Regional Development Australia Gold Coast

Regional Plan 2013-2016

Regional Development Australia
GOLD COAST INC

An Australian Government Initiative

Queensland Government

Table of Contents

1. A message from the Chairman

I am pleased to present the 2013-2016 Regional Plan prepared by Regional Development Australia (RDA) Gold Coast Inc. This revised Regional Plan builds on the first version produced in 2011 and takes a fresh look at the issues facing our region and focuses on the key priorities and opportunities for strengthening and growing the Gold Coast economy.

The Regional Plan responds to the current circumstances facing the region and incorporates feedback from Gold Coast community leaders. In addition, it aligns with the Australian Government goal of supporting the regions, the State Government's focus on growing a Four Pillar Economy through focusing on tourism, agriculture, resources and construction, cutting red tape, regulation and driving job opportunities. It also aligns with the City of Gold Coast's Economic Development Strategy.

As a direct result of continuous community consultation and the Regional Leaders' Forum in late 2012 that was attended by over 200 delegates, responses from a wide cross section of the community, business and government sectors are incorporated into this updated document.

This Regional Plan is intended to:

- Provide guidance for Federal and State Governments on the needs and priorities for the Gold Coast region so that appropriate policies, programs and initiatives can be put in place to directly address the local needs; and
- Focus the activities of local organisations, businesses, institutions and residents on the priorities for growth and development of the Gold Coast region.

This Regional Plan supports the research and forward planning of the City of Gold Coast, the Department of State Development, Infrastructure and Planning, in addition to other government agencies and organisations in the region.

The Regional Plan is a strategic planning document which is the result of RDA Gold Coast's consultation and collaboration with government, business, not for profit organisations and community leaders on how the Gold Coast could look in the medium to long term and on what the big issues are which will affect the region.

A separate body of work, the 2013 Regional Profile, details the economic analysis undertaken by RDA Gold Coast and supports this Regional Plan overall, in addition to supporting the identified RDA Gold Coast priorities for the Gold Coast: workforce; sustainable communities; digital innovation; investment and infrastructure; and economic diversity.

In order to overcome the challenges facing the region and to address the identified priorities, regional leadership in the form of a collaborative and outcomes-focussed approach is required. This is a key role which RDA Gold Coast and its committee can play.

A critical feature of this Regional Plan is collaboration and partnerships with government, business including the not-for-profit sector, education and the community. This collaboration is a key feature of the continued success of the Gold Coast as one of Australia's leading regions and the sixth largest city in Australia.

I encourage you to read this Regional Plan, provide us with your feedback and work with us to facilitate collaboration between stakeholders to achieve real growth and development of this region.

Craig Devlin

Craig Devlin
Chairman
Regional Development Australia Gold Coast

(L-R: Ian Pritchard, Anne Norton-Knight, Bernard Salt, Craig Devlin, Trina Hockley, Prof Paul Burton, Vivienne Mallinson)

Acknowledgements
Compilation of the 2013-2016 Regional Plan and 2013 Regional Profile was coordinated by Executive Officer, Ian Pritchard. A special thanks to participants in a number of community consultation events, forums and other community engagement activities organised by or supported by RDA Gold Coast over the past 12 months. The RDA Gold Coast Committee consists of Craig Devlin, Colette McCool, Jevena O'Brien, Stephen Simpson, Prof Paul Burton, Anne Norton Knight, John Jones OAM, Vivienne Mallinson, Trina Hockley and Kerrie Young. RDA Gold Coast has taken due care in preparing this document. However, noting that data used for analyses have been provided by third parties, RDA Gold Coast gives no warranty to the accuracy, reliability, fitness for purpose or otherwise of the information.

Cover photographs: Tourism & Events Queensland

www.rdagoldcoast.org.au
Level1, 7 Short Street, Southport Qld 4215
All postal correspondence to:
PO Box 3290, Australia Fair, Southport Qld 4215
P: 07 5583 5095 or 0431 402 919
RDAGC @RDAGoldCoast RDA Gold Coast

2. Executive Summary

Regional Overview

The Gold Coast has experienced several decades of very strong economic growth due to its high amenity surroundings resulting in significant interstate migration and tourism. This is turn has supported the development of population serving industries such as construction, retail, healthcare and business services.

However, the economic events of the past decade has resulted in a more complex picture, with the future economic drivers of the Gold Coast being quite different to what the region has historically relied upon. The traditional drivers of the economy will be challenged in future years as other economic drivers become prevalent. The resources boom combined with a high Australian dollar has impacted upon the competitiveness of trade-exposed industries such as tourism and manufacturing.

Strong economic drivers of the past are unlikely to provide the same level of economic stimulus for the Gold Coast's economy. The future drivers of the economy are expected to be around knowledge-intensive industries, and industries requiring new skills, business investment and infrastructure to ensure success.

A key part of the region's future economic success will be its ability to promote a more diversified economy, create long term employment opportunities and to be able to accommodate the needs of an ageing population.

Economic Indicators Overview

	Gold Coast	South East Queensland	Queensland
Jobs (2011)	184,584	1,570,350	2,297,600
Past 5 year annual growth rate	1.4%	1.1%	1.4%
% of State employment	8%	68.4%	100%
Resident workers (2011)	233,943	1,455,417	2.052,230
Past 5 year annual growth rate	2.6%	2.4%	2.3%
Unemployment rate (2013)	5.61%	5.65%	5.79%
Participation rate (2013)	60.9%	63.2%	62.2%
Gross Regional Product (2011)	$20,262m	$196,894m	$280,622m
Population (2011)	513,954	3,163,711	4,474,098
Past 5 year annual growth rate	2.0%	2.0%	1.8%
% of State population	11.5%	70.7%	100%
% aged 15 – 56 years	67.6%	67.5%	67.1%
% with tertiary qualifications	34.2%	35.5%	34.0%

Source: ABS, NIEIR, 2013

Overview of Gold Coast's Strengths, Challenges, Needs and Opportunities

Strengths

- The Gold Coast has a well-developed tourism industry and infrastructure and is an internationally recognised holiday destination, and it is well positioned geographically within an easy drive of both Brisbane and New South Wales. It is well served by an international airport and with good transport links and infrastructure.
- It also offers a favourable lifestyle and climate with access to natural resources such as beaches, waterways and rainforest, and access to sufficient medical and educational resources.

Challenges

- A challenge for the Gold Coast is how to diversify its economy in order to reduce its reliance on tourism, retail and construction, and also to change the perception of the Gold Coast from being solely a "fun" destination to one which is a serious place in which to do business. A high proportion of the region's workforce is employed outside of the region, so the creation of long term and stable employment in the region is a key challenge.
- An ageing population and a young population forced to relocate from the Gold Coast because of a lack of employment prospects, will impact upon the health care services and the level of economic contribution by employees in the region.
- High car dependency, isolated suburbs, limited affordable housing, areas of social disadvantage and a perception of increasing criminal activity are some of the social challenges facing the region.

Needs

- From a workforce perspective, the needs of the region are for more jobs, greater employment stability, more economic diversification, and investment attraction initiatives to create and attract new industries. A perception shift from a holiday and retirement destination to a viable business and commercial centre is a prerequisite for the region's evolution to a maturing city.
- The social and economic impacts of commuting daily to Brisbane is significant, hence a recent emergence of co-working on the Gold Coast. Greater government support of this initiative could retain a greater number of workers in the region.

Opportunities

- The opportunities for engaging with emerging industries such as bio-technology, creative industries, and allied health are apparent given the region's strong education infrastructure and the new Gold Coast University Hospital.
- The Commonwealth Games will be a significant enabling project for the region which will not only attract new and upgraded infrastructure, but will also give the region the opportunity to increase its profile in an international arena.
- The light rail project which will commence operations mid 2014 will provide a stimulus to urban regeneration and development, and will also change the way in which Gold Coast residents travel.

- In terms of workforce movement, there are two significant opportunities: one is the promotion of the region as a FIFO hub - RDA Gold Coast has recently commissioned a study by Bernard Salt of KPMG to analyse the long distance commuter sector; the other is the promotion of the co-working movement in the region where several co-working centres have recently been established. RDA Gold Coast has collaborated with other South East Queensland RDAs to undertake a major project in co-working.

Regional Priorities

The identified priorities for the region are for the term of this Regional Plan and beyond are:

1. **Workforce**
    - Education and training
    - Workforce skill development
    - Fly In Fly Out hub

2. **Sustainable Communities**
    - Public transport
    - Accessible healthcare
    - Disability access
    - Positive image and branding
    - Land planning and development
    - Urban space and community infrastructure development
    - Affordable Housing
    - Community connectedness
    - Social inclusion
    - Environment
    - Social enterprise

3. **Investment and Infrastructure**
    - Land planning and development
    - Urban space and community infrastructure development
    - Town planning
    - Reduced regulatory burden
    - Commonwealth Games legacy
    - Light rail and stage 2 extension
    - Art, sports and cultural events

4. **Economic Diversity**
    - Education
    - Healthcare
    - Creative industries
    - Asian century
    - Bio-technology
    - Entrepreneurship
    - Competitiveness
    - Innovation

5. **Digital Economy**
    - NBN
    - Co-working
    - Intelligent city status
    - Wi-Fi hotspots

What Makes The Gold Coast Unique?

Gold Coast is Australia's sixth largest city by population and the largest non-capital city. As such it is perceived neither as a capital city, nor as a regional city. Its topography, being a long thin strip bordered on either side by the sea and by hinterland has created a collection of interspersed suburbs rather than a city with an identifiable centre. Its attraction as a place of residence based on lifestyle and climate makes it also unique, as does the fact that 26,000 commuters make the daily trip to Brisbane, partly as a consequence of people making lifestyle choices, but also because of a shortage of employment opportunities on the Gold Coast. As a non-capital city, the Gold Coast is also unique in that it does not have any significant amount of agriculture other than a small area of cane farming in the north east of the region.

Further comparisons to other regions are made in section 5.

This Regional Plan aims to provide all stakeholders with an informative and accurate overview of the current and future trends, needs and priorities for ongoing growth and development of the region. It aims to assist in the tailoring of initiatives and resources to address regional priorities and needs, and to further enhance the region's appeal to investors and business migrants, thus ensuring continued sustainable economic growth.

RDA Gold Coast aims to continue to engage with all levels of government, business and local communities to identify practical projects and to influence the implementation of such projects to achieve sustainability for the City.

This Regional Plan is a practical, clear plan for the growth and development of the Gold Coast region. It provides practical solutions to the needs of the region and informs government of the priorities for the region. The Regional Plan encourages working together to build upon regional development strengths and opportunities.

