

When contacting Council please ask for
Mr Scott Turner
Tel: 07 5540 5111
Ref: LS
19/03/004



82 Brisbane Street
PO Box 25
BEAUDESERT QLD 4285

Tel 07 5540 5111
Fax 07 5540 5103

mail@scenicrim.qld.gov.au
www.scenicrim.qld.gov.au

ABN: 45 596 234 931

3 March 2017

Draft South East Queensland Regional Plan Review Feedback
Department of Infrastructure, Local Government and Planning
PO Box 15009
CITY EAST QLD 4000

Dear Sir/Madam

Scenic Rim Regional Council Submission on ShapingSEQ - Draft South East Queensland Regional Plan October 2016

Thank-you for the opportunity to make a submission on *ShapingSEQ - Draft South East Queensland Regional Plan (ShapingSEQ)*. Council has reviewed *ShapingSEQ* and provides the enclosed submission for your consideration.

Council is appreciative of the extent of engagement that has been afforded to local governments as part of the current review of the South East Queensland Regional Plan. Whilst Council is largely supportive of the draft policy of *ShapingSEQ*, Council requests that the following matters are considered as part of the finalisation of the planning instrument:

- Recognition of the Bromelton State Development Area (SDA) as an 'Area of Regional Economic Significance';
- Review of the employment planning benchmarks for the Scenic Rim to more accurately reflect the employment expected to be generated by the Bromelton SDA and subsequently, ensure that the transport network needed to support the SDA in the long-term is identified;
- Identification of the ultimate realignment of the Mt Lindesay Highway through Bromelton as a 'Freight Link Investigation' in the Connect Theme;
- Inclusion of part of Warrill View in the Rural Living Area Regional Land Use Category; and
- Minor expansion of the Tamborine Mountain and Harrisville Urban Footprints to include an additional lot to facilitate planned retirement and residential care accommodation to support both localities.

Please refer to the enclosed attachment for further details of the above submission matters.

Should you have any queries or require further information on the enclosed submission, please do not hesitate to contact Scott Turner, Manager Planning on (07) 5540 5111.

Yours faithfully

A handwritten signature in black ink, appearing to read "Tony Magner", is written over a large, faint, diagonal watermark that says "DRAFT".

Tony Magner
DIRECTOR REGIONAL SERVICES

SCENIC RIM REGIONAL COUNCIL SUBMISSION - SHAPINGSEQ - DRAFT SOUTH EAST QUEENSLAND REGIONAL PLAN		
Section	Comments	Recommendation Sought
1. Chapter 3, Part A, Goal 1: Grow <u>Element 3 - New Communities</u> New communities support a consolidated urban settlement pattern, maximise the use of existing infrastructure and deliver high-quality communities. <u>Strategy 3</u> "Except within rural localities (as identified in the sub-regional directions), plan for a net residential density of 15–25 dwellings/ha in new urban areas or 30–60 dwellings/ha net residential density if these areas are within easy walking distance to an existing or proposed public transport station".	It is noted that the urban areas of the Scenic Rim have been specifically excluded from the residential density targets prescribed under <i>ShapingSEQ</i>. Council is supportive of the draft policy that provides regional local governments in SEQ with the autonomy to plan for and implement net residential densities targets appropriate for their rural localities.	1. Council supports the specific exclusion of the Scenic Rim from the prescribed residential density targets under Element 3, Strategy 3 of <i>ShapingSEQ</i>.
2. Chapter 3, Part A, Goal 1: Grow <u>Element 5 - Growing rural towns and villages</u> Rural towns and villages provide for growth and community development in a way that reinforces local identity. <u>Strategy 1</u> Support the sustainability of rural towns and villages by providing sufficient land and infrastructure	The draft policy of Element 5 establishes the planning framework to contemplate the sustainable growth of the region's rural towns and villages located outside of an Urban Footprint designation. Council is supportive of the ability to undertake planning for these smaller localities to ensure that they are positioned to respond to any growth pressures and change that may occur over time. Council has identified an immediate need to undertake local planning for the locality of Beechmont. The Beechmont plateau currently supports a small mountain top community in a unique natural and landscape setting. The <i>Scenic Rim Community Plan 2011-2026</i> seeks to ensure that Beechmont continues to thrive by retaining its quality lifestyle and protecting its valuable productive and natural environments. However, the gradual decline of rural production in the locality has triggered a need to consider how the area transitions in response to this change and what alternative opportunities may be	2. Council supports the policy of Element 5 of <i>ShapingSEQ</i>, which provides a planning framework to consider the sustainable growth of rural towns and villages not included in an Urban Footprint designation such as Beechmont. Council proposes to utilise this policy mechanism to respond to the changes occurring in Beechmont and investigate potential opportunities for the sustainable growth of the community

to accommodate population and employment growth while avoiding the fragmentation of productive rural land. <u>Strategy 2</u> Plan for well-designed growth that integrates sensitively with existing local character and identity and promotes the viability of the rural economy.	available to landowners, which still ensure that the expectations of the community plan are met. Furthermore, recent engagement with the local community also highlighted concerns regarding access to services and supporting infrastructure and facilities. The ability to consider these changes through a local planning study and establish the necessary framework in the planning scheme to respond to these changes is supported. It is noted that where planning undertaken for rural towns and villages consistent with the requirements of <i>ShapingSEQ</i> is reflected in a planning scheme, such areas will be considered an urban area for the purpose of the regulatory provisions supporting the implementation of the regional plan.	commensurate with expected population growth.
3. Chapter 3, Part A, Goal 2: Prosper <u>Element 2: Areas of Regional Economic Significance</u> Economic opportunities and synergies within and between SEQ's areas of regional economic significance are accelerated. <u>Strategy 1</u> Facilitate the intensification and/or expansion of areas of regional economic significance to enhance economic growth and activity (Maps 2, 2a, 2b and Table 6). <u>Strategy 2</u> Identify and protect existing areas of regional economic significance and their enabling infrastructure from encroachment by incompatible land uses. <u>Strategy 3</u> Investigate opportunities to develop new areas of regional economic significance that leverage off and support intensification of economic activity in and around clusters or corridors or major employment nodes and infrastructure.	<i>ShapingSEQ</i> seeks to facilitate the intensification and/or expansion of identified Areas of Regional Economic Significance (ARES). ARES are areas in the region that 'demonstrate a synergy across economic and employment areas important to the region because they contain a concentration of significant economic activity'. It is noted that ARES: • support groupings of employment precincts; • support high levels of specialisation in one or more high value industry sector; • support significant levels of employment; • are supported by significant state and/or local government commitments; and • have strong transport connections. It is considered that the Bromelton State Development Area (SDA) exhibits a number of the characteristics required to be recognised as an ARES and generally meets the intent of an ARES designation. A report has been included in Appendix 1 that seeks to highlight the significance of the Bromelton SDA to the region and outline reasoning in support of the elevation of Bromelton from a 'Major Enterprise and Industrial Area' to an ARES. In summary, these include: • The development intent of the Bromelton SDA under the Development Scheme, which seeks to cater for industrial activities of regional, state and national significance with a logistic and a rail-dependent industrial focus. This intent has become a reality with the commencement of the SCT intermodal facility; • The number of significant industrial uses currently operating in the Bromelton SDA including the SCT intermodal facility, Gelita gelatine factory, AJ Bush and Son's rendering plant etc; • The acquisition by the Australian Rail Track Corporation (ARTC) of a significant land holding in the Bromelton SDA, whom are the delivery agent for the construction elements of the inland rail project that will see the development of an inland rail	3. Council requests the recognition of the Bromelton SDA as an Area of Regional Economic Significance (ARES) in the Prosper Theme of <i>ShapingSEQ</i>. 4. If not included as an ARES, at a minimum Council requests that the state government undertakes the necessary investigations in accordance Chapter 3, Part A, Goal 2, Strategy 3 of <i>ShapingSEQ</i> to ensure that the Bromelton SDA is recognised as an ARES as part of the next review of the regional plan.

	freight corridor between Brisbane and Melbourne; • The delivery of a number of key infrastructure projects (currently under construction) that will facilitate the long-term development of the Bromelton SDA, which include a 6.1 kilometre water trunk main from Beaudesert and the Beaudesert Town Centre Bypass; • The significant employment and gross operating surplus projected to be generated at the time of 'build out' of the Bromelton SDA (i.e. current Urban Footprint area), being a yield of approximately 24,800 workers and \$1,975.2 million in annual value added respectively; • The proximity, accessibility and connectivity of the Bromelton SDA to the Principal Rural Activity Centre of Beaudesert, which provides critical mass and opportunities for synergies to necessary business and commercial activities; • The proximity to enabling infrastructure such as the Sydney-Brisbane rail corridor and the State-controlled road network; • The available areas for industrial expansion with direct access to the rail corridor to the north of the existing Urban Footprint; and • The development opportunities in northern Bromelton SDA presented by the connection of the Southern Freight Rail Corridor to the Sydney-Brisbane rail corridor (which will serve as the major freight link connecting a future Melbourne to Brisbane Inland rail line with the existing SEQ rail freight network) and its proximity to the Greater Flagstone.	
4. Chapter 3, Part A, Goal 2: Prosper <i>Major enterprise and industrial areas, including their supply chain networks, grow and enhance national and global trade.</i> <u>Strategy 5</u> <i>Protect the current and future freight and supply chain networks that form part of the strategic transport system, and activities</i>	<i>ShapingSEQ</i> identifies the strategic road and freight system for SEQ between 2016 and 2041, which includes existing and future freight corridors (both road and rail) as well as two freight link investigation corridors, being Acacia Ridge to the Port of Brisbane and the Cunningham Highway to the Logan Motorway. The freight system of particular relevance to Bromelton includes the Existing freight corridor (rail) (being the Sydney-Brisbane rail corridor), the Existing inter-modal terminal (at Bromelton) and the Existing freight corridor (road) (being the Mt Lindesay Highway). As previously noted, the Bromelton SDA is a key node in meeting a range of regional industry needs and its projected growth scenario will significantly exceed the expectations of the employment planning benchmarks identified for the Scenic Rim in <i>ShapingSEQ</i>. The SDA therefore requires in the long-term connectivity to a freight	5. Council seeks the recognition of the proposed realignment of the Mt Lindesay Highway through Bromelton as a "Freight Link Investigation" in <i>Connect Map 3b - Strategic road and freight system 2016 - 2041</i> and also in <i>Chapter 3, Part C: Sub-regional directions for the Western Sub-Region</i> as a "Future Investigation" under Outcomes for Connect.

that support major enterprise and industrial areas, from encroachment by incompatible land uses.

