Regional Development Australia
SUNSHINE COAST INC

SUNSHINE COAST

Regional Roadmap 2012-31

An Australian Government Initiative

Queensland Government

Acknowledgements

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The RDA Sunshine Coast Committee is the driving force behind the strategic intent of this Sunshine Coast Regional Roadmap. The committee consists of Prof Max Standage (Chair), Malcolm (Mick) Graham OAM (Deputy Chair), Steve Fromont (Treasurer), Beth Berghan (Secretary), Prof Johanna Rosier, Alexina Johnson, Prof Mike Hefferan and John Sargent.

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FROM THE CHAIR OF REGIONAL DEVELOPMENT AUSTRALIA SUNSHINE COAST

The *2012-31 Regional Roadmap* for the Sunshine Coast has drawn on the inputs from key organisations, regional leaders and all levels of government to advocate a vision for the Sunshine Coast as being an innovative, dynamic, connected and sustainable region.

The proposed overall strategic direction is designed to address the significant challenges and opportunities that face the Sunshine Coast, which is a maturing and successful region, rich in natural, capital and human assets and a strong identity that has national and international recognition.

The region's outstanding natural assets and enviable lifestyle have been the basis behind significant population growth. Its capital assets are growing and the development of the Sunshine Coast University Hospital offers a significant opportunity, amongst other projects. However, the region's greatest asset is the committed, passionate and highly skilled people who are willing to make a difference. It is through their efforts that we will prosper as a region.

Collaboration and partnership will be critical to the continuing success of the Sunshine Coast and a critical feature of the *Roadmap.*

It is through collaboration and partnership with community and business groups and all three levels of government, that all stakeholders can participate in discussion, debate the issues and play a role in determining the priorities that will drive the future prosperity of the region.

The development of the *Roadmap* is a journey, a work-in-progress that reflects contributions from organisations and key community leaders from across the region in articulating a vision and an overall strategic direction for the Sunshine Coast. The Regional Development Australia Sunshine Coast Committee and staff are proud to take part in this journey.

Together, we have an enormous opportunity as a region to prosper and create "game-changing" initiatives that will have significant impact in the coming years.

Max Standage

Prof Max Standage
Chair
Regional Development Australia Sunshine Coast

Executive Summary

The *2012-31 Regional Roadmap* provides an overview of the Sunshine Coast economy in a **State of the Region report** and outlines the **Priority Focus Areas** that Regional Development Australia Sunshine Coast can implement in collaboration with industry leaders and organisations.

The priority focus areas have been developed over time in collaboration with a variety of organisations including the business community, all three levels of government, education/research providers and community groups.

Informing the development of these priorities has been the Regional Development Australia Sunshine Coast vision for the region: **A Sunshine Coast that is innovative, dynamic, connected and sustainable.**

To achieve this vision, the Regional Development Australia Sunshine Coast's mission is to connect people across the Sunshine Coast region to strengthen business growth, generate innovative environmental solutions and enhance community development.

Regional Priorities

A partnership approach is critical to success; Regional Development Australia Sunshine Coast recognises the various roles that community leaders, various government departments and community groups play alongside each other to achieve a common vision.

More than 50 distinct and separate collaboration and consultation activities have been undertaken over the past 12 months to ensure a thorough understanding of the roles and activities undertaken by each community group.

This has resulted in the development of four priority focus areas for Regional Development Australia Sunshine Coast:

Focus area 1: Nurture high potential economic development sectors. Prioritise large-scale projects that will have a significant flow-on affect into the broader Sunshine Coast community.

Opportunity: Fast track and optimise major projects such as the Sunshine Coast University Hospital and the Agri-Food Sector Value Chain project that will have far reaching benefits across the entire Sunshine Coast community.

Challenge**:** Due to the large scale and multi-stakeholder complexity of these projects the challenge will be to create timely outcomes that best represent the community's interests.

RDA Sunshine Coast role**:** Facilitate a community vision and optimise community commitment towards achievable and timely outcomes. To also influence investment and policy decisions that best represent communities of interest and the region as a whole.

Focus area 2: Advocate for the delivery of infrastructure. Provide evidence-based support for key infrastructure projects that will give government the confidence to invest in a timely manner, for the long-term benefit of the region.

Opportunity: Secure funding and the timely implementation for large strategic infrastructure projects for the Sunshine Coast.

Challenge: Navigate competing priorities and funding requests for the region and galvanizing community support behind strategic high priority projects that will have long-term benefit.

RDA Sunshine Coast role**:** Be a trusted advisor to government by providing relevant, accurate and timely input into policy debates. Help best represent the community's interests through a partnership approach.

Focus area 3: Advancing business and society through technology. Capturing the unique opportunity of broadband and information technology development to further the economic and social wellbeing of communities across the Sunshine Coast region.

Opportunity: The Sunshine Coast can become a leader in new technology deployment and innovation through collectively imagining and creating new opportunities using tomorrow's technology, today.

Challenge: Articulating and implementing the Sunshine Coast 'Digital Futures' vision in a timely manner to gain regional advantage, as many other regions across Australia are competing to become leaders in this area.

RDA Sunshine Coast role**:** Accelerate the dialogue and capture the community's vision to underpin confidence towards investment and implementation of that vision.

Focus area 4: Workforce and employment. Ensuring our region has a skilled and ready workforce to meet changing demands.

Opportunity: Position the Sunshine Coast region to best meet the needs of future labour demand.

Challenge: The Sunshine Coast will have a continued population growth above the average for Queensland and Australia. Industries will also change, resulting in changing demand for labour.

RDA Sunshine Coast role**:** Partner with community leaders to help lead the agenda and invest in research to inform strategic planning.

Underpinning these focus areas are the principles of environmental sustainability, social justice and inclusion.

State of the Region

In addition to community consultations and collaborations, Regional Development Australia Sunshine Coast has provided an in-depth overview of the region, its people, lifestyles, employment, businesses and the threats and opportunities, using latest data from a variety of sources including the Australian Bureau of Statistics (ABS).

This information has been put together in a **State of the Region** format which underpins and informs Regional Development Australia Sunshine Coast's priority focus areas and projects.

In summary, the research and statistics show a complex and mature local economy with a variety of challenges and opportunities.

The region has had strong population growth over the years; however this growth has recently slowed. The key message is that the region is still expected to have strong population growth in the future, although not to the same volumes as previously predicted.

This population growth has been serviced in the past by traditional residential services sectors such as retail and construction. The tourism sector has also played a strong and influential role in the local economy to date.

An overwhelming theme has emerged from the **State of the Region** summary: the identification of a variety of 'building blocks' of the local economy going forward, i.e. the industry sectors or enabling technologies that have significant influence over our current and future prosperity aspirations.

The industry sectors identified are summarised in the diagram below and include Construction, Tourism, Health, Mining, Agribusiness and Food. Also included in this list are the technological and digital frameworks required to enable these industry sectors.

Construction	• **Construction** is the third largest employer (employing 18,900 workers on the Sunshine Coast in 2012) and a major contributor to the local economy. • The Sunshine Coast economy heavily relies on the construction sector due to the past (and future) population growth and the need to service residential demand.
Tourism	• **Tourism** is a key driver of the Sunshine Coast economy, contributing to both the accommodation and food service sectors and, in part, the retail sector and supporting professional services. • 8.2 million trips were made to the Sunshine Coast in the year to March 2012, of which 35% were domestic overnight visitors, 63% were domestic day trippers and 2% were international visitors.
Health	• The **Health** sector is growing at a rapid rate, and one of the largest sectors on the Sunshine Coast. With more than 20,000 people employed it is the second largest employer after the retail sector. • The 'business of health' provides employment and private enterprise opportunities, and services a growing (and ageing) population. The new University Hospital is a catalyst for enormous opportunity.
Agribusiness & Food	• **Agribusiness and Food** play a strong role on the Sunshine Coast. The state-wide food value chain is estimated by the Queensland Government to contribute $18.7 billion pa to the Qld economy, including 267,000 jobs. • A region with a rich history of primary production, sophisticated food manufacturing outlets, and a high number of internationally renowned restaurants, coupled with a growing population and visitor numbers.
Mining	• The **Mining** sector has the largest potential for growth on the Sunshine Coast with an already significant Fly In Fly Out (FIFO) workforce. • With an airport scheduled for an upgrade and a region-wide focus on the digital economy, the Sunshine Coast region is positioning itself to capitalise on not only a migrating workforce but also to be 'a hub for the mining services sector of the future'.
Digital Frameworks	• Region-wide **digital and technological frameworks** provide the foundations for a progressive Sunshine Coast economy focused on the Digital Future. Without these, our traditional and emerging industry sectors will become uncompetitive. • Infrastructure capacity (fibre optics/broadband/interconnected nodes) will create unique economic and social enterprise solutions by enabling innovative approaches to problem solving.

The Sunshine Coast is a successful economy and is moving into its third phase of development to a large regional economy that has a broad economic profile. Despite the Global Financial Crisis (GFC), population has continued to grow and this has been a core driver of the growth.

Regional Development Australia Sunshine Coast will continue to play a strong role alongside other organisations towards achieving our collective vision for the Sunshine Coast region.

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ABS	Australian Bureau of Statistics
ACOSS	Australian Council of Social Services
AIG	Australian Industry Group
ASIC	Australian Securities Investment Commission
ATO	Australian Taxation Office
BSA	Building Services Authority (Queensland)
BOM	Bureau of Meteorology
CCIQ	Chamber of Commerce and Industry Queensland
CleanTech	Clean Technology Businesses
CSIRO	Commonwealth Scientific and Industrial Research Organisation
DEEWR	Department of Education, Employment and Workplace Relations (Aust)
DETE	Department of Education, Training and Employment (Qld)
DEHP	Department of Environment and Heritage Protection (Qld)
DRALGAS	Department of Regional Australia, Local Government, Art and Sport (Aust)
DSDIP	Department of State Development, Infrastructure and Planning (Qld)
EPA	Environmental Protection Agency
EMDA	Economic and Market Development Advisors
GIBIN	Government Industry Business Information Network
IA	Infrastructure Australia
NSCTF	National Sea Change Taskforce
PEAI	Priority Employment Area Initiative
QH	Queensland Health
REIQ	Real Estate Institute of Queensland
SCBC	Sunshine Coast Business Council
SCC	Sunshine Coast Council
SCDL	Sunshine Coast Destinations Limited
SunED	Sunshine Coast Education
SCEDAB	Sunshine Coast Economic Development Advisory Board
SCEC	Sunshine Coast Environment Council
SC TAFE	Sunshine Coast Institute of Technical and Further Education
SCUH	Sunshine Coast University Hospital
TRA	Tourism Research Australia
USC	University of the Sunshine Coast
UDIA	Urban Development Institute of Australia

INTRODUCTION

Regional Development Australia Sunshine Coast is building solid and long-lasting relationships within communities and across all three levels of government.

Using combined resources efficiently and in partnership, the region's leaders will collectively play a critical role in determining the future of the Sunshine Coast region.

Every organisation has a role to play in helping the region towards their economic development goals as well as the development of deep and long-lasting solutions for environmental sustainability and building social inclusion strategies that will create equity and diversity.

With such broad regional aspirations, where does any one organisation start?

One step at a time is the answer. Regional Development Australia has taken those initial steps and has been listening to the community, working alongside like-minded organisations, 'rolling up their sleeves' and pitching in to help when asked, finding the gaps and opportunities and then taking a leadership approach to help solve problems.

Over time, significant opportunities have emerged and become clearer, resulting in the identification of priority focus areas outlined in this document.

This Regional Roadmap document includes:

- A summary of recent collaboration and consultation activities.
- An overview of RDA Sunshine Coast's four key strategic directions, including priority projects.
- A summary of the Sunshine Coast economy's key building blocks.
- A **State of the Region** profile which paints a broad picture of the social, economic and environmental status of the region using latest statistical data.
- A summary of the key documents and government policy that inform this Roadmap.

Regional Development Australia Sunshine Coast values an evidence-based approach and has developed the Roadmap based on solid research and significant consultation.

The report's **State of the Region** section outlines the current social and economic profiles of the region using latest research, to provide depth and a greater understanding of our regional strengths, opportunities and challenges.

Together the community can work towards aspirations and engage in an ongoing dialogue that will shape the region well into the future.

Regional Development Australia Sunshine Coast is committed to local solutions that reflect the diverse needs and aspirations of the community.

CONSULTATION

Regional Development Australia Sunshine Coast is part of a national network of committees made up of local people, working in collaboration with local organisations to develop local solutions to local issues.

Strong partnerships have been forged between Regional Development Australia Sunshine Coast and a variety of community, business and government organisations through a commitment towards genuine consultation and collaboration.

Over the past 12 months Regional Development Australia Sunshine Coast has either been leading or collaborating in more than 50 distinct projects/initiatives.

These initiatives range across a variety of topics including, youth leadership and opportunity, Sunshine Coast University Hospital, Clean Futures, resources sector, regional priorities roundtables, Sunshine Coast Airport, workforce planning, digital economy, tourism, economic development, Business Expo, transport, industrial land, Healthy Cities initiatives, infrastructure planning and a variety of community forums.

The collaboration and engagement activities range from presenting at conferences, organising forums and conferences, attending meetings, contributing to policy debates, conducting research, strategic planning sessions and many others.

Future collaborative efforts are already in the pipeline with significant projects (outlined in the Regional Priorities section) underway in partnership with organisations such as Sunshine Coast Council, Federal Department of Education, Employment and Work Place Relations, Sunshine Coast Health Sector Panel, University of the Sunshine Coast and the Queensland Department of State Development, Infrastructure and Planning, to name a few.

MAP 1: SUNSHINE COAST AND SURROUNDS

FOCUSING OUR EFFORTS

The Sunshine Coast is a diverse and robust regional community relatively dependent upon traditional economic sectors such as tourism, construction and retail.

What is often described as a number of inter-connected villages, these pockets of urban density along the Coast are interspersed and surrounded by natural environmental, agricultural and recreational spaces, to create a highly desirable lifestyle.

This desirable lifestyle has led to considerable population growth over the years, which creates both challenges and opportunities.

While the population growth rate has recently slowed down, it is still significant and will continue to drive the local economy forward.

The Sunshine Coast regional economy is currently estimated at $13.8 billion in terms of Gross Regional Product for 2010-2011, with the economy growing faster than Queensland and South East Queensland regions.[1]

Previously dependent on residential services (retail and construction) driven by population growth, as well as tourism, the Coast is starting to mature and address new and emerging economic sectors, moving into its third phase of development as a large regional economy with a broad economic profile.

Environmental and social sustainability play equally important roles alongside economic prosperity within the region.

Regional Development Australia Sunshine Coast has been working in partnership with local communities, agencies and governments to identify and prioritise both the opportunities and challenges currently facing the region.

This work has been underpinned by both comprehensive consultation and solid research.

"…the Coast is starting to mature and address new and emerging economic sectors, moving into its third phase of development as a large regional economy with a broad economic profile."

The community is starting to evolve in its thinking and recognise the need for a comprehensive regional vision and strategy. A key component of Regional Development Australia Sunshine Coast's role will be to assist the region in its quest to fully understand and clearly state its long-term aspirational goals.

[1] *AEC Group, Sunshine Coast Economic Profile 2012*

REGIONAL PRIORITIES SNAPSHOT

The following four key focus areas have been identified as priorities for Regional Development Australia Sunshine Coast: Nurturing high potential economic development sectors; advocating for the delivery of priority infrastructure; advancing business and society through technology; and local workforce and employment planning.

Underpinning these focus areas are the principles of environmental sustainability, a vision re-affirmed by the newly-elected Sunshine Coast Council, and the principles of social justice and inclusion.

Nurture high potential economic development sectors

- Fast track and optimise major projects that will have far reaching benefits across the entire Sunshine Coast community.
- Facilitate a community vision and optimise community commitment towards achievable and timely outcomes.

Advocate for the delivery of infrastructure

- Secure funding and the timely implementation for large strategic infrastructure projects for the region.
- Help best represent the community's interests by providing relevant, accurate and timely input into policy debates.

Advancing business & society through technology

- Accelerate the dialogue on the digital economy and capture the community's vision to underpin confidence towards investment and implementation of that vision.

Workforce & employment

- Position the Sunshine Coast region to best meet the needs of future labour demand.
- Partner with community leaders to help lead the agenda and invest in research to inform strategic planning.

FOCUS AREA 1
NURTURE HIGH POTENTIAL ECONOMIC DEVELOPMENT SECTORS

Prioritise large-scale projects that will have a significant flow-on effect into the broader Sunshine Coast Community.

Regional economic development requires continued support of traditional economic strongholds such as the tourism sector, with a reported 8.2 million trips made to the Coast in the year to March 2012 (see Chart 13 Sunshine Coast Tourism Visitor numbers, 2000 to 2012) as well a focus on new and emerging industries.

New and/or emerging industry sectors previously identified as a priority for the region have been aviation, clean tech, renewable energy, creative industries, digital industries, education services, food and beverage, health and wellbeing, light industries, professional services, sport and leisure.

Many public and private sector initiatives are already underway to support the Sunshine Coast's economic development across both our traditional and emerging industries.

