I am delighted as the Chair of Regional Development Australia (RDA) Moreton Bay, along with my fellow committee members, to present the RDA Moreton Bay Regional Roadmap 2017-18.

This is an interim document at a time of change, as nationally, the Regional Development Australia network transitions to a new Charter, and new committees from 1st January, 2018.

The Moreton Bay region continues to be one of the fastest growing regions by population and economy in Australia, creating significant opportunities for regional and economic development.

This document brings together a collaborative approach across government, business and the community to ensure that the regions residents and businesses benefit from this growth.

The Mill at Moreton Bay is the key infrastructure project highlighted in this document. The university component will open during 2020 and by 2030 will provide a world class educational environment for 10,000 students. The site development is expected to create 4,000 FTEs once completed. This RDA initiated the process with investment in the Tertiary Education Strategy, which was the precursor to the site acquisition by Council.

The following five economic development priorities outlined in this document, reflect a focus on collaboration, business development, investment, innovation, education, entrepreneurship and tourism as the key drivers to create higher levels of employment required by the region’s growing population:

1. Regional Leadership
2. Catalytic Economic Infrastructure & Investment Attraction
3. Building Better Businesses
4. Education
5. Tourism & Events.

Complementary to my role as RDA Chair, I have successfully established Moreton Bay Region Industry & Tourism (MBRIT) as the regions destination management, tourism and events organisation.

I am looking forward to working with the Department of Infrastructure & Regional Development to embrace the new RDA Charter and to ensure the organisation continues to play a key role in the economic development of the Moreton Bay region.

Shane Newcombe
Chair
Regional Development Australia Moreton Bay Inc
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FREQUENTLY USED ABBREVIATIONS

MBRC: Moreton Bay Regional Council
RDA: Regional Development Australia
RDA MB: Regional Development Australia Moreton Bay
MBRIT: Moreton Bay Region Industry & Tourism
CCIQ: Chamber of Commerce & Industry Queensland
EXECUTIVE SUMMARY

THE MORETON BAY REGION – AN EMERGING AND GROWING REGION

Regional Development Australia (RDA) Moreton Bay covers the same geographic area as Moreton Bay Regional Council (MBRC) (Figure 1) which was formed during March 2008 through the amalgamation of the three former local government areas (LGAs) of Pine Rivers, Caboolture and Redcliffe. The region is home to a diverse range of settlements ranging from rural, urban and bay-side communities, each with its own characteristics and strong sense of identity.

Figure 1 – Map of the Moreton Bay Region
(Source: MBRC)
The Moreton Bay region is strategically located in South East Queensland to the north of the Brisbane CBD with direct access to nationally and internationally recognised export infrastructure, including the Port of Brisbane, the Australian Trade Coast and Brisbane Domestic and International Airports, enabling businesses to access both domestic and international markets with ease. The Bruce Highway is the key road corridor and the region is serviced by the Brisbane to Caboolture rail line, which extends north through the Sunshine Coast. The $1.1B Moreton Bay Rail Link was completed during 2016 and significantly improves public transport connections within the region, from Kippa-Ring and in to Brisbane and north to the Sunshine Coast.

The region’s economy is diverse and is dominated by small business with 60% being sole traders and 96% employing 19 or fewer employees.

The SEQ RDA Smart Work Hubs report (January 2015) identified that over 74,984 residents travel into Brisbane to work each day, which places significant strain on already stretched infrastructure. Congestion at peak times and increased travel costs, and commuting time are impacting significantly on the sustainable growth of the region and the quality of life and liveability for which the region prides itself. The use of digital technologies can be used to change travel to work patterns through teleworking, SMART Work Centres and flexible work patterns. The region also needs to focus on creating a broader range of employment opportunities to support the needs and aspirations of its residents.

Queensland University of Technology (QUT) has a small co-located campus with TAFE at Caboolture. The university component on this site will be operated by the University of the Sunshine Coast from January, 2018.

The majority of tertiary, VET and trade-based students need to travel outside of the region to access courses, mainly to Brisbane and the Sunshine Coast.

In response, Moreton Bay Regional Council following the completion of the regions Tertiary Education Strategy purchased the Mill at Moreton Bay site and has entered into a partnership with the University of the Sunshine Coast to develop a university campus. This campus will open during 2020 and by 2030 will provide a campus for up to 10,000 students.

The Moreton Bay region is one of the fastest growing economies and populations in Australia and will continue to be the third largest local government area by population in Australia behind Brisbane and the Gold Coast. Consequently, the regional economic development priorities reflect the challenges and opportunities associated with this growth, especially as the region is located adjacent to a state capital city – Brisbane.

It is this proximity to Brisbane which is also fuelling the region’s population growth as it is supporting employment growth in Brisbane.

Not all the employment growth predicted for Brisbane needs to be in Brisbane. The Moreton Bay region is a highly competitive and cost-effective location for business.

Figure 3 provides a brief SWOT analysis of the region’s economy:

<table>
<thead>
<tr>
<th>Moreton Bay Region – Quick Stats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geographic area</td>
</tr>
<tr>
<td>Population 2016/17</td>
</tr>
<tr>
<td>Population is higher than that of ACT &amp; NT</td>
</tr>
<tr>
<td>Estimated population 2031</td>
</tr>
<tr>
<td>Economy GRP</td>
</tr>
<tr>
<td>Employment</td>
</tr>
<tr>
<td>Key economic sectors</td>
</tr>
<tr>
<td>Key Business Locations</td>
</tr>
</tbody>
</table>
### Strengths
- One of the fastest growing regions in Australia – economically and by population
- Broad and diverse economic base
- Strategic location providing direct access to strategic export infrastructure – Brisbane International Airport and Port of Brisbane
- New University campus opening 2020
- Training and Education infrastructure
- 1800+ha of land for business use
- Significant and highly skilled workforce
- Strong and cost-effective business environment and location
- Lifestyle: a great lifestyle in a beautiful region
- Location of nationally and internationally renowned festivals and events
- National Broadband Network roll out across the region

### Challenges
- Sustainable population growth
- Funding infrastructure to match the needs of growing communities
- Community resilience
- Communities of double digit and long term unemployment
- Employment growth
- Travel to work patterns
- Economy dominated by small business
- Continue to build regional identity
- Proximity to Brisbane: restricting broader employment growth across professional services and government related employment
- Lack of knowledge based and creative economy employment & infrastructure

### Needs
- Regional jobs growth and diversity of employment
- Investment in tertiary education and training infrastructure
- Investment and funding to fully develop the Mill Site
- Infrastructure to support the needs of growing communities
- Public transport investment
- Further investment in innovation infrastructure, including centres to promote innovation and business acceleration.

### Opportunities
- The development of the Mill at Moreton Bay
- Economic diversification; growth of new and emerging sectors
- Growth of key employment sectors
- Innovation, entrepreneurship, collaboration and business cluster development
- Economic and business growth
- Attraction of professional and financial services businesses, including from the Brisbane CBD
- Employment, education, skilling and training
- Investment Attraction – logistics, high tech manufacturing, food and beverage and machinery and equipment manufacturing
- Digital technologies and innovation
- Telework and SMART Cities
- Enhancing quality of life, community diversity and resilience (community wellbeing)

---

Figure 3 – Regional SWOT Analysis of the Moreton Bay Region
The development of the Regional Roadmap, Vision for the Region, and associated regional economic development priorities have been developed within the context of the following global mega trends, pertinent national, state and regional policy. Within this context the Regional Economic Development Priorities and Key Actions are developed further on pages 5, 29-35.

### Global Mega Trends
- Digital disruption and technologically change
- Rapidly changing business models; new and emerging industries and employment patterns
- Growth in arificial intelligence
- Climate Change/Disaster Management
- Limited natural resources; changing consumption patterns; agricultural patterns
- Environmental, biodiversity and natural habitat decline (extinction)
- Economic shifts: west to east and north to south (Asian Century)
- Ageing and growing population
- Workforce mobility

### Commonwealth Government
- COAG Key determinants of long term regional economic growth: Human Capital; Sustainable (economic, environmental and social) communities and population growth; Access to international, national and regional markets; Comparative advantage and business competitiveness; Effective cross-sectoral and intergovernmental partnerships.
- Regions 2030 agenda focused on jobs and economic development; infrastructure; health; education and communications.
- Australia Regional Ministerial Taskforce.

### Qld Government
- Advance Queensland: suite of programs designed to create the knowledge based jobs of the future.
- Dept of State Development is developing a series of industry roadmaps as part of the Queensland Governments Advance Queensland program. The 10 year roadmaps and action plans cover: Advance Manufacturing; Aerospace; Biofutures; Biomedical and Life Sciences; Defence; Mining Equipment, Technology and Services.
- Queensland Infrastructure Plan

### Moreton Bay Region Priorities
- Moreton Bay Regional Council’s Planning Scheme
- MBRC Community Plan
- Mill Moreton Bay Priority Development Area
- Sustainable population growth
- Infrastructure investment
- Regional employment growth and travel to work patterns
- Lack of regionally significant tertiary education and training infrastructure
- Quality of life/environmental sustainability
- Business confidence to support growth; new investment and emerging industries
- SMART Cities / Digital driven change
- Areas of continued high unemployment
- Community well-being
- Transport and Logistics.

---

Figure 4 – International, National, State and Regional Society Trends and Policies Affecting the Moreton Bay Region
The key regional economic development priorities to be taken forward within this Regional Roadmap are detailed below:

**A VISION FOR THE REGION**

The Regional Development Australia (RDA) Moreton Bay vision for the Moreton Bay region is:

“The Moreton Bay region provides the balance of lifestyle and business opportunities in South East Queensland”

This statement reflects a future-focused and sustainable region, which can meet the aspirations and needs of a rapidly growing population, and also of a region attractive to investment and future-focused to take advantage of economic, social, technological and environmental change. This vision reflects a long-term aspiration for the region which is beyond the timeframe of this document.

**ROLE OF REGIONAL DEVELOPMENT AUSTRALIA**

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

RDA Committees have an active and facilitative role in their communities and a clear focus on growing strong and confident regional economies that harness their competitive advantages, seize on economic opportunity and attract investment.