Chapter 3, Part A, Goal 3: Connect

Element 1: An efficient movement system

People and freight move efficiently around the region, maximising community and economic benefits.

Strategy 3

Prioritise efficient and reliable freight movement on key corridors to minimise conflicts with other transport and land uses (Map 3b).

Chapter 3, Part C: Sub-regional directions

Western Sub-Region, Future Investigation

network that ensures efficient and reliable freight movement is achieved with key activity centres and freight origins and destinations in SEQ.

A significant body of work has been undertaken by both Council (and the Department of Transport and Main Roads), which identified the need that the 'build out' of the first stage of the Bromelton SDA (i.e. current Urban Footprint) would require to be serviced by a motorway standard north-south highway link connecting the key inter-modal and industrial node to SEQ via the Mt Lindesay Highway at Woodhill (please refer to **Figure 4** of **Appendix 1** for the proposed alignment). The existing Mt Lindesay Highway through Beaudesert will experience capacity issues at 'build out' notwithstanding the Beaudesert Town Centre Bypass currently under construction, which is recognised as an interim infrastructure solution. The ultimate realignment of the Mt Lindesay Highway through Bromelton to Woodhill would ensure that the Bromelton SDA at 'build out' is continued to be serviced by an efficient and reliable freight network and remove heavy vehicle traffic from the existing and future residential areas of Beaudesert.

The proposed realignment of the Mt Lindesay Highway through Bromelton is currently mapped in the Development Scheme for the Bromelton State Development Area (i.e. Indicative Bromelton North-South Arterial Road) and is required to be considered in the assessment of development applications in terms of achieving prescribed building setbacks and landscaping provision to the future road.

The proposed infrastructure is also identified as a Future Transport Route in the *Beaudesert Shire Planning Scheme 2007*, which the Department of Transport and Main Roads required at the time to be included in the planning scheme as part of the plan making process undertaken by Council to implement the recommendations of the Bromelton Structure Plan. Furthermore, it is understood that the construction cost of the proposed highway link has informed the infrastructure contributions currently being applied by the Department of Transport of Main Roads to industrial development in the SDA via Infrastructure Agreements.

In light of the extent of planning undertaken for the proposed highway link, Council seeks the recognition of the proposed realignment of the Mt Lindesay Highway through Bromelton as a "Freight Link Investigation" in *Connect Map 3b - Strategic road and freight system 2016 - 2041* and also in *Chapter 3, Part C: Sub-regional directions* for the *Western Sub-Region* as a "Future Investigation" under the Outcomes for Connect. The report included in **Appendix 1** further highlights the significance of key infrastructure commitments in ensuring the Bromelton SDA achieves its intent of becoming an intermodal and industrial node of regional significance.

The existing Mt Lindesay Highway is identified as an "Existing Freight Corridor (Road)"

	in <i>ShapingSEQ</i>. The existing Mt Lindesay Highway is considered to be a key component of SEQ's strategic road and freight system, in particular for the Metro Sub-Region and Western Sub-Region. The Mt Lindesay Highway will be required to support significant greenfield growth in Greater Flagstone and Yarrabilba and also freight and heavy vehicle movements to and from the Bromelton SDA. There is no reference in <i>ShapingSEQ</i> to the improvements expected to be required to the Mt Lindesay Highway to cater for the growth anticipated in parts of the Metro and Western Sub-Regions. Accordingly, delivering improvements to the Mt Lindesay Highway is requested to be considered as priority regional infrastructure for the above sub-regions.	
5. Chapter 3, Part A, Goal 3: Connect <u>Element 2: Integrated planning</u> Infrastructure and land use planning and delivery are integrated. <u>Strategy 3</u> Coordinate and integrate the planning and delivery of infrastructure and services at regional, sub-regional and local levels using a consistent set of regional plan growth assumptions, including the 2041 dwelling supply and employment planning benchmarks (Tables 2 and 4, and Appendix 1) and supporting assumptions.	Appendix 1 of <i>ShapingSEQ</i> incorporates employment planning benchmarks by industry for each local government area. The employment planning benchmarks informs a number of different policy areas of <i>ShapingSEQ</i>, including ensuring that sufficient land is made available for accommodating projected employment and the planning and delivery of infrastructure needed to support SEQ during the life of the plan. Council does not support the employment projections identified for the Scenic Rim in <i>ShapingSEQ</i>. In particular, the projections do not reflect the employment anticipated to be generated in the Bromelton SDA. <i>ShapingSEQ</i> projects that an additional 7,610 jobs will be generated in the Scenic Rim between 2016 and 2041, resulting in a total anticipated employment of 21,781. Of particular relevance to Bromelton is the 2041 employment projections allocated to manufacturing and warehousing, which are outlined below. • <i>Manufacturing</i>: 893 jobs in 2016 to 1210 jobs in 2041; and • <i>Transport, postal and warehousing</i>: 442 jobs in 2016 to 604 jobs in 2041. Council recently commissioned an analysis titled '<i>Employment Implications of the Development of Bromelton</i>' dated August 2016 to investigate the anticipated demand and timing of employment in Bromelton and subsequently, the Scenic Rim's capacity to provide a sufficient workforce to support the continue development of Bromelton in the long-term (please refer to Appendix 2). The analysis considered three development scenarios to assess the implications of alternative take-up scenarios of the Bromelton SDA, being a Main Development Scenario, Extended (or Protracted) Development Scenario (i.e. development take-up extended by 10 years than that anticipated under the main scenario) and an Accelerated Development Scenario (i.e. development take-up reduced by 10 years than that anticipated under the main scenario). It should be noted that the Main Development	6. Council does not support the employment planning benchmarks by industry allocated to the Scenic Rim, which underpins a number of policy areas of <i>ShapingSEQ</i>. In particular, the employment planning benchmarks has underestimated the rate of development anticipated to occur in the Bromelton SDA and subsequently, concerns are held regarding their use for infrastructure planning purposes. As outlined in submission item 4 above, it is considered that the planned transport and freight network identified in <i>ShapingSEQ</i> does not correlate to the demand expected to be generated by Bromelton. The failure to identify the ultimate infrastructure needs of the SDA may impact on the realisation of this growth. A review of the employment planning benchmarks for the Scenic Rim to accurately reflect development projected to occur in the Bromelton SDA is requested prior to the finalisation of

	Scenario is being relied upon by Queensland Urban Utilities in the planning and delivery of water cycle management infrastructure for Bromelton. The below table identifies the employment projected to occur under the three development scenarios to 2041. <table><tr><th></th><th>2026</th><th>2031</th><th>2036</th><th>2041</th></tr><tr><td>Main Development Scenario</td><td>1,324</td><td>3,790</td><td>6,871</td><td>10,021</td></tr><tr><td>Extended (or Protracted) Development Scenario</td><td>706</td><td>1,793</td><td>2,729</td><td>6,334</td></tr><tr><td>Accelerated Development Scenario</td><td>5,644</td><td>7,674</td><td>10,954</td><td>15,702</td></tr></table> Concerns are held that the employment planning benchmarks for the Scenic Rim included in <i>ShapingSEQ</i> does not reflect the employment expected to be generated by Bromelton, even under a low growth scenario. SCT Logistics commenced operations at their 130 hectare intermodal freight terminal in Bromelton in January 2017. The build out of this one intermodal facility in the SDA will create up to 1,000 jobs, which exceeds the employment projected to be generated in warehousing across the Scenic Rim during the life of <i>ShapingSEQ</i>. <i>ShapingSEQ</i> proposes to utilise a consistent set of regional growth assumptions (for both dwellings and employment) to coordinate and integrate the planning and delivery of infrastructure and services for the region. Council does not support the use of the projections for the Scenic Rim included in <i>ShapingSEQ</i> to inform infrastructure planning process as it significantly underestimates employment projected to occur in Bromelton and hence, will not appropriately reflect the infrastructure planning requirements (such as an upgraded freight network) necessary to support growth in the Bromelton SDA in the long-term. These benchmarks are particularly important having regard to their relationship with the infrastructure priorities reflected in <i>ShapingSEQ</i> and their ultimate reflection in future iterations of the <i>State Infrastructure Plan</i>.		2026	2031	2036	2041	Main Development Scenario	1,324	3,790	6,871	10,021	Extended (or Protracted) Development Scenario	706	1,793	2,729	6,334	Accelerated Development Scenario	5,644	7,674	10,954	15,702	<i>ShapingSEQ</i>. A review of the planned infrastructure identified in <i>ShapingSEQ</i> having regard to the revised employment benchmarks, in particular the freight network of the Connect theme, is subsequently requested to ensure that the planned infrastructure required to support the Bromelton SDA has been identified.
	2026	2031	2036	2041																		
Main Development Scenario	1,324	3,790	6,871	10,021																		
Extended (or Protracted) Development Scenario	706	1,793	2,729	6,334																		
Accelerated Development Scenario	5,644	7,674	10,954	15,702																		
6. Chapter 3, Part B - The Regional Growth Pattern Request for Inclusion of Warrill View within the Rural Living Area	Council seeks the inclusion of an expanded Warrill View in the Rural Living Area Regional Land Use Category. Figure 1 defines the spatial extent of Warrill View requested to be included in a Rural Living Area.	7. Council requests the State government's consideration of including an expanded Warrill View (being land identified in Figure 1) in																				

