

REGIONAL ROADMAP 2017-2020

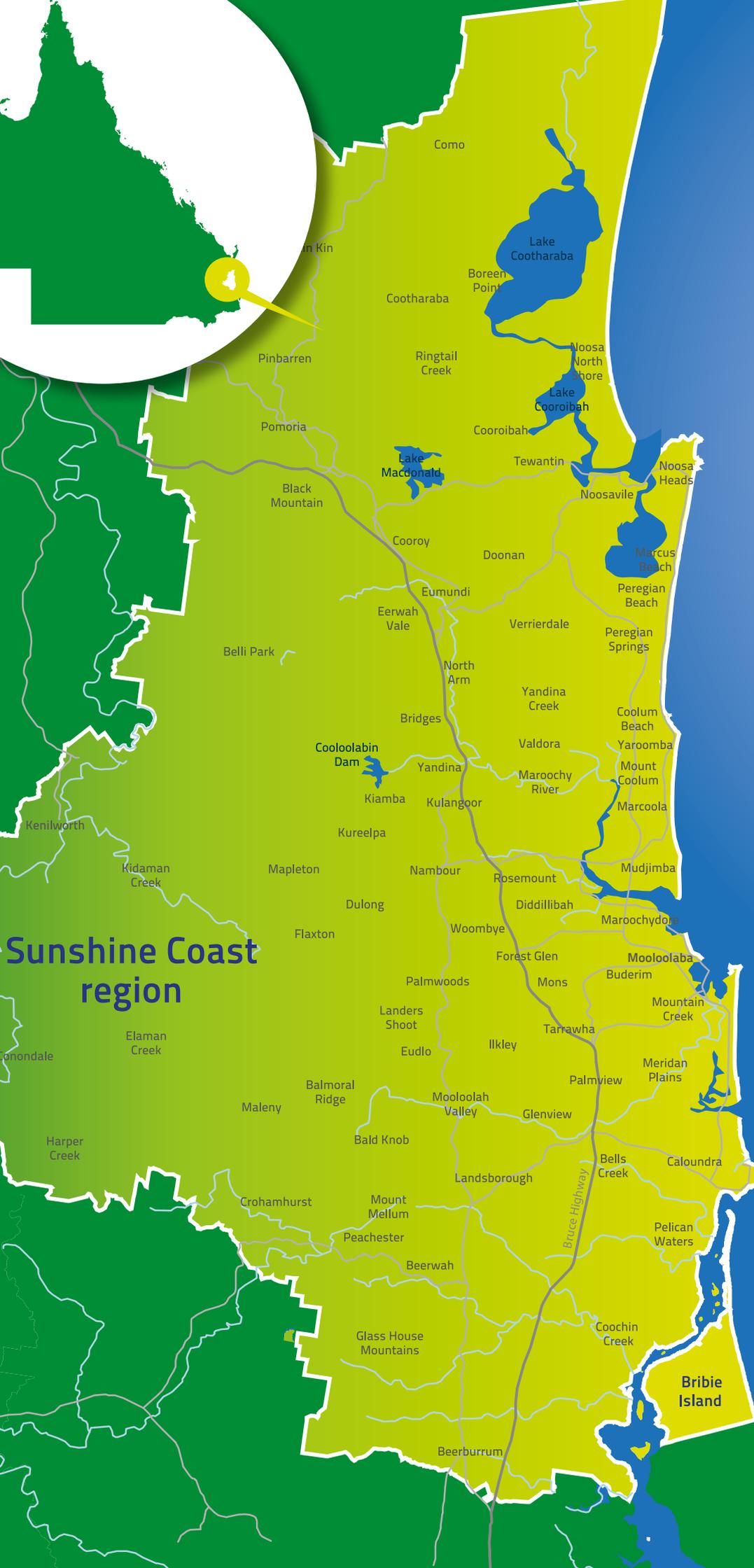


An Australian Government Initiative



Regional
Development
Australia

SUNSHINE COAST INC



Sunshine Coast region

Acknowledgements

The Regional Development Australia Sunshine Coast (RDASC) Committee is the driving force behind the Sunshine Coast Regional Roadmap. The Regional Development Australia Sunshine Coast Regional Roadmap 2017-2020 was coordinated and edited by Nicole Duguid and the RDA Sunshine Coast team consisting of CEO Darrell Edwards, and Shanna Douglas. Graphic Design by Danielle Royall-West (dnd Graphiks).

Traditional Custodians

RDASC acknowledges the traditional custodians and Elders across the region and pays respect to the leaders both past, present and future for they hold the memories, the traditions, the culture and hopes of all Aboriginal people. RDASC also acknowledges the work Sunshine Coast Council has commenced on the Sunshine Coast Council Reconciliation Action Plan.

Disclaimer

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Explanatory Note

It should be noted that ABS Census data for 2016 will not be available until late 2017 and as such this document uses ABS census data from 2011, unless otherwise stated.

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Cranes in the skyline

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Message from the Chair

Regional Development Australia Sunshine Coast's (RDASC) Regional Roadmap 2017–20 has been developed in collaboration with both the Noosa and Sunshine Coast Councils and includes strategies that show the changing priorities for a region that is developing and adapting to the challenges and disruptions in a modern economy. Input has been gathered from key organisations, regional leaders and all levels of government to articulate priorities for the Sunshine Coast.

Our Regional Roadmap focuses on the projects that the Sunshine Coast community sees as a priority for the region: Economic Prosperity and Core Infrastructure.

Increasing Core Transport Infrastructure is key to connectivity, mobility and growth of the region. While the Roadmap highlights the importance of this infrastructure to our region, the words have little impact unless we can identify how we can fund and ultimately deliver these projects.

There are many who believe that the question of funding is the responsibility of the various levels of government and it is for them to build. If we adhere solely to this mantra it will be a long time before we see all the requisite infrastructure for our region. I say that not as a criticism of government but in recognition of the fact that we are in an era of constrained capital and many competing priorities for Federal and State funding.

RDASC encourages debate and support for smarter infrastructure solutions, reducing costs and increasing productivity in the construction industry and consideration of alternate funding methods. It is time for actions that drive outcomes. Rather than see this as a difficult challenge, I believe it presents us with an opportunity to take control of our region's future and determine when infrastructure is delivered.

Our local elected representatives across three levels of government: Local, Federal and State continue to actively fight for our fair share of infrastructure funding. We have seen them succeed with a number of wins including national road funding for the Bruce Highway Upgrade and the delivery of the Sunshine Coast University Hospital, both delivering great benefit for our region.

RDASC has increased its focus on developing the Digital Economy to capture innovation, entrepreneurship and harness digital technologies which increase productivity, efficiency and profitability of Small to Medium businesses. We are also committed to delivering the Digital Sunshine Coast Action Plan and Queensland Government's Advancing Regional Innovation Program with Noosa Shire Council and Sunshine Coast Council, in conjunction with many collaborators.

By celebrating our advantages and working to overcome our challenges, together we have an enormous opportunity to prosper as a vibrant, modern community with a sustainable and enviable lifestyle.

The RDASC committee and staff are proud of our achievements to date, but there is much work still to be done. We look forward to collaborating with our key stakeholders into the future for the betterment of the Sunshine Coast.

