



Sunshine Coast
Regional Economic Development Strategy

Implementation Report Card
2013–2018

May 2018
Implementation Pathways 1

Foreword

The REDS Implementation Report Card

Since the development of the Sunshine Coast Regional Economic Development Strategy 2013-2033 (REDS) the Sunshine Coast economy has undergone a period of noticeable growth and change.

The REDS was developed in partnership with Sunshine Coast Regional Council, the State Government, the University of the Sunshine Coast and key local business and industry partners, to guide and facilitate economic development and activities in the region. Fundamentally, the REDS provides a clearly articulated strategy for the transformation of the region's economy over 20 years, focussing on:

- Lifting the identity of the Sunshine Coast as an ideal investment and business location;
- Delivering significant capital investment in 'game changing' regional infrastructure projects;
- Expanding and growing the mix of enduring employment opportunities in high-value industries;
- Driving greater connectivity between the Sunshine Coast economy and business community with national and global markets;
- Strengthening the ongoing investment and focus on talent and skills to provide the labour force pipeline that the region's new economy will require.

The REDS includes four aspirational goals for the region's economy over twenty years until 2033.

This report has been produced to highlight achievements in the first five year implementation plan as at 2017, recognising that the first five year reporting period concludes on 30 June 2018.

Aspirational Goals 2013 – 2033

2013

A \$13.8 billion economy

High-value industries provide 59,000 employment opportunities

13.6% of goods and services produced for export outside the region

Household income levels 22.3% below the State average

2033

A \$33 billion economy

High-value industries provide 100,000 employment opportunities

20% of goods and services produced for export outside the region

Household income levels above the State average

Additionally, the REDS provides clear pathways for action planning and implementation. These pathways are:

- Leadership, collaboration and identity
- Capital investment
- High-value industries
- Local-to-Global connections
- Investment in talent and skills

This Implementation Report Card provides insights regarding the progress made on the aspirational goals for the new economy in 2033, progress aligned to each of the implementation pathways and case studies/success stories.

Sunshine Coast Council would like to thank the signatories and partners of the Regional Economic Development Strategy and acknowledge the valuable contribution they have made to the implementation of the REDS and the continued growth of the Sunshine Coast economy.



Futures Board



Regional Collaboration High-Value Industry Taskforces & the Futures Board

The development and implementation of the Regional Economic Development Strategy continues to be a truly collaborative process. Over the past five years, leaders from across business and industry have contributed significantly as members of the various High-Value Industry Taskforces or as a member of the Futures Board. Sunshine Coast Council would like to acknowledge the following people and thank them for their role as a former or current board or taskforce member.

Of course, there are many other contributors who have provided input, advice and leadership on an informal basis through one-on-one meetings, workshops and forums held across the region. Thank you to all involved.

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A Growth Economy Message from the Mayor

Our Sunshine Coast is becoming one of Australia's leading city regions for the 21st century.

We are experiencing a time of growing prosperity as the region's economic growth, led by the implementation of our game-changing projects, continues to impress everyone I speak to locally and overseas.

One of this council's priorities when it was first elected in 2012 was to work with industry to develop a clear 20-year economic plan, which supports a strong, new economy. So, in 2013 the Regional Economic Development Strategy 2013-2033 was introduced, the first truly regional strategy developed and delivered in collaboration by council, business, industry leaders and the community.

Our goals were ambitious but with a great deal of effort, we have made significant gains.

In fact, according to an independent KPMG review of the REDS first five-year action plan, we are well on our way to achieving our 20-year goal to grow Gross Regional Product, accompanied by an increase in high-value employment, exports and household income.

Our bold thinking and real action has seen us put significant runs on the board, making us one of the strongest regional economies in Queensland.

Our region has also become a leader in renewables with Sunshine Coast Council being the first local government in Australia to offset 100% of our electricity consumption with energy from a purpose-built solar farm.

The region's new \$1.8 billion tertiary teaching hospital is now one year old. An \$81 million expansion of the University of the Sunshine Coast has been completed and work is well and truly underway

on two council-led projects - a new city centre at Maroochydore and the Sunshine Coast Airport expansion project.

As we move further into 2018, we have \$12.5 billion in public and private investment underway or in the pipeline fuelling growth in a number of high-value industries across the region.

Each year, 500 to 600 new businesses are opening in our region in diverse areas such as food and agribusiness, financial and insurance services, and health care among others.

This past year has also seen Youi open its \$73 million global headquarters. The Sunshine Coast beat off numerous locations to secure a home for Youi's 1300 staff that has the potential to grow to 3000 in the coming years.

On the back of the game changer projects and private investment, our Sunshine Coast has the

second highest percentage of jobs growth across Queensland and an unemployment rate that is a full percentage point below the State average.

We are also seeing our average household income levels rise significantly - no doubt a product of new investment and the new employment this fuels.

With clear economic planning, in the REDS we have created a healthy, smart, creative future we can all look forward to with confidence. There is no other region in Australia offering the opportunities or the collaboration found on the Sunshine Coast.



Mayor Mark Jamieson

Estimated Current Position

The Sunshine Coast

The estimated current position of the region's economy in relation to the four key goals for the new economy is included in the following table as provided by KPMG and AEC Group.

2013 Baseline	2017 Target	2017 Position	2033 Goal
\$13.8b economy	\$16.4b economy	\$17.2b economy	\$33b economy
13.6% of goods and services produced for export outside the region	14.7% of goods and services produced for export outside the region	17.9% of goods and services produced for export outside the region	20% of goods and services produced for export outside the region
59,000 High-value industry employment opportunities	65,600 High-value industry employment opportunities	82,633 High-value industry employment opportunities	100,000 High-value industry employment opportunities
22.3% household income below Qld average	18.3% household income below Qld average	9.33% household income below Qld average	Household income levels above the Queensland average

*Source: KPMG and AEC Group



Current Business Confidence

The Sunshine Coast

The November 2017 Boardroom Business Confidence Index is the 18th survey in the Sunshine Coast Business Confidence Survey series. Using the data collected since 2009, the Boardroom Business Confidence Index demonstrates increasing confidence trends over time.