Regional Development Australia Sunshine Coast will continue to support local economic development initiatives and has chosen to focus on two catalytic projects that have the potential for exponential benefits to the community at large.

The first is the support of the new $1.57 billion, 450 overnight bed tertiary level hospital and $60.8 million medical training and research centre planned for Kawana.

Opportunity
Fast track and optimise major projects such as the University Hospital and the Agri-Food Sector Value Chain project that will have far reaching benefits across the entire Sunshine Coast community.

Challenge
Due to the large scale and multi-stakeholder complexity of these projects the challenge will be to create timely outcomes that best represent the communities' interests.

Role
Facilitate a community vision and optimise community commitment towards achievable and timely outcomes. To also influence investment and policy decisions that best represent communities of interest and the region as a whole.

Collaborators
- Sunshine Coast Health Sector Panel
- Queensland State Government and relevant departments
- University of the Sunshine Coast
- Communities of interest

This Sunshine Coast University Hospital centre will have the capacity to train 1300 doctors, nurses and allied health professionals every year to staff local hospitals and cater for increasing demand for local health services from our growing (and ageing) population.

The second is Regional Development Australia Sunshine Coast's continued support for the local food and agricultural sector, including the entire value chain from paddock to plate.

The Sunshine Coast Regional Food Security Report[2] found the region does not currently produce sufficient quantities of food to meet local consumption needs. Add to that the significant volumes of

[2] *Sunshine Coast Regional Food Security, Shelton & Frieser, 2009*

visitors to the region, and there is a significant opportunity to maximize our food production, value adding and regional distribution mechanisms.

The Queensland Government estimates the food value chain is worth $18.7 billion per annum and supports 267,000 Queensland jobs.[3] The Sunshine Coast and neighbouring regions such as the Mary Valley and coastal catchment areas are uniquely placed to not only service local demand but also export.

Regional Development Australia Sunshine Coast will address the following two priority projects within this focus area:

SUNSHINE COAST HEALTH SECTOR PANEL

Lead role: Sunshine Coast Health Sector Panel
Strongly supportive role: Regional Development Australia Sunshine Coast

The Sunshine Coast Health Sector Panel is made up of a variety of senior industry, community and government stakeholders including a representative from Regional Development Australia Sunshine Coast, and is coordinated by Sunshine Coast Council.

The panel takes over from the role of the former Sunshine Coast University Hospital Business Industry Development Opportunities Taskforce. Regional Development Australia Sunshine Coast actively participated in the strategic planning tasks of this group last financial year and continues to see this opportunity as a priority focus.

RDA Sunshine Coast continues to be a member of the panel, which is actively promoting business and investment attraction opportunities associated with the new Sunshine Coast University Hospital (SCUH) medical training and research centre.

New infrastructure projects such as the SCUH present an array of social and economic benefits that should be leveraged for the benefit of the entire region. This can only be achieved through widespread consultation and engagement with stakeholders. A holistic approach to construction and development is required as the infrastructure project moves from planning stages through to implementation stages.

> *"New infrastructure projects such as the SCUH present an array of social and economic benefits that should be leveraged for the benefit of the entire region".*

FOOD FUTURES: AGRI-FOOD SECTOR VALUE CHAIN PROJECT

Co-lead role: Regional Development Australia Sunshine Coast, Queensland Government Department of State Development, Infrastructure and Planning, University of the Sunshine Coast and Sunshine Coast Council

Regional Development Australia Sunshine Coast, in conjunction with the above organisations, will actively implement a **food futures** project focused on supply chain issues, business and industry development.

[3] *Food for a growing economy, DEEDI, 2011*

The project will enhance coordination, connectivity and cooperation between enterprises along the Sunshine Coast's food value chain, i.e. from the primary producer, to the distributor and manufacturers through to consumers.
In addition to links along the value chain the project will increase links geographically and increase Sunshine Coast distribution networks, as well as links between neighbouring coastal catchments and the Mary Valley.

The Australian Government's National Food Plan will inform the development of Sunshine Coast regional food industry activities, as will Queensland State Government food and agribusiness initiatives.

This project also aims to increase food-based tourism opportunities on the Sunshine Coast, strongly aligned to our tourism sector as one of our region's major economic drivers.

FOCUS AREA 2
ADVOCATE FOR THE DELIVERY OF INFRASTRUCTURE

Provide evidence-based support for key infrastructure projects that will give government and the private sector the confidence to invest in a timely manner, for the long-term benefit of the region.

Hard infrastructure can be defined as long-term capital assets that convey large quantities of people, vehicles, fluids, energy or information.

On the Sunshine Coast we have a number of priority regional demands such as the integration and quality of our road and rail transportation network.

High priority infrastructure projects are those that provide far-reaching benefits. For example, the upgrade of the Sunshine Coast Airport is not just about more planes landing and taking off; it's about creating a hub to help support and develop our emerging aviation industry as well as providing benefits to our tourism sector and general business activity.

Infrastructure planning, design and implementation is inherently complex, time consuming and expensive. Infrastructure requires large numbers of diverse teams to collaborate over long timeframes through extensive strategic planning and stakeholder engagement. As a consequence, they can easily stall, and/or get put in the ‘too-hard basket’.

Population projections for the region (initially higher than they are now) are still a significant issue for the region and will therefore create significant consumer, commuter and business demand for services.

Opportunity
Secure funding and timely implementation for large strategic infrastructure projects for the Sunshine Coast.

Challenge
Navigate competing priorities and funding requests for the region and galvanizing community support behind strategic high priority projects that will have long-term benefit.

Role
Be the trusted advisor to government by providing relevant, accurate and timely input into policy debates. Help best represent the community’s interests through a partnership approach.

Collaborators
- Australian Government
- Queensland Government
- Sunshine Coast Council
- Business and community groups
- Communities of interest

With sustainability being a strategic cross-cutting issue for not only the region but also all levels of government, the designing, investing in and delivery of infrastructure that meets those sustainability goals are paramount.

Regional Development Australia Sunshine Coast will address the following two priority projects within this focus area:

OPTIMISING THE DEVELOPMENT OF LOCAL PRIORITY INFRASTRUCTURE

Lead Role: Regional Development Australia Sunshine Coast

Regional Development Australia Sunshine Coast will actively advocate and support the following local priority infrastructure opportunities.

A. TRANSPORT INFRASTRUCTURE

i) The 33km section of the Bruce Highway between Caboolture and Caloundra needs to be upgraded from two to at least three lanes (both ways), including the removal of grade intersections. This will improve the highway's safety, capacity and efficiency and has the potential to be addressed in partnership with other Regional Development Australia organisations (i.e. Wide Bay Burnett and Mackay, Isaac Whitsundays) which are similarly eager to improve the Bruce Highway as it extends north from our region as a primary State thoroughfare.

ii) Upgrades to the north coast rail line including dual track railway and alignment of the route between Landsborough and Nambour to boost frequency, speed and reliability of rail services and meet increased demand for passenger and freight transport.

iii) A region-wide review of the public transport infrastructure network including, but not limited to, light rail options.

As the Sunshine Coast region has been growing strongly, so too has the demand on our current transport infrastructure:

- *Private motor vehicles are used for the majority of trips in the region (90%).*
- *Visitors and prospective visitors to the region are citing road congestion as a deterrent.*
- *Seasonal car parking congestion in the region is well documented.*

Extract from State of the Region report, Transport Profile page 41.

B. OTHER INFRASTRUCTURE:

i) Maroochydore Principal Activity Centre, including an Arts, Convention and Entertainment precinct. This concept could be developed using augmented reality digital systems to showcase leading edge digital and information and communications technology (ICT) capabilities.

ii) Upgrade of the Sunshine Coast Airport (see Focus Area 1: Resource Sector Action Plan)

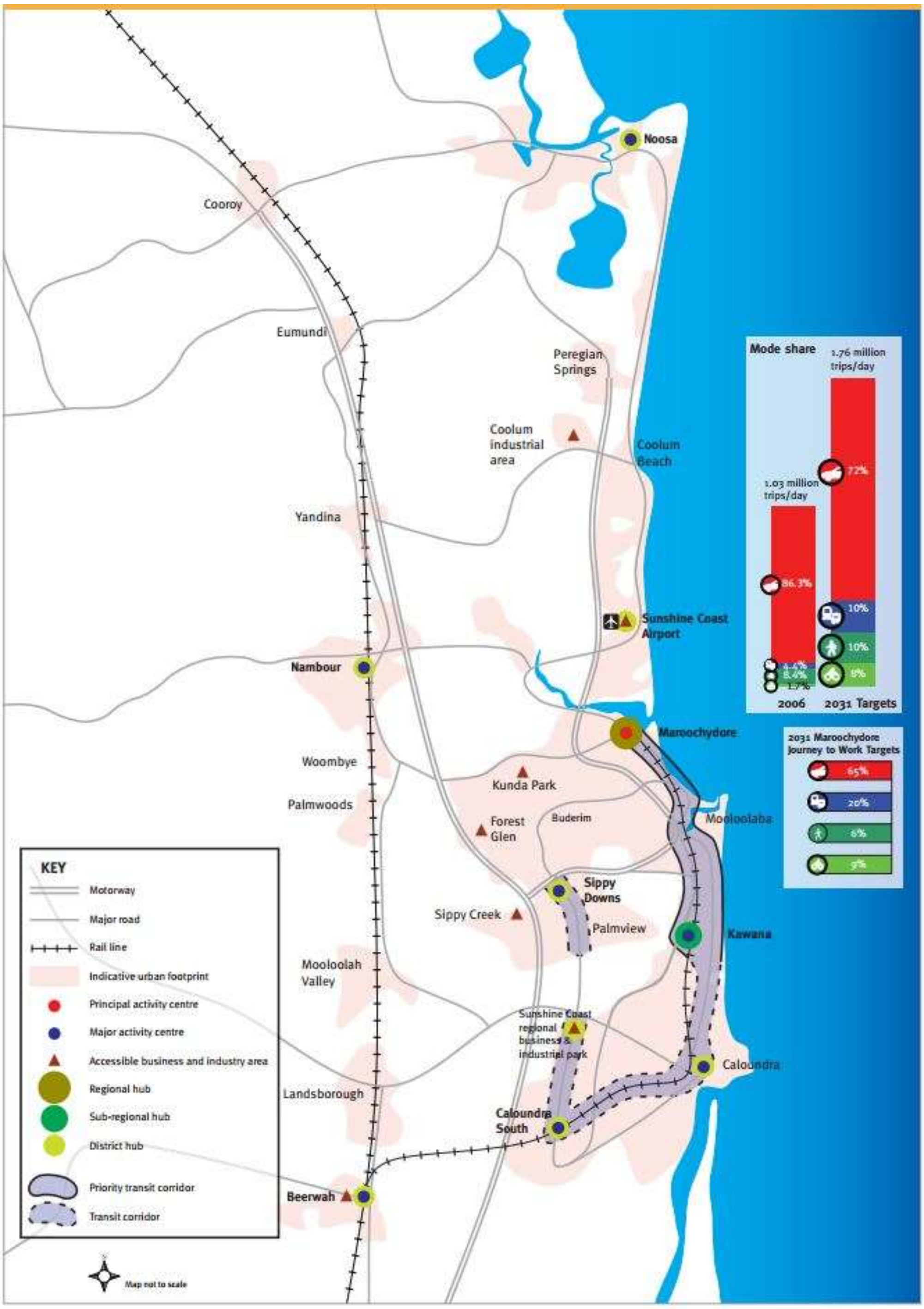
iii) Fast track the roll out of high speed broadband for the Sunshine Coast (Focus area 4).

Improved Transportation Network: Connectivity and Accessibility

Lead role: Regional Development Australia Sunshine Coast

In addition to hard infrastructure as mentioned above, the use and optimisation of that infrastructure and associated services is critical. The provision of efficient and accessible transportation is one of the central mechanisms to facilitate economic, social and environmental opportunities within the urban structure of the Sunshine Coast region.

MAP 2: SUNSHINE COAST TRANSPORT AND LAND USE INTEGRATION



Source: Connecting SEQ 2031 An Integrated Regional Transport Plan for South East Queensland

Regional Development Australia Sunshine Coast advocates for a region-wide review of the **management** of the Sunshine Coast public transport network (frequency, reliability, intermodal connections and routes), including improved data sets regarding travel behaviour and urban density models, and the quality and legibility of pathways and cycleway networks.

Data collected for the Sunshine Coast Council Community Plan (Nielsen, 2010) rated the issue of connectedness and accessibility, particularly via improved public transport, as the second highest issue after managing growth; and health and wellbeing, when residents were asked what they wanted the region to be like in the future.

These critical issues of connectivity and accessibility are intrinsically linked to the hard infrastructure priority projects (mentioned in the above project) and should be integrated into the feasibility of current key local transport mode options including, but not limited to, light rail and priority bus corridors.

Map 2, on the previous page, is an excerpt for the Connecting SEQ 2031 document that was released in 2011. Regional Development Australia Sunshine Coast notes that the rail link through to Maroochydore is clearly shown. It is important that he land reserved for this transport corridor remains available for future transport options.

In August 2012 the Sunshine Coast Council announced a “Light Rail” feasibility study with assistance from the Australian Government’s “Liveable Regions” fund that will investigate the type of transport options that would be used in this transport corridor. This study is expected to take two years to complete and will look at all viable mass transport options.

FOCUS AREA 3
ADVANCING BUSINESS AND SOCIETY THROUGH TECHNOLOGY

Capturing the unique opportunity of broadband and information technology development to further the economic and social wellbeing of communities across the Sunshine Coast region.

Little, if anything, has changed the shape of business and society in the past 20 years as much as information technology and the internet.

It has effected how we work, live and play. It impacts every aspect of our life, from economic activity through healthcare, education and security.

Technology has the capacity to give businesses and organisations access to new markets, to change the way they innovate and the way they create and provide value to both customers and stakeholders.

Technology gives consumers unprecedented access to goods, services, information and knowledge, enhancing their wellbeing.

The United Nations now considers access to broadband a human right.[4]

Information technology will continue to expand in both scale and sophistication.

Advantage will go to communities that know when and how to tap into the benefits that come with advanced technologies, whether in a commercial, educational, healthcare, security or other context.

New technology will also affect our future workforce as structural changes to the global economy will affect local economies, forcing the question of which industries will disappear versus what are the new industries of the future?

Opportunity
The Sunshine Coast can become a leader in new technology deployment and innovation through collectively imagining and creating new opportunity using tomorrow's technology, today.

Challenge
Articulating and implementing the Sunshine Coast digital vision in a timely manner to gain regional advantage, as many other regions across Australia are competing to become leaders in this area.

Role
Accelerate the dialogue and capture the community's vision to underpin confidence towards investment and implementation of that vision.

Collaborators
- Australian Government
- Queensland Government
- Sunshine Coast Council
- Education providers
- Innovation Centre Sunshine Coast
- Business and community groups
- Communities of interest

The Sunshine Coast is well placed to benefit from the continued growth in the digital economy with 73% of occupied households on the Coast already connected via broadband,[5] which is above the national average.

[4] *A snapshot of Australia's Digital Future to 2050, Ibis World, 2012*
[5] *2011 Census data*

Regional Development Australia Sunshine Coast will address the following two priority projects within this focus area:

Digital Futures Project

Co-lead roles: Regional Development Australia Sunshine Coast and Sunshine Coast Council

Regional Development Australia Sunshine Coast is collaborating with key regional stakeholders to drive access to, and adoption of, key technologies that support the transition to a digital economy.

> *"The ubiquitous adoption of high-speed broadband services, in concert with technology, will enable powerful innovations across different sectors of the economy: from business to business, business to the home, and machine to machine. In turn, these applications will help address social and economic challenges of the future."*
>
> Australia's Digital Future to 2050, Ibis World.

Through extensive community consultation and participation, opportunities will be prioritised and key regional agendas of sustainability, prosperity and innovation will be accelerated through creative connectivity.

Advances in information and communications technology have already changed the way business is conducted and will continue to improve efficiency in almost all sectors of the Sunshine Coast economy.

Connectivity within a decentralised region such as the Sunshine Coast is essential to place people closer to the jobs, facilities, goods and services they desire and connect them to the global community.

Through becoming both innovators and early adopters of new technology the region can ensure ongoing economic viability.

Smart Communities

Co-lead role: Queensland Government and the University of the Sunshine Coast
Strongly supportive role: Regional Development Australia Sunshine Coast

The Queensland Government and the University of the Sunshine Coast have identified Sippy Downs as an opportunity to develop a 'smart community' or 'knowledge precinct'. The proximity of a designated knowledge precinct adjacent to this fast-growing university provides greater levels of integration - physically and culturally.

This holistic approach would ensure resources were used more effectively and efficiently, including a higher level of community participation and a wider distribution of economic benefit through collaboration.

Meanwhile population growth continues to be anticipated, suggesting the need for increased employment opportunities in the future, strengthening the case for this master-planned 'smart' economic activity centre.

FOCUS AREA 4
WORKFORCE & EMPLOYMENT

Ensuring our region has a skilled and ready workforce to meet changing demand.

With population growth projections still expected to continue for the Sunshine Coast region this will continue to drive economic growth and in turn, labour demand will also continue to grow.

