



# A commentary on the Greater Sunshine Coast economy

## June 2014

This report provides an overview and commentary on the Greater Sunshine Coast economy which includes Noosa Shire as of mid-2014. A sound evidence base is critical for rational decisions for businesses, investment and economic planning. There is a range of sources used in this summary including the Sunshine Coast Council's (SCC) recent acquisition of the Informed Decision's ('.id') databases. These set important parameters for the now-operational *Regional Economic Development Strategy 2013–2033* and into the future.

The specific data provided here needs to be put into a wider context, particularly noting that:

- Anecdotal observations that, economically, the Greater Sunshine Coast is a significantly different region are largely incorrect – many of its characteristics are fairly typical of major peri-urban Australian regions. However, the rate of aging in the community and the relatively low levels of median household income deserve closer attention.
- While recent trading conditions have been difficult, the regional economy has weathered the global financial crisis reasonably well without significant sector failures or asset devaluations. This provides a stable base for the future.
- Economic performance in the medium to longer term is influenced largely by demographics and population growth. A return to significant levels of in migration and an increased median population age can be anticipated and should be addressed positively.
- The Greater Sunshine Coast economy has significant potential to widen its sectoral base – particularly in areas of health, education and professional services with a significant shift from service to trading activities wherein comparative advantage exists.
- There are few competitive advantages of manufacturing on the Greater Sunshine Coast, but the wider opportunities in tourism, agribusiness, health, education, professional services and 'knowledge industry' development must be embraced.
- Micro, small and medium enterprises comprise 96% of Greater Sunshine Coast businesses, and leadership by the few large private and public institutions will be vital

to ensure an integrated strategy that focuses primarily on the attraction of new investment, building principally on existing strengths.

- The Greater Sunshine Coast is not a commuter zone (unlike the regions adjacent to Brisbane). With a more mature relationship with Brisbane, the Sunshine Coast can position itself as the 'third node' of South-East Queensland – along with the state capital, Brisbane, and the Gold Coast.

The Greater Sunshine Coast remains an aspirational place – based on the natural features of the region and less quantifiable characteristics such as lifestyle, security and environmental protection. The health and resilience of the economy must be seen as integral to the overall wellbeing of the entire region. There are direct links between prosperity and civil society, the rule of law, liveability, education and environmental protection – and those relationships are in fact two-way.

There are six major areas discussed in this commentary, namely:

- gross regional product and household income
- population and demography
- sector performance
- education and skills development
- development, construction and infrastructure
- tourism and hospitality

While tables and graphs are presented alongside each of these areas, they are not necessarily discussed in-text but are provided to give the reader an appreciation of key indicators.

**Table 1 Greater Sunshine Coast key economic measures**

| Performance indicators                            | Size      | Trend             |
|---|-----------|-------------------|
| Estimated resident population <sup>1</sup> (2013) | 330 498   | +2.4% (2003-13)   |
| GRP <sup>2</sup> (2013)                           | \$13 679m | +1.5%(2012-13)    |
| Employed residents <sup>2</sup>                   | 146 745   | -0.89% (2012-13)  |
| Unemployment <sup>1</sup>                         | 5.8%      | -18% (2011-13)    |
| Building approvals <sup>1</sup> (2012-13)         | \$ 1,741m | +97%(FY13 - FY12) |

1 Source: OESR Regional profile

2 Source: Economy.id

3.Source: OESR Regional Profile however the large increase is an aberration mainly due to the hospital projects as discussed in Figure 12, page 7.

**Figure 1**  
Sunshine Coast - Gross Regional Product



Source: National Institute of Economic and Industry Research (NIEIR) ©2014  
Compiled and presented in economy.id by .id the population experts

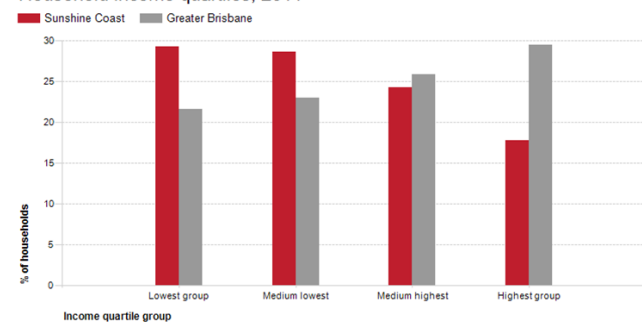
\* Local Residents GRP refers to the economic output of the residents of the area regardless of where they work. It is best thought of as the income received by people in the City. If the Residents GRP is high relative to the Local Industry GRP, this indicates that residents are contributing their economic productivity to other areas (most likely commuting out).