Source: Boardroom Business (2017) Sunshine Coast Business Confidence Survey (November 2017)



The index reflects a six-points increase on the year on year average (113/107 points) this indicates consistent levels for 2018

Source: Boardroom Business (2017) Sunshine Coast Business Confidence Survey (November 2017)

Figure 01

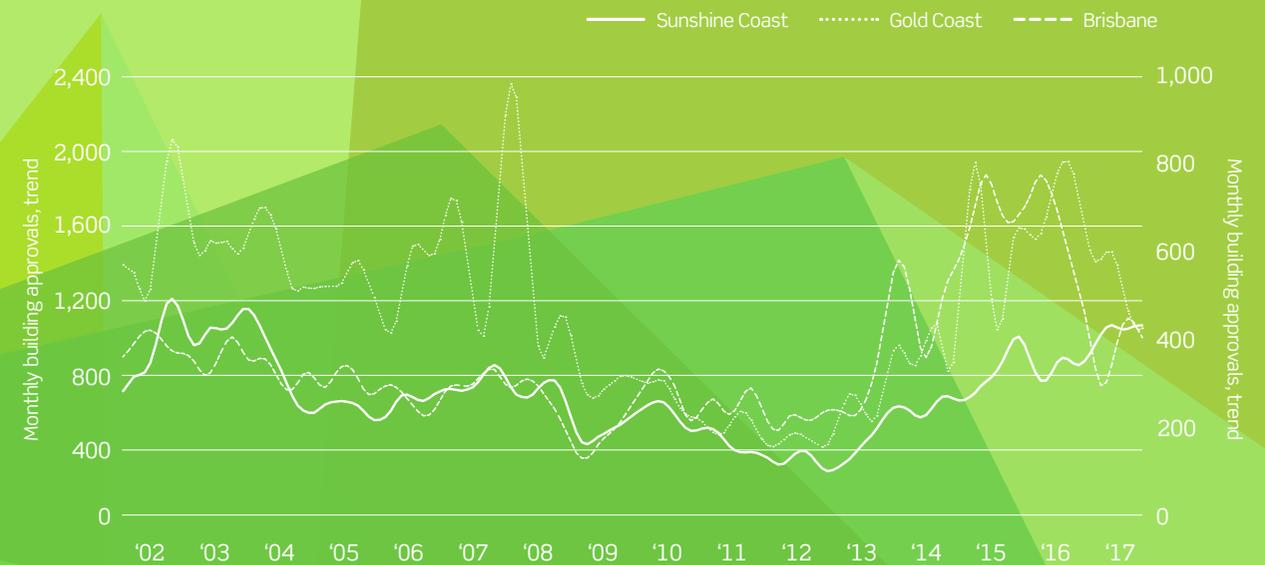
Unemployment Rates are low in South East Queensland



Source: ABS, ANZ Research

Figure 02

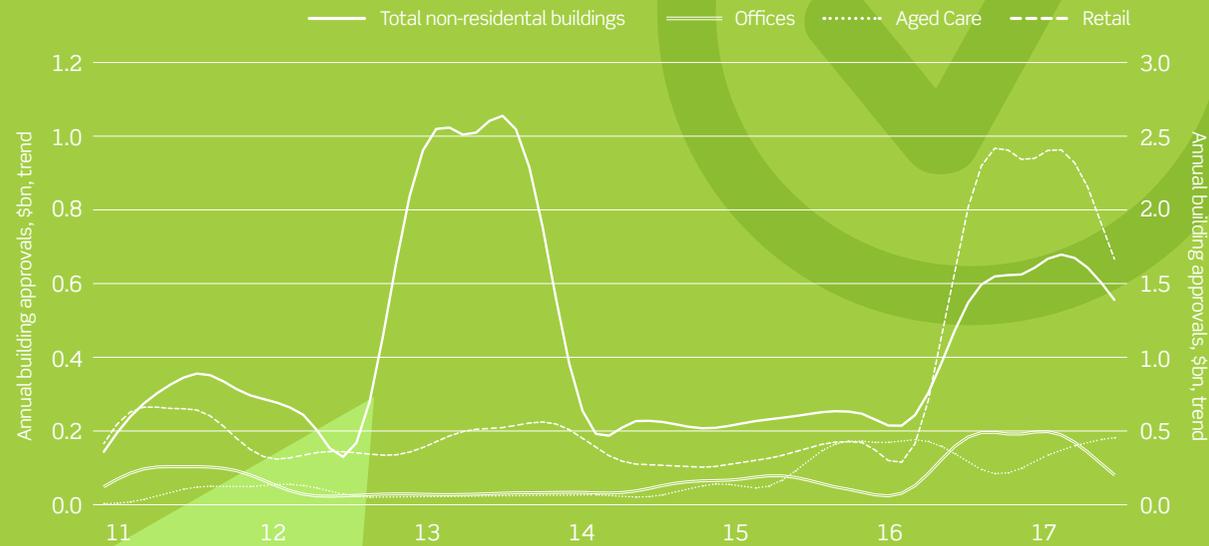
Housing Construction on the Sunshine Coast is booming



Source: ABS, ANZ Research

Figure 03

Commercial building looks promising on the Sunshine Coast



Source: ABS, ANZ Research

Figure 04

Tourist arrivals are still rising strongly nationwide, led by China



Source: ABS, ANZ Research

Key Outcomes 2017 – 2018

Key outcomes from the 2017-2018 Australian Local Government Association (ALGA) State of the Regions Report delivers a clear indication of a positive growth story for the Sunshine Coast when compared to other similar regions across Queensland.

16th

Highest Economic Performance from 67 regions nationally

16.5%

Decrease in Unemployment throughout the region

2.3%

Population increase during the 2016/17 period

2nd

Highest total income per capita across South East Queensland (excl. Brisbane)

\$844k

Wealth per household, the 2nd highest across Queensland

2.1%

Recorded annual growth of Gross Regional Product (GRP)

Development Indicators 2017 Report

The Development Indicators 2017 Highlights Report presents a selection of development statistics for the Sunshine Coast Council Local Government Area for the period 1 January 2017 to 31 December 2017 with comparisons to the previous year.

18%

increase in the value of Building Approvals compared to 2016

\$871m

Approved New Dwellings 16% increase

\$274m

Approved Multiple Dwelling Units 1% increase

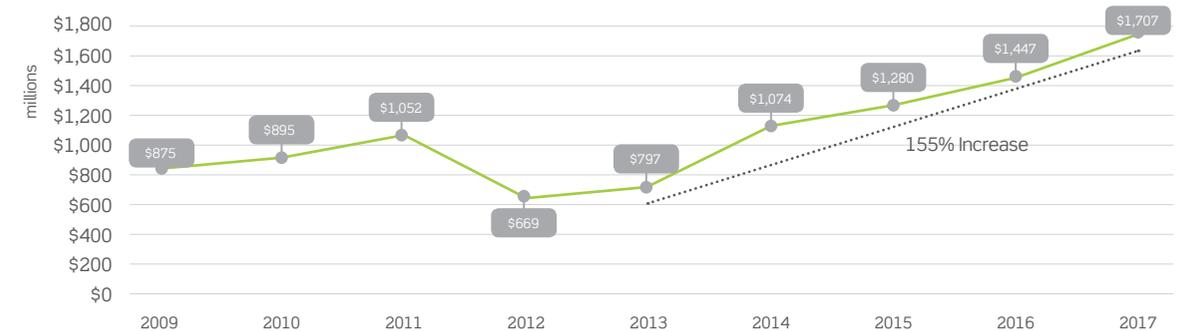
\$245m

Approved Other Buildings (including Schools, Aged Care, Industrial Building) 498% increase

\$1.7b

Building Approvals issued in 2017. The highest value of building approvals in the Sunshine Coast area for the past 9 years

Building Approvals



Source: Sunshine Coast Council 2017



Implementation Pathways

The REDS identified five essential pathways to guide the development of a new economy. These pathways were established as enablers of economic change and to provide a framework to guide the decisions and actions undertaken by the Sunshine Coast Council and other key regional stakeholders.