**RDA Charter**

1. Collaborate with relevant stakeholders to identify economic opportunities and leverage private and public-sector investment to the regions;
2. Connect regional businesses, councils and industry sectors with international trade partners, financial markets and potential investors;
3. Promote and disseminate information on Australian Government policies and grant programs to state and local governments and industry, business and community sectors;
4. Support community stakeholders to develop project proposals to access funding;
5. Develop and maintain positive working relationships with the local government bodies in their regions;
6. Facilitate public and private sector decentralisation;
7. Assist in the delivery of Australian Government programs, where relevant and where requested by the Minister;
8. Engage with regional entrepreneurs and emerging business leaders to explore new opportunities to grow local jobs in their regions;
9. Provide information on their region’s activities and competitive advantages to all levels of government, industry, business and community sectors; and
10. Provide evidence-based advice to the Australian Government on critical regional development issues positively and negatively affecting their regions.
OVERVIEW OF THE REGION

The region is over 2,037 square kilometres and has an estimated current resident population of 437,751 as at May, 2017 (Remplan economy).

The Moreton Bay region is now the third largest local government in Australia based on population behind Brisbane City Council and the Gold Coast City Council.

Based on these medium series projections at June 2011, the population is projected to grow to 585,000 by 2031, creating further opportunities and challenges. It has undergone significant growth in recent years, benefiting from a surge in population.

Population growth is now placing significant pressure on existing infrastructure.

The Moreton Bay region is located in South-East Queensland, between 20 and 50+ kilometres north of the Brisbane CBD. It is bounded by the Sunshine Coast Regional Council area in the north, the Coral Sea and Moreton Bay in the east, Brisbane City in the south and the Somerset Regional Council area in the west.

The region is home to a diverse range of settlements ranging from rural, urban and bay-side communities, each with its own characteristics and strong sense of identity. The region’s natural assets include mountain ranges, water supply catchments, coastal wetlands, national parks, state forests, rural townships and urban centres. Rural land is used mainly for dairy farming, timber, beef cattle, mixed farming and tropical fruit growing.

Major natural features of the area include Bribie Island, Bribie Island National Park, D’Aguilar National Park, Freshwater National Park, Glass House Mountains National Park, the Pumicestone Channel, Pumicestone Passage Marine Park, several beaches and various wineries and vineyards.

The Region is served by the Bruce Highway, the D’Aguilar Highway, Brisbane-Caboolture and Moreton Bay railway lines.

The region provides a high quality of life and environment, which is making it increasingly attractive to residents and visitors alike.

The region provides a beautiful and varied hinterland with a host of village splendour, including Samford, Woodford, and the historic Dayboro. The coastal communities of Beachmere, Bribie Island, Deception Bay and Redcliffe provide a range of opportunities for residents and visitors, including major events, beaches and water sports.

The Moreton Bay region hosts a number of major events, which attract significant numbers of regional, interstate and international visitors providing significant economic benefits and opportunities. For further detail refer to pages 16-17.

There are opportunities for residents and visitors from arts & culture, beaches & foreshores, estuaries, cycle & walking tracks, history and heritage, jetties & marinas, markets, parks & gardens and water sports. The Moreton Bay region is also home to abundant wildlife and nature reserves, many providing key breeding grounds.

Owing to its unique environmental assets, a key element of this region’s growth management should be focused on environmental management and sustainability.
We have operated our business, Springers Solar, for over 10 years in Strathpine in the Moreton Bay region. Running a business in the region offers so many benefits including a strategic location, diverse customer base, and access to key infrastructure, all of which have contributed to our business growing significantly to now be installing some of the largest grid connected residential solar panel systems in Queensland.

Cheryl Springer, Owner, Springers Solar and President of Pine Rivers Chamber of Commerce

The following is designed to provide a brief overview of the region’s infrastructure to support economic and community development.

Moreton Bay Region
Strategic Location and Infrastructure – Quick Stats

**Strategic Location**
- Road ▶ Bruce Highway M1; Gateway Motorway
- Air ▶ 20 minutes from Brisbane Airport; Caboolture & Redcliffe airstrips
- Port ▶ 40 minutes from the Port of Brisbane
- Rail ▶ Queensland rail passenger and freight services to Brisbane and the Sunshine Coast

**Infrastructure**
- Schools ▶ 94 schools (65 state, 29 non-state)
- VET ▶ Brisbane North Institute of TAFE (Caboolture and Redcliffe), Australian Trade College (Scarborough)
- Tertiary ▶ Queensland University of Technology (Caboolture); University of the Sunshine Coast (from 2020)

Strategically located to the north of the Brisbane CBD, the region provides direct access to Brisbane International & Domestic Airports, the Port of Brisbane and to the Australian Trade Coast enabling businesses to access both domestic and international markets with ease.

Road

The major transport spine through the region is the six-lane Bruce Highway M1 motorway, which is part of the east coast national highway network. The region is also serviced by the Gateway Motorway, a toll road which connects the region to parts of Brisbane, and South-East Queensland.

Air

The south of the Moreton Bay region is located just 20 minutes from the Brisbane Domestic and International Airport, which is investing $3.8bn over a decade redeveloping and expanding the airport, including a $1.35bn new parallel runway due for completion in 2020. The airport services 30 airlines flying to 50 domestic and 29 international destinations, in total more than 22.5m passengers travelled through the airport in 2016 (Brisbane Airport Corporation – August 2017). Municipal aerodromes at Caboolture and Redcliffe provide service to recreational and small commercial aircraft, as well as, aircraft-related support services, including pilot training.
Port

The Port of Brisbane, the third largest container port in Australia, and one of the country’s fastest growing, is just under 40 minutes from the Moreton Bay region accessed by the Gateway Motorway.

Rail

Queensland Rail operates a full timetable of passenger and freight rail connections within and beyond the region, with frequent express services to Brisbane and the Sunshine Coast.

Education Infrastructure

The Moreton Bay region has a total of 94 schools and colleges operating in the area, of which 65 are state schools and 29 non-state schools. Most of these school’s service the resident youth population for primary and secondary educational needs.

The region also supports tertiary and accredited vocational education through the major registered training providers (RTO’s), Brisbane North Institute of TAFE (Caboolture & Redcliffe Campuses), Australian Trade College and the Queensland University of Technology Caboolture campus.

Moreton Bay Regional Council is creating a new major precinct that will generate thousands of local higher education and employment opportunities for the region.

The Mill at Moreton Bay - with a full-scale University of the Sunshine Coast (USC) campus at its core, will offer world-class study opportunities to residents in the Moreton Bay Region.

USC Moreton Bay is on track for completion in 2020, supported by additional work, study and community facilities, and will cater for up to 10,000 university students in its first 10 years.

Several proximate major universities draw their students from the region, including the University of the Sunshine Coast and the Australian Catholic University located in Banyo.

The Mill at Moreton Bay will significantly reduce the need to travel outside of the region for a university education, making it more accessible and increasing participation rates across the region.

Telecommunications & the NBN Infrastructure

The Moreton Bay region provides access to broadband infrastructure, which will be significantly enhanced as the region is one of the first in Australia to benefit from the roll-out of the National Broadband Network (NBN). However, many communities across the region continue to experience poor broadband and mobile phone reception.

The NBN and other digital technologies present new opportunities for developing the region, including growing business, creating connected and inclusive communities, transforming work patterns through digital working, and reducing the impact on the region’s environment.

Research, Development & Innovation Infrastructure

Research, development and innovation infrastructure are critical components required to build a knowledge-intensive economy. The broader development of the Mill at Moreton Bay is essential to enable the region to be competitive in the knowledge based economy, and to support businesses to create the jobs of the future.

An increase in the region’s capacity to support business innovation, and R&D activity, through improved linkages with universities, public and private sector organisations, is also required to build a regional knowledge-intensive economy that supports business growth and resilience, creating a broader range of employment options for the region’s residents.

Figure 11 – QUT Caboolture Campus
(Source: www.qut.edu.au)

The Moreton Bay region’s proximity to Brisbane also allows for access to research facilities at the Australian Catholic University, the University of Queensland, QUT’s Brisbane campuses, Griffith University, Commonwealth Scientific and Industrial Research Organisation (CSIRO).
Competitive Location

The Moreton Bay region is one of the most competitive business regions in Australia. In summary, these advantages include:

- Strategically located in Brisbane’s northern growth corridor
- Rapidly growing region of opportunity
- Capital city convenience without capital city costs
- Proximity to major export infrastructure
- Ready availability of high quality, affordable industrial and commercial sites
- Existing industry clusters and associated supply chains
- Highly skilled workforce
- Fast and convenient access to world class road, rail, air, port and broadband connectivity
- Strong, diversified economy
- Unparalleled lifestyle opportunities.

"Prior to moving our business here, we investigated eight other areas in and around Brisbane. Frankly this area won hands down on all our criteria. Any business serious about their long-term future needs to put this area to the test. The fact is when they do; it will tick all the key boxes as it did for us."

Michael Kennedy, General Manager, Kennedy’s Aged Timbers

The following provide a competitive location benchmark for the region against the Australian Trade Coast, Melbourne and Sydney for land prices, commercial rents and access to a skilled workforce.

**Figure 12a – Comparison of Land Prices in the Moreton Bay with Capital Cities of Australia**  
(Source: AEC Group 2013)

<table>
<thead>
<tr>
<th>Area</th>
<th>Avg Industrial Land Costs ($/sqm)</th>
<th>Savings in Moreton Bay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moreton Bay</td>
<td>$220</td>
<td></td>
</tr>
<tr>
<td>Brisbane (Australia Trade Coast)</td>
<td>$320</td>
<td>31%</td>
</tr>
<tr>
<td>Melbourne</td>
<td>$253</td>
<td>13%</td>
</tr>
<tr>
<td>Sydney</td>
<td>$417</td>
<td>47%</td>
</tr>
</tbody>
</table>

**Figure 12b – Comparison of Commercial Rents in the Moreton Bay region with Capital Cities of Australia**  
(Source: AEC Group 2013)

<table>
<thead>
<tr>
<th>Area</th>
<th>Avg Commercial Rent ($/sqm)</th>
<th>Savings in Moreton Bay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moreton Bay</td>
<td>$367</td>
<td></td>
</tr>
<tr>
<td>Brisbane (Fringe)</td>
<td>$480</td>
<td>23%</td>
</tr>
<tr>
<td>Brisbane (CBD)</td>
<td>$689</td>
<td>47%</td>
</tr>
<tr>
<td>Melbourne (CBD)</td>
<td>$567</td>
<td>35%</td>
</tr>
<tr>
<td>Sydney (CBD)</td>
<td>$913</td>
<td>60%</td>
</tr>
</tbody>
</table>
The following is an example of the cost savings in ‘Labour, Payroll Tax and WorkCover’ for a regional Medical and Surgical Equipment Manufacturing Operation employing 50 people locating in Moreton Bay as opposed to Brisbane, Sydney and Melbourne.