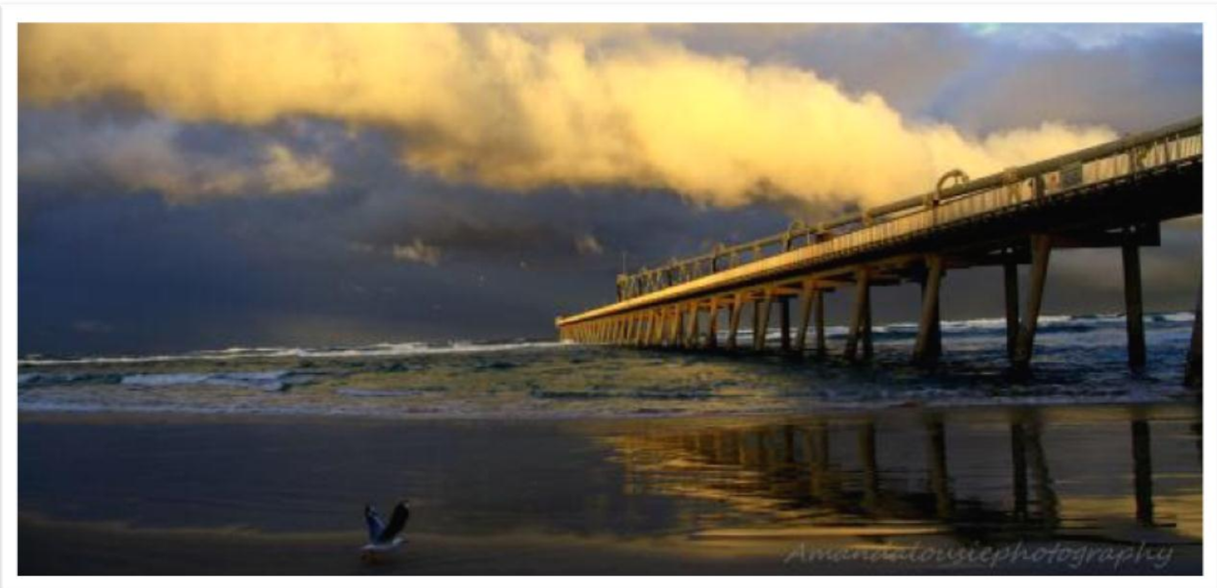


Photo: Absolom Photography www.absolomphotography.com.au

3. Vision for the Region

OUR VISION FOR THE GOLD COAST
To be a region internationally recognised and supported by a broad economic base, attractive to business and individuals and offers education, business and lifestyle opportunities

OUR GOALS FOR THE GOLD COAST	
A Connected City ***A city connected by sound infrastructure and providing access to employment and markets***	**A Digital City** ***A city that embraces technology and takes advantage of digital economic opportunities***
A Liveable City ***A city known for its safety, community well- being, social inclusion and natural and built amenity***	**A Competitive City** ***A city attractive to business, entrepreneurial culture with a skilled and educated workforce***

The RDA Gold Coast Committee's vision is reinforced by its long-term aspirational goals for the region, as shown at the diagram to the left.

In the 1950s there was no "Gold Coast". What we now know as the Gold Coast was a loose collection of some 20,000 residents spread along a 50km coastal strip from Coolangatta to Southport.

Today the Gold Coast is Australia's sixth largest city and the nation's largest non-capital city.

Challenges for the region include retaining the attractiveness of the Gold Coast with its lifestyle opportunities, whilst fulfilling the demands of an increasing population by providing education, welfare, employment & investment opportunities for both existing and prospective residents.

New opportunities around education, knowledge, health and digital economies will emerge over the next ten years and the Gold Coast must have a workforce trained and ready to take advantage of these opportunities.

Economic diversification, attraction of new industries and business, the promotion of innovation and entrepreneurship, and the repositioning of the Gold Coast from merely a leisure destination to a serious place in which to do business and to invest are key strategies for the city to ensure sustainable prosperity, in addition to the traditional economic drivers of tourism, construction and retailing.

RDA has recently commissioned a skills shortage study to identify the skills required in the region over the next ten years. This study when completed with provide detailed analysis of employment opportunities, skills required to satisfy these opportunities, and will provide employers investors and educators a level of information, not previously available in the region. More details are contained on our website (www.rdagoldcoast.org.au).

Similarly, RDA Gold Coast is supporting a project in collaboration with the City of Gold Coast ("Council"), Gold Coast Airport and KPMG to promote the city as a FIFO (Fly In Fly Out) hub. With its international airport, lifestyle offerings and a skilled and trained workforce, which already demonstrates a propensity to undertake long distance commuting, the Gold Coast could provide an opportunity to service the resources sector far into the future. This will provide economic benefit to the region and allow long distance commuters to fly from the Gold Coast instead of travelling to Brisbane.

A recent study by KPMG demographics partner, Mr Bernard Salt, which was commissioned by RDA Gold Coast, (http://rdagoldcoast.org.au/news-and-events/news/bernard-salt-s-gold-coast-report/) has found that 26,000 commuters travel from the region to Brisbane daily. This compares to 18,000 commuting from Wollongong to Sydney daily.

The impact on communities, the environment and the local economy would be improved with a shift towards co working centres in the region. Several co working centres have emerged on the Gold Coast in the last 12 months and the Queensland Government is currently investigating centres as a means of decentralising employees.

RDA Gold Coast is collaborating with other RDAs in South East Queensland to understand the demand and supply of co working spaces and to create a business model to provide to employers, governments, investors and potential users to promote co working spaces and to improve their level of usage in the community. More details of the project are at: http://www.digitalworkhub.com.au/

The skills shortage study, the Digital Work Hubs project and the long distance commuter study are discussed in more detail in section 5.

Photo: Gold Coast Airport Corporation

Overview of the Region's Goals

A connected city

A long term vision is for the region's transport networks and services to be well connected and convenient. Walking, cycling and public transport will be viable options for getting around the city. Transport plays a major role in keeping us physically connected to work, leisure and services. Moving around the city and outside of the city with ease is important to the liveability of the Gold Coast and the sustainability of our environment.

A digital city

The Gold Coast will harness the resources and capabilities of its educational institutions, increasingly-educated workforce and enabling technologies such as the high speed broadband to take advantage of emerging technologies so as to be positioned as a modern economy and which businesses and residents embrace digital and communication technologies to produce better economic, educational and health outcomes for the city.

A liveable city

The Gold Coast for many years has been a destination of choice for people to settle in due to its obvious lifestyle attraction. The challenge of becoming Australia's largest non-capital city and addressing the urbanisation challenges whilst retaining its attractiveness and appeal to existing and potential residents is an essential goal for the region.

A competitive city

The Gold Coast will compete with other Australian and South East Asian destinations for business investment. Its liveability attractiveness provides a distinct advantage over other destinations, but the region will provide a climate conducive to investment, business start-up and innovation.

Photo: Tourism and Events Queensland

4. Role of the RDA

It is the role of RDA Gold Coast to promote and support government policy and to incorporate new policy and directions in its strategic planning process, with new priorities and actions reflecting the current policy settings. The new goals and priorities have been developed within this strategic context and in response to the needs of the community and stakeholders within a changing environment.

The RDA Charter states that RDA will be an important contributor to and driver of:

- Regional business growth plans and strategies, which will help support economic development, the creation of new jobs, skills development and business investment
- Environmental solutions, which will support ongoing sustainability and the management of climate change (including the impact of drought, flood or bushfires)
- Social inclusion strategies, which will bring together and support all members of the community.

Through collaborative leadership, advocacy and partnerships, RDA Gold Coast will contribute to regional priorities and support the regional vision by:

- Research – evidence based which supports the work of RDA Gold Coast
- Communication – stakeholders will be informers, and in return, inform RDA Gold Coast
- Engagement – with stakeholders, communities and governments
- Facilitation – with stakeholders and governments to achieve regional priorities
- Leadership – by being thought leaders and with a non-political agenda

Policy Context in which RDA Operates

Australian Government Priorities

The Council of Australian Governments (COAG) Regional Australia Standing Council (RASC) has established national approaches to regional development in order to facilitate collaboration and coordination between different levels of government. RASC has agreed to five key determinants of long term regional economic growth:

1. Human Capital, particularly education and skills
   Human capital is the stock of knowledge, expertise and abilities of a region
2. Sustainable Communities (economic, environmental and social) and population growth
   Sustainable communities refers to the ability of a region to endure in the long term. It has economic, environmental and social dimensions.
   Population growth refers to change in the size of a population over time, caused by migration and natural change through births and deaths
3. Access to international, national and regional markets

This refers to the ability to trade goods and services in a given market

4. Comparative advantage and business competitiveness
   A region has a *comparative advantage* when it can produce a product, good or service at a lower opportunity cost than other regions.
   Business competitiveness is the ability of a business to sell and supply goods and services compared to a competitor. A business has a comparative advantage when its products or services cannot be easily duplicated by competitors
5. Effective cross-sectoral and intergovernmental partnerships (including through place-based approaches) and integrated regional planning.

Queensland State Government Priorities

Following a change in government in 2012, the new Queensland Government has undertaken a raft of actions to achieve its commitment to balance the state budget. Significant cuts across a broad range of State Government programs, services and staffing levels have been undertaken.

The Government is currently drafting the new Queensland Plan which will outline the state's shared vision for the next 30 years and identify local and state-wide priorities.

It will seek collaborative input from Queenslanders and guide future activities delivered by all levels of government, business and the community and is being developed during 2013 through a collaborative process involving community members, business and industry representatives, state and local government officers and Members of Parliament.

The Queensland Government has implemented a reform of the state's planning development assessment framework which will deliver streamlined assessment and approval processes, remove unnecessary red tape and re-empower local governments to plan for their communities. These reforms are part of the amendments to the *Sustainable Planning Act 2009*.

The 2009-2031 South East Queensland Regional Plan is currently is draft and is expected to be released from 2014 onwards.

City of Gold Coast Priorities

An extensive list of reference material exists at the local level. A total of forty documents have been reviewed to gain an understanding of the issues identified by stakeholders at this level (refer to sources at section 8 for details), including:

- Council corporate and operational plans;
- Council planning scheme, policies and master plans;
- Council strategies and management plans; and
- Annual reports from industry and community groups.

Economic Development Strategy 2013-2023

The City of Gold Coast Economic Development Strategy 2023 provides the direction for the Gold Coast to become an international location of choice for businesses and residents. It aims to drive the creation of a world-class city, which is recognised globally for its unique lifestyle, talented people, its innovation and entrepreneurial culture. The Strategy recognises and embraces the critical challenges facing the City to drive the creation of jobs, grow emerging industries and build business and investor confidence. The Strategy also helps to prioritise economic opportunities to deliver the following outcomes:

- business and investor confidence
- improved productivity
- employment
- diversification
- increased education and skills attainment
- increased trade and export
- greater creativity and innovation

Corporate Plan 2009-14

To guide the delivery on the Council's and the community's shared vision for a truly sustainable city that delivers world-class services and amenities while preserving its precious natural environment and quality of life. Corporate planning ensures that the organisation has a clear direction which guides the allocation of resources over the long, medium and short-term.

Operational Plan 2012-13

To identify the detailed initiatives and activities, and their budget allocation and timeframes, which will be pursued by Council in order to achieve the 6 key focus areas as listed in the Corporate Plan. The Operational Plan supports the Corporate Plan in the delivery of the Bold Future Vision and provides the details of the planned activity and budget for 2009-10. The Operational Plan is delivered ahead of the annual budget and contributes to its development by being considered during budget discussions.

