

# South East Queensland



## SEQ Overview

South East Queensland (SEQ) is full of natural attractions, from world renowned beaches and waterways to Australia's largest expanse of sub-tropical rainforest. Covering 35,248km<sup>2</sup> SEQ includes 12 LGAs that collectively form one of Australia's most desirable and fastest-growing regions, forecast to grow by over 50% by 2041.

 **SEQ Population Forecast**  
from 3.5M in 2016 to 5.3M by 2041



## SEQ Population

Queensland (QLD) population growth continues to be largely concentrated in SEQ. More than 7 in 10 Queenslanders, 72.5% or 3.7 million people live in SEQ. Over the 10 years to June 2019, SEQ grew at more than double the rate (2.0%) of the rest of QLD (0.7%). Gold Coast and Moreton Bay had the largest increases in their share of the QLD population, both up 0.7%. Ipswich had the third largest increase up 0.6%.

LGA Population	2012	2016	2019
Brisbane	1,110,473	1,131,155	1,253,982
Gold Coast	526,173	555,721	620,518
Sunshine Coast*	326,506	356,763	384,301
Redland	145,507	147,010	158,815
Moreton Bay	400,036	425,302	469,465
Logan	293,485	303,386	334,358
Ipswich	177,485	193,733	222,307
Lockyer Valley*	137,087	140,941	146,241
Somerset	22,584	24,597	26,219
Scenic Rim	37,826	40,072	43,123
<b>SEQ Total</b>	<b>3,177,162</b>	<b>3,318,680</b>	<b>3,659,329</b>

- Source: Aggregated ABS Population Statistics 2012-2019

# Economic Profile



## QLD's Economic Powerhouse

SEQ is Australia's third-largest capital city region by population, with a high performing regional economy generating almost two-thirds of the state's gross product. SEQ offers freight and air access to domestic and global markets and is home to Australia's fastest growing shipping port as well as four international and domestic airports.



**SEQ Gross Domestic Product \$170 Billion**

- SEQ Council of Mayors 2019



**SEQ City Deal Modelling \$58B Bigger Economy\***

- KPMG 2018: SEQ City Deal 2041

## SEQ Employment Growth



**1 Million New Jobs Over The Next 20 Years**



## SEQ's Diversified Industries

SEQ's regional economy has a diversified industrial structure with employment and economic activity driven across many industries. Most of QLD's key health, education and research clusters are in SEQ, nationally significant defence infrastructure supports an extensive industry supply chain, and SEQ's abundant agricultural land makes it one of Australia's premium food bowls (\$1.16B p.a.).

SEQ's top five industries are Health Care and Social Assistance, Retail Trade, Construction, Manufacturing, and Education and Training. SEQ's diverse economy supports approximately 1.65 million jobs and is expected to create an additional 1 million jobs by 2041. SEQ is growing at twice the OECD average and creating one in four of all new jobs in Australia, supporting more than 80% of QLD's employment in professional, financial and information sectors.

**“South East Queensland has strong relationships with surrounding regions and through its export orientation, liveability, biodiversity corridors and transport networks – the rest of Australia and the world.”**

- QLD Gov Shaping SEQ Regional Report 2017



**SEQ Budget**  
28,400 Jobs



**Infrastructure**  
\$9.67 Billion



**Health**  
\$18.19 Billion



**Education**  
\$1.09 Billion

- SEQ LGA Budget Data collated from the QLD Budget 20-21

# Commercial Development



## Brisbane Olympic Bid 2032

The International Olympic Committee (IOC) has chosen Brisbane as the preferred bidder for the 2032 Olympic and Paralympic Games. The \$4.5B games now allows a region, rather than a city, to host the event. SEQ has 85 per cent of the venues already built, which works in favour for the IOC as it moves towards a cost neutral event.