The five implementation pathways identified include:

- Leadership, Collaboration and Identity
- Capital Investment
- High-Value Industries
- Local-to-Global Connections
- Investment in Talent and Skills

Each of these pathways has between two and three main priorities to ensure the Council and stakeholders are focused on what needs to be done to achieve their shared vision for the future of the regional economy.

To advance each priority, a number of actions were established for the first five years of the strategy.

Implementation Priority Key:

- ✓ Completed and/or Ongoing
- Underway, not yet completed
- ✗ Not yet Implemented



Case Study

CAVE2

The University of the Sunshine Coast's state-of-the-art Engineering Learning Hub (ELH) delivers world class learning and teaching facilities over three levels.

At the core of this building are three cutting-edge visualisation facilities which provide a hybrid of 2D and 3D virtual reality learning environments which allows students to see and interact with complex data in ways that accelerate and deepen their learning.

The largest of these facilities is the Visualisation Studio which houses the CAVE2: Cave Automated Virtual Environment. One of only four of its kind in the world (one in Melbourne and two in the USA), the CAVE2 provides a near-seamless, 320-degree, immersive, panoramic 3D virtual environment. It is the next generation of virtual, immersive visualisation technology.

usc.edu.au

Leadership

Collaboration & Identity

Priority A.

Strong economic leadership and collaboration by government, business and industry

- ✓ Establish and support a regional economic leadership board to guide the transitions to, and build the identity of, the New Economy.
- ✓ Identify and mentor potential business and community leaders.
- ✓ Support business excellence through highly competitive awards and recognition programs.
- ✓ Report annually to the community on the delivery of the actions contained in the Strategy.
- ✓ Incorporate the principles and priorities of the Strategy into the Sunshine Coast Planning Scheme.

Priority B.

A recognised competitive regional identity

- ✓ Develop a new regional brand that embodies the vision for the New Economy.
- ✓ Adopt a targeted program and approach to promoting the region's and competitive advantages to potential investors and priority markets.
- ✓ Establish a Sunshine Coast ambassadorial program – utilising local identities, business leaders and international students to promote the region.

Pathway Key Outcomes

.01

Establishment of the Sunshine Coast Economic Futures Board which reports annually on the implementation of the REDS.

.02

Sunshine Coast Planning Scheme shaped by the Regional Economic Development Strategy.

.03

Sunshine Coast Council was recognised with three awards at the Economic Development Australia National Excellence Awards across 2016 and 2017 and a finalist in four other awards.

.04

Creation of Food and Agribusiness Network by industry which has grown into Australia's largest food network/cluster.

.05

Working with SunCentral, supported the promotion of the Bernard Salt 'The Activated City' across various channels nationally.

.06

Sunshine Coast Airport's marketing campaigns and route development achievements won the Routes Asia 2017 Marketing Awards.

.07

Sunshine Coast has been named a Smart21 community in four of the last five years in a field of more than 400 cities from around the world.

.08

Invest Sunshine Coast established and promoted nationally and internationally.

.09

Invest Sunshine Coast Ambassador Program established with key representatives for each of the high-value industries.



Case Study

Sunshine Coast Business Awards

The Sunshine Coast Business Awards has continued to grow as the region's premier awards program. In 2017, more than 1000 nominations were received from local businesses with 580 business people attending the awards gala dinner.

The Sunshine Coast Business Awards enable us to recognise the efforts, achievements and success of businesses across the whole of the Sunshine Coast particularly those who shine in their industry. The Awards also acknowledge the important contribution of our business community in growing our regional economy - the second strongest performing regional economy in Queensland. These local businesses have helped strengthen the region and created jobs, ensuring that we continue to record some of the highest business confidence levels in the State.

sunshinecoastbusinessawards.com.au



Multi-award winning company, HeliMods deliver innovative, world leading aerospace products and services and are recognised as global leaders in their field.

helimods.com

Pathway Key Outcomes

.01

Priority investment in areas associated with game changer projects such as airport, hospital and Maroochydore CBD.

.02

Palisade Investment Partners confirmed as commercial airport partner in February 2017.

.03

\$1.6 billion committed to upgrading the Bruce Highway.

.04

Regional investment prospectus delivered in May 2015 and updated annually.

.05

Investment missions made to Asia and Europe to identify alternative funding sources.

.06

Delivered Ambassador and Corporate Partnership Program to support capital investment leads and opportunities.

.07

Sunshine Coast Council attracted/retained/supported investment projects with more than \$169 million in capex and impacting more than 5,000 jobs.

.08

Aura at Caloundra South covers 24 square kilometres and will have more than 20,000 dwellings with 50,000 residents in 30 years, creating more than 40,000 jobs over the next 3 decades.

.09

\$60.8 million Sunshine Coast Health Institute established at the Sunshine Coast University Hospital, with a Griffith University Medical School to be operational by 2019.

Capital Investment

Priority A.

Securing investment in the region's infrastructure priorities

- ✓ Identify alternative funding models for the expansion of the Sunshine Coast Airport and the development of the Maroochydore City Centre and address impediments to securing investment in these projects.
- Seek a firm financial and delivery commitment from the federal and state governments to the expansion of the Bruce Highway from Caboolture to the Sunshine Coast and future transport solutions.
- ✓ Develop a Regional Investment Prospectus for national and global markets to profile the infrastructure and commercial investment opportunities in the region.
- ✓ Identify alternative funding sources, both institutional and offshore, to stimulate capital investment in the region.
- ✓ Aggressively market the investment opportunities in the 'game changer' projects and secure investment partners.

Priority B.

Maximising the value to the region of key economic infrastructure

- ✓ Establish Priority Investment Areas associated with game changer projects – each area offering development conditions directed primarily at facilitating appropriate commercial investment outcomes.
- ✓ Clarify and map the supply chains for each of the game changer projects and identify gaps and opportunities for local business supply and priorities for new investment.
- ✓ Establish and develop the research capability and reputation of the Sunshine Coast University Hospital, and profile this to targeted national and global markets.
- Work with telecommunications providers to deliver world-class broadband infrastructure and services, with a specific focus on 'game changer' project locations.
- In partnership with the Queensland Government, investigate a south-east Queensland airports strategy to better enable tourism and business connectivity to the region.



Case Study

Youi Insurance

In March 2018 Youi officially launched its new \$73 million global headquarters on the Sunshine Coast.

The state-of-the-art building, located in the Sippy Downs Technology Precinct, is home to more than 1,300 skilled workers and continues Youi's remarkable success story since setting up on the Sunshine Coast with just 30 employees in 2008. It is planned the global HQ will eventually house 3,000 employees.

youi.com.au

"The Sunshine Coast has given Youi access to a skilled and ambitious workforce that has been central to achieving our business objectives"

Frank Costigan CEO, Youi Insurance

youi.com.au

High-Value Industries

Priority A.

Attracting and developing high-value industries.

- ✔ Develop and aggressively implement industry and investment plans for each of the high-value industries – focusing on addressing impediments to growth, workforce requirements, supply chains, market opportunities and the identification of key investment targets.
- ✔ Develop a clear investment proposition and compelling marketing materials for each high-value industry to attract and generate new investment.