<table>
<thead>
<tr>
<th></th>
<th>Brisbane</th>
<th>Sydney</th>
<th>Melbourne</th>
<th>Moreton Bay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll</td>
<td>$2,771,536</td>
<td>$2,879,446</td>
<td>$2,822,598</td>
<td>$2,452,699</td>
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<tr>
<td>Payroll Tax</td>
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<td>$19,379</td>
<td>$11,357</td>
<td>$64,253</td>
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<td>Workcover</td>
<td>$24,196</td>
<td>$52,953</td>
<td>$16,371</td>
<td>$21,412</td>
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<tr>
<td>Total</td>
<td>$2,875,130</td>
<td>$3,051,779</td>
<td>$2,950,326</td>
<td>$2,538,365</td>
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</tbody>
</table>

Savings in Moreton Bay ($): 336,765
Savings in Moreton Bay (%): 12


Figure 12d – Moreton Bay’s Competitive Cost Savings
(Source: AEC Group 2013)

**The ‘Game Changer’**

**The Mill at Moreton Bay**

Moreton Bay Regional Council is creating a thriving new major precinct that will generate thousands of local higher education and employment opportunities for the region.

With a full-scale University of the Sunshine Coast (USC) campus at its core, this new destination will offer world-class study opportunities to residents in the Moreton Bay Region. USC Moreton Bay is on track for completion in 2020, supported by additional work, study and community facilities, and will cater for up to 10,000 university students in its first 10 years.

The onsite train station will connect residents from right along the Redcliffe Peninsula Rail Line, and the Caboolture Line to the new Petrie campus. Regular bus services and car parking infrastructure will also be a key feature of the precinct to bring residents and business people from all over the region, reducing north and south traffic congestion.

On 2 September 2016, the Deputy Premier and Minister responsible for Economic Development Queensland declared The Mill at Moreton Bay as a Priority Development Area (PDA) covering 460ha, which will support its transformation into a world-class innovation and knowledge precinct.

The University of the Sunshine Coast (USC) has been selected to develop an exciting new university campus in the Moreton Bay Region. USC is a Queensland university and is ranked as one of Australia’s top universities for teaching quality.

For the 10th consecutive year, USC has received a five-star rating for teaching quality from the independently published Good Universities Guide. USC has also achieved higher than average participation rates for low socio-economic status students, proving to be a highly inclusive university provider.
USC will develop a major new university campus at Petrie which will be in equal status to its campus at Sippy Downs. The new campus will be called USC Moreton Bay.

USC Moreton Bay will have a comprehensive offering of courses including law, business, science, engineering and many specialty courses such as mechatronics.

It is expected this course offering will grow to more than 100 courses within 10 years of the campus' operation.

USC has a broad range of preparatory classes to assist people transition into university study including those people who may not finish Year 12, or have been in the workforce for some time and are returning to study.

Bernard Salt, one of Australia’s leading experts on demographics said: “the Moreton Bay Regional Council area is in my view the best location for a new university campus in Australia based on current and future demographics. A local, major higher-education campus will unlock job opportunities and supercharge this region's economic development and prosperity.”

With around 613,000 residents in the Greater Moreton Bay Region, it could sustain around 67,000 university students 18-24 year old’s in the Moreton Bay Region by 2031.

Bernard Salt, one of Australia's leading experts on demographics said: "the Moreton Bay Regional Council area is in my view the best location for a new university campus in Australia based on current and future demographics. A local, major higher-education campus will unlock job opportunities and supercharge this region's economic development and prosperity."

It is anticipated that the broader development will also provide:

- 10,000 university students by 2033 and 20,000 students at capacity
- Create over 2,200 ongoing jobs for the Greater Moreton Bay Region by 2031
- 100 direct construction jobs each year from 2016-30
- 250 additional ongoing jobs in the local education and health sector from 2031
- $950 million of economic benefit for the region.

Across the PDA area, the proposed Development Scheme includes:

- Mill Central - Full-service university campus, supported by mix of retail, commercial and community uses and a revitalised Petrie town centre
- Mill Innovation - Opportunities for innovative businesses or organisations wishing to co-locate with the university, stimulating economic growth and employment for the region.
- Mill Urban - Mix of residential development with high quality landscapes and streetscapes, creating a diverse community with exceptional amenities and access to one of SEQ’s most innovative centres of excellence.
- Mill Transit - New transit oriented residential community focused around Kallangur station.
- Mill Green - More than 200 hectares of conservation area and lakes will be protected, restored and managed, enhancing koala habitat and wildlife corridors on site.

It is anticipated that the broader development will also provide:

- 204,000m2 of commercial, retail, industry and mixed-use floor space
- 6,000+ ongoing jobs mostly in the knowledge based fields

### Major Projects

#### Pine Rivers Private Hospital

Funded by Department of Health, RDA Moreton Bay appointed Ernst & Young (EY) to undertake a two-phase process designed to secure private hospital investment on the site of the Mill at Moreton Bay.

The first phase comprised of a feasibility study for a private hospital, and the second phase comprised of a business case and information memorandum.

An outcome was the identified opportunity in the medium term (2020 onwards) to secure an investment to meet the growing demand for private health care provision in the region. This timeframe fits with the development framework for the wider Mill at Moreton Bay site.
Moreton Bay Rail Link Investment Attraction

MBRC in partnership with the Department of State Development has undertaken the development of an investment attraction strategy focused on the recently opened stations and surrounding precincts along the Moreton Bay Rail Line.

The focus is to maximise the economic benefit from this infrastructure and influence future investment opportunities as they relate to the five new rail stations.

The economic impact of the new rail line has been and will continue to be significant, creating significant employment and business opportunities for residents.

- Since January 2016, 39 new residential developments have been approved within the suburbs adjacent to the railway line, which will provide more than 1400 dwellings.
- 29 new retail, commercial, industry and community uses approved within the suburbs adjacent to the rail line.
- Since 2009, the number of registered businesses in the suburbs along the rail line has more than doubled from 1,574 to 3,340. (MBRC May 2017).

Caboolture West Master Planned Area

Caboolture West has been declared as a Master Planned Area and covers 6,413 hectares of land located west of Caboolture and Morayfield, bounded by the D’Aguilar Highway to the north, and Caboolture River Road to the south (Figure 15).

Caboolture West is recognised by the Queensland State Government as an Identified Growth Area which may accommodate significant population growth in the region in the long-term. It is expected that the area could house up to 60,000 people.

North Harbour

North Harbour has introduced a new destination into the Moreton Bay Region – one that will take shape over the next 15 years as part of the significant growth projected for the region.

North Harbour offers a unique residential development, which may also encompass a residential community based around a proposed marina with direct access to the Moreton Bay.

Figure 16: North Harbour Master Plan

Masterplan

The proposed marina village will be the focal point of North Harbour, along with planned sporting fields, 1000 acres of open space, schools and a business park.

The vision for North Harbour is to create one of the most vibrant marina hubs in Queensland and Australia. Based around a 300-berth world class marina, with associated marine industries, education and training facilities, this precinct provides a driver for economic growth and workforce development.

North Lakes

This award-winning master planned development continues to be a hot bed of both residential and economic growth. Recent investments have included IKEA, Costco, ALDI and Spotlight.

Beyond the construction phase, a significant number of investments in commercial and retail developments are creating valuable employment opportunities.

Major developments recently completed or underway, include:

- $75m Stage Two Primewest Homemaker Centre
- $25m North Lakes Sports Club
North Lakes Hotel (Open Late 2017)

$250m Laguna North Lakes by Pointcorp and the George Group, which will include retail and dining laneways, 140 room hotel, tavern and function space, aquatic centre, commercial office tower and public green space.

Upgrade of the Bruce Highway

The Commonwealth Government as part of the 2017 Budget and Regions 2030, announced funding of up to $6.7bn towards a major upgrade of the Bruce Highway. This will include an upgrade to a six-lane highway from Caboolture to the Sunshine Coast.

NBN Roll – Out

The NBN continues to be rolled out across the region. Most recently 4,500 premises went live across Redcliffe and Dayboro (MBRC Website, May, 2017).

Currently, 30,000 properties are under construction in suburbs such as North Lakes, Mango Hill, Narangba, Burpengary and Scarborough.

Mobile Blackspot Testing has been undertaken to identify areas of blackspot internet and mobile phone reception. This data has been used to bid for funding from the Commonwealth Government Mobile Black Spot Program.

South Pine Sports Complex

The South Pine Sports Complex is a regional sporting facility located in the southern area of the Moreton Bay Region.

The complex is well established and experiences a high level of use and is enjoyed by the local community and visitors to the area. Land acquisitions to the east and west of the existing complex have provided opportunity to expand the complex for sport and recreation purposes.

MBRC has developed a master plan for the sporting complex. This plan provides a coherent long-term vision for the future development of the site.

The master plan was developed through extensive consultation with existing and potential user groups and the general community.

The main attributes of the Master Plan expansion include:
• Expansion of the indoor sports complex
• 12 court regional tennis facility
• BMX precinct
• Expanded dog sports and agility area
• Senior AFL field with shared use clubhouse
• Expanded gymnastics area
• 6 new multipurpose fields
• Synthetic turf fields
• Croquet lawns
• Passive recreation areas
• Ecological restoration of the South Pine River riparian corridor
• Improved access and internal road connections
• Additional car parking
• Network of cycling and pedestrian pathways

Redcliffe Foreshore Master Plan and Activation Strategy

The Redcliffe peninsula has some of the region’s best open space. Few, if any, places exist with essentially 15 kilometres of continuous public access open space, parks and reserves adjoining Moreton Bay. The uniqueness of the spaces, access to the water and the natural beauty of Moreton Bay means that the peninsula’s foreshore public land is already in high demand for community uses.

What the scope of the project includes:

• Investigating activation of the foreshore to bring it in line with state and national competitors
• Identifying those parts of the foreshore suited to additional forms of activation and commercial use
• Identifying what areas along the foreshore could be used more actively

• Recognising that some spaces and parks are considered suitable for active events or larger functions, whilst some are best retained as quiet, landscaped areas for passive recreation and enjoyment
• Identifying a unified strategy for the whole peninsula foreshore and creating a network of precincts that deliver for the existing community and attract visitors
• Supporting and acknowledging the unique role of each space now and therefore the unique opportunities going forward
• Recognising that the sustainability of existing businesses along the foreshore is critical
• Acknowledging the potential to encourage and facilitate the growing demand for temporary commercial uses on public foreshore land.

Abbeystowe (Abbey Museum of Art & Archaeology)

Abbeystowe will be a recreation of a 14th century European medieval village, combining high level historical integrity with the aspiration and engagement of a major educational and tourist destination.