City Plan 2015

Council has a legislative requirement under the Sustainable Planning Act 2009 (SPA) to review its Planning Scheme (City Plan) every 10 years. The delivery of a new City Plan is a priority initiative that will reposition the City to take full advantage of critical city building outcomes such as the Commonwealth Games, key centres revitalisation opportunities and the introduction of transit corridors as a preferred model of sustainable city growth. It will do this through land use provisions that facilitate economic growth and development confidence in identified priority areas. Council has a January 2015 target go-live date.

Draft Local Growth Management Strategy and Planning Report

To provide detailed guidance on the preferred nature and timing of development within the Gold Coast Urban Footprint. To identify enhancements to the city's planning scheme and other key policy documents to ensure appropriate integration at the local level of the SEQ Regional Plan. This document is relevant to the entire Gold Coast region. It was prepared before the 2008 local government amalgamations so contains information relating to parts of the Gold Coast City which are now located in Logan City (e.g. the Beenleigh area).

Southport Priority Development Application (PDA)

The City of Gold Coast Economic Development Strategy (2013) emphasises the importance of a Central Business District (CBD) for the City. It prioritises the establishment of a CBD as one of the key economic infrastructure actions for the city's economic development and growth.

Southport is the traditional centre of the Gold Coast focused on knowledge based employment, regional government administration, medical, retail, commercial and regional community and recreation facilities. It is anchored by regionally significant facilities including a Magistrate's Court, community centre, library, public and private medical services, higher education campuses, regional public transport hub, light rail and the Southport Broadwater Parklands.

Southport has always been the pre-eminent centre of the city with the highest concentration of employment and with the largest share of office space (149,240m^2), attracting a workforce of 24,857 people. Southport is also the most populous centre in the city with a resident population of 28,315.

Currently, the International (China Town) Zone initiative, and the introduction of light rail, are leading an invigoration of Southport that will deliver opportunity and drive economic growth and thus employment opportunities in a plan to revitalise Southport.

With the recent approval by the State Government of a Priority Development Area (PDA) for Southport, and $5 billion being invested in projects in and surrounding the Southport area, including the Gold Coast University Hospital, Private Hospital, Commonwealth Games Athletes' Village, Southport Broadwater Parklands, Gold Coast Aquatic Centre, Gold Coast Institute of TAFE Education Village and light rail, Southport will experience accelerated economic activity in the next decade.

The PDA will engage directly with the City of Gold Coast's Economic Development Strategy and Transport Strategy and facilitate delivery of the City's CBD through the provision of opportunities that enhance Southport's economic and development growth. From its conceptual origins the PDA allows for and facilitates simple and natural (market led) commercial opportunities for individuals, entrepreneurs and businesses to cater for, and service, the needs of the resident and workforce population.

Draft Ocean Beaches Strategy

The strategy aims to ensure our beaches will be clean, healthy, safe and accessible now and into the future. The four strategic outcomes Council is seeking from the strategy are to ensure:

- everyone can enjoy a beach experience
- our beaches are healthy and clean
- our coastal infrastructure is protected from storm surge and erosion; and
- there is joint stewardship of our ocean beaches.

Gold Coast City Local Disaster Management Plan, 2012

The purpose of the Gold Coast City Local Disaster Management Plan is to detail the arrangements for the coordination and management of resources, to ensure and maintain safety in the Gold Coast community prior to, during and after a disaster. The plan ensures there is a consistent approach to disaster management for the region. The plan identifies potential hazards and risks in the Gold Coast area, identifies steps to mitigate these risks, and presents strategies to enact should a hazard impact and cause a disaster.

Transport Strategy, 2013

There is a need for the community to change its attitudes and behaviours toward public transport. For the region to become more sustainable, alternatives to car dependent travel need to be embraced. These alternatives already exists (e.g. the bus, heavy passenger rail and bicycle network) and there are plans to further enhance these services. The future light rail (Stage 1 between Southport and Broadbeach) will be completed in 2014. These alternatives require support by the local community if the region is to achieve sustainability goals adopted by the State and local governments.

Natural Area Management Plans (7 Reports - various dates)

To provide a framework that governs the development and delivery of all management programs and actions affecting particular natural areas on the Gold Coast. Natural areas are important environmental assets for the Gold Coast and provide opportunities for nature-based recreation. Council seeks to protect and manage these areas sustainability through natural area management plans.

Gold Coast Tourism Annual Report 2012

Tourism directly contributes $4.6 billion into the Gold Coast economy annually and accounts for 30,000 full time equivalent jobs in the city. Their strategies and activities are developed in consultation with the local industry, local council, state and national tourism bodies, national and international travel trade and other industry partners. Gold Coast Tourism delivers a united approach to destination marketing when it facilitates member participation on missions to overseas source markets. The objective of the collaborative approach is to showcase the Gold Coast as a destination and its individual assets to business and leisure tourism influencers in target markets. Participating members gain face to face contact with travel trade, retail and wholesale product managers, media and associated tourism industry personnel allowing ongoing marketing and sales activities in key cities in the elected countries.

Photo: City of Gold Coast

5. Analysis of the Region

A detailed regional analysis (*Gold Coast Regional Profile 2013*) is contained in section 8 of this report, but the following section highlights some of the analysis in the context of COAG's key determinants of long term economic growth. There is also further analysis using the Regional Development Institute's *Insight* online competitive index.

The table below shows how the Gold Coast region compares to two other comparable regions, the Sunshine Coast and the Hunter in terms of competitive ranking across a range of themes. The Sunshine Coast has been used as it is relatively close to the Gold Coast geographically and also shares a similar image in that it is a tourist and retirement destination and is a similar distance as the Gold Coast is from its capital city, Brisbane. The Hunter region was selected as it contains Newcastle, the Gold Coast's closest rival in terms of population size.

Some keys points about the Gold Coast are highlighted in the analysis:

- The Gold Coast ranks number 1 out of 55 RDA regions in terms of local government expenditure per capita.
- It ranks 52nd for the percentage of workforce employed in the public sector. The region obviously does not have a strong public sector presence, and the fact that 26,000 people commute daily to Brisbane suggests that a significant portion of those commuters would be employed in the public sector in Brisbane. Thus a case for increased government decentralisation and greater support of co-working centres by government agencies could be made.
- Access to aviation infrastructure scores highly due to the location of Gold Coast Airport within the city, similarly proximity of rail (passenger) infrastructure and a major highway provides a favourable ranking for the region.
- Whilst access to GP services ranks the region in 1st place, access to allied health services is a relatively low 39th. As the skills shortage study (refer to section ??) suggests, allied health services will be a potential source of employment is future years, but it seems that allied health is significantly under-represented in terms of employment currently.
- Wages are ranked 39th which is indicative of the region lacking well paid and permanent jobs
- Whilst the ranking for university qualifications (16th) is similar to the Sunshine Coast and Hunter RDA regions, it is probably lower than expected for a region with four universities. However, it does suggest that graduates leave the region in order to seek employment.
- The ranking for technical qualifications is very low (19th) when viewed alongside the comparative regions. Again, it could be indicative of skilled workers moving out of the region.
- The early school leavers' ranking (10th) shows a higher incidence than the comparative regions which have greater retention rate of school-aged students.
- Welfare dependence where the region ranks 55th obvious signals a concerning situation, but one which is probably exacerbated by a retired and transient population.
- Unemployment (51st) and youth employment (49th) are both strong indicator of the region's needs for greater employment opportunities and economic diversification.

- Economic diversification ranks at 20^{th} and dominance of large employers ranks at 41^{st} which confirms City of Gold Coast's Economic Development Strategy's major theme of investment attraction of large employers and further economic diversification.

Photo: Tourism and Events Queensland

Regional Competeveness by RDA Region (55 regions)

	Gold Coast		Sunshine Coast		Hunter	
	Value	National ranking	Value	National ranking	Value	National ranking
Institutions	**Theme ranking**	**2**	**Theme ranking**	**26**	**Theme ranking**	**27**
Public service	4.00%	52	4.10%	51	5.90%	29
Local government expenditure	$4,636	1	$1,269	27	$1,267	28
Regional government influence at state/national level	2.84	3	2.83	4	2.55	9
Transparency of local government policy	2.74	5	2.49	3	2.57	6
Clear roles and responsibilities in regional governance	3.12	5	3.18	3	3.08	6
Financial burden of local government	3.25	3	3.2	4	3.75	1
Local government assistance for businesses	2.59	8	2.65	6	2.57	8
Infrastructure & Essential Services	**Theme ranking**	**14**	**Theme ranking**	**22**	**Theme ranking**	**17**
Aviation infrastructure	10.5	2	15.7	8	48.6	21
Port infrastructure	68.5	22	91.7	27	62.6	21
Access to tertiary education services	6.40%	10	4.80%	16	5.70%	12
Access to technical or further education	2.90%	36	2.50%	50	3.60%	15
Access to hospital services	0.0139	25	0.0143	23	0.0149	19
Access to allied health services	10.30%	39	12.40%	13	12.40%	11
Access to GP services	6.6	1	4	46	5.3	19
Police services	0.002	39	0.0019	42	0.0018	46
Road infrastructure	1.8	7	2.1	9	8.6	40
Access to primary education services	1.6	12	2.2	15	3	16
Access to secondary education services	3.1	10	3.5	12	15.5	29
Rail infrastructure	6	3	10.7	19	12.6	23
Economic Fundamentals	**Theme ranking**	**7**	**Theme ranking**	**6**	**Theme ranking**	**46**
Building approvals	$1.03	6	$1.05	5	$0.08	37
Wage/labour costs	$40,819	33	$38,531	42	$45,743	18
Business confidence	3.28	8	3.28	7	3.22	8
Human Capital	**Theme ranking**	**23**	**Theme ranking**	**27**	**Theme ranking**	**16**
University qualification	17.40%	16	18.40%	14	16.40%	19
Technical qualification	35.90%	19	40.40%	3	38.50%	6
Lifelong learning	44.70%	31	43.50%	48	45.40%	25
Early school leavers	44.80%	10	50.20%	12	60.10%	37
Health	61.30%	31	66.20%	51	59.60%	29
English proficiency	92.50%	42	95.60%	6	95.40%	10
Early childhood performance	29.80%	43	27.30%	37	21.90%	15
School performance - Primary	35.10%	14	31.80%	25	35.90%	12
School performance - Secondary	24.60%	10	22.50%	19	23.30%	14