Tony Riddle
Chair, Regional Development Australia Sunshine Coast

Sunshine Coast University Private Hospital

Executive Summary

A vision for the future

The RDA Sunshine Coast Regional Roadmap 2017–20 takes a local, state, and national perspective to building a vision for the Sunshine Coast region and identifies associated priorities to assist in the growth of the region. The Sunshine Coast region will need a coordinated and collaborative approach to building the region's infrastructure and economic development opportunities so that the region achieves a vision where our communities are innovative, dynamic, connected and sustainable. Regional collaboration and partnerships are central to the growth of a strong region, and RDASC plays a significant role in assisting the region with integrated and coordinated planning.

RDASC and the region

RDASC's role is to help facilitate dialogue across all levels of government and key stakeholders in the region to assist in integrated planning and to raise the profile of the region. The region has over 341,000 people across both the Noosa Shire Council and Sunshine Coast Council with a geographical footprint of more than 3,000 sq km. The region currently has a GRP of approximately \$15.5 billion per annum which will need to grow through increased infrastructure and economic diversity if it is to support our growing population (NIEIR 2016a, p.167). The population is expected to grow to around 514,000 people by 2036 and to support this growth further capital investment into the region is needed by both public and private entities (QGSO 2017a).

RDASC's priorities and projects have been identified to assist in the long-term economic growth of the region. Our role is to support, lead, advocate, participate, facilitate, and encourage delivery of region-building projects.

Stakeholder consultation has identified some emerging challenges that will need to be addressed to encourage long-term regional growth. These challenges include:

- Creating growth in the economy through economic development opportunities
- Creating employment across all demographics despite an ageing population, reduced participation and digital disruption
- Fostering innovation and entrepreneurship
- Creating connective and productive communities with education pathways
- Providing regional transport infrastructure that supports growth
- Ensuring digital infrastructure and projects that support smart communities

Opportunities for investment and growth

There are a number of catalytic projects that have been identified across the region that will support the region's economic prosperity:

Infrastructure Development projects

- Bruce Highway upgrades
- North Coast Rail Duplication
- CAMCOS – Caboolture to Maroochy Corridor Study
- Regional Freight Hub aligned to the National Freight Strategy
- Integrated Regional Transport Infrastructure Plan
- Sunshine Coast Airport Expansion
- International Undersea Broadband Cable
- Maroochydhore – The Bright City project
- Peregian Digital Hub
- Sunshine Coast University Hospital, Health Hub, and Skills, Academic and Research Centre
- University of Sunshine Coast expansion Moreton University Precinct

Economic Development projects

- Digital Sunshine Coast project
- Digital Scorecard program
- Advancing Regional Innovation program
- Mobilise Youth program

The Australian Government's Building Better Regions Fund (BBRF) will also be important to assist in the development of various economic and infrastructure projects across the region.

The new Maroochydore city centre featuring a network of city streets, waterways and parks



The Regional Roadmap

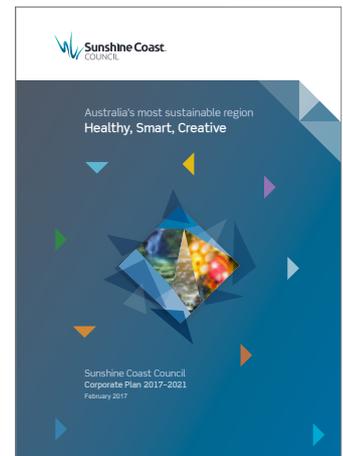
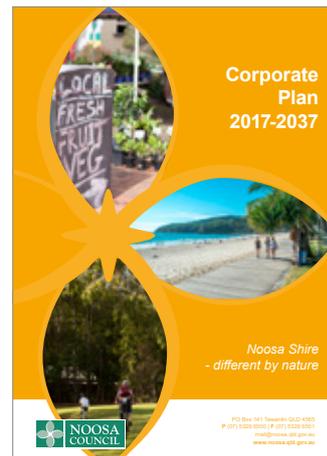
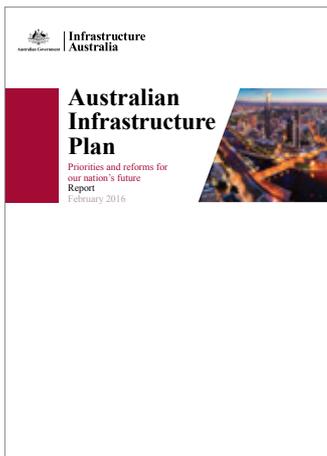
The Regional Roadmap is developed through extensive engagement with regional communities to identify a long-term vision and associated key projects that will enable the growth of the region. This roadmap has a strong focus on supporting economic growth and building infrastructure for the future and will encourage dialogue and planning in a more collaborative and coordinated manner.

Strategic Alignment

The Regional Roadmap supports the implementation of the Australian Infrastructure Plan 2016 which identifies infrastructure reform and investment for a more prosperous nation and identifies priorities such as affordable, innovative and competitive energy, telecommunications, water and transport services.

The Roadmap also supports the implementation of the Queensland Government State Infrastructure Plan (2016) which underpins economic growth, supports jobs and creates long-term prosperity for all Queenslanders.

The Roadmap reflects the two local governments' visions to build the priorities within this plan. Noosa Council's values and vision - "Noosa Shire - different by nature", and Sunshine Coast's vision "To be Australia's most sustainable region - Healthy, Smart, Creative". The overall intent of the roadmap draws upon the local governments' visions which are to build sustainable and connected communities with enhanced economic development (Noosa Corporate Plan 2017-2037; Sunshine Coast Council Corporate Plan 2017-2021).





Noosa Hinterland

Role of RDA

Regional Development Australia (RDA) is a national network of 55 committees made up of local leaders who work with all levels of government, business and community groups to support the development of their regions.

The key outcomes for Regional Development Australia include

- Create a regional plan that focuses on economic development for the region
- Provide advice to the Australian Government on critical issues affecting the region
- Identify priority activities that will drive regional economic development based on consultation and engagement with community leaders
- Promote the Building Better Regions Fund and assist local community stakeholders to develop project proposals
- Promote awareness of Australian Government programs within the region

Building Better Regions Fund

The Australian Government provides funding for regional, rural and remote communities through the Building Better Regions Fund (BBRF), previously National Stronger Regions Fund (NSRF). The aim of the funding program is to create jobs, drive economic growth, and enhance liveability in regional areas through investments in two streams; infrastructure projects, and community investments. The fund is part of a \$1 billion commitment by the Australian Government to support regional economic growth and RDA's role is to assist organisations to apply for funding.

Grants are available through two funding streams:

- Infrastructure Projects Stream will support projects which involve the construction of new infrastructure, or the upgrade or extension of existing infrastructure that provide economic and social benefits to regional and remote areas.
- Community Investments Stream will fund community building activities including, but not limited to, new or expanded local events, strategic regional plans, and leadership and capability building activities. These projects will deliver economic and social benefits to regional and remote communities.



Our Vision

Our Vision is a Sunshine Coast that is
***innovative, dynamic,
connected and sustainable.***

Our Mission

Our Mission is to **connect people** from within our region and across other regions to **strengthen business growth**, generate **innovative sustainable solutions** and enhance **economic development**.



Our Committee

RDASC is committed to good governance and efficient administration, and focuses on delivering the business plan and Regional Roadmap. We will proactively monitor regional development opportunities and encourage greater infrastructure and economic development initiatives across the region.