Abbeystowe will also draw strength from the Abbey Museum’s priceless collection of medieval art and antiquities, as well as, other aspects of medieval life featured through the collection. Further inspiration will also come from the Abbey Museum’s hugely successful Abbey Medieval Festival, one of Australia’s premier ‘living history’ events held annually attracting 40,000+ visitors.
Samford Commons

Samford Commons is emerging as an exciting precinct using leading-edge technology, creative educational strategies and innovative approaches to engage communities and businesses.

It was conceived from a significant community engagement process and operates as a community-owned, not-for-profit company limited by guarantee.

In partnership with Moreton Bay Regional Council, Regional Development Australia Moreton Bay, and other partners, the Samford Commons precinct is either delivering or planning to deliver services and innovative practice through its:

- Innovation Hub and CoLab
- School of Sustainability
- ESTEM programs
- Renewable energy showcase
- Start-up business program
- Innovation mentoring project
- Integrated Adventure Trails project
- Arts precinct
- Urban farm and markets
- Maker space and festivals.

It will nurture a sustainable regional economy through innovation, collaboration, futuristic thinking, educational capacity and commitment to a sustainable future. It is developing a brand which has national and international potential.

Woodfordia

Woodfordia Inc. has grown to become one of the iconic music and arts venues in Australia, and the Woodford Folk Festival, which is the principal user of the site, has grown to be a global event, internationally recognised and attracting an annual audience of over 130,000 visitors to the Moreton Bay Region.

The provision of new infrastructure and essential service upgrades, will be a very exciting and significant investment, which will enhance the Woodford Folk Festival and will enable Woodfordia Inc. to host a broader range of artists, concerts and theatre throughout the year.

Tourism

Moreton Bay Region Industry & Tourism

Moreton Bay Region Industry & Tourism (MBRIT) was formed during 2015 as a not-for-profit organisation, and has become the official Destination Management Organisation for the Moreton Bay Region.

MBRIT works collaboratively to provide regional leadership in preparing for and delivering a dynamic path of growth and prosperity for the Moreton Bay Region. On Behalf of its membership base of more than 300 organisations, MBRIT:

- Delivers effective promotion of the region as a leisure, tourism and event destination
- Hosts and attracts a wide range of events, festivals and conferences
- Encourages investment attraction
- Provides business support and networking opportunities.

The impact of MBRIT was recognised by Moreton Bay Regional Council, when the organisation entered into a three-year Service Level Agreement with MBRIT to provide a range of event, destination, tourism and economic development management services.

Tourism – Brief Overview:

The Moreton Bay region has significant tourism potential and already attracts many visitors for a range of attractions, events, day and weekend trips, and holidays. It has some of South East Queensland’s best sights, experiences and cuisine, with parks, pristine beaches and waterways, scenic drives, bushwalks, rainforest trails, thriving shopping precincts and vibrant entertainment.

Figure 21 – Redcliffe Kite Fest
(Source: www.redcliffekiteclub.org.au)
There are a wide range of tourism operators in the region including accommodation providers, museums, art galleries, aero sports, water based activities, trails, wineries, markets and restaurants.

Redcliffe Jetty
(Source: Moreton Bay Regional Council)

Tourism provides significant employment and business opportunities, improved leisure and cultural opportunities for residents and visitors, attracts potential buyers and residents to the region and can be a catalyst for change.

A key driver for MBRIT is to grow the visitor and tourism numbers to the region, including from Asia. Other significant opportunities to build momentum and to drive regional branding include the Queens Wharf development in Brisbane and the 2018 Gold Coast Commonwealth Games.

The Woodford Folk Festival is an internationally recognised event that attracts up to 130,000 visitors annually. The Abbey Medieval Festival attracts over 40,000 visitors annually. Other significant annual regional events include Farm Fantastic (48,000 visitors), Celebrate Redcliffe Festival (formerly First Settlement Festival) (40,000 visitors), Festival of Sails (40,000 visitors), the Urban Country Music Festival (35,000 visitors), and the Redcliffe Kitefest (30,000 visitors).
REGIONAL PROFILE

The purpose of this section is to provide a brief overview of the region – its economy, communities and environment.

A brief SWOT Analysis of the Moreton Bay Regional Economy

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ One of the fastest growing regions in Australia – economically and by population</td>
<td>▶ Significant traffic congestion at peak times</td>
</tr>
<tr>
<td>▶ Broad and diverse economic base</td>
<td>▶ Investment in infrastructure not matching population growth</td>
</tr>
<tr>
<td>▶ Strategic location providing direct access to key export infrastructure – Brisbane Domestic and International Airport and Port of Brisbane</td>
<td>▶ Lack of knowledge generating assets in the region</td>
</tr>
<tr>
<td>▶ New University campus opening 2020</td>
<td>▶ Access to and participation rates in higher education</td>
</tr>
<tr>
<td>▶ Training and Education infrastructure</td>
<td>▶ Travel to work patterns</td>
</tr>
<tr>
<td>▶ Significant available land for business use</td>
<td>▶ Over reliance on Brisbane for knowledge based and professional employment</td>
</tr>
<tr>
<td>▶ Significant and highly skilled workforce</td>
<td>▶ Reliance on organic economic growth rather than direct investment attraction and business growth</td>
</tr>
<tr>
<td>▶ Strong and cost-effective business environment and location</td>
<td>▶ Small Business Base – 98% employ fewer than 20 employees</td>
</tr>
<tr>
<td>▶ Location of nationally and internationally renowned festivals and events</td>
<td>▶ Lack of focus on digital disruption and impact on the economy</td>
</tr>
<tr>
<td>▶ National Broadband Network roll out across the region</td>
<td>▶ Limited investment by government on SMART City opportunities.</td>
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<tr>
<td>▶ Good road and rail infrastructure (Bruce Highway, Gateway Motorway)</td>
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</tr>
<tr>
<td>▶ Diversity of skilled workforce</td>
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</tr>
<tr>
<td>▶ Employment rate of 94.6%</td>
<td></td>
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<tr>
<td>▶ Availability of relatively inexpensive industrial land</td>
<td></td>
</tr>
<tr>
<td>▶ Lower tax rates compared to other states</td>
<td></td>
</tr>
<tr>
<td>▶ Strong population growth increasing demand for construction, services, wholesale and retail</td>
<td></td>
</tr>
<tr>
<td>▶ Collaborative environment across government, business and community.</td>
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</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ Significant population growth</td>
<td>▶ Region becoming a “Dormitory suburb” with large percentage of labour force leaving the region for work each day</td>
</tr>
<tr>
<td>▶ Mill at Moreton Bay: driver of up to 6,000 knowledge based jobs</td>
<td>▶ Fragmented small business driven economy</td>
</tr>
<tr>
<td>▶ Economic benefit of the new university</td>
<td>▶ Travel to work patterns focused on Brisbane</td>
</tr>
<tr>
<td>▶ Build capacity of collaboration between education and industry</td>
<td>▶ Lack of knowledge based employment, including government and professional services</td>
</tr>
<tr>
<td>▶ Further develop innovation, entrepreneurship, investor driven eco-systems</td>
<td>▶ Lack of knowledge generating assets in the region</td>
</tr>
<tr>
<td>▶ Secure further investment in R&amp;D, and innovation infrastructure</td>
<td>▶ Reliance on organic economic growth</td>
</tr>
<tr>
<td>▶ Grow the small business base and enhance business confidence</td>
<td>▶ Other South-East Queensland regions with a stronger identity and clearer focus, with more resources allocated to promoting and developing their economies</td>
</tr>
<tr>
<td>▶ Regional employment growth</td>
<td></td>
</tr>
<tr>
<td>▶ Business access to the changing demographic</td>
<td></td>
</tr>
<tr>
<td>▶ Build new and existing supply chains</td>
<td></td>
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<tr>
<td>▶ Attract investment in new and emerging sectors around the Mill at Moreton Bay</td>
<td></td>
</tr>
<tr>
<td>▶ Building new and existing business clusters</td>
<td></td>
</tr>
<tr>
<td>▶ Emerging regional brand across tourism and destination management</td>
<td></td>
</tr>
<tr>
<td>▶ Digital technology, digital disruption, SMART Cities</td>
<td></td>
</tr>
</tbody>
</table>

Figure 23 – SWOT Analysis of the Moreton Bay Region’s Economy
Moreton Bay Region Economy – Quick Stats

- GRP: $13.944bn
- % of Qld GRP: 4.4%
- No. Businesses: 25,506
- Employment: 88,581
- Total % of businesses employing <20 employees: 98%
- Top 5 industries by employment: Retail, Health Care & Social Assistance, Education & Training, Manufacturing, Construction
- Largest industry by economic output: Manufacturing
- Regional Exports: $4.9bn
- Regional Imports: $6.2bn
- Value Added: $12.2bn
- Labour Force: 174,488 persons
- Employment in the Moreton Bay Region: 88,581
- Unemployment (region): 5.4%

Business Parks & Retail Locations

The main industrial, commercial and retail employment locations within the Moreton Bay region include:

- Brendale
- Burpengary
- Caboolture
- Clontarf
- Lawnton
- Narangba
- Northeast Business Park (North Harbour)
- North Lakes.

The region is well serviced by a wide range of sub regional retail centres servicing both urban and rural locations. The key main retail centres, include:

- Arana Hills
- Morayfield
- North Lakes
- Redcliffe / Kippa-Ring
- Strathpine

Gross Regional Product

During 2016, the Moreton Bay region had a Gross Regional Product of $13.94bn contributing 4.4% to Queensland’s economy. (Source: economicprofile.com.au – May 2017).

Output by Industry

The largest industries by size of economic output are manufacturing; rental, hiring & real estate services; construction; retail; property & business services and retail (Source: economicprofile.com.au – May 2017).
Wages & Salaries by Industry

The wages and salaries paid by businesses and organisations in the Moreton Bay Region is estimated at $6.254bn which equates to 4.04% of the $154.790bn in wages and salaries paid in Queensland, and 0.78% in Australia. (Source: economicprofile.com.au – May 2017).

In terms of wages and salaries by industry, the following indicates that health care & social assistance; manufacturing; education & training; retail and construction are the top five.

Registered Businesses and Industry of Employment

The count of registered businesses in the Moreton Bay region by employment size to 30 June 2015 was 25,506 (ABS).

Small to medium-sized businesses dominate the Moreton Bay region economy, with 98% employing 20 or fewer employees (including non-employing businesses). Sole traders, or non-employing businesses, make up 57.98% of the region’s registered businesses, and 30.22% of businesses have 4 or less employees (ABS).

