RDA Gold Coast has taken due care in preparing this document. However, noting that data used for analyses have been provided by third parties, RDA Gold Coast gives no warranty to the accuracy, reliability, fitness for purpose, or otherwise of the information.

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Acknowledgements

Compilation of the 2013 Regional Profile was coordinated by Executive Officer, Ian Pritchard.

A special thanks to participants in a number of community consultation events, forums and other community engagement activities organised, or supported, by RDA Gold Coast over the past 12 months.

The RDA Gold Coast Committee consists of Craig Devlin, Colette McCool, Jevena O’Brien, Stephen Simpson, Prof Paul Burton, Anne Norton Knight, John Jones OAM, Vivienne Mallinson, Trina Hockley and Kerrie Young.
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This profile outlines a complex and fluctuating regional economy and provides a detailed overview of the Gold Coast regional priorities. The Regional Plan framework is underpinned by this body of research, the Regional Development Australia (RDA) Gold Coast has been working with a variety of business, government, community and environmental groups to identify the Gold Coast regional priorities.

In order to address the challenges and opportunities facing the region, Regional Development Australia (RDA) Gold Coast has been working with a variety of business, government, community and environmental groups to identify the Gold Coast regional priorities.

The framework created identifies five regional priorities; this has been identified in the Regional Plan as regional leadership. A collaborative, purpose driven approach is required to overcome the challenges facing the region and address these priorities; this has been identified in the Regional Plan as regional leadership.

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GOLD COAST REGIONAL PLAN

The Gold Coast is a diverse and robust regional community relatively dependent upon traditional economic sectors such as tourism, construction and retail.

In order to address the challenges and opportunities facing the region, Regional Development Australia (RDA) Gold Coast has been working with a variety of business, government, community and environmental groups to identify the Gold Coast regional priorities.

These priorities form the basis of the 2013-2016 Regional Plan. The framework created identifies five significant priorities for the region: economic diversity, investment and infrastructure, digital innovation, workforce and sustainable communities.

A collaborative, purpose driven approach is required to overcome the challenges facing the region and address these priorities; this has been identified in the Regional Plan as regional leadership.

The Regional Plan framework is underpinned by this body of research, the 2013 Regional Profile report.

This profile outlines a complex and fluctuating regional economy and provides a detailed overview of key economic, social and environmental metrics over time.

The 2013-2016 Regional Plan can be viewed online at www.rdagoldcoast.org.au
ABOUT RDA GOLD COAST

Regional Development Australia (RDA) Gold Coast is a partnership between all three levels of government and aims to use their combined resources more efficiently to develop the Gold Coast community, strengthen business growth, and enhance community development and engagement.

It provides strategic and targeted responses to local issues and builds partnerships between governments, regional development organisations, the private sector and other regional stakeholders. RDA Gold Coast provides additional support through networking opportunities, partnership building, project planning, development and regional advocacy.

RDA Gold Coast is a not-for-profit community organisation led by local leaders from government, business and the community. Committee members are all volunteers and have been ministerially appointed. RDA Gold Coast is a strong advocate for the region and, as a driver of change, has a pivotal role in ensuring the region’s long-term sustainability.

HOW TO GET INVOLVED WITH RDA GOLD COAST

PARTNERSHIP PROJECTS
RDA Gold Coast leverages its own resources, available funding opportunities and the capacity of existing organisations to identify potential areas to diversify the regional economy through partnership projects which are aligned with the Regional Plan’s priority areas.

The committee welcomes community, business and government involvement. Please contact RDA Gold Coast to discuss your project. Phone (07) 5583 5095 or email admin@rdagoldcoast.org.au

COMMITTEE MEMBERSHIP
RDA committee members are local people developing local solutions to local issues. They build partnerships to develop strategies and deliver sustainable infrastructure and services to their regions.

As the regional development voice of their communities, the committee:

➢ consults and engages with communities
➢ promotes and participates in regional programs and initiatives
➢ provides information and advice on their region to all levels of government, and
➢ supports informed regional planning

For more information about RDA committees visit http://rda.gov.au/join-your-rda

REGIONAL DEVELOPMENT AUSTRALIA FUND (RDAF)
**GOLD COAST REGIONAL PROFILE**

The **2013 Regional Profile** (which forms part of the 2013-2016 Regional Plan) provides an in-depth overview of the people, their lifestyles, employment, businesses, and the threats and opportunities within the Gold Coast region, using latest data from a variety of sources including the Australian Bureau of Statistics (ABS).

It examines human capital, economic, environmental, social, and population factors, accessing markets and comparative advantages of the region.

Key statistics for the Gold Coast are summarised in the table below:

<table>
<thead>
<tr>
<th>Factor</th>
<th>Gold Coast</th>
<th>Sunshine Coast</th>
<th>Hunter Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population 2012</td>
<td>526,173</td>
<td>324,266</td>
<td>653,346</td>
</tr>
<tr>
<td>Population growth 2011-2012</td>
<td>2.13%</td>
<td>1.88%</td>
<td>1.24%</td>
</tr>
<tr>
<td>Population increase 2011-2012</td>
<td>10,971</td>
<td>5,987</td>
<td>8,021</td>
</tr>
<tr>
<td>Median Age (2011)</td>
<td>37</td>
<td>42</td>
<td>40</td>
</tr>
<tr>
<td>Employment June 2013</td>
<td>303,100</td>
<td>161,400</td>
<td>323,800</td>
</tr>
<tr>
<td>Unemployment June 2013</td>
<td>6.50%</td>
<td>5.90%</td>
<td>5.90%</td>
</tr>
<tr>
<td>Volunteering 2011 (% of population)</td>
<td>12.20%</td>
<td>16.40%</td>
<td>13.20%</td>
</tr>
<tr>
<td>% Managers/Professionals 2011</td>
<td>30.90%</td>
<td>31.80%</td>
<td>30.10%</td>
</tr>
<tr>
<td>Participation in university education 2011 (15-24 year olds)</td>
<td>18.80%</td>
<td>13.50%</td>
<td>14.70%</td>
</tr>
<tr>
<td>Economy size 2011/12</td>
<td>$19,575.3 million</td>
<td>$12,129.4 million</td>
<td>$36,166 million</td>
</tr>
<tr>
<td>Number of businesses 2012</td>
<td>60,015</td>
<td>35,528</td>
<td>70,028</td>
</tr>
<tr>
<td>Tourism visitors Dec 2012</td>
<td>11.9 million</td>
<td>8.7 million</td>
<td>7.6 million</td>
</tr>
<tr>
<td>Average new house value (2012)</td>
<td>$299,341</td>
<td>$291,548</td>
<td>$263,809</td>
</tr>
<tr>
<td>Average water use per person per day (September 2013)</td>
<td>175 litres</td>
<td>190 litres</td>
<td>198 litres</td>
</tr>
<tr>
<td>Number of households with internet</td>
<td>77.40%</td>
<td>77.70%</td>
<td>71.10%</td>
</tr>
<tr>
<td>% use motor vehicle as main method of travel to work (driver or passenger)</td>
<td>73.20%</td>
<td>80.00%</td>
<td>72.10%</td>
</tr>
</tbody>
</table>

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

POPULATION

A key feature of the region has been its consistently strong population increases. Between 2001 and 2012 the population has grown 38.6%, and added 146,494 people, an increase of 3.0% per annum over this time. Several factors have driven these increases, including the relaxed lifestyle, favourable climate and more than 80km of coastline.

In the period from 2001 to 2012, the Gold Coast’s share of Queensland population growth averaged 14.7%, peaking in 2002 at 18.3% of Queensland’s growth, and reaching its lowest share in 2012 with 12.4%. The reasons for the slowdown include the overall weaker economy, the soft tourism market which is a critical industry to the Gold Coast, and infrastructure bottlenecks. It is still the case, however, that the Gold Coast has been one of the fastest growing regions in Australia.