Local people delivering local solutions to local issues and opportunities



Tony Riddle (Chair)



Dr Ian Young (Deputy Chair)



Glenn Ferguson AM (Secretary)



Brook Kitson (Treasurer)



Cameron Hall



Professor Birgit Lohmann



Michael Whittaker (Ex Officio)



Brett De Chastel (Ex Officio)



Aerial photo of Maroochydore

Setting Our Priorities – Analysis of the Region

The region is situated approximately 100 km north of Brisbane with coastal communities from Caloundra to Noosa. There are significant inland communities along the Blackall range such as Maleny, Montville, Kenilworth and Connondale. At the foothills of the Blackall range is Nambour known for its sugarcane, pineapples and tropical fruits.

Historically, the region was built on agriculture and timber industries but more recently employment has been driven by education services, tourism, healthcare, construction, and retail. Furthermore, the knowledge economy is transforming commuter patterns and increasing opportunities in digital industries.

The major freight corridor connecting Brisbane to Cairns runs along the Bruce Highway and is in close proximity to the Sunshine Coast airport. There are currently two universities in the region; University of the Sunshine Coast including an Innovation Centre, and Central Queensland University. The region has a total area of 3,126.3 km² with an average daily temperature range of 14.6 °C to 25.0 °C and an average rainfall of 1,624 mm each year (QGSO 2017a).

Fast Facts

- There are two local government areas in the region **Noosa LGA – 54,022 persons** and **Sunshine Coast LGA 292,990 persons** (as at 30 June 2016) (QGSO 2017a).
- **Regional GRP estimate \$15.5 billion** for 2016 (NIEIR 2016a, p.167)
- Estimated Resident **Population 347,012** (as at 30 June 2016). This is projected to increase to **514,927 by 2036** with the annual growth rate estimated at 1.9% (QGSO 2017a).
- **Median age of 43.1** years compared to Queensland with a median age of 36.9 as at 30 June 2015 (**Noosa LGA** being higher again at **47.2** years) (QGSO 2017a).
- The median total **personal income** for the **Sunshine Coast is \$38,755** – lower than the Queensland median of \$45,711 (QGSO 2017a).
- **Indigenous population 1.5%** compared to 3.6% across Queensland (QGSO 2017a).
- **36,002 registered businesses** located on the Sunshine Coast (SA4 in 2015-16) (QGSO 2017b).
- Employment by industry across the region: **Health and Social Services 13.3%, Retail Trade 12.7%, Construction 11.6%, Accommodation and Food 9.1%, Education 8.1%** (QGSO 2017a) (Refer: Figure 1 – Appendix 4).
- The three highest **growth industries** in the region – **Health, Education, and Professional Services** – are positioned in the top two quadrants i.e. predicted to have a significant disruption in technology over the short to long term (Deloitte 2012) (Refer: Figure 2 – Appendix 4).
- The **structure of employment** will change dramatically as a result of **Digital Disruption** (Deloitte Access Economics 2013, p.ii) (Refer: Figure 3 – Appendix 4).
- Agriculture product (2014-15) – Gross Value **Agricultural Product \$238 million** (ABARES 2016).
- **International visitors 231,000**, an increase from previous year of 19.9%, total **expenditure \$266 million** ('Coast records highest ever international holiday visitor numbers' 2017; TEQ 2016).
- **Domestic visitors 3,394,000**, an increase from previous year 15.2%, total **expenditure \$2.1 billion** (TEQ 2016; TRA 2017).
- Over 50,000 people – **20.2%** of population undertake **voluntary work** as compared to Queensland 18.7% (QGSO 2017a).



Employment growth, participation and unemployment on the Sunshine Coast

- Sunshine Coast unemployment rate is 4.7%, compared to Queensland rate of 6.1% (Feb 2017). Since Dec 2015 the region's unemployment rate has dropped below the QLD rate (QGSO 2017a) (Refer: Figure 4 - Appendix 4).
- Much of the drop in unemployment rate is related to lower participation rates in the region (Deloitte 2017, p.2).
- Participation rates in the Sunshine Coast have dropped significantly in the last year from 59.3% to 56.7% (Nov 2016). The 55-64 year age group is driving lower participation rates in the Sunshine Coast with participation rate for this age group at 53.5%, compared to 63.6% in Queensland. The 55-64 year age group grew more rapidly on Sunshine Coast at 16.3% compared to Queensland 14.5%. If growth in this age group continues into the future, it may translate to a lower overall participation rate (Deloitte 2017, p.2).
- The Sunshine Coast region has an ageing population with the median age of 42.9 years (QGSO 2017a).
- The percentage of persons 55+ has grown from 26.9% (2001) of population to 34.1% (2016), which is the fastest growing population on the Sunshine Coast; whereas the age group 30-54 years has dropped from 35.7% to 31.2% (2001-2016) (NIEIR 2016a, p.167).
- Over the last three years, total employment on the Sunshine Coast has contracted by 2.2%, while Queensland employment has grown by 0.2% (Deloitte 2017, p.4).
- Part-time workers accounted for 37.2% of Sunshine Coast workers which is substantially higher than Queensland at 31%. Strong part-time employment is largely due to high service-based workers in tourism, retail and accommodation, and food services (Deloitte 2017, p.4).
- Youth unemployment on the Sunshine Coast is 11.3% (Feb 2017) which has increased from last year - 8.4% (Feb 2016), and is lower than Queensland average youth unemployment 13.6% (QGSO 2017c) (Refer: Figure 5 - Appendix 4).
- 22.2% persons living on the Sunshine Coast are working outside the region and 2.2% did not state a place of work (QGSO 2014).



Mooloolaba Triathlon



What the statistics are telling us about the region and its future challenges

- Sunshine Coast's unemployment rate has dropped to a low of 4.7% compared to Queensland's 6.1% (Feb 2017) but there appears to be other underlying structural issues affecting these unemployment figures: participation rates, ageing population and workers travelling outside the region for work (QGSO 2017a). **The unemployment rate disguises the fact that employment dropped by 2.2% last year (Deloitte 2017, p.4).**
- The region's youth unemployment has recently increased from 8.4% to 11.3% which is lower than the state average at 13.6% (QGSO 2017c). Based on census data, the proportion of 15–25 year olds is falling faster than the proportion across Queensland (Deloitte 2017, p.4). **We need to create more jobs for youth to reduce migration from the region.**
- The 2011 census data revealed that 22.2 % of people on the Sunshine Coast work outside of the region. Further data from the 2016 census will provide additional insight into journey to work patterns and will assist in future transport infrastructure planning on the Sunshine Coast (QGSO 2014). **We need to create more jobs to improve self-containment of employment and reduce commuters for work.**
- Population figures are estimated to increase significantly from approx. 341,000 to over 514,000 by 2036, which will place substantial pressure on road infrastructure and the need for jobs on the Sunshine Coast (QGSO 2017a). The new SEQ Regional Plan 2016 estimates that Sunshine Coast populations will grow to 558,000 by 2041 (DILGP 2016a, p.99). **Sunshine Coast's growth has historically been population led, however this is not sustainable if employment growth doesn't match. This may cause more migratory workers increasing pressure on infrastructure.**
- The GRP is estimated to grow from \$15 billion to \$33 billion by 2033 through the growth of the seven high-value industries: Knowledge Industries and Professional Services; Tourism, Sport and Leisure; Clean Technologies; Aviation and Aerospace; Education and Research; Agribusiness; and Health and Wellbeing (NIEIR 2016, p.167). **The expansion of these industries will be critical to support the growing populations and to decrease the amount of people travelling outside the region for work.**
- The projected increase in GRP from \$15 to \$33 billion would move the current GRP per capita from approximately \$44,000 to over \$64,000 per person which is similar to the 2012 Australian nominal GDP per capita at the height of the mining boom at \$67,854 (NIEIR 2016a, p.166). **This would represent a substantial increase to the productivity of the region.**
- Current research by Stanley and Brain (NIEIR 2016, p.31), demonstrates the relationship between the scale of populations and the productivity of a city in relation to GRP. Cities with less than 1 million people are more likely to have lower GRP per capita (around \$20,000 - \$30,000). At present, this emulates the Sunshine Coast's position and poses issues about the possibilities of increasing the Sunshine Coast GRP per capita to the Australian average when the population will only be 500,000 people. **This justifies increased emphasis on the seven high value industries to increase the productivity of the region.**
- The region has a growing population but also an ageing population with an average age of 42.9 years – higher than Queensland average of 36.9 years (QGSO 2017a). The emphasis on a knowledge economy and a digital future will assist people to stay in work longer and provide greater flexibility for work opportunities. **If the Sunshine Coast population continues to age more rapidly than the Queensland average, this will increase demand for employment in the aged care sector.**