	Gold Coast		Sunshine Coast		Hunter	
	Value	National ranking	Value	National ranking	Value	National ranking
Technological Readiness	**Theme ranking**	**9**	**Theme ranking**	**15**	**Theme ranking**	**20**
Internet connection	67.80%	10	67.00%	12	62.80%	18
Broadband connections	72.90%	7	68.00%	15	66.20%	24
Businesses in technology and related industries	7.40%	10	6.70%	13	6.00%	17
Workers in ICT and electronics	1.50%	17	1.10%	24	1.10%	23
Labour Market Efficiency	**Theme ranking**	**49**	**Theme ranking**	**34**	**Theme ranking**	**35**
Unemployment rate	7.40%	51	7.10%	48	5.50%	33
Young unemployment	15.00%	49	14.60%	47	11.80%	28
Participation rate	75.50%	19	75.30%	23	73.20%	36
Skilled labour	27.50%	35	28.10%	32	27.20%	37
Welfare dependence	25.70%	55	14.60%	6	20.40%	35
Business Sophistication	**Theme ranking**	**9**	**Theme ranking**	**8**	**Theme ranking**	**40**
Economic diversification	0.16	20	0.05	6	0.15	18
Dominance of large employers	4.20%	41	3.20%	14	4.80%	46
Exporters, importers, wholesalers	0.29%	4	0.28%	5	0.12%	29
Income Source - Own business	18,236	18	15,941	29	18,136	19
Access to local finance	0.94%	15	0.95%	14	1.16%	6
Exports	3.7	5	3.19	7	0.56	10
Innovation	**Theme ranking**	**31**	**Theme ranking**	**35**	**Theme ranking**	**30**
Human resources in science and technology	3.10%	20	3.00%	25	3.30%	17
Research and development managers	0.04%	12	0.04%	21	0.05%	10
Presence of research organisations	0.01%	24	0.00%	29	0.01%	18
Expenditure on research and development	3.13	6	3.2	5	3.03	8
Market Size	**Theme ranking**	**9**	**Theme ranking**	**15**	**Theme ranking**	**10**
Size of economy $m	20,914	9	11,685	13	16,391	10
Population (working age)	331,407	10	193,001	16	396,962	9
Natural Resources	**Theme ranking**	**30**	**Theme ranking**	**28**	**Theme ranking**	**22**
Mineral resources	0.70%	39	1.30%	29	4.60%	14
Timber resources	0.10%	37	0.10%	35	0.20%	27
Commercial fishing and aquaculture	0.04%	30	0.07%	23	0.09%	18
Coastal access	5.3	3	24.1	17	48.5	29
National Park	15.9	14	15.9	14	19.1	29
Net primary productivity	5.2	23	7.5	17	3.3	35

Source: Regional Australia Institute, Insight, http://insight.regionalaustralia.org.au

Key determinants of long-term regional economic growth

The Council of Australian Governments (COAG) Regional Australia Standing Council (RASC) has established national approaches to regional development in order to facilitate collaboration and coordination between different levels of government. RASC has agreed to four key determinants of long term regional economic growth:

1. **Human Capital, particularly education and skills**

   Human capital is the stock of knowledge, expertise and abilities of a region

2. **Sustainable Communities (economic, environmental and social) and population growth**

   Sustainable communities refers to the ability of a region to endure in the long term. It has economic, environmental and social dimensions.

   Population growth refers to change in the size of a population over time, caused by migration and natural change through births and deaths

3. **Access to international, national and regional markets**

   This refers to the ability to trade goods and services in a given market

4. **Comparative advantage and business competitiveness**

   A region has a *comparative advantage* when it can produce a product, good or service at a lower opportunity cost than other regions.

   Business competitiveness is the ability of a business to sell and supply goods and services compared to a competitor. A business has a comparative advantage when its products or services cannot be easily duplicated by competitors.

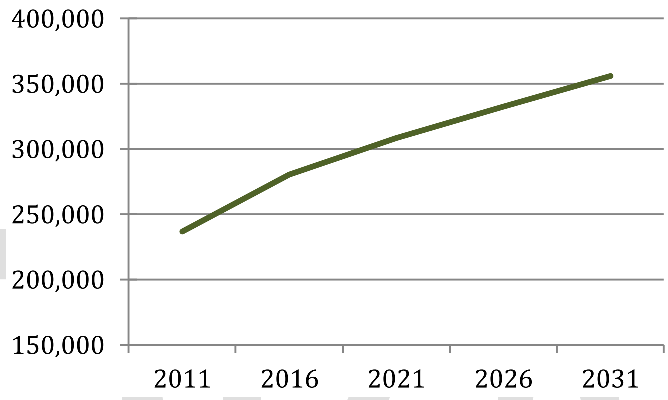
Photo: Tourism and Events Queensland

Analysis of the Gold Coast region using the key determinants of long-term regional economic growth

Human Capital

Employment outlook for the region - SGS Economics & Planning recently completed a study for RDA Gold Coast and the forecast workforce change is shown in the chart below.

REGIONAL EMPLOYMENT PROJECTIONS, 2011 TO 2031



Source : SGS Economics & Planning, July 2013.

The workforce on the Gold Coast is forecast to expand by 50.6% from 236,395 in 2011 to 355,895 by 2031. Over the same period the population of the Gold Coast is projected to increase by 46.7%, compared to 43% projected increase for Queensland[1]. As a share of total Queensland employment, the Gold Coast region has recorded a gradual rise over the past decade from 10.6% in 2001 to 11.4% in 2011.

Given that population and employment growth on the Gold Coast has outpaced the State average in the past, and population growth is expected to continue to be higher on the Gold Coast than for Queensland, growth in labour demand in the Gold Coast region is expected to generally outpace growth in Queensland over the forecast period.

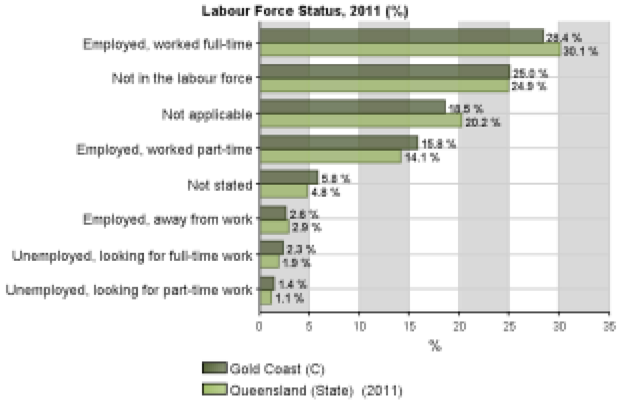
At the industry level by 2031, the 'Health Care and Social Assistance'; Retail Trade' and 'Accommodation and Food Services' industry sectors are projected to account for the largest employing industries on the Gold Coast.

Between 2011 and 2031 the largest growth sectors include 'Health Care and Social Assistance', 'Mining', 'Financial and Insurance Services' and 'Finance and Insurance Services'. The 'Agriculture, Forestry and Fishing' and 'Manufacturing' industry sectors are likely to see reductions in the number of jobs on the Gold Coast.

[1] *Queensland Government population projections, 2011 edition (medium series), Office of Economic and Statistical Research, Queensland Treasury and Trade.*

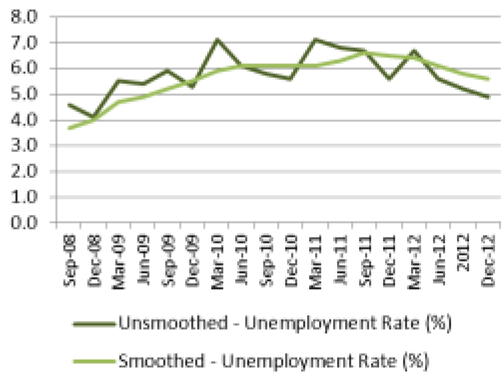
Employment

GOLD COAST LABOUR FORCE STATUS, 2011



In comparison to the Queensland average, the Gold Coast labour force has a relatively high proportion of people that are employed on a part-time basis, this is reflective of the large number of people employed in the 'Retail Trade' and 'Accommodation & Food Services' industry sectors.

REGIONAL EMPLOYMENT AND UNEMPLOYMENT



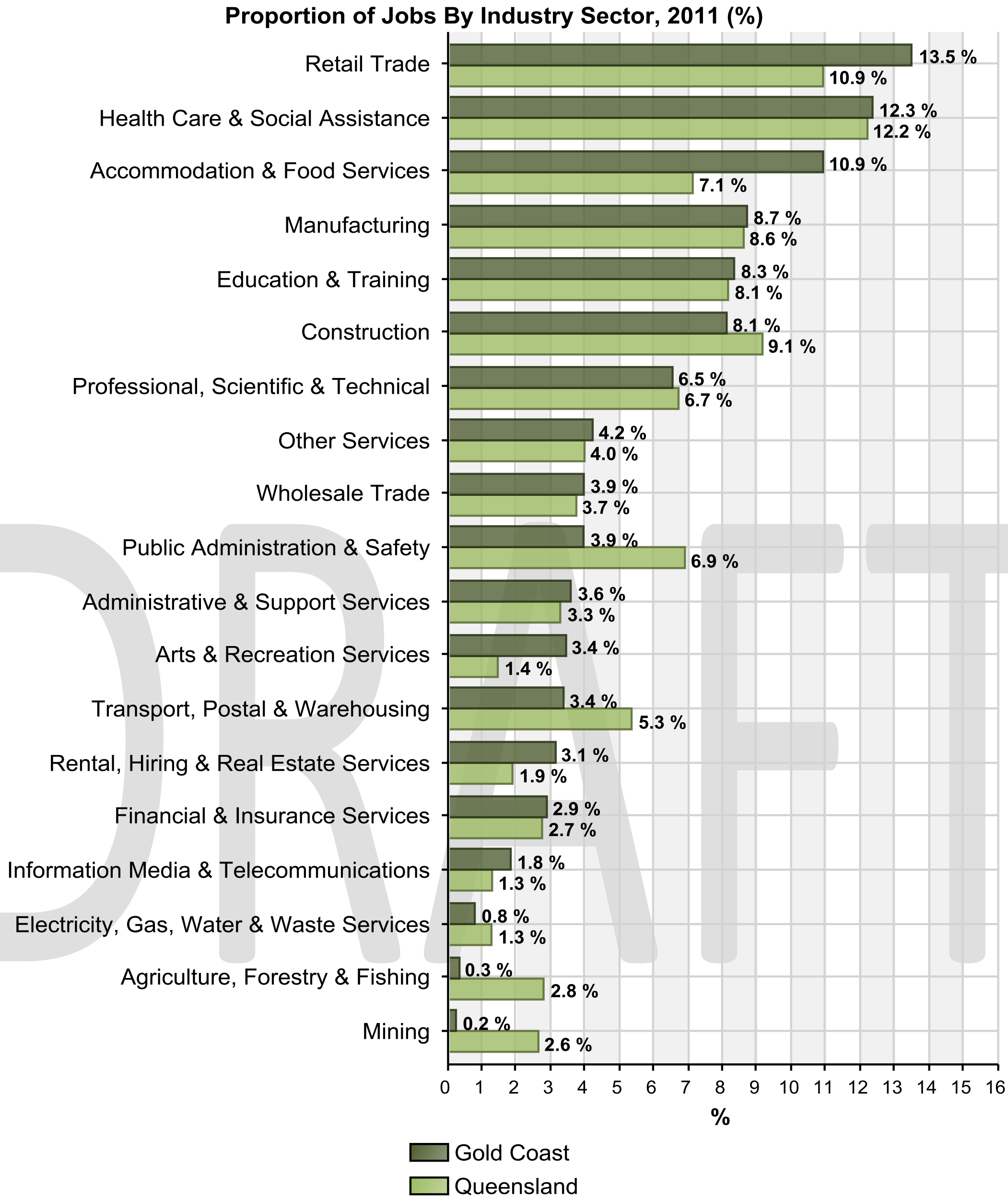
Source: DEEWR, Small Area Labour Markets Australia

Employment by Industry

Based on the 2011 Census, there were 182,274 jobs located within the Gold Coast Region. The 'Retail Trade' sector accounted for the highest proportion of jobs (13.5%), followed by 'Health Care & Social Assistance' (12.3%) and 'Accommodation & Food Services' (10.9%). The following chart provides a comparison with the Queensland employment profile by industry sector.