Priority B.

Providing a regulatory environment that encourages investment and growth.

- ✔ Establish the Enterprise Corridor in the Sunshine Coast Planning Scheme with development requirements in appropriately designated areas to be based on strong commercial investment principles.
- ✔ Identify and preserve future priority public transport corridors to connect to major business, tourism, education and population centres within the Enterprise Corridor.
- ✔ Ensure local regulatory fees and charges relating to development of high-value industries remain at the forefront of contestability with those of other regions in Queensland and the east coast of Australia.
- ✔ Ensure the regulatory settings outside the Enterprise Corridor do not inhibit or constrain investment in agribusiness and niche tourism and leisure experiences.

Priority C.

Promoting innovation, research and digital participation

- ✔ Develop and implement a Sunshine Coast Digital Economy and Participation Plan for business and industry.
- ✔ Support targeted professional mentoring, entrepreneur and angel investor programs.
- ✔ Develop innovation, best practice and business skills in existing and new regional businesses, including rural and hinterland businesses, to increase their sustainability.
- ✔ Increase links and collaborations between research institutions, business and industry in the region.

Pathway Key Outcomes

.01

Council's 15 Megawatt Solar Farm at Valdora has more than 57,000 Solar Panels and became operational in mid-2017.

.02

Council facilitated seven high-value industry taskforces made up of 50 industry leaders, meeting up to six times a year each as well as additional projects. A \$250,000 in-kind contribution per annum.

.03

Ten coworking, incubator and makerspaces, supporting small businesses and startups across the region, mapped alongside other business support programs on an online entrepreneurship ecosystem map.

.04

'Digital Sunshine Coast' launched as well as online Business Gateway and economy. id service.

.05

Marketing material including case studies, industry and investment brochures and factsheet produced.

.06

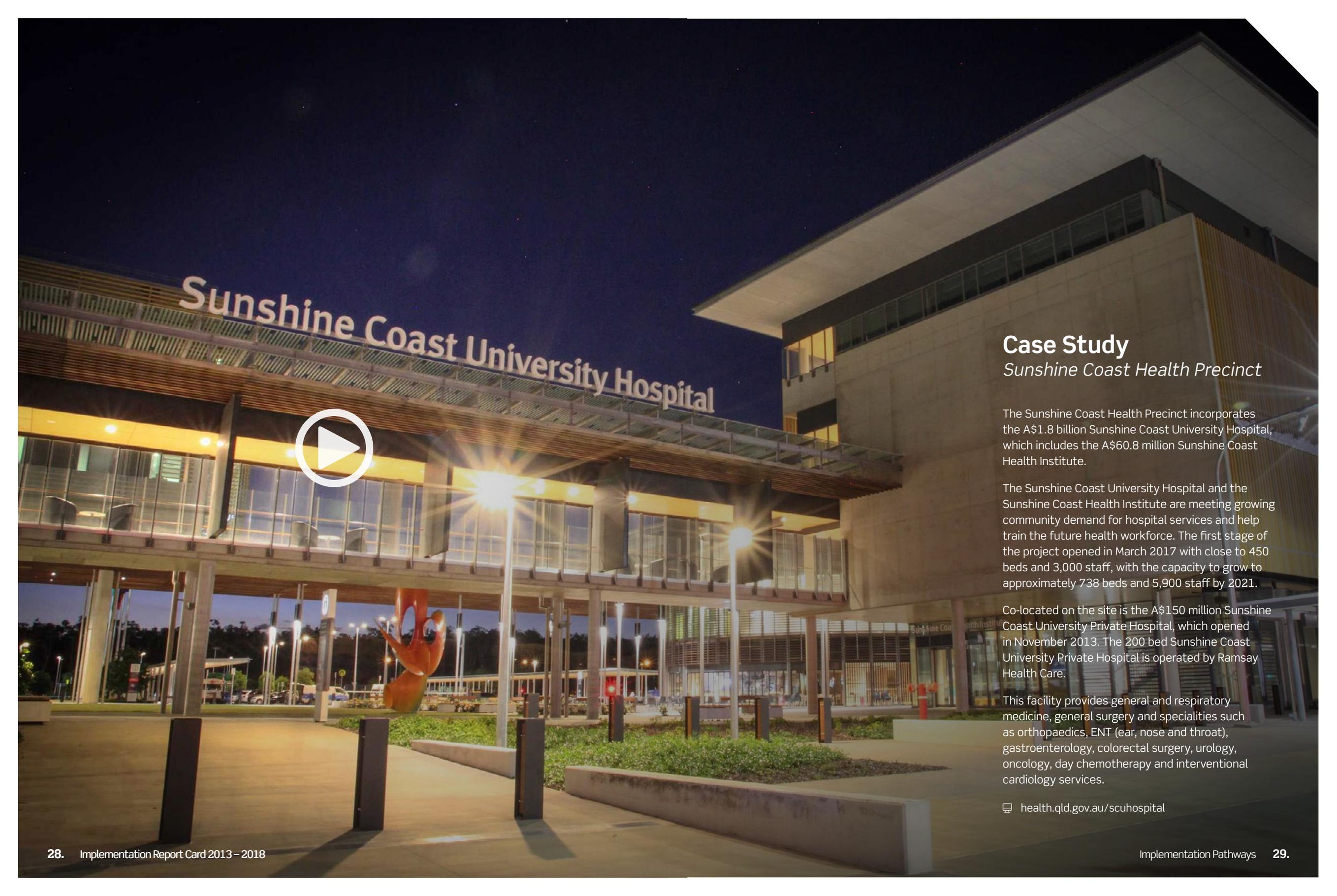
Enterprise Corridor and appropriate development provisions formally established in Planning Scheme.

.07

Consistently high regional business confidence has been measured annually.

.08

USC has experienced a 218% growth in research grant revenue in 2016 compared to 2013 levels.



Sunshine Coast University Hospital

Case Study

Sunshine Coast Health Precinct

The Sunshine Coast Health Precinct incorporates the A\$1.8 billion Sunshine Coast University Hospital, which includes the A\$60.8 million Sunshine Coast Health Institute.

The Sunshine Coast University Hospital and the Sunshine Coast Health Institute are meeting growing community demand for hospital services and help train the future health workforce. The first stage of the project opened in March 2017 with close to 450 beds and 3,000 staff, with the capacity to grow to approximately 738 beds and 5,900 staff by 2021.

Co-located on the site is the A\$150 million Sunshine Coast University Private Hospital, which opened in November 2013. The 200 bed Sunshine Coast University Private Hospital is operated by Ramsay Health Care.

This facility provides general and respiratory medicine, general surgery and specialities such as orthopaedics, ENT (ear, nose and throat), gastroenterology, colorectal surgery, urology, oncology, day chemotherapy and interventional cardiology services.

 health.qld.gov.au/scuhospital

Pathway Key Outcomes

.01

Worked closely with the Queensland and Australian Trade and Investment groups and conducted a number of successful trade missions to Asia and European investment missions.