Both employer and employee requirements will not just expand, they will also evolve. Some changes will be modest, paced and manageable. Other changes will involve dramatic long-term shifts in labour market dynamics and near-to-medium-term spikes in demand for certain skills.

These dynamics can have profound and widespread effects on both employers and employees. For example, over time many traditional industries continuously evolve by embracing new business development strategies and innovative technologies, which in turn impact the skills they seek from the labour market. Meanwhile, new industries emerge and grow, increasing demand for skills and expertise in non-traditional fields.

Progress on educational attainment levels increases the number of people who seek not simply 'a job' but a long-term career pathway.

Our population is facing some structural changes over the long-term as it progressively gets older, adding a further challenge to effective workforce planning.

Growth in our local population over the past several years has been largely driven by our key coastal industries, namely tourism, retail and construction. This has attracted a more flexible workforce to the region; however, will it be the workforce of the future?

Workforce and employment planning is about better predicting and catering for these medium and long-term trends to optimise the relationship between labour demand and supply.

Without effective workforce and employment planning, regional development can be severely compromised. Local employees can miss out on local opportunities if, for example, they lack appropriate skills, training and experience.

Opportunity
Position the Sunshine Coast region to best meet the needs of future labour demand.

Challenge
The Sunshine Coast will have a continued aging population. Industries will also change, resulting in changing demand for labour.

Role
Partner with community leaders to help lead the agenda and invest in research to inform strategic planning.

Collaborators
- Education and research institutes
- All regional schools
- Australian Government
- Queensland Government
- Sunshine Coast Council
- Communities of interest
- Business and community groups
- Employers
- Job seekers

Regional Development Australia Sunshine Coast will address the following three priority projects within this focus area:

2012-2013 Workforce Planning Research Project

Co-lead role: Regional Development Australia Sunshine Coast
Co-lead role: Department Education, Employment and Work Place Relations, Australian Government
Strongly supportive role: Sunshine Coast Council

This comprehensive research project will provide a detailed overview of the Sunshine Coast's current workforce and help **project anticipated changes** to the workforce over the next 20 years.

The study will analyse the workforce from both a skills perspective, as well as a scale perspective, and help the region meet labour-market demand driven by regional infrastructure projects and the resource sector boom with minimal disruption on other industries.

Once the initial data collection and analysis has been completed, Regional Development Australia Sunshine Coast and its partner organisations intend to work together to share the research findings broadly, as well as lead development of a region-wide Workforce Development Strategy.

Resource Sector Action Plan

Lead role: Sunshine Coast Council
Strongly supportive role: Regional Development Australia Sunshine Coast

The Sunshine Coast Council is developing a Resource Sector Action Plan in partnership with a number of key organisations, including Regional Development Australia Sunshine Coast.

The resources sector is driving economic growth nationally, and is a significant opportunity for the Sunshine Coast economy and society.

Direct employment in the Sunshine Coast mining sector has increased to more than 5,000 workers (See Chart 17 Sunshine Coast Mining Employment May 2012) indirectly, the Coast's financial, business services and technical support sector is also benefiting from the growth in the mining sector.

Numbers of both Fly In Fly Out (FIFO) and local mining related support workers based in the region will continue to grow. This growth will also increase the viability of expanding the Sunshine Coast Airport's capacity, a key infrastructure asset for the region.

> *"Regional Development Australia Sunshine Coast's objective is to promote a whole-of-region approach to Resource Sector Action Plan development, ensuring the region benefits from the current increase in resource company construction and operations."*
>
> Regional Development Australia Sunshine Coast Chair Prof Max Standage

PRIORITY EMPLOYMENT AREA PROJECT

Lead role: Department Education, Employment and Work Place Relations, Australian Government
Strongly supportive role: Regional Development Australia Sunshine Coast

The Priority Employment Area project is an Australian Government initiative that invests in specific regions across Australia to addresses local labour market challenges.

RDA Sunshine Coast seeks to regularly collaborate with the local Priority Employment Area Committee and their work in the Sunshine Coast region to assist job seekers and connect them with future employers.

These activities include expos, conferences and public forums which are integral to regional engagement, a continuation of RDA Sunshine Coast's extensive community consultation program, and will support the delivery of projects aimed at assisting employment outcomes for local residents.

The **State of the Region** section of the Regional Roadmap provides an in-depth overview of the people, their lifestyles, employment, businesses and the threats and opportunities within the Sunshine Coast region, using latest data from a variety of sources including the Australian Bureau of Statistics (ABS).

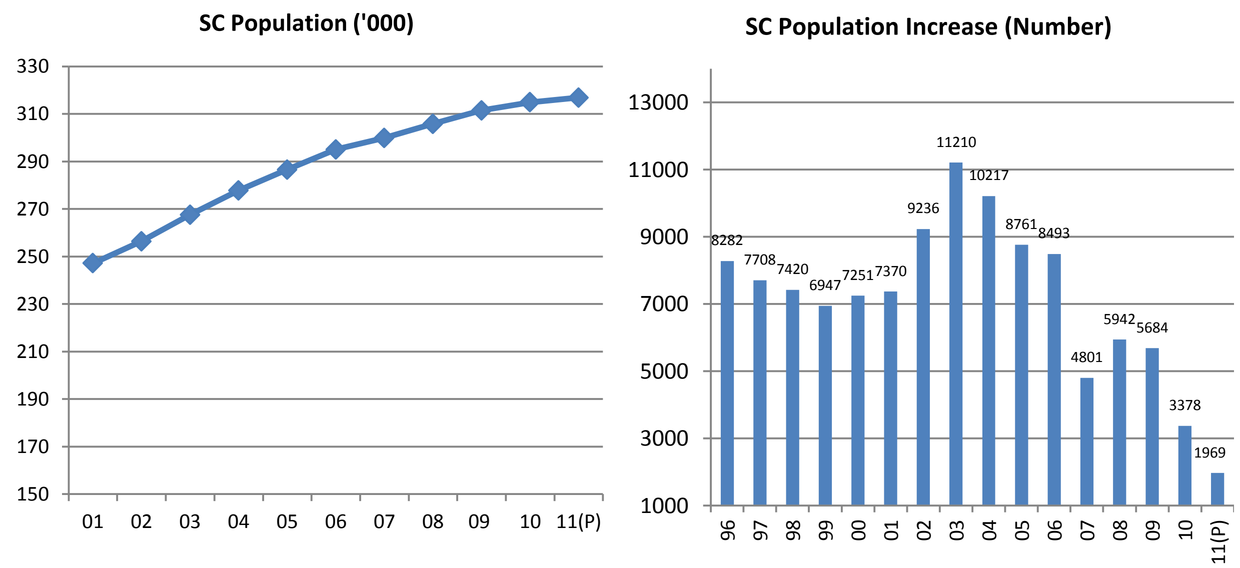
Put together in the **State of the Region** format, the information creates an overall picture of the local economy and forms the basis of Regional Development Australia Sunshine Coast's priorities and projects.

CURRENT POPULATION

A key feature of the region has been its strong population increases. Since 2001 the population has grown 28.2% and added 69,691 people over this time. The Sunshine Coast's share of Queensland population growth has slowed from more than 10% in 2002, 2003, 2004 to 3.9% by 2011. The reasons for the slowdown in growth include the overall weaker economy, the soft tourism market which is a critical industry to the Coast, and infrastructure bottlenecks. It is still the case, however, that the Sunshine Coast has been one of the fastest growing regions in Australia.

Several factors have driven these increases, including the relaxed lifestyle, favourable climate and more than 200 kilometres of coastline.

CHART 1 SUNSHINE COAST POPULATION LEVELS AND INCREASES, 1996 TO 2011



Source: ABS regional Population Data

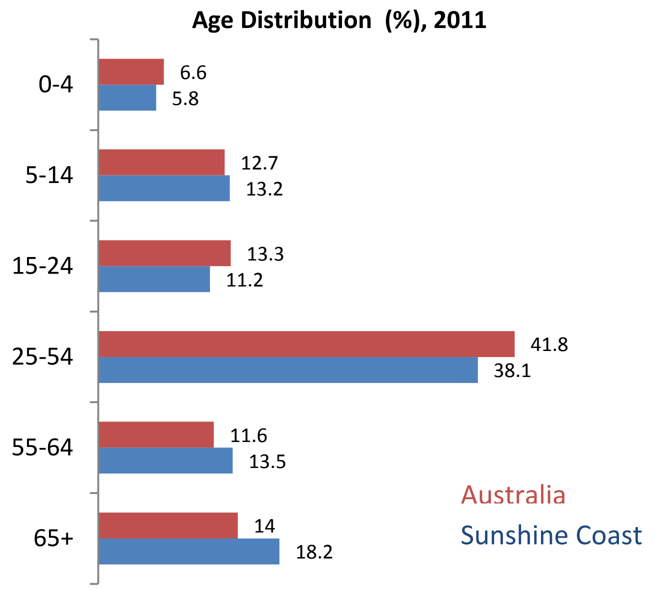
The charts above reflect this increase. Since 2002 the growth rate in terms of absolute numbers of people has increased as more people have been attracted to the region. Even since the GFC started in 2008, the Sunshine Coast has added 11,031 people, the equivalent of a small town.

CURRENT POPULATION CHARACTERISTICS

The Sunshine Coast's population can be characterised as reasonably typical of Australia overall in terms of profile; the key differences/similarities are highlighted in Chart 2 Sunshine Coast age distribution.

The age profile of the region departs significantly from Australian averages in some age categories. For example, older people in the 65 years + category represent 18.2% of the Sunshine Coast population, whereas they account for 14% of Australia's population. The Sunshine Coast also has an over representation of 55-64 year olds. These differences reflect the appeal of the Sunshine Coast as a retirement destination. As a consequence, there is an under-representation in other age groups such as the younger adults and 25-54 year olds, who usually leave the area in search of work. The population on the Coast has aged further since the 2006 Census.

CHART 2 SUNSHINE COAST AGE DISTRIBUTION, 2011



Source: ABS Census, 2011

In the two decades to 2026, the number of people over the age of 65 is predicted to more than double (from 47,554 to 100,774), while the number of people over the age of 85 is likely to almost treble. Although this structural ageing of the population is a national phenomenon, the impacts are experienced earlier and more profoundly in sea change communities like the Sunshine Coast, than they are in non-coastal communities.

The ageing population has many implications including increased expenditure associated with income support, adequate provision of health and disability services and increased need for family and community care. Changing demographics of the region will also lead to transformation in urban form across the Coast, with increased need for health hubs, and the number, type and location of relevant services (SCC Community Planning Fact Sheet 02).

URBAN DENSITY

The Sunshine Coast region has a population density of 102.7 people per square kilometre, far less overall than the Gold Coast (284.2 people per square kilometre), and total Greater Brisbane (135.6 people per square kilometre). However, this lower average is a combination of high density locations such as Noosa (405.9), Nambour (346), Maroochydore (1241.3) and Mooloolaba (2055.8). In the case of Mooloolaba this is about the same density as a suburb in a major capital city.

The overall lower level density is due to development constraints on multi-story units, the level of open areas (National, State parks etc.) and cane field areas which are prone to flooding and therefore are unsuitable for urban development. These open areas and low density are a core appeal for some residents living on the Coast and there is a desire to maintain this low density.

However 'Our Place Our Future' consultations found that while respondents wanted population growth to be managed, a substantial majority supported discrete areas of higher density in appropriate locations with careful management of the impacts of density on local character (The Affordable Living Strategy 2010). Aspects of overcrowding, such as traffic congestion, are becoming evident in high density areas.

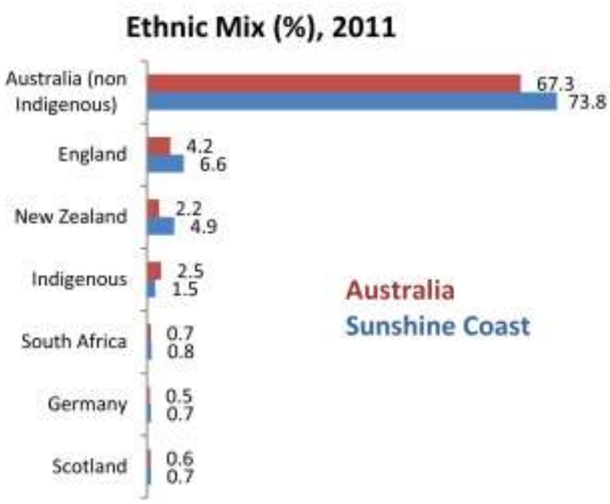
According to the Socio-Economic Indexes for Areas (SEIFA - developed by the ABS), the Sunshine Coast has a significantly higher proportion in the most advantaged quintile (29.3%), compared with 20.0% for the State and only 9.8% in the lowest quintile (20.0% for the State). The reason could be attributed to a higher level of reasonably well off retirees in the region, boosting incomes among older people. However, increases in the general cost of living are having an impact and an increasing number of retirees and the older demographic are now facing financial hardship.

The five localities with a lower SEIFA score on the Sunshine Coast include: Caloundra-Kings Beach-Moffat Beach-Shelley Beach; Cooroy; Nambour-Burnside and District; Cooran-Federal; and Maroochydore. Low socio-economic areas tend to have poorer health and physical activity measures such as Type 2 Diabetes and obesity, in particular where there are larger numbers of those aged 65+. These five localities have high numbers of people aged 65 years and over and have a greater unemployment rate compared with the rest of the Sunshine Coast (SCC Community Profile – accessed 4 October 2010).

ETHNICITY

Chart 3 shows that the Sunshine Coast has a population that is predominantly born in Australia (73.8%), which is higher than the Australian average (67.3%). There are 75 non-English speaking countries of birth represented on the Coast, with a slightly higher proportion of UK and New Zealand born residents.

CHART 3 SUNSHINE COAST ETHNIC MIX (PLACE OF BIRTH), 2011



Source: ABS Census 2011

The University of the Sunshine Coast plays an important role in increasing the cultural diversity of the region through its international student program. In July 2012, there were 776 international students at the university from 61 countries, including Germany, France, Japan, Republic of Korea and India (USC Website July 2012). There are also 132 Indigenous students enrolled at the university. Culturally and linguistically diverse communities can experience language barriers and isolation along with difficulties in accessing services and employment opportunities.

Sunshine Coast Indigenous Population

The Sunshine Coast has a below average population of indigenous people (1.5%) – 4,590 people, compared with the Australian average of 2.6%. The term indigenous refers to both Aboriginal and Torres Strait Islander people.

The age structure of the Sunshine Coast's indigenous population is much younger than those of non-indigenous descent. Sixty-four per cent (64%) of the local indigenous population is under the age of 30, whereas the proportion of non-indigenous residents under the age of 30 is at 34%. Indigenous teenagers represent 17.6% of the local indigenous population, whereas non-indigenous teenagers represent only 9% of the local non-indigenous population. The medium personal income of the indigenous population is $418 per week, lower than that of the non-indigenous population which is $521 per week.

The Sunshine Coast has a small indigenous population (1.2%) that is seeking a cultural centre and place to use for community meetings and activities including youth leadership and cultural awareness programs. Local indigenous service providers report that the indigenous population is experiencing a number of issues including social isolation, affordable accommodation and difficulty accessing services and programs (Community Planning Fact Sheet No 3). Such a centre can support programs and activities to meet these needs. Indigenous unemployment needs to be addressed at a local level while supporting employment skills, training and programs at a national level.

Education levels

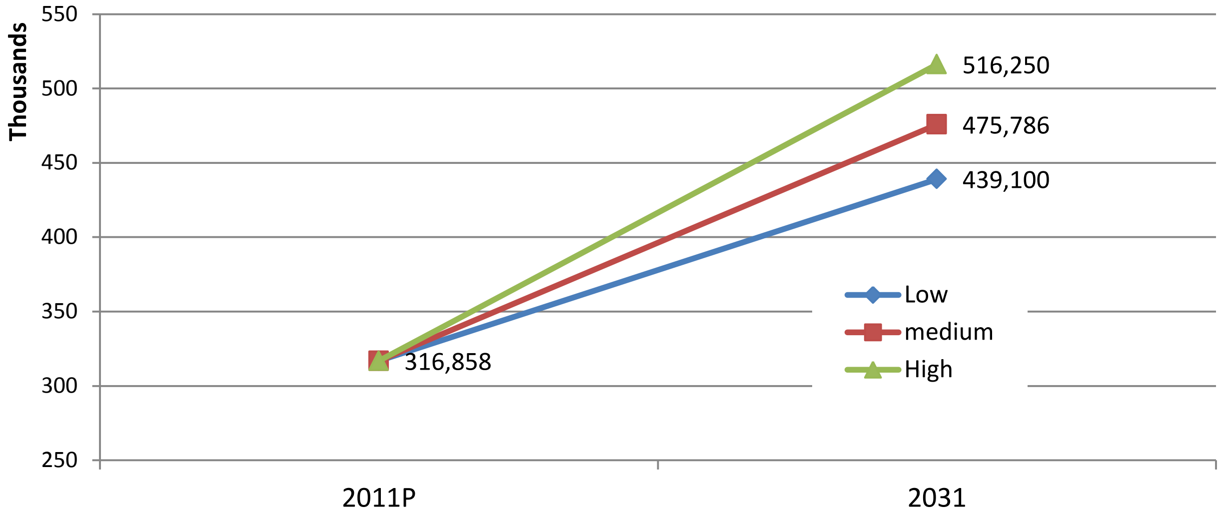
Education is one of the key drivers of the social, cultural and economic development for the region, and is recognised as a fundamental human right. Formal education on the Sunshine Coast is primarily provided through government and non-government schools, tertiary education, including TAFE and university campuses, and various business and training colleges.