In comparison to the State averages, the Gold Coast has a higher representation for 'Retail Trade' and 'Accommodation & Food Services' which is reflective of population growth and tourism being major drivers of the Gold Coast region. The proportion of the workforce in 'Public Administration & Safety' and 'Transport & Warehousing' is considerably higher across the State than the Gold Coast, and may provide potential opportunities given the Gold Coast's strategic location to transport infrastructure and the States capital, Brisbane.

GOLD COAST AND QUEENSLAND EMPLOYMENT BY INDUSTRY



Youth Unemployment

Employment statistics for those who work and live in the region from 2011 ABS Census data indicates that the majority of 15-24 year olds working and living in the region were employed in the 'Retail Trade' industry sector (26.2%), followed by 'Accommodation & Food Services' (25.3%) and 'Health Care & Social Assistance' (6.9%). In total, these industries employed 15,393 (58.5%) of 15-24 year olds who work and live in the region. This largely reflects the region's economic base and employment opportunities. Alternative employment options need to be developed for young people outside these population servicing core industries.

YOUTH EMPLOYMENT

	Live and Work in Gold Coast (C)		Work in QLD
Industry Sector	**Jobs**	**%**	**%**
Retail Trade	6,910	26.20%	22.00%
Accommodation & Food Services	6,658	25.30%	18.40%
Health Care & Social Assistance	1,826	6.90%	7.60%
Total	15,394	58.50%	48.10%

Source: REMPLAN Economy Workforce

According to the ABS labour data, young people in Queensland continue to experience significantly higher rates of unemployment:

- In Queensland (at February 2013), the unemployment rate among 15–19 year-olds not in full-time education was 21.1%. The participation rate is 78.7% for the same cohort.
- In Queensland (at February 2013), the unemployment rate among 20–24 year-olds not in full-time education was 10.8%. The participation rate is 85.8% for this cohort.

Youth unemployment is a significant issue concerning young people in the region, with high levels of unemployment and low levels of long term employment opportunities, this is an area that requires focus to ensure that today's youth are trained and skilled to be welcomed into tomorrow's workforce.

Education and Qualifications

The Australian Bureau of Statistics 2011 and Gold Coast Community Profile, show the following levels of qualifications in the region:

- Among the Gold Coast population, fewer people have a degree or higher (17.8%) versus Queensland (19.8%) but the gap is has been decreasing over time. From 13.8% in Gold Coast in 2006 and 16.6% of Queensland in 2006.
- Among 15-24 year olds 22.4% are attending 'University or other Tertiary Institution' compared with a Queensland average of 16.2%. This is a substantial increase from 2006 when only 13.6% of Gold Coast residents in this age group were attending university.

The following graph shows the qualification levels for Gold Coast residents for 2006 and 2011. There has been a steady growth in the levels of qualifications that have been attained.

GOLD COAST QUALIFICATIONS 2006 TO 2011

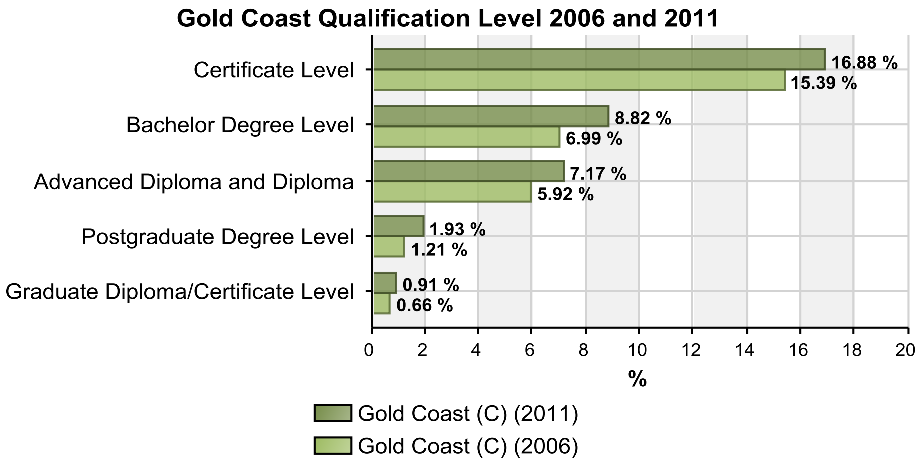


Photo: Griffith University

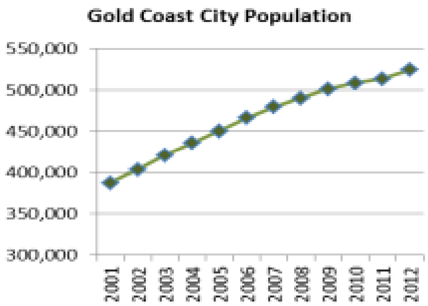
Sustainable Communities (Economic, Environmental and Social) and Population Growth

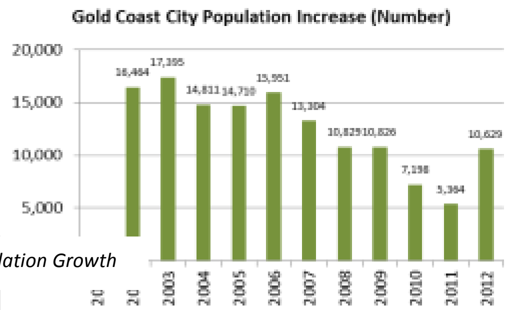
Between 2001 and 2012, the Gold Coast's population has grown 35.5% or by over 137,000 people.

In the period from 2001 to 2012, the Gold Coast's share of Queensland population growth averaged 14.8%, peaking in 2002 at 19.2% of Queensland's growth, and reaching its lowest share in 2011 with 10.7%.

The reasons for the slowdown include the overall weaker economy, the soft tourism market which is a critical industry to the Gold Coast, and infrastructure bottlenecks.

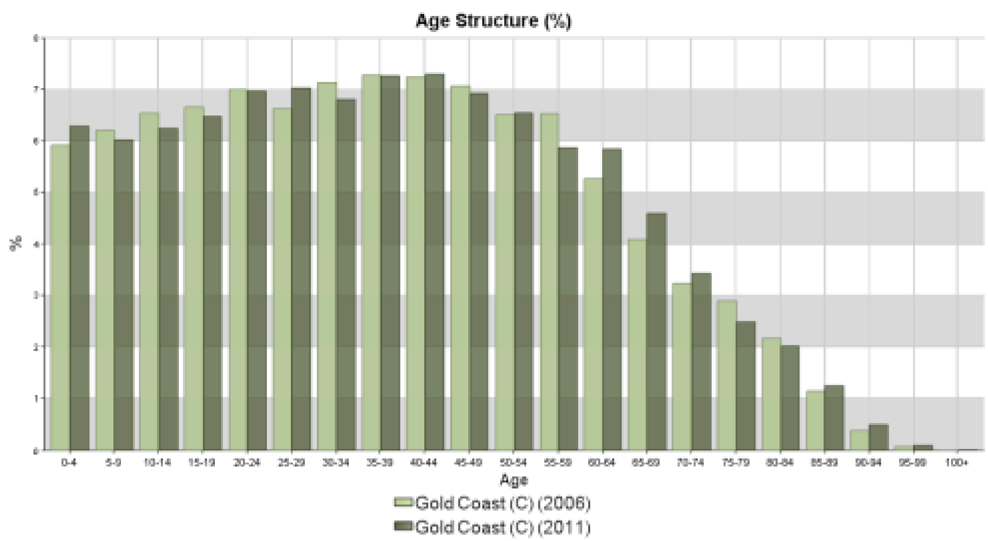
It is still the case, however, that the Gold Coast has been one of the fastest growing regions in Australia:





) Regional Population Growth

Between 2006 and 2011 there was significant growth in the 60-74 age cohorts:

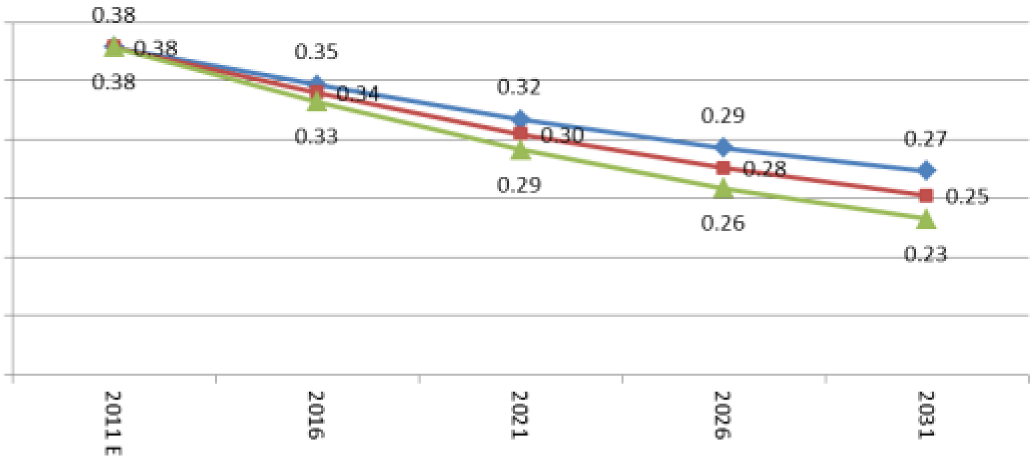


Environment

The Gold Coast is well known for its natural environmental assets including beaches, waterways open spaces, national parks which contribute to the region's lifestyle. The region's beaches are a major tourist attraction with an estimated 5.5 million beachgoers annually.

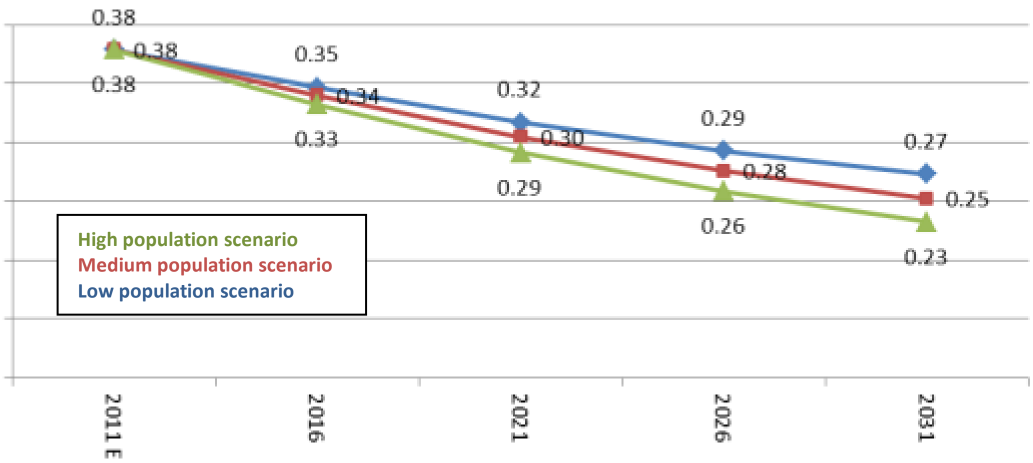
During early 2013, most of the region's beaches where affected by storm damage, and have yet to be fully restored to their original condition. The expected cost of remediation will be significant, with local government investigating funding options.