## Supporting 129,000 Jobs

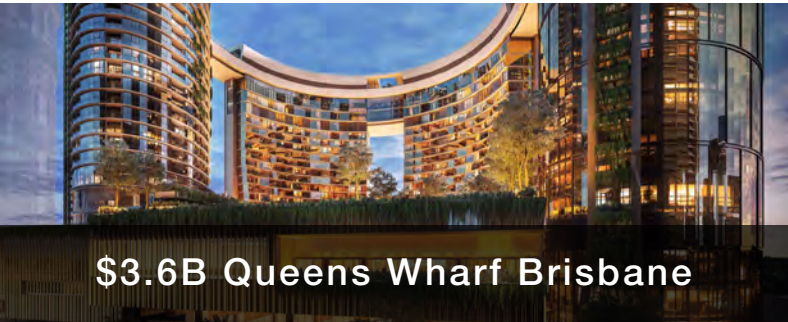
Tourism | Hospitality | Construction



**\$20 Billion**  
Tourism Uplift  
2021-2036



**\$8.6 Billion**  
Export Trade  
Opportunities



## \$3.6B Queens Wharf Brisbane

A new world-class integrated resort development is being constructed. The 26ha tourism, leisure and entertainment destination will feature a new casino, five new hotels with more than 1,000 guest rooms, around 50 restaurants and a major retail precinct. Once operational in 2022, it will support 8,000 jobs and attract 1.39M visitors each year.

## Investment in SEQ

Recent redevelopment of The Star Gold Coast is part of an existing \$850M transformation, separate to the \$2B+ approved masterplan. The Star Gold Coast masterplan provides a once-in-a-lifetime opportunity for SEQ. If delivered in full, the masterplan will increase the value of tourism investments across Queen's Wharf Brisbane, The Star Gold Coast and the Sheraton Grand Mirage to around \$9B.



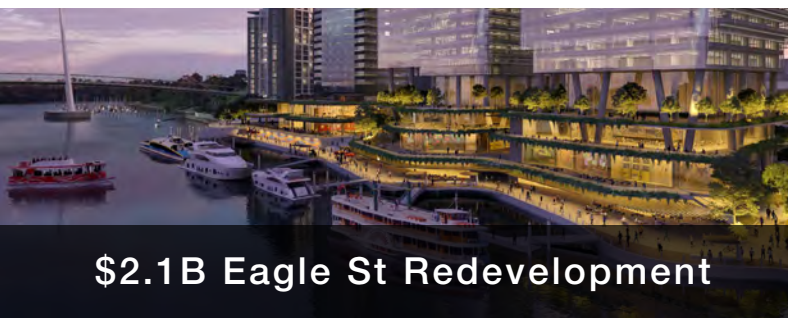
**\$4.35B**  
Gold Coast



**\$9B SEQ**  
Total Investment



**\$4.6B**  
Brisbane



## \$2.1B Eagle St Redevelopment

A transformation of the Eagle St Pier & Waterfront Place precinct into Brisbane's premium business and leisure destination has received development approval. The design incorporates 2 new towers, enhanced retail, large public plaza and more.



## SunCentral Maroochydore

The new vision for the Sunshine Coast CBD is now underway. Over the next 15-20yrs the \$2.1B project will deliver 160,000m<sup>2</sup> of commercial and retail space, 4,000 apartments, create 15,000 jobs and inject more than \$4.4B into the local economy.

# Infrastructure Investment



## Cross River Rail Project

The new 10.2km rail line will include 5.9km of twin tunnels under the Brisbane River and CBD. The project will unlock the bottleneck at the core of the SEQ rail network, allowing more trains to run more often and integrating with new roads and the new Brisbane Metro busway to enable a turn-up-and-go transport system for the region.



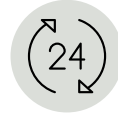
**\$5.4 Billion**  
Rail Project Cost



**7,700**  
Construction Jobs



**10.2km**  
New Rail Line



**2024**  
Operational



## SEQ City Deal

All three levels of Government committed to a 20 year vision in 2019, by co-signing the SEQ City Deal Statement of Intent. Through the City Deal, government can make strategic transport and digital infrastructure investments with the objective of transforming regional connectivity to support a 45min region and 30min cities in SEQ.