**Table 2 Sources of Income per household 2012/13**

| Area                   | Total disposable income 2012/13 | % difference | Ratio of cash benefits paid |
|------------------------|---------------------------------|--------------|-----------------------------|
| Greater Sunshine Coast | 105,534                         | base         | 1.93                        |
| SEQ                    | 120,865                         | 12.68%       | 0.96                        |
| Queensland             | 117,303                         | 10.03%       | 0.98                        |
| Australia              | 119,721                         | 11.85%       | 0.77                        |

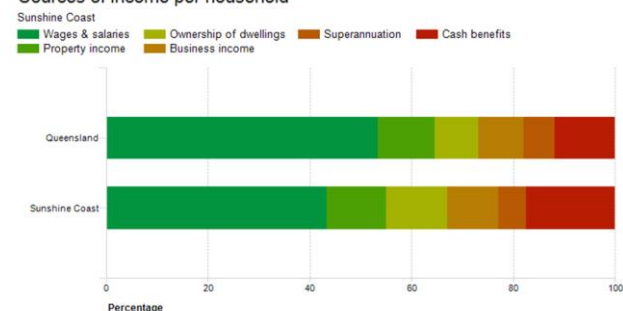
Source: Economy.id

**Figure 2**  
Household income quartiles, 2011



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 (Usual residence data)  
Compiled and presented in profile.id by .id the population experts

**Figure 3**  
Sources of income per household



Source: National Institute of Economic and Industry Research (NIEIR) ©2014  
Compiled and presented in economy.id by .id the population experts

## Gross regional product and household income

The figures in Table 1 show positive and negative variants; however, they are not over a sufficient time period to be significant and considerable time lags also exist. Longer trend data now being collected will improve that level of knowledge.

Gross regional product (GRP) is a well-recognised measure and will continue to be used. However, its true definition and measurement is difficult particularly for a peri-urban region like the Greater Sunshine Coast, located in close proximity to a very large urban centre, Brisbane. In such cases, economic as well as geographic boundaries are porous and natural economic and trading activities make measurements inexact.

In many ways, Resident GRP represents a much better measure of wealth and prosperity. As an example, Figure 1 shows Resident GRP of the Sunshine Coast LGA only. It is important to note that household disposable income in SEQ averages 12.7% more than that of the Greater Sunshine Coast – while the Australian average registers 11% more. These variations are significant to regional economic development.

Sources of income between the two LGAs - Sunshine Coast and Noosa have a minor difference, which is reflected mostly in the ownership of dwellings. This however does not change the level of disposable income as shown in Table 2.

Falling labour force participation to some extent reflects the aging population but appears to be of concern as shown in Figure 10 on page 5. The Sunshine Coast Council is correct in attempting to focus on increasing the average disposable household income. In turn, this will be achieved by increasing labour participation rates and productivity and, hopefully, bring down the ratio of cash benefits (Figure 3) paid as well.

**Table 3**

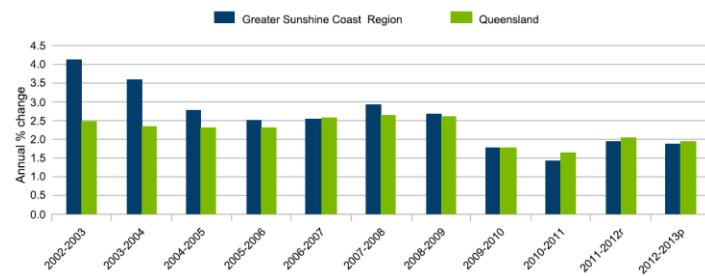
Estimated resident population by LGA, Greater Sunshine Coast and Queensland

|                                      | As at 30 June    |                  |                  | Average    |            |
|--------------------------------------|------------------|------------------|------------------|------------|------------|
|                                      | 2003             | 2008             | 2013p            | 2003-2013p | 2008-2013p |
|                                      | — number —       |                  |                  | — % —      |            |
| <b>Greater Sunshine Coast Region</b> | <b>260,994</b>   | <b>300,400</b>   | <b>330,498</b>   | <b>2.4</b> | <b>1.9</b> |
| Noosa (S)                            | 44,359           | 48,999           | 52,409           | 1.7        | 1.4        |
| Sunshine Coast (R)                   | 200,884          | 251,401          | 278,089          | 2.5        | 2.0        |
| <b>Queensland</b>                    | <b>3,743,121</b> | <b>4,219,505</b> | <b>4,656,803</b> | <b>2.2</b> | <b>2.0</b> |

Source: ABS 3210.0 Regional Population Growth Australia 2012-13 and Queensland Treasury and Trade Estimates

**Figure 4**

Estimated resident population growth, Greater Sunshine Coast and Queensland



Source: ABS 3218.0, Regional Population Growth, Australia, 2012-13 and Queensland Treasury and Trade estimates