Figure 28 indicates that the top 5 employing industries are: retail; health & social assistance; education & training; manufacturing and construction.
Regional Imports by Industry

Figure 30 indicates the value of regional imports into the Moreton Bay Region by industry. The total value of imports was $6,234bn.

Beyond economic gains, there are many valuable opportunities for building stronger relationships across the region, including through closer educational, cultural and people-to-people links “(Australia in the Asian Century White Paper 2012).

Australia in the Asian Century

The Moreton Bay region with access to strategic export infrastructure and regional investment opportunities is ideally placed to take advantage of the Asian Century.

“Asia’s rise is changing the world. This is a defining feature of the 21st century—the Asian century.

Asia’s extraordinary ascent has already changed the Australian economy, society and strategic environment.

Within only a few years, Asia will not only be the world’s largest producer of goods and services, it will also be the world’s largest consumer of them.

For several decades, Australian businesses, exporters and the community have grown their footprint across the region. Today, for Australia, the minerals and energy boom is the most visible, but not the only aspect of Asia’s rise.

An increasingly wealthy and mobile middle class is emerging in the region, creating new opportunities. They are demanding a diverse range of goods and services, from health and aged care to education to household goods, and tourism, banking and financial services, as well as high-quality food products.

Business Confidence in the Moreton Bay Region (Figure 31)

1318 businesses in the Moreton Bay region responded to the Moreton Bay Region Business Confidence Survey (2015/16). The following is a summary of the key results:

- 82.34% are confident about the future of their business in region
- 62.62% had plans to expand
- 58.52% exported goods and services outside of the region, mainly domestically
- 73.46% of businesses did not experience difficulty recruiting staff
- 53.98% expressed an interest in regional marketing opportunities
- 91% considered high speed broadband to be important.

Top 10 major constraints on business growth:

- Rising overhead and utility costs
- Lack of customers /sales
- Competition
- Global, national state economic performance
- Regulatory environment
- Access to broadband and digital technology
- Increased competition from low cost imports
- Pressure from online competition
- Availability of skilled workers
- Government planning processes

How can regional bodies assist your growth?

- Small business advice and support
- Networking with other businesses
- Website for networking and promotion
- Combined marketing & promotions
- Digital media workshops
- Better understanding of government regulations.

The outcomes of the Business Confidence Survey where largely supported by a further business survey undertaken by CCIQ during February, 2017 as part of the development of a Regional Advocacy Report.
Human Capital

Employment:

The Moreton Bay region has a workforce of 223,233 of which 88,581 are employed within the region and 134,652 residents travel outside of the region, principally in to Brisbane for employment or 60.32% of the working population. (Source: www.economicprofile.com.au; May 2017; ABS May 2017)

Unemployment:

The Moreton Bay Region for employment data is split into two regions:

**Moreton Bay North:** Bribie Island, Deception Bay, Caboolture, Morayfield, Narangba, North Lakes, parts of Redcliffe. The average unemployment rate is 6.4% and for youth unemployment the average rate is 13.1%

**Moreton Bay South:** parts of Redcliffe, Strathpine, Albany Creek, Warner, through Hills District to Samford. The average unemployment rate is 5.3% and for youth unemployment the average rate is 12.1%.

Averages also hide significant variations in the rates of unemployment across the region. Unemployment rates by regional centres as per the March 2017 quarter:

- **Queensland:** 6.2%
  - Albany Creek: 2.1%
  - Bribie Island: 6.8%
  - Caboolture: 11.4%
  - Cashmere: 2.6%
  - Clontarf: 5.3%
  - Deception Bay: 8.8%
  - Eatons Hill: 1.4%
  - Kallangur: 7.9%
  - Lawnton: 9.2%
  - Margate – Woody Point: 7.4%
  - Morayfield East: 8.6%
  - Rothwell - Kippa Ring: 6.2%
  - Scarborough – Newport: 3.1%
  - Strathpine – Brendale: 9.3%
  - Samford Valley: 1.8%
  (Small Area Labour Markets, Dept. of Employment)

**Median Weekly Income**

ABS Census 2016 indicated that the median weekly personal income for people aged 15 years and over in the Moreton Bay region was $652 compared to Queensland $660 and Australia $662. The median weekly family income was $1,638; $1,661 and $1,734 respectively.

**Education and Training**

The region, at the time of the 2016 Census, had a higher share of the population attending primary and secondary schools, and a smaller proportion engaged in tertiary level education compared to the Qld average.

2016 ABS Census data indicated that 7000 residents or 5.5% of the region’s population, were studying at a technical or further education institution, compared with 5.3% in Queensland and 5.9% in Australia.

The Census data also indicated that 13,475 residents or 10.7% of the population were studying at a university or tertiary education institution compared with 14.8% in Queensland and 16.1% in Australia.

In the region, in 2011, residents had a lower percentage of bachelor or higher degrees (9.2%) compared to Qld (12.8%). However, when comparing data for the region between 1991 and 2011, it shows that the region has seen a significant increase in the bachelor degrees or higher obtained over this time - from 4.4% for a bachelor degree or higher degree to 9.2% in 2011.

**Employment by Profession and Employment Skills**

An overview of the Moreton Bay Region resident employment profile by occupation is contained in Figure 32. In comparison to Queensland, the Moreton Bay region has a lower percentage of employment by profession in the managerial and professional category, which reflects employment opportunities and levels of educational attainment in the region, and a higher level of employment in the fields of technicians and trade workers, clerical and administrative workers (Regional Profile, 19 June 2013, Government Statistician; ABS Census 2011).
Therefore, there appears to be a trend toward increased education at the bachelor degree level or higher and a decrease in vocational education enrolments. However, if this decrease signifies a shift of students from vocational to university education, this indicates that education in the region is being advanced. This may also impact on industries such as manufacturing and construction which rely on trade-based employees.

Figure 33 is a summary of the qualifications held by workers within the Moreton Bay Region (ABS Census 2011).

Indigenous Employment, Education and Training

The ABS Census 2016 identified that Aboriginal and / or Torres Strait Islander people made up 3% of the population or 12,571 residents, this compared to 8,483 (2.2 %) in 2011.

The following based on ABS Census data from 2011, highlights the differences in employment, education and training between the indigenous and non-indigenous populations in the Moreton Bay region:

- A lower proportion completed Year 12 (19.8%) compared to the non-Indigenous population in the region (38.3%) in 2011
- A lower proportion completed Year 12 (28.7%) compared to non- Indigenous persons in the region (38.3%) in 2011
- There is a lower level of educational attainment compared to non-Indigenous in the region - 5.5% completed a bachelor or higher degree compared with 9.9% non-Indigenous in the region; 4.9% completed an Advanced Diploma or Diploma compared to 6.9% non-Indigenous in the region; and 16.4% obtained a Vocational certificate compared to 19.8% non-Indigenous in the region in 2006.
- 59.7% had no qualifications compared to 52.1% non-Indigenous in the region & 49.2% in Queensland in 2006
- Indigenous household income was $1,138 a week compared to $1,262 for non-Indigenous households in the region in 2011
- 13.6% were unemployed compared to 4.7% non-Indigenous in the region in 2006.
  (Regional Database, Government Statistician)

Jobs for the Future

The most significant economic development challenge facing the Moreton Bay region is the creation of a broader diversity of employment opportunities to meet the needs and aspirations of its residents, including the 100,000+ workers who leave the region each day for employment. The Moreton Bay Regional Council is seeking to increase the employment self-containment rate to 70% by 2031.

The South-East Queensland RDA Digital Work Hub (2013) report indicated that 74,984 residents commuted to government and private sector employment outside of the region, principally into Brisbane. These numbers are set to increase ahead of the rate of population growth placing significant strain on infrastructure, increasing commuter times and costs. This in turn increases congestion, impacts on the region’s sustainability, the quality of life of residents and places additional costs on doing business in the region.

The majority of future employment will be created by small business, which also needs the confidence to invest and create these opportunities. Investment attraction, new and emerging industries and digital technologies, for example, will also further diversify the economy and create a broader range of employment options.

The Deloitte Access Economics report, Workforce Planning Research for the Sunshine Coast and Moreton Bay Council Regions (2013), indicated that the following occupations will increasingly be in demand between 2011-12 and 2031-32:
- Professionals
- Managers
- Technicians and Trade workers

Predictions for the industrial structure of employment in the Moreton Bay Region in 2011-12 and in 2031-32 are shown in Figure 34 below.
The report also detailed the following expected labour force developments for the Moreton Bay region:

- Declining employment in agriculture, manufacturing and utilities.
- An increasing dominance in the current largest employing sectors within the region, including health care and social assistance, professional, technical and scientific services, education and training, and retail trade. The manufacturing sector is forecast to contract.
- Potential skill shortages amongst the ten most common occupations in the region in 2032, include managing directors, electricians, cleaners and primary and secondary teachers.

- Mining employment growth remaining well below the State average, however, there is potentially greater opportunities for supply of goods and services to the resources sector.
- Skills gaps in resources sector key occupations such as engineers, drillers and geologists are likely to persist, which may provide opportunities for training providers in the region.
- A rising labour supply challenge with a working-age population which is on average older, and therefore at greater risk of not participating in the labour force.
- Skilled workers remaining difficult to find, with the areas of strongest labour demand generally expected to be areas where there are high skill requirements.

**Community**

The Moreton Bay region is the most populous region in Queensland behind Brisbane and the Gold Coast with the region’s population projected to grow to over 585,000 in 2031. With a rapidly growing population and the age profile of the region predicted to grow significantly in the 65+ category, it will be important for the region to address these changes rather than be reactive.

**Age Profile**

The Moreton Bay region has a higher percentage of residents who are infants, children, teenagers and middle-aged adults - indicating the region is home to many young families. ABS Census 2016 data indicated that 21% of persons were aged 0 to 14 years, 66.3% were aged 15 to 64 years and 15.7% were aged 65 years and over. The median age was 38.

The proportion of the population aged 65+ is projected in the region to triple from 39,000 to 128,000 from 2006 to 2031, increasing from 11.7% to 24% of the population. This is expected to have significant impact on the region.

**Families, Households and Housing Characteristics**

ABS Census 2016 data indicated that families totalled 77.4% of all households in the Moreton Bay region. Couple families with children were the most prominent, comprising 44.1% of all family types. This was slightly higher than the state average of 42.5%. One parent families made up 17.3% of all families, compared to the Queensland average of 16.5%.