Among the Sunshine Coast population, fewer people have a degree or higher (11.6%) versus Queensland (13.1%); whereas the Coast has a higher proportion of those who have some vocational training (19.9% versus 17.8% in Queensland) (source ABS 2006).

Future population levels

The Queensland Treasury has developed population scenarios for the region based on various demographic assumptions (see Chart 4). They have prepared low, medium and high population increase scenarios to 2031, however, at the time of publication these had not been revised with the new 2011 Census data. To allow for this, the growth rates forecast by Treasury have been applied to the 2011 data. This takes into account that the 2011 actuals are much lower than the low forecast level. Over the last five years the region has been growing at 4,355 people per year, which is below the low end of the population projections.

CHART 4 SUNSHINE COAST POPULATION PROJECTIONS, TO 2031



Source: 2011 Actual ABS Regional Population Australia, 2031. EMDA using Queensland Treasury growth rates applied to 2011 actuals.

The population is projected to grow strongly under each scenario. By 2031 even under the low series (depicted by the blue line in chart 4), the population is forecast to grow to 439,100, an increase of 38.6% from 2011. Under the medium scenario (red line) a 50.2% increase is forecast, and under the high scenario (green line) a 62.9% increase is forecast (see Table 1 below).

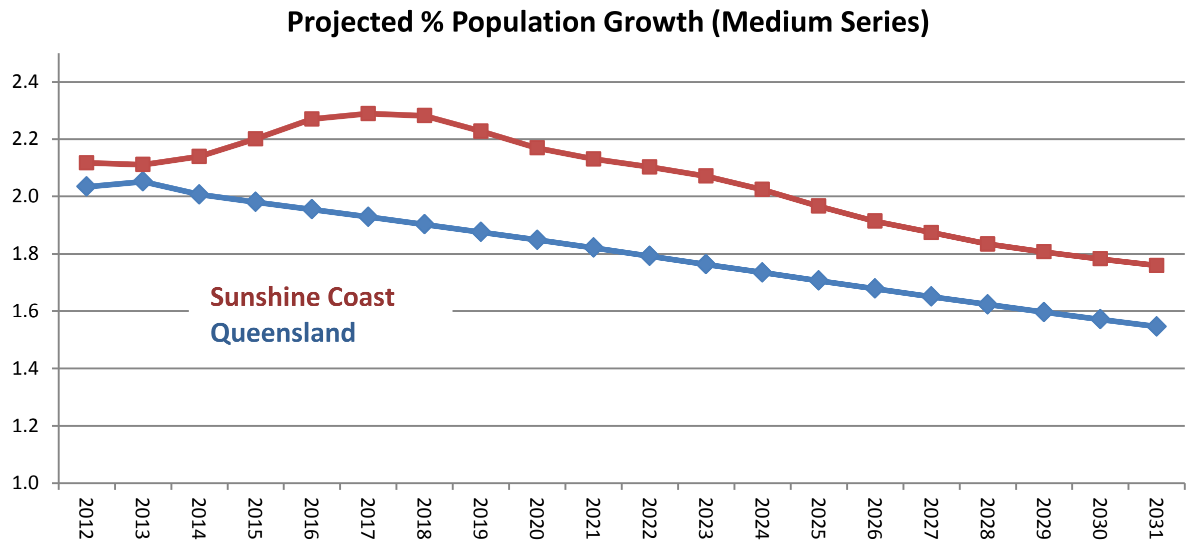
TABLE 1 POPULATION SCENARIOS FOR THE SUNSHINE COAST POPULATION

Series	Popn Level 2011A	Popn level 2031	Popn increase 2011 to 2031	% increase 2010 to 2031
Low	316,858	439,100	122,242	38.6
Medium	316,858	475,786	158,928	50.2
High	316,858	516,250	199,392	62.9

Source: 2011 Actual ABS Regional Population Australia, 2031. EMDA using Queensland Treasury growth rates applied to 2011 actuals.

Under each population scenario, the Sunshine Coast is forecast to grow faster than Queensland overall (in Chart 5 below the medium series is shown). Even under the low scenario, considerable further investment in infrastructure will need to be made.

CHART 5 SUNSHINE COAST PROJECTED % POPULATION GROWTH (MEDIUM SERIES)



Source: 2011 Actual ABS Regional Population Australia, 2031. EMDA using Queensland Treasury growth rates applied to 2011 actuals.

Under the high scenario the population would become similar in magnitude to a capital city such as Canberra and would require substantial investment in infrastructure to maintain the quality of residents' lifestyles.

It is stressed that these projections essentially show what the region could grow to should the circumstances allow. There is considerable debate in the region about this issue.

POPULATION LEVELS – LIFESTAGE

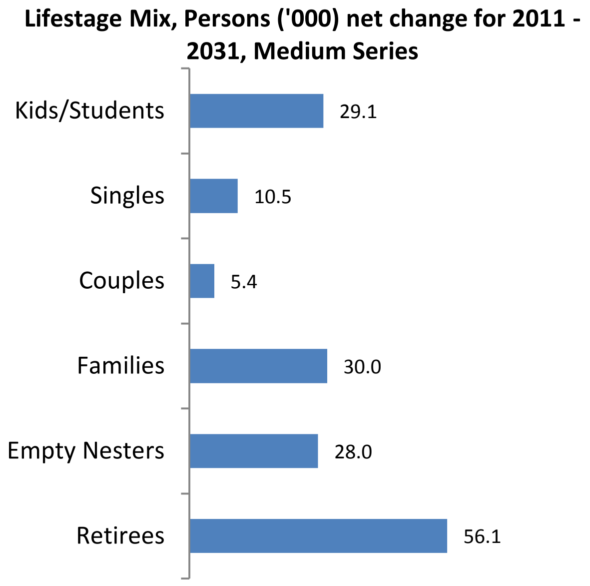
Expert economists EMDA have developed a population model by lifecycle, with the results shown in chart 6 Sunshine Coast lifestage mix, 2011.

It identifies the possible change in the Sunshine Coast's lifecycle composition over the next 20 years under the medium population scenario. It shows that an additional 56,100 retirees are expected, an additional 30,000 adult members of families and 29,100 of their children. The growth in retirees is consistent with Australia's aging population. Singles and couples are also forecast to grow, but only by 15,900.

There will be a requirement for key infrastructure to meet the needs of each lifestage in the future:

- Children/students: educational institutions.
- Singles: education/vocational opportunities, career opportunities.
- Couples (no children): career opportunities.
- Families: education (for children), career opportunities.
- Empty nesters: career/work opportunities.
- Retirees: leisure, health facilities and increasingly some job opportunities.

CHART 6 SUNSHINE COAST LIFESTAGE MIX, 2006



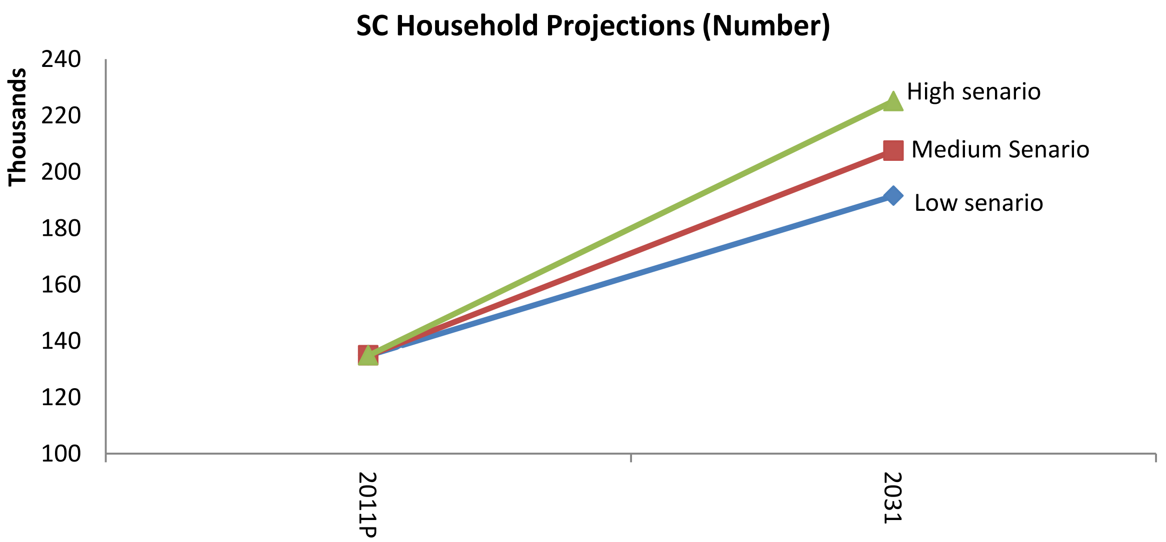
Source: EMDA Future Coast Model, derived from ABS Census 2011 data

URBAN DEVELOPMENT PROFILE

The number of dwellings required to meet these population levels has been modelled under each of the population scenarios (Chart 7 Sunshine Coast household projections to 2031).

By 2031, 59,909 dwellings (45.2% increase from 2011) would be required to meet the low scenario population increase. If the high scenario populations were met, then an additional 96,810 (73.1% increase from 2011) dwellings would be required in the region.

CHART 7 SUNSHINE COAST HOUSEHOLD PROJECTIONS TO 2031



Source: EMDA *Future Coast* Model, based on number of people per dwelling, ratios from the ABS Census, 1996, 2001, 2006 and 2011.

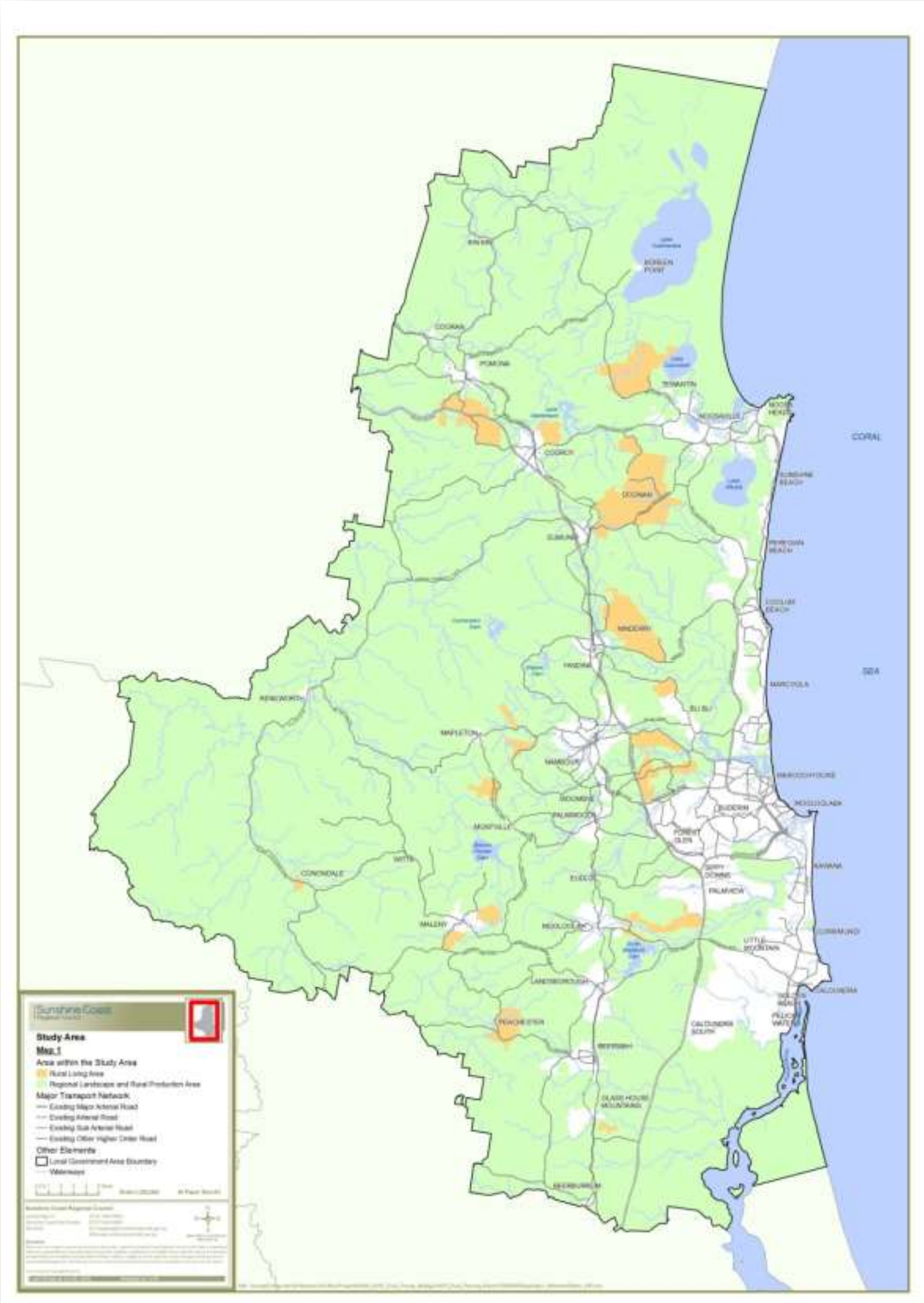
TABLE 2 DWELLING SCENARIOS FOR THE SUNSHINE COAST – 2031

Series	Number of dwellings 2011P	Dwellings 2031	Dwelling increases 2011 to 2031	% increase 2010 to 2031
Low	134,870	191,480	56,610	42.0
Medium	134,870	207,478	72,608	53.8
High	134,870	225,123	90,253	66.9

Source: EMDA Future Coast Model

Map 2 (overleaf) shows that there are limited opportunities to expand the urban area. The non-urban areas on the Sunshine Coast contain critical natural areas including National Parks, State Forests, good quality agricultural land and constrained land. To maintain the natural values and characteristics of the region and improve opportunities for affordable living, a diverse range of housing opportunities need to be considered within the existing urban areas (including Palmview and Caloundra South).

MAP 3 : SUNSHINE COAST URBAN AREA



Economic Profile

The economic value of the region

The Sunshine Coast region's gross regional product (GRP) has been growing strongly over the last 20 years, although growth has slowed recently due to the GFC. The size of the region's economy is estimated by AEC (June 2011) at $13.8 billion in 2010/11.

Key drivers of this economic growth have been:

- Strong population increases on the Sunshine Coast.
- Growth in the key coastal industries such as tourism, retail and construction.
- Attracting a more flexible workforce.

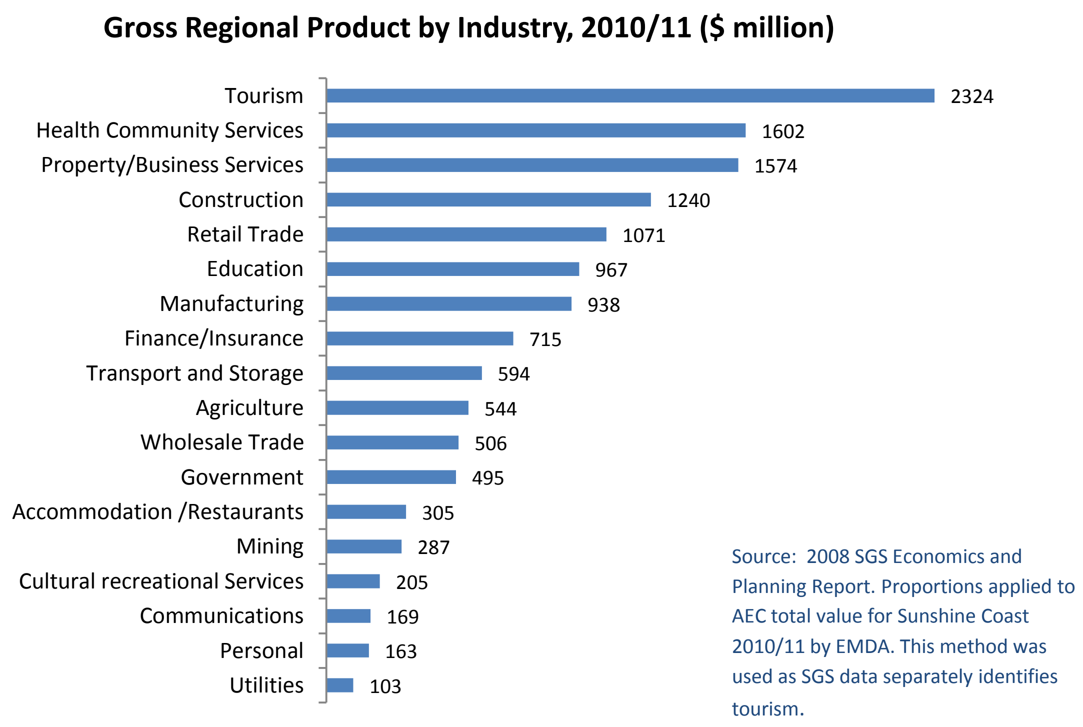
This economic activity supports approximately 31,758 businesses on the Sunshine Coast; 85.3% of these businesses have five or less employees. The profile in terms of number of employees per business is similar to the Australian average of 84.8% (source: Economic Development Strategy 2010-2014).