## International Submarine Cable

Queensland's first direct international data and telecommunications connection to global markets is now in service on the Sunshine Coast. Queensland businesses will, for the first time, be able to bypass Sydney and connect direct internationally. The project will help stimulate local business, generate new investment and improve telecommunications diversity to Australia's east coast.



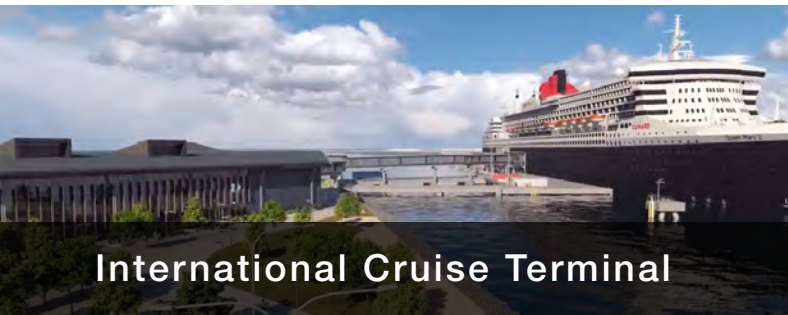
**864**  
New Jobs



**\$927M**  
Future Investment



**550km**  
Cable



## International Cruise Terminal

Brisbane's new \$177M Cruise Terminal is a vital pillar for SEQ's tourism economy. Within 20 years, it will potentially triple Brisbane's cruise industry to support 3,750 jobs, bring over 760,000 visitors annually and contribute \$1.3B in net expenditure.



## New Brisbane Airport Runway

Brisbane Airport plays a catalytic role in tourism, business and industry growth. Since FY12, more than \$1.7B has been invested in infrastructure. In 2020 the new \$1.1B runway opened; set to create 7,800 jobs and \$5B p.a. economic benefit by 2035.

# Brisbane North



## Overview

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The Moreton Bay Region spans 2,037sqkm and is the key northern growth corridor of Brisbane. The region provides a balance between business and lifestyle, with laid back beaches and bays to pristine rainforest and hinterland. Situated just 30min from Brisbane CBD, the region also has easy access to major transport and export infrastructure; the Brisbane and Sunshine Coast Airports, Port of Brisbane, Bruce Highway and Redcliffe Peninsula Line. Major centres include Strathpine, Redcliffe and Caboolture.



### Population 2019

469,465

(2019 ABS ERP)

### Population Growth

24.2%

(2011-19 ABS ERP)

### Population 2041

700,000

(MBRC REDS 2020 Projected Population)

### Projected Growth

49.1%

(Estimated Population Increase 2019-2041)

## Population

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The Moreton Bay Region is the third largest LGA by population size in both QLD and Australia. Over the year to 30 June 2019, the region experienced the third largest population increase in QLD. Its population has been steadily increasing for over a decade, from approx 325,000 in 2006, to 469,465 in 2019. This trend is predicted to continue with a forecasted population of 534,000 in 2026 and 645,000 by 2036, a growth of approx 40 percent.

“The **Moreton Bay Region** is well **positioned** for **future growth**. Our combined **lifestyle** and **affordability** have driven considerable **population growth** over the last decade, making it one of the **fastest growing regions** in Australia”

- Moreton Bay Regional Council REDS & ABS 2020

# Economy



## Economy

The Moreton Bay Regional Council has taken action to future proof the region. The Regional Economic Development Strategy 2020-41 (REDS), provides the blueprint for Council, industry and the business community to collaboratively build a \$40B economy by generating 100,000 new jobs and attracting 16,000 new businesses by 2041.



**Gross Regional Product**  
**\$17.72 Billion** (NIEIR 2020)



**Doubled Economy 2041**  
**\$40 Billion** (REDS 2020-41)

## Local Employment Growth



**16,000 New Businesses**  
**100,000 New Jobs 2041**



The region's ideal location, coupled with competitively priced residential and commercial premises and land, underpin its strong economic performance and have attracted numerous new residents, a highly-skilled workforce and more than 29,000 businesses. The region already supports 139,819 local jobs and with population growth likely to continue, so will many of the associated industries including construction, retail trade, healthcare and education.