**Table 4**

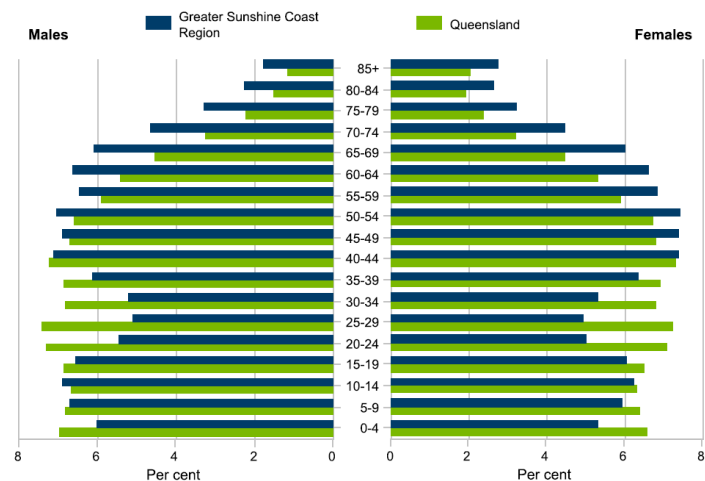
Estimated resident population by age and LGA, Greater Sunshine Coast and Queensland

|                                      | Age group      |             |                |             |                  |             |                  |             |                |             |
|--------------------------------------|----------------|-------------|----------------|-------------|------------------|-------------|------------------|-------------|----------------|-------------|
|                                      | 0-14           |             | 15-24          |             | 25-44            |             | 45-64            |             | 65+            |             |
|                                      | number         | %           | number         | %           | number           | %           | number           | %           | number         | %           |
| <b>Greater Sunshine Coast Region</b> | <b>60,024</b>  | <b>18.5</b> | <b>37,322</b>  | <b>11.5</b> | <b>77,052</b>    | <b>23.8</b> | <b>89,633</b>    | <b>27.6</b> | <b>60,235</b>  | <b>18.6</b> |
| Noosa (S)                            | 9,265          | 17.9        | 5,110          | 9.9         | 10,839           | 21.0        | 16,051           | 31.0        | 10,429         | 20.2        |
| Sunshine Coast (R)                   | 50,759         | 18.6        | 32,212         | 11.8        | 66,213           | 24.3        | 73,582           | 27.0        | 49,806         | 18.3        |
| <b>Queensland</b>                    | <b>907,035</b> | <b>19.9</b> | <b>633,335</b> | <b>13.9</b> | <b>1,289,071</b> | <b>28.2</b> | <b>1,127,456</b> | <b>24.7</b> | <b>608,632</b> | <b>13.3</b> |

Source: ABS 3235.0, Population by Age and Sex, Regions of Australia, 2012 and Queensland Treasury and Trade estimates

**Figure 5**

Estimated resident population by age and sex, Greater Sunshine Coast Region and Queensland, 30 June 2012p



Source: ABS 3235.0, Population by Age and Sex, Regions of Australia, 2012 and Queensland Treasury and Trade estimates

## Population and demography

To a considerable extent, demography is regional destiny. There are many variables that determine the region's future but population characteristics, together with birth and death rates set fundamental parameters for the region and the nation.

The Australian population is aging as in practically all OECD nations; however, as shown in Table 4, the population of the Greater Sunshine Coast has a higher proportion of seniors than for Queensland as a whole. This is not surprising and the trend will continue given the aging of the region's own baby boomers and the migration of others (as they reach retirement age) to a relatively warm, aspirational region such as this. In times past, aging had significant issues and challenges but for a region such as the Greater Sunshine Coast the situation has more positive than negative features.

Some important characteristics of the upcoming seniors (baby boomer generation) are:

- They represent approximately a quarter of the population but control more than 50% of the nation's wealth. While that wealth is not evenly distributed, significant numbers who will move to the Sunshine Coast will have substantial funds.
- Many are well educated and skilled and, unlike many of the current retiree population, are generally healthy and will remain productive for some decades.
- Even if future health challenges arise within this generation, the health-related concerns are national and state issues. Quite pragmatically, there will be new industries and services emerging to support this aging cohort in areas where they congregate.

The proportion of the current population over 60+ will certainly rise as this baby boomer generation reaches retirement and/or are dislocated because of industry and government restructure elsewhere. Increasing house price differentials between southern capitals and the Greater Sunshine Coast will play an important role. There is remarkable opportunity in the Greater Sunshine Coast's positioning of its economy, services, housing types and community services to maximise opportunities for the 'new aged'. This needs a more deliberate approach.