.02

Export and Global Capability Program delivered to 78 companies and 100 individuals, with a 97% customer satisfaction rating and video testimonials.

.03

Annual briefing to Queensland Government Trade Commissioners and annual sponsorship of Queensland Export Awards.

.04

Sunshine Coast Export Network established to foster international connections with more than 500 participants.

.05

Six Export Development workshops and 11 networking events held for 900 attendees.

.06

Growth in exports from 13.6% to 17.9% in region.

.07

Sunshine Coast exporters, such as Coyo, are recognised for their capability and success.

.08

On average, the Sunshine Coast now annually hosts 15 inbound trade and investment delegations introduced by Austrade and Trade and Investment Queensland.

Local-to-Global Connections

Priority A.

Positioning the Sunshine Coast in key national and global markets as a competitive source of high-demand goods and services.



Create a regional network and inventory of existing international expertise and relationships to help forge stronger commercial linkages outside the region and leverage new business, trade, clients and public and private investment.



Establish an annual program of business and export missions – led by Council – to grow awareness of the region's products and services and investment opportunities.



Ensure Queensland Government Trade Commission have access to up to date information on the strengths and competitiveness of the Sunshine Coast.

Priority B.

Developing export-ready businesses and market responsive industries.



Support specific regional market development and export programs, and access to trade and investment networks, advice and opportunities.



Promote the capabilities, products and services of the region's export ready businesses and suppliers to key markets.



Pursue government support programs, and link with government agencies with an in-market presence in target markets, to assist Sunshine Coast businesses to enter new markets nationally and globally.

Case Study

University of the Sunshine Coast

Opening its doors in 1996, USC was the first greenfield public university to be established in Australia since the early 1970s. Today, with more than 13,400 enrolled students and a multi-campus status which spans from Brisbane through to the Sunshine Coast and Hervey Bay, the university is on track to reach projected enrolments of 20,000 students in 2020.

The university is consistently ranked among Australia's top universities for student experience. Graduates rate the university's teaching quality with five stars, the only Queensland university to maintain this rating for ten years in a row.

The university completed an A\$81 million expansion in 2015, allowing the campus to cater for a larger student population to meet the growing workforce demands of the Sunshine Coast. USC contributes around \$350m per year to the local economy through student expenditure and input from the university, and the value of research. This expenditure and connection to the local community includes the upgrade of the USC sports stadium to 2000 seats to house the Sunshine Coast Lightning netball team, the region's first national league sporting franchise and national Championship winners for 2017.

The university undertakes research of international, national and local significance in areas such as aquaculture, regional sustainability and forestry. The university's international reputation for research is growing every year with 14 research fields now rated at, or above, world standard. In addition, strong partnerships have been forged with the Sunshine Coast Mind and Neuroscience Thompson Institute and the Sunshine Coast Health Institute.

 usc.edu.au

Investment in Talent & Skills

Priority A.

Attracting and retaining skilled workers to support the growth of high-value industries

-  Seek a commitment from the Federal Government to regularly monitor skills and labour shortages (and ensure workforce gaps and early solutions are identified) for high-value industries and 'game changer' projects.
-  Develop migration program options to enhance the skills and business needs of the region in conjunction with federal and state government agencies.
-  Leverage opportunities in Asia and other key markets to increase the intake of international students in tertiary, technical and secondary schools.

Priority B.

A regional education and training system geared to the demands of the new economy.

-  Implement the Regional Education and Training Project to ensure collaboration between the region's education and training sectors to improve educational access, relevancy and outcomes in support of a future skilled workforce.
-  Develop skills and training programs through education providers and enterprise skills initiatives, designed to meet projected industry skills shortage needs.
-  Raise awareness in the middle phase of schooling (Years 8-10) of local career options and associated skills requirements.

Pathway Key Outcomes

.01

Future Careers 2025 Expos engaged and informed local students on the future education/training opportunities required to meet future job options.

.02

Education Sunshine Coast established and incorporated as the peak body for advocacy and promotion for education in the region.

.03

Development and delivery of the Coder Dojo initiative and coding skills training through TAFE Qld.

.04

The Job Show event delivered in 2015 and 2016 to highlight current vacancies and training opportunities.

.05

Mayor's Telstra Technology Awards program delivered annually since 2016.

.06

Study Sunshine Coast program is being delivered to increase the number of international students and retain local students.

.07

#SCRIPT program provides more than \$1 million over 3 years to develop innovation and entrepreneurial activities.

.08

Enhancement of University of the Sunshine Coast (USC) MBA offering to target local needs.



Case Study

Myriad Festival 2017

Sunshine Coast Council participated in the 2017 Myriad Festival held in Brisbane. The festival brought together a number of key stakeholders in the broader innovation ecosystem, including innovators and researchers, venture capitalists and startup figures from Queensland and abroad.

Overall 2,700 participants gathered, including 40 Sunshine Coast-based businesses to learn more about key innovation and entrepreneurship initiatives. 10 Sunshine Coast startups were featured at the Council's kiosk, along with technology demonstrations for the upcoming Maroochydore CBD development. Following the festival, the Sunshine Coast hosted over 30 international speakers, investors and key innovation stakeholders (including representatives from Lyft, Slack, Tinder, Techstars and TechCrunch) who were connected with local businesses.

 myriad.live

Advancing Regional Innovation

The Sunshine Coast Regional Innovation Project Team (#SCRIPT) is a collaboration of local entrepreneurs, businesses, government stakeholders and community members dedicated to driving innovation and improving business capacity on the Sunshine Coast. #SCRIPT has secured \$1 million in funding through Advance Queensland and 26 collaborators from across the region, including Sunshine Coast Council, Noosa Council and RDA Sunshine Coast amongst others. Its purpose is to support projects which showcase excellence, accelerate new solutions and support entrepreneurs in turning their ideas into commercial realities.

 sunshinecoastinnovation.com.au



High-Value Industries

The seven high-value industries to drive the Sunshine Coast economy provide clear direction and focus for investment and for the REDS implementation activities.

These seven industries were chosen as they are expected to strengthen the economy, assist in the delivery of a number of game changer opportunities and provide a critical building block for the new economy. These industries are anticipated to generate an increased number of long-term, high paying jobs for the local community.

Additionally, the types of jobs created through the expansion of activities in these high-value industries, are likely to attract and build a highly skilled and knowledge based workforce. The following section is based on information provided by Sunshine Coast Council relating to some of the key outcomes from 2013-2018.

High-Value Industries

- *Agribusiness*
- *Aviation & Aerospace*
- *Clean Technologies*
- *Education & Research*
- *Health & Wellbeing*
- *Knowledge & Professional Services*
- *Tourism, Sport & Leisure*

N.B. Historic estimates for high-value industries were revised by AEC using the most recent Census of Population and Housing and other ABS data sets.



Knowledge & Professional Services High-Value Industry

“

For entrepreneurs and high growth digital businesses looking for a dynamic and highly competitive location, the Sunshine Coast is an obvious choice. Offering a range of business advantages including a growing economy, enhanced digital infrastructure makes it one of the best business incubators in Australia.