Given the research, the Sunshine Coast Region will need to focus on innovation and knowledge economy jobs to assist in long term economic growth but in tandem with more appropriate infrastructure investment to support and attract industry and skilled labour.



Boreen Point Campground

What the community is telling us about the region...

#Speed it Up Campaign

RDASC conducted a survey to inform Digital Sunshine Coast's actions and support the Speed it Up Campaign. Respondents provided information on the digital capacity of businesses on the Sunshine Coast which included:



98% of respondents wanted **faster and/or more stable internet** for their business needs



71% of respondents want both **faster and more stable internet**

3 out of 4 Sunshine Coast businesses have an internet connection with **download speed slower** than the **national average**



9 in 10 Sunshine Coast businesses experience **upload speeds slower** than the **national average**



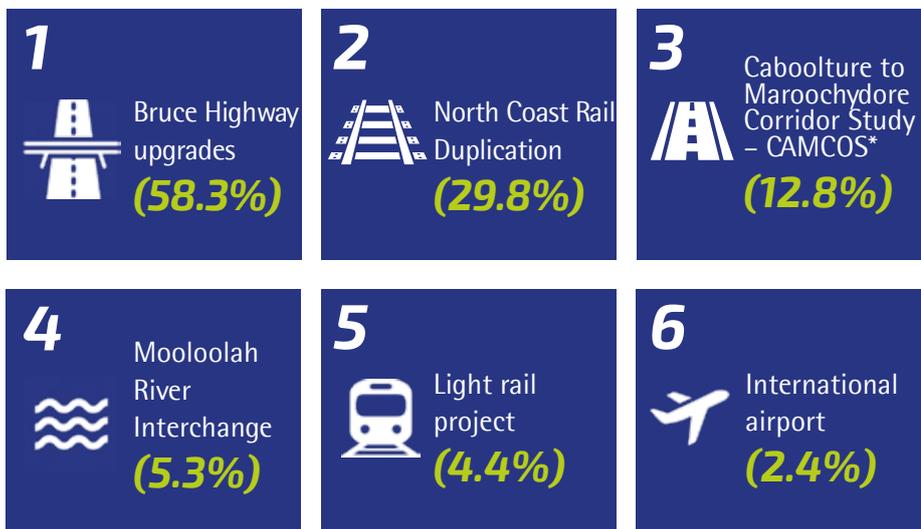


Kings Beach at night

RDASC regional intelligence

RDASC Transport Infrastructure Survey

In December 2016, RDASC conducted a region-wide transport survey with 768 responses. The survey found the most urgent transport infrastructure needs for the Sunshine Coast were (based on each project being ranked as no.1);



Would you support private ownership of key transport infrastructure if it accelerated delivery? **62% YES**

Would you be willing to pay a toll at the Mooloolah River Interchange (MRI) if it meant getting to your destination faster? **64% NO**

Would you use the train to travel to Brisbane if it was faster and more cost effective? **87% YES**

Would you use public transport more frequently if it was cheaper, faster and more reliable? **86% YES**

Would you carpool or ride-share using a ride-share app? **27% YES, 40% NO, 33% Maybe**



Caloundra Music Festival

Key determinants of long-term regional economic growth for the Sunshine Coast Region

Long-term regional economic growth can be influenced by a number of factors such as human capital, sustainable communities, comparative advantage and access to markets.

RDASC priorities and projects have been identified to assist in the long-term economic growth of the region. Regional collaboration and partnerships are central to the growth of a strong region, and the RDASC can play a significant role in assisting the region with integrated and coordinated planning.



Adapted from: Framework for Regional Economic Development, Department of Regional Australia, Local Government, Arts and Sport (DRALGAS)



Surf skiing Mooloolaba Beach

Regional Projects and Initiatives

The regional roadmap takes into consideration multiple critical issues facing our Sunshine Coast.

The Sunshine Coast region needs to grow its population and create sustainable communities by nurturing high-potential economic development opportunities that enable global competitiveness, and at the same time attract and retain a diverse workforce. The projects identified in this section will support the region's economic prosperity by:

- Nurturing high potential economic development opportunities, initiatives and industries towards global competitiveness and support major projects that have far-reaching benefits across the Sunshine Coast Community
- Helping businesses, institutions and communities improve their resilience, competitiveness, connectivity and self-sufficiency by embracing innovation, entrepreneurship and digital technologies.
- Supporting and nurturing the start-up, emerging and established entrepreneurial ecosystem – particularly with regard to businesses utilising innovative, disruptive, and emerging digital technologies.
- Leading and supporting education pathways that create employment for youth.



Boreen Point Campground

Fostering innovation, entrepreneurship and knowledge economy

The latest research from the State of the Region (SOR) Report (NIEIR 2016b, p.19), highlights that high-income economies depend on sustained innovation as the core driver of long-term economic growth. The capacity to innovate depends on knowledge and networks at the regional level, and that most high income countries and regions which have maintained sustainable growth have done so because they have established successful knowledge based regions (NIEIR 2016b, p.20). These regions have a high concentration of highly skilled global knowledge workers, such as scientists and engineers, and these workers tend to migrate to regions with a wide variety of cultural and lifestyle choices (NIEIR 2016b, p.20)

The region will drive innovation and entrepreneurial activities to become globally competitive and grow the region's economic base. Supporting and nurturing the start-up, emerging and established entrepreneurial ecosystem – particularly with regard to businesses utilising innovative, disruptive, and emerging digital technologies.



Advancing Regional Innovation Program

The Queensland Government's Advancing Regional Innovation Program encourages innovation across Queensland and supports local economies to create jobs for regional Queenslanders. RDASC, Sunshine Coast Council, and Noosa Council are lead collaborators in the project that aims to attract, connect, and support innovators across the Sunshine Coast region. The project is being managed by the Sunshine Coast Regional Innovation Pipeline Team (#SCRIPT) who are working toward a collaborative action plan. Over 20 partners are collaborating on the project including local governments, not for profit and industry which demonstrates the Sunshine Coast's strength in innovation ecosystems.