	On the 27 September 2013, the former Council resolved to provide its 'in principle' support to include part of the locality in the Rural Living Area under the current regional plan subject to a number of caveats, which included the requirement for a public consultation process and the submission of further detailed information. Council's support of the development proposal at the time stemmed from the identification of the locality as being suitable to accommodate future residential growth under the <i>Boonah Planning Scheme 2006</i> and also its previous recognition as an Investigation Area under a previous regional plan for similar purposes. A copy of Council's original resolution and the material that informed this resolution has been included in Appendix 3. Warrill View was nominated by the former Council (among other areas) in response to a request made by the state government to local governments to identify future growth areas for consideration as part of the regional plan review process. On the 27 January 2016, the former Council also resolved to adopt the draft Scenic Rim Planning Scheme for the purpose of State interest review. The Strategic Framework of the draft planning instrument identified Warrill View as an Investigation Area for future residential development, specifically for a future large lot residential community. The Strategic Framework outlined the planning matters required to be considered as part of any future investigation. The current Council continues to support the development intent proposed for Warrill View reflected in the Strategic Framework of the draft Scenic Rim Planning Scheme. The proposed Warrill View Rural Living Area is expected to provide additional choice and opportunities for large lot residential living in the region within proximity to the employment areas of Ipswich. The site benefits from direct access to the State-controlled road network, is able to be serviced by a reticulated water supply and can sustainably manage the treatment and disposal of waste water. Accordingly, Council supports the previous resolutions outlined above regarding the development intent sought for Warrill View and seeks the State government's consideration of including the land shown in Figure 1 in the Rural Living Area Regional Land Use Category.	the Rural Living Area Regional Land Use Category.
--	--	--

7. Chapter 3, Part B - The Regional Growth Pattern <i>Request for Inclusion of Lot 3 on SP120946, 34-38 Main Western Road, Tamborine Mountain within the Urban Footprint Regional Land Use Category.</i>	Council seeks the inclusion of land described as Lot 3 on SP120946, 34-38 Main Western Road, Tamborine Mountain (shown in Figure 2) in the Urban Footprint Regional Land Use Category. The subject lot adjoins an existing residential care facility (being Lot 16 on RP163756). An extension of the existing high care nursing facility on the subject lot has long been contemplated. The site is proposed to remain within the Rural Living Area under <i>ShapingSEQ</i>, where the establishment of a residential care facility will be prohibited development. There is currently an undersupply of residential care accommodation on the Tamborine Mountain plateau. The extension of the Urban Footprint in this instance will facilitate a small-scale expansion of an existing urban area and will seek to consolidate not fragment the urban activities and services on Tamborine Mountain. It is noted that the designation of the site as an urban area under the planning scheme (i.e. urban zone) would remove the regional plan regulatory provisions in any development assessment process. However, the site is nonetheless requested to be included in the Urban Footprint. The regulatory provisions of <i>ShapingSEQ</i> seek to make certain residential development prohibited in the Rural Living Area and Regional Landscape and Rural Production Area. This residential development includes Dual Occupancy (if both dwellings are not owned by the same person on one land title), Multiple Dwelling, Relocatable Home Park, Residential Care Facility, Retirement Facility, or Rooming Accommodation. A prohibition is considered to be a blunt instrument and does not cater for circumstances where a development's location outside an Urban Footprint may be justifiable and an overriding need in the public interest may exist. Whilst it is understood that the overriding needs provisions in the current regional plan State Planning Regulatory Provisions are not often used, it does provide a framework for proposals where an overriding need for the development may exist. Retention of the existing overriding needs test in the public interest is therefore requested to be retained for such development.	8. Council requests the State government's consideration of including Lot 3 on SP120946 (being land identified in Figure 2) in the Urban Footprint Regional Land Use Category. 9. Council requests the retention of the existing overriding needs test in the public interest for residential development (involving Dual Occupancy (if both dwellings are not owned by the same person on one land title), Multiple Dwelling, Relocatable Home Park, Residential Care Facility, Retirement Facility, or Rooming Accommodation) in the Rural Living Area and Regional Landscape and Rural Production Area Regional Land Use Category as opposed to the prohibition proposed under <i>ShapingSEQ</i>.
---	--	---

8. Chapter 3, Part B - The Regional Growth Pattern <i>Support of Submission from Wesley Mission Queensland Requesting Inclusion of Lot 162 on CC3601, within the Urban Footprint Regional Land Use Category.</i>	Council is in receipt of a submission from Wesley Mission Queensland seeking the inclusion of Lot 162 on CC3601, 60 North Street, Harrisville (shown in Figure 3) within the Urban Footprint Regional Land Use Category. An Urban Footprint expansion is sought in this instance to facilitate a proposed integrated and intergenerational rural retirement community. The development is intended to capitalise on its rural landscape setting by establishing a care facility with a rural focus for people with a connection with the land and for those seeking to remain in the area (i.e. age in place). In summary, the following facilities and services are intended to be provided over time: • Low rise retirement villas (approximately 80); • Residential aged care home for high care needs (approximately 36 places); • Supported accommodation (i.e. WesleyCare) for people living with a disability (approximately 15 places); • Respite care facility; • Supporting community facilities included community gardens, farming and rural activities, community development, Church uses and potential farm stay opportunities for Wesley Mission Queensland clients. There is currently a limited supply of retirement and residential care facilities in the Boonah Statistical Area, in particular for facilities that cater for high care needs. Residents requiring aged care or supported accommodation are often required to relocate from the region, generally to urban locations. The development proposes to offer care accommodation in a rural setting, which will assist resident's transition to a dependent living arrangement. The inclusion of the site in the Urban Footprint represents a logical expansion of the existing Harrisville Urban Footprint. The lot has direct access to the existing transport and reticulated water supply networks and is within close proximity to the higher-order medical facilities and services of Ipswich. Having regard to the need for care accommodation in the region coupled with the opportunity that the facility will provide residents to age in place, Council supports the submission from Wesley Mission Queensland and seeks the inclusion of the subject lot within the Harrisville Urban Footprint.	10. Council requests the State government's consideration of including Lot 162 on CC3601, 60 North Street, Harrisville (being land identified in Figure 3) in the Urban Footprint Regional Land Use Category.
---	---	---

Figure 1: Proposed Warrill View Rural Living Area

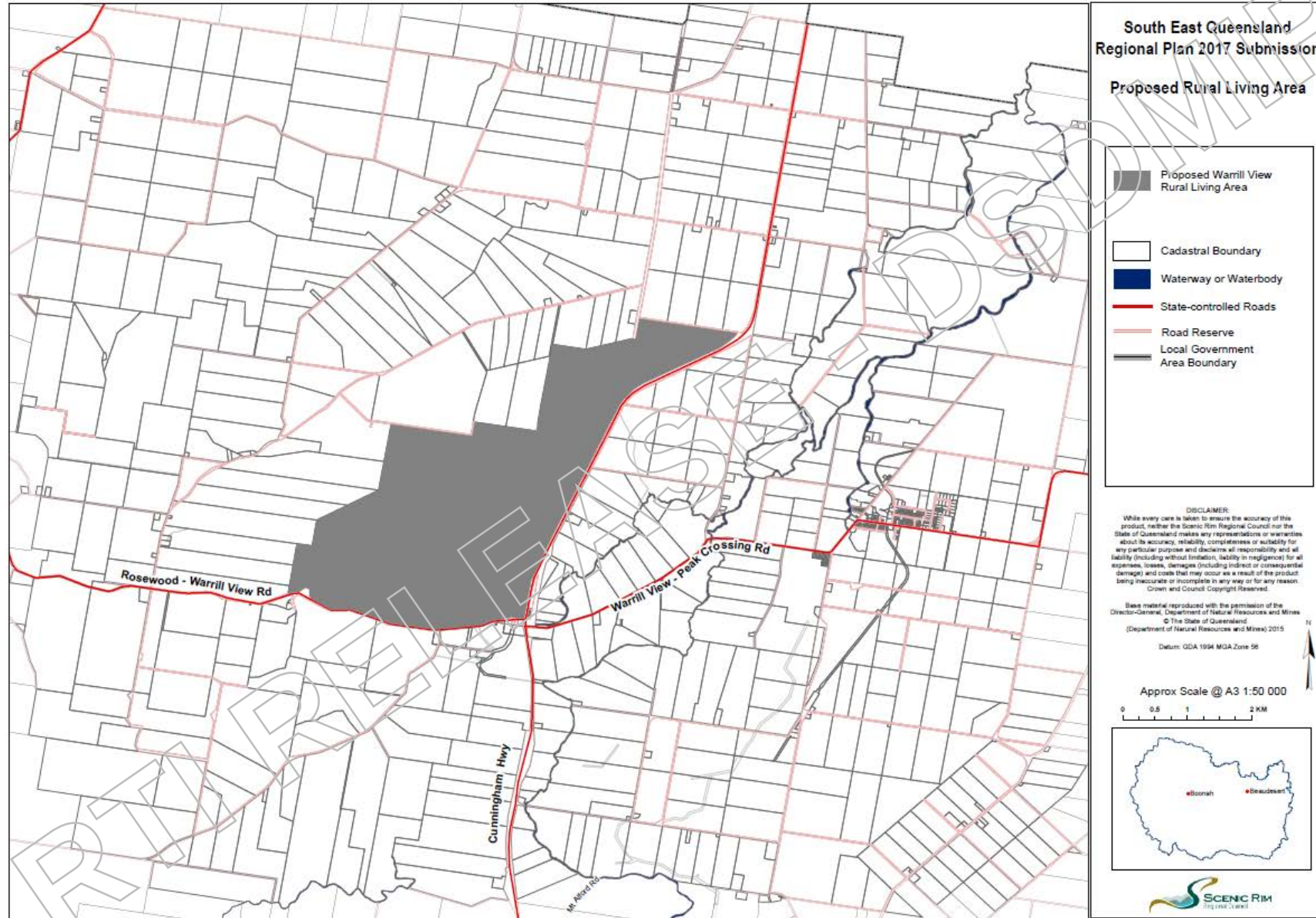


Figure 2: Proposed Urban Footprint Expansion to Include Lot 3 on SP120946, 34-38 Main Western Road, Tamborine Mountain