## New Economic Direction

Over the next 20 years the Moreton Bay Region could become a top 10 Australian regional knowledge and innovation hub. Council's new REDS plan aims to reduce reliance on population-driven industries and focus on high value-adding industries, exports, and innovation. Creating this future economy will provide for greater levels of sustainability and build wealth for residents.

## MBR Council Budget 2020-21

The MBR Council 20-21 Budget provides record investment at an increase of \$30M more than last year. The budget focuses on driving the regions economic recovery. Council is increasing its commitments across all areas of delivery, with a strategic focus on awarding Council contracts to local businesses. The \$685M budget will directly employ at least 130 people and the \$220M capital works program will support 3,000 jobs.



**Budget 20-21**  
**\$685 Million**



**Capital Works**  
**\$220 Million**

- \$143.3M: Road & transport networks
- \$106.8M: Sport, rec, parks & environment
- \$18.4M: Waterways & coastal areas
- \$19.3M: Libraries, arts & history

# Economic Development



## Peninsula Rail Corridor

The Redcliffe Peninsula Line opened in 2016, including 12.6km of dual track passenger rail between Petrie and Kippa Ring. The rail line has not only created a vital transport link for the region, it has been a catalyst for growth and development, generating a range of investment opportunities in the 10 major corridor precincts.



**\$1.2 Billion**  
Rail Project Cost



**2,000 p.a.**  
New Residents



**50,000**  
Job Forecast 2036



**2.25% p.a.**  
Population Growth



## North Harbour Marina PDA

The 570ha North Harbour Precinct in Burpengary East received bipartisan support to be declared a PDA following the state election on 31 Oct 2020. The \$2.74B marina, residential and recreation precinct could create an estimated 7,735 jobs and is projected to inject a massive \$707M into the Moreton Bay Region every year.

## The Mill at Moreton Bay PDA

The Mill Priority Development Area (PDA) includes the Petrie Town Centre, Petrie Rail Station and the new University of the Sunshine Coast Campus at its core. The 460ha mixed use and redevelopment project has been earmarked to build a tech and innovation hub twice the size of Brisbane's CBD; making it the largest greenfield innovation precinct in Australia.



**8,600**  
Ongoing Jobs



**\$813M p.a.**  
Contribution



**2036**  
Completion



## Foreshore Masterplan

The \$1B Scarborough Harbour Redevelopment unlocks opportunities for significant economic and tourism growth, whilst creating the potential to be a key hub for Australia's \$74B marine industry.



## SEQ Northern Freight Terminal

The QLD Gov has plans for a future intermodal facility north of Caboolture; creating potential for new direct and indirect jobs as well as a catalyst for commercial and industrial growth.

# Commercial Development



## Caboolture West Masterplan

Caboolture West is set to be bigger than regional centres like Maryborough and Gladstone as it's developed into a \$9.5B mini city over the next 30 years. Plans to build a new shopping centre precinct have been lodged which includes a Woolworths supermarket, kiosk, BWS, gym, health care services and office space.

**Caboolture West**  
**\$9.5B | Mini-City | 3,480ha**



**17,000**  
**Future Jobs**  
 supported by  
 employment hub



**26,900**  
**New Homes**  
 for 68,700  
 new residents



## Newport Masterplan

The \$590M Stockland Newport Masterplan spans over 1.46ha and is projected to create 467 jobs during construction and 150 ongoing jobs. The new \$30M retail hub 'Newport Marketplace' will start construction in 2021. The centre will feature multiple retail tenancies, cafes, gym, a medical centre, supermarket and a community club.

## Laguna North Lakes

The \$250M Laguna mixed-use development is a 1.7ha precinct delivering 10,500m<sup>2</sup> commercial space, 2,000m<sup>2</sup> health and wellness, 5,000m<sup>2</sup>, fashion and food retailers, 3,000m<sup>2</sup> 'resort-style' restaurant and bar and a public aquatic centre.