Digital Sunshine Coast

Digital Sunshine Coast is a collaborative project hosted by RDASC, Sunshine Coast Council, and

Noosa Council in partnership with a large network of organisations and individuals. The Digital Sunshine Coast Action Plan has a number of activities including: Helping businesses, institutions and communities improve their resilience, competitiveness, connectivity and self-sufficiency by embracing innovation, entrepreneurship and digital technologies.

Digital Scorecard Program

RDASC partnered with the Queensland Government Department of Science, Information Technology and Innovation (DSITI) to deliver the Digital Scorecard program. The Digital Scorecard will help businesses identify ways to improve their digital capability and be more competitive in a global digital economy.

Ripple Effect - Catalytic Projects

RDASC is working closely with Sunshine Coast Chamber Alliance and

the Sunshine Coast Business Council to educate the business community about the 'ripple effect' of the \$1.8bn Sunshine Coast University Hospital and how to best capitalise on these opportunities. This will provide a template for future catalytic projects and ensure Small to Medium enterprises participate in the "ripple effect". RDASC are also contributing to the SCUH Interagency Taskforce to improve traffic and congestion around the hospital precinct.

SPEED IT UP Campaign

The SPEED IT UP Campaign was launched to promote and accelerate investment in digital infrastructure on the Sunshine Coast. The campaign involved the collection of information about business-grade broadband needs to better understand broadband issues on the Sunshine Coast. The survey results (see p17) will inform and support investment decisions for improved digital infrastructure.





University of the Sunshine Coast

Creating connective productive communities with education pathways

A high priority for the region is to grow employment and continue to develop education and skills opportunities through various pathways including a strong university sector. Along with employment and training, a focus on the advancement of leadership roles and capacity building will strengthen human capital across the region, leading and supporting education pathways that create employment for youth. The Sunshine Coast will continue to develop as a smart region with smart technologies. Digital innovation will allow for smart supply chain management, greater business intelligence and greater mobility for our communities.

Sunshine Coast University Hospital (SCUH) and health hub

Sunshine Coast University Hospital (SCUH) is a new \$1.8 billion healthcare precinct which is co-located with the \$150 million Sunshine Coast University Private hospital. SCUH has developed a \$60.8 million Skills, Academic and Research Centre to help students transition from studying healthcare into the workforce and provide strong linkage between the University of Sunshine Coast and healthcare industry for research purposes.

University of Sunshine Coast Expansion - Moreton University Precinct

The University of Sunshine Coast is one of Australia's top universities for teaching quality, and has been selected to develop the new Moreton Bay Region University Precinct at Petrie. The Petrie campus will have a comprehensive offering of courses including law, business, science, engineering and many specialty courses such as mechatronics.

Coding and Programming Curriculum

RDASC, in partnership with TAFE Queensland East Coast and Sunshine Coast Council launched the Introduction to Coding course for anyone looking to develop their skills in coding. After consulting with businesses to better understand industry needs, the six-week TAFE course was developed as a pathway to employment as there is currently no vocational/tertiary coding and programming curriculum post high school to ensure people are employment-ready.

Mobilise Youth

Mobilise Youth is a learner driver mentor program designed to address the barriers to employment or apprenticeships that underprivileged and vulnerable youth face in gaining the hours of driving experience required to obtain a probationary licence. There are a number of organisations collaborating to bring the pilot program to fruition – Integrated Family and Youth Services (IFYS), Community Solutions, United Synergies, and RDASC.

Start-up business curriculum

The Startup Business Curriculum will be delivered through TAFE Queensland East Coast and will be directed at Year 11 and 12 students who do not wish to attend university but would like to start their own businesses. The course will encourage innovation and entrepreneurship, and support the local economy by creating jobs for youth on the Sunshine Coast.

Regional transport infrastructure that supports growth

The Sunshine Coast region is competing for scarce capital investment against other productive regions across Australia who may have greater GRP and/or populations.

It is critical for the region to provide solid plans to secure timely investment which demonstrates a return on investment to the Australian economy. The return on investment will need to include economic, environmental and social outcomes.

Transport Infrastructure Planning

RDASC has recently developed a Transport Infrastructure Scoping Paper 2016 and survey (see p17) to uncover implementation solutions to regional transport issues. The information will assist the region to plan for the identification, prioritisation and sequencing of transport infrastructure for growing populations. RDASC is advocating for an Integrated Transport Plan to support a City Deal for the Sunshine Coast; and is also collaborating with Sunshine Coast Business Council in bringing business leaders together to discuss the transport issue.

Public and SMART transport solution (Modal shift)

RDASC understands that major infrastructure projects will have an approximate 5 to 7 year delivery horizon and realise that in the meantime traffic and congestion will need to be managed – this will require a modal shift from single to multi occupant vehicles and/or public transport. RDASC is involving large employer groups in a public transport strategy which includes ride-sharing and active transport.



Sunshine Coast Airport Terminal

Priority Transportation Infrastructure projects

Bruce Highway upgrades

There are a number of Bruce Highway upgrades that will reduce travel times and traffic congestion, improve safety, increase efficiencies in long distance road freight, and support the needs of local communities including tourism traffic. Priority funding areas identified by State and Federal governments include:

- Cooroy to Curra project (estimated project cost \$200 million)
- Maroochydore Road Interchange Upgrade – Stage 1 (estimated project cost \$187 million)
- Caloundra Road to Sunshine Motorway (estimated project cost \$929 million).

We need further investment in the Bruce Highway to reduce congestion, for example: an extra lane southbound from Steve Irwin Way connection, and improved interchanges north of the Pine River.

North Coast Rail Duplication

The proposed initiative is located on the North Coast Line between Beerburrum and Nambour stations. The project involves the duplication of the track, extensions of existing passing loops and improvements to stations along the route. The improvements will facilitate greater flexibility and passing opportunities, improving the efficiency of both passenger and freight services, and take pressure off the Bruce Highway.

CAMCOS – Caboolture to Maroochydore Corridor Study

The Caboolture to Maroochydore Corridor Study proposed a passenger rail service branching off the North Coast railway line at Beerwah and extending through Caloundra to Maroochydore. The proposed rail line will provide a public transport spine for the Sunshine Coast and link the coastal urban area to Brisbane.

National Freight Corridor and Regional Freight Hub

The National Freight and Supply Chain Strategy is a federal government initiative by Infrastructure Australia to improve freight and supply chain issues across Australia. A regional freight hub would assist Sunshine Coast to increase productivity and reduce congestion issues on the Bruce Highway.

Sunshine Coast Airport Expansion

The Sunshine Coast Airport expansion project will deliver new infrastructure and facilities enabling enhanced domestic and international flight access to the region. This will also facilitate new freight capabilities and more direct access to global markets (Sunshine Coast Council 2016, p.46). This project is ongoing and the new runway is expected to be open and operating in 2020. (Department of State Development 2017).

Mooloolah River Interchange (MRI)

The MRI works will provide the transport capacity needed to support the Sunshine Coast University Hospital precinct. This is a new two-lane motorway connecting Caloundra, the Hospital precinct, and Mooloolaba to Sunshine Coast motorway.



Digital infrastructure and projects that support smart communities



Innovation and the adoption of digital technologies will be a key driver of economic prosperity for the Sunshine Coast. More than 80% of Australian business leaders believe innovation is the main driver to creating a competitive economy and the best way to improve productivity (Equitise 2015). Digital connections are transforming business, social and environmental opportunities on a daily basis on the Sunshine Coast. The Sunshine Coast digital economy has been recognised by Mark Sowerby (Queensland Chief Entrepreneur) as a leader at regional, state and national levels (Austin 2017).

