from ages 0–4, found in Table 3. Similarly for primary and secondary levels, the denominator is the age group from 5–14 year olds and for the rest of the education levels; the denominator is from ages 15 years and above.

The findings from these statistics are merely a snapshot in 2011 (at the time of the census). The figures that are highlighted are those that are higher than the SEQ average. This provides a comparative picture of the region’s performance with education. The following are some generalisations:

- Brisbane remains the education capital with more than 31.3% of its population attending an educational institution. The other end of the spectrum is the Scenic Rim with only 26.3% attending.

- The relatively young population in Ipswich and Logan also shows that many are engaged in education, with the regions both coming in equal, second to Brisbane with 30.2%.

- A clear standout in this table is the higher than average percentage of those 15 years and older attending university in the capital, Brisbane with 9.5% attending university as compared to the SEQ average of 6%.

The issue with these statistics as well is the long-term nature of education. A region would not immediately feel the effects of their investing in the upgrading of skills and education. These issues will be further discussed in Section 5.3 Education and research.
Table 7 Number of people attending an educational institution by region in SEQ

Source: ABS Census 2011

<table>
<thead>
<tr>
<th>Region</th>
<th>Brisbane</th>
<th>% to specific* population</th>
<th>Gold Coast</th>
<th>% to specific* population</th>
<th>Moreton Bay</th>
<th>% to specific* population</th>
<th>Sunshine Coast</th>
<th>% to specific* population</th>
<th>Logan</th>
<th>% to specific* population</th>
<th>Redland</th>
<th>% to specific* population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-school</td>
<td>12,478</td>
<td>19.0%</td>
<td>6,388</td>
<td>20.6%</td>
<td>4,808</td>
<td>17.1%</td>
<td>3,515</td>
<td>19.8%</td>
<td>3,727</td>
<td>16.4%</td>
<td>1,623</td>
<td>18.8%</td>
</tr>
<tr>
<td>Primary</td>
<td>80,928</td>
<td>67.5%</td>
<td>39,808</td>
<td>65.6%</td>
<td>36,546</td>
<td>66.7%</td>
<td>26,579</td>
<td>65.9%</td>
<td>26,686</td>
<td>63.6%</td>
<td>12,784</td>
<td>66.6%</td>
</tr>
<tr>
<td>Secondary</td>
<td>56,309</td>
<td>44.4%</td>
<td>28,110</td>
<td>44.7%</td>
<td>24,316</td>
<td>44.7%</td>
<td>19,178</td>
<td>47.7%</td>
<td>18,622</td>
<td>43.5%</td>
<td>9,276</td>
<td>46.1%</td>
</tr>
<tr>
<td>Technical or further edu institution</td>
<td>20,935</td>
<td>2.4%</td>
<td>9,655</td>
<td>2.4%</td>
<td>6,644</td>
<td>2.3%</td>
<td>3,815</td>
<td>1.9%</td>
<td>4,044</td>
<td>2.7%</td>
<td>7,998</td>
<td>3.7%</td>
</tr>
<tr>
<td>University or tertiary institution</td>
<td>81,021</td>
<td>9.5%</td>
<td>39,117</td>
<td>6.8%</td>
<td>36,546</td>
<td>66.7%</td>
<td>26,579</td>
<td>65.9%</td>
<td>26,686</td>
<td>63.6%</td>
<td>12,784</td>
<td>66.6%</td>
</tr>
<tr>
<td>Other</td>
<td>8,881</td>
<td>1.7%</td>
<td>5,723</td>
<td>1.0%</td>
<td>2,656</td>
<td>0.9%</td>
<td>1,925</td>
<td>0.9%</td>
<td>1,680</td>
<td>0.9%</td>
<td>837</td>
<td>0.8%</td>
</tr>
<tr>
<td>Not stated</td>
<td>65,153</td>
<td>6.3%</td>
<td>39,117</td>
<td>6.8%</td>
<td>23,175</td>
<td>6.1%</td>
<td>18,436</td>
<td>6.0%</td>
<td>20,173</td>
<td>7.3%</td>
<td>7,052</td>
<td>5.1%</td>
</tr>
<tr>
<td>Total</td>
<td>325,705</td>
<td>31.3%</td>
<td>147,986</td>
<td>29.8%</td>
<td>108,367</td>
<td>28.7%</td>
<td>83,890</td>
<td>27.3%</td>
<td>83,960</td>
<td>30.2%</td>
<td>38,488</td>
<td>27.8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>Ipswich</th>
<th>% to specific* population</th>
<th>Toowoomba</th>
<th>% to specific* population</th>
<th>Scenic Rim</th>
<th>% to specific* population</th>
<th>Lockyer Valley</th>
<th>% to specific* population</th>
<th>Somerset</th>
<th>% to specific* population</th>
<th>SEQ</th>
<th>% to specific* population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-school</td>
<td>2,243</td>
<td>15.4%</td>
<td>1,570</td>
<td>15.4%</td>
<td>334</td>
<td>14.5%</td>
<td>371</td>
<td>15.3%</td>
<td>217</td>
<td>15.0%</td>
<td>37,274</td>
<td>18.2%</td>
</tr>
<tr>
<td>Primary</td>
<td>16,412</td>
<td>64.9%</td>
<td>13,350</td>
<td>66.9%</td>
<td>3,438</td>
<td>66.0%</td>
<td>3,352</td>
<td>63.3%</td>
<td>2,010</td>
<td>64.3%</td>
<td>261,893</td>
<td>66.2%</td>
</tr>
<tr>
<td>Secondary</td>
<td>10,622</td>
<td>42.5%</td>
<td>9,643</td>
<td>46.1%</td>
<td>2,387</td>
<td>47.2%</td>
<td>2,249</td>
<td>42.0%</td>
<td>1,371</td>
<td>45.4%</td>
<td>182,083</td>
<td>44.8%</td>
</tr>
<tr>
<td>Technical or further edu institution</td>
<td>3,385</td>
<td>2.7%</td>
<td>2,478</td>
<td>2.3%</td>
<td>494</td>
<td>1.7%</td>
<td>512</td>
<td>1.9%</td>
<td>304</td>
<td>1.8%</td>
<td>57,765</td>
<td>2.4%</td>
</tr>
<tr>
<td>University or tertiary institution</td>
<td>4,799</td>
<td>3.8%</td>
<td>5,975</td>
<td>5.4%</td>
<td>615</td>
<td>2.1%</td>
<td>1,291</td>
<td>4.7%</td>
<td>311</td>
<td>1.8%</td>
<td>146,026</td>
<td>6.0%</td>
</tr>
<tr>
<td>Other</td>
<td>1,024</td>
<td>0.8%</td>
<td>867</td>
<td>0.8%</td>
<td>194</td>
<td>0.7%</td>
<td>185</td>
<td>0.7%</td>
<td>98</td>
<td>0.6%</td>
<td>22,341</td>
<td>0.9%</td>
</tr>
<tr>
<td>Not stated</td>
<td>11,939</td>
<td>7.2%</td>
<td>8,946</td>
<td>6.4%</td>
<td>2,138</td>
<td>5.9%</td>
<td>2,883</td>
<td>8.2%</td>
<td>1,442</td>
<td>6.7%</td>
<td>200,463</td>
<td>6.6%</td>
</tr>
<tr>
<td>Total</td>
<td>50,424</td>
<td>30.2%</td>
<td>42,829</td>
<td>30.5%</td>
<td>9,600</td>
<td>26.3%</td>
<td>10,843</td>
<td>31.0%</td>
<td>5,753</td>
<td>26.6%</td>
<td>907,845</td>
<td>29.9%</td>
</tr>
</tbody>
</table>

Note: The denominator used in calculating % of age group varies per education level. Below are the specific denominator age group taken from the ABS Census 2011 data presented in Table 3-3 per region.