## North Lakes Retail

Westfield North Lakes is already home to some of the biggest retailers all under one roof; Ikea, Myer, Big W, Dan Murphy's and Target. North Lakes boasts over 12.1M centre visits each year with a total trade area retail spend est. at \$5.6B.



### Retail & Commercial

- Caboolture Bunnings Warehouse: \$32M, 17,305m<sup>2</sup>, 150 ongoing jobs, 2022
- SunGATE Business Park: \$80M approved shopping centre, pub, fuel station
- Burpengary Station Village: \$40M, IGA, 5900m<sup>2</sup> retail, 200 ongoing jobs, 2021
- Murrumba Village: \$45M, food, restaurants, medical, beauty, Caltex, 2021
- Narangba Heights Shopping Centre: Coles, restaurants, retail, 100 ongoing jobs



### Industrial Precincts

- Caboolture Corporate Park East: \$90M, 40ha, Stage 2 & 3 completion 2020
- Brendale New Base Business Park: \$152.6M, 85ha, 107 lots, supports 567 jobs
- Caboolture NorthLink Industrial Estate: Value of \$300M, 115ha, 2006 to 2020
- Narangba Innovation Precinct: major regional enterprise & industrial precinct, significant economic contributor, caters to large scale hard-to-locate industries



# Transport



## Bribie Island Road Upgrade

The TRM's 20-year vision is to upgrade the road to provide a 4-lane, median-divided cross section for the length of the corridor. This includes a new 4-lane Bribie Island bridge. The \$30.4M Caboolture-Bribie Island Rd and Old Toorbul Point Rd intersection is the first upgrade to be delivered by mid-2021.



## Gateway Mwy & Bruce Hwy

The TMR has started integrated planning for \$2.1B in upgrades along the Gateway Mwy and Bruce Hwy from North Brisbane to Moreton Bay Region, in preparation for the increase in traffic levels expected along this major road corridor.

Business cases finalised in 2023 will encompass:

- Gateway Mwy: Bracken Ridge to Pine River
- Bruce Hwy: Gateway Mwy to Dohles Rocks Rd
- Gympie Arterial: Strathpine Rd to Gateway Mwy
- Northern Connection Ramps: Dohles Rocks Rd

## Sunshine Coast Airport Expansion Project



**\$334 Million**  
New Runway  
Opened 2020

**2,230 Jobs**  
New Full-Time  
Jobs by 2040



## Bruce Hwy Upgrade Program

The Bruce Highway is a vital artery for QLD and a nationally-significant freight corridor. That is why the QLD Government, together with the Australian Government, is delivering the 15-year, \$12.6 Billion Bruce Highway Upgrade Program.

- \$662.5 Million Caboolture-Bribie Island Road to Steve Irwin Way (Exit 163), due early 2023.
- \$163.3 Million Deception Bay Road interchange at Burpengary, due early 2023.
- \$932 Million Caloundra Road to the Sunshine Motorway on the Sunshine Coast, due 2021.

## Gateway Upgrade North

The Federal and QLD Government's have jointly funded the Gateway Upgrade North Project which includes a newly-widened section between Nudgee and Deagon, with additional pavement and safety works through to Bracken Ridge.