The economic value by industry in the region

Chart 8 Gross Regional Product by Industry, 2010/11 shows tourism is the most valuable industry on the Sunshine Coast, estimated to be worth $2,324 million in 2010/11.

Other industries related to the tourism sector are also strong performers, with construction worth $1,240 million and retail $1,071 million per annum.

CHART 8 GROSS REGIONAL PRODUCT BY INDUSTRY, 2010/11



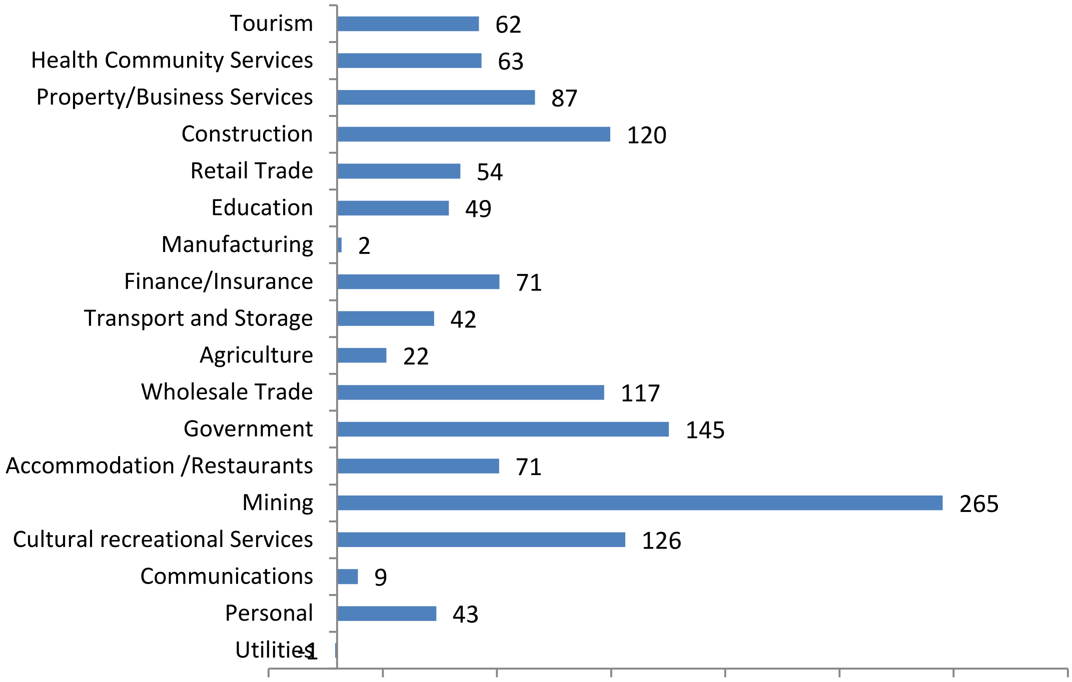
The impact of strong population increases is also evident in other industry sectors, with education, health and community services sectors increasing on the Sunshine Coast.

The emerging diverse nature of the economy is also apparent, with a mining sector worth $287 million and a manufacturing sector of $938 million per annum.

GROWTH INDUSTRIES IN THE SUNSHINE COAST REGION

The largest industries have been growing at impressive rates; tourism has increased by 62%, construction 120% and retail trade 54%. All sectors (other than a minor fall in utilities) have increased, including a slight increase in the manufacturing sector. Chart 9 Change (%) GRP by industry, 2003-2008 represents the changes in GRP across industries.

CHART 9 CHANGE (%) GRP BY INDUSTRY, 2003-2008



Source: SGS Economic and Planning Report 2009

The most rapidly growing industry has been the mining sector which has grown by 265% since 2003, largely due to the commodities boom. The Coast is emerging as an important service centre to the mining industry.

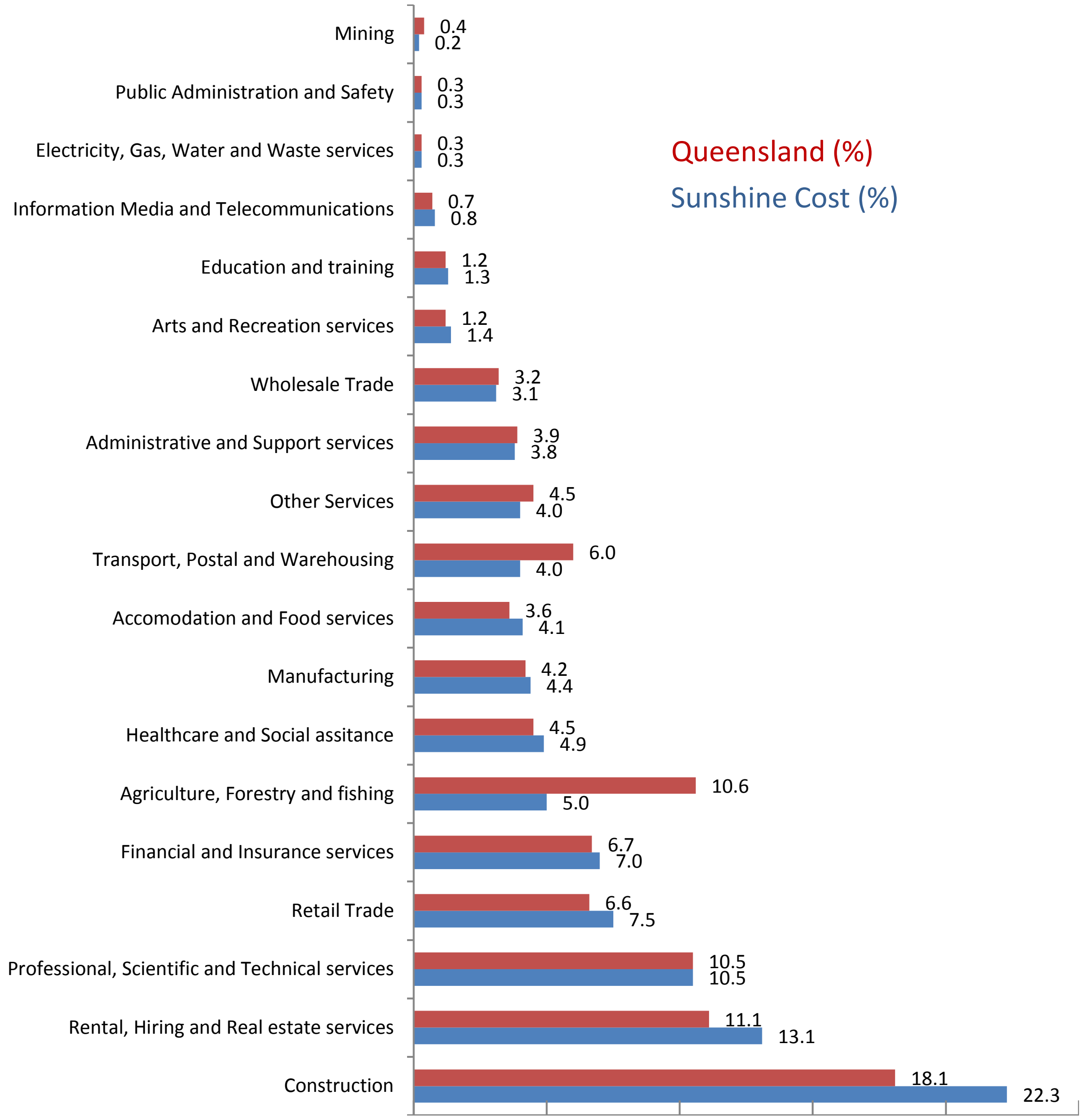
The impact of strong population increases and an ageing demographic is also evident in the strong increase in the health and community services sector.

The growth across all these industries shows that while tourism is a critical component of the Coast's economy, other industries are also growing, leading to a more diversified economy as it transforms to the third phase.

2011 INDUSTRY PROFILE SUNSHINE COAST – BUSINESS NUMBERS

The Sunshine Coast has a bigger proportion of construction industry businesses compared to the Queensland average, which reflects its importance in the region. The Coast has a below average number of agricultural business and is about average in the tourism area compared with Queensland averages.

CHART 10 SUNSHINE COAST INDUSTRY BUSINESS PROFILES – 2011

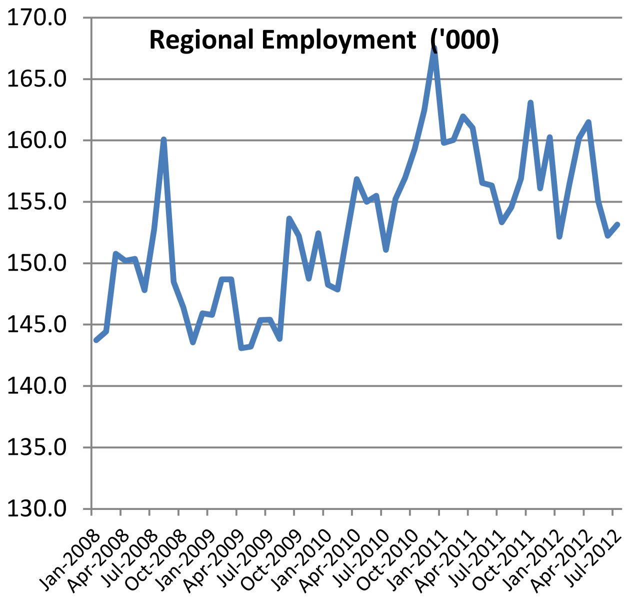


Source: Queensland Government Data

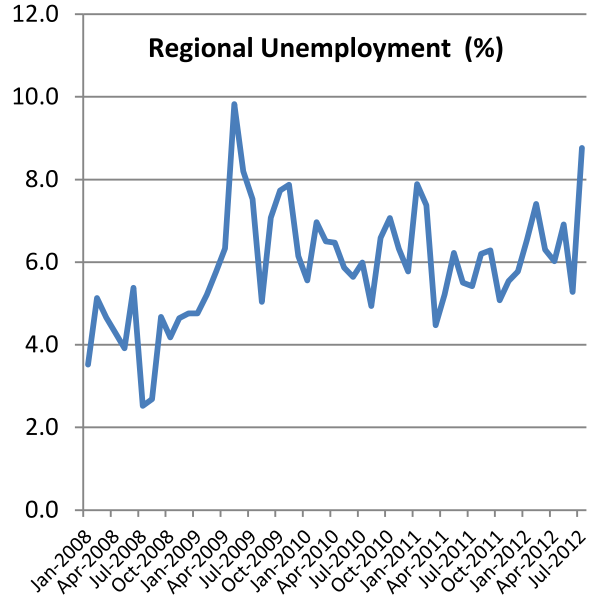
EMPLOYMENT AND UNEMPLOYMENT

Chart 11 Regional employment and unemployment shows the Coast has not been immune to the impacts of the GFC. During this time employment fell and unemployment rose.

CHART 11 REGIONAL EMPLOYMENT AND UNEMPLOYMENT



Source: ABS Regional Labour Force Data



Source: ABS Regional Labour Force Data

Jobs on the Coast, while better than during the GFC, have steadied and unemployment still remains above the national average. High unemployment indicates that some businesses are still feeling the impact of the GFC, have yet to recover fully and are reluctant to take on new staff.

While the fall in unemployment from the GFC-induced peak is welcomed, the number of workers on the Coast is currently limited. Typically after a downturn there is a large pool of unemployed to fill jobs as the economy grows (the US is experiencing this now). However, this is not the case on the Coast except in the areas of youth and the older demographics of semi-retired and retired. This means that further employment growth will either come from migration into the region or from the current population. This could mean that retirees may be encouraged to re-join the workforce to lift the number of available workers in the region.

YOUTH UNEMPLOYMENT

Employment statistics from ABS Census data 2006[6] indicate that the majority of 15-24 year olds in the region were employed in the retail industry (26.3%), followed by accommodation and food services (19.7%) and construction (12.3%). In total, these industries employed 58.3% of 15-24 year olds. This largely reflects the region's economic base and employment opportunities. Alternative employment options need to be developed for young people outside these core industries.

According to the ABS labour data, young people in Queensland continue to experience significantly higher rates of unemployment at 16.9% among those not attending full-time education, compared to 5.5% across all age categories.

[6] *2011 Census data in this category was unavailable at the time of writing.*

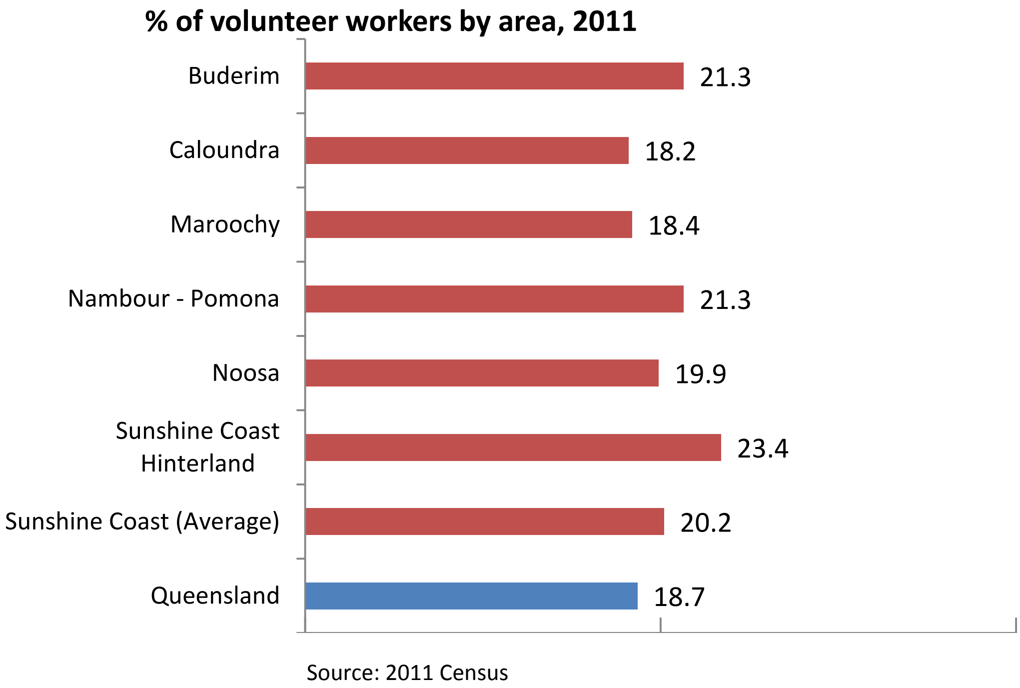
This is further compounded in the Sunshine Coast where youth unemployment has reached an unacceptably high level. The 2010 Sunshine Coast Youth Summit survey found that youth unemployment was the second most important issue concerning young people living in the region.

This is an area that requires focus to ensure that today's youth are trained and skilled to be welcomed into tomorrow's workforce.

VOLUNTEERS

The Sunshine Coast has above average levels of volunteers, with 20.2% of the population undertaking some form of volunteering, compared to 18.7% of the Queensland population. This is a reflection of the Coast's older age profile, as older people (especially retired) are more likely to volunteer.