Pre-school: 0-4 years
Secondary: 10-19 years
Primary: 5-14 years
Technical or further education, University or tertiary institution, and other: 15+
Not stated: Total population

Figures are equal or above SEQ average
3.3.5 Journey to work

One of the anecdotes most people from the Sunshine Coast hear, is the traffic encountered when travelling into Brisbane. With that, is the conclusion that many of our workers need to travel into Brisbane to gain employment. These notions however can be dispelled with the journey-to-work data from the most recent census.

Table 8 below provides a quick snapshot of the workforce from selected regions travelling into and from Brisbane.

**Table 8 Journey to work to Brisbane of key SEQ regions**

Source: OESR 2011

<table>
<thead>
<tr>
<th>Region</th>
<th>% to Total</th>
<th>Total workforce</th>
<th>% to Total</th>
<th>Total workforce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunshine Coast</td>
<td></td>
<td>135,073</td>
<td>100%</td>
<td>578,918</td>
</tr>
<tr>
<td>Within region</td>
<td>76%</td>
<td>102,179</td>
<td>80%</td>
<td>462,045</td>
</tr>
<tr>
<td>Within SEQ</td>
<td>7%</td>
<td>8,921</td>
<td>8%</td>
<td>48,635</td>
</tr>
<tr>
<td>Into Brisbane</td>
<td>4%</td>
<td>5,187</td>
<td></td>
<td></td>
</tr>
<tr>
<td>From Brisbane</td>
<td>1% *</td>
<td>796</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Moreton Bay</td>
<td></td>
<td>176,547</td>
<td>100%</td>
<td>132,460</td>
</tr>
<tr>
<td>Within region</td>
<td>43%</td>
<td>76,157</td>
<td>38%</td>
<td>50,775</td>
</tr>
<tr>
<td>Within SEQ</td>
<td>42%</td>
<td>74,774</td>
<td>45%</td>
<td>60,097</td>
</tr>
<tr>
<td>Into Brisbane</td>
<td>40%</td>
<td>70,591</td>
<td></td>
<td></td>
</tr>
<tr>
<td>From Brisbane</td>
<td>12% *</td>
<td>11,317</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ipswich</td>
<td></td>
<td>122,702</td>
<td>100%</td>
<td>237,686</td>
</tr>
<tr>
<td>Within region</td>
<td>52%</td>
<td>63,272</td>
<td>71%</td>
<td>168,142</td>
</tr>
<tr>
<td>Within SEQ</td>
<td>33%</td>
<td>40,557</td>
<td>11%</td>
<td>25,538</td>
</tr>
<tr>
<td>Into Brisbane</td>
<td>29%</td>
<td>36,116</td>
<td></td>
<td></td>
</tr>
<tr>
<td>From Brisbane</td>
<td>19% *</td>
<td>16,958</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gold Coast</td>
<td></td>
<td>237,686</td>
<td>100%</td>
<td>237,686</td>
</tr>
<tr>
<td>Within region</td>
<td>71%</td>
<td>168,142</td>
<td>71%</td>
<td>237,686</td>
</tr>
<tr>
<td>Within SEQ</td>
<td>11%</td>
<td>25,538</td>
<td>11%</td>
<td>237,686</td>
</tr>
<tr>
<td>Into Brisbane</td>
<td>7%</td>
<td>15,917</td>
<td></td>
<td></td>
</tr>
<tr>
<td>From Brisbane</td>
<td>2% *</td>
<td>4,520</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*percentage of total of jobs in region

From this table, we see that only 4% of the Sunshine Coast population travels into Brisbane daily. Similar relatively low figures register on the Gold Coast with only 7% of workers travelling into Brisbane, unlike the surrounding regions to Brisbane, where the percentage of workers travelling into Brisbane are significantly higher – Ipswich 29%, Logan 35%, Moreton 40%.

From the regions reported in the journey to work information from the Queensland Office of Economic and Statistical Research, only Brisbane is the
‘net importer’ of labour into their region with about 28% of their workers coming from outside its region.

These statistics further enforce the economic strength and financial status of the Brisbane CBD.

### 3.4 Economic plans and programs

This next section provides a summarised version of the review of the economic plans and programs of the 11 regional councils. From this review, it can be said that the three regional centres of Brisbane, Gold Coast and Sunshine Coast have distinct and articulate economic development plans, focusing on diversifying their economies by investing into new markets, particularly in the high-value knowledge-based industries.

Brisbane’s vision is to be considered as a “top ten lifestyle city and global hub for resource and related service industry businesses” (Brisbane City Council, 2012, p 2). The dominance of Brisbane compared to neighbouring regions is clear, with a high percentage of workers commuting to the capital where many major industrial and commercial centres are located. Although the regional councils of Ipswich and Moreton Bay state they wish to attract new businesses and invest in the knowledge economy, they will find it difficult to challenge Brisbane and its high quality lifestyle and the opportunities which abound in a large and diverse economy. On the other hand, the regional councils of Redland and Logan City acknowledge a need to attract new businesses, however their focus remains on preserving their traditional industries.

Meanwhile, the more rural regions of Somerset, Lockyer Valley and the Scenic Rim are clear in their desire to support their agricultural industry and grow their tourism base. And the most targeted economic plan is that of Toowoomba who have a clear, specific purpose for the region which is to maintain and expand servicing to the Darling Downs and Surat Basin especially in regards to professional support for the mining industry.

Distance from the primary activity centre, a fast growing population and a desire to evolve have resulted in the two coastal regions (Gold and Sunshine) planning to be more specific in their respective developments as independent economic hubs. The objective of the City of Gold Coast is to diversify its market by “making a concerted effort to move towards more knowledge-intensive, high-value and internationally competitive economic activities” (City of Gold Coast, 2013, p 1). Likewise, the Sunshine Coast Regional Council’s focus is on generating new investments, attracting larger organisations to the region, and placing “a high value on entrepreneurship, talent and creativity, technology and
innovative business practice” (Sunshine Coast Council, 2013, p 6). Table 9 below lists the top priorities found in each of the region’s economic development plans.