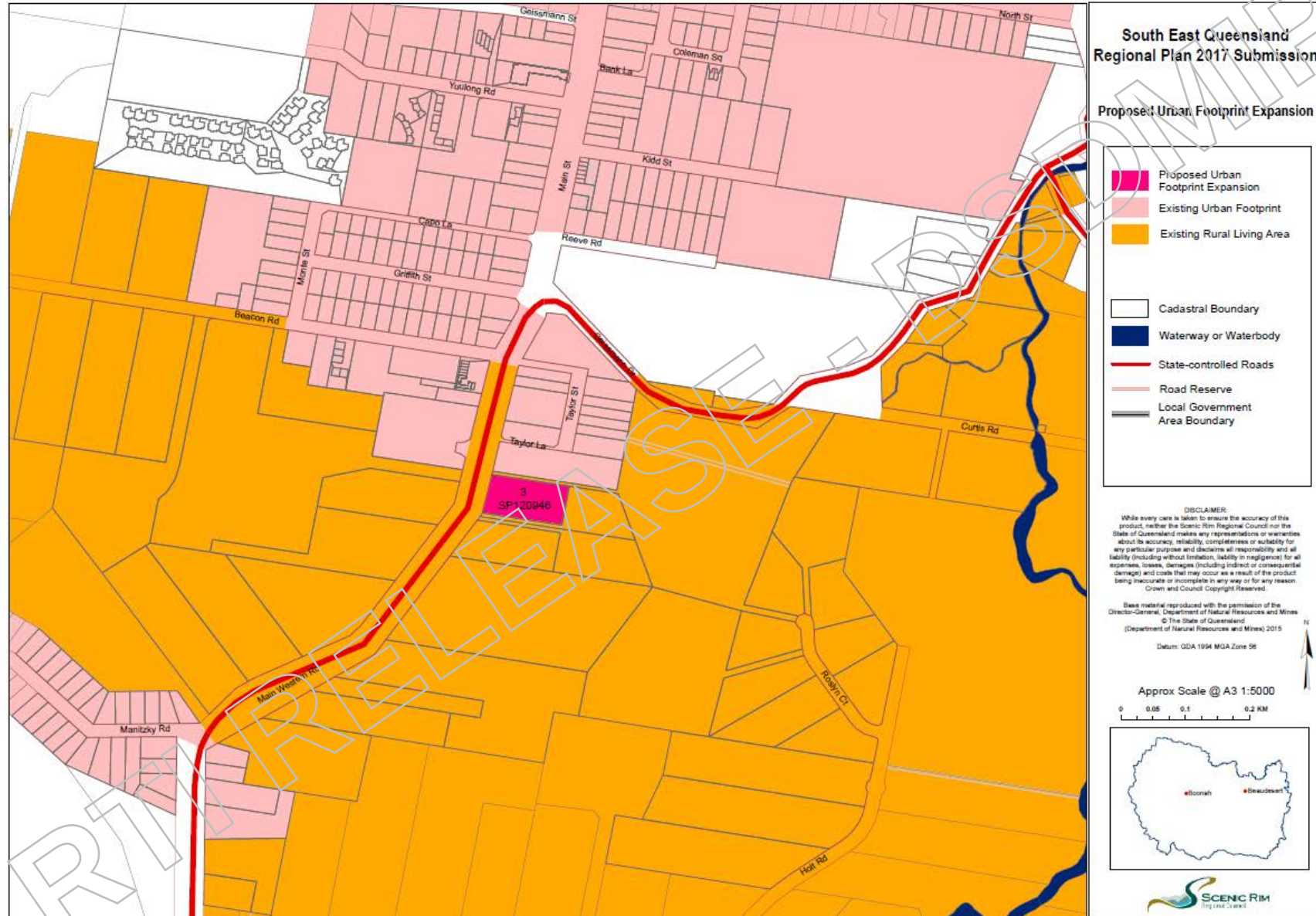
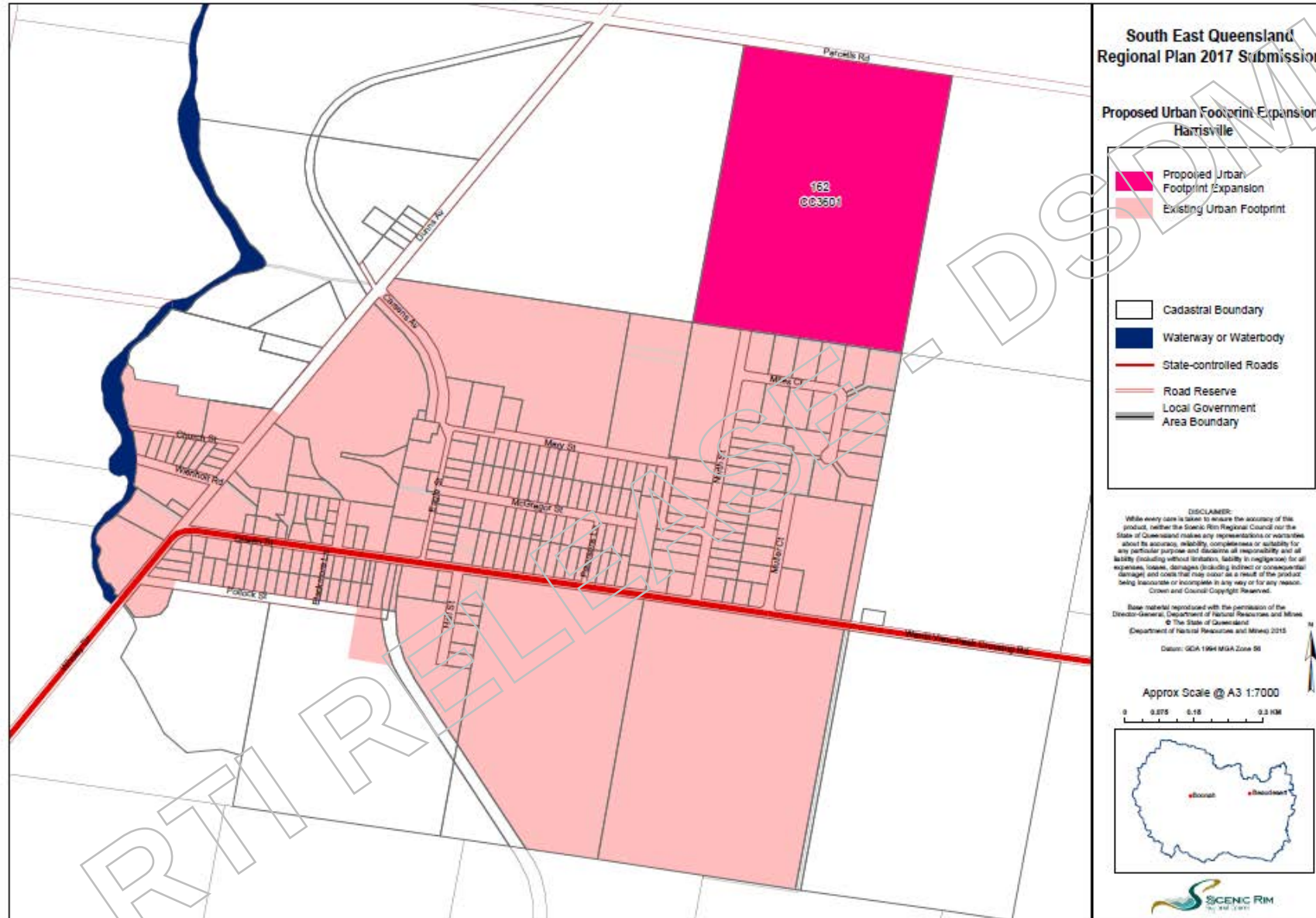


Figure 3: Proposed Urban Footprint Expansion to Include Lot 162 on CC3601, 60 North Street, Harrisville



**APPENDIX 1 - Recognition of Bromelton State Development Area under *ShapingSEQ* -
Draft South East Queensland Regional Plan dated October 2016**

RTI RELEASE - DSDMIP

Recognition of Bromelton State Development Area under *ShapingSEQ - Draft South East Queensland Regional Plan* dated October 2016

1. Introduction

In response to the *ShapingSEQ - Draft South East Queensland Regional Plan* released in October 2016, and currently on public display, this addendum to Council's submission specifically addresses the following concerns:

- The exclusion of the Bromelton State Development Area as an Area of Regional Economic Significance (ARES) in the Prosper theme of Chapter 3; and
- The oversight in the Connect theme of Chapter 3 of the priority road infrastructure between Bromelton and Woodhill as a potential future investigation route, which will be required to support the Bromelton SDA in time.