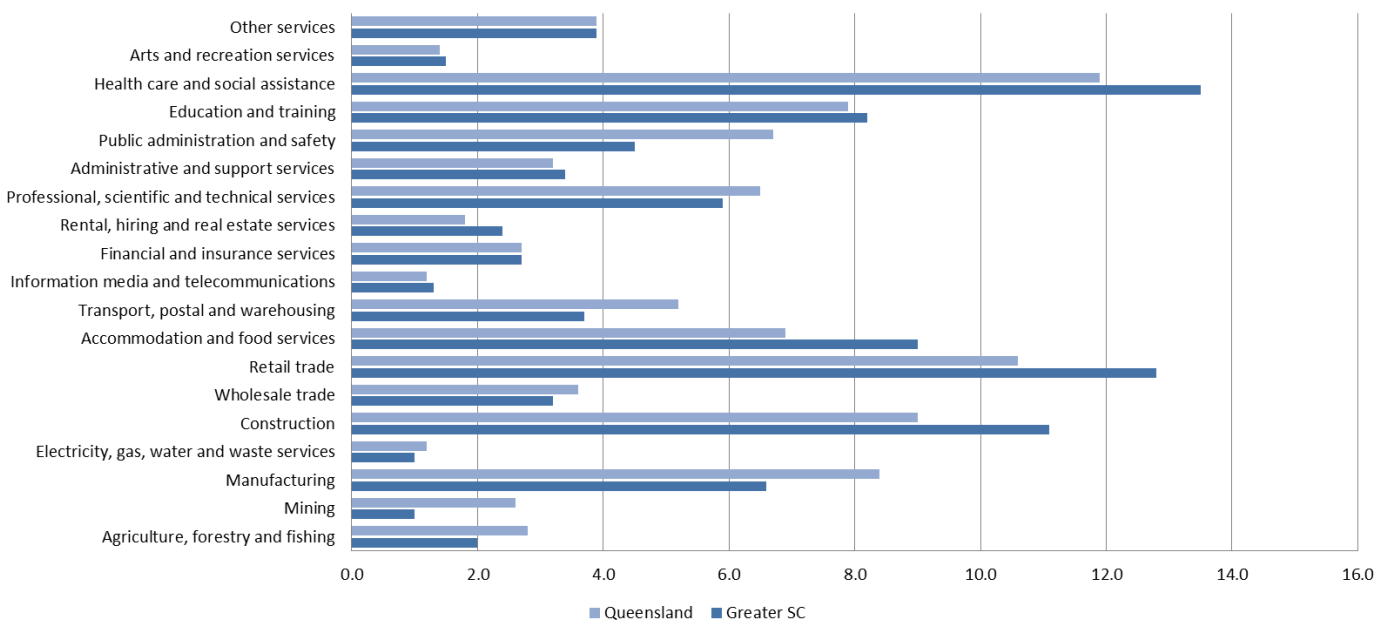
## Sector performance

Much is made of the Greater Sunshine Coast's reliance on its narrow economic base, composed primarily of development and construction, tourism and services – particularly retail. While this is a reasonable observation, it certainly is not abnormal for Australian regions – in fact many have an even narrower base. Probably of greater concern is that the key sectors, in the case of development and construction, are reactionary to the economic activity and changes in the population supports – tourism and retail are largely discretionary and in part seasonal. A widening of the economic base to include less cyclic, more innovative and trading sectors, specifically health and education can fundamentally address this concern.

Regions that do well are typified with resilient and sustainable economies because of their level of diversity. Reliance on mainstream sectors that are susceptible to seasonal variations or large single employers will always be precarious. On this basis, Newcastle, Townsville and the Gold Coast are typically more resilient than, say, Cairns, Wollongong and Geelong who have much narrower economic bases. Regions in peri-urban areas or within easy commutes of the main cities typically grow more soundly and indeed are now responsible for a vast percentage of the country's growth.

Figure 6

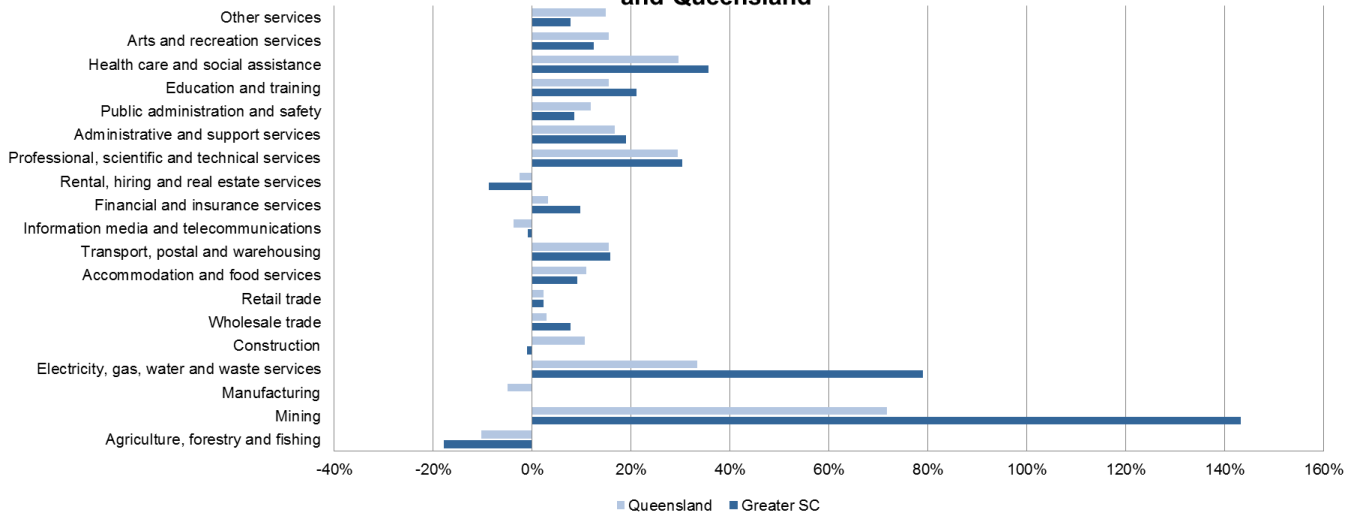
### Employment by industry (% of the employed) Greater Sunshine Coast and Queensland