The larger proportion of residents who are infants, children, teenagers and middle-aged adults in the region, as compared to Queensland, in combination with the large number of couples with children, indicates that the region is attractive to families with children and is an affordable place for family formation (Regional Profile, 19 June 2013, Government Statistician).

More families and young children require adequate and accessible community facilities (education, health, sport and recreation) and local services, including early childhood and child care, services and programs for mothers and family support and youth programs and services.
At the time of the ABS Census 2016, separate dwellings dominated in the region, comprising of 83% of all dwellings. It is projected that couple only and lone person households will grow as a proportion of all households from 48% to 58% over the 25-year period to 2031 (Department of Communities 2010).

Compared to Queensland, households in the Moreton Bay region have similar household incomes. In 2011, nearly a quarter (25.3%) of households had an income between $400 and $999 per week, with 3.8% of households bringing in less than $400, and 59.9% bringing in more than $1000 a week.

20.2% of households in the region were classed as ‘high income’ in 2011 (over $1700 per week before tax). The areas with the highest proportions of high income households were concentrated in North Lakes-Mango Hill, Narangba, Cashmere, and the Hills District (Regional Profile, 19 June 2013, Government Statistician).

Disadvantage

Analyses of the socio-economic index for advantage and disadvantage show local variation in the communities of the Moreton Bay region, with high levels of socio-economic disadvantage evident in some areas such as Caboolture Central and South, Bellara, Margate and Bongaree, mostly in the north and east of the region (ABS 2010).

In the Moreton Bay region in 2011, the proportion of households receiving less than $400 per week (before tax) was 3.8%, of the region’s households, compared to 4.4% in Queensland. While the region had a relatively lower proportion of low income households, it is important to note that this varied across the region. Proportions ranged from a low of 1.9% in Eaton’s Hills to a high of 7.9% in Deception Bay. The five areas with the highest proportions of low income households (less than $400 a week), were concentrated in the north and east of the region (ABS 2010).

Housing affordability issues are also impacting on the region, for the general community, as well as, in those areas experiencing disadvantage.

Volunteers

Moreton Bay has a relatively strong volunteering culture which is generally seen as an indicator of community wellbeing and social connection. At the time of the 2016 ABS Census, there were 58,371 residents or 17.4% of the population who did voluntary work through an organisation or group, compared to 18.8% in Queensland and 19% in Australia.

There is opportunity to increase the level of volunteering in the region to build capacity, support the demands of growth and ageing, and contribute to a safe and caring community.

Internet Connectivity

Internet connectivity is regarded by many as a social barometer of learning, growth and prosperity. ABS Census data 2016 indicated that 85.8% of households had at least one person access to the internet from the dwelling, compared with 83.7% for Queensland and 83.2% in Australia. 12.1% of households indicated that no internet was accessed from the dwelling, compared to 13.6% in Queensland and 14.1% in Australia.
Health

The Moreton Bay region has two public hospitals, one at Caboolture and another at Redcliffe. Private hospital services are currently provided from Caboolture Private Hospital, North Lakes Private Hospital, Marie Stopes International (day hospital), Northside Endoscopy Service, Peninsula Eye Hospital and Peninsula Private Hospital (Queensland Health 2013).

Queensland Health also provides community-based centres in Caboolture, Redcliffe, North Lakes and Pine Rivers. Aboriginal and Torres Strait Islander health services are established in the region, including the Community Health Service at Morayfield and Murri Teilah in Caboolture.

The $53M North Lakes Health Precinct provides a wide range of community-based health care services in the centre of the Moreton Bay region, and is the first of its kind in Queensland – offering primary, community and specialist health care including a $7M state-of-the-art renal unit.

Environment

The environmental diversity of the Moreton Bay region, makes it attractive to both residents and visitors alike.

There is a significant diversity of environmental features in the Moreton Bay Region. The region relies on a healthy natural habitat as the essential building block for sustainable communities and sustainable local economies.

Ecological Footprint

The ecological footprint measures the area of productive land required to support the resource demands and absorb the wastes of a given population. Ideally, the amount of land required to support the global population should be less than or equal to the amount of productive land available. The average footprint for the population for the Moreton Bay Region, is estimated at approximately 8.3g ha per person (higher than for Queensland at 7.19g ha).

An intermediate target would be to reduce the footprint by 25-30% by the year 2026 to 5.5 global hectares (g ha) per person (Queensland State of the Region Technical Report, Qld Government, 2008).

Waste Management

One of the issues of concern to environmental groups and the community is waste management. MBRC is working to reduce waste and its’ carbon footprint, including through the provision of:

- 12 waste facilities within the region, free for residents to use. Facilities accept residential, commercial and industrial waste, including asbestos.
- Free mulch program for residents (using green waste dropped off by residents at waste facilities)
Online and print resources for residents about composting and worm farming to re-use kitchen waste.

There have also been very successful outcomes in effective resource recovery of recyclable waste, as well as, a number of effective school programs in partnership with the Queensland Government to encourage waste reduction and resource recovery programs.

**Climate Change**

Possible impacts of climate change include predicated risks of climate change being heatwaves, bushfire weather, decreasing rainfall patterns and sea-level rise.

RDA Committees may be expected to play a role in the implementation of any Australian Government Clean Energy Future initiatives, by providing feedback on local effects and helping to facilitate solutions to local challenges.

**Water Management**

As the region continues to experience high population growth, the pressure on our waterways will also increase. Concerted management and action by government, community and industry can prevent, reduce or reverse the decline in waterway health. MBRC has prepared management plans for a range of catchments and waterways throughout the region and is partnering in the SEQ Regional Ecosystem Health Monitoring program to monitor the Pine and Caboolture Rivers.

**Vegetation and Wildlife Management**

MBRC manages 9162 hectares of natural area reserves, riparian corridors and road reserves with high biodiversity values in the region. MBRC also undertakes roadside clearing and spraying where required.

Natural Area Management and associated support services in the region are mainly undertaken by MBRC in partnership with the community through various programs such as, bushcare volunteer groups (natural area planting and weeding), Backyards for Wildlife, Land for Wildlife, conservation agreements and research partnerships programs such as the Moreton Bay Koala Conservation Partnership Project and the Shorebird Research Project. MBRC also operates five community nurseries and the Redcliffe Botanical Gardens.

"As the owner of NACC Sustainability and long-time resident of Samford in the region, the natural areas of the region were one of the drawcards for locating my family here, along with the strength of the various community groups that work to protect and educate about our region’s environment. It is also a region where businesses care about the impact they have on the environment and work to be more sustainable.”

Howard Neilson - Principal, NACC Sustainability and Creator of the Greenstreets program

**Open Space, Outdoor Recreation and Walking Trails**

The provision of open space in the region sees 85% of residents living within a walking distance of 500m to a park. MBRC currently has over 500 kilometres of Recreation Trails; 2678 ha of Recreation parkland; 976ha Sports land; 1202ha Conservation land; and 1172ha Bushland Recreation/Outdoor Recreation land (Sports, Recreation and Outdoor Space, MBRC 2013).

Current studies for open and recreation space developed by MBRC include the Sport and Recreation Strategy 2010-19. There are also numerous Park and Open Space Master Plans existing or under development, which outline a future vision for these areas.

A key outdoor recreation initiative for the region, is the Moreton Bay Cycleway, enabling cycling activity within the region and surrounding local government leisure areas.

Other initiatives include the Moreton Bay Recreational Trails, along with an interactive Recreational Trail Map, and a summary of Open Space Areas.
Environmental Education

There are some examples of excellent environmental sustainability practice in the region, particularly within community and education contexts. However, there is a strong need for local government, businesses and communities to embrace sustainability practices, which will lead to more sustainable communities and more sustainable local economies.

There are a diverse number of environmental education programs and activities run by MBRC and community groups, to improve and protect the environment and encourage sustainable practices.

MBRC also operates three community-supported regional Environmental Education Centres and runs a comprehensive school’s environmental education program around waste, sustainability, biodiversity and energy efficiency.

Figure 40 – Woorim Beach, Bribie Island
(Source: www.ourbribie.com.au)
The purpose of this section is to, in brief outline the Commonwealth Government policy and priorities in relation to regional and economic development, as the basis for framing the regional economic development priorities outlined in pages 31 – 38.

1. **COAG key determinants of long-term regional economic growth:**

   ![Figure 4.1 - COAG Key Determinants of Long-Term Regional Economic Growth](image)

2. **Regions 2030 – Unlocking Opportunity:** sets out the Government’s agenda for regional Australia. The importance of this agenda has been highlighted by the establishment of a Regional Ministerial Taskforce, which is placing regional Australia at the heart of government decision making. Regions 2030 is being delivered through investment and activity across the following five areas: jobs and economic development; infrastructure; health; education and communications. These five focus areas acknowledge that a combination of actions across policy areas is required to position regions – and those who live and work in them – to make the most of their potential.

3. **Department of Industry, Innovation and Science:** enabling growth and productivity for globally competitive industries through supporting science and commercialisation; growing business investment and improving business capability, streamlining regulation and building a high performing organisation.

4. **Austrade:** contributes to Australia’s economic prosperity by helping Australian businesses, education institutions, tourism operators, governments and citizens as they: develop international markets and promote international education; win productive foreign direct investment; strengthen Australia’s tourism industry; seek consular and passport services.

5. **Department of Education & Training:** is responsible for national policies and programs that help Australians access quality and affordable early child care and childhood education, school education, higher education, vocational education and training, international education and research.
QUEENSLAND GOVERNMENT

The purpose of this section is to, in brief outline the Queensland Government policy and priorities in relation to regional and economic development, as the basis for framing the regional economic development priorities outlined in pages 31 – 38.

1. **Advance Queensland**: is a comprehensive suite of programs, based on international evidence of 'what works', designed to create the knowledge-based jobs of the future. The programs will drive innovation, build on natural advantages, and help raise the profile of Queensland as an attractive investment destination.

   Advance Queensland will position Queensland as a place where entrepreneurs, industry, universities and government collaborate to turn great ideas into commercial products and businesses that create jobs.

   Accelerating Advance Queensland includes investing $405 million over four years to create the knowledge-based jobs of the future:

   - The Advance Queensland initiative includes a series of programs designed to reinvigorate science and innovation to help create the well-paid, knowledge-based jobs of the future, which will attract and retain world-class scientific and entrepreneurial talent.
   - Building an environment where collaboration between industry and research bodies successfully translates ideas and research into commercial outcomes, new and growing business, and jobs. This will help to make Queensland a destination of choice for businesses looking to partner with industry savvy researchers.
   - Boosting the entrepreneurial culture by improving access to finance, new business opportunities, and management support for startups and small to medium enterprises.