In 2013 RDA Gold Coast commissioned Bernard Salt of KPMG to undertake an analysis of the long distance commuter workforce. At the time of the 2011 Census, the Gold Coast had emerged as having Australia’s leading commuter flow with 26,000 workers making the daily trip from the Gold Coast to Brisbane. The second largest flow at this time was 18,000 workers travelling daily from Wollongong to Sydney.

The reasons for the significant flow of daily workers from the Gold Coast to Brisbane is a combination of workers choosing the lifestyle option of living on the Gold Coast and a shortage of employment opportunities on the Gold Coast.

1 Analysis of the Gold Coast Long Distance Commuter Workforce. Regional Development Australia – Gold Coast. August 2013

CHART 1 GOLD COAST POPULATION LEVELS AND INCREASES, 2001 TO 2011

Source: ABS 3218.0 Regional Population Growth, 30 August 2013.

The charts above reflect this increase. Since 2002 the growth rate in absolute numbers of people has increased as more people have been attracted to the region. Even since the GFC started in 2008, the Gold Coast has added 59,233 people between 2008 and 2012.
Chart 2 illustrates the change in age cohorts that has occurred between the last two census periods. In the period between 2006 and 2011 there has been significant growth in the 60 to 74 age cohorts.
In comparison to the Queensland average, the Gold Coast labour force has a relatively high proportion of people that are employed on a part-time basis, this is reflective of the large number of people employed in the ‘Retail Trade’ and ‘Accommodation & Food Services’ industry sectors. The above graph is based on “Place of Usual Residence” data from the 2011 Population and Housing Census.

---

### CHART 4 REGIONAL EMPLOYMENT & UNEMPLOYMENT

**Gold Coast Regional Employment**

- **Unsmoothed - Labour Force (Number)**
- **Smoothed - Labour Force (Number)**

**Gold Coast Regional Unemployment**

- **Unsmoothed - Unemployment Rate (%)**
- **Smoothed - Unemployment Rate (%)**

*Source: DEEWR, Small Area Labour Markets Australia*

---

1 The Labour Force variable records a person’s labour force status for the week prior to Census Night. People aged 15 years and over who are neither employed nor unemployed are classified as not in the labour force. This includes people who are retired, pensioners and people engaged solely in home duties. Information about employment type is important for a wide range of social and economic policy and planning purposes. The Census of Population and Housing and the Labour Force Survey (LFS) both measure information about the labour market activity of people aged 15 years and over. The Census provides a five yearly snapshot with social-economic data at a small area level, while the Labour Force Survey is based on a monthly household survey. This variable is applicable to persons aged 15 years and over. It includes a ‘Not applicable’ category, which comprises persons aged under 15 years.
Charts 4 and 5, Regional Employment and Unemployment\(^2\), shows the Gold Coast has not been immune to the impacts of the GFC. During this time employment has levelled, while unemployment has trended up.

**CHART 5 REGIONAL UNEMPLOYMENT RATES**

Unemployment Rates*

- Brisbane City Inner Ring
- West Moreton
- Darling Downs-South West
- Brisbane City Outer Ring
- Mackay-Fitzroy-Central West
- Ipswich City
- North Brisbane SD Balance
- Australia
- Queensland
- Mnorthern-Nort West
- Sunshine Coast
- South & East Brisbane SD Balance
- Gold Coast
- Wide-Bay Burnett
- Far North

*12 month averages Labour Force Survey data to Nov 2011
Source: ABS Regional Labour Force Data

---

\(^2\) The Small Area Labour Markets (SALM) data has been compiled by the Department of Education, Employment and Workplace Relations (DEEWR). SALM data incorporates three primary datasets:

1. Centrelink data on people in receipt of Newstart or Youth Allowance (Other), by postcode (not including people in receipt of the Community Development Employment Projects Participant Supplement)
2. ABS Labour Force Survey data at the ABS Labour Force Region level
3. ABS Census of Population and Housing labour force data at the Statistical Local Area level.

The estimates presented have been smoothed by DEEWR using a four-quarter average to minimise the variability inherent in the estimates at the Statistical Local Area level.
**Youth Unemployment**

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

**Chart 6 Youth Employment**

<table>
<thead>
<tr>
<th>Industry Sector</th>
<th>Jobs</th>
<th>% Gold Coast (C)</th>
<th>% Work in QLD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Trade</td>
<td>6,910</td>
<td>26.20%</td>
<td>22.00%</td>
</tr>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>6,658</td>
<td>25.30%</td>
<td>18.40%</td>
</tr>
<tr>
<td>Health Care &amp; Social Assistance</td>
<td>1,826</td>
<td>6.90%</td>
<td>7.60%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>15,394</td>
<td>58.50%</td>
<td>48.10%</td>
</tr>
</tbody>
</table>

Source: REMPLAN Economy Workforce

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

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

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

**Volunteers**

The proportion of Gold Coast residents who spent time doing unpaid voluntary work through an organisation or group in the twelve months prior to Census Night was marginally lower that the State average, with 12.2% of the population undertaking some form of volunteering, compared to 14.9% of the Queensland population. This is a reflection of the Coast’s age profile (see Chart 2), as older people who are no longer in the workforce are more likely to volunteer, such as the 70 years and older cohorts.

**Chart 7 Percentage of Population that Volunteer, 2011**

**Source:** REMPLAN Community and ABS 2011 Census

% of Volunteer Workers by LGA, 2011

- Gold Coast (C): 12.16
- Logan (C): 11.1
- Toowoomba (R): 16.75
- Queensland: 14.9
INDUSTRY AND OCCUPATION

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

In comparison to the State averages, the Gold Coast has a higher representation for ‘Retail Trade’ and ‘Accommodation & Food Services’ which is reflective of population growth and tourism being major drivers of the Gold Coast region.

The proportion of the workforce in ‘Public Administration & Safety’ and ‘Transport & Warehousing’ is considerably higher across the State than the Gold Coast and may provide potential opportunities given the Gold Coast’s strategic location to transport infrastructure and the States capital, Brisbane.

CHART 8 GOLD COAST & QUEENSLAND EMPLOYMENT BY INDUSTRY
The following chart illustrates the change in employment by industry profile for the Gold Coast region over the five years from 2006 to 2011. The data is for those whose ‘place of usual residence’ was the Gold Coast.

The most significant change has been in the ‘Health Care & Social Assistance’ sector where there were an additional 5,858 jobs generated in the region. This was followed by the ‘Professional, Scientific and Technical Services’ (+3,041 jobs) and ‘Education & Training’ (+3,014 jobs).

The most significant decrease was for the ‘Manufacturing’ sector (-3,565 jobs).

CHART 9 GOLD COAST CHANGE IN EMPLOYMENT BY INDUSTRY 2006 TO 2011
Of the 182,274 jobs located within the Gold Coast region, 161,233 people also live on the Gold Coast, 6,310 are from over the border in the Tweed Local Government Area, 6,280 people travel down from Logan (C) and 3,728 from Brisbane (C).
MINING

RDA Gold Coast recently commissioned Bernard Salt of KPMG to undertake an analysis of the long distance commuter workforce, including FIFO (Fly In Fly Out) workers working in the resources sector.

Employment in the mining industry in Queensland hit a record high of 76,000 in May 2013 after experiencing three steady quarters of growth. This is in contrast to the trend experienced in the mining industry nationally which declined by 16,000 workers over the 12 months to May 2013. Queensland is the only state that has recorded consistent and steady growth in mining industry employment since August 2012. The Gold Coast region was home to 6,700 long distance commuters in 2011 as a subset of the region’s overall workforce of 254,000. In comparison, Adelaide had a resident long distance commuter workforce of 6,800 with a workforce of 548,000. The Gold Coast is thus able to support a resident long distance workforce the same size as Adelaide’s with less than half the total workforce.