Smart Communities | Maroochydore - The Bright City (SunCentral)

Maroochydore's New Central Business District is a green-field site being transformed into a new smart city in the geographic centre of the Sunshine Coast. The Maroochydore city centre will have a strong focus on innovation and technology, and excellence in urban design. The 53-hectare site includes prime commercial office space, retail, residential and cultural precincts, an entertainment, convention and exhibition centre, all surrounded by extensive parks and waterways. This project will create a new central business district for the Sunshine Coast and an estimated 5,000 new jobs by 2020, and 15,000 new jobs by 2025. This project will provide a \$4.4 billion boost to the Sunshine Coast economy.

Digital Communities - Peregrin Digital Hub

Noosa Shire Council is developing a modern, flexible, shared workspace called the Peregrin Digital Hub to assist the local economy to grow. It

is a shared workspace for a range of complementary activities, including commercial businesses, public sector and community organisations. It offers high-speed and cutting-edge technical facilities and services, as well as meeting rooms, event and training spaces, with a focus on bringing people together. The cost of the project is over \$3 million.

International Submarine Broadband Cable

Sunshine Coast Council has lodged a submission with the Australian Communications and Media Authority (ACMA) to start the process to declare an offshore cable protection zone for the proposed International Submarine Broadband Cable. If the application is accepted, work will begin on a business case and market sounding to identify proponents interested in leading and delivering the project.

Entrepreneurial Ecosystem

The Sunshine Coast has a unique Entrepreneurial Ecosystem, where industry contemporaries collaborate, and where new ideas, entrepreneurs and start-ups are not only encouraged – they are actively supported. Digital Sunshine Coast is in the ongoing process of mapping the Coast's Entrepreneurial Ecosystem to capture the support and resources available for new, emerging and established entrepreneurs within the Sunshine Coast region. The Entrepreneurial Ecosystem will assist with networking, connectivity and collaboration within the regions.

Digital Work Hub Project

RDASC is continuing to develop the Digital Work Hub project to advance networking and collaboration across regions, and seeks to leverage off the current research and expand the network to identify all co-working spaces (and their activities) across the twelve Queensland RDA regions. The project will facilitate collaboration and partnerships that will strengthen Queensland's position as a leader of innovation, entrepreneurship and business development.

Sunshine Coast Region Catalytic Projects



Peregian Digital Hub
\$3 million project



Sunshine Coast Solar Farm (>\$10 million economic benefit)



Sunshine Coast Airport Expansion \$347 million



Sunshine Plaza Expansion (\$400 million expansion)



Maroochydore Bright City Project (\$4.4 billion increase to regional economy)



Mooloolah River Interchange (MRI) (\$440 million project)



Sunshine Coast University Hospital, Health Hub and Skills Academic and Research Centre (Public hospital \$1.8 billion, Private hospital \$150 million, and research centre \$60.8 million)



International Submarine Broadband Cable (\$700 million economic benefit regional economy) (Proposed)



Oceanside – Australia's healthiest city by the beach (\$13.3 billion contribution to economy 2013)



North Coast Rail Duplication (\$540m 2014)



Harmony (Palmview) Development (\$3 billion construction)



Bruce Highway upgrades (over \$1.3 billion)



Aura – City of Colour | (Caloundra South) Priority Development Area (\$7 billion + investment)



Sunshine Park (\$90 million project) (Proposed)



CAMCOS (Caboolture to Maroochy Corridor) (over \$1 billion for entire corridor - first stage \$480m)

Projects supplied by Noosa Council and Sunshine Coast Council

Appendix 1: Glossary and Abbreviations

ABARES	Australian Bureau of Agricultural and Resource Economics and Sciences
ABS	Australian Bureau of Statistics
ACMA	Australian Communications and Media Authority
ALGA	Australian Local Government Association
BBRF	Building Better Regions Fund
CAMCOS	Caboolture to Maroochydore Corridor Study
COC	Chamber of Commerce Alliance
CQU	Central Queensland University
CS	Community Solutions
DET	Department of Education and Training (Federal Government)
DILGP	Department of Infrastructure, Local Government and Planning (State Government)
DSC	Digital Sunshine Coast
DSITI	Department of Science, Information Technology and Innovation (State Government)
DTMR	Department of Transport and Main Roads (State Government)
GDP	Gross Domestic Product
GRP	Gross Regional Product
IC	Innovation Centre – University of Sunshine Coast
IFYS	Integrated Family and Youth Services
LGA	Local Government Area
MRI	Mooloolah River Interchange
NBN	National Broadband Network
NC	Noosa Council
NIEIR	National Institute of Economic and Industry Research
NSRF	National Stronger Regions Fund
QGSO	Queensland Government Statisticians Office
RDA	Regional Development Australia
RDASC	Regional Development Australia Sunshine Coast
SA4	Statistical area level 4 (SA4) is one of the spatial units defined under the Australian Statistical Geography Standard (ASGS)
SC	#SiliconCoast
SCBC	Sunshine Coast Business Council
SCC	Sunshine Coast Council
SCUH	Sunshine Coast University Hospital
SEQ	South East Queensland
SOR	State of the Region
SP	Sustainable Partnerships
TAFE	TAFE QLD East Coast
TEQ	Tourism and Events Queensland
US	United Synergies
USC	University of the Sunshine Coast