Mark Paddenburg

CEO, The Innovation Centre

innovationcentre.com.au

Economic Goals for Knowledge & Professional Services Industry 2013 - 2018

Knowledge & Service Goals	2014 Position (Actual)	2017 Position (Est.)
Gross Value-Add (Million)	\$2,892.20	\$2,983.50
Employment (Employees)	21,044	21,479
Exports (Millions)	\$838.80	\$873.70
Exports (%)	13.46%	13.88%
Average Annual Income	\$56,805	\$60,002

Source: AEC Group 2018

Key Industry Outcomes

Smart 21

award for the Sunshine Coast out of the 400 national applicants.

Level Up

Upskilling program assisted over 450 business people with digital productivity.

\$1m

awarded to the Sunshine Coast to drive innovation and create new jobs over 3 years.

\$80m

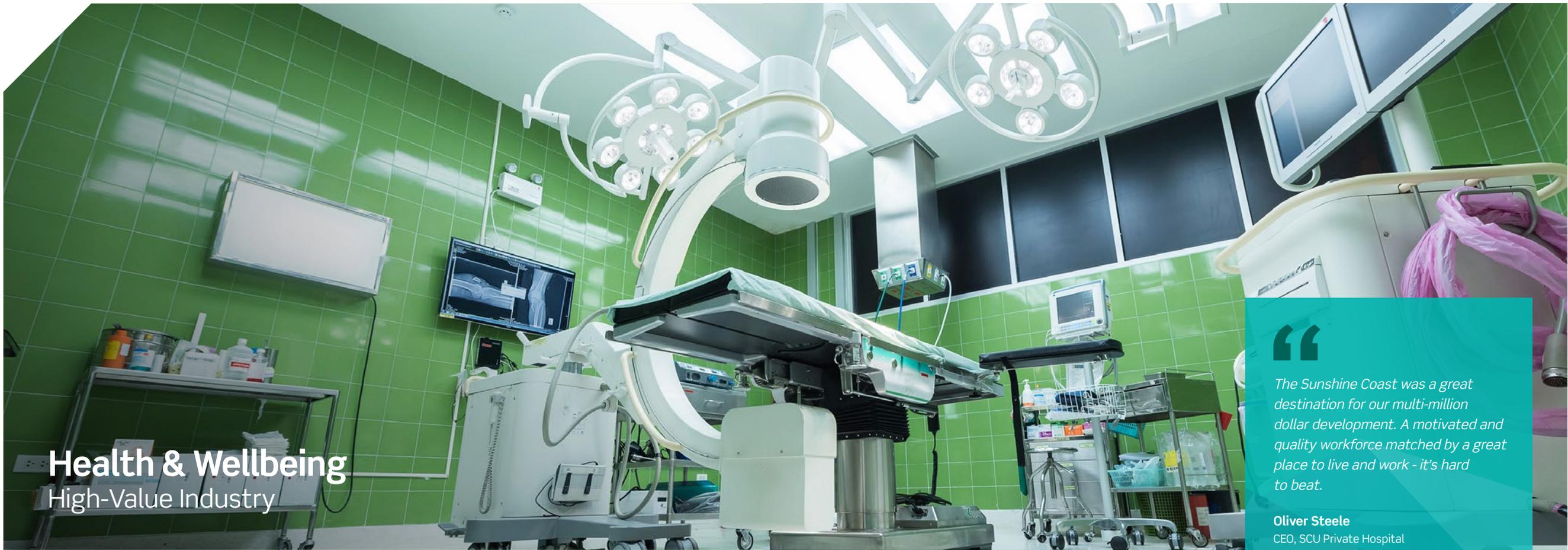
in capital expenditure secured and jobs growth through Youi, Auto & General and Stellar.

Smart Cities

Summit held in Caloundra was attended by 150 national and international delegates.

50+

students trained through the Mayor's Telstra Technology Awards and awarded over \$40k in prizes.



Health & Wellbeing High-Value Industry

“

The Sunshine Coast was a great destination for our multi-million dollar development. A motivated and quality workforce matched by a great place to live and work - it's hard to beat.

Oliver Steele

CEO, SCU Private Hospital

sunshinecoastuniversityprivate.com.au

Economic Goals for Health & Wellbeing Industry 2013 - 2018

Health & Wellbeing Goals	2014 Position (Actual)	2017 Position (Est.)
Gross Value-Add (Million)	\$1,559.20	\$2,088.60
Employment (Employees)	21,141	24,992
Exports (Millions)	\$493.90	\$668.70
Exports (%)	7.92%	10.63%
Average Annual Income	\$56,174	\$62,082

Source: AEC Group 2018

Key Industry Outcomes

\$1.8b

Sunshine Coast University Hospital (SCUH) opened its doors in April 2017.

\$183.5m

injected into the regional economy during the construction of the SCUH through The Workshop Program.

807

jobs created across 89 contractors during the 2 year 'The Workshop' program.

3,800

people currently employed at the SCUH with an expected 5,900 staff by 2021.

Medifarm

secured one of only two Medical Cannabis dual licences for cultivation and production in Australia.

267

major contracts created from an initial 10 major works packages thanks to Exemplar Health Group (Lend Lease).



Tourism, Sport & Leisure High-Value Industry

“

As a high-performance sports training location, the Sunshine Coast has proven to be a fantastic home base for the Sunshine Coast Lightning.

Danielle Smith

CEO, Sunshine Coast Lightning

sunshinecoastlightning.com.au

Economic Goals for Tourism, Sports & Leisure Industry 2013 - 2018

Tourism, Sport & Leisure Goals	2014 Position (Actual)	2017 Position (Est.)
Gross Value-Add (Million)	\$1,117.60	\$1,168.40
Employment (Employees)	18,711	20,634
Exports (Millions)	\$767.70	\$776.50
Exports (%)	12.32%	12.34%
Average Annual Income	\$36,202	\$38,392

Source: AEC Group 2018

Key Industry Outcomes

Glamping

facility, Rivershore Resort completed injecting \$5.56m into the region's economy annually.

10+

cruise ships arriving annually, injecting \$2-3m into the region's economy.

\$1.60m

injected into the economy through the 9 Commonwealth countries training for the games.

\$4.7m

Mary Cairncross Scenic Reserve Discovery Centre.

14%

average growth in domestic visitor numbers per annum between June 2013/17.

Lightning

netball the first elite national sports team established in the region generating \$23.5m impact.



Education & Research High-Value Industry



The University of the Sunshine Coast is a proud partner in the development and future growth of our region. The university's student population is growing faster than any other Queensland university and we have some of the most advanced spaces in the country.

Professor Greg Hill
Vice-Chancellor & President, USC

usc.edu.au

Economic Goals for Education & Research Industry 2013 - 2018

Education & Research Goals	2014 Position (Actual)	2017 Position (Est.)
Gross Value-Add (Million)	\$919.80	\$1,052.50
Employment (Employees)	11,773	12,586
Exports (Millions)	\$281.80	\$322.40
Exports (%)	4.52%	5.12%
Average Annual Income	\$56,743	\$61,325

Source: AEC Group 2018

Key Industry Outcomes

22,000

Study Sunshine Coast followers across various Social Media with regular engagement.