2. **Department of Science, Information Technology & Innovation**: focusing on developing a whole-of-government approach on innovation as a key enabler of the knowledge economy; supporting and investing in research and development; helping businesses to benefit from current and emerging digital technologies; managing the state’s intellectual property policies and services.

3. **Department of Education & Training**: delivering education and training services at every stage of their personal and professional development.

4. **Trade & Investment Queensland**: assisting exporters to break into emerging and established markets, and promoting Queensland as the perfect place for an Asia-Pacific HQ.

5. **Department of Tourism, Major Events, Small Business and the Commonwealth Games**: has a key focus – the success of Queensland’s tourism industry, small business and the 2018 Gold Coast Commonwealth Games – to create a diverse Queensland economy to grow jobs now and create jobs for the future.

6. **Department of State Development**: focused on economic development by growing new and emerging priority industries; facilitating major projects; creating partnerships to deliver a vibrant and dynamic regional economy. The department is producing a series of industry roadmaps as part of the Queensland Governments Advance Queensland program. The 10 year roadmaps and action plans cover: Advance Manufacturing; Aerospace; Biofutures; Biomedical and life sciences; defence; Mining equipment, technology and services.
RDA Moreton Bay covers the same geographic area as Moreton Bay Regional Council (MBRC), it is therefore essential that the organisation’s regional priorities reflect those of MBRC – its key regional partner. In the absence of a current Regional Economic Development Strategy, RDA Moreton Bay has worked at a regional level to form an ‘Economic Development Alliance’ - bringing together MBRC, State Development (Northern Region) and MBRIT, to shape the region’s economic development priorities.
Priority One - Regional Leadership & Advocacy

Regional Development Australia (RDA) Moreton Bay, along with Moreton Bay Regional Council (MBRC), Moreton Bay Region Industry & Tourism (MBRIT) and other key regional stakeholders have a critical role to play in driving regional leadership and advocating on behalf of the region.

The region also needs to be future focused and this will enable the region to:

- Provide a consistent framework to guide regional planning, action and innovation
- Identify and understand the major forces that will shape the big picture environment and the local community into the future
- Place context around regional growth
- Detect social changes before they become trends.

Two key examples of collaborative regional leadership:

Moreton Bay Region Economic Development Alliance: is a cross government partnership to promote a collaborative approach to the economic development of the region. The Alliance is made up of representatives from MBRIT, MBRC and State Government. It was initiated by RDA Moreton Bay to provide a collaborative platform to share information and knowledge; inform regional economic development, priority and initiative setting.

Moreton Bay Regional Chamber of Commerce & BPW Alliance: through the leadership of RDA Moreton Bay the region’s nine Chambers of Commerce, and two Business & Professional Womens networks meet on a quarterly basis, supported by CCIQ, MBRIT and MBRC.

The meetings are focused on information and knowledge sharing, developing joint initiatives and events, and promoting collaboration.

Business membership across the collaborating organisations, including MBRIT members and the members of the RDA Moreton Bay business cluster groups exceeds 1000!

How RDA Moreton Bay Adds Value:

- Leadership role advocating, engaging, connecting and building partnerships with all levels of government, business and community
- Engaging business groups
- Promotion of government programs
- Research & Intelligence: what are the critical issues, key challenges and trends facing the region?
- Thought Leadership – identifying opportunities to support the economic development of the region.

Priority Two - Catalytic Economic Infrastructure & Investment Attraction

Economic infrastructure and investment attraction are critical components to support the growth of one of Australia’s fastest growing regions.

The focus of this priority is to secure and attract the funding to enable the development of key infrastructure, which will have a transformational impact on the economic development of the region, including the creation of knowledge based employment precinct’s and SMART communities.

Clearly, the Mill at Moreton Bay is the key infrastructure project as detailed on page 11-12.

The creation of a new campus for up to 10,000 students will have an economic impact of $950m per annum for the region. Additional developments across associated precincts will create up to 6,000 much needed knowledge based jobs and will include investments in innovation centres, business accelerators, private hospital and business parks, further stimulating the economic development of the region.

RDA Moreton Bay is proud of instigating the Tertiary Education Strategy and securing funding from Council to support this initiative. The strategy laid the foundation for the Mill at Moreton Bay and USC becoming the education partner.

The MBRC focus also includes investment attraction to further enhance the economic impact of the Moreton Bay Rail Link, supporting precinct development at the stations along the new rail line.

The decentralisation of Australian Government departments could also be a significant opportunity for the region.

Other major regional projects are detailed on pages 12-16.

How RDA Moreton Bay Adds Value:

- Identifying and advocating for key economic development infrastructure
- Promoting government programs & funding sources
- Assisting with funding applications
- Identifying regional projects and supporting project proponents to access funding.
Priority Three – Building Better Businesses

The focus is to support business growth through collaboration, innovation and entrepreneurship.

A stronger, engaged and better supported business community will improve business confidence, and enhance an environment encouraging investment, innovation, entrepreneurship and job creation.

RDA Moreton Bay continues to focus on building collaborative business clusters and networks to support business growth.

Entrepreneurship!

Recognising the importance to support residents to follow their entrepreneurial dreams and create their own businesses, RDA Moreton Bay has partnered with Edgeware Creative Entrepreneurship and Advance Queensland to provide training, mentoring and peer support to enable residents to create their own new businesses.

Innovation!

Moreton Bay Regional Council launched the Innovation Awards* during 2015 to recognise and reward innovating businesses from across the region. The Innovation Network provides ongoing support to regions innovating businesses and links them in to government programs and investor networks.

A testament to the increased profile of the level of innovation capacity and capability across the region, was the allocation through Advance Queensland of $500k from the Advancing Regional Innovation Program. The funding will enable RDA Moreton Bay, MBaIT and project partners to continue to build the innovation and entrepreneurial eco-system across the region during 2017-20.

Business Excellence & Innovation Awards

The awards aim to support commercialisation, business development and collaboration across the region.

Recognising leaders and innovators, and providing businesses with a unique opportunity to benchmark their performance against other like businesses.

The awards will replace the Innovation Awards from 2017/18.

Business Conference Series

During 2017/18, MBaIT will be organising four full day business forums, consisting of concurrent professional development and information workshops followed by a networking lunch with high profile guest speakers.
Business Cluster / Network Development

Business Cluster Development (Figure 43)
RDA Moreton Bay has taken a leadership role to initiate and manage business cluster development across business precincts and key sectors, including:

- Narangba innovation Precinct (Manufacturing)
- Moreton Technology Alliance (Digital technology and ICT)
- Agribusiness – strawberry sector
- Food & Beverage Production
- Marine.

This activity is complimentary to the following and related activities of partner organisations, including:

- Food Tourism & Trails – MBRC
- Bio Medical & Life Sciences, Defence, Advanced Manufacturing and Mining Equipment, Technology & Services – Dept. of State Development
- Study Moreton Bay – MBRC.

Business clusters generate:

- More employment
- Higher economic growth
- Higher wages
- Better productivity
- Higher levels of innovation
- Increased levels of entrepreneurship
- Attract more investment/new industries emerge
- Higher patent levels (indication of innovation).

International Trade!

Export market development is a key component of the Moreton Bay regional economy – both domestically and internationally.

RDA Moreton Bay in partnership with MBRC, MBRT, Austrade (Tradestart) and the Queensland Government have established the Moreton Bay Region Export Network to support the region’s exporting businesses, and those considering international trade.

The collaborative network focuses on:

- Building export capacity and capability
- Promotion of government agencies and services
- Sharing of knowledge, skills and information through collaboration with other businesses.

Narangba innovation Precinct

Narangba innovation Precinct (NiP) is a precinct of 200+ businesses, mainly manufacturing, creating significant employment opportunities and economic value for the region.

Professional Services Network!

The premise is to support the professional services sector to support their clients to ‘Build Better Businesses’ through:

- Enhanced knowledge and access to government programs
- Connections with government agencies, including RDA Moreton Bay
- Networking across the sector.
The RDA has facilitated the rebranding of the precinct, and supporting businesses to collaborate, including accessing funding for workforce development projects.

**Food, Beverage & Agribusiness**

**Economic Impact of the Agri-business sector:**
- Sales: $387.4m
- Employment: 1,732 (1,280 FTE)
- Exports: $99.1m
- Imports: $24.1m
- Products: Cereal crops; broadacre crops, nurseries & cut flowers; vegetables; citrus fruit; fruit; nuts; milk; livestock.

**Economic Impact of the Strawberry Industry:**
- Sales: $46.6m
- % of Queensland Production: 63%

**Economic Impact of the Food & Beverage Product Manufacturing Industry:**
- Sales: $356.5m
- Employment: 976 (736 FTE)
- Exports: $121.1m
- Imports: $1.013bn

The data above formed the basis for a regional approach by RDA Moreton Bay, MBRI and MBRC to support the growth and development of the regions food, beverage and agribusiness production sectors.

RDA Moreton Bay successful launched the Sweetest Jobs Campaign during 2016, to assist growers to recruit local labour in response to the downturn in ‘back packer’ labour following the proposed ‘back packer tax’. During 2017, the project will be run again with funding from Skilling Queenslanders for Work, and will also be extended to recruitment and training supporting employment in the food and beverage production sector, and wider agribusiness sector.

**Food, Beverage & Agribusiness Network**

A food, beverage and agribusiness cluster will also be further developed by the RDA in partnership with MBRI and MBRC during 2017-18, and will include regional business development opportunities across food trails, Queens Wharf and the Commonwealth Games.

**Digital Technology**

Digital technologies including broadband services can help regions to create better futures, enhance their competitiveness, realise their visions and pursue their priorities.

The most successful regions are those that adopt a strategic approach, with projects and actions that match their unique local characteristics and opportunities. That is why RDA Moreton Bay partnered with MBRI and the Queensland Government to commission the region’s first Digital Futures Plan.

Digital technologies are both disruptive and transformational. They are changing our lives – how we live – how we learn – the way we work – types of industries we work for – the skills and jobs of the future – creating new industries, new opportunities and fresh challenges.

The NBN has already commenced build phase across the region, providing a competitive advantage over other regions in Australia, notwithstanding both residents and businesses have access to digital technologies through existing infrastructure, however, blackspots across the region still exist.

There is a wide variation in the adoption of digital technologies by the region’s businesses. Some businesses are using digital technologies in agile and transformational ways, but many businesses lack fundamental capacities for adopting technologies in effective ways.