**\$1.1 Billion**  
Total Investment



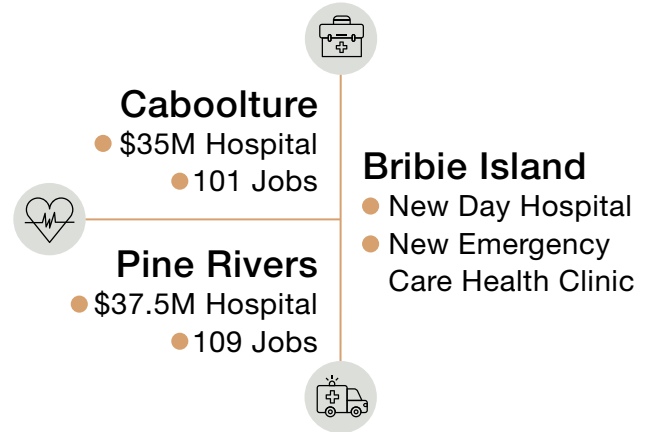
**6 Lanes**  
Completed 2019

# Medical



## New Satellite Hospitals

The Queensland Government is investing \$265 million to deliver seven new innovative Satellite Hospitals to help take the pressure off emergency departments and provide hospital care closer to home. This includes three new hospitals in the Moreton Bay Region; Pine Rivers (Petrie/Strathpine area), Caboolture and Bribie Island.



## Redcliffe Hospital Expansion

The QLD Gov has allocated \$29.3M in 2020-21 out of a \$129.9M total spend for construction projects to improve facilities at the Redcliffe Hospital site, including a new 1,100 multi-storey carpark. The major expansion will increase capacity by delivering more inpatient beds, additional surgery capacity, and expanded services for the local community.

## Caboolture Hospital Upgrade

Caboolture Hospital is undergoing a major expansion and redevelopment to build a bigger and better hospital with more health services for the community. By 2023, the \$394.6M project will deliver a new Clinical Services Building, 130 new beds, refurbished spaces, expanded health services and a new multi-storey carpark.

*“The Clinical Services Building will house a new much-larger Emergency Department and see more beds available across a range of services including rehabilitation, geriatric evaluation, medical, palliative, intensive and cardiac care.”*

- Caboolture Hospital Executive Director Dr Lance Le Ray

	<h3>Private Hospitals</h3>	<ul style="list-style-type: none"> <li><b>Caboolture:</b> 43 beds, 3 operating theatres &amp; 12 chair day procedure unit</li> <li><b>Peninsula:</b> 70 beds, medical, surgical &amp; rehabilitation healthcare services</li> <li><b>Pine Rivers:</b> a wide range of inpatient &amp; outpatient mental health services</li> </ul>
	<h3>Day Hospitals</h3>	<ul style="list-style-type: none"> <li><b>Moreton:</b> state-of-the-art surgical facilities, specialists &amp; large GP practice</li> <li><b>Montserrat North Lakes:</b> 986 square metre facility, 3 state-of-the-art operating theatres, 4 oncology chairs, 4 specialist suites &amp; 30+ specialists</li> </ul>
	<h3>Health Precincts</h3>	<ul style="list-style-type: none"> <li><b>North Lakes Health Precinct:</b> one of the regions largest health centres</li> <li><b>New Deception Bay Health Hub:</b> approved to deliver centralised healthcare including dentistry, physiotherapy, a GP clinic &amp; indoor swimming school</li> </ul>