### Table 9 SEQ Regional Councils’ economic priorities

<table>
<thead>
<tr>
<th>Regional Council</th>
<th>Date</th>
<th>Top Priorities</th>
<th>Source</th>
</tr>
</thead>
</table>
| Brisbane         | 2012 | • Continue to develop new markets such as high value professional and technical services  
• Become a global hub for resource and related industries  
• Provide the infrastructure and develop partnerships that will attract workers and businesses | Brisbane City Council (2012), Brisbane Economic Development Plan 2012-2031, Queensland Government |
| Gold Coast Council | 2013 | • Diversify economy by investing in high-value, knowledge based industries  
• Attract international businesses  
• Grow tourism  
• Support and grow other traditional industries such as construction and retail | City of Gold Coast, (2013b). Draft Economic Development Strategy 2013-2023 – Executive Summary, Queensland Government. |
| Moreton Bay      | 2010 | • Expand key industry of advanced manufacturing  
• Attract knowledge-driven, innovative businesses  
• Support other industries such as professional services, education and health | Moreton Bay Regional Council, (2010). Moreton Bay Regional Council Economic Development Strategy 2010-2015, Queensland Government |
| Sunshine Coast   | 2013 | • Invest in high-value industries such as education, health and professional services  
• Build relationships with both domestic and global markets  
• Develop new investments and attract larger organisations  
• Support and expand traditional industries such as tourism | Sunshine Coast Council, (2013). Sunshine Coast – The natural advantage: Regional Economic Development Strategy 2013-2033, Queensland Government |
| Logan City       | 2013 | • Build major infrastructure  
• Attract new businesses  
| Redland City     | 2010 | • Grow tourism industry  
• Support low impact industries such as creative businesses  
• Maintain current industries such as retail, horticulture and specialist manufacturing | Redland City Council, (2010). Redland City Council Corporate Plan 2010-2015, Queensland Government |
| Ipswich City     | n.d. | • Maintain and grow key industries such as manufacturing, aeronautical, transportation and agriculture  
• Attract new industries to the area  
| Toowoomba        | 2013 | • Grow professional and higher order services for mining industry  
• Maintain and expand servicing of the Darling Downs and Surat Basin  
• Continue to support and diversify key industries such as manufacturing, agriculture and education | Toowoomba Region Council, (2013). Toowoomba Region Economic Development Strategy, Queensland Government. |
| Scenic Rim       | 2013 | • Invest in infrastructure  
• Support existing and new businesses  
<table>
<thead>
<tr>
<th>Regional Council</th>
<th>Date</th>
<th>Top Priorities</th>
<th>Source</th>
</tr>
</thead>
</table>
| Lockyer Valley   | 2013 | • Maintain and grow agricultural industry  
|                  |      | • Maintain and grow location as a distribution centre  
|                  |      | • Grow tourism | The Stafford Group (2013), Economic Development Plan prepared for Lockyer Valley Regional Council, Brisbane, Queensland. |
| Somerset Council | 2010 | • Grow tourism  
|                  |      | • Support agricultural industry  

### 3.5 Regional comparison and interfaces – deductions from statistics

Nothing in economics or demographics stays the same over time. When one considers regional development those continuous changes are played out against a backdrop of unchanging physical geography and of prior capital investment and existing built assets which are slow to change and evolve.

The overall environment is truly dynamic and as those changes occur in waves onto that physical backdrop, the actual ability for a particular region and its resource (physical and human) base to respond, will vary from case to case (Brand 1994). The SEQ case study area exemplifies this with the 11 regions all responding quite differently to economic and other events that are presenting themselves to each of them – in global, national and regional sources.

Brisbane City remains dominant because of its scale, history and critical mass of public infrastructure, government and educational institutions, corporate headquarters and so on. For all of that, the proportion of the regional population, and with it, the portion of regional income secured by those individuals and households, has diminished dramatically in a single generation. In 1954, 78% of SEQ’s population lived in Brisbane; today, only 40% make up the total SEQ population. Geographic constraints on Brisbane’s growth, together with its cost structures and relatively poor transport infrastructure and (until recent times, at least) quite limited densification, has growth largely occurring in the outer-lying regions as shown in Figure 5 below.
Of the other regions in SEQ, three, the Scenic Rim, Lockyer Valley and Somerset are very small and though not denying their viability and other positive characteristics, future prospects will remain limited in scope and scale. The two exceptional regions in SEQ are the Gold Coast and the Sunshine Coast – Gold Coast because of its size and unique characteristics and drive described earlier in this work. That quite individualistic growth will continue with a further maturing of the links with Brisbane but on an increasingly equal basis.
4 DYNAMIC RELATIONSHIPS IN SEQ, BRISBANE AND THE SUNSHINE COAST

The Sunshine Coast region presents quite a different prognosis and its relationships with Brisbane are quite different. In the first instance, because it is beyond the normal 'commuter zone', its labour market is much less influenced by Brisbane – with only about 4% of the Sunshine Coast labour force travelling to Brisbane for employment each day. Seriously deficient road and rail infrastructure makes the commute to Brisbane particularly unattractive. Even as the road link is improved to the outskirts of Brisbane, the long commute through the northern suburbs, plus rising transportation costs will not result in dramatic changes in that percentage until efficient heavy rail links are provided and that may be decades into the future.

Brisbane, of course, remains a very important market for the Sunshine Coast – for day trips and the holiday market together with a market for regional product and produce. Further, access to Brisbane International Airport, located on the northern outskirts of Brisbane, represents a significant benefit both to the tourist and business markets. At this stage, the Sunshine Coast airport does not regularly accommodate international flights.

The comparison between the two and their evolving relationships is, however, not confined to built assets and infrastructure. A rapidly growing region demands capital investment to develop, particularly in a largely peri-urban space. Institutional and individual investors in capital assets and infrastructure as well as debt and venture capital for business will, all things being equal, prefer the safety of a larger, more mature place for investment (such as Brisbane) than smaller, 'pioneering' ones (such as from the Sunshine Coast) (Ferguson 2008). Overall, however, the future of the Sunshine Coast, its economy and population, are very much in its own hands – again, providing some parallels with the earlier and continuing development of the Gold Coast.

This level of independence is not without its dangers – the region was remarkably affected by the global financial crisis in 2008 because of its narrow economic base dominated by tourism, retail and construction. Nevertheless, the Sunshine Coast has inherent advantages. In the first instance, it is an aspirational place – a region where individuals from around Australia and increasingly, overseas, desire to live – based on its environment, lack of congestion and availability of services either locally or in Brisbane to the south. Over recent years, it has greatly enhanced its educational and health sectors with the advantages of that now becoming more obvious.
Again, perhaps like the Gold Coast of several decades ago, migrants, be they firms, households or individuals, are quite eclectic. Increasingly, they are drawn from the professions and from high wealth individuals, unlike the ‘surf and retirement’ culture of times past. Its economic blueprints recently released reflect that change, and its potential as a destination in its own right is unequalled in any of its sister regions, except perhaps for the Gold Coast.