Source: Source: ABS, Census of Population and Housing, 2011, Time Series Profile - T33 (enumeration) and Queensland Treasury and Trade estimates

Figure 7

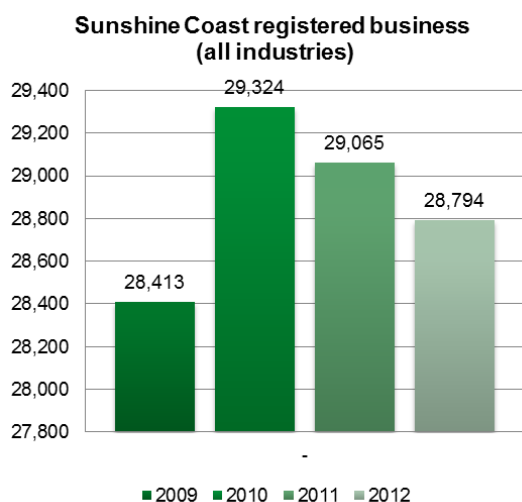
### Percentage change employment by total industry (% change) 2006-2011, Greater Sunshine Coast and Queensland



Note: These percentage changes need to be taken in context. They are of vastly different existing employment bases - refer Figure 6 above.

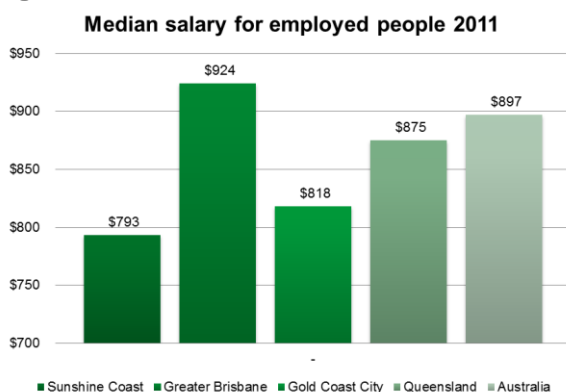
Source: Source: ABS, Census of Population and Housing, 2011, Time Series Profile - T33 (enumeration) and Queensland Treasury and Trade estimates

Figure 8



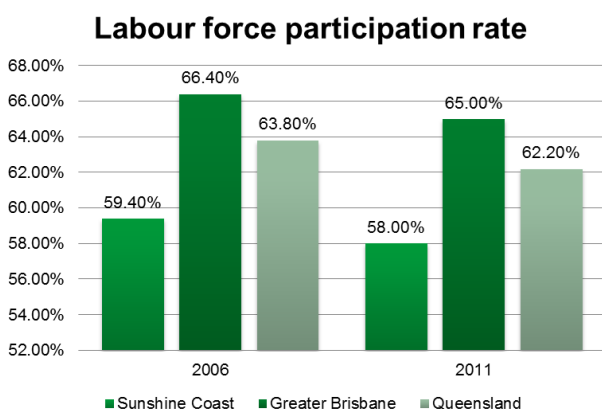
Source: Economy.id (Sunshine Coast region)

Figure 9



Source: Atlas.id (Sunshine Coast region)

Figure 10



Source: Atlas.id (Sunshine Coast region)

Rather than simply considering sectors by name and activity, more regard needs to be given to the following:

- The attraction of fixed investment capital is an absolutely critical underpinning to the advancement of a region both for new and existing ventures.
- The 'investment criteria' are similar for practically all sectors – namely, overt leadership by government, a 'can do' attitude by authorities, conducive regulatory regimes, a skilled workforce and a desirable urban setting that reflect environmental, community and social sensitivities. Provided with that, the private sector would feel free to pursue legitimate commercial investment profits – the source of most sustainable jobs.
- Skilled and industry-ready workforce that focuses on the inclusion, skills development and education of those entering the workforce and the retraining of the 'new aged'.

Fundamental to regional economic analysis also is the now well accepted concept of 'trading' and 'non-trading' sectors. Contemporary regional economies are in practice, segregated into two components: (1) The trading sector is made up of businesses that earn significant amounts of income from sources external to the region. Typically they are certain primary industries, manufacturing, technological development, education (in part), health (in part), tourism and individual commuters (as their labour is 'sold' to other areas). These sectors, firms and individuals earn 'new' money. A healthy region is one that would be earning at least 20% from those trading activities. That percentage however depends on levels of productivity and capital investment. (2) The non-trading sector is comprised of businesses that sell services inside the region.

The relationship between these two groupings is constantly changing. The number of jobs created in the trading 'export' group is smaller; they are typically the ones that create innovation, are much more productive, and generate jobs back into the local services sectors. Extensive studies in the US emphasise the importance of education and entrepreneurial/innovative environment for that first group. These studies also suggest that the creation of a single job in those trading sectors has a remarkable multiplier (between four and five). Even though the bulk of jobs will reside within service sectors, they cannot of themselves lead the economy. Therefore, based on the above discussion, economic development efforts would best be utilised in the development of those trading sectors.