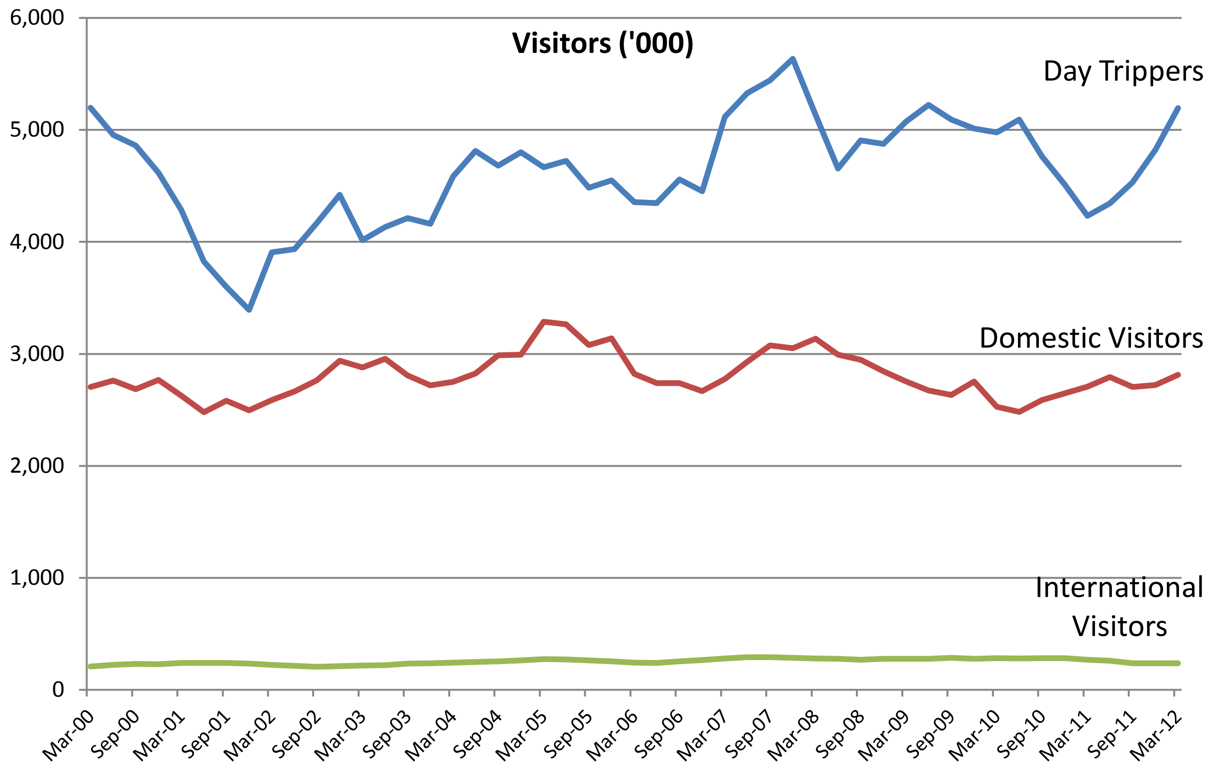
CHART 12 PERCENTAGE OF POPULATION THAT VOLUNTEER 2011



TOURISM

Tourism is a major industry on the Sunshine Coast and generates a large number of visitors to the region. Using data from Tourism Research Australia, 8.2 million trips were made to the Coast in the year to March 2012; this comprises 237,000 international visitors, 2,812,000 domestic overnight visitors and 5,196,000 domestic day trippers. In the last year the number of day trippers surged by 22.7%, while the international market weakened 12.3% due primarily to the GFC. The domestic overnight market has improved slightly by 3.8%.

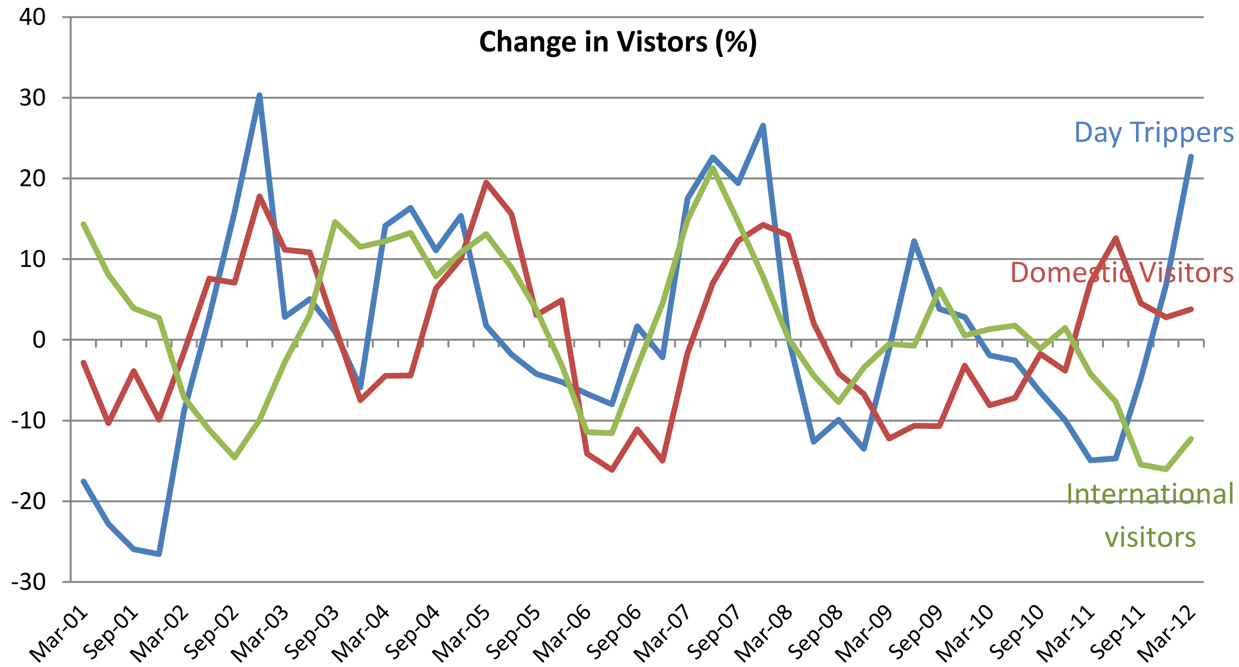
CHART 13 SUNSHINE COAST TOURISM VISITOR NUMBERS, 2000 TO 2012



Source: National Visitor Survey and International Visitor Survey

Visitor numbers have been strong over the last decade. There is a need for improved infrastructure, including alternative transport, health care, sport and recreation and cultural facilities to continue to support strong visitor numbers.

CHART 14 SUNSHINE COAST TOURISM CHANGE VISITOR NUMBERS, 2000 TO 2012



Source: National Visitor Survey and International Visitor Survey

As Chart 15 below shows, tourism employment numbers grew in 2010 since the GFC, but then softened due to the weaker inbound market.

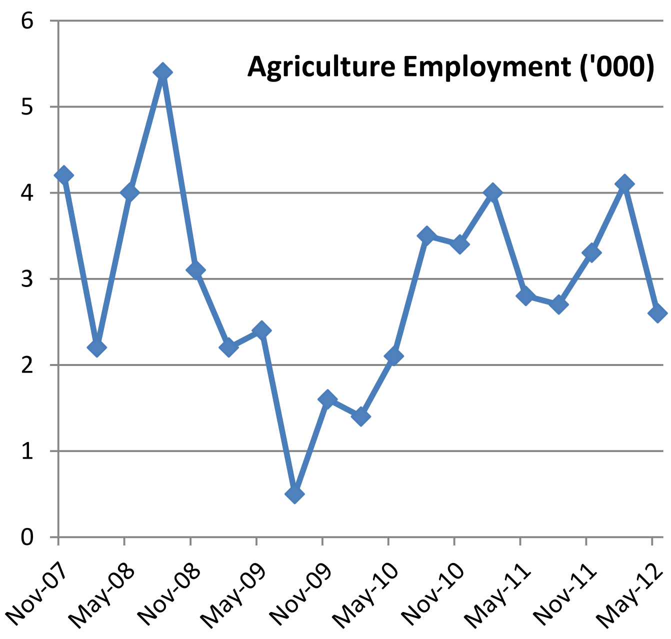
CHART 15 SUNSHINE COAST TOURISM EMPLOYMENT MAY 2012

Source: Derived by EMDA from ABS Regional Labour Force Data

Sunshine Coast Agriculture

Agriculture (including fishing and forestry) employment is a small component of the Sunshine Coast employment market. ABS estimates that 2,600 people work in this industry. However, these figures do not include the broader category of food and beverage supply and distribution. Sugar cane production is a big component of agriculture on the Coast.

CHART 16 SUNSHINE COAST AGRICULTURE EMPLOYMENT MAY 2012



Source: ABS Regional Labour Force Data

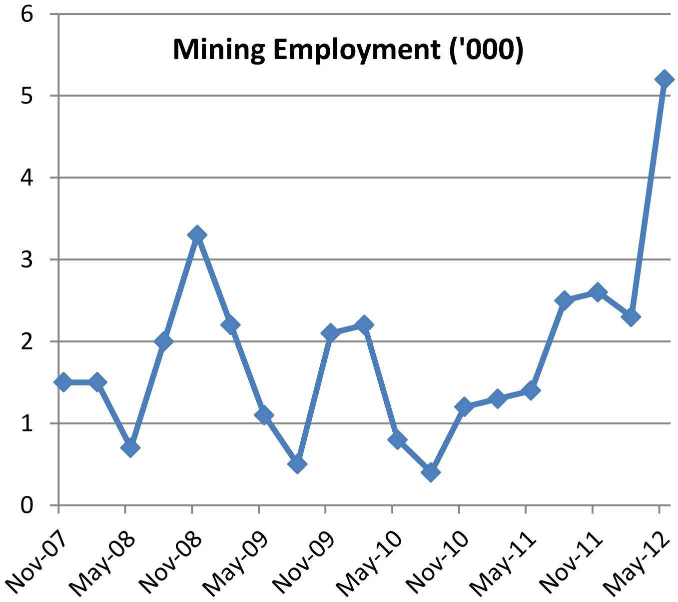
Sunshine Coast Mining

Although there is no mining activity directly in the region, the Sunshine Coast is playing an increasingly important role as a service centre and a base for Fly In Fly Out (FIFO) workers and also for mining support businesses.

Employment in the Sunshine Coast mining sector has significantly increased to just over 5,000 workers in the past 12 months.

With the cost of providing accommodation in the mining regions well documented, FIFO is expected to grow; the Sunshine Coast's desirable location makes it an appealing solution.

CHART 17 SUNSHINE COAST MINING EMPLOYMENT MAY 2012

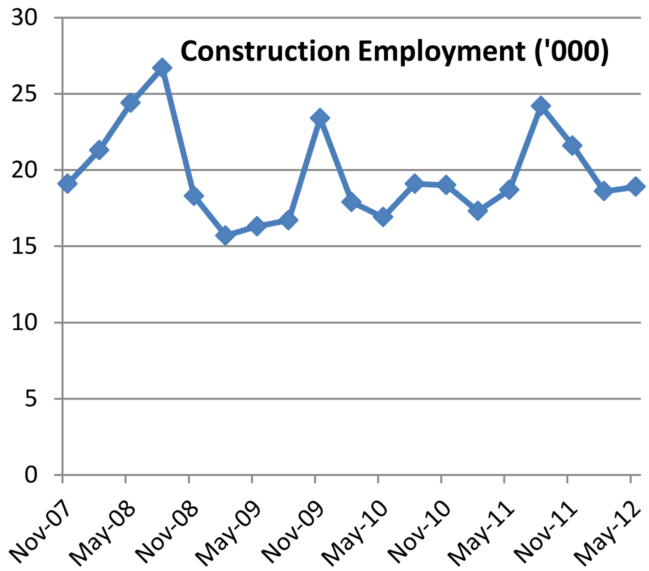


Source: ABS Regional Labour Force Data

Sunshine Coast Construction

Construction is one of the major industries on the Sunshine Coast and currently employs 18,900 workers. Although this is below the peak from earlier years, it has remained fairly constant due to the region's continued population expansion.

CHART 18 SUNSHINE COAST CONSTRUCTION EMPLOYMENT MAY 2012

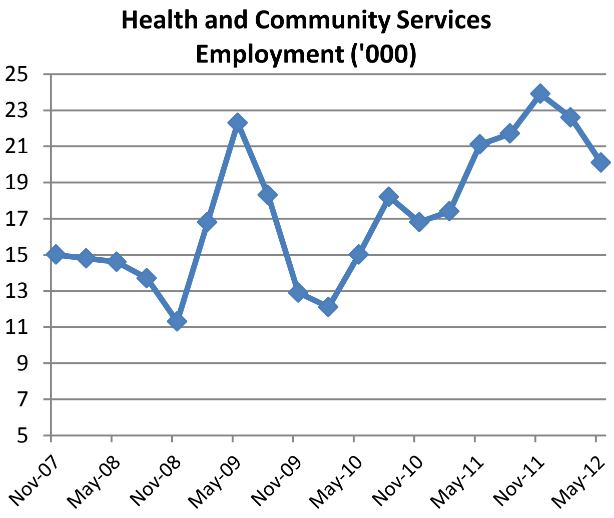


Source: ABS Regional Labour Force Data

SUNSHINE COAST HEALTH AND COMMUNITY SERVICES

Health and community services is one of the largest sectors on the Sunshine Coast with 20,100 people employed in this sector. The chart below shows that numbers have been steadily increasing. Since 2007 this sector has increased by 34% on the Sunshine Coast.

CHART 19 SUNSHINE COAST HEALTH AND COMMUNITY SERVICES EMPLOYMENT MAY 2012

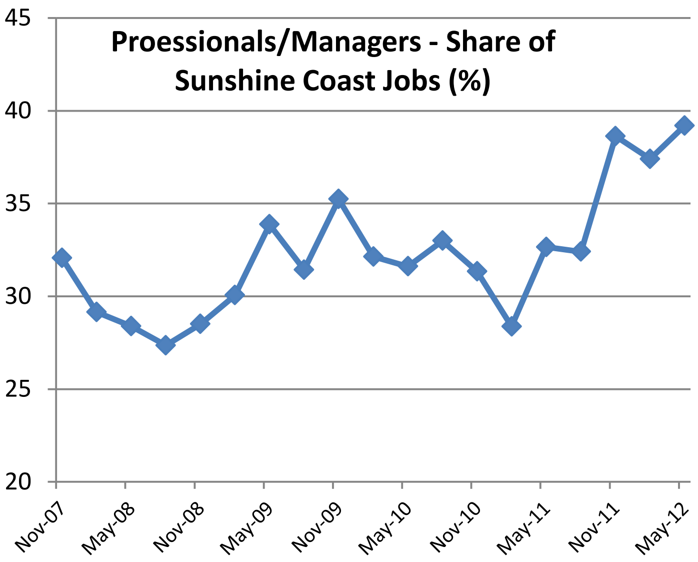


Source: ABS Regional Labour Force Data

SUNSHINE COAST OCCUPATIONS

The skill level of the workforce is increasing, with professionals and managers accounting for a higher share of the overall Sunshine Coast workforce. In May 2012, 39.2% of the region's workforce was classified by the ABS as either managerial or professional.

CHART 20 SUNSHINE COAST PROFESSIONALS/MANAGERS SHARE OF EMPLOYMENT MAY 2012

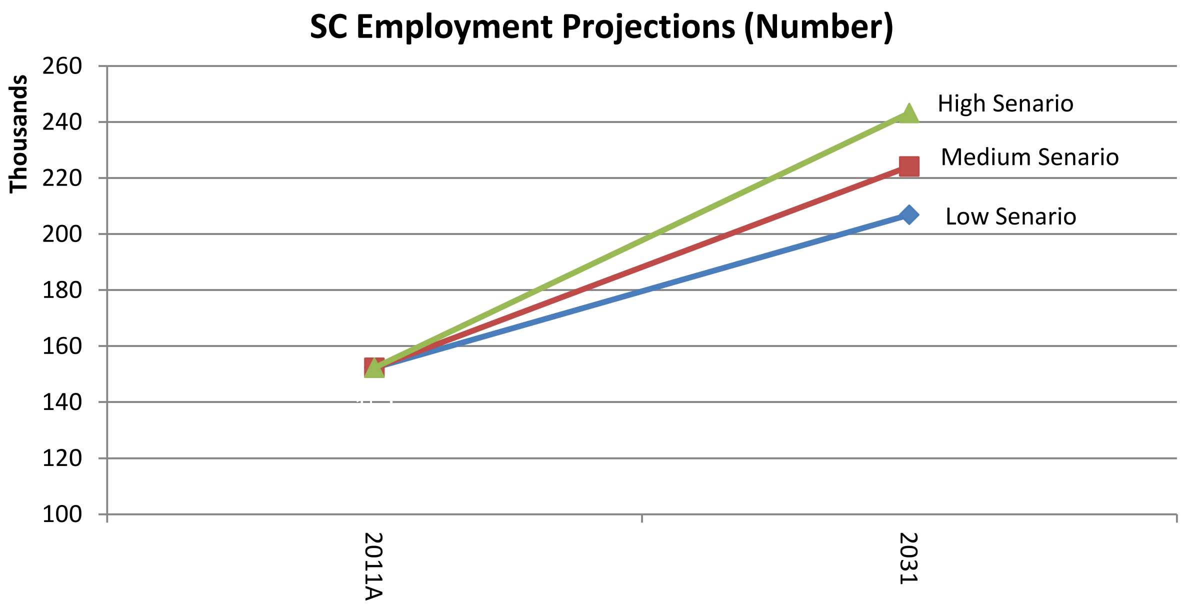


Source: ABS Regional Labour Force Data

EMPLOYMENT OUTLOOK FOR THE REGION BASED ON CURRENT POPULATION PROJECTIONS

EMDA has developed employment scenarios for the Sunshine Coast under each population scenario, based on data from the ABS and other government agencies (Chart 21 Regional employment projections).

CHART 21 REGIONAL EMPLOYMENT PROJECTIONS



Source: EMDA Future Coast Model based on small trend decline in labour force participation rates from ABS labour force data as the population ages.

Under each population scenario, the number of people employed on the Coast is forecast to increase substantially. Population increases will ideally need to be more aligned with the working age population to facilitate such employment growth, therefore providing a greater pool of workers. Infrastructure will also need to keep pace.

The Sunshine Coast Digital Economy

The digital economy is defined as online participation and engagement by households and business. It is expected to provide new business development opportunities ranging from merchandise trading to education services and community benefits such as better health and aged care services.