The growth of long distance commuting workers residing in the Gold Coast region and travelling to the Bowen Basin was approximately 45% the size of Brisbane’s corresponding growth between 2006 and 2011. Similarly, Gold Coast accounted for 35% of Brisbane’s increase in workers travelling to Surat Basin.

Based on the 2011 Census, there were 1,652 people working in the ‘Mining’ sector who live on the Gold Coast, this is an increase from 729 people in 2006. The 1,652 jobs contribute 0.7% of Gold Coast’s total employment.

1 Analysis of the Gold Coast Long Distance Commuter Workforce. Regional Development Australia Gold Coast, August 2013

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The Mining Division includes units that mainly extract naturally occurring mineral solids, such as coal and ores; liquid minerals, such as crude petroleum; and gases, such as natural gas. The term mining is used in the broad sense to include underground or open cut mining; dredging; quarrying; well operations or evaporation pans; recovery from ore dumps or tailings as well as beneficiation activities (i.e. preparing, including crushing, screening, washing and flotation) and other preparation work customarily performed at the mine site, or as a part of mining activity.

The Mining Division distinguishes two basic activities: mine operation and mining support activities. Mine operation includes units operating mines, quarries, or oil and gas wells on their own account or for others on a contract or fee basis, as well as mining sites under development. Mining support activities include units that perform mining services on a contract or fee basis, and exploration (except geophysical surveying).
The primary occupation of those working in the ‘Mining’ sector that live on the Gold Coast is ‘Machinery Operators & Drivers’ (32.9%) followed by ‘Technicians and Trades Workers’ (19.4%).

43.1% of ‘Mining’ sector workers living on the gold Coast report an average weekly income of ‘$2,000 or more’ (the highest grouping), and 19.1% have a weekly income of $1,500-$1,999.
Output data represents the gross revenue generated by businesses /organisations in each of the industry sectors in a defined region.

The output generated by the Gold Coast regional economy is estimated at $44,016.708 million. ‘Manufacturing’ contributes $9,098.034 million, ‘Construction’ contributes $5,145.167 million followed by ‘Rental, Hiring & Real Estate Services’ $5,067.281 million.

The ‘Manufacturing’ industry sector is a large sector contributing 20.7% of total Gold Coast regional output. Chart 13 provides a breakdown of the ‘manufacturing’ sector into sub-sectors (this can be further broken down) to provide an understanding of the industry sub-sectors that are driving the regional ‘manufacturing’ output.

‘Metal & Metal Product’ makes the largest contribution ($1,898.914 million) followed by ‘Transport Equipment & Parts’ ($1,535.293 million) and ‘Technical Equipment & Appliances’ ($1,379.282 million).
Regional Exports data represents the value of goods and services exported outside of the region that have been generated by industry sectors within the region. Chart 12 depicts the contribution to total regional exports generated by each of the industry sectors ranked from highest to lowest.

The total regional export estimate for Gold Coast (C) is $9,727.589 million. The ‘Manufacturing’ sector has the highest contribution to regional exports ($3,558.740 million) followed by ‘Accommodation & Food Services’ ($1,092.567 million) and ‘Rental, Hiring & Real Estate Services’ ($941.274 million).

**REGIONAL IMPORTS BY INDUSTRY**

Regional Imports data represents the value of goods and services imported into the region by businesses / organisations in each of the industry sectors. Another way of defining imports is as an outflow of money from the region.

The total regional import estimate for Gold Coast (C) is $9,258.208 million. The ‘Manufacturing’ sector has the highest level of regional imports of $4,395.236 million, followed by ‘Accommodation & Food Services’ ($703.318 million) and ‘Construction’ sector ($690.843 million).

**CHART 16 GOLD COAST REGIONAL IMPORTS**

Imports reflect demand in the region’s economy for goods and services not supplied locally and represent ‘Gaps’ in local supply chains. Many of the goods and services imported from overseas are priced at a level making substitution with local supply unlikely and in instances, unfeasible. However, imports from the rest of Australia may indicate opportunities for import replacement, increased value-adding and supply chain development in your region. Supply of these goods and services is currently feasible in the Australian context and may provide a guide to realistic, high value strategic opportunities to further develop the local economy. While the total replacement of imports with local production is improbable, it may be possible to capture a proportion of this escape expenditure.
VALUE-ADDED BY INDUSTRY

Value-Added data represents the marginal economic value that is added by each industry sector in a defined region.

Value-Added can be calculated by subtracting local expenditure and expenditure on regional imports from the output generated by an industry sector, or alternatively, by adding the wages and salaries paid to local employees, the gross operating surplus and taxes on products and production.

Value-Added by industry sector is the major element in the calculation of Gross Regional Product.

The total value-added by the Gold Coast economy is estimated at $19,575.332 million. ‘Rental, Hiring & Real Estate Services’ contributes the highest value-added ($3,030.288 million) followed by ‘Manufacturing’ ($2,034.172 million) and ‘Financial & Insurance Services’ ($1,796.933 million).

CHART 17 VALUE-ADDED
GOLD COAST TOURISM

The tourism industry is an important contributor to the Australian economy. However, the System of National Accounts (SNA) does not capture tourism as a single industry, because of tourism’s diverse products and services. Consequently, Tourism Satellite Accounts (TSA’s) are used to supplement the SNA by measuring the economic contribution of tourism.

The TSA estimates the worth of the tourism sector by combining the contributions of various goods and services across the economy. This then makes it possible to compare the economic contribution of the tourism industry, and its individual sectors, to conventional industries.

(Source: State Tourism Satellite Accounts 2010/11, TRA).

TOURISM OUTPUT

The estimated output generated by tourism for each industry sector has been deducted and consolidated into a separate tourism sector. The total output estimate for the Gold Coast region is $44,016.708 million, with Tourism contributing $3,195.840 million (7.3%).

CHART 18 GOLD COAST OUTPUT – INCLUDING TOURISM
OUTPUT ATTRIBUTABLE TO TOURISM

Tourism output has been estimated to be $3,195.840 million, the following chart shows the gross revenue generated by businesses and organisations in Gold Coast to service demand generated by tourists to the area.

CHART 19 OUTPUT ATTRIBUTABLE TOURISM

EMPLOYMENT ATTRIBUTABLE TO TOURISM

The total tourism related employment estimate for Gold Coast is 20,553 jobs. The following chart shows the number of jobs in each industry sector which service demand generated by tourists to the area.

CHART 20 EMPLOYMENT ATTRIBUTABLE TOURISM
MANUFACTURING
The ‘Manufacturing’ industry sector on the Gold Coast is one of the largest employing sectors. It is estimated that at June 2012 there were 25,666 people employed in this sector, an increase of 7,911 since 2002 (44.6%). This sector can be further broken down into a number of sub-sectors, with the ‘Food Product Manufacturing’ sub-sector having the largest number of ‘Manufacturing’ workers, estimated at 3,943 people, followed by the ‘Transport Equipment Manufacturing’ sub-sector employing 3,464 people.

CHART 21 GOLD COAST MANUFACTURING EMPLOYMENT, JUNE 2012

CONSTRUCTION
Construction is one of the major industries on the Gold Coast, with the current employment estimate being 28,828. Although this is below the peak from earlier years, it has remained fairly constant due to the region’s continued population expansion. Between 2002-2012 this sector has increased by 50.3%.

CHART 22 GOLD COAST CONSTRUCTION EMPLOYMENT JUNE 2012
ACCOMMODATION AND FOOD SERVICES

The number of people employed in the ‘Accommodation and Food Services’ sector has been relatively consistent from 21,653 in June 2002 to 21,899 in June 2012.