2. Overview of Bromelton State Development Area (SDA)

Located approximately six kilometres west of the town of Beaudesert, the Bromelton SDA comprises approximately 15,600 hectares and has long been identified as having the potential to develop as a significant industrial and employment node. Bromelton has been identified as a key node to meet a range of regional industry needs in the form of intermodal and/or rail freight facilities as well as 'difficult to locate' or large footprint industry uses. As a long term development, appropriate planning is essential to ensure the necessary infrastructure is developed and maintained to support Bromelton as a key industrial node not only for the Scenic Rim, but South East Queensland.

Development within Bromelton is guided by the 'Development Scheme for the Bromelton State Development Area'. Under the Development Scheme, the Bromelton SDA is envisaged to:

- Encourage the establishment of industrial activities of regional, state and national significance and supporting infrastructure;
- Maximise the utilisation of the rail network by providing multi-modal freight transport interchanges and facilities, and industries that require rail access;
- Support the establishment of suitable high impact and difficult to locate industries within appropriate locations;
- Ensure the continuation and establishment of rural uses in appropriate locations;
- Bring significant investment to the South East Queensland region facilitating long term employment;
- Encourage the coordination of public and private infrastructure projects; and
- Protect, and where possible, enhance the values of water supply catchments¹.

The Bromelton Structure Plan has also been developed by Council to provide the local community with a long term vision and understanding of the development potential of Bromelton. The Structure Plan Area comprises 2,716 hectares and is centrally located within the broader Bromelton SDA.

A number of significant industrial uses already operate within the Bromelton SDA (located within the Bromelton Structure Plan Area) including the Gelita gelatine factory, AJ Bush and Son's rendering plant, quarries and Scenic Rim Council's waste facility as illustrated in Figure 1 below.

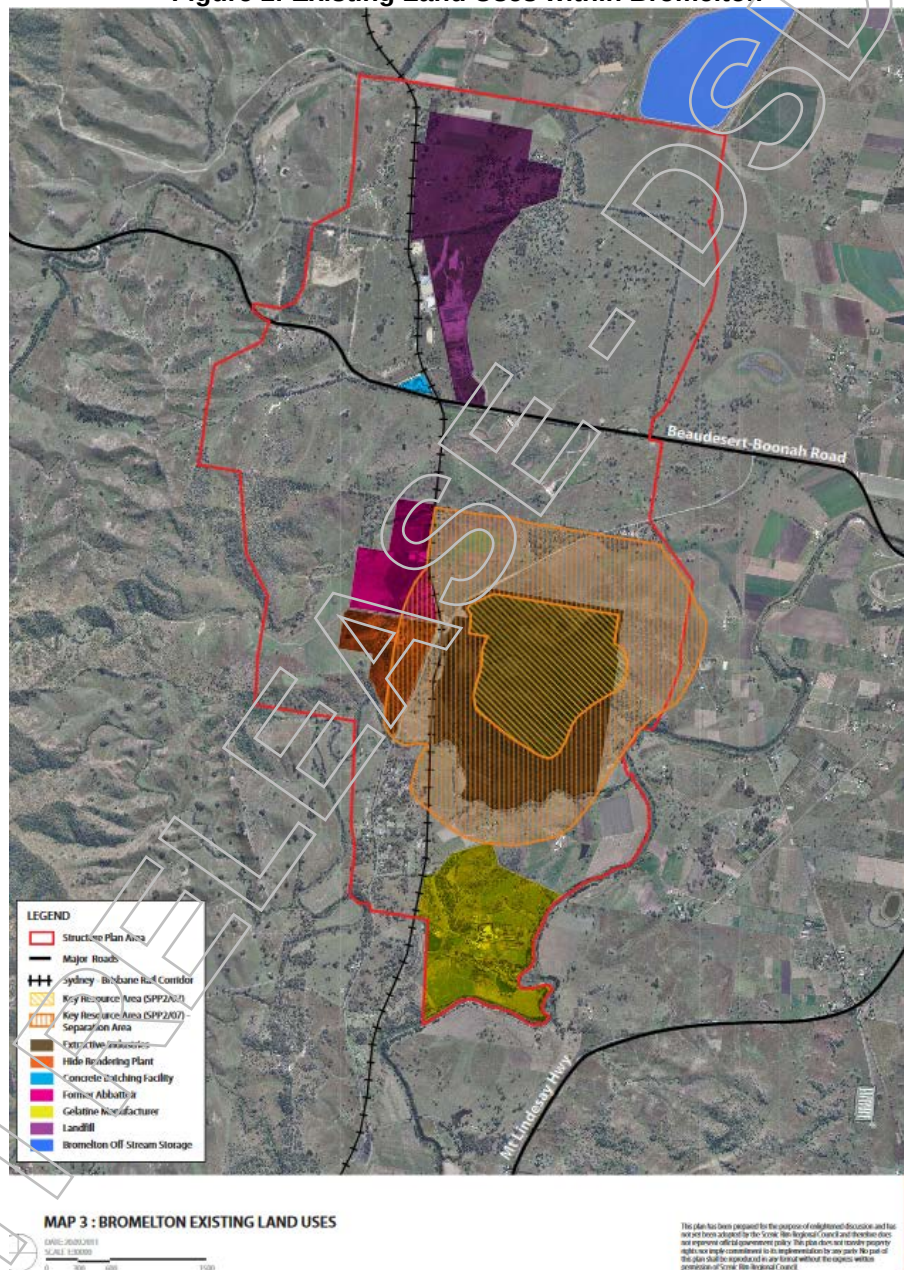
SCT Logistics commenced construction of a 130 hectare intermodal facility within the Bromelton SDA to be developed in several stages and is located on the dual gauge rail line between Brisbane and Sydney. Upon completion, SCT Logistics is anticipated to employ approximately 1,000 workers. The SCT Logistics intermodal facility connects to the existing standard gauge interstate rail line and will

¹ p.11 Bromelton State Development Area Development Scheme, Section 4 Strategic vision for the BSDA, November 2012

allow SCT Logistics to connect with their intermodal facilities located interstate. The intermodal facility at Bromelton will allow future businesses to locate their operations on a major rail head and enhance rail transport and connectivity. The first stage of the intermodal facility was completed in January 2017.

SCT Logistics are not the only major rail entity with interests in Bromelton. The Australian Rail Track Corporation (ARTC) recently purchased significant land holdings (approximately 850 hectares) within the Bromelton SDA. Although no immediate plans have been identified, acquisition of land by ARTC further highlights the importance of the Bromelton SDA as a significant industrial node and in particular intermodal and/or rail freight facilities. ARTC has been identified as the delivery agent for the construction elements of the inland rail project, which will see the development of an inland rail freight corridor between Brisbane and Melbourne.

Figure 1: Existing Land Uses within Bromelton



Source: Bromelton Structure Plan November 2012

3. Employment within Bromelton SDA

Development within the Bromelton SDA to date has been concentrated within the Bromelton Structure Plan Area. Overall, the Bromelton SDA is expected to yield ~943 hectares of industrial allotments with development anticipated to include a range of industrial land uses including:

- *Major industry*: medium to high impact industry, generally occupying sites in excess of one hectare (potential allotment yield of approximately 617 hectares);
- *Rail dependent industry*: large footprint industry that requires direct access to rail facilities (potential allotment yield of approximately 244 hectares);
- *Rail sidings*: rail loops and spur lines to facilitate the (un)loading of rail based freight (potential allotment yield of approximately 58 hectares);
- *Corporate logistics*: typically national based transport and logistic centres (potential allotment yield of approximately 18 hectares); and
- *Local service centre*: a retail and business hub that provides retail and commercial services to workers and businesses (potential allotment yield of approximately 6 hectares).

An assessment of employment capacity (based on employment density of workers per hectare) of the Bromelton Structure Plan Area indicates that at build out, Bromelton is anticipated to yield **24,802 workers** consisting of:

- *Major Industry*: ~18,510 workers;
- *Rail dependent industry*: ~4,870 workers;
- *Rail sidings*: ~290 workers;
- *Corporate logistics*: ~552 workers; and
- *Local service centre*: ~580 workers.

Projections contained within *ShapingSEQ* only anticipate minimal growth in industrial sectors (transport, postal and warehousing; wholesale trade; and manufacturing) within the Scenic Rim. With an anticipated employment of approximately 24,800 workers at build out, it is considered that Bromelton represents a future ARES. Bromelton's exclusion from being identified as a future ARES and the low employment growth projected by *ShapingSEQ* represents a major oversight. According to the *ShapingSEQ* employment projections, total employment growth within the Scenic Rim is projected to increase from 14,171 workers to 21,781 workers between 2016 and 2041, a total increase of 7,610 workers. Employment within industrial sectors for the Scenic Rim is significantly understated by the *ShapingSEQ* projections. Between 2016 and 2041, employment growth in industrial sectors is projected to increase from 442 workers to 604 workers in the transport, postal and warehousing sector; from 334 workers to 396 workers in the wholesale trade sector; and from 893 workers to 1,210 workers in the manufacturing sector. The *ShapingSEQ* employment projections appear to not only ignore the employment implications associated with the development of the Bromelton SDA and the intent of the area, but also the significant investment currently being made at Bromelton.

The significant employment growth anticipated within the development of the Bromelton SDA highlights the areas' local and regional importance, which has not been reflected in the employment projections contained within *ShapingSEQ* for the Scenic Rim. The introduction of the SCT Logistics intermodal facility to Bromelton provides a significant opportunity and further highlights Bromelton's role in transport and logistics at the local, regional and national level. The employment projections outlined within the *ShapingSEQ* (particularly in relation to industrial sectors) for the Scenic Rim are considered to be significantly understated and should not be relied upon.