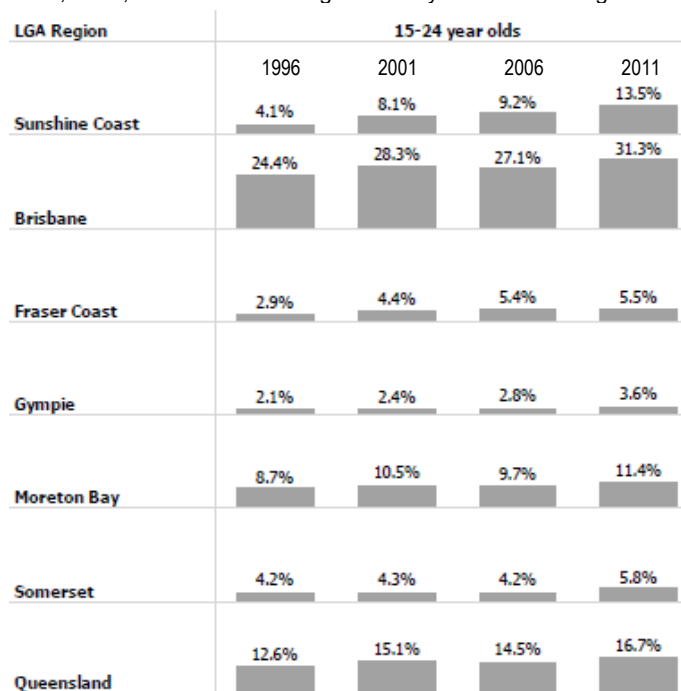
The context of all of this is one characterised by workforce mobility with linkages and networks into national and global markets. The environment is extremely competitive with labour and capital highly mobile. The value-add for governments is to truly create a conducive business setting for both existing and incoming businesses, and investors are to promote that from the highest levels. Leadership, partnerships and unity of purpose across the region are critical to that outcome.

**Table 5**  
Non-school qualifications by level of education, Greater Sunshine Coast Region and Queensland

|  | Census year      |              |                  |              |                  |              | Total change   |             |
|--|------------------|--------------|------------------|--------------|------------------|--------------|----------------|-------------|
|  | 2001             |              | 2006             |              | 2011             |              | 2001–2011      |             |
|  | number           | %            | number           | %            | number           | %            | number         | %           |
| <b>Greater Sunshine Coast Region</b>     |                  |              |                  |              |                  |              |                |             |
| Bachelor degree or higher <sup>(a)</sup> | 18,065           | 20.3         | 27,058           | 22.3         | 36,558           | 25.9         | 18,493         | 102.4       |
| Advanced diploma or diploma              | 12,611           | 14.2         | 18,331           | 15.1         | 23,216           | 16.4         | 10,605         | 84.1        |
| Certificate <sup>(b)</sup>               | 35,522           | 39.9         | 46,216           | 38.1         | 55,641           | 39.4         | 20,119         | 56.6        |
| <b>Total<sup>(c)</sup></b>               | <b>89,097</b>    | <b>100.0</b> | <b>121,316</b>   | <b>100.0</b> | <b>141,314</b>   | <b>100.0</b> | <b>52,217</b>  | <b>58.6</b> |
| <b>Queensland</b>                        |                  |              |                  |              |                  |              |                |             |
| Bachelor degree or higher <sup>(a)</sup> | 305,628          | 25.1         | 414,210          | 25.9         | 557,837          | 29.2         | 252,209        | 82.5        |
| Advanced diploma or diploma              | 156,001          | 12.8         | 208,950          | 13.1         | 265,485          | 13.9         | 109,484        | 70.2        |
| Certificate <sup>(b)</sup>               | 451,525          | 37.1         | 564,538          | 35.3         | 696,361          | 36.5         | 244,836        | 54.2        |
| <b>Total<sup>(c)</sup></b>               | <b>1,218,416</b> | <b>100.0</b> | <b>1,597,725</b> | <b>100.0</b> | <b>1,907,433</b> | <b>100.0</b> | <b>689,017</b> | <b>56.6</b> |

Source: OESR Regional profiles - time series

**Figure 11**  
Education statistics by Local Government Area (LGA) Census 1996, 2001, 2006, 2011 – Students aged 15-24 year old attending university



Source: USC Strategic Information and Analysis Unit

## Education and skills development

The education sector (broadly defined as schools, vocational and tertiary institutions) is of fundamental importance to a contemporary regional economy for a range of reasons – not simply because of the stable, relatively high-value jobs created and the asset base it creates, but more widely, because it underpins a more coherent and knowledgeable community and provides it with work-ready skills. Tertiary education is critical to contemporary leading-edge sectors and helps retain younger generations, or at least slow down leakage, to other centres. Between 2001 and 2011, the share of persons with a bachelor degree or higher in Greater Sunshine Coast Region increased from 20.3% to 25.9% as seen in Table 5.