However, there was a peak in the number of people employed in this sector of 26,514 in 2009, with the increase occurring during the period of the GFC, considered to be a reflection of an increase in the number of part-time and casual jobs, as well as people entering this sector as an employment option during the GFC.

CHART 23 GOLD COAST ACCOMMODATION & FOOD SERVICES EMPLOYMENT JUNE 2012
HEALTH CARE AND SOCIAL ASSISTANCE SERVICES

‘Health Care and Social Assistance’ is one of the largest sectors on the Gold Coast with 25,196 people employed in this sector.

Although there appears to have been a decrease in the number of workers in June 2012, the overall growth trend is strong and is expected to continue with the aging demographic on the Gold Coast.

Since 2002 this sector has increased by 9,079 (56.3%) on the Gold Coast.

CHART 24 GOLD COAST HEALTH CARE & SOCIAL ASSISTANCE SERVICES EMPLOYMENT JUNE 2012

[Chart showing employment trends for Health Care and Social Assistance services from 2002 to 2012]

Source: GCCC Economic Profile
EDUCATION AND TRAINING SERVICES

The ‘Education and Training Services’ sector has emerged as one of the largest sectors on the Gold Coast with 17,119 people employed.

Over the period from 2002 to 2012, the overall growth trend has been strong.

The chart below shows that numbers have been steadily increasing. Since 2002 this sector has increased by 5,408 (46.2%) on the Gold Coast.

CHART 25 GOLD COAST EDUCATION & TRAINING EMPLOYMENT JUNE 2012

Source: GCCC Economic Profile
OCCUPATIONS AND QUALIFICATIONS

The workforce’s skill level is increasing, with professionals and managers accounting for a higher share of the overall Gold Coast workforce.

Based on the 2011 Census, 31% of the region’s workforce (people working in the region) was classified by the ABS as either ‘Managers’ or ‘Professionals’, an increase from 28.7% from the 2006 Census.

In 2011, ‘Professionals’ accounted for the highest proportion of occupations, 18.5%, an increase from 15.9% in 2006.

‘Technicians and Trade Workers’ accounted for the second highest proportion in 2011 (13.4%), a decrease from the 14.7% in 2006.

CHART 26 GOLD COAST OCCUPATION PROFILE 2006 & 2011

The above chart has been further broken down in Chart 27 to demonstrate the change by Occupation sub-sector, highlighting the increase in workforce numbers particularly for ‘Health Professionals’, ‘Education Professionals’ and ‘Specialist Managers’.
The above graph highlights the change in occupation between 2006 and 2011. (Data has been illustrated for changes that were greater than 400 workers over the period).
EMPLOYMENT OUTLOOK FOR THE REGION

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

CHART 28 REGIONAL EMPLOYMENT PROJECTIONS, 2011 TO 2031

The workforce on the Gold Coast is forecast to expand by 50.6% from 236,395 in 2011 to 355,895 by 2031. Over the same period the population of the Gold Coast is projected to increase by 46.7%, compared to 43% projected increase for Queensland\(^4\). As a share of total Queensland employment, the Gold Coast region has recorded a gradual rise over the past decade from 10.6% in 2001 to 11.4% in 2011.

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

At the industry level (as shown in the following chart), by 2031, the ‘Health Care and Social Assistance’; ‘Retail Trade’ and ‘Accommodation and Food Services’ industry sectors are projected to account for the largest employing industries on the Gold Coast.

Between 2011 and 2031 the largest growth sectors include ‘Health Care and Social Assistance’, ‘Mining’, ‘Financial and Insurance Services’ and ‘Finance and Insurance Services’.

The ‘Agriculture, Forestry and Fishing’ and ‘Manufacturing’ industry sectors are likely to see reductions in the number of jobs on the Gold Coast.

Developing and attracting the appropriate skills and educated workforce and managing the redeployment of workers between these industry sectors will not only be a regional issue, but an issue facing Queensland in general. In a workforce planning study and forecast workforce change report conducted by Deloitte Access Economics for RDA Sunshine Coast, the report finds that due to the ageing of the population and therefore retirement from the workforce, that Queensland overall will see a significant shortage of labour from about 2020.

The growth in employment across service-related industries is expected to generate a strong demand for professional and skilled workers in the Gold Coast Region over the next two decades.

Source: SGS Economics & Planning, July 2013
Education is one of the key drivers of the region’s social, cultural and economic development and is recognised as a fundamental human right. Formal education on the Gold Coast is primarily provided through government and non-government schools, tertiary education, including TAFE, and private and public universities and campuses, as well as various business and training colleges. The Gold Coast has close to 100 state and independent schools, four universities and six TAFE campuses contributing towards educational opportunities in the region.

Griffith University, Bond University, Southern Cross University and Central Queensland University each have a campus on the Gold Coast which collectively attracts over 25,519 full and part time students, including over 6,800 overseas students. Additionally, Gold Coast TAFE attracts close to 17,000 students, including over 700 overseas students.

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

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

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

CHART 31 GOLD COAST QUALIFICATIONS 2006 TO 2011

As the above chart shows, over the next 20 years, the demand for ‘Community and Personal Service Workers’, ‘Sales Workers’ and ‘Professionals’ is expected to be particularly strong over the period, supported by ‘Clerical and Administrative’ workers and growth in ‘Managers’ and ‘Labourers’.

The Gold Coast has a diverse economic base, with the projected employment growth for the region is expected to increase by 50.6% between 2011 and 2031, this growth will be heavily driven by population growth and the tourism sector. The growth to meet the continued demand from these population serving sectors will continue to be major drivers for the region.

EMPLOYMENT OPPORTUNITIES

The Gold Coast requires suitable employment to be generated to accommodate the demand for employment during the key stages of the lifecycle, including key employment growth areas for families.

The types of jobs created will also need to be attractive for these segments, i.e. family-friendly, good wages and opportunities for advancement.

A greater emphasis will be needed to reduce the level of youth unemployment and actively work toward a target unemployment rate below the State average.

Another area requiring focus is working with the business community to use the skills and experience available in the older demographic groups. Many people close to retirement or semi-retired in this region have exceptional skills and experience that could be better used.

There is also value in increasing opportunities for the older population to take on new skills and learning opportunities that can lead to employment options.
**EDUCATION**

Education is one of the key drivers of the region’s social, cultural and economic development and is recognised as a fundamental human right. Formal education on the Gold Coast is primarily provided through government and non-government schools, tertiary education, including TAFE, and private and public universities and campuses, as well as various business and training colleges.

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

**CHART 31 GOLD COAST QUALIFICATIONS 2006 TO 2011**
SUSTAINABLE (ECONOMIC, ENVIRONMENTAL AND SOCIAL) COMMUNITIES AND POPULATION GROWTH

THE ECONOMIC VALUE OF THE REGION

The Gold Coast region’s gross regional product (GRP) has been growing strongly over the last 20 years, although growth has slowed recently due to the GFC. The size of the region’s economy is estimated by REMPLAN\(^5\) to be $21.378 billion, accounting for 7.5% of Queensland’s $283.6 billion GRP.

Key drivers of this economic growth have been:

- Strong population increases on the Gold Coast
- Growth in key coastal industries such as tourism, retail and construction
- Attracting a more flexible workforce

This economic activity supports approximately 60,015 businesses on the Gold Coast\(^6\); 22.3% of these businesses have between one and four employees. The number of employees per business is lower than the Queensland average of 22.5%. Within the Gold Coast, 64.8% of businesses do not employ any staff (“non employing” businesses), which is comparable to the State average of 62.3%

THE ECONOMIC VALUE BY INDUSTRY IN THE REGION (INCLUDING THE TOURISM SECTOR)

Chart 32 ‘Gross Regional Product by Industry, 2011/12’ shows ‘Ownership of Dwellings’ has the highest value-added by industry on the Gold Coast, estimated to be worth $2,082 million in 2011/12.