Appendix 2: A summary of the Sunshine Coast's key economic sectors

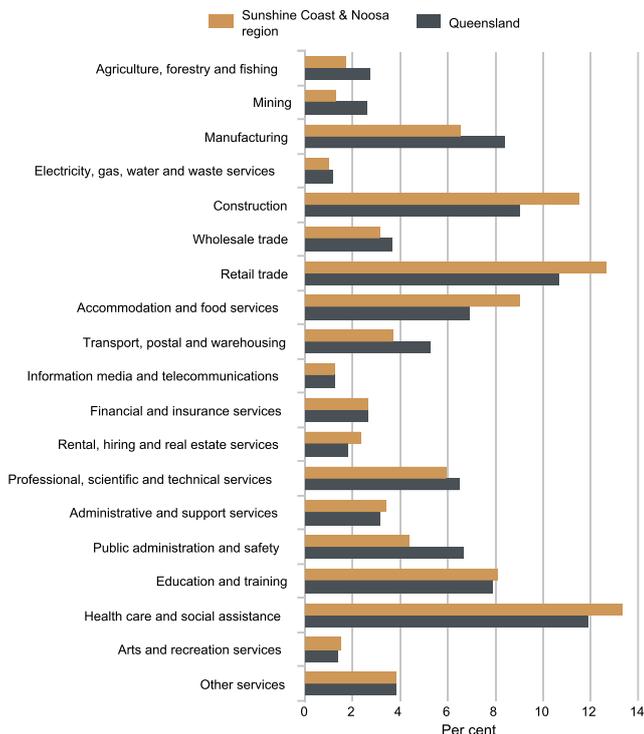
Health	<p>The health care sector on the Sunshine Coast is growing at a rapid rate and is the largest industry employer in the region (QGSO 2017a).</p> <p>The “business of health” provides employment and private enterprise opportunities; and services a growing (and ageing) population. The Sunshine Coast University Hospital is a catalyst for significant opportunity and opened in 2017. The new hospital has over 450 beds; about 3500 staff will work in the new public hospital from opening in 2017 and about 6000 staff will be required to staff the facility by 2021. Approximately 1500 workers were on site each day during peak construction (Queensland Health 2016).</p>
Education and Research	<p>The education and research sector is supported by the University of Sunshine Coast, Central Queensland University and over 180 registered training institutions, with more than 60,000 students studying on the Sunshine Coast (Sunshine Coast Council 2016, p7).</p> <p>This sector is expected to grow significantly over the next 20 years and more than double its workforce from 12,000 to 28,000 workers (Deloitte Access Economics 2013, pii).</p> <p>Both education and research are high value–industry sectors that are key enablers for the region to ensure the long–term provision of highly skilled labour.</p>
Professional, Scientific and Technical Services	<p>The professional and scientific workforce is approximately 9,000 workers in the region and is expected to more than double in the next 20 years. (Deloitte Access Economics 2013, pii).</p> <p>Knowledge workers are linked with high productivity and high–value returns, a key aspiration articulated by local governments' economic development strategies.</p>
Tourism	<p>Tourism is a key driver of the region's economy, contributing to both the accommodation and food services sectors, and in part to the retail sector and professional services.</p> <p>Total visitors to the region was approx. 3.5 million which has increased from the previous year by 12.9% and total expenditure of \$2.3 billion which has increased by 17.2% from the previous year (TEQ 2016).</p> <p>International visitors to the Sunshine Coast grew 6.4%, with the NZ market being the greatest source of international visitors followed by UK and Germany (TEQ 2016).</p> <p>Further expansion of the Sunshine Coast Airport will allow for greater domestic and international visitors.</p>
Agriculture and Food	<p>Agriculture and food play a strong role in the region's economy. \$238 million (ABARES 2016) derived from agricultural commodities but further growth in this sector will help strengthen the economic diversity and structure of the economy.</p> <p>The region has a rich history of primary production, sophisticated food manufacturing outlets, and a high number of internationally renowned restaurants, coupled with growing populations and visitor numbers. The expansion of the airport could also support a growing clean foods industry with opportunities to exports to Asian and international markets.</p>
Construction	<p>Construction is the third largest employer in the region and a major contributor to the economy (QGSO 2017a).</p> <p>The region heavily relies on the construction industry sector due to the past and future population growth, and the need to service residential housing demand and infrastructure developments.</p>
Mining and Flexible Workforce	<p>The upgrade to the Sunshine Coast Airport and a region-wide focus on the digital economy will position the region to capitalise on a flexible workforce and a hub for mining services sector into the future. The concept of FIFO not only applies to the mining sector but many other industries that can have a mobile workforce such as military, health, construction and financial services.</p>

Appendix 3: Regional Projects, Government Priorities and Stakeholders

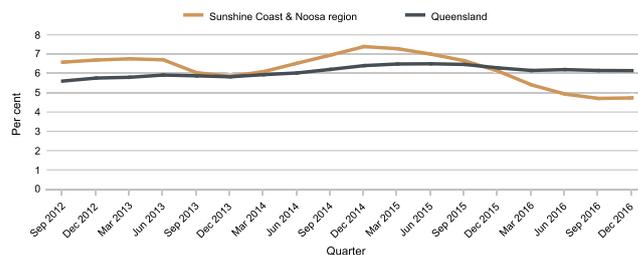
The table below summarises the regional projects and initiatives, associated government priorities and the key stakeholders involved in the projects.

Regional Priority		Project/Activity	Government Priorities	Key Stakeholders
Economic development	Digital capacity and skills building	Digital Scorecard Program	<ul style="list-style-type: none"> Advance Queensland National Innovation and Science Agenda Sunshine Coast Council Regional Economic Development Strategy Noosa Council Local Economic Plan 	<ul style="list-style-type: none"> DSITI Sunshine Coast Council Noosa Council
	Regional economic development strategies	Mobilise Youth – Learner Driver Mentor Program	<ul style="list-style-type: none"> Sunshine Coast Council Regional Economic Development Strategy Noosa Council Local Economic Plan Youth Employment Strategy 	<ul style="list-style-type: none"> Community Solutions IFYS United Synergies
		The Ripple Effect	<ul style="list-style-type: none"> Sunshine Coast Council 	<ul style="list-style-type: none"> Sunshine Coast Business Collaborative Sunshine Coast Collaborative Sunshine Coast Chamber Alliance
Infrastructure	Digital Infrastructure	Speed it Up Broadband Infrastructure Advocacy Campaign	<ul style="list-style-type: none"> NBN Advance Queensland National Innovation and Science Agenda Sunshine Coast Council Regional Economic Development Strategy Noosa Council Local Economic Plan 	<ul style="list-style-type: none"> Sunshine Coast Council Noosa Council DSITI Chamber of Commerce Alliance Digital Sunshine Coast
		International Submarine Broadband Cable		
	Transport Infrastructure	<ul style="list-style-type: none"> North Coast Rail Upgrade Bruce Highway Upgrade Sunshine Coast Airport Expansion National Freight Corridor Integrated Transport Infrastructure Planning Influencing modal shift and commuter behaviour to alternate, smart solutions 	<ul style="list-style-type: none"> Noosa Transport Strategy 2016-2036. Sunshine Coast Active Transport Plan 2011-2031 Transport Coordination Plan for Queensland 2008-2018 Connecting SEQ 2031: An Integrated Regional Transport Plan for South East Queensland Bruce Highway Action Plan DILGP State Infrastructure Plan Infrastructure Australia Plan 2016 	<ul style="list-style-type: none"> Sunshine Coast Business Council DTMR Sunshine Coast Council Noosa Council Federal, State, and Local MPs Sunshine Coast industry Infrastructure Australia
Innovation	Entrepreneurship capacity building	Entrepreneurial Ecosystem	<ul style="list-style-type: none"> Advance Queensland National Innovation and Science Agenda Sunshine Coast Council Regional Economic Development Strategy Noosa Council Local Economic Plan Youth Employment Strategy DSITI Mapping Digital Infrastructure Project 	<ul style="list-style-type: none"> The Innovation Centre SPARK Bureau Noosa Boardroom TAFE QLD East Coast Mountain Creek State High School DET Sunshine Coast Council Noosa Council Silicon Coast
		Start-up Business High School Curriculum		
		Coding & Programming Curriculum		
	Innovation	Advancing Regional Innovation Program	<ul style="list-style-type: none"> Advance Queensland 	<ul style="list-style-type: none"> DSITI Sunshine Coast Council Noosa Council Industry DSC USC

Appendix 4: Fast Facts



(a) Total used to derive percentages includes inadequately described and not stated responses. Source: ABS, Census of Population and Housing, 2011, Basic Community Profile - B43 (usual residence) Figure 1: Employment by Industry Source: QGSO (2017a) Queensland Regional Profiles: Resident Series Profile for Sunshine Coast & Noosa region



(a) Based on a 4-quarter smoothed series. Source: Australian Government Department of Employment, Small Area Labour Markets Australia, various editions

Figure 4: Sunshine Coast Unemployment compared to Queensland Source: QGSO (2017a) Queensland Regional Profiles: Resident Series Profile for Sunshine Coast & Noosa region.