4. Bromelton SDA - Value Add

The projected employment profile for Bromelton can be converted to an indicative annual value added of business activity at Bromelton. This can be calculated by applying an annual value added per employee measure derived from national accounts data.² The annual value added per employee estimate applied is as follows:

- Major Industry: ~\$77,000 per worker;
- Rail Dependent Industry: ~\$93,300 per worker;
- Rail Sidings: ~\$75,400 per worker;
- Corporate Logistics: ~\$92,500 per worker; and
- Local Services Centre: ~\$39,000 per worker.

Upon build out, Bromelton is anticipated to generate ~\$1,975.2 million in annual value added, comprising:

- Major Industry: \$1,425.3 million;
- Rail Dependent Industry: \$454.4 million;
- Rail Sidings: \$21.9 million;
- Corporate Logistics: \$51.1 million; and
- Local Services Centre: \$22.6 million.

The above analysis further illustrates the economic significance and contribution to the region from the Bromelton SDA.

5. Commitment to Key Infrastructure Projects

There have been a number of key infrastructure projects committed to by both the State government and Council to assist in the long term development of Bromelton. This includes the construction of a trunk water main to service the Bromelton SDA and the construction of the Beaudesert Town Centre Bypass.

The construction of the trunk water main project is a joint funding project between the State government, Council and Queensland Urban Utilities. Construction of the 6.1 kilometre trunk water main commenced in late 2016 and is anticipated to be operational by April 2017. The trunk water main will connect the Bromelton SDA with the Beaudesert Water Treatment plant and is expected to provide reticulated water to the Bromelton SDA. The construction of this critical infrastructure will underpin future economic and development opportunities within the Bromelton SDA.

Construction of the Beaudesert Town Centre Bypass has commenced and is intended to divert heavy vehicles around the Beaudesert town centre. The development of the Beaudesert Town Centre Bypass will provide a dedicated route for heavy vehicles servicing Beaudesert and the Bromelton SDA. The bypass will provide critical transport infrastructure to service increasing freight demands of the Bromelton SDA as it continues to develop.

The above projects highlight Council's commitment to investing in key infrastructure to underpin the development of Bromelton as a key industrial node not only for the Scenic Rim but the broader South East Queensland.

Freight volumes on the Australian east coast are expected to more than double over the medium to long term, however existing freight networks are insufficient to cope with the demand. The existing east coast rail network accounts for only 30% of freight due to limits imposed by a range of

² ABS Australian National Accounts Data: Input – Output Tables -212-13, Catalogue No. 5209.0.55.001

constraints. ARTC highlights that where competitive road services exist (such as the Melbourne to Perth rail line); rail is dominant, accounting for more than 80% of freight load. The development of the inland rail is envisaged to deliver a road competitive service that increases the share of rail freight on the east coast. The inland rail project has the potential to significantly change the competitive environment of the eastern seaboard freight.

In addition, the inland rail project is identified as a priority project for Queensland being coordinated by the Department of Infrastructure and Regional Development (federal government). The development of the inland rail will provide a direct freight rail corridor between Melbourne and Brisbane that will connect South East Queensland with Melbourne and provide more direct links with Adelaide and Perth. The inland rail route comprises approximately 1,700 kilometres and consists of enhancements of 700 kilometres of existing interstate track, major upgrades to 400 kilometres of track and the construction of 600 kilometres of new track. The current inland route alignment connects on the northern extremity of the Bromelton SDA and connects with existing rail infrastructure to Acacia Ridge. The inland rail project will further enhance the Bromelton SDA's connectivity with rail and provide increased competitive flow on benefits of freight and logistics operations within the Bromelton SDA as it continues to develop.

6. Workforce Profile - Data and Analysis

Working population data has been utilised to obtain an understanding of the workforce profile of the Scenic Rim by SA2. The Scenic Rim consists of three SA2s including Tamborine – Canungra, Boonah, and Beaudesert. The Bromelton SDA is located within the Beaudesert SA2.

As a major employment node, the Bromelton SDA is anticipated to generate significant employment within industrial sectors such as manufacturing, construction, wholesale trade, transport, postal and warehousing. The Bromelton SDA is located within the Beaudesert SA2.

Working Population

An examination of working population data provides an overview of the economic structure of the Scenic Rim and in particular the Beaudesert SA2 (for which the Bromelton SDA is located) relative to South East Queensland.

Table 1 below summarises the distribution of the working population (based on employment by industry and place of work data) for each SA2 within the Scenic Rim compared to South East Queensland based on 2011 Census data.

Table 1: Working Population Industry Share of Employment by SA2, Scenic Rim, South East Queensland, 2011

Industry of Employment	Tamborine - Canungra	Boonah	Beaudesert	SEQ
Agriculture, forestry and fishing				
Agriculture, Forestry and Fishing, nfd	0.2%	0.2%	0.2%	0.0%
Agriculture	5.5%	21.2%	11.2%	0.8%
Aquaculture	0.0%	0.3%	0.0%	0.0%
Forestry and Logging	0.0%	0.0%	0.0%	0.0%
Fishing, Hunting and Trapping	0.0%	0.0%	0.0%	0.0%
Agriculture, Forestry and Fishing Support Services	0.5%	0.4%	0.2%	0.1%
Total	6.1%	22.0%	11.6%	0.9%
Mining				
Mining, nfd	0.2%	0.0%	0.0%	0.1%
Coal Mining	0.0%	0.0%	0.4%	0.2%
Oil and Gas Extraction	0.0%	0.0%	0.0%	0.2%
Metal Ore Mining	0.1%	0.0%	0.1%	0.1%
Non-Metallic Mineral Mining and Quarrying	0.0%	0.2%	0.6%	0.1%
Exploration and Other Mining Support Services	0.0%	0.0%	0.1%	0.2%
Total	0.3%	0.2%	1.2%	0.9%
Manufacturing				
Manufacturing, nfd	0.6%	0.3%	0.6%	0.8%
Food Product Manufacturing	0.6%	2.0%	3.6%	1.7%
Beverage and Tobacco Product Manufacturing	1.0%	0.1%	0.0%	0.2%

Industry of Employment	Tamborine - Canungra	Boonah	Beaudesert	SEQ
Textile, Leather, Clothing and Footwear Manufacturing	0.3%	0.2%	0.4%	0.3%
Wood Product Manufacturing	0.1%	0.4%	0.6%	0.4%
Pulp, Paper and Converted Paper Product Manufacturing	0.0%	0.0%	0.0%	0.1%
Printing (including the Reproduction of Recorded Media)	0.2%	0.1%	0.1%	0.3%
Petroleum and Coal Product Manufacturing	0.0%	0.0%	0.1%	0.1%
Basic Chemical and Chemical Product Manufacturing	0.2%	0.5%	0.5%	0.3%
Polymer Product and Rubber Product Manufacturing	0.0%	0.1%	0.2%	0.4%
Non-Metallic Mineral Product Manufacturing	0.1%	0.1%	0.8%	0.4%
Primary Metal and Metal Product Manufacturing	0.1%	0.1%	0.4%	0.7%
Fabricated Metal Product Manufacturing	0.2%	0.2%	0.3%	0.8%
Transport Equipment Manufacturing	0.2%	0.5%	0.3%	0.8%
Machinery and Equipment Manufacturing	0.7%	0.4%	0.3%	1.1%
Furniture and Other Manufacturing	0.3%	0.2%	0.2%	0.5%
<i>Total</i>	<i>4.7%</i>	<i>5.2%</i>	<i>8.5%</i>	<i>9.0%</i>
Electricity, Gas, Water and Waste Services				
Electricity, Gas, Water and Waste Services, nfd	0.0%	0.0%	0.0%	0.0%
Electricity Supply	0.2%	0.6%	0.7%	0.6%
Gas Supply	0.2%	0.0%	0.0%	0.0%
Water Supply, Sewerage and Drainage Services	0.2%	0.5%	0.8%	0.3%
Waste Collection, Treatment and Disposal Services	0.2%	0.2%	0.3%	0.2%
<i>Total</i>	<i>0.7%</i>	<i>1.3%</i>	<i>1.8%</i>	<i>1.2%</i>
Construction				
Construction, nfd	0.1%	0.1%	0.1%	0.2%
Building Construction	1.9%	2.2%	1.3%	2.2%
Heavy and Civil Engineering Construction	0.3%	1.6%	1.5%	0.8%
Construction Services	5.0%	3.9%	3.1%	3.6%
<i>Total</i>	<i>7.3%</i>	<i>7.8%</i>	<i>6.0%</i>	<i>6.8%</i>
Wholesale Trade				
Wholesale Trade, nfd	0.2%	0.1%	0.1%	0.2%
Basic Material Wholesaling	0.9%	2.3%	1.0%	0.9%
Machinery and Equipment Wholesaling	0.1%	1.2%	0.6%	1.0%
Motor Vehicle and Motor Vehicle Parts Wholesaling	0.0%	0.0%	0.1%	0.4%
Grocery, Liquor and Tobacco Product Wholesaling	0.1%	1.0%	0.5%	0.7%
Other Goods Wholesaling	0.2%	0.3%	0.2%	0.8%
Commission-Based Wholesaling	0.0%	0.2%	0.1%	0.1%
<i>Total</i>	<i>1.5%</i>	<i>5.1%</i>	<i>2.5%</i>	<i>4.2%</i>
Retail Trade				
Retail Trade, nfd	0.7%	0.5%	0.4%	0.4%
Motor Vehicle and Motor Vehicle Parts Retailing	0.1%	0.3%	1.5%	0.9%
Fuel Retailing	0.5%	1.5%	0.8%	0.3%
Food Retailing	4.6%	3.5%	3.7%	3.4%
Other Store-Based Retailing	4.6%	4.7%	3.9%	6.2%
Non-Store Retailing and Retail Commission-Based Buying and/or Selling	0.1%	0.0%	0.0%	0.1%
<i>Total</i>	<i>10.6%</i>	<i>10.5%</i>	<i>10.2%</i>	<i>11.3%</i>
Accommodation and Food Services				
Accommodation and Food Services, nfd	0.0%	0.0%	0.0%	0.0%
Accommodation	6.4%	1.1%	1.6%	1.3%
Food and Beverage Services	10.6%	6.7%	5.1%	5.8%
<i>Total</i>	<i>17.0%</i>	<i>7.8%</i>	<i>6.7%</i>	<i>7.1%</i>
Transport, Postal and Warehousing				
Transport, Postal and Warehousing, nfd	0.1%	0.2%	0.2%	0.1%
Road Transport	1.5%	3.3%	2.6%	2.2%
Rail Transport	0.0%	0.1%	0.0%	0.6%
Water Transport	0.0%	0.0%	0.0%	0.1%
Air and Space Transport	0.0%	0.0%	0.0%	0.6%
Other Transport	0.0%	0.0%	0.1%	0.1%
Postal and Courier Pick-up and Delivery Services	0.7%	0.9%	0.5%	0.6%
Transport Support Services	0.0%	0.0%	0.1%	0.7%
Warehousing and Storage Services	0.0%	0.0%	0.0%	0.2%
<i>Total</i>	<i>2.3%</i>	<i>4.5%</i>	<i>3.6%</i>	<i>5.0%</i>
Information Media and Telecommunications				
Information Media and Telecommunications, nfd	0.0%	0.0%	0.0%	0.0%
Publishing (except Internet and Music Publishing)	0.5%	0.4%	1.2%	0.4%
Motion Picture and Sound Recording Activities	0.4%	0.0%	0.0%	0.2%
Broadcasting (except Internet)	0.0%	0.0%	0.2%	0.2%
Internet Publishing and Broadcasting	0.0%	0.0%	0.0%	0.0%
Telecommunications Services	0.1%	0.1%	0.2%	0.5%
Internet Service Providers, Web Search Portals and Data	0.1%	0.0%	0.0%	0.1%