Other strong performers include ‘Manufacturing’ ($2,005 million); ‘Financial & Insurance Services’ ($1,797 million) and ‘Health Care & Social Assistance’ ($1,524 million).

The impact of strong population increases is evident in other industry sectors, with ‘Construction’, ‘Retail Trade’; ‘Education’ having a relatively high GRP on the Gold Coast.

Tourism is a strong industry on the Gold Coast adding $1,430 million to total GRP.

\(^6\) June 2012
**GROWTH INDUSTRIES**

The largest industries have been growing at impressive rates; ‘Health Care & Social Assistance’ has increased by 38.3%, ‘Financial & Insurance Services’ by 30.6%, ‘Education & Training’ by 22.6% and ‘Retail Trade’ 19.9%.

Over the six year period, which includes the impact of the Global Financial Crisis (GFC) on the Gold Coast, there were four sectors which experienced negative growth, including ‘Construction’ (-9.1%), ‘Accommodation & Food Services’ (-9.6%), ‘Manufacturing’ (-28%) and ‘Mining’ (-34.4%). Chart 33 represents the changes in Value-added across industry sectors.

**CHART 33 CHANGE ($M) VALUE-ADDED\(^7\) BY INDUSTRY, 2006-2012**

While the ‘Construction’ sector has experienced a decline in value-added from 2006 to 2012, this sector is one of the largest contributors to GRP (see Chart 32) and remains a strong driver of the Gold Coast economy. The impact of strong population increases and an ageing demographic is evident in the strong increase in the ‘Health Care and Social Assistance’ sector.

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\(^7\) Value-Added data represents the marginal economic value that is added by each industry sector in a defined region. Value-Added can be calculated by subtracting local expenditure and expenditure on regional imports from the output generated by an industry sector, or alternatively, by adding the Wages & Salaries paid to local employees, the gross operating surplus and taxes on products and production. Value-Added by industry sector is the major element in the calculation of Gross Regional Product.
2011 Industry Profile – Business Numbers

The Gold Coast has a higher proportion of construction industry businesses compared to the Queensland average (20.2% and 18.3%, respectively), which reflects its importance in the region. ‘Rental, Hiring & Real Estate Services’ businesses have a higher representation on the Gold Coast than Queensland (14.5% and 11.2%, respectively). The ‘Transport, Postal and Warehousing’ business sector is underrepresented on the Gold Coast with 4.8% of businesses compared to 6.1% in Queensland. The Coast has a below average number of agricultural business of 1.6% compared to 10.0% for Queensland.
TOURISM

Tourism is a major industry which generates a large number of visitors to the region.

Based on data from Tourism Research Australia, there were over 11 million visitors to the Gold Coast in the year to June 2012. This is comprised of 7,041,000 domestic day visitors, 3,402,000 domestic overnight visitors and 747,000 international visitors.

The Gold Coast accounts for 19.4% of all Queensland’s visitors including 18.9% of day trippers, 18.5% of domestic overnight visits and 38.2% of international visitors to Queensland.

In the last year the number of domestic overnight visitors increased by 1.2%; day trippers decreased by 4.2%, while the international market weakened by -1.1%.

CHART 35 GOLD COAST TOURISM VISITOR NUMBERS, 2007/08 – 2011/12

Source: National Visitor Survey and International Visitor Survey

Domestic Visitors

- Day trippers account for 67.4% of total domestic visitor numbers.
- Domestic expenditure for the gold Coast region was $3.759 billion, with 80.1% attributed to overnight visitors.

International Visitors

- International visitor numbers from two of the Gold Coast’s key source markets, Japan and New Zealand, declined by 13.1% and 1.7% respectively.
- There was an 18.7% increase in the number of visitors from China.
- International visitor expenditure was $776 million for 2011/12, accounting for 22% of total Queensland international tourism expenditure.

Visitor numbers, in particular the domestic visitor market, have been strong over the last five years.
DWELLING APPROVALS AND CONSTRUCTION

The number of residential dwelling approvals has varied significantly over the last 10 years from a high of 6,937 in 2006-07 to the lowest total number of 2,277 approvals in 2011-12. Prior to the peak in the market in 2006-07 the majority of approvals were for ‘other’ dwelling approvals, eg, attached dwellings, such as units. Since this market peak, the number of house approvals has been relatively consistent, with the unit market approvals experiencing significant shift from 3,467 in 2007-08 to 942 in 2011-12.

CHART 36 GOLD COAST DWELLING APPROVALS

CHART 37 GOLD COAST VALUE OF CONSTRUCTION

Source: State of the Regions 2013-14, National Economics / Australian Local Government Association
ENVIRONMENTAL ASSETS

The Gold Coast is well known for its natural environmental assets including beaches, waterways open spaces, national parks which contribute to the region’s lifestyle.

The region’s beaches are a major tourist attraction with an estimated 5.5 million beachgoers annually.

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

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

Chart 38 shows that the available natural area per person could diminish considerably. Under the high scenario, natural environment per person could fall to 0.23 hectares by 2031, compared to 0.38 hectares per person now. Even under the low scenario, the recreation space could fall to 0.27 hectares per person.

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2016</th>
<th>2021</th>
<th>2026</th>
<th>2031</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>0.38</td>
<td>0.34</td>
<td>0.32</td>
<td>0.29</td>
<td>0.27</td>
</tr>
<tr>
<td>Medium</td>
<td>0.38</td>
<td>0.33</td>
<td>0.30</td>
<td>0.29</td>
<td>0.28</td>
</tr>
<tr>
<td>Low</td>
<td>0.38</td>
<td>0.30</td>
<td>0.29</td>
<td>0.26</td>
<td>0.23</td>
</tr>
</tbody>
</table>

CHART 38 AVERAGE RECREATION (HECTARES) AREA PER PERSON
CLIMATE CHANGE

The City of Gold Coast is defined by spectacular beaches, hinterland ranges, forests and waterways. Our city is a celebration of nature.

Following is a snapshot of our unique natural assets and values:

- The Gold Coast is home to more than 1,800 recorded species of native plants and more than 700 recorded species of native animals
- 75 native vegetation types and 58 regional ecosystem types have been mapped and described for the City of Gold Coast
- 49.1% of the city's land area (63,678 hectares) is covered in native vegetation
- 82% of the city's vegetated areas classified as being of State Significance; 10% as being of Regional Significance; and 8% as being of Local Significance
- Almost 10% of the city's land area is managed by Council for nature conservation. One-third of this land has been acquired through the Open Space Preservation Levy Acquisition Program
- Council's Voluntary Conservation Agreement and Land for Wildlife Schemes cover 2.8% of the city's land area (3,680 hectares)
- The Gold Coast's coastal wetlands and islands form part of the Ramsar site which recognises and protects wetlands of international significance
- The Springbrook and Lamington plateaus form part of the Border Ranges group of World Heritage-listed Gondwana Rainforests of Australia, protecting areas of extremely high species diversity.

The dynamic nature of the Gold Coast – its location, growth, development and demand for services – makes its exposure to climate change particularly unique. Protection of our natural assets, strengthening the economy, population growth and building sustainable communities are some of the region's biggest challenges. These challenges are all affected by the potential impact of climate change.

According to the Gold Coast Council, the Gold Coast has the following exposure to climate change:

- a range of 18-79 centimetres increase in sea level by 2100
- an increase in annual average temperature of 1.1° - 4.4° Celsius by 2070
- an increase in the number of days over 35° Celsius up to 14 days per annum by 2070
- an increase in 1-in-100 year storm surge height by 0.35 metres, and
- an increase in extreme rainfall intensity for 2-hour events of 46 per cent by 2070

Risks associated with climate change are not limited to environmental impacts but also those of a social and economic nature. Over time climate change is anticipated to affect every part of the community in varying degrees, including: financial well-being, social connectivity, legal indemnity and insurance, health and lifestyle, decision making and leadership.