The projected strong population increases will place considerable pressure on these natural areas.



This chart 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 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.

Average Recreation (Hectares) Area per Person



Urban Development

Population scenarios have been based on the Queensland Government[2] projections. The average household size on the Gold Coast was 2.5 persons in 2011[3], this average has been held constant across the projected period.

Based on the average household size of 2.5 persons per household, under the medium population projection scenario there is projected to be demand for a total of 301,636 dwellings by 2031. This equates to an additional 96,055 dwellings (46.7% increase) from the 205,582 dwelling required to meet the 2011 estimate resident population of 513,954. Under the high population scenario, an additional 121,701 dwellings would be required in the region, a 59.2% increase from 2011.

The Gold Coast region has a population density of approximately 380 people per square kilometre (2012 population of 524,583 and total Council Area of 1,379 square kilometres), which is far greater than total Greater Brisbane (135.6 people per square kilometre). This higher average is a reflection of the high density high rise apartments and residential towers concentrated along the coastline from Burleigh Heads to Runaway Bay.

According to the Socio-Economic Indexes for Areas (SEIFA - developed by the ABS from the 2011 Census), the Gold Coast is ranked ninth out of approximately 80 LGA's in Queensland with a score of 1,014.2. Mining LGA's such as: Weipa, Isaac, Central Highlands, Mackay and Gladstone in addition to Brisbane (1,047.7) have a higher index. The Sunshine Coast is ranked 12th with an index of 1,007.3.

Photo: GoldLinQ

[2] *Queensland Government population projections, 2011 edition (medium series), Office of Economic and Statistical Research, Queensland Treasury and Trade.*
[3] *Based on the 2011 Census, there were 195,580 total households enumerated and 494,496 people (place of usual residence) on the Gold Coast, equating to an average of 2.5 persons per household.*

Access to international, national and regional markets

The Gold Coast is well situated to access international, national and regional markets with its proximity to transport infrastructure such as major roads and airports.

It is well placed to take advantage of Asian Century opportunities with its residents' strong connection to Asia and also with strong transport linkages to Asia.

The City of Gold Coast with its investment attraction programs has established strong links to overseas markets by way of trade missions and export initiatives.

The Gold 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, domestically and internationally, to education services and community benefits such as better health and aged care services.

The Gold 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 Gold Coast level, the recent 2009-10 ABS report on internet commerce shows that nationally 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). 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.

Transport and Access Issues

Transport demand has been growing strongly, as can be expected in a region that has also grown strongly in terms of GRP growth and population increase. There are signs that infrastructure is having difficulty coping with this demand and this is impacting negatively on accessing other markets.

- Currently, private motor vehicles are used for the majority of trips on the Gold Coast (for example, approximately 80% of Gold Coast residents' main method to work was made by private vehicle (ABS, 2011) and this car use is growing faster than total employment on the Gold Coast (14.7% versus 11.0%). 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 Pacific Highway is a deterrent.
- Seasonal car parking congestion, especially around Surfers Paradise, is well documented.

- The Gold Coast Airport is also reporting the need to expand to meet demand (Gold 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 Gold Coast's unique lifestyle qualities.
- Loss of the lifestyle attraction and key competitive edge of the Gold 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 Light Rail due to commence in 2014).
- Sustainable transport energy sources (eg electric, hydrogen, hybrid, biodiesel and fuel cells).
- Upgrade of the Pacific Motorway.
- Expansion of the Gold 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.

Comparative Advantage and Business Competitiveness

The Gold 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. This will place even more pressure to further substantially develop infrastructure across all areas, for example health, education, transport and water. To further develop the regional economy a number of critical issues have been identified including:-

- Promoting economic development where it complements the Gold Coast's lifestyle and environmental assets.
- Embracing collaborative governance and stakeholder engagement across the region.

- Committing to regional strategies and adopting local initiatives where community attributes warrant.
- Diversifying the industry and employment base to one that is more knowledge intensive and export orientated and less reliant on population driven industries.
- Facilitating development of hard infrastructure networks as well as soft infrastructure.
- Engaging institutional and private sector leaders in shaping and implementing economic development initiatives with a preference for cluster based activities.
- Directing efforts towards tourism, health, education, cultural and creative industries and sustainable rural industries.
- Building on an emerging capability in music, writing, marketing, architecture and design, visual and performing art. There will be a particular emphasis on building new media, film and TV, broadcasting, computer animation and video games, web design and music composition and production.

The Gold Coast is well located as a business destination between Brisbane and the New South Wales border. Its attractions for business include:

- Access to major road networks, north, south and west
- Proximity to both Gold Coast and Brisbane airports
- A growing population
- In excess of 60,000 businesses
- Access to four universities and a major TAFE
- Quality lifestyle and favourable climate
- A local council which has a policy of being “open for business” and which has an established program of business support, including supporting local business for procurement contacts
- A local council planning scheme in progress which will assist businesses in the city
- Workforce capacity
- Workforce expertise in the construction, tourism and retail industries
- An existing workforce which shows a propensity to travel long distance to work, such as in the mining and resources sector
- A culture of entrepreneurship

Following the global economic downturn of recent years, businesses in the region appear to be optimistic about the future, based on the findings of a business survey undertaken by AEC Group in 2013 to inform the development of the Gold Coast Economic Development Strategy (*source: City of Gold Coast: Economic Development Strategy 2013, background report – SGS Economics & Planning*). There are however factors which could reduce comparative advantage including

- housing costs
- relative scarce availability of affordable housing
- Banks’ current reluctance to advance funds on Gold Coast investment projects
- Low rates of high-speed broadband availability
- No daylight saving time can hinder cross-border business

Regional Strengths, Challenges, Needs and Opportunities

Our review of the strengths of the region, coupled with the challenges it faces in the short, medium and long-term highlights some significant opportunities for the future.

Strengths

Economic

- Well-developed tourism industry and infrastructure
- Internationally recognised holiday destination
- Well-developed construction industry
- A growing small and micro business sector
- Large retail sector
- Favourable geographical location within SEQ and next to the Northern Rivers region of NSW

Social

- Good access to medical and GP services
- Relaxed lifestyle
- Diverse living options – waterfront, beachfront, urban, suburban, hinterland, rural
- Educational offerings e.g. range of schools, TAFE, 4 universities

Lifestyle/Environment

- Favourable year-round climate
- High quality natural environment close to the city
- International airport
- Road and rail connections to Brisbane
- Strong association of the Gold Coast with fun and relaxation

Challenges

Economic

- Ageing tourist attractions and infrastructure
- Perception as holiday destination not business centre
- Global competition for tourists in period of strength of Australian Dollar
- Low job security
- Comparatively low levels of participation in higher education
- Narrow industry base with heavy reliance on tourism/retail/construction
- High unemployment and underemployment
- Shortages of highly skilled labour
- Perceived over-regulated city planning system
- Proportion of workforce employed outside the region

Social

- Congested access to Brisbane by road and rail.
- Limited public transport linking rural areas to major centres of activity
- High car dependency
- Funding for infrastructure construction
- Specific areas of social disadvantage
- Low levels of community care and support

- Preferred choice for ageing population
- Perception of increasing criminal activity

Lifestyle/Environment

- High housing costs and limited affordable housing
- Demand for acreage / low density housing increasing the need to travel further to services and facilities
- Limited available land for housing and industry space without compromising natural environment
- Flood plain management
- Beaches, being a key tourism attraction which are susceptible to adverse weather conditions
- Limited employment opportunities forces many residents to commute up to 3 hours daily to Brisbane

Needs

Economic

- Upgraded infrastructure – roads, public transport and affordable housing
- Perception shift as a serious place to do business
- Refreshed tourist offerings
- Economic diversification
- Investment attraction for business relocation
- Relocation of governmental departments from other areas (Brisbane) to the region
- Increased participation in higher education
- Creation of jobs and industries for graduates to remain in the region
- Streamlining of city planning system
- Increase the number of workforce participants in the region

Social

- Usage of co-working centres as an alternative to commuting.
- Improved public transport linking growth areas to major centres of activity
- Reduce car dependency
- Funding for infrastructure construction
- Reduce social disadvantage in areas of recent growth
- Improve low levels of community care and support
- Preferred choice for ageing population
- Reduce criminal activity and improve feeling of community safety

Lifestyle/Environment

- Improved access to and availability of affordable housing
- Revised thinking of housing types suitable for a growing city – reduce impact on environment of new housing developments
- Flood plain management
- Reallocation of funding/increase funding to maintain and restore beaches following adverse weather conditions and natural disasters

Opportunities

Economic

- Renew tourist accommodation
- Diversify the tourism product/market
- Increase training and education for health and education sector
- Encourage new businesses to establish in the region
- Capitalise on new information technology opportunities
- Strengthen existing small business sector
- Develop the airport as a trade hub
- FIFO resources sector potential
- Connectivity to global and national markets
- Building on the strengths of the local marine Industry
- Link the airport with the central activity centres
- Commonwealth Games
- Light rail expected to stimulate localised development and urban renewal along the route

Social

- Plan for the future of the region in cooperation with neighbouring regions
- Improve public transport
- Build strong, inclusive communities
- Develop internet based health services
- Provide additional aged care and community health services
- Co-working centres to reduce social impact of commuting

Lifestyle/Environment

- Increase the density of the high rise spine to reduce travel and increase sustainability
- Infill and Brownfield development opportunities
- More affordable homes
- Plan for future of the cane fields land

Photo: Absolom Photography www.absolomphotography.com.au

6. Regional Priorities

This Regional Plan has revised the previously identified three priorities for the region of:

- Promote and enhance job creation
- Strengthen the community and foster civic pride
- Enhance the lifestyle and environment

Additionally as part of a stakeholder and community engagement process in late 2012, and subsequent continual community consultation, the following key subjects were identified as having significant interest for the region:

- Education
- Positive image and branding
- Communications and technology
- Long term planning, natural assets and planning issues
- Arts, culture, sport and events
- Public transport
- Employment and diversification of the economic base
- Social inclusion
- Housing
- Tourism

The importance of COAG's determinants of long-term regional economic growth, as identified in section 5 of this Regional Plan have been taken into account by the committee when reviewing RDA Gold Coast's priorities and consequently its revised priorities reflect these key determinants.

Workforce

Sustainable Communities

Investment and Infrastructure

Economic Diversity

Digital Economy

Each of these priorities are expanded upon in the following sections, and how they relate to the region's strengths, challenges and needs; how they will support the committee's vision for the region and how they align to local government priorities.