Industry of Employment	Tamborine - Canungra	Boonah	Beaudesert	SEQ
Processing Services				
Library and Other Information Services	0.0%	0.0%	0.1%	0.1%
<i>Total</i>	<i>1.1%</i>	<i>0.5%</i>	<i>1.6%</i>	<i>1.5%</i>
Financial and Insurance Services				
Financial and Insurance Services, nfd	0.1%	0.0%	0.1%	0.1%
Finance	0.4%	0.7%	1.1%	1.4%
Insurance and Superannuation Funds	0.1%	0.4%	0.1%	1.0%
Auxiliary Finance and Insurance Services	0.3%	0.3%	0.1%	1.0%
<i>Total</i>	<i>0.9%</i>	<i>1.3%</i>	<i>1.4%</i>	<i>3.5%</i>
Rental, Hiring and Real Estate Services				
Rental, Hiring and Real Estate Services, nfd	0.0%	0.0%	0.1%	0.0%
Rental and Hiring Services (except Real Estate)	0.3%	0.4%	0.2%	0.5%
Property Operators and Real Estate Services	2.1%	0.8%	0.9%	1.6%
<i>Total</i>	<i>2.4%</i>	<i>1.1%</i>	<i>1.2%</i>	<i>2.1%</i>
Professional, Scientific and Technical Services				
Professional, Scientific and Technical Services, nfd	0.0%	0.0%	0.0%	0.0%
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	5.9%	2.5%	2.8%	6.8%
Computer System Design and Related Services	1.0%	0.2%	0.1%	1.4%
<i>Total</i>	<i>6.9%</i>	<i>2.7%</i>	<i>2.9%</i>	<i>8.2%</i>
Administrative and Support Services				
Administrative and Support Services, nfd	0.0%	0.0%	0.0%	0.0%
Administrative Services	1.6%	0.3%	0.6%	1.9%
Building Cleaning, Pest Control and Other Support Services	2.0%	0.6%	0.8%	1.1%
<i>Total</i>	<i>3.6%</i>	<i>0.9%</i>	<i>1.3%</i>	<i>3.0%</i>
Public Administration and Safety				
Public Administration and Safety, nfd	0.0%	0.0%	0.0%	0.0%
Public Administration	0.6%	2.5%	6.8%	4.7%
Defence	9.0%	0.0%	0.0%	0.6%
Public Order, Safety and Regulatory Services	0.7%	0.5%	1.3%	1.7%
<i>Total</i>	<i>10.3%</i>	<i>3.0%</i>	<i>8.1%</i>	<i>7.0%</i>
Education and Training				
Education and Training, nfd	0.4%	0.2%	0.1%	0.2%
Preschool and School Education	7.7%	7.4%	8.7%	5.4%
Tertiary Education	0.4%	0.3%	0.2%	2.3%
Adult, Community and Other Education	1.3%	1.3%	1.1%	0.8%
<i>Total</i>	<i>9.8%</i>	<i>9.2%</i>	<i>10.1%</i>	<i>8.7%</i>
Health Care and Social Assistance				
Health Care and Social Assistance, nfd	0.2%	0.4%	0.5%	0.4%
Hospitals	0.0%	2.2%	1.7%	4.6%
Medical and Other Health Care Services	3.4%	2.0%	2.8%	3.3%
Residential Care Services	1.2%	3.4%	4.9%	1.9%
Social Assistance Services	2.2%	2.1%	4.7%	2.9%
<i>Total</i>	<i>7.0%</i>	<i>10.1%</i>	<i>14.6%</i>	<i>13.1%</i>
Arts and Recreation Services				
Arts and Recreation Services, nfd	0.0%	0.0%	0.0%	0.0%
Heritage Activities	0.5%	0.6%	0.2%	0.1%
Creative and Performing Arts Activities	0.8%	0.2%	0.1%	0.3%
Sports and Recreation Activities	1.4%	0.5%	1.5%	0.9%
Gambling Activities	0.0%	0.0%	0.0%	0.3%
<i>Total</i>	<i>2.7%</i>	<i>1.2%</i>	<i>1.7%</i>	<i>1.6%</i>
Other Services				
Other Services, nfd	0.0%	0.0%	0.0%	0.0%
Repair and Maintenance	1.6%	2.2%	1.9%	1.7%
Personal and Other Services	2.0%	2.0%	1.8%	2.2%
Private Households Employing Staff and Undifferentiated Goods and Service-Producing Activities of Households for Own Use	0.0%	0.0%	0.0%	0.0%
<i>Total</i>	<i>3.6%</i>	<i>4.2%</i>	<i>3.7%</i>	<i>3.9%</i>
Inadequately described	38	32	57	12,057
Not stated/not applicable	0	7	4	547
<i>Total</i>	<i>3,293</i>	<i>3,049</i>	<i>4,615</i>	<i>1,257,543</i>

Source: Australian Bureau of Statistics Census of Population and Housing, 2011
Note: nfd refers to 'not further defined'

7. Industry Specialisation

The following provides an examination of industry specialisation within the Scenic Rim and in particular the Beaudesert SA2 (which encompasses the Bromelton SDA).

Location Quotient Analysis

Location quotients are ratios utilised to identify specialised industries within the local economy. A location quotient greater than one indicates an industry sector more concentrated in the local economy than in the comparative regional economy.

Location quotients have been utilised to assess the industry concentration in each of the SA2s within the Scenic Rim, relative to South East Queensland derived from working population data and is presented in Table 2 below. Table 2 provides a detailed breakdown of location quotient by industry sector relative to South East Queensland by SA2 within the Scenic Rim. The location quotients for each SA2 of the region are also illustrated in Figure 2.

Table 3 summarises the key industry sectors that recorded a location quotient greater than one (left hand side) to identify specialised industries within the local economy within the Beaudesert SA2. Further refinement of industry specialisation was undertaken to identify those key industry sectors with a location quotient greater than 1.5 (in line with the specialisation classification outlined in the *ShapingSEQ* Technical Note to Areas of Regional Economic Significance).

Based on an assessment of industry specialisation, **Beaudesert SA2** recorded a **location quotient greater than one** within **37 industry sectors** generally characterised as follows:

- Agriculture, Forestry and Fishing: agriculture, forestry and fishing nfd; agriculture; agriculture, forestry and fishing support services;
- Mining: coal mining, metal ore mining; non-metallic mineral mining and quarrying;
- Manufacturing: food product manufacturing; textile, leather, clothing and footwear manufacturing; wood product manufacturing, petroleum and coal product manufacturing; basic chemical and chemical product manufacturing; non-metallic mineral product manufacturing;
- Electricity, Gas, Water and Waste Services: electricity supply; water supply, sewerage and drainage services; waste collection, treatment and disposal services;
- Construction: heavy and civil engineering construction;
- Wholesale Trade: basic material wholesaling; commission based wholesaling;
- Retail Trade: fuel retailing; food retailing;
- Accommodation and Food Services: accommodation;
- Transport, Postal and Warehousing: transport, postal and warehousing nfd; road transport; other transport;
- Information Media and Telecommunications: publishing (except internet and music publishing); library and other information services;
- Rental, Hiring and Real Estate Services: rental, hiring and real estate services, nfd;
- Public Administration and Safety: public administration;
- Education and Training: preschool and school education; adult, community and other education;
- Healthcare and Social Assistance: health care and social assistance nfd; residential care services; social assistance services;

- Arts and Recreation Services: heritage activities; sport and recreation activities; and
- Other Services: repair and maintenance.