Finally here, it is probably important to note that the economic, or social/community interaction between the various nodes appears limited except for ongoing bilateral links with Brisbane as the central place. Whilst there are political and policy advantages in the continual association of SEQ mayors in representing the interests of the wider region, coordinating infrastructure provisions and creating structured links between those nodes may be of limited value.
5  MISSING LINKS AND STRENGTHENING TIES

This paper proposes that, following the path of the Gold Coast four decades ago, the Sunshine Coast, if properly managed and planned, will develop further as an independent urban area with links to, but separate from, Brisbane City. This does not mean that, in spatial layout and urban design, it will mimic the Gold Coast. (That duplication is highly unlikely given the physical nature of this region, its history and philosophy and, in a very practical way, the lack of large scale funds for tourist infrastructure such as that supplied by Japanese investors to the Gold Coast in the 1970/80s.)

As in practically all regions in Australia and through the OECD, the global financial crisis of 2008/9 dramatically disrupted economic development. The Sunshine Coast was likewise affected, particularly in its construction and development sectors.

There are now however, reasonable and consistent signs that the process of wealth creation is again underway. That of course is a very long path – broken confidence takes a long time to be restored. But there are positive signs of a much more sophisticated economy growing – including the rapid growth of sectors such as health, education and professional services. This move to a more broadly based economy is outlined in the Sunshine Coast Natural Advantage Regional Economic Development Plan 2013-2033 released in October 2013.

These sectors, together with existing major groupings such as tourism, retail, construction and development need to now create their individual strategies to align with an obviously changing environment.

Regardless of the potential here, some sectors remain small and their networks and linkages, both within the region and to the wider SEQ and global markets, need to be supported. This does not imply that government should overly structure or contrive markets – and in fact the reverse is true. Government at all levels should set a conducive environment, provide market intelligence, clear roadblocks and then leave the private sector to do what it does best – generate wealth and jobs through investment and entrepreneurial skills.

That support will really only be generated by government, associations, institutions and individual firms within the region. Little external help that particularly favours the Sunshine Coast will be generated from outside of the region itself. Over upcoming years, some of the obvious areas where specific help with linkages and positioning will be required are as follows:
5.1 Keeping and further developing identity

The Sunshine Coast is fortunate that, over some decades, it has established and still holds a particular, favourable reputation – centred mainly on the image of its beaches, lifestyle and its physical setting. Some may argue that its image is not necessarily conducive to a contemporary business environment because of a perceived ‘laid-back’ manner often associated with the area. On the contrary, that image is one of aspiration and, from that base, can evolve and be refined further into the future.

Importantly too, unlike the closer-in commuter regions surrounding Brisbane, the Sunshine Coast still represents a very defined destination and, with the Gold Coast to the south, are the only regions in SEQ to really achieve that. Perhaps that is because both of those regions are a little further distant from the centre. Further, the Sunshine Coast still retains a distinct greenbelt of approximately 20 kilometres which provides a physical separation from Brisbane’s northern growth which now extends up well north of Caboolture. That is a particular advantage that has been lost in the southern corridor with low density, urban sprawl development extending now almost unbroken from Brisbane to the Gold Coast.

The northern greenbelt must be retained and in fact enhanced by the progressive replacement of the current pine plantation with a biologically diverse vegetation belt which could become a long-term feature of the region.

Parallels could be drawn with the greenbelt areas around many urban centres in the UK and also with the National Parks surrounding Sydney – see Figure 6 below. Sydney’s physical setting does not relate simply to the harbour and the beaches but to the backdrop of Kuringai and Lane Cove National Parks to the north, Royal National Park to the south and the Blue Mountains to the west. These provide a permanent natural frame for the entire city and differentiate it from Gosford/Newcastle to the north and Wollongong to the south.
The establishment of the National Parks, so important to the character of Sydney today, was the result of community action and government responses in the late 1800s. In a similar way, the establishment of a permanent greenbelt along the boundary of the Sunshine Coast and Moreton Bay and of the Hinterland/Glasshouse could be the subject of concerted civic and government action here.

Other (commuter) regions in SEQ, by comparison, will face a continued threat of loss of identity and be viewed as simply dormitory or outer suburbs of Brisbane.

Considering this region’s positive identity, the branding of its production, particularly produce, specialist manufacture and arts and crafts may benefit...
from a name associated with the region. Currently where such locational branding is used, it is very specific rather than regional – i.e. ‘Maleny Dairy’, ‘Kenilworth Cheese’ and various brands using the name ‘Noosa’.

There is no suggestion of course, that there is reason to change those – in marketing it is often a case of ‘whatever works’. Nevertheless, the case study of Byron Bay in northern New South Wales would provide an example of how wider regional branding can have a significant, positive effect on the identity, trading and linkages of the quite small but well recognised name with the wider Australian and international markets.

Not dissimilar to the Sunshine Coast, Byron Bay is recognised for its remarkable natural environment, beach and, to some extent, alternate culture and lifestyle. All of that has attracted a range of businesses that leverage off that image in the wider market. These include all manner of food and food production (particularly organic) and a range of processed food products, high level fashion designs and surf and sporting equipment recognised on the national market and, in many cases, globally.

Whether or not that represents a regional marketing opportunity and further development for the Sunshine Coast would appear to be a matter worthy of further investigation.

5.2 Professionals and networks

A range of professional services have already been drawn to the Sunshine Coast and represents a high growth, high value opportunity that is far less volatile than many other major sectors in the region. A number of these sub-sectors, particularly related to medical science and research, will take time to evolve as both the Sunshine Coast University Hospital and the University itself gain scale and recognised areas of speciality. Others such as a range of professions including engineering and development disciplines, architecture, advertising, marketing and many others are already located here and, despite the poor recent economic climate, have a good future prognosis.

Large public infrastructure and private investment projects are already underway in the region. They are now attracting the growth of these services and that, in turn, provides an opportunity for their longer-term and larger scale relocation. The Sunshine Coast represents an excellent location for such consultants who, because of the nature of their work, will always have to travel to projects, domestically and internationally. A base on the Sunshine Coast with its lifestyle, amenities, education, schooling and health, combined with very
close access to an international airport, makes it a desirable location for those professional firms and staff.

This trend has been taken even further by architectural practices in the region that, over some decades, have developed an identifiable subtropical, Sunshine Coast vernacular style. The USC campus has become something of a living laboratory for that, but other institutions need also to take such concepts up more fully and for work to be carried out to ensure that it is better documented, promoted and celebrated.

Across such professional areas, professional networks, information flows and strategic alliances are essential both for the individuals in the development of their careers but also for firms seeking contacts and strategic relationships. That occurs widely and frequently in major cities but is more difficult to establish in regional areas where industry and professional associations typically have fewer members and limited organisation.