How the region's priorities relates to its strengths, challenges, needs and opportunities

Regional Priority	***Strength***	***Challenge***	***Need***	***Opportunity***
Workforce • Education and training • Workforce skills development • FIFO • Co-working	Strong presence of educational offerings in the region Workforce prepared to travel long distances in a FIFO environment	Low levels of higher education participation High employment and under-unemployment Shortages of highly skilled labour High proportion of workforce employed outside of the city	Increased participation in higher education Retain workforce skills in the region by providing employment prosects	Increased acceptance and usage of co-working centre, especially by govt. depts. Increase training for healthcare and allied healthcare employment opportunities
Sustainable Communities • Public transport • Accessible healthcare • Disability • Positive image and branding • Environmental • Social inclusion • Affordable housing	Attractive lifestyle and climate Good access to healthcare	Isolated suburbs in a public transport shadow Perception of increased crime	Affordable housing Improve community cohesion Reduce social isolation Improve public transport Reduce car dependency Reduce effects of natural disasters on beach erosion Floodplain management	Light rail to improve community connectedness and reduce car dependency Commonwealth Games opportunity to improve image of the region
Investment and Infrastructure • Town Planning • Investment attraction • Reduced regulatory burden • Light rail • Commonwealth Games legacy • Arts, sports and cultural events	Well established tourism infrastructure and industry Good transport infrastructure access	Ageing tourism infrastructure and attractions Perception as not a serious place to do business	Additional investment to renew aging assets Perception change to a serious place in which to do business Streamline city's planning system Additional investment attraction initiatives	Planning scheme to reduce red tape. Southport PDA Asian Century
Economic Diversity • Creative Industries • Education • Healthcare • Bio-technology • Entrepreneurship/ innovation • Competitiveness	A growing entrepreneurial and SME sector	Low job security and employment opportunities Narrow industry base with heavy reliance on tourism, retail and construction Lack of opportunities forces many resident to work outside of the city	Economic diversification is a key need Decentralisation of Govt Depts to create city job opportunities	Emerging innovation, creative and co-working hubs Forecast demand in future years for healthcare, allied healthcare workers

Digital Economy • NBN • Co-working • Intelligent city status • Wifi hotspots • Telecoms infrastructure	NBN rollout has begun in 2013 Co-working movement well established in the region City of Gold Coast Digital economy strategy in progress Established education network Established IT industry associations	Broadband black spots and slow rollout of NBN Slow adoption of digital economy by business Limited knowledge of digital technology benefits Absence of direct international connectivity Absence of local data storage and data processing capacity Shortage of IT career opportunities	Faster and wider rollout of NBN to more communities Improved business and community education of digital economy Investment in international connectivity and local data storage and data processing capacity Economic diversity initiatives to include digital economy	NBN rollout will be an enabler for a digital economy Community WIFI would enhance the visitor experience Creation of new online and digital technology businesses, e.g. creative, medical, robotics, sensors, IT etc Transformation of existing businesses to adopt digital technology Development of tertiary-based centres of expertise in digital technology

How each priority will support the Committee's vision for the Region?

Regional Priority	***How the committee's vision will be supported***
Workforce	The creation of a more educated workforce, which is able to take advantage of future employment opportunities
Sustainable Communities	Communities which are better connected by both physical and social infrastructure
Investment and Infrastructure	The creation of a business environment which is attractive to existing and prospective businesses and investors
Economic Diversity	Broaden the region's economic base, and reduce over reliance of traditional industries such as tourism and construction
Digital Economy	Embrace opportunities in the area of technology will create opportunities for a growing population to become more technically endowed and will create a better environment for emerging industries to develop

How the regional priorities connect with local government priorities

The regional priorities as identified by the RDA Gold Coast committee were developed independently of City of Gold Coast's priorities, but are closely aligned with Council's key strategies, initiatives and priorities, and are in fact highly complementary to them:

Regional Priority	***Connection with City of Gold Coast Strategy/ Initiative***
Workforce	Economic Development Strategy FIFO Coordinator project Jobs Drive initiative
Sustainable Communities	GCCC Transport strategy Northern Growth corridor GCCC Branding Strategy Community Strategy
Investment and Infrastructure	Economic Development Strategy Investment Attraction Transport Strategy Commonwealth Games Legacy Policy
Economic Diversity	In its Economic Development Strategy the City of Gold Coast has identified the following industries as its key investment focus: ✓ Creative (film, music, fashion) ✓ Education ✓ Environment ✓ Food ✓ Health and medical ✓ ICT ✓ Marine ✓ Sport ✓ Tourism
Digital Economy	Economic Development Strategy - Digital Strategic Plan

7. RDA's projects, activities and initiatives

Through collaborative leadership, advocacy and partnerships, RDA Gold Coast will contribute to regional priorities and support the regional vision by:

- Research – evidence based which supports the work of RDA Gold Coast
- Communication – stakeholders will be informers, and in return, inform RDA Gold Coast
- Engagement – with stakeholders, communities and governments
- Facilitation – with stakeholders and governments to achieve regional priorities
- Leadership – by being thought leaders and with a non-political agenda

A detailed business plan will be developed to support activities and initiatives which will progress and achieve each of the five regional priorities

Priority	***Summary of How Priority Will Be Progressed and Achieved***
Workforce	▪ Review finding of skills shortage study and disseminate this information to the business and education community ▪ Support existing stakeholders undertake gap analysis to determine skills required by local industries ▪ Promote community, institutional and business connections and collaborations in planning future education and training provision ▪ Support existing networks to develop business opportunities from university research ▪ Collaboration with City of Gold Coast on FIFO project and initiatives
Sustainable Communities	▪ Develop the affordable housing project commenced in 2012/13. ▪ Develop the disability smartphone app beyond prototype phase ▪ Promote and support social enterprise initiative with third party community fund ▪ Develop partnerships between community, business and institutions to strengthen community bonds and build a strong sense of belonging and acceptance ▪ Develop digital literacy to reduce the digital divide.
Investment and Infrastructure	▪ Encourage planning for future stages of the light rail infrastructure, connecting with the airport and the heavy rail system

	▪ Promote the development of targeted industry training for mining and health care sectors ▪ Advocate investigation of alternative ways of paying for key local infrastructure ▪ Engage governments to advocate for a framework and culture that supports business.
Economic Diversity	▪ Encourage attraction new and emerging industries, and diversification of the tourism and construction sectors ▪ Facilitate delivery of small business support services ▪ Influence building on the strengths of the marine industry ▪ Support innovation and entrepreneurial initiatives
Digital Economy	▪ Digital economy seminars/public education ▪ Information dissemination about trends, initiatives, news etc. ▪ Digital economy advocacy ▪ Collaborate with and support City of Gold Coast Digital economy initiatives and projects ▪ Support development digital applications such as smartphone apps with community benefit etc. ▪ Promote and support development and adoption of co-working

Photo: Absolom Photography www.absolomphotography.com.au

8. Sources

NATIONAL

Australian Government

Department of Broadband, Communications and the Digital Economy
(2012) NBN Co Corporate Plan 2012-15
http://www.dbcde.gov.au/broadband/national_broadband_network
(2013) Advancing Australia as a Digital Economy: An update to the national Digital Economy Strategy
http://www.nbn.gov.au/nbn-benefits/national-digital-economy-strategy/

Department of Climate Change and Energy Efficiency
(2011) Securing a Clean Energy Future – The Australian Government's Climate Change Plan
http://www.cleanenergyfuture.gov.au/clean-energy-future/securing-a-clean-energy-future/
http://www.cleanenergyfuture.gov.au/clean-energy-future/our-plan/

Department of Education, Employment and Workplace Relations
(2013) Small Area Labour Markets, December Quarter 2012
http://deewr.gov.au/small-area-labour-markets-publication
(2013) Australian Jobs 2013
http://deewr.gov.au/resources/australian%2520jobs%25202013
(2012) Regional Education, Skills and Jobs Plan – Qld – Gold Coast 2012 – 2014
http://foi.deewr.gov.au/node/7388

Department of Families, Housing, Community Services and Indigenous Affairs
(2013) Proposed National Framework for Reducing Practices in the Disability Service Sector.
http://www.fahcsia.gov.au/our-responsibilities/disability-and-carers/publications-articles/policy-research/draft-proposed-national-framework-for-reducing-the-use-of-restrictive-practices-in-the-disability-service-sector
(2009) Shut out: The experience of people with disabilities and their families in Australia.
http://www.fahcsia.gov.au/our-responsibilities/disability-and-carers/publications-articles/policy-research/shut-out-the-experience-of-people-with-disabilities-and-their-families-in-australia

Department of Health and Ageing
(2012) 2012 National Aged Care Workforce Census and Survey – The Aged Care Workforce – Final Report
http://www.health.gov.au/internet/main/publishing.nsf/Content/ageing-nat-agedcare-workforce-census-survey

Department of Infrastructure and Transport
Bureau of Infrastructure, Transport and Regional Economics
(2013) Cities, Population growth, jobs growth and commuting flows in South East Queensland Research Report 134
http://www.bitre.gov.au/
(2011) Our Cities, Our Future – A National Urban Policy for a productive, sustainable and liveable future
http://www.infrastructure.gov.au/infrastructure/mcu/urbanpolicy/index.aspx
(2012) State of Australian Cities 2012
http://www.infrastructure.gov.au/infrastructure/mcu/soac/index.aspx

Department of Regional Australia. Local Government, Arts and Sport
(2013) Regional Economic Development Guide
http://www.regional.gov.au/regional/publications/regional-economic-development-guide/index.aspx
(2013) Framework for Regional Economic Development.
http://www.regional.gov.au/regional/publications/framework-for-regional-economic-development/pdfs/framework-for-regional-economic-development-20130614.pdf
(2013) Regional Development Australia Fund
http://www.regional.gov.au/regional/programs/rdaf.aspx

Department of Sustainability, Environment, Water, Population and Communities
(2013) Sustainable Australia Report 2013 – Conversations With The Future.
http://www.environment.gov.au/about/publications/index.html
(2011) State of the Environment 2011 (SoE 2011)
http://www.environment.gov.au/soe/2011/report/index.html

Treasury
(2013) Budget – Regional Australia: Strengthening Communities
http://www.regional.gov.au/department/statements/2013-14/portfolio-budget-statements/index.aspx
(2010) Australia to 2050: Future Challenges
http://agencysearch.australia.gov.au/search/search.cgi?collection=agencies&profile=treasury&query=australia%20to%202050&scope_disable=off

Other

Australian Bureau of Statistics
Labour Force, Australia, May 2013
http://www.abs.gov.au/ausstats/abs@.nsf/mf/6202.0
2011 Census Community Profiles
http://www.censusdata.abs.gov.au/census_services/getproduct/census/2011/communityprofile/0

Australian Local Government Association
(2013) State of the Regions 2012-13
http://alga.asn.au/?ID=10353&Menu=44,68,179

Australian Social Inclusion Board
Social Inclusion in Australia: How Australia is faring, 2012
http://www.socialinclusion.gov.au/resources