The Sunshine Coast is well placed to benefit from the continued growth in the digital economy. Already 85,167 households (73% of occupied households. Source: 2011 Census) are connected via broadband with a total 78.9% of occupied households having some form of internet connectivity. This is higher than the national average of 76.8% in total and 69.9% for broadband. Although data on the business use of information technology is unavailable at the Sunshine Coast level, the recent 2009-10 ABS report on internet commerce shows that at the national level it is becoming much more significant with 24.8% of all businesses receiving an order via the internet (source: ABS Business Use of Information Technology 2009-10). As part of the response to this growing opportunity (which will be enhanced by the National Broadband Network), Sunshine Coast Council has created the Sunshine Coast Business and Technology Precinct located next to the Sunshine Coast University. This precinct is expected to assist in providing a knowledge driver economy, high value job opportunities, maintain the region's attributes and assist in diversifying the economy.

Environmental profile

Recreation space

The Sunshine Coast is well endowed with natural environment areas, with almost 120,000 hectares considered open space which contributes to the relaxed community lifestyle. As a key regional attraction it includes public and privately owned land, parks, trails, reserves, bushland, beaches and waterways.

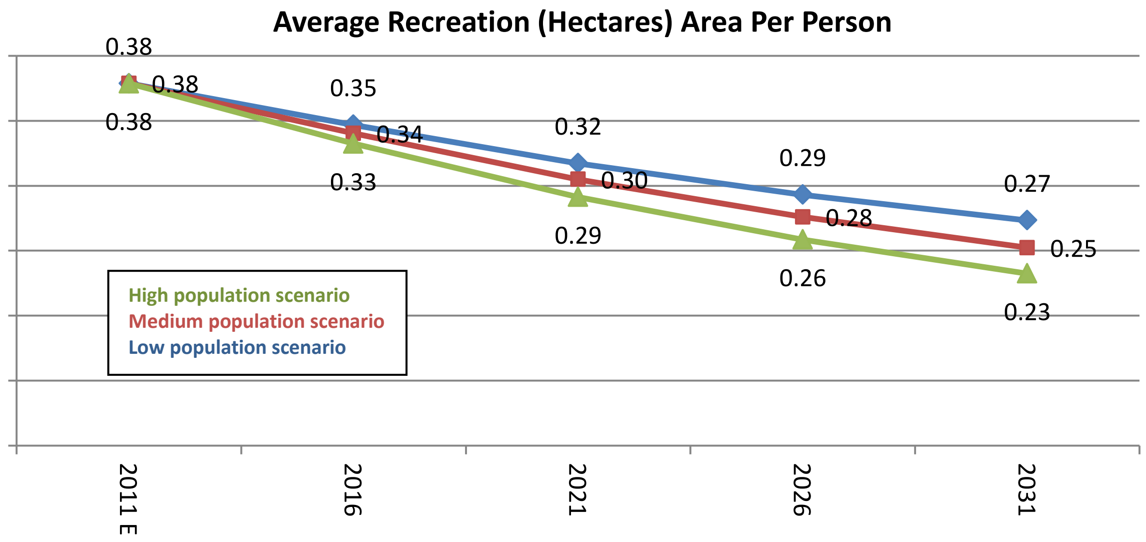
The region's beaches are a major tourist attraction with an estimated 5.5 million beachgoers annually (SCC Community Planning Fact Sheet 13).

With a diverse range of geographical, geological and topographical features, the Sunshine Coast is becoming increasingly renowned as a centre of biodiversity richness. This has been recognised in the Noosa Biosphere Reserve, a UNESCO-recognised conservation area.

Approximately 20,000 hectares is managed by Sunshine Coast Council and the community for environmental, recreational and social purposes. Approximately one third of the total Sunshine Coast regional area consists of native vegetation, with around half of this vegetation on private land. Council has purchased more than 4,000 ha of this land for conservation purposes.

However, the projected strong population increases will place considerable pressure on these natural areas. Chart 22 Average recreation (hectares) area per person
shows that the available natural area per person could diminish considerably. Under the high scenario, natural environment per person could fall to 0.23 hectares per person by 2031, compared to 0.38 hectares per person now. Even under the low scenario, the recreation space could fall to 0.27 hectares per person.

CHART 22 AVERAGE RECREATION (HECTARES) AREA PER PERSON

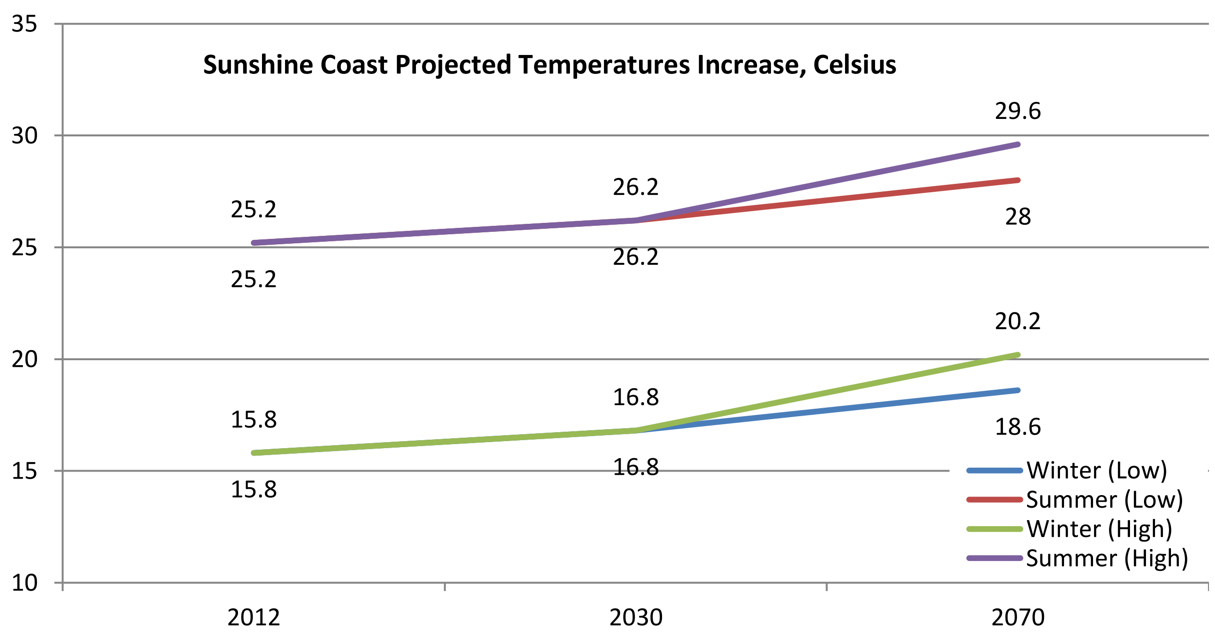


Source: EMDA *Future Coast* Model, derived from open space area (120,000 hectares and assumes there is no change in available area).

CLIMATE CHANGE

The Sunshine Coast is expected to experience a number of changes due to climate change. As the chart below shows, average temperatures on the Sunshine Coast are expected to rise into the future. Under a high emissions scenario, mean summer temperatures are expected to rise by 3.4 degrees by 2070 (under the CSIRO best estimate scenario). Under a low emissions scenario, mean temperatures are forecast to increase on the Coast as shown below.

CHART 23 PROJECTED TEMPERATURES – SUNSHINE COAST



Source: Derived from CSIRO Climate Change in Australia 2007, best estimate temperature change for Australia applied to current Sunshine Coast average temperatures (Bureau of Meteorology)

According to the Sunshine Coast Council Climate Change and Peak Oil Strategy 2010-2020, climate change is expected to cause changes to the Coast's environment including:

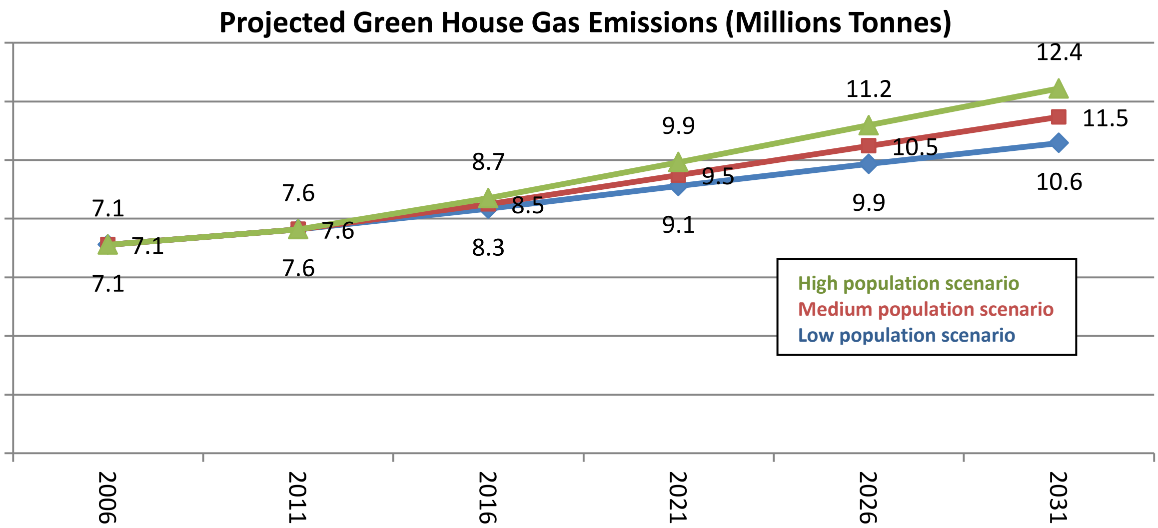
- Reductions in annual rainfall.
- Fewer days per annum when rainfall can be expected to occur.
- Shifts in mean seasonal rainfall.
- Shifts in mean monthly rainfall.
- Changes in the intensity and frequency of extreme rainfall events.
- Sea levels are also expected to rise.

Such impacts, especially sea levels rising and the increased likelihood of more extreme weather including flooding means the land available for further urban development, especially close to the coast, may be even more restricted.

PROJECTED EMISSIONS

Chart 24 identifies the increases in greenhouse gasses that could be expected from further population increases. Total greenhouse gas emissions are forecast to grow under each scenario, which assumes that current levels generated per capita do not increase. Under the high scenario, emissions almost double by 2031 due to population increases.

CHART 24 SUNSHINE COAST CURRENT AND PROJECTED GREENHOUSE GAS EMISSIONS



Source: EMDA *Future Coast* Model, based on current Australia per capita production of 24.1 tonnes per person per annum (Source: Australia Greenhouse Accounts Dec. 2011) and assumes no change per capita.

WATER RESOURCES

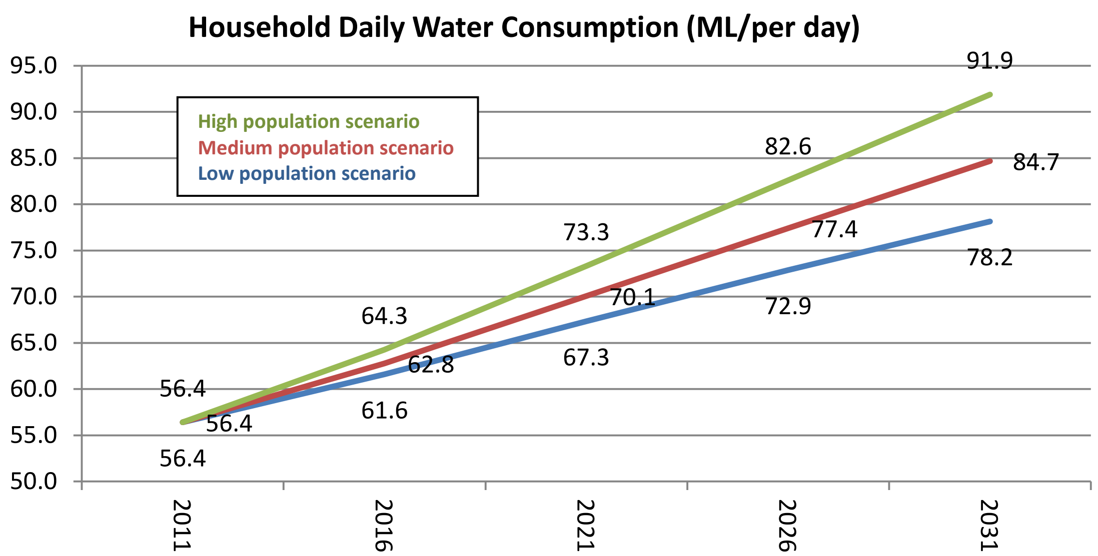
The reductions in annual rainfall due to climate change will also place pressure on the Coast's water resources.

Current dams on the Sunshine Coast are Lake Macdonald, Baroon Pocket, Cooloolabin, Poona, Ewen Maddock and Wappa, each one controlling the release of water downstream. The Mary River intake also supplies water to the region.

Chart 25 Average daily water consumption (ML/per day) on the Sunshine Coast was 178 litres per person in May 2012; this figure was used as the average for future projections. (Note: the daily water consumption per person on the Sunshine Coast was more than 300 litres before changes were made in consumption).

The chart shows that household demand for water will grow strongly if the population growth scenarios eventuate. By 2031 water consumed by households under the high population increase scenario is projected to nearly double to 91.9 ML/per day. Even under the low scenario, water consumption could increase to 78.2 ML/per day.

CHART 25 AVERAGE DAILY WATER CONSUMPTION (ML/PER DAY)



Source: EMDA Future Coast Model – based on data from water agencies

It is unlikely that the increased demand for water could be met by new dams. The Coast has already experienced difficulty in getting new dams approved, with the proposed Mary Valley Dam shelved. Future water needs are more likely to be met by developing new water catching and saving technologies, rather than relying on new dam construction.

EDUCATION PROFILE

The Sunshine Coast currently has 88 schools, two Universities and five TAFE campuses contributing towards educational opportunities in the region.

The University of the Sunshine Coast (USC), located centrally at Sippy Downs, provides more than 100 degree programs in undergraduate and postgraduate study and employs almost 500 staff. More than 8,300 students are enrolled across the faculties of Arts and Social Sciences, Business, and Science, Health and Education. Central Queensland University (CQU) has a campus located at Noosaville, offering a selection of study programs.

These universities actively partner with local industries and businesses through various research programs to provide important links between students and the workforce. USC also partners with local Year 11 and 12 high school students to enrol in university courses to prepare them for a university career.

There are also further education opportunities offered to Sunshine Coast communities through less formal channels such as the University of the Third Age. SCC has recognised the importance of informal and community education learning opportunities and has established an Adult Learning Cooperative offering a variety of adult classes, and conducts learning activities through council libraries (SCC Community Planning Fact Sheet 9).

The Australian Bureau of Statistics 2006[7] and Sunshine Coast Community Profile, show the following levels of qualifications in the Sunshine Coast area:

- The Sunshine Coast has similar levels of people with post-school qualifications to south-east Queensland and Queensland.
- A smaller percentage of people in the Sunshine Coast attend university (2.2%) compared to south-east Queensland (4.2%), but there was no difference with Queensland as a whole. However, in 2010 the University of the Sunshine Coast had a record intake of students (more than 3000) therefore this trend could change.
- Between 2001 and 2006 there was an increase in the number of people with non-school qualifications on the Sunshine Coast. Higher trade-based populations in the region could be a reason for low numbers of university graduates.

Education plays an important role in community development and there is already some anecdotal evidence that the school system is close to capacity. Based on the population scenarios, a substantial investment will need to be made in education facilities to keep up with the possible demand.

HEALTH PROFILE

The region is serviced by three public hospitals (Nambour, Caloundra and Maleny) and five private hospitals. A new $1.57 billion, 450 overnight bed tertiary level hospital and a $60.8 million medical training and research centre is planned for Kawana to improve health services on the Sunshine Coast. As the centrepiece of the Kawana Health Campus, the Sunshine Coast University Hospital will be a teaching and research facility offering the community a higher level of more specialised health services. The centre will have the capacity to train 1300 doctors, nurses and allied health professionals every year to staff local hospitals.

Nambour General Hospital (NGH) is the main referral hospital on the Sunshine Coast and provides a range of services including specialist and acute care services. The small size (bed numbers and clinical support services) and limited service capability at Caloundra, Noosa, Gympie and Maleny hospitals limits the role these facilities can play in expanding service capacity and capability.

There is already evidence that the hospital system is having difficulty coping with the growing demand for services on the Coast:

- Patients at NGH experience long waiting times and the hospital has consistently high occupancy levels.
- There is significant flow of Southern Cluster (and its broader catchment) residents to Brisbane hospitals for care. Southern Cluster residents also access fewer health services (in any location) than is expected, compared to the rest of Queensland (indicated by a low Relative Utilisation score). These factors highlight the need for an adequate and appropriate mix of clinical

[7] *2011 Census data in this category was unavailable at the time of writing*

services and more effective arrangements for delivering services locally. Service areas where analysis indicates that Sunshine Coast residents have lower access than the state average include dermatology, endocrinology, gastroenterology, rehabilitation, palliative care and geriatric management (Queensland Government 2010).

It is already anticipated that the undersupply will worsen until the Sunshine Coast University Hospital is operational in 2016.