Such impacts, especially sea levels rising and the increased likelihood of more extreme weather including flooding, will have impacts on the land available for further urban development and redevelopment, in particular close to the coast and waterways, may be further impacted.

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9 Climate Change Strategy, 2009-2014. Gold Coast City Council
10 Ibid. Page 5.
The Gold Coast is expected to experience a number of changes due to climate change. Based on CSIRO projections, Australian average temperatures are projected to increase by 0.6 to 1.5 ºC by 2030 and by 1 to 5 ºC by 2070. As the chart below shows, average temperatures on the Gold Coast are expected to rise into the future. The warming projected for Australia in 2070 is 1.0 to 2.5 ºC for a low emission scenario and 2.2 to 5.0 ºC for a high emission scenario (similar to the world’s current path)\(^\text{11}\).

**CHART 39 PROJECTED TEMPERATURES – GOLD COAST (CELSIUS)**

![Projected Temperatures Chart](chart)

Source: Derived from CSIRO Climate Change in Australia 2007, best estimate temperature change for Australia applied to current Gold Coast average temperatures (Bureau of Meteorology)

**GREENHOUSE GAS EMISSIONS - PROJECTED EMISSIONS**

According to the City of Gold Coast\(^\text{12}\), the Gold Coast emits over 10 million tonnes of CO2 equivalents each year – 20 tonnes per resident. Chart 40 identifies the increases in greenhouse gases that could be expected from further population growth. Total greenhouse gas emissions are forecast to grow under each scenario, which assumes that current levels generated per capita do not increase.

Under the medium scenario, emissions are expected to increase from approximately 10.28 tonnes per annum to 15.08 tonnes per annum by 2031 due to population increases.

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AIR QUALITY

The local air quality on Gold Coast is generally high due to relatively low levels of industrial emissions, however, increasing population and reliance on motor vehicles is placing pressure on our air quality.

WATER RESOURCES

Hinze Dam supplies most of the water provided to Gold Coast City. It was completed in 1976 and expanded in 1989 and 2011. It was first managed by Gold Coast Water with management of the dam now handled by Seqwater. The dam also provides the benefit of flood mitigation to populated areas along the Nerang River downstream of the dam.

It holds 310,730 ML of water across a surface area of 9.72km². The 207km² (80sqmi) catchment area for Hinze Dam includes the Numinbah Valley and Springbrook Plateau, with most being contained within state forests and national parks.

TABLE 1 WATER CONSUMPTION & PRODUCTION AS AT JULY 2013 (JULY 2012)

<table>
<thead>
<tr>
<th>Water Consumption &amp; Production</th>
<th>Gold Coast</th>
<th>South East Queensland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average daily water production (ML)</td>
<td>145</td>
<td>701</td>
</tr>
<tr>
<td>Average daily water consumption (litres per person)</td>
<td>178 (173)</td>
<td>153 (146)</td>
</tr>
</tbody>
</table>
### Social

#### URBAN DEVELOPMENT PROFILE

The population scenarios have been based on the Queensland Government\(^{13}\) projections, shown later in this section.

The average household size on the Gold Coast was 2.5 persons in 2011\(^ {14}\), this average has been held constant across the projected period.

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

Under the high population scenario, an additional 121,701 dwellings would be required in the region, a 59.2% increase from 2011.

#### CHART 41 GOLD COAST HOUSEHOLD PROJECTIONS, 2011-2031

![Gold Coast Household Projections Chart](chart.png)


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\(^{13}\) Queensland Government population projections, 2011 edition (medium series), Office of Economic and Statistical Research, Queensland Treasury and Trade.

\(^{14}\) Based on the 2011 Census, there were 195,580 total households enumerated and 494,496 people (place of usual residence) on the Gold Coast, equating to an average of 2.5 persons per household.
TABLE 2 DWELLING SCENARIOS FOR THE GOLD COAST, 2011 – 2031

<table>
<thead>
<tr>
<th></th>
<th>Number of Dwellings</th>
<th>Increase 2011-2031</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2011</td>
<td>2016</td>
</tr>
<tr>
<td>Low</td>
<td>205,582</td>
<td>226,556</td>
</tr>
<tr>
<td>Medium</td>
<td>205,582</td>
<td>231,693</td>
</tr>
<tr>
<td>High</td>
<td>205,582</td>
<td>237,694</td>
</tr>
</tbody>
</table>


URBAN DENSITY

The Gold Coast region has a population density of approximately 380 people per square kilometre (2012 population of 524,583 and total Council Area of 1,379 square kilometres), which is far greater than total Greater Brisbane (135.6 people per square kilometre).

This higher average is a reflection of the high density high rise apartments and residential towers concentrated along the coastline from Burleigh Heads to Runaway Bay.

According to the Socio-Economic Indexes for Areas (SEIFA - developed by the ABS from the 2011 Census), the Gold Coast is ranked ninth in out of approximately 80 LGAs in Queensland with a score of 1,014.2.

Mining LGAs such as: Weipa, Isaac, Central Highlands, Mackay and Gladstone in addition to Brisbane (1,047.7) have a higher index. The Sunshine Coast is ranked 12th with an index of 1,007.3.

The five localities with the lowest SEIFA score on the Gold Coast are: Coolangatta (929.4); Biggera Waters –Labrador (943.3); Southport (951.4); Coombabah (962.1) and Bilinga-Tugun (979.7).

Low socio-economic areas tend to have poorer health and physical activity measures such as Type 2 Diabetes and obesity, in particular where there are larger numbers of those aged 65+.

These five localities have high numbers of people aged 65 years and over and have a greater unemployment rate compared with the rest of the Gold Coast.
HEALTH

In 2009, 67.4% of residents reported to be in excellent to very good health – slightly higher than the Queensland average of 66.7%. The region has lower rates of self-reported diabetes and high blood pressure than Queensland, but similar rates of high blood cholesterol.

In 2009/10, the region had a much higher number of GP consultations, in particular for general psychologist services, 45 year old health checks and 75 years and over health assessments, than Queensland or Australia. The region had a lower level of social worker services than Queensland and Australia as a whole.

The region has lower rates of immunisation (88.5%) than Australia as a whole (91.3%) which is concerning as the vaccine preventable diseases of whooping cough, chicken pox and measles are on the increase.

The higher than state wide rates of smoking and exposure to sunburn are important, but a positive note is the higher than state wide rate of physical activity and lower rate of obesity.

<table>
<thead>
<tr>
<th>Self-Reported Health Indicator</th>
<th>Gold Coast</th>
<th>Queensland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diabetes or high blood sugar</td>
<td>5.7%</td>
<td>7.6%</td>
</tr>
<tr>
<td>High blood pressure</td>
<td>25.3%</td>
<td>27.5%</td>
</tr>
<tr>
<td>High cholesterol</td>
<td>28.6%</td>
<td>28.5%</td>
</tr>
<tr>
<td>Smoking</td>
<td>17.1%</td>
<td>15.9%</td>
</tr>
<tr>
<td>Sunburnt previous weekend</td>
<td>14.5%</td>
<td>10.7%</td>
</tr>
<tr>
<td>Sufficient physical activity for health benefit</td>
<td>57.8%</td>
<td>54.7%</td>
</tr>
<tr>
<td>Overweight or obese</td>
<td>48%</td>
<td>55.3%</td>
</tr>
</tbody>
</table>

Source: Medicare Local, Gold Coast Health and Wellbeing Plan 2012

There is already evidence that the hospital system is having difficulty coping with the growing demand for services on the Gold Coast.

Gold Coast Hospital waiting times for elective surgery in 2010-2011 range from 22 days for vascular surgery to 63 days for neurosurgery which are longer than the Australian average. Waiting lists are significant and increasing for referrals to specialists in public hospitals in the Gold Coast region, with the highest rates being for ENT, neurosurgery, orthopaedic, ophthalmology and gynaecology specialists.