National Disability Insurance Scheme
(2013) Disability Care Australia – Supporting Australians with disability through the national disability insurance scheme.
http://www.ndis.gov.au/resources/fact-sheets-and-publications/

Prime Minister's Manufacturing Taskforce
(2012) Smarter Manufacturing for a Smarter Australia – Report of the Non-Govt Members
http://www.innovation.gov.au/Industry/Manufacturing/Taskforce/Pages/default.aspx

Regional Development Institute (2013)
Insight Regional Indicators http://insight.regionalaustralia.org.au/

STATE

Department of Infrastructure and Planning
(2009) South East Queensland Regional Plan 2009 – 2031
http://www.dsdip.qld.gov.au/resources/plan/seq/regional-plan-2009/seq-regional-plan-2009.pdf

Department of Natural Resources and Mines
(2009) SEQ Natural Resource Management Plan
http://www.nrm.qld.gov.au/regional_planning/seq_nrm_plan.html

Department of State Development, Infrastructure and Planning
(2009) SEQ Regional Plan 2009-2031
http://www.dsdip.qld.gov.au/regional-planning/

Office of Economic and Statistical Research (OESR), Queensland Treasury

(2011) Queensland Government Population Projections to 2056
http://www.oesr.qld.gov.au/products/publications/qld-govt-pop-proj-qld-sd/index.php

Premier's Office
(2013) Six Month Action Plan (January – June 2013
http://www.thepremier.qld.gov.au/plans-and-progress/plans/6-months-jan-jun-13.aspx

Queensland Reconstruction Authority
(2013) Queensland Flood Recovery Plan
http://qldreconstruction.org.au/publications-guides/reconstruction-plans/queensland-flood-recovery-program-2013
(2012) Queensland Reconstruction Authority Strategic Plan
http://qldreconstruction.org.au/publications-guides/reconstruction-plans/strategic-plan-2012

Treasury and Trade
(2013) Queensland Regional Profile – Gold Coast City
http://statistics.oesr.qld.gov.au/qld-regional-profiles

LOCAL

City of Gold Coast
(2013) City Economic Challenge 2021
(2013) City of Gold Coast: Economic Development Strategy 2023
(2011) Gold Coast Planning Scheme 2003 Version 1.2 (amended November 2011)
http://www.goldcoast.qld.gov.au/gcplanningscheme_1111/overview.html

(2013) Gold Coast City Transport Strategy 2031
http://www.goldcoast.qld.gov.au/documents/bf/GC-transport-strategy-2031.pdf

(2013) Economic Profile
http://economy.id.com.au/gold-coast/home

(2011) Key Industry and Pacific Innovation Corridor Surveys
http://www.businessgc.com.au/key-industry-and-pacific-innovation-corridor-surveys

(2012) Gold Coast Economic Statistics
http://www.businessgc.com.au/gold-coast-data-sources

(2012) Tourism Facts and Figures
http://businessgc.com.au/index.php?page=Tourism-Facts-and-Figures

OTHER

PwC Price Waterhouse Coopers ***Cities of Opportunities 2012***
http://www.pwc.com.au/industry/government/publications/cities-of-opportunity.htm

Queensland Resources Council ***(2012) Economic Impact of Resources Sector on the Queensland Economy 2011/12***
http://www.queenslandeconomy.com.au/intro

KPMG ***Analysis of the Gold Coast Long Distance Commuter Workforce***
http://rdagoldcoast.org.au/news-and-events/news/bernard-salt-s-gold-coast-report/

SGS Economics and Planning ***Gold Coast Labour Force Capability and Futures Assessment (2013)***
Currently in draft version

ATTACHMENT A – Stakeholder Consultations and Partnerships

MEETINGS

Federal

- Federal Member for McPherson, Karen Andrews MP
- Federal Member for Fadden, Stuart Robert MP
- Federal Member for Moncrieff, Steven Ciobo MP
- Federal Member for Wright, Scott Buchholz MP
- Senator Jan McLucas
- Senator Mark Furner
- DEEWR - Vicki Whybird, Education Skills & Jobs Coordinator
- Kay Strong, Regional Manager GC, AusIndustry – Federal govt initiative/ precincts discussion

State

- Premier Campbell Newman
- Treasurer Tim Nichols MP
- Deputy Leader of the Opposition Tim Mulherin
- John-Paul Langbroek MP, Minister for Education, Training & Employment.
- Jan Stuckey, MP for Minister for Tourism, Major Events, Small Business & the Commonwealth Games
- Steve Toms, NSW Cross Border Commissioner
- Rebecca Andrews, Executive Director Regional Services, DTESB
- Ray Morrison, Manager – Economic Development, SE Regional Office, DSDIP
- Adrian Dawson, Principal Economic Development Officer – Manufacturing, DSDIP
- Paula Hynes, Principal Economic Development Officer, DSDIP
- Linda Cunningham, Principal Economic Development Officer, DSDIP
- Kerry Krebs, Director – Training, SE Region, DETE
- Verity Barton MP, Member for Broadwater
- Michael Crandon MP, Member for Coomera
- Rob Molhoek MP, Member for Southport
- Steve Petith, Electorate Officer – Rob Molhoek, MP for Southport
- Department of State Development, Infrastructure and Planning (DSDIP)
- Office of Economic and Statistical Research (OESR) and Zoe Douglas, Regional Liaison Officer – Southern Queensland Statistics Coordination
- Tourism Queensland (Gold Coast Tourism and Events Queensland)

Local

City of Gold Coast (Local Government Authority)

- Mayor Tom Tate
- Division 1 Cr Donna Gates
- Division 2 Cr William Owen-Jones
- Division 3 Cr Cameron Caldwell
- Division 4 Cr Margaret Grummitt
- Division 5 Cr Tracey Gilmore
- Division 6 Cr Dawn Crichlow
- Division 7 Cr Lex Bell
- Division 8 Cr Bob La Castra

- Division 9 Cr Glenn Tozer
- Division 10 Cr Paul Taylor
- Division 11 Cr Jan Grew
- Division 12 Cr Greg Betts
- Division 13 Cr Daphne McDonald
- Division 14 Cr Chris Robbins
- Toni Brownie, Manager, Economic Development
- Kathy Kruger, Workforce Development Officer
- David Ives, Digital Economies Manager
- Alton Twine, Manager, Transport Planning, Planning Environment & Transport
- Suzette Sutton, Business Development Officer, Economic Development
- Ray McNab, Executive Officer Special Events, Economic Development
- Tanya Lipus, Principal Strategic Project Officer
- Di Dixon, Executive Coordinator, Economic Development

Resource Link GC Steering Committee – Mining and resources

Surf Industry Task Force

Gold Coast Medicare Local

Industry

- 2018 Commonwealth Games CEO Mark Peters
- GoldLinQ – Gold Coast Light Rail
- Busy at Work (Busy Inc.) – NFP apprenticeship and recruitment service for business
- Adam Bennett-Smith, Owner of Koho
- Property Council Australia (GG) Committee
- Mining expo meetings
- Co-working centres – Co Spaces, Gold Coast Co Working, WorkClub Gold Coast, Silicon Lakes Ltd
- Gold Coast Innovation Centre including Angel Investor presentation

Education

- Southern Cross University
- Bond University
- Griffith University
- Gold Coast Institute of TAFE
- Australian Trade College

Other

- Collaborative stakeholders meeting - Business Gold Coast, AusIndustry, DSDIP, DTESB, Tradestart, DEEWR, Enterprise Connect, Aust Institute for Commercialisation
- FIFO – Ongoing meetings and consultations with various stakeholders
- Southport Chamber of Commerce
- Enterprise Connect

EVENTS/ CONFERENCES

Hosted by RDA Gold Coast

Regional Leaders' Forum - was attended by approximately 200 local business leaders, government and education representatives

Chinese Delegation of 17 from the Dept of Housing and Urban – Rural Development, Shandong Province, China

Bernard Salt – Release of report "Analysis of the Gold Coast Long Distance Commuter Workforce" – media conference and lunch attended by 70 guests involved/ potentially involved in FIFO industry

Sponsored by RDA Gold Coast

- Sir Tim Berners-Lee 2013 – Visit to Gold Coast Feb 2013
- MidiCities Conference – in conjunction with RDA Logan & Redlands and RDA Darling Downs and South West (Queensland) 2012
- Australian Association of Angel Investors Annual Conference 2013
- Gold Coast Business Excellence Awards 2012 and 2013
- Intelligent Cities Summit 2013
- Gold Coast Medicare Local - Co-fund workshop initiatives with for e-health and social inclusion. 2013
- Australia's Green Cauldron

Attended by RDA Gold Coast

- NBN Expo and Forum, Coffs Harbour
- Affordable Housing Forum hosted by RDA Logan
- RDA State Wide advisory meetings
- CEDA meetings and functions
- SEQ Cross Border & Australia's Green Cauldron meetings
- Climate Change Commissioner breakfast hosted by RDA Brisbane
- Asia Pacific Cycle Congress 2013
- Gold Coast Australian Information Industry Association Telework Workshop
- Australian Information Industry Association meetings
- Gold Coast Airport mining industry function to promote airport and region as potential FIFO destination
- Australian Institute of Management meetings and workshops (Executive Officer is a Committee Member)
- Digital Expo hosted by RDA Brisbane
- Bleach Festival and the Bleach 'Rethink Event' and Coworking by the Beach initiative.
- Precincts discussion in Brisbane and briefing on telework readiness program
- Asia-Pacific Cycle Congress

ATTACHMENT B – 2013 Gold Coast Regional Profile

The 2013 Gold Coast Regional Profile is a separate document which forms part of the Regional Plan 2013-2016.

We would like to thank Remplan for providing the data for this Profile.

RDA Gold Coast Road Map 2013-2016 Summary

An Australian Government Initiative

Regional Development Australia
GOLD COAST INC

OUR VISION FOR THE GOLD COAST

To be a region internationally recognised and supported by a broad economic base and which is attractive to business and individuals and which offers education, business and lifestyle opportunities

OUR MISSION

To be a highly effective and respected collaborator and facilitator across all levels of government, the community and business to achieve the unique economic, social and environmental potential of the Gold Coast

OUR GOALS FOR THE GOLD COAST

A Connected City
A city connected by good infrastructure and providing access to employment and markets

A Digital City
A city that embraces technology and takes advantage of digital economic opportunities

A Liveable City
A city known for its safety, community well-being, social inclusion, and natural and built amenity

A Competitive City
A city attractive to business, entrepreneurial culture and skilled and educated workforce

OUR PRIORITIES FOR THE GOLD COAST

Workforce
Ensure that the region has the right skill sets, qualifications and training to meet the future labour market opportunities

Sustainable Communities
Ensure that our communities are planned and managed in a way which addresses economic, social, environmental and cultural issues

Investment & Infrastructure
Support and promote initiatives and activities conducive to investment and infrastructure provision with long term regional benefit

Economic Diversity
Support activities which will broaden the region's economic base and reduce dependency on a narrow range of industry

Digital Economy
Assist to position the region as an economy in which residents embrace digital initiatives to achieve improved outcomes

www.rdagoldcoast.org.au