These are areas where a small amount of effort from an economic development agency or overarching business group can promote and support those professional bodies to ensure that they remain linked with, and recognised by, those in the larger cities.

Professional development activities and networking need to be encouraged among, and, where appropriate, jointly with those groups. The University and other conference facilities can be used for such activities, not only for local professionals but also to attract others from outside the region in the growing professional development and continuing education market.

5.3 Education and research

The importance of a vibrant, high quality education sector has been identified elsewhere in this paper. Its value comes from direct economic impact on employment, investment and consumption and also in its vital role in skilling its workforce and encouraging links outside the region.

Here again, the Sunshine Coast already has a sound record and strong platform for growth. Its education and training sector is proportionally somewhat larger than that of other comparable regions (see Table 7 Number of people attending an educational institution by region in SEQ). There is however, much greater potential available here and that, at least in part, will rely on the development of further linkages and exposure to outside the region.
Attraction of international students at school, technical and tertiary levels represents a high growth, high potential opportunity within the ‘trading sector’ described in Section 2.2. Already a substantial proportion of the students are drawn from outside the region and overseas countries with international students already constitute about 10% of USC’s student base.

An initiative currently underway will see enhanced coordination across all parts of the education sector, improve communication, share market intelligence and particularly to help promote the region as a quality, convenient and safe destination. The future business environment will demand such cooperation and alliances (Porter 1998).

The tertiary education sector is already making a major contribution to the future shape of the region’s workforce and business. In 1996, when USC was first established, only 4.1% of Sunshine Coast residents between the ages of 15-24 attended a university. By 2011 that proportion had grown to 13.5%, and is now approaching the state average of 16.7%. (See Figure 7 below.)

<table>
<thead>
<tr>
<th>LGA Region</th>
<th>15-24 year olds</th>
<th>15+ year olds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunshine Coast</td>
<td>4.1% 6.1% 9.2% 13.5%</td>
<td>1.7% 2.7% 2.7% 3.8%</td>
</tr>
<tr>
<td>Brisbane</td>
<td>24.4% 28.3% 27.1% 31.3%</td>
<td>0.9% 1.4% 1.4% 1.4%</td>
</tr>
<tr>
<td>Fraser Coast</td>
<td>2.9% 4.9% 5.4% 5.5%</td>
<td>1.4% 1.7% 1.8% 2.1%</td>
</tr>
<tr>
<td>Gympie</td>
<td>2.1% 3.4% 2.8% 3.6%</td>
<td>1.1% 1.2% 1.2% 1.4%</td>
</tr>
<tr>
<td>Moreton Bay</td>
<td>8.7% 10.5% 9.7% 11.4%</td>
<td>3.1% 3.3% 2.9% 2.4%</td>
</tr>
<tr>
<td>Somerset</td>
<td>4.2% 4.3% 4.2% 5.8%</td>
<td>1.6% 1.5% 1.4% 1.6%</td>
</tr>
<tr>
<td>Queensland</td>
<td>12.6% 15.1% 14.5% 16.7%</td>
<td>4.5% 5.0% 4.4% 5.0%</td>
</tr>
</tbody>
</table>

*Figure 7 Selected education statistics by local government area*

This increase of 229.3% of 15–24 year olds attending a tertiary institution from the 1996 census to 2011 is a remarkable achievement. In Brisbane this increase was only 28.3% and in Queensland 32.5% over the same period.

This remarkable achievement was based on the independently assessed quality of the USC offer and underpinning the critical importance of having a full tertiary campus located within the region. Those figures are likely to rise considerably with major new programs such as law and a range of health sciences now becoming available.

For all of that however, efforts must be further enhanced. By way of comparison, Brisbane’s position as the pre-eminent business and economic hub for the state is underpinned by its skilled workforce. In Brisbane, 31.3% of 15-24 year olds attend university (Figure 7 above). If the Sunshine Coast is to develop into a true partner complementing and leveraging from Brisbane, that ‘tertiary gap’ must be closed.

The issue is however, wider than that. USC is now pursuing a much more ambitious research agenda in areas of particular relevance to the region – health, sustainability, genomics and a number of others emerging. Any university’s strength, profile and linkages are largely based on its research efforts.

One cannot be too critical of a university that has only been in existence for 17 years and has achieved a great deal in that time. For all of that however, USC is undersized given the size and growth rates of its catchment. By comparison, Wollongong in the Illawarra Region has a population and a number of other characteristics not dissimilar from that of the Sunshine Coast. Its university, the University of Wollongong, is approximately three times the size of USC and with a much larger research base. There are many reasons for that – the most obvious being the long history of that university and its links to manufacturing and engineering. Universities like Wollongong typically have major research themes and research centres, supported by government and/or industry. To grow and develop similar necessary linkages and networks, USC must, as soon as possible, also seek out such a research base, the core of which would probably have to be imported from outside the region.

This may, on the face of it, appear to be a challenge that belongs to the University itself. It is however, a matter that will need the support of the entire region. The securing of such a centre is difficult and expensive in a highly competitive market. However, should an appropriate centre be secured then
that will become another important area of excellence and interface with SEQ and onto the global community.

5.4 Attracting capital funding

Like every other Australian region, the Sunshine Coast is under capitalised – a situation made worse here because of the region’s very high potential and the number of projects and initiatives demanding of funding.

As well as the normal demands for ‘retail’ finance – residential mortgages, consumer credit etc., the demands for finance typically fall into three categories. Firstly, funds for public infrastructure, traditionally from government consolidated revenue and borrowings and, more recently, also through Public Private Partnerships (PPPs). Secondly, in the private sector, funding is required for urban development (land development and building construction). Finally, funding for businesses and commercial activity in terms of debt, equity or some form of venture capital for early stage enterprises.

It would appear that the next five years will be periods of significant public sector investment in Sunshine Coast infrastructure – particularly the Sunshine Coast University Hospital and the commitments already to the upgrade of the Bruce Highway. The latter is of critical importance for business and particularly for support of the tourist industry, though, as noted above, the numbers of workers actually commuting to Brisbane using private motor vehicles is relatively small compared with other SEQ regions. Investment in heavy rail and passenger rail will be essential to significantly change those commuter statistics, particularly given rising fuel prices.

Financing for private construction/development projects has remained very subdued since the GFC, a condition that is blamed (with some justification) on the conservatism of the four banks which dominate the market.

Without wishing to sound dismissive of what have been very difficult times for that sector over the last five years, the underlying issues also relate to a lack of owner/tenant demand and lack of market confidence. When sound demand, income and investment return from such assets can be better guaranteed, money will flow back to that sector from either domestic or international sources. Indications at the time of writing are that such an environment is starting to return.