Hospital waiting list times are expected to reduce from 2013 onwards when the new $1.76 billion Gold Coast University Hospital (GCUH) opens and accepts patients for the first time.

It will be one of Queensland’s largest clinical teaching and research facilities. It will provide specialised health services that meet the needs of patients as well as the learning requirements of our future clinicians.
POPULATION PROFILE

CURRENT POPULATION CHARACTERISTICS

The Gold Coast’s population can be characterised as reasonably typical of the State and National averages in terms of age cohorts; which are highlighted in the chart below.

CHART 42 GOLD COAST AGE DISTRIBUTION, 2011

In comparison to the National and State averages, the Gold Coast has a marginally higher proportion of residents aged 65 and over, reflecting the appeal of the Gold Coast as a retirement destination.

In comparison to Queensland’s average, there is a marginally lower proportion of 5-14 year olds.

The median age of people in the Gold Coast (C) (Local Government Area) was 37, which is comparable to the State average of 36 and the National average of 37 years.
**FUTURE POPULATION LEVELS**

The Queensland Treasury has developed population scenarios for the region based on various demographic assumptions. They have prepared low, medium and high population increase scenarios to 2031, however, at the time this document was compiled, the population projections had not been revised to reflect the 2011 Census data and subsequently the 2011 Estimated Resident Population (ERP)\(^{15}\). To allow for this, the growth rates forecast by Treasury have been applied to the 2011 ERP. This takes into account that the 2011 ERP is below the low series forecast level. Over the last five years the region has been growing at an average of 9,500 people per year, which is less than the low series population projections.

In the two decades to 2031, the number of people over the age of 65 is predicted to more than double (from 73,307 to 152,193 – medium series projections), while the number of people over the age of 85 is likely to almost treble. Although this structural ageing of the population is a national phenomenon, the impacts are experienced earlier and more profoundly in sea change communities like the Gold Coast, than they are in non-coastal communities.

The ageing population has many implications including increased expenditure associated with income support, adequate provision of health and disability services and increased need for family and community care. Changing demographics of the region will also lead to transformation in urban form across the Coast, with increased need for health hubs and the number, type and location of relevant services.

**CHART 43 GOLD COAST POPULATION PROJECTIONS TO 2031**

The population is projected to grow strongly under each scenario. By 2031 even under the low series (depicted by the blue line in Chart 43), the population is forecast to grow to 697,867, an increase of 35.8% from 2011. Under the medium scenario (red line) a 46.7% increase is forecast and under the high scenario (green line) a 59.2% increase is forecast (see Table 4 below).

\(^{15}\) Australia Bureau of Statistics, Regional Population Growth, Cat. 3218.0 (Released on 30 April 2013. 2012 data will be revised in August 2013)
TABLE 4 POPULATION SCENARIOS FOR THE GOLD COAST POPULATION

<table>
<thead>
<tr>
<th></th>
<th>Number of People</th>
<th>Increase 2011-2031</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2011</td>
<td>2016</td>
</tr>
<tr>
<td>Low</td>
<td>513,954</td>
<td>566,391</td>
</tr>
<tr>
<td>Medium</td>
<td>513,954</td>
<td>579,232</td>
</tr>
<tr>
<td>High</td>
<td>513,954</td>
<td>594,236</td>
</tr>
</tbody>
</table>

Source: 2011 - ABS Regional Population Growth, Cat 3218.0. 2016 to 2031- Queensland Treasury growth rates applied to 2011 ERP.

Under the low population scenario, the Gold Coast is forecast to grow faster than Queensland overall, and under the medium and high series scenarios the Gold Coast is projected to grow faster than the Queensland rate until sometime after 2026 where the rate of growth is expected to be lower than that of the State. (In the Chart below the medium series is shown). Even under the low growth scenario projecting an increase of 183,913 people over the next 20 years, there will be considerable further investment in infrastructure required.

CHART 44 GOLD COAST PROJECTED MEDIUM SERIES POPULATION GROWTH (%)

The population of the Gold Coast in 1996 was 343,280, as such the high growth population scenario of approximately 304,252 people equates to adding the population of the Gold Coast 15 years ago in 1996 to the current regional population. For this magnitude of growth to be accommodated requires substantial planning and investment in infrastructure to maintain the quality of residents’ lifestyles.

It is stressed that these projections essentially show what the region could grow to should the circumstances allow. There is considerable debate in the region about this issue.
**FUTURE DWELLING LEVELS**

Based on the population projections presented in Table 4, the following dwelling scenarios have been projected under the low, medium and high population projections.

**TABLE 5 DWELLING SCENARIOS FOR THE GOLD COAST POPULATION**

<table>
<thead>
<tr>
<th></th>
<th>Number of Dwellings</th>
<th>Increase 2011-2031</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2011</td>
<td>2016</td>
</tr>
<tr>
<td>Low</td>
<td>205,582</td>
<td>226,556</td>
</tr>
<tr>
<td>Medium</td>
<td>205,582</td>
<td>231,693</td>
</tr>
<tr>
<td>High</td>
<td>205,582</td>
<td>237,694</td>
</tr>
<tr>
<td></td>
<td>No.</td>
<td>73,565</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>35.8%</td>
</tr>
</tbody>
</table>

Source: 2011 - ABS Regional Population Growth, Cat 3218.0. 2016 to 2031 - Queensland Treasury growth rates applied to 2011 ERP. Average household size of 2.5 persons applied to population projections. (Note average household size in 1996 was 2.5; 2001 – 2.47, 2006 – 2.49, 2011 – 2.5)

Under the medium dwelling projections, there is projected to be the demand for an additional 96,055 dwellings on the Gold Coast to accommodate the projected additional 240,136 residents.

**CHART 45 GOLD COAST DWELLING PROJECTIONS, 2011 TO 2031**

Source: 2011 - ABS Regional Population Growth, Cat 3218.0. 2016 to 2031 - Qld Treasury growth rates applied to 2011 ERP. Average household size of 2.5 persons applied to population projections. (Note average household size in 1996 was 2.5; 2001 – 2.47, 2006 – 2.49, 2011 – 2.5)
AGEING OF THE POPULATION

The region has an older age profile with 14.3% of the population aged 65 years or older as at June 2011\(^\text{16}\), compared to 12.9% for Queensland and 13.8% for Australia.

By 2031, the proportion of the population in this age group is expected to increase from 14.3% to 20.2% or an additional 152,195 people. The number of people aged 85 or over is expected to increase by 25,493 people, increasing from 1.8% of the population in 2011 to 3.4% in 2031.

The Gold Coast’s ageing population will have an impact on the need to plan appropriate health and community services and infrastructure for the region.

An active and healthy community is resilient and enhances the quality of people’s lives. A number of programs are planned or underway to increase population health and physical activity outcomes on the Gold Coast. The “Active and Healthy” program offers over 170 free and low cost health and fitness activities each week across the Gold Coast. The Active and Healthy program features a new initiative this year. Health and wellbeing seminars will be held at various locations across the Gold Coast throughout the year, and will feature local wellness warriors and fitness champions\(^\text{17}\).

RDA Gold Coast supports initiatives and partnerships that contribute to wellbeing, and healthy and active communities.

POPULATION LEVELS – LIFECYCLE

REPLACE have produced a population model by lifecycle, with the results shown in the charts below. The lifecycle projections in chart 46 identifies all segments will grow over the next 20 years, particularly the older age groups (empty nesters, retirees and elderly). The key strategic economic issue is how to manage this population increase so that it is sustainable and provides the Gold Coast with a vibrant population base that is economically productive.