RDA Moreton Bay, for many years, has advocated for digital commuting and Digital Hubs to enable more of the region’s residents to be able to work from home or from a regional hub, to avoid the daily commute, principally into the Brisbane CBD.

The region is in a unique position to embrace SMART City thinking, including the integration of ICT and IoT across the Mill at Moreton Bay and new master planned developments, such as Caboolture West.
Moreton Technology Alliance (MTA)

The MTA is a digital / IT business lead organisation established from the RDA Moreton Bay digital technology and media cluster.

It is in a unique position to support the growth of its own sector, but also to assist other businesses to integrate technology into their own business operations.

The MTA is also able to take a lead role in the implementation of the region’s Digital Futures Plan, and the ongoing development of the RDA’s Digital Moreton Bay platform.

How RDA Moreton Bay Adds Value:

- Regional lead on business cluster development
- Established the Moreton Bay Region Chamber of Commerce & BPW Alliance, and the Economic Development Alliance
- Initiated and delivered Start Up Moreton Bay Region
- Leading collaborative business cluster development and management
- Project initiation and securing funding from across government and industry
- Creating collaboration across government, chambers of commerce and business groups
- A lead organisation in securing Advancing Regional Innovation Program funding
- Promotion of government programs
- Collector of regional business intelligence
- Advocating for business
- Supporting innovation and entrepreneurship.

Priority Four: Education

It is recognised that as one of Australia’s fastest growing regions, the Moreton Bay region is under-served by the tertiary education sector and that significant opportunities are available to improve the availability of both education and vocational training. Such investment would better meet the needs of a rapidly growing population and one of the fastest growing regional economies in Australia.

The Moreton Bay Region has lower than average participation rates in higher education in Queensland. The lack of university infrastructure combined with the time and cost of transport for students to attend university in Brisbane is also a significant barrier to undertake a university education. Reflected in the lower than Queensland average for aspiration to attend, and subsequently participate in a university education.
The Mill at Moreton Bay

The critical economic development priority for the Moreton Bay region is to take forward the development of the Mill at Moreton Bay, with emphasis on the University in partnership with the University of the Sunshine Coast, as detailed under ‘Priority One’, and in the Major Projects section of this document.

A 10,000-place university and the associated proposed developments around a STEM school; health, innovation and knowledge based precincts, will drive the future economic development of the region.

The Mill at Moreton Bay will be the best positioned university and wider educational campus in Australia, able to take advantage of the digital disruption and the significant global change impacting on the education sector, including:

- Democratisation of knowledge
- Digital technologies
- Integration with industry
- Global mobility
- Contestability of markets and funding
- Changes to how the Commonwealth Government funds university places.

The tertiary education sector has the potential to play a significant role in the development of the Moreton Bay region:

- Tertiary education institutions are often the major regional employer and purchaser of goods and services
- Driver of the knowledge economy
- Promotion of innovation through new skills, research and development through relationships with industry
- Builder of new and emerging industries
- Ability to promote business clusters through collaboration and integration
- Promotion of regional identity through specialisation and regional leadership
- Widening the employment base of the region and providing opportunities for employment and retention of graduates in their home region
- Provider of educational opportunities for disadvantaged population and areas.

Study Moreton Bay

Education is also Australia’s largest export, and the fourth largest export earner overall. Because of Asia’s growing middle class, it is expected to increase its share of the economy.

Already, 79% of the income generated by the education sector is linked to Asia, mostly through universities. Regional universities, schools and vocational education institutions will play an important role in growing Australia’s education services industry.

Study Moreton Bay aims to position the region to take advantage of this opportunity, initially through High Schools and Homestay’s before engaging with university students following the opening of the university precinct at The Mill Moreton Bay during 2020.

Study Moreton Bay will be taken forward by MBRIT, with the support of Trade & Investment Queensland (International Education and Training Strategy), MBRC, RDA Moreton Bay and the region’s high schools, initially focusing on those schools with international visitation and home stay programs.

The attraction of international students, and their friends and family, as the potential to raise the regional brand as an education and tourism destination, as well as, providing a significant input into the region’s economy.

Initial steps will include a formal partnership in this space across Moreton Bay, Sunshine Coast and Wide Bay Burnett regions to host familiarisation tours for intermediaries, and the formation of an ‘Education Cluster’, bringing together the region’s high schools and vocational institutions to collaborate to maximise the educational, tourism and economic benefits of this initiative.
How RDA Moreton Bay Adds Value:
- Advocate and support for the development of the Mill at Moreton Bay and Study Moreton Bay
- Support cluster development around Study Moreton Bay and international student engagement
- Promoting government programs & funding sources
- Assisting with funding applications

Priority Five: Tourism & Events

The emergence of Moreton Bay Region Industry & Tourism (MBRIT) as the region’s tourism and destination management organisation, and its agreement with Moreton Bay Regional Council, has highlighted the growing importance of the tourism sector to the economy of the Moreton Bay Region.

The Importance of Tourism (Figure 46)
The 2015 Tourism Impact report produced by Earth Check highlighted the importance of the tourism sector to the region’s economy.

- Since 2006 the sector has seen above average growth of 5% in both domestic and international visitors. The national average is just 1.8%!
- Key markets for visitors are Brisbane, Sydney, Gold Coast, New Zealand and the UK
- 2.9m visitors per annum. 21% increase in visitation since 2010
- Generating $670m in total visitor spend
- Supports 5,426 jobs and 1,032 tourism related businesses
- 7th largest contributor to the Queensland visitor economy
- The majority of the visitors stay with friends and family
- Majority of visitors come for the day.
(Year ending December, 2014)

Visitors in 2025!
The Tourism Research Australia’s Tourism Forecasting Committee (TFC) forecasts visitor targets prepared by Deloitte Access Economics, which indicates that the region could attract:

- 436,000 additional visitors
- 722,000 additional nights.

The Moreton Bay Region tourism offer is diverse and expanding from bayside communities, surf beaches, hinterland and the villages of Samford, Dayboro and Woodford. Providing a broad range of experiences for the visitor:

Explore the Hinterland! Bush walking, Camping, Cycling, Mountain Biking, Country Markets, Food, Wine, Events and History!

Food & Beverage! The region is home to a fantastic variety of food and beverage producers, and experiences, including Moreton Bay Bugs. MBRIT will be working to develop Food Trails as a new tourism product – enabling visitors to plan their own tailored tours of the region.

Figure 42 - Mt Mee Rocky Hole

Discover the Bayside! Beach Driving, Swimming, Surfing, Boating, Seafood, Whale Watching, Music and Events!

Figure 43 - Bribie Island
Iconic and Major Events

The Moreton Bay Region is the home of some iconic internationally and nationally recognised events, including the Woodford Folk Festival and Abbey Museum Medieval, which combined, generates more than 150,000 visitors annually!

The region also hosts a broad range of events and festivals, including the Kite Festival, Sails Festival, Strawberry Festival, Jetty to Jetty, and other community events including the Dayboro Show and the Hills Carnival.

The economic impact of these events is significant and MBRIT is working to increase the range of events and to maximise their impact for the benefit of the tourism sector.

For example, the Woodford Folk Festival generates an economic contribution to the region of $29$m per annum (Year ending December 2014).

How RDA Moreton Bay Adds Value:

• Advocate and support the growth of the region’s tourism and events sector
• Support the work of MBRIT, MBRC and Trade & Investment Queensland in this space.
• Support tourism business engagement and collaboration
• Promoting government programs & funding sources
• Assisting with funding applications.

Asia Ready Strategy

MBRIT is working on the development and implementation of an Asia Ready Strategy, to support the region’s tourism market and operators to position themselves for the predicted significant increase in visitors from Asia to Australia.

The strategy will support the alignment of the region’s tourism offering to Asian visitors and support tourism operators to be able to provide high quality tourism customer care to visitors.

Asian medical tourism is also a potential opportunity for the region, aligning the regions medical precincts and broader tourism offering.
Appendix One – Stakeholder Engagement

RDA Moreton Bay engages with a cross section of government agencies, business and community groups, including:

- Moreton Bay Regional Council (MBRC)
- Moreton Bay Region Industry & Tourism (MBRIT)
- Department of Infrastructure & Regional Development
- Department of Industry, Science and Innovation
- Department of Education & Training
- Advance Queensland
- Trade & Invest Queensland
- Department of Tourism, Major Events, Small Business and the Commonwealth Games (Qld Government)
- SEQ North Region, State Development (Qld Government)
- Dept. of Science, Information Technology & Innovation (Qld Government)
- Austrade
- AusIndustry
- Dept. of Employment
- Department of Health (Commonwealth Government)
- Chambers of Commerce & Industry Qld (CCIQ)
- Bribie Island Chamber of Commerce
- Commerce Caboolture
- Hills & District Chamber of Commerce
- North Lakes Chamber of Commerce
- Pine Rivers Chamber of Commerce
- Samford Chamber of Commerce
- Moreton Bay Central Commerce
- Redcliffe City Chamber of Commerce
- Commerce & Industry Redcliffe Peninsula
- BPW – Caboolture and North Lakes
- Australian Industry Group
- Samford Commons
- Abbey Museum
- Woodfordia Inc
- Quest Newspapers and other media
- SEQ RDA Network
- Federal and State MPs
- Sunshine Coast Regional Council
- Queensland Raceways
- Queensland Strawberry Growers Association
- Growcom
- Food Innovation Australia Limited (FIAL)
- Food and Agribusiness Network (FAN)
- Edgeware Creative Entrepreneurship
- Narangba innovation Precinct
- Moreton Technology Alliance
- The Job Show / Stones Throw Consulting.

Cross-Border Relationships

RDA Moreton Bay is working closely with RDA Sunshine Coast and Sunshine Coast Council, including across agribusiness and food and beverage sectors, through the Sweetest Job Campaign, funded through Skilling Queenslanders for Work.

Both regions also face similar challenges with population growth and the need to create additional employment for residents to support enhanced regional sustainability, and to become less reliant on Brisbane for employment.

The Moreton Bay region also naturally has a number of linkages with Brisbane with a focus on accommodating significant population growth and housing to support the growing demand for employment within the Brisbane CBD. The region’s competitive advantages also stem, in the main, from proximity to key export infrastructure which Brisbane provides. The Moreton Bay region also needs to attract some of the investment and employment opportunities away from the Brisbane CBD to a lower cost region, thereby supporting its own future sustainability to avoid becoming increasingly a ‘commuter suburb’ for Brisbane.
Regional Roadmap - Stakeholders

Figure 45 - Stakeholders that RDA Moreton Bay has engaged with 2010 – 2013  
(Source: RDA Moreton Bay)
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