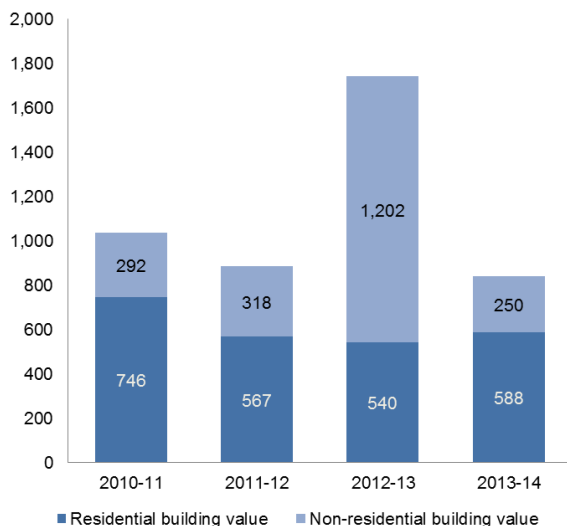
Independent studies show that students lost to the region for tertiary education elsewhere rarely return, so causing the 'hollowing out' of the 20–35 year age group typically besetting many Australian regions.

Compared with most other regions, the Greater Sunshine Coast already has a disproportionately high education sector. It has its own comprehensive university and a range of private schools and public secondary schools recognised of very high quality. This represents a significant comparative advantage for this region which can be further expanded with international students and by drawing additional local students' – particularly from Brisbane's northern corridor.

The University of the Sunshine Coast (USC) together with the Central Queensland University's presence in Noosa provide the majority of courses required of tertiary students in the region. Furthermore, the new university public and private hospitals provide opportunities for significant expansion into these growing areas. USC is only 18 years old and, while it continues to grow strongly, it remains undersized to service its catchment area. (By comparison, the much older University of Wollongong, servicing the comparatively sized Illawarra is almost three times the size of USC.) Further tertiary growth is essential, particularly as USC ramps up its course offerings (which now include medical sciences, law, engineering, education and others) and its areas of research (medical science, sports medicine, sustainability and genomics). Also, the integration of the university activities with the community through initiatives such as Innovation Centre Sunshine Coast, work placements and work-integrated learning is vital. Further crucial development in this sector here are not simply the responsibilities of universities, TAFE and other education providers but require support of government (at all levels), business and the wider community.

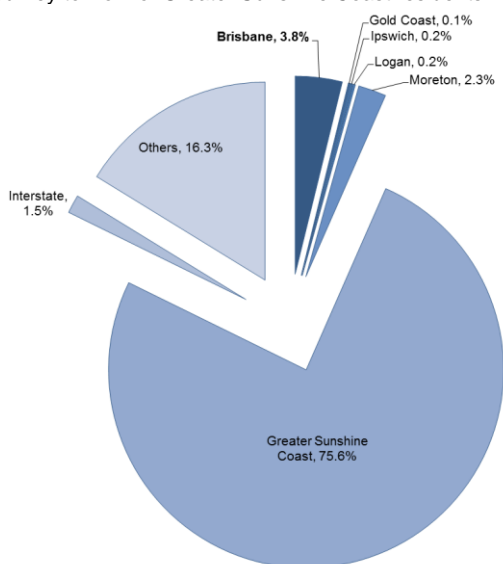
The benefits from improvement in graduate education by the presence of a local university are clearly demonstrated in Figure 11. Even though these represent outstanding results they are still well below the comparative statistic of 31% for Brisbane.

**Figure 12**  
Value of building approvals, Greater Sunshine Coast



Source: OESR Regional profiles

**Figure 13**  
Journey to work of Greater Sunshine Coast residents 2011



Source: OESR Journey to work by origin and destination, statistical area level 4 (SA4), Queensland, 2011

**Table 6**  
Journey to work of Greater Sunshine Coast residents count 2011

| Works in               | Lives in Greater Sunshine Coast | % to Total    |
|------------------------|---------------------------------|---------------|
| Brisbane               | 5,187                           | 3.8%          |
| Gold Coast             | 178                             | 0.1%          |
| Ipswich                | 267                             | 0.2%          |
| Logan                  | 215                             | 0.2%          |
| Moreton                | 3,074                           | 2.3%          |
| Greater Sunshine Coast | 102,179                         | 75.6%         |
| Interstate             | 2,023                           | 1.5%          |
| Others                 | 21,950                          | 16.3%         |
| <b>Total</b>           | <b>135,073</b>                  | <b>100.0%</b> |

Source: OESR Journey to work by origin and destination, statistical area level 4 (SA4), Queensland, 2011

## Development, construction and infrastructure

There are no comprehensive statistics on public or private infrastructure; however, the following general observations are made.

With regards to public infrastructure the development of the Sunshine Coast Public and Private Hospital (\$2 billion) and the university capital works (\$55 million) amongst others are having a dramatic direct and indirect effect. Figure 12 shows how construction activity has increased based largely on these major developments. Land sales and housing starts are beginning to register slight improvement. However, available affordable land supply needs to be encouraged for significant recovery into the future.

Other public infrastructure, particularly in transport, is at an unacceptably low standard – urgent needs are duplication of the rail lines to Brisbane and the widening to a six-lane carriageway of the Bruce Highway. Again, these matters need to be considered in context.