1,100+

students and educators attended the Future Careers Expo 2025 with focus on key industry.

4,500+

people attended the two Job Show Expos promoting 1,200 jobs and filling 400 openings.

TAFE Qld

supported and delivered coding courses to increase digital skills in the region.

\$81m

expansion of the University of the Sunshine Coast, USC aims for 20,000 students by 2020.



Agribusiness High-Value Industry

“

The Sunshine Coast's close proximity to Brisbane City and airports is convenient for international business requirements, yet the coast offers a closer link to our agricultural roots than any city would, reflecting our friendly business culture.

Andrew Eves-Brown
CEO, COYO
coyo.com

Economic Goals for Agribusiness Industry 2013 - 2018

Agribusiness Goals	2014 Position (Actual)	2017 Position (Est.)
Gross Value-Add (Million)	\$467.90	\$516.90
Employment (Employees)	4,439	4,480
Exports (Millions)	\$377.40	\$412.50
Exports (%)	6.05%	6.55%
Average Annual Income	\$41,454	\$44,725

Source: AEC Group 2018

Key Industry Outcomes

\$693m

is the current estimated value of the wider Agribusiness industry growing steadily.

FAN

The Food Agricultural Network (FAN) was established, a key outcome of the REDS.

13%

industry growth with dairy, horticulture, seafood and coffee leading growth.

\$400k

sales outcomes from the Sunshine Coast Showcase at Fine Food Australia 2017.

20+

industry development workshops held by FAN seeing 979 attendees engage.

530k

people reached through media engagement in 2017, with an economic value of \$27,000.

Clean Technologies

High-Value Industry

“

We enjoy a beautiful, diverse environment, dedicated staff and a network of innovative companies all striving to leave the world in a better state than how we found it.

Bob Cameron

Managing Director, ROCKCOTE

rockcote.com.au

Economic Goals for Clean Technologies Industry 2013 - 2018

Clean Technology Goals	2014 Position (Actual)	2017 Position (Est.)
Gross Value-Add (Million)	\$239.60	\$228.20
Employment (Employees)	1,662	1,494
Exports (Millions)	\$233.20	\$230.00
Exports (%)	3.74%	3.65%
Average Annual Income	\$50,781	\$54,101

N.B. The reduction in the Clean Technologies industry was a result in part of renewable energy policy changes in 2014/15 which affected investment confidence in this industry.

Source: AEC Group 2018

Key Industry Outcomes

\$7.5m

capital expenditure and 60 jobs created as a result of CSR and Ozzy Cranes development.

18

education workshops delivered by council to over 200 business attendees.

15MW

Sunshine Coast Solar Farm completed to offset energy needs of Sunshine Coast Council.

460

attendees attracted to the 'Cleantech Effect', a Council and Cleantech partnership.

Expo's

showcasing innovation, companies and investment in sustainables and transport.



Aviation & Aerospace

High-Value Industry

“

As HeliMods grew, I saw the opportunity to create a unique global business in an idyllic coastal location.

Will Shrapnel
 CEO, HeliMods
helimods.com

Economic Goals for Aviation & Aerospace Industry 2013 - 2018

Aviation & Aerospace Goals	2014 Position (Actual)	2017 Position (Est.)
Gross Value-Add (Million)	\$91.40	\$100.00
Employment (Employees)	472	480
Exports (Millions)	\$56.20	\$56.30
Exports (%)	0.90%	0.90%
Average Annual Income	\$70,269	\$74,525

Source: AEC Group 2018

Key Industry Outcomes

\$225m

John Holland Group awarded the construction contract for Sunshine Coast Airport expansion.

2,230

jobs to be created during the Sunshine Coast Airport upgrade by 2040.

Events

supported the Avalon International Airshow, RAAA National Convention and Rotortech.

\$2m

aviation facility expansion secured at the Sunshine Coast Airport to deliver 16 FTE positions.

Secured

Palisade Investment Partners as Council's operating partner for Sunshine Coast Airport facility, generating \$605m in expected revenue over the life of the lease.



Game Changer Project Infrastructure

Since 2013 large scale investments have been made across the Sunshine Coast helping to improve the functionality of the region's economy and support its current and future growth. These investments have primarily been aligned to:

- Game Changer Projects as identified in the REDS
- Other large scale infrastructure development
- High-Value Industries and their related activities

It is recognised that the summary provided here is not exhaustive of all the investment activity in the Sunshine Coast, but rather highlights some of the more significant investments made in recent times.



The new runway at Sunshine Coast Airport will create 2,200 jobs on the coast and return \$4.1 billion to our economy over the next 20 years.

Mayor Mark Jamieson
Sunshine Coast Council
sunshinecoast.qld.gov.au

Major Infrastructure Projects/Investments

Sunshine Coast Health Precinct

Incorporating the Sunshine Coast University Hospital and Sunshine Coast University Private Hospital, together with the adjacent Health Hub, is one of the largest health infrastructure precincts being developed in Australia and will contribute an estimated \$5b to the Sunshine Coast economy and a further estimated \$447m per year thereafter from operations.

Aura

Aura, formally known as Caloundra South, is a master planned community currently being established on 2,310 hectares south of the existing Caloundra urban area. When completed, it will provide approximately 20,000 dwellings to a population of around 50,000 people. The creation of Aura is estimated to deliver 20,000 jobs over the life of the project and expenditure of \$3b on civil and infrastructure works during development.

Harmony Housing Estate

The \$3b Palmview master planned community, known as Harmony, comprises three key development areas each providing a range of residential, commercial and retail opportunities.