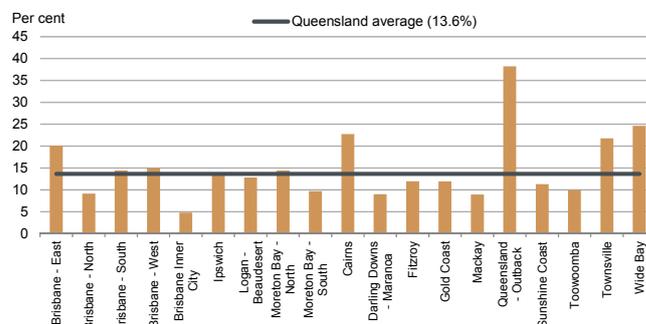


Figure 5: Youth unemployment Based on 12-month moving average. February 2016 (8.4%), February 2017 (11.3%). Youth refers to persons 15 to 24 years. Source: QGSO (2017c) Regional Youth Unemployment February 2017

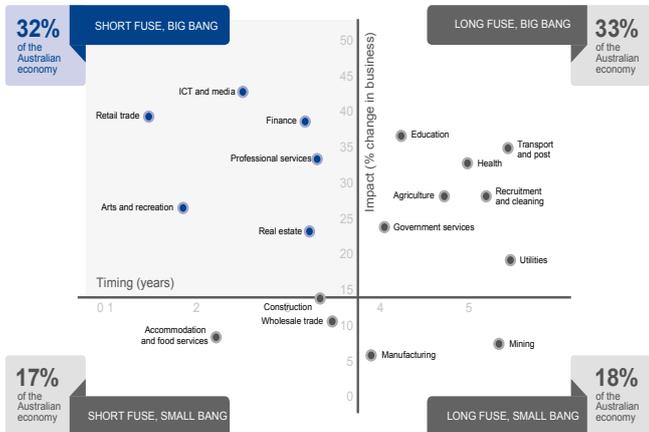


Figure 2: Digital Disruption Source: Deloitte Access Economics (2012, p.9) Digital disruption. Short fuse, big bang?, Building the Lucky Country #2, p.9

POPULATION CHANGE				
	2001	2006	2011	2016
Share of Population				
Age 0-19	19.2%	17.9%	18.0%	18.5%
Age 20-29	19.5%	20.4%	20.4%	16.9%
Age 30-54	40.2%	40.4%	39.9%	41.8%
Age 55+	21.2%	21.3%	21.7%	22.8%
Population Change (average between years)				
Age 0-19		573 2	,224 3	,443
Age 20-29	3	,127 2	,450 -	1,981
Age 30-54	4	,559 4	,120 8	,888
Age 55+	2	,490 3	,024 4	,982
Average Annual Growth	1	.9%	1.9% 2	.2%

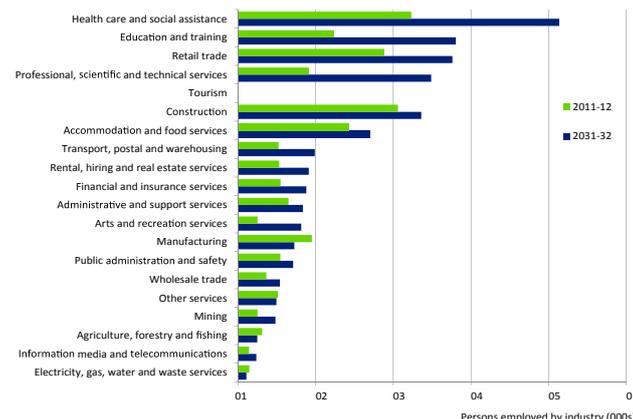


Figure 3: Industry structure of employment in Sunshine Coast region 2011-12 and 2031-32 Source: Deloitte Access Economics (2013, pii) Workforce Planning Research for the Sunshine Coast and Moreton Bay Council Regions

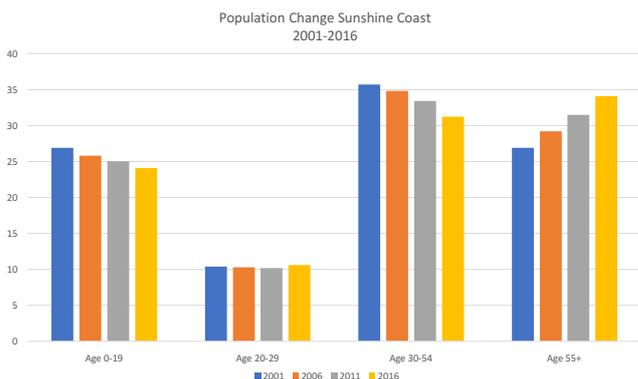


Fig 6 & 7 Source: NIEIR (2016a, p.167) State of the regions 2016-17 - Appendix 1 Regional Indicators.

RDA Sunshine Coast 2016-17 Regional Roadmap Update



Our vision is a Sunshine Coast that is innovative, dynamic, connected and sustainable.
Our mission is to connect people from within our region and across other regions to strengthen business growth, generate innovative sustainable solutions and enhance economic development.

OUR PRIORITIES

SUPPORTING THE REGION'S ECONOMIC PROSPERITY

Nurture high potential economic development opportunities, initiatives and industries towards global competitiveness and support major projects that will have far reaching benefits across the Sunshine Coast community. Priority economic development initiatives include:

<p>ECONOMIC DEVELOPMENT</p>	<p>SUPPORT ECONOMIC DEVELOPMENT PROGRAMS Support Noosa and Sunshine Coast Councils in the following high priority industries: Tourism, Sport and Leisure Clean Technologies Aviation & Aerospace Agribusiness</p> <p>Health & Wellbeing Knowledge Industries & Professional Services Education & Research</p>
<p>INNOVATION & ENTREPRENEURSHIP</p>	<p>NEAR & MID-TERM PROJECT OPPORTUNITIES Lead and implement the Digital Sunshine Coast Action Plan Encourage businesses to adopt digital technologies to improve the performance and competitiveness of their business processes Support startup entrepreneurs and established businesses seeking to commercialise ideas for new products, new services and/or new business models</p>

<p>SOCIAL</p>	<p>YOUTH EDUCATION & EMPLOYMENT INITIATIVES Lead and support education pathways that create employment for youth</p>
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DEVELOPING THE REGION'S CORE INFRASTRUCTURE

Provide evidence-based support for key infrastructure projects that will enhance investor confidence and generate long-term benefits. Advocate for public, private and multi-party investment opportunities and influence policy that will positively affect economic, social and environmental outcomes.

	<p>SUPPORT REGIONAL INFRASTRUCTURE DEVELOPMENT Promote the Building Better Regions Fund (BBRF) and support applicants seeking to submit competitive funding applications</p>
	<p>STRENGTHEN TRANSPORTATION INFRASTRUCTURE Participate in / advocate for regional transportation infrastructure planning and support key initiatives including: North Coast rail duplication Bruce Highway upgrade Sunshine Coast Airport expansion</p>
	<p>IMPROVE DIGITAL INFRASTRUCTURE Support the Sunshine Coast Council's International Submarine Broadband Cable initiative Advocate for faster broadband</p>
	<p>SUPPORT THE DEVELOPMENT OF 'SMART COMMUNITIES' Promote Maroochydore - The Bright City development</p>

OUR APPROACH

Deliver good governance and effective administration.

Collaborate with government, business and not-for-profits to strengthen regional prosperity.

Proactively monitor events and developments.

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