Much more serious financial issues emerge for risk/venture capital to support companies’ expansion and for the establishment of new ones (particularly in ‘knowledge sectors’) on the Sunshine Coast.
A fundamental problem is that such finance, which is difficult enough to secure for any Australian company, aggregates and is much more comfortable with investments in the capital cities – Sydney, Melbourne and, to a lesser extent, Brisbane. By the standards of venture capitalists, business on the Sunshine Coast appears to involve a further level of risk in what is, for them, a more remote and pioneering location.

The Innovation Centre Sunshine Coast (ICSC), proves that this perception can be changed but it requires specific action, with the patronage of the leaders of the Sunshine Coast business and political community, to present those companies/sectors to traditional and less traditional financiers in Brisbane, other parts of Australia and probably internationally.

Such activities need to be well targeted through special investment missions, showcase opportunities, publicity and the provision of editorial comment into relevant magazines and newspapers. Again these are relatively low cost initiatives and yet, probably with the exception of the Gold Coast, few other regions have specific strategies in these critically important areas.

Local innovative companies demonstrably have ideas and talent and can obtain corporate/business advice to assist in their development. What they typically require is improved exposure/ linkages to financiers and markets. That has proven a particular challenge for small individual firms in a regional location.

5.5 Infrastructure links – specifically the National Broadband Network (NBN)

This paper recognises that significant amounts of work are already underway through various levels of government and the business community to enhance physical infrastructure and linkages to Brisbane and beyond. Foremost in that is the upgrade of the Bruce Highway which is obviously important for daily commuters to Brisbane but is also fundamental to community safety and to normal business and trade and, in particular, to the region’s tourism industry which remains heavily reliant on the domestic tourists and day-trippers from Brisbane.

Upgrades for (heavy) passenger rail are essential and, more than the upgrade of the Bruce Highway, would increase the proportion of the workforce travelling to Brisbane.

Other comparable regions with a quality heavy rail access (e.g. Geelong, Ballarat and Gold Coast) provide convenient access for professionals and other skilled residents and add considerably to gross regional product of the home
region. In Geelong, 30,000 commuters a day and in the Gold Coast, 25,000 commuters a day use the safe and quick public rail services to the capital. Importantly too, the number of commuters travelling to the region also increases over time, thereby underpinning that local, professional skill base.

The upgrade of the Sunshine Coast airport will also represent a significant underpinning to both the tourist and business sectors. The challenges here are recognised and the need for interim solutions is also important.

In any event and for the purposes of this paper, work on these projects, except for rail, appears well advanced and does not require further comment here except for endorsement of their importance.

Another key infrastructure link is that of ICT and particularly the installation through this region of the National Broadband Network (NBN). With regard to the optimisation of that facility through links within and external to the Sunshine Coast, the following observations need to be made.

In the first instance, regions that secure this infrastructure early will be at a considerable advantage and that advantage may be sustained for a number of years at least. Secondly, even when that hard infrastructure is installed across the whole of SEQ and the rest of Australia, it will, by definition, be available to all regions and businesses and therefore present something of a ‘zero sum game’ as regards comparative advantage and competitiveness.

Leer (2000) notes that the installation ICT infrastructure, of itself, has quite limited economic impact – and indeed may be disruptive. Large increases in productivity and therefore regional competitive advantage, come from the combination of human resources, business systems, networks and clusters that use the new hardware to maximum overall advantage. The reported experience of NBN adaptation in other regions with access to that infrastructure has exposed the unpreparedness of businesses and the community and, to date anyway, the overall impact has been somewhat disappointing.

For the purposes of this paper and the development of the interfaces between Sunshine Coast, SEQ and other regions, two matters would appear to require attention here. Firstly, through whatever political and organisational means are available, the Sunshine Coast needs to secure early NBN infrastructure roll-out – there will be real advantages in that. Secondly, and perhaps more important, information and readiness programs need to be better organised and more fine-grained than those which are apparently provided by the NBN organisation itself. Such preparation would ensure better, more efficient and coordinated take-up thereby transforming the NBN into a unique advantage. Few regions
collectively appear to have clearly understood or organised themselves to maximise this remarkable offer. For a region like the Sunshine Coast which seeks to promote a new economic environment, this would appear to be a low cost, high impact opportunity that needs to be well structured and advanced quickly.
6 CONCLUSION

This work attempts to provide a fusion of contemporary research into economics and regional development considering the physical, historic parameters of SEQ and within that the position and future of the Sunshine Coast region.

By any definition, these are now fundamentally different times. In part, that is related to a post-2008 global financial crisis environment which has on-going challenges from institutional and business restructuring. However, concerns are much wider than that and go to demography, the urbanisation of practically all countries and in the OECD, quite different ways of responding to issues and opportunities as diverse as aging population, education and knowledge transfer, sustainability, self-fulfilment and lifestyle.

Perhaps by its natural advantage and good fortune, the Sunshine Coast region is quintessentially well placed to now move into a different, much more mature and sophisticated phase of regional, economic and community development. This reflects fundamental changes in the definition of regions across areas such as SEQ and the development patterns that emerge in peri-urban areas, ‘economic commons’ between the emerging economic nodes.

The research recognises that within the 11 regions of SEQ there is remarkable diversity. Much of that is historic in nature and will change little over time. Brisbane itself has had low levels of population growth for many years, reflecting the limited land supply with recent growth only coming from limited infill opportunities and the densification in inner city areas. For all of that however, it has become significantly richer, economically deeper, and culturally and ethnically more diverse. Brisbane will remain the unchallenged primary activity centre surrounded by the ‘commuter zone’ regions (Moreton Bay, Redland, Logan and Ipswich). Meanwhile, the furthest extent of the region will remain rural based and with a relatively smaller population (Lockyer Valley, Somerset and Scenic Rim).

This leaves the north and south regions as stand-alone areas (Gold Coast and Sunshine Coast). Over the past 40 years and assisted by foreign investment for tourism and property development, the Gold Coast has successfully charted its own course. To date, it has been a unique case study in Australian urban history. It is a highly successful city, known globally, not based on a long history or hierarchy but rather a lifestyle destination for residents, visitors and investors alike.
This research shows there is now strong evidence that a similar, relatively free standing 'destination' region is now available to the Sunshine Coast. Care must be taken to ensure that the region’s future is not set by the preconditions of the past, nor is the physical development model of the Gold Coast relevant to what can be achievable here. What is critical however is the ability for a region to reach a critical mass and to have key competitive advantages to set its own trajectory into the future. The Sunshine Coast has effectively reached that point. This is not to imply that the linkages with the balance of SEQ especially Brisbane, are not important – in fact they are even more important. It may be the form that may be different, reflecting a more mature two-way relationship.

Almost ironically, a key starting point to the development of those linkages is to ensure that the identity and separate character of the Sunshine Coast be defended and reinforced. This is a comparatively easy task given the physical separation from the balance of SEQ and the excellent image and reputation of this region to the rest of Australia.