# Education



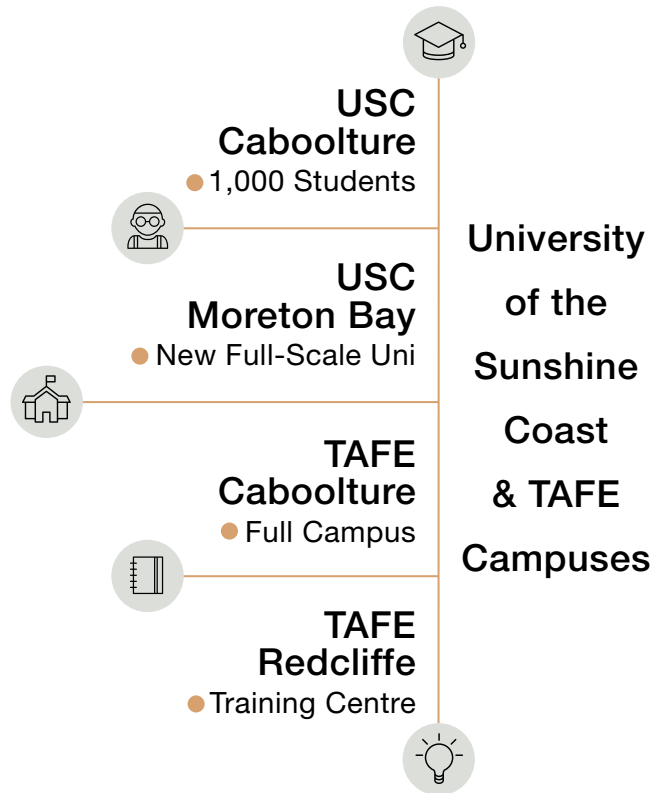
## The Mill Education Precinct

The University of the Sunshine Coast (USC) in Petrie, opened in 2020 as the first full-service university campus ever built in the region. The completed foundation building is the first stage in a planned 10.5ha university precinct that will form the heart of The Mill at Moreton Bay, a vibrant civic, cultural and educational precinct.



### USC at The Mill Moreton Bay

This new destination will offer world-class study opportunities for residents in the region. By 2030, it is expected USC Moreton Bay will cater for up to 10,000 university students with a comprehensive offering of courses including law, business, science, engineering and many specialty courses such as mechatronics.



## Future North Lakes TAFE

Funding has been committed for a \$40M North Lakes SkillsTech TAFE campus. The trades training centre will provide industry standard skills for the electrotechnology, construction, engineering and automotive industries.



### Completed School Facilities

- New Lee Street Special School: opened 2020
- Griffin State School: \$20M expansion in 2020
- 2020 Ready Program: additional infrastructure for Caboolture High, North Lakes College, Murrumba Secondary & Bribie Island State High



### New School Facilities

- New Narangba Prep School: completion 2025
- Mango Hill State Secondary: expansion 2022
- Lee Street Special School: expansion 2022
- New & Refurbished Facilities: Primary - Lawnton, Kallangur & Mango Hill, High - Morayfield, 2021

# Sport & Recreation



## A Region Rich in Diversity

From the salty sea air by the bayside at Redcliffe to the lush rainforest greens of the D'Aguiar range, Moreton Bay Region is an area rich with diversity. Get an adrenaline rush from the air, discover swimming holes and waterfalls, soak up the sun on pristine beaches, experience world-class events or feast on fresh local produce.



## Heritage Park Precinct

The North Harbour Heritage Park is designed as a community attraction, combining its rich history with a vast expanse of parkland. Locals and visitors can enjoy a slice of Queensland history and the Caboolture River as well as walking and bike trails, mountain bike trail, BBQ and picnic shelters, a fishing platform and canoe launch.

### New Waterpark

- \$11.5M at The Mill
- The Regions 1st



### \$240,000 Campaign

- 'Minutes Away'
- Attracting Driver Market Tourism



### Future Aquarium

- Art Gallery & Green Space
- Scarborough Project



## Sport & Recreation Budget

The 2020-21 Moreton Bay Regional Council Budget has a strong focus on healthy and active lifestyles with \$50M for parks and the environment and \$49M for sport and recreation, an increased of more than 40 per cent, up from \$34.1M in the 2019-20 Budget.

- \$8.5M for the Griffin Sports Complex
- \$1.4M for a new BMX precinct at Nolan Park
- \$5.5M for reconfiguration & upgrades to Les Hughes Sports Complex
- \$3.6M for a new clubhouse, tennis courts & carpark upgrade at Harris Ave Sports Complex
- \$11M to extend of the indoor sports centre at the South Pine Sports Complex



## South Pine Sporting Complex

The Brisbane Roar Women will be based at a brand new \$18M Women's Centre of Excellence and Youth Academy at SPSC. The investment will come just in time for the 2023 FIFA Women's World Cup and could be an Olympic venue.



## Dolphin Stadium Upgrade

Dolphin Stadium's final grandstand opened in 2020. The \$24M expansion has created a full capacity of 11,500 patrons, attracted Brisbane Roar to make it their new home and is now a showpiece for the Redcliffe Dolphins bid to be the NRL's 17th team.