The Sunshine Coast-Wide Bay Southern Cluster Projected Inpatient Bed Requirements shows that by 2022 the region's current capacity of 592 beds would need to increase to 1,187 beds, an increase of 595. To meet this need the Sunshine Coast University Hospital is planned to be expanded to 738 beds by 2021 (Queensland Government 2010). This will also extensively alleviate the outflow to Brisbane.

The Sunshine Coast's ageing population will have an impact on the need to plan appropriate health services and infrastructure for the region. The current population aged 65 + is 18%. It is estimated that by 2026 this will increase to 21.8%, while the population aged 85+ is expected to almost treble.

An active and healthy community is resilient and enhances the quality of people's lives. A number of programs are planned or underway to increase population health and physical activity outcomes on the Sunshine Coast. These programs were triggered by a series of poor health indicators, including a higher rate of musculoskeletal system disease and mental and behavioural disorders than the Australian population. The major causes of death and illness on the Sunshine Coast include coronary heart disease, stroke, chronic obstructive pulmonary disease, depression and lung cancer (SCC Community Planning Fact Sheet 8).

Sunshine Coast Council plans to undertake a targeted program to increase health and physical activity outcomes in the five higher scoring areas of socio-economic disadvantage on the Sunshine Coast. Generally such areas often have a higher aged population, unemployment, Aboriginal and Torres Strait islander communities, diabetes, obesity, poor diet, smoking and lower physical activity.

SCC has endorsed a Wellbeing Charter for the Sunshine Coast, with the goal being an active and healthy community that is resilient and enhances the quality of people's life. Regional Development Australia Sunshine Coast will support initiatives and partnerships that contribute to wellbeing, and healthy and active communities.

TRANSPORT PROFILE

Transport demand has been growing strongly, as can be expected in a region that has also been growing strongly in terms of GRP growth and population increase. There are signs that infrastructure is having difficulty coping with the current demand:

- Currently, private motor vehicles are used for the majority of trips on the Sunshine Coast (for example, approximately 90% of Sunshine Coast residents' trips to work were made by private vehicle (ABS, 2006). This trend places ongoing pressure on the local and State-controlled road network to manage demand during peak times).
- Visitors and prospective visitors are saying that congestion on the Bruce Highway is a deterrent.
- Seasonal car parking congestion, especially around Noosa Heads and Mooloolaba, is well documented.
- The Sunshine Coast Airport is also reporting the need to expand to meet demand (Sunshine Coast Operational Plan 2010/2011).

Continuation along this trend (high reliance on the motor vehicle and strong population increases) is likely to lead to the following outcomes for the region:

- Unrelenting pressure for more and wider roads, with consequential loss of natural areas and amenities, more congestion, an urbanised big city feel and a loss of the Sunshine Coast's unique lifestyle qualities.
- Loss of the lifestyle attraction and key competitive edge of the Sunshine Coast for economic development.
- Increased greenhouse gas emissions.

A number of initiatives are proposed to alleviate some of the demand, including:

- Major network additions (e.g. the proposed CAMCOS public transport corridor, North Coast Rail duplication and the Multi Modal Transport Corridor).
- TravelSmart programs.
- Sustainable transport energy sources (e.g. electric, hydrogen, hybrid, biodiesel and fuel cells).
- Upgrade of the Bruce Highway.
- Expansion of the Sunshine Coast Airport.
- Additional high order road network connectivity to occur in conjunction with major new development areas.
- Parking charges in selected areas

However, even these would not adequately meet the projected demand under each population scenario and more infrastructure would be required to meet the needs of a substantial population increase.

TOWARDS A SUSTAINABLE AND PRODUCTIVE REGIONAL ECONOMY

The Sunshine Coast is moving into its third phase of development to a large regional economy with a broad economic profile. The core driver of the growth has been the strong population increases over many years, which has seen the region double in size in just under 20 years.

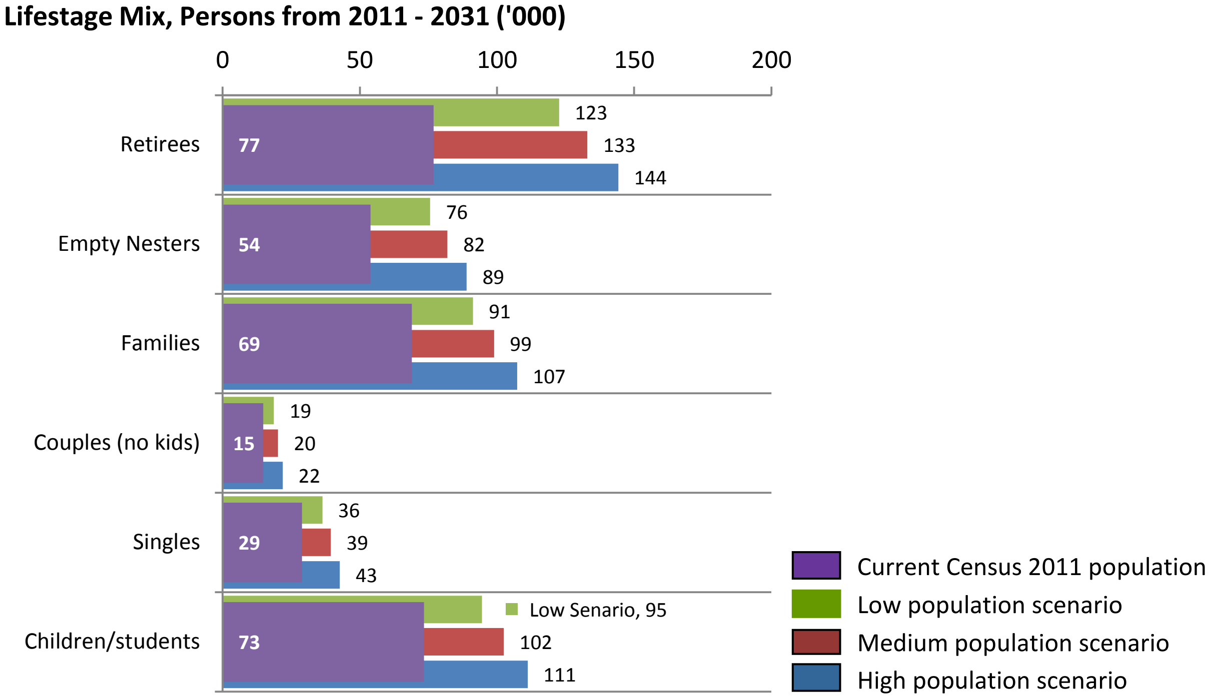
This strong growth has come at a cost. There are signs the current infrastructure is having difficulty coping with the existing demand and there is a strong push from the community to limit the rate of growth to a sustainable level.

The forward population projections and the matching resource requirements clearly illustrate the challenges faced by the region. Even under the low growth Queensland Treasury population projection, population is expected to increase to 439,100 (an additional 122,242 people by 2031). This will place even more pressure to further substantially develop infrastructure across all areas, for example health, education, transport and water.

To illustrate this point further the population model includes lifestage projections that demonstrate the need for change.

The lifestage projections in Chart 26 Sunshine Coast lifestage mix, 2031
identifies all segments will grow on the Coast over the next 20 years, particularly the older age groups (empty nesters and retirees). The key strategic economic issue is how to manage this population increase so that it is sustainable and provides the Coast with a vibrant population base that is economically productive.

CHART 26 SUNSHINE COAST LIFESTAGE MIX, 2031



Source: EMDA Future Coast Model based on ABS and OESR data

Employment opportunities

The Sunshine Coast requires suitable employment to be generated for the key lifestage sectors, including key employment growth areas for families. The types of jobs created will also need to be attractive for these segments i.e. family-friendly, good wages and opportunities for advancement. Attracting singles and couples will also require opportunities for this segment to improve their skills and assist them in promotion opportunities (Keep Australia Working Sunshine Coast-Moreton Bay 2010).

In addition, a greater emphasis will be needed to reduce the level of youth unemployment and actively work toward a target unemployment rate below the state average. Another area requiring focus is working with the business community to use the skills and experience available in the older demographic groups. Many people close to retirement or semi-retired in this region have exceptional skills and experience that could be better used. There is also value in increasing opportunities for the older population to take on new skills and learning opportunities that can lead to employment options.

State of the Region Summary

The Sunshine Coast is a very successful economy and is moving into its third phase of development to a large regional economy that has a broad economic profile. Despite the GFC, the population has continued to grow and this has been a core driver of the growth.

This strong growth has come at a cost. There are signs that the current infrastructure is having difficulty coping with the existing demand, and there is a strong push from the community to limit the rate of population increase to a sustainable level. Strong growth in the region has also had its impact on the environment with losses in vegetation, wetlands and water quality.

It is clear that an alternative regional development model is required, one that provides sustainable growth and opportunities for the region, but does not result in the region becoming a victim of its own success.

ATTACHMENT A – GOVERNMENT STRATEGIC CONTEXT

This section outlines government policies, strategies and plans that have contributed to this document. RDA Sunshine Coast values informed, knowledge-based decision making and working in partnership with relevant industry bodies and government agencies. The vast literature is a tribute to the hard work and dedication of these bodies; RDA Sunshine Coast acknowledges their contribution to the Roadmap.

Australian Government

Australia to 2050: Future challenge – the 2010 intergenerational report
This report provides a comprehensive analysis of the challenges that Australia will face over the next 40 years. Its key conclusion is that an ageing population and climate change present significant long-term risks for the economy and the sustainability of government finances. These issues have particular relevance to the Sunshine Coast and pose questions around the region's economic and environmental sustainability, living patterns and lifestyle.

National Broadband Network Policy
In April 2009 the Australian Government announced it would establish a new company to build and operate a high speed National Broadband Network (NBN), the single largest nation-building infrastructure project in the nation's history. The NBN is critical to the Sunshine Coast's future productivity and maintaining or building competitive advantage. It brings together a range of educational, social, physical and economic enablers that will create innovative, knowledge-based industries and drive a dynamic, prosperous future economy.

Sustainable Population Strategy
This strategy seeks to ensure that future population change is compatible with the nation's economic, environmental and social wellbeing for current and future generations. It recognises that population change is not only about the growth and overall size of our population; it is also about the population's needs and skills, how we live, and where we live. The strategy recognises that population change impacts different communities in different ways.

Our Cities, Our Future – A National Urban Policy for a productive, sustainable and liveable future
This framework recognises that the needs of current and future generations must be met to secure the ongoing prosperity and wellbeing of regional communities. We must ensure that economic growth can be sustained and increased without compromising the natural environment or our quality of life. RDA Sunshine Coast has a role in planning for, and delivering, a region that that is more productive, sustainable and liveable.

Priority Area Employment Initiative (Previously Keep Australia Working Initiative)
The PAEI Local Employment Coordinator has developed a Sunshine Coast regional employment plan to secure economic benefits for priority employment areas. It has identified six goals, supported by specific short and medium-term strategies to maximise employment opportunities created by the Nation Building – Economic Stimulus Plan. This includes a focus on diversifying the region's economic base, strengthening major industries and developing skills supply for future needs.

Queensland Government

Queensland Health Strategic Plan 2007-2012

The Strategic Plan outlines Queensland Health's mission, values, operating principles, strategic challenges and priorities. These priorities will filter down to the local service level in the form of district operational plans, partnership agreements, divisional operational plans, business unit/project plans and individual staff development plans. The real opportunities and challenges are not only with the hospital, but with opportunities for primary care and providing a quality, compact, high energy urban lifestyle to attract health workers to the region.

Queensland Health Population Health Plan 2007-2012

Queensland Health aims to deliver the best health services nationally, improving the population's health and wellbeing and reducing the health status gap between the most and least advantaged in the community. This will require increased funding allocated to the Prevention, Promotion and Protection Program, the introduction of new and enhanced services, additional workforce and infrastructure. The Plan responds to the strategic service reforms contained in the *Queensland Statewide Health Services Plan 2007-2012* and the direction articulated in the *Queensland Health Strategic Plan 2007-2012*.

South East Queensland Regional Plan 2009-2031

The purpose of this plan is to manage regional growth and change to protect and enhance the region's quality of life. It addresses emerging regional growth management issues such as continued high population growth, housing affordability, transport congestion, climate change and employment.

South East Queensland Infrastructure Plan and Program 2010-2031

This plan outlines the Queensland Government's infrastructure priorities to support the *SEQ Regional Plan 2009-2031*. It establishes priorities for regionally significant infrastructure over the next four years and outlines the longer term planning horizon to 2031. With the Sunshine Coast's rapid population growth, the government's strategy toward infrastructure is key to providing effective advocacy and identifying opportunities.

The Queensland Tourism Strategy 2006-2016

This Strategy identifies key themes and strategic actions for the development of a sustainable tourism industry in Queensland until 2016. It identifies that regional investment and infrastructure are integral to driving long-term growth across the tourism sector.

Local Government – Sunshine Coast Council

Planning for a sustainable Sunshine Coast: a statement of proposals for the new planning scheme

The statement of proposals sought community input on the key principles and directions for the new planning scheme which will replace the *Caloundra City Plan 2004*, *Maroochy Plan 2000* and the *Noosa Plan 2006*. This document discusses accessibility and connectedness, innovation, creativity and great governance.

Maroochydore Structure Plan

The Maroochydore Principal Activity Centre (PAC) Structure Plan provides an integrated land use, infrastructure and master planning framework for about 200ha of land in central Maroochydore. The Plan creates employment opportunities through the allocation of 150,000m2 of new commercial floor space and allocates 65,000m2 of new retail floor space by 2031. The report mandates sub-tropical design that embraces Maroochydore's unique sub-tropical, coastal and waterfront qualities.

Economic Development Strategy 2009-2014

The aim of this strategy is to enable the creation of wealth and jobs across a diverse economic base by building the economy so that the Sunshine Coast is more resilient to peaks and troughs of the economic cycle. It aims for its business, infrastructure and technology to gain a reputation for sustainability and success, both nationally and internationally.

Sustainable Transport Strategy 2011-2031
The Strategy outlines Council's emerging priorities and key strategies to deliver a sustainable transport system, which increases the share of trips made by public and active transport. It presents a policy framework and action plan for servicing the region into the future.

Sunshine Coast Tourism Opportunity Plan 2009-2017
The purpose of the Tourism Opportunity Plan is to provide a direction for the sustainable development of tourism for the Sunshine Coast by informing State and Local Government planning processes and the Destination Management Plan (DMP). The DMP identifies one of its key strategic priorities as 'well planned infrastructure' where there is a focus on improved communication and inclusion of the tourism industry in planning for infrastructure development in the region.

Waterways and Coastal Management Strategy 2011-2021
This Strategy provides a framework and direction for management of the region's natural waterways, constructed water bodies and coastal foreshores, which are a vital part of the region's natural capital, underpinning its identity, prosperity and lifestyle.

Affordable Living Strategy 2010-2020
This Strategy highlights the need to improve housing diversity and affordability within self-contained neighbourhoods. It also promotes improved transport choices with better housing and resource efficiency, which in turn will improve access to essential facilities and services and help create opportunities for all residents.

Open Space Strategy 2011

This Strategy provides a framework and policy direction for the planning and management of Council's open spaces. It informs the preparation of the new Sunshine Coast Planning Scheme including the Priority Infrastructure Plan, subsequent Infrastructure Charging Schedules, new infrastructure agreements and Capital Works Programs including land and embellishment.

Social Infrastructure Strategy 2011
The Strategy provides a framework and direction for Council's social infrastructure and informs the preparation of the new Sunshine Coast Planning Scheme, including the Infrastructure Charges Schedule and new Infrastructure Agreements.

Sport and Active Recreation Plan
The Plan guides the provision of facilities and services to meet the needs of the Sunshine Coast's diverse communities over the next 15 years. It examines sport and active recreation activities only, defined as those which have formal rules, scoring, event organisation and administration structures. It closely aligns with Council's Open Space Strategy which will articulate council's commitment, role and intent in the provision and embellishment of recreation parks and sports reserves across the region.

Biodiversity Strategy 2010-2020
This Strategy aims to ensure the region's biodiversity is protected, enhanced, healthy, resilient to climate change and valued by the community. An effective land management practice which protects and enhances the region's biodiversity presents challenges and opportunities for the Sunshine Coast, which must ensure a coordinated and focused approach towards the protection of biodiversity.

Climate Change and Peak Oil Strategy 2010-2020

The goal of this Strategy is to guide the transition to a low carbon, low oil and resilient future for the Sunshine Coast. Climate change and peak oil present major threats to the region, its natural environment, communities and economic activity. The Strategy ensures these issues are addressed as a high priority and provides environmental, social and economic resilience. It is backed by Council's *Corporate Plan 2009-2014* which acknowledges the need to tackle climate change and peak oil.

Energy Transition Plan

This Plan recognises that a global energy transition is occurring, driven by concerns about climate change and peak oil, which presents local challenges and opportunities for the region. The Plan identifies actions that will help prepare the Sunshine Coast for future energy challenges and opportunities. This Plan supports the Sunshine Coast Climate Change and Peak Oil Strategy 2010-2020, and details how council and the region can begin this transition and achieve a low carbon, low oil, and resilient future for the Sunshine Coast.

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