As well as economic development strategies for the region, which are largely outside the scope of this research, the work identifies four key linkages with the balance of SEQ, Brisbane and beyond that are of fundamental importance through this next phase. They are:

- Professional linkages and networks
- The further development of education and research (including health disciplines)
- Improved exposure and linkages to the financial sector, mainly for business investment and venture capital
- Physical infrastructure development in road, rail and air transport in becoming the exemplar region for take-up and application of the national broadband network (NBN).

The Sunshine Coast now enters a new era. Its natural, business and community advantages represent the key drivers for successful communities now and into the future. Remarkably, that future lies in the hands of this community, particularly of the current government, business, academic and community leaders. The challenge is to fully understand and appreciate that evolution, communicate and involve the wider community, and to plan and act to seize that future.
7 REFERENCES


Brugmann, J 2009, Welcome to the urban revolution – How cities are changing the world, Queensland University Press, Australia.


Gleeson, B & Steele, W (eds.), *A climate for growth planning South-east Queensland*, Queensland University Press, Australia.


Salt, B 2014, *The big shift … Who we are and where we are headed?* (3rd edn.), Hardie Grant Books, Melbourne, Australia.


Spearritt, P 2009, The 200Km city: Brisbane, the Gold Coast and Sunshine Coast, *Australian Economic History Review*, vol. 49, no. 1.


Wardner, P 2013, Reassessing the value added by centres providing non-retail employment in master planned communities in South-east Queensland, University of the Sunshine Coast, Australia.
APPENDIX A  SOUTH-EAST QUEENSLAND REGIONAL PLANNING AREA

Source: OESR Regional Profiles 2013
APPENDIX B  SEQ REGIONAL components IN BRIEF

Brisbane (C)
Coda LGA31000 (LGA)

People
- Male: 513,710
- Female: 528,129
- Median age: 34

Families
- Average children per family: 1.6

All private dwellings
- Average people per household: 2.6
- Median weekly household income: $1,547
- Median monthly mortgage repayments: $2,100
- Median weekly rent: $350
- Average motor vehicles per dwelling: 1.6

Brisbane is Australia’s third largest capital city and is centred along the Brisbane river on a low-lying floodplain. The population of Brisbane city is 1,110,473 (2012) and covers approximately 1,326 square kilometres. Brisbane is the economic powerhouse for Queensland and has seen consistent growth as a result of the resources boom. The top five industries in Brisbane are professional, scientific and technical services, health care and social assistance, retail trade, education and training and public administration. Population growth and the requirements of industry have seen the development of new markets such as high value professional services and niche manufacturing in recent years. Tourism is also an important part of Brisbane’s economy, being the third-most popular destination after Melbourne and Sydney for international guests. Popular tourist areas in Brisbane include South Bank, the Botanical Gardens, the Lone Pine Koala Sanctuary and Roma Street Parkland. Brisbane also has numerous shopping centres and retail areas, restaurants, art centres, museums, theatres and entertainment complexes.


Source: ABS QuickStats Census 2011
The **Gold Coast** is located about 78 kilometres south of Brisbane and is the second most populous city in the state and the most populous non-capital city in Australia. The Gold Coast covers an area of 1,379 square kilometres and has a population of 526,173 people. The Gold Coast is one of the fastest growing regions in the country with continued commercial and urban development, however tourism remains a fundamental element of the economy. Approximately 11 million people visit annually who contribute more than $4.1 billion to the city’s economy every year. The Gold Coast tourism sector employs about 35,300 people and attracts more than 10 million overnight and daytrip visitors each year. The Gold Coast possesses a wide range of natural attractions such as beaches, marine parks, navigable waterways, bushland and nature reserves, as well as a broad array of tourism services and infrastructure, including theme parks, restaurants, wineries, shopping and international golf courses. The tourism industry is also supported by a dedicated events program including the Super GP, ASP Quicksilver Roxy Pro Surfing, Pan Pacific Masters Games and in 2018 the Commonwealth Games.

The Moreton Bay region borders the Sunshine Coast region in the north, Brisbane City in the south, and the Somerset region in the west. The Moreton Bay area is a growing residential area, with substantial rural, rural-residential, commercial and industrial areas. The population of the Moreton Bay region is 400,036 (2012), and encompasses a total land area of 2,037 square kilometres, including mountain ranges, coastal wetlands, national parks, state forests, rural townships and urban centres such as Caboolture and Redcliffe. Rural land is used mainly for dairy farming, timber, beef cattle, mixed farming and growing tropical fruit. New residents and businesses are being attracted to the Moreton Bay Region due to its close proximity to Brisbane and the existence of major transport infrastructure making it easily accessible. Major industries in the region include retail, health care and social assistance, manufacturing, education and training, and construction. Highlights and attractions of the Moreton Bay region include browsing the Redcliffe markets, whale watching and sailing on the bay, visiting the Caboolture historical village and cycling the bikeways of the Redcliffe peninsula. Major events in the region include the Urban Country Music Festival, Woodford Folk Festival, and Abbey Medieval Festival.

The **Sunshine Coast** region is located about 95 kilometres north of Brisbane and is bounded by the Moreton Bay region in the south, and the Somerset region in the south-west. The Sunshine Coast region encompasses a total land area of 3,126 square kilometres and is home to 324,266 (2012) people. The Sunshine Coast area includes vibrant coastal towns, laid-back hinterland villages, a pristine 200 kilometre coastline, stunning waterways, and spectacular national parks and state forests. These natural attractions have contributed substantially to establishing the region as a recognised lifestyle and holiday destination. Highlights of the region include a wide variety of outdoor sports and recreational activities such as swimming, surfing, scuba diving, fishing, cycling and hiking, and visiting popular attractions such as Australia Zoo, the Ginger Factory, Under Water World and Aussie World. Tourism is the major industry on the Sunshine Coast and other industries related to tourism are strong performers including retail and construction. The Sunshine Coast is also emerging as a centre for entrepreneurial and innovative companies particularly in the ICT, and creative industry sectors.

Logan City is bounded by Brisbane and Redland Cities in the north, Gold Coast City in the east, the Scenic Rim Regional Council area in the south, and Ipswich City in the west and has easy access to the national highway and rail networks. Logan City covers over 957 square kilometres and has a population of 293,485 (2012). Logan City is a growing residential area, with substantial rural, rural-residential, commercial and industrial areas. Much of the rural area is used for dairy farming, cattle grazing and horse agistment and breeding. Logan city highlights include the Eagleby wetlands reserve, Daisy Hill koala centre and Berrinba wetlands, home to 430,000 new native plants, 100 nesting boxes for possums, gliders and birds and 8km of walking tracks. Although Logan is a modern city there are still many reminders of early settlers. Numerous historic cemeteries and pioneer buildings are located in the area. There are 20 original pioneer buildings at Old Beenleigh town and Mayes Cottage at Kingston. Other activities include go karting at Kingston, cable skiing and shopping at the Kingston Butter Factory which has a large collection of art and craft on display.