CHART 46 GOLD COAST LIFESTAGE MIX - 2011 AND 2031

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\(^{16}\) ABS Catalogue No: 3235.0 Population by Age and Sex, Regions of Australia, 2011

The Gold Coast has a below average population of Indigenous people (1.25% or 6,200 people) compared with the Queensland average of 3.6%. The term indigenous refers to both Aboriginal and Torres Strait Islander people.

Gold Coast City has a large young Indigenous population—35.5% were aged 14 years or younger, compared with 14.5% for the non-Indigenous population. There is a very small older Indigenous population with only 3.5% aged 65 years or over. This is compared with 14.5% of the non-Indigenous Gold Coast population.

38.4% of Indigenous people attending an educational institution were in pre-school, primary or secondary school—compared to 32.4% of non-Indigenous attendees. 17.2% of Indigenous people attending an educational institution in 2011 were attending university or other tertiary institution—compared to 25.7% of non-Indigenous attendees.

43.5% of Indigenous persons were earning less than $400 per week—a higher proportion than non-Indigenous persons (36.3%). The median weekly household income for Indigenous households was $1,167, compared to $1,174 for non-Indigenous households.

The following chart identifies the possible change in the Gold Coast’s lifecycle composition over the next 20 years under the medium population scenario. It shows an additional 15,390 elderly residents (over 85 years); 58,350 retirees, an additional 45,360 adult members of families and 38,000 of their pre-school and school aged children.

The growth in retirees is consistent with Australia’s aging population. Singles and couples are also forecast to grow by 31,500.

There will be a requirement for key infrastructure to meet the needs of each stage of the lifecycle in the future:

- Pre-school children: child care centres and pre-prep infrastructure
- Children/students: educational institutions
- Singles: education/vocational opportunities, career opportunities
- Couples (no children): career opportunities, public transportation, housing
- Families: education (for children), career opportunities, housing
- Empty nesters: career/work opportunities
- Retirees: leisure, health facilities and increasingly some job opportunities
- Elderly: aged care, health facilities

### CHART 47 GOLD COAST LIFECYCLE MIX, CHANGE BETWEEN 2011 AND 2031

![Chart showing lifecycle mix change](chart)

*Source: REMPLAN based on ABS and OESR data*
DEMOGRAPHIC PROFILE - INDIGENOUS POPULATION

The Gold Coast has a below average population of Indigenous people (1.25%) – 6,200 people, compared with the Queensland average of 3.6%. The term indigenous refers to both Aboriginal and Torres Strait Islander people.

Gold Coast City has a large young Indigenous population – 35.5% were aged 14 years or younger, compared with 14.5% for the non-Indigenous population. There is a very small older Indigenous population with only 3.5% aged 65 years or over. This is compared with 14.5% of the non-Indigenous Gold Coast population.

38.4% of Indigenous people attending an educational institution were in pre-school, primary or secondary school - compared to 32.4% of non-Indigenous attendees. 17.2% of Indigenous people attending an educational institution in 2011 were attending university or other tertiary institution - compared to 25.7% of non-Indigenous attendees.

43.5% of Indigenous persons were earning less than $400 per week – a higher proportion than non-Indigenous persons (36.3%). The median weekly household income for Indigenous households was $1,167, compared to $1,174 for non-Indigenous households.

CHART 48 GOLD COAST INDIGENOUS STATUS, 2011
ETHNICITY

Chart 49 shows that the Gold Coast has a population predominantly born in Australia (65.2%), which is lower than the Queensland average (73.7%). The Coast has a higher proportion of New Zealand and UK born residents.

CHART 49 GOLD COAST ETHNIC MIX (PLACE OF BIRTH), 2011

Gold Coast universities and TAFE play an important role in increasing the cultural diversity of the region through its international student program.

In July 2013, there were over 7,500 international students at these institutions from over 60 countries, including Germany, France, Japan, Republic of Korea and India. There are also around 150 Indigenous students enrolled.

Culturally and linguistically diverse communities can experience language barriers and isolation along with difficulties in accessing services and employment opportunities.
MIGRATION

The migration data shows where residents of the Gold Coast lived five years ago, between the 2006 and 2011 Census periods. Approximately 66,400 residents migrated to the Gold Coast:

- 28,285 from Queensland
- 23,443 from New South Wales
- 7,144 from Victoria
- 2,066 from South Australia

**CHART 50 PLACE OF RESIDENCE QUEENSLAND & NEW SOUTH WALES 5 YEARS AGO**

Of the 28,300 residents who lived in other parts of Queensland, 18,500 moved from the greater Brisbane region (including over 9,000 from Brisbane (C); 5,766 from Logan (C); 1,476 from Lower West Moreton; and 1,408 from Redland City).

Of the 23,443 residents that migrated from New South Wales, there were 11,211 from the broader Sydney region; 4,840 from Richmond-Tweed Region and 2,330 from the Mid-North Coast. Of the 7,144 Victorians who migrated, 5,113 came from the broader Melbourne Region.
Dwellings

While the majority of housing on the Gold Coast is ‘separate houses’, (55.6%), this is significantly lower than the state average of 75.5%. There is a much higher incidence of people living in attached housing on the Gold Coast (42.5%) which is almost double the Queensland average of 21.7%.

**CHART 51 GOLD COAST DWELLING STRUCTURE, 2011**

In the Gold Coast (C) LGA, 22.4% of dwellings were ‘owned outright’, which was lower than the State average of 25.5%. The proportion of dwellings that are ‘owned with a mortgage’ is similar for the Gold Coast and Queensland. The Gold Coast (C) has a higher proportion of dwellings that are being rented (29.4%) compared to the Queensland average (27.7%).

**CHART 52 GOLD COAST DWELLING OWNERSHIP, 2011**

**CHART 53 GOLD COAST INTERNET CONNECTION**

While 61% of Gold Coast and Queensland dwellings have broadband connection, only 12.9% of Gold Coast dwellings have ‘No Internet Connection’ compared to the State average of 16.1%.

18 Excludes: ‘not stated’, ‘not applicable’.

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The median mortgage repayments on the Gold Coast were $2,075, compared to $1,850 in Queensland and $1,800 for Australia.

As a potential indicator of housing stress that may be occurring in the region, with higher rental and mortgage repayments and lower incomes, the 2011 Census Quickstats identifies that the Gold Coast has 13.1% of households where mortgage repayments were more than 30% of household income, which was comparably higher than Queensland (9.7%) and Australia (9.9%).

When compared to the Queensland average, the Gold Coast has a considerably lower proportion of rent payments in all rental brackets less than $299 per week. In addition, the Gold Coast has a comparably higher proportion of rent payments in all rental brackets over $300 per week.

The median rent on the Gold Coast (C) was $350, considerably higher than that of the State average ($300) and the National average of $285.

Housing stress also relates to rental payments, with the 2011 Census Quickstats[^20] identifying the Gold Coast has 17.1% of households where rent repayments were more than 30% of household income, which was comparably higher than Queensland (11.9%) and Australia (10.4%).

HOUSEHOLD AND INDIVIDUAL INCOME

CHART 56 GOLD COAST WEEKLY HOUSEHOLD INCOME

The Gold Coast has a similar ‘Household Income’ distribution to the State averages for weekly incomes up to $1,999. It is after this threshold that State averages are higher than the Gold Coast for all income brackets, in particular the $2,500-$2,999 and $3,000 to $3,499 ranges. The median Gold Coast household income was $1,174 compared to $1,235 for the Queensland average.

CHART 57 GOLD COAST WEEKLY INDIVIDUAL INCOME

Gold Coast residents typically have lower weekly earnings than State averages, with a higher proportion earning lower incomes and conversely a lower proportion earning higher incomes. The threshold appears to be at up to $52,000 per annum or $999 per week. The median weekly income for Gold Coast residents was $571 which compares to $587 for the Queensland average.

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