Sunshine Coast Airport

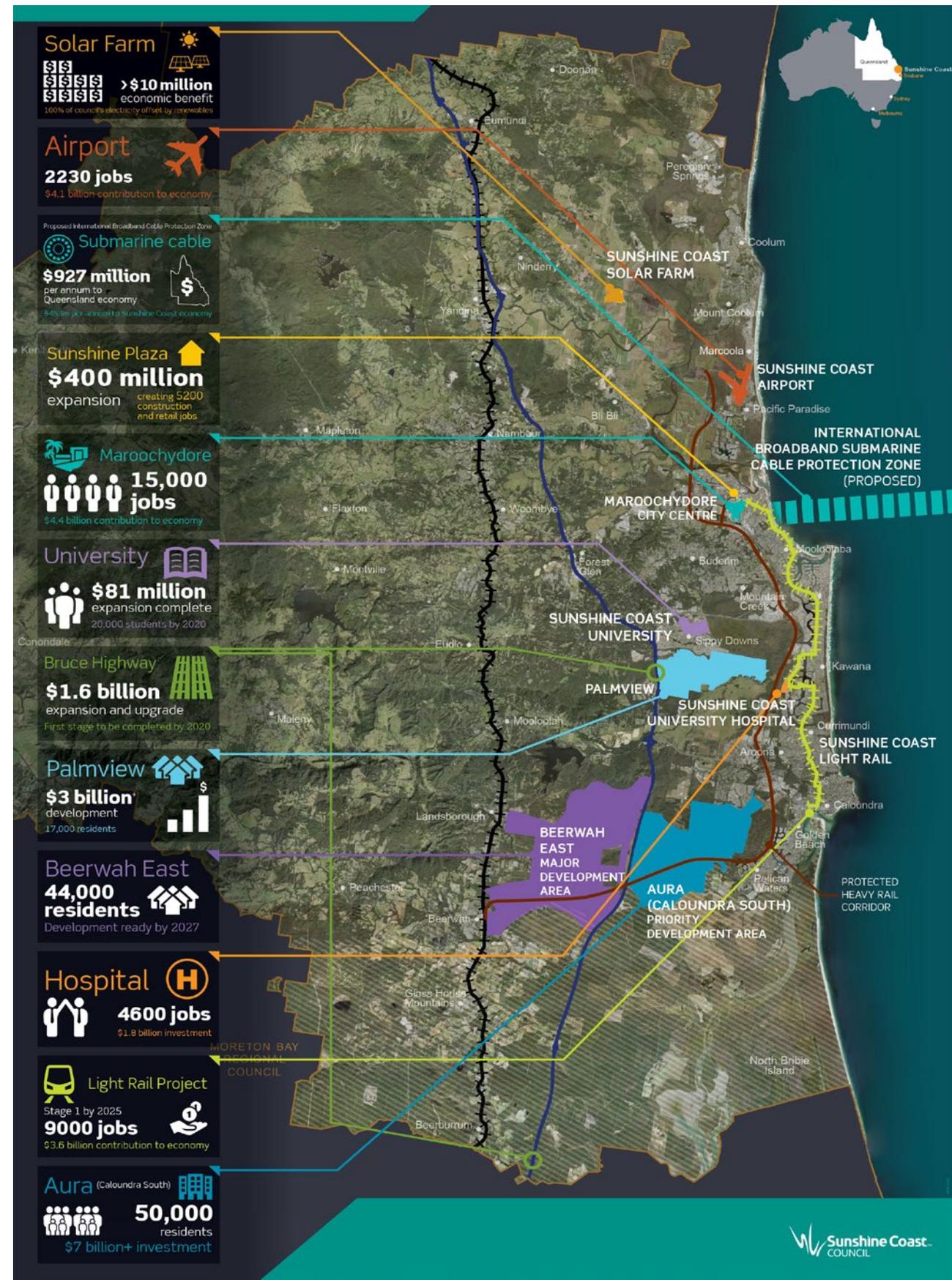
To be completed in 2020, this will be Australia's next international airport. The project includes the construction of a new 2,450 metre runway and increased apron facilities.

The airport expansion project will contribute \$4.1b to the Sunshine Coast economy to 2040 and generate 2,230 jobs. Palisade Investment Partners was confirmed in February 2017 as the Sunshine Coast Airport's commercial operating partner in

a deal worth \$605m. Under the deal, the airport land will continue to be owned by Sunshine Coast Council, with Palisade operating the asset under a 99-year lease.

Maroochydore City Centre

A new city centre with commercial, retail and residential investment opportunities, public facilities as well as being Australia's only greenfield CBD. The new city centre will provide an estimated \$4.4b boost to the Sunshine Coast economy over the life of the project and create approximately 15,000 jobs by 2025 and more than 30,000 jobs by 2040. Global infrastructure company announced in August 2017 that it would take a stake in the new Maroochydore City Centre in a deal with an end value of more than \$200m.



Other Projects and Investments

Sunshine Plaza Expansion

A \$400m expansion plan for the Plaza including a further 37,000m² to the Centre and a new David Jones Department Store, 1,500 additional car spaces, and a further 120 specialty stores.

Kawana Shopping World

A further extension has been announced to include Sunshine Coast's first Gold Class cinema and new dining and entertainment offers. This 6,000sqm complex will lead to more than 200 new retail jobs when complete.

Maroochy River Golf Club

A \$45m new club house and golf course opened in June 2015.

Bokarina Beach

The \$174m project will provide high quality, mixed-use residential, retail, tourism and recreational spaces. Development started in 2017 and the master plan for the 30ha area will connect Bokarina Beach with the Town Centre and Sunshine Coast Health Precinct.

Agribusiness

- The Sweetest Job Campaign website www.thesweetestjob.com.au was launched on 26 May 2016.
- Increased growth and attraction of agribusinesses - \$27m in capital expenditure and 230 new jobs, including Country Chef Desserts investment which will result in 49 new jobs and capital expenditure of \$8.45m.
- Epicurean, Freeze Dry Industries, Happy Snack

Company combined investment of \$14m capital expenditure and 47 new jobs.

- Imperial Hotel Eumundi reinvestment of \$3m and 5 new jobs opened in 2016.

Aviation & Aerospace

- Pacific Crown Helicopters was successfully assisted in securing and developing a new \$1.3m, 2000sqm expanded facility at Sunshine Coast Airport delivering 16 FTE positions.
- John Holland Group awarded a \$225m contract to construct a new 2,450m x 45m runway at Sunshine Coast Airport.

Clean Technologies

- Langs Building Supplies officially opened 25 September 2017 in Sunshine Coast Industrial Park, Caloundra. This \$20m investment will create 150 new jobs by end of 2018.
- BizFurn Express reinvestment in the region of \$45m capital expenditure is estimated to create a further 80 new jobs to their existing 120 jobs retained.
- Australia's first high-tech, automated underground waste collection system for a CBD being installed at Maroochy City Centre (\$22m) which will mean no wheely bins, no waste trucks and a 3-way waste inlet system.

Education & Research

- An \$81m expansion of the University of the Sunshine Coast which means new facilities delivering world-class teaching and research technologies, and supports increasing student numbers and course options.

Health & Wellbeing

- The new \$4m Private Emergency Department at the Buderim Private Hospital will open in May 2018 creating at least 20 new jobs.
- Capital investment from 2014 - 2016 in private hospitals on the Sunshine Coast is estimated to have contributed \$125m to the economy.

Knowledge Industries & Professional Services

- Increased investment and a further 290 jobs at Stellar call centre.
- Collaborative and dynamic startup community developed and supported by a number of incubators, accelerators, co-working spaces and business mentor providers.
- Atlas Aerometrex relocated their Queensland headquarters to Buderim with investment of \$100,000 and 14 new jobs.

Tourism, Sport & Leisure

- Attracted the Commonwealth Games teams of Scotland, Isle of Man and Wales to train and acclimatise on the Sunshine Coast prior to the 2018 games.
- Increased cruise ship visitation to the Sunshine Coast, with four cruise liners (P&O, Carnival, Seaborne and Azamara) with 17 ship visits

- scheduled for 2016/17. Each visit contributes approximately \$250,000 to the economy.
- Aussie World Expansion, Phase 1 complete \$5m capital expenditure and 40 new jobs, further Phase 2 estimated at \$55m capital expenditure and 190 jobs.





Sunshine Coast
Regional Economic Development Strategy
Implementation Report Card
2013–2018