Redland City is about 26 kilometres from Brisbane and is bounded by Moreton Bay in the north, the Gold Coast and Logan Cities in the south, and Brisbane City in the west. Redland City has busy coastal villages, seaside parks and esplanades and historical towns such as Cleveland. Redland City has a population of 145,507 (2012) and encompasses a total land area of about 537 square kilometres, including islands, coastal areas, bushland, national parks and waterways. The major retail and commercial centres are located at Cleveland and Capalaba. Redland highlights include various conservation areas and wetlands such as the native botanic gardens at the Indigiscapes Centre, and the Eprapah Environmental Centre at Redland Bay. Popular tourist attractions include Sirromet Winery, Mount Cotton and the numerous beaches and outdoor activities available in areas such as Moreton Bay Marine Park, North Stradbroke Island and Blue Lake National Park. The southern areas of the city are more rural and rural-residential in nature. Major industries include retail, tourism, mining (North Stradbroke Island has been the site for sand mining for more than 60 years), horticulture, construction, poultry and specialist farming.

Ipswich is Queensland’s oldest provincial city and has many historical buildings and heritage trails. The capital city Brisbane is a 40 minute drive to the east and to the west are the rural and agricultural areas of the Lockyer Valley. Ipswich comprises an area of 1,090 square kilometres and has a population of 177,323 (2012) people. Ipswich preserves and still operates from many of its historical buildings and homes, with more than 6,000 heritage-listed sites. Ipswich also has over 5,000 hectares of parkland and conservation estates providing plenty of opportunities to picnic, hike, mountain bike and horse ride. The western rural areas of the city have a range of charming townships and attractions such as a ride in a replica stagecoach at Grandchester. The major industries in Ipswich are manufacturing, health care and social assistance and retail trade. The expansion of the Amberley Air Force Base as well as other projected developments such as the expansion of Ipswich Hospital and the University of Queensland Ipswich campus will provide significant population, employment and regional economic development within Ipswich.

Toowoomba is Australia’s largest inland city and is just over one hour’s drive west from Brisbane. It is situated 700 metres above sea level and has spectacular views over the Lockyer Valley. The Toowoomba region has a population of 157,669 (2012) and covers 12,973 square kilometres. The region’s rich volcanic soil provides an ideal location for its 150 leafy public parks and beautiful flowering garden beds. In spring Toowoomba is known for its carnival of flowers and the surrounding highlands provide spectacular walking tracks through rainforests and waterfalls. Toowoomba considers itself a major educational hub as it is home to the University of Southern Queensland with its large overseas student population, and is the primary location for secondary Boarding Schools with many Catholic, Independent and Christian Day and Boarding Schools. Toowoomba is also known for its army aviation base at Oakley which now provides an aviation training centre.

The Scenic Rim region is set in the foothills of the Great Dividing Range and surrounded by world heritage listed national parks, including ancient landforms, lush rainforests and impressive mountain ranges. It is about one hour’s drive south of Brisbane and west of the Gold Coast. The region covers 4,238 square kilometres and has a population of 37,780 (2012) people. It is a popular tourist destination offering flourishing country towns, wineries, art galleries, extensive bushwalking tracks and equine facilities. Main tourist attractions include the Tamborine Rainforest Skywalk, O’Reilly’s tree top walk, eco safaris and exploring the Lamington National Park. Its main towns include Beaudesert, Boonah, Canungra and Tamborine Mountain. The region’s primary businesses are agricultural/horticultural production, the equine industry and tourism/ecotourism. The Scenic Rim region contains more than 30,000 hectares of parkland, including national parks and council controlled parks.

The **Lockyer Valley** is about 3000 square kilometres with a population of about 34,954. It is located between two city centres Toowoomba city and Ipswich city and within 30 minute driving distance from each. The dominant industry sectors in the Lockyer Valley are agriculture, manufacturing, transport and logistics, retail and health and community services. The region is a large producer of grain, cotton, beef dairy products and pork and has a growing horticultural industry. The two main areas in Lockyer Valley are Gatton and Laidley, two well known growing regions for prime farm land. As such, the University of Queensland Gatton Campus is well known for its programs in animals, agriculture, food and environment. The area is the western corridors’ primary transport route via the Warrego Highway (A2) linking Australia’s capital cities and hence has become a major transport distribution hub. The Lockyer Valley is also known for the world’s finest sandstone product and many extraction industry businesses.

In 2008 the former Esk and Kilcoy shires amalgamated to form the **Somerset Region**. The region is located an hour west of Brisbane and has a strong focus on promoting the agricultural, environmental, and heritage features of the area. The Somerset region has an area of 5379 square kilometres, includes the main townships of Esk, Fernvale, Kilcoy, Lowood and Toogoolawah, and has a population of 23,137 (2011) people. The Somerset region is popular with tourists as it has native bushlands, beautiful scenery, a variety of lakes and rivers and extensive farming land. Somerset also contains the key water catchments for southeast Queensland, Lake Wivenhoe and Lake Somerset. These giant lakes are a recreational playground for anglers and water sport enthusiasts however they also offer numerous picnic and scenic spots for families to enjoy. Other leisure activities on offer in the Somerset region include experiencing farm life, horse-riding, bushwalking, mountain climbing and abseiling.

ABOUT THE AUTHORS

Professor Michael J Hefferan is Pro Vice-Chancellor (Engagement) and Professor of Property and Development at the University of the Sunshine Coast (USC) and is an Adjunct Professor at the Queensland University of Technology. He is also chair of the wholly-owned subsidiary of USC, the Innovation Centre Sunshine Coast.

Mike is chair of its National Education Board of the Australian Property Institute (API) and is a member of its Queensland Divisional Council where he was a past president. The API jointly published his book, Real property in Australia: Foundations and applications (2013).

For many years previously he was an executive director within the Department of State Development (Queensland), responsible for the Smart State Initiative, and delivery of a range of major projects. He is currently involved with research and project input on major public infrastructure, master planned communities and property taxation and mass valuation.

He has a PhD, Masters of Applied Science and postgraduate management qualifications. He is a registered urban and rural valuer and a fellow of the Australian Institute of Company Directors (AICD), Urban Development Institute of Australia (UDIA) and Royal Institute of Chartered Surveyors (RICS).

Dr. Pamela Wardner is Project Manager at the Office of Engagement. She was formerly an academic fellow in the School of Business at the University of the Sunshine Coast (USC), lecturing and tutoring in the Property Economics and Development and Economics for Business courses and is involved in various research projects in the subject area.

Prior to her academic role, Pam was involved in significant property development projects within the private sector. She is still an active industry professional with her company, Wardner Developments, involved in projects on the Sunshine Coast and adjacent regions.

Pam has a PhD, a Masters in Business Management and a Bachelor of Science in Commerce majoring in Finance Economics. Her research interests are urban economics, economic geography, master planned communities, firm location and sense of place.
This page intentionally left blank.