There is no doubt that the status of the Bruce Highway is dangerous, inadequate and detrimentally affects trade. Tourism, 'drive-in' trade and day trips from Brisbane are particularly affected. It needs to be noted, however, that the Greater Sunshine Coast is not a commuter zone with only 4% travelling daily to south of the Pine River for work as shown in Figure 13. Traffic congestion towards Brisbane often starts in the commuter zone (south of Caboolture). While the widening is essential for the reasons mentioned above, it would not overly affect commuter habits.

The duplication of the rail line, however, will significantly change the workforce and workforce mobility in the Sunshine Coast with growing population in Caloundra and Caloundra South being able to commute to work into North Brisbane and the CBD. (By way of example, more than 30 000 commuters a day move by rail from Geelong to Melbourne or from Gosford to Sydney returning valuable income for the region in which they live.) While both transport modes are urgently required, the rail duplication will have a greater, beneficial effect on the workforce and the prosperity of the region.

The region has embarked on progressing with two other major infrastructure projects: the Sunshine Coast Airport development and a principal activity centre at Maroochydore (probably including a cultural and convention centre). Both of these are of fundamental importance and must continue to be pursued with an understanding that:

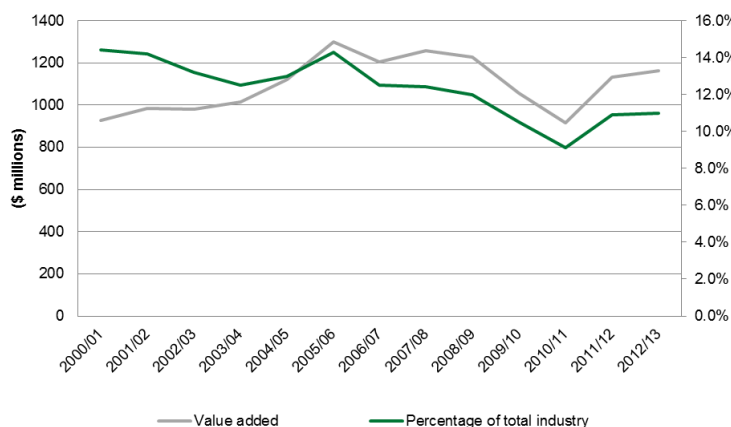
- these are long-term projects where a united voice is essential
- excellent upfront strategic planning must be put in place to be ready to seize opportunities that arise
- such projects are fundamentally about the attraction of private capital, and safe but innovative structures and vehicles would be needed to achieve required outcomes.

**Table 7**  
Tourism profile 2012/13 Greater Sunshine Coast

| Visitors to Sunshine Coast | Expenditure | Visitors | Nights | Average stay | Average trip expenditure | Average nightly expenditure |
|----------------------------|-------------|----------|--------|--------------|--------------------------|-----------------------------|
|                            | \$ million  | '000     | '000   | Nights       | \$                       | \$                          |
| Domestic day               | 542         | 5,993    | np     | np           | 90                       | np                          |
| Domestic overnight         | 2,076       | 2,667    | 10,919 | 4            | 778                      | 190                         |
| International              | 171         | 223      | 2,408  | 11           | 767                      | 71                          |

Source: Tourism Research Australia 2013 Regional Profile Sunshine Coast

**Figure 14**  
Value of tourism & hospitality vs percentage of total industry



Source: Economy.id Sunshine Coast

## Tourism and hospitality

The Sunshine Coast with its natural features remains among the top preferred tourist destinations in Queensland.

In 2012/13, the total tourism and hospitality sales in the Greater Sunshine Coast were \$2.78 billion as seen in Table 7. Their value-adds to the economy account for approximately 11% of total value and 13.5% of full time employment.

The value of this sector was not as well represented in the past because of the makeup of the traditional industries. However, the direct and indirect benefits of this sector should not be overlooked as tourism remains as the front window of the region.

## Sources of data

This commentary provides economic snapshots of the Greater Sunshine Coast region which includes the local government areas of the Sunshine Coast Council and Noosa Shire. The sources of data came from several sources: Office of Economic and Statistical Research, Informed Decisions (.id) databases and Australian Bureau of Statistics (ABS). Principal data sets are from the 2011 Census, as upgraded subsequently. In recent times, the Sunshine Coast Council has, on the recommendation of USC, invested in Economy.id and Atlas.id, which complements their earlier investment in Profile.id.

The databases bring together current statistical information from the ABS and economic models by the National Institute of Economic and Industry Research (NIEIR) and represent a critical step forward, providing contemporary, holistic and easily interpreted database for the region. Importantly also, the Informed Decisions ('.id') databases are now used by a large number of local authorities across Australia and therefore can also provide important comparative analysis. It can be accessed through [www.home.id.com.au](http://www.home.id.com.au).

The de-amalgamation of Noosa created some short-term statistical difficulties; while all data from any source will have a two to three month lag time, the .id platforms will prove invaluable to the Sunshine Coast over time. Without those measures of key economic determinants available (and able to be applied longitudinally and in comparison with other regions), meaningful economic development and management has little context and/or measurement.

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