Further analysis of industry specialisation (i.e. a location quotient greater than 1.5) reduced the number of industry specialisation to a total of 21 industry sectors consisting of:

- Agriculture, Forestry and Fishing: agriculture, forestry and fishing nfd; agriculture, agriculture, forestry and fishing support services;
- Mining: coal mining; non-metallic mineral mining and quarrying;
- Manufacturing: food product manufacturing; wood product manufacturing; non-metallic mineral product manufacturing;
- Electricity, Gas, Water and Waste Services: water supply, sewerage and drainage services;
- Construction: heavy and civil engineering construction;
- Retail Trade: motor vehicle and motor vehicle parts retailing; fuel retailing;
- Transport, Postal and Warehousing: transport, postal and warehousing nfd; other transport;
- Information Media and Telecommunications: publishing (except internet and music publishing); library and other information services;
- Rental, Hiring and Real Estate Service: rental, hiring and real estate services nfd;
- Education and Training: preschool and school education;
- Healthcare and Social Assistance: residential care services; social assistance services; and
- Arts and Recreation Services: sports and recreation activities.

Table 2: Location Quotient Analysis Relative to SEQ by SA2, Scenic Rim, 2011

Industry of Employment	Tamborine - Canungrua	Boonah	Beaudesert
Agriculture, forestry and fishing			
Agriculture, Forestry and Fishing, nfd	15.4	16.6	19.8
Agriculture	7.2	27.9	14.8
Aquaculture	0.0	21.3	0.0
Forestry and Logging	0.0	0.0	0.0
Fishing, Hunting and Trapping	0.0	0.0	0.0
Agriculture, Forestry and Fishing Support Services	8.3	6.8	3.0
<i>Total</i>	<i>7.0</i>	<i>25.2</i>	<i>13.3</i>
Mining			
Mining, nfd	2.6	0.0	0.0
Coal Mining	0.0	0.0	1.8
Oil and Gas Extraction	0.0	0.0	0.0
Metal Ore Mining	1.1	0.0	1.0
Non-Metallic Mineral Mining and Quarrying	0.0	2.3	8.1
Exploration and Other Mining Support Services	0.0	0.0	0.5
<i>Total</i>	<i>0.3</i>	<i>0.2</i>	<i>1.3</i>
Manufacturing			
Manufacturing, nfd	0.8	0.3	0.7
Food Product Manufacturing	0.3	1.2	2.1
Beverage and Tobacco Product Manufacturing	5.8	0.8	0.0
Textile, Leather, Clothing and Footwear Manufacturing	1.0	0.6	1.2
Wood Product Manufacturing	0.3	0.9	1.6
Pulp, Paper and Converted Paper Product Manufacturing	0.0	0.0	0.0
Printing (including the Reproduction of Recorded Media)	0.7	0.4	0.3
Petroleum and Coal Product Manufacturing	0.0	0.0	1.0
Basic Chemical and Chemical Product Manufacturing	0.7	1.4	1.4
Polymer Product and Rubber Product Manufacturing	0.0	0.3	0.6

Industry of Employment	Tamborine - Canungrua	Boonah	Beaudesert
Non-Metallic Mineral Product Manufacturing	0.3	0.3	1.7
Primary Metal and Metal Product Manufacturing	0.2	0.1	0.6
Fabricated Metal Product Manufacturing	0.2	0.2	0.3
Transport Equipment Manufacturing	0.3	0.7	0.4
Machinery and Equipment Manufacturing	0.7	0.3	0.3
Furniture and Other Manufacturing	0.6	0.4	0.5
<i>Total</i>	0.5	0.6	0.9
Electricity, Gas, Water and Waste Services			
Electricity, Gas, Water and Waste Services, nfd	0.0	0.0	0.0
Electricity Supply	0.3	1.1	1.3
Gas Supply	5.1	0.0	0.0
Water Supply, Sewerage and Drainage Services	0.6	1.7	2.5
Waste Collection, Treatment and Disposal Services	0.9	0.7	1.2
<i>Total</i>	0.6	1.1	1.5
Construction			
Construction, nfd	0.4	0.6	0.6
Building Construction	0.9	1.0	0.6
Heavy and Civil Engineering Construction	0.4	2.0	1.9
Construction Services	1.4	1.1	0.8
<i>Total</i>	1.1	1.2	0.9
Wholesale Trade			
Wholesale Trade, nfd	0.7	0.4	0.3
Basic Material Wholesaling	1.0	2.6	1.1
Machinery and Equipment Wholesaling	0.1	1.1	0.6
Motor Vehicle and Motor Vehicle Parts Wholesaling	0.0	0.0	0.2
Grocery, Liquor and Tobacco Product Wholesaling	0.1	1.4	0.6
Other Goods Wholesaling	0.3	0.4	0.2
Commission-Based Wholesaling	0.0	3.0	1.2
<i>Total</i>	0.4	1.2	0.6
Retail Trade			
Retail Trade, nfd	1.6	1.2	0.9
Motor Vehicle and Motor Vehicle Parts Retailing	0.1	0.3	1.6
Fuel Retailing	1.7	5.4	2.7
Food Retailing	1.3	1.0	1.1
Other Store-Based Retailing	0.7	0.8	0.6
Non-Store Retailing and Retail Commission-Based Buying and/or Selling	1.6	0.0	0.0
<i>Total</i>	0.9	0.9	0.9
Accommodation and Food Services			
Accommodation and Food Services, nfd	0.0	0.0	0.0
Accommodation	4.8	0.9	1.2
Food and Beverage Services	1.8	1.2	0.9
<i>Total</i>	2.4	1.1	0.9
Transport, Postal and Warehousing			
Transport, Postal and Warehousing, nfd	1.3	3.2	2.7
Road Transport	0.7	1.5	1.2
Rail Transport	0.0	0.2	0.0
Water Transport	0.0	0.0	0.0
Air and Space Transport	0.0	0.0	0.0
Other Transport	0.0	0.0	2.0
Postal and Courier Pick-up and Delivery Services	1.2	1.5	0.9
Transport Support Services	0.0	0.0	0.1
Warehousing and Storage Services	0.0	0.0	0.0
<i>Total</i>	0.5	0.9	0.7
Information Media and Telecommunications			
Information Media and Telecommunications, nfd	0.0	0.0	0.0
Publishing (except Internet and Music Publishing)	1.2	1.0	3.0
Motion Picture and Sound Recording Activities	2.1	0.0	0.0
Broadcasting (except Internet)	0.0	0.0	0.9
Internet Publishing and Broadcasting	0.0	0.0	0.0
Telecommunications Services	0.2	0.2	0.3
Internet Service Providers, Web Search Portals and Data Processing Services	1.4	0.0	0.0
Library and Other Information Services	0.0	0.0	1.8
<i>Total</i>	0.7	0.3	1.1
Financial and Insurance Services			
Financial and Insurance Services, nfd	0.9	0.0	0.9
Finance	0.3	0.5	0.8
Insurance and Superannuation Funds	0.1	0.4	0.1
Auxiliary Finance and Insurance Services	0.3	0.3	0.1
<i>Total</i>	0.3	0.4	0.4
Rental, Hiring and Real Estate Services			
Rental, Hiring and Real Estate Services, nfd	0.0	0.0	44.2
Rental and Hiring Services (except Real Estate)	0.7	0.7	0.4
Property Operators and Real Estate Services	1.3	0.5	0.5
<i>Total</i>	1.1	0.5	0.6
Professional, Scientific and Technical Services			

Industry of Employment	Tamborine - Canungrua	Boonah	Beaudesert
Professional, Scientific and Technical Services, nfd	0.0	0.0	0.0
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	0.9	0.4	0.4
Computer System Design and Related Services	0.7	0.2	0.0
<i>Total</i>	<i>0.8</i>	<i>0.3</i>	<i>0.3</i>
Administrative and Support Services			
Administrative and Support Services, nfd	0.0	0.0	0.0
Administrative Services	0.9	0.2	0.3
Building Cleaning, Pest Control and Other Support Services	1.8	0.5	0.7
<i>Total</i>	<i>1.2</i>	<i>0.3</i>	<i>0.4</i>
Public Administration and Safety			
Public Administration and Safety, nfd	0.0	0.0	0.0
Public Administration	0.1	0.5	1.5
Defence	14.1	0.0	0.0
Public Order, Safety and Regulatory Services	0.4	0.3	0.8
<i>Total</i>	<i>1.5</i>	<i>0.4</i>	<i>1.2</i>
Education and Training			
Education and Training, nfd	2.3	0.9	0.5
Preschool and School Education	1.4	1.4	1.6
Tertiary Education	0.2	0.1	0.1
Adult, Community and Other Education	1.6	1.6	1.4
<i>Total</i>	<i>1.1</i>	<i>1.1</i>	<i>1.2</i>
Health Care and Social Assistance			
Health Care and Social Assistance, nfd	0.4	0.9	1.3
Hospitals	0.0	0.5	0.4
Medical and Other Health Care Services	1.0	0.6	0.8
Residential Care Services	0.7	1.9	2.6
Social Assistance Services	0.8	0.7	1.6
<i>Total</i>	<i>0.5</i>	<i>0.8</i>	<i>1.1</i>
Arts and Recreation Services			
Arts and Recreation Services, nfd	0.0	0.0	0.0
Heritage Activities	3.7	3.7	1.0
Creative and Performing Arts Activities	3.2	0.8	0.5
Sports and Recreation Activities	1.5	0.5	1.6
Gambling Activities	0.0	0.0	0.0
<i>Total</i>	<i>1.7</i>	<i>0.7</i>	<i>1.1</i>
Other Services			
Other Services, nfd	0.0	0.0	0.0
Repair and Maintenance	0.9	1.3	1.1
Personal and Other Services	0.9	0.9	0.8
Private Households Employing Staff and Undifferentiated Goods and Service-Producing Activities of Households for Own Use	0.0	0.0	0.0
<i>Total</i>	<i>0.9</i>	<i>1.1</i>	<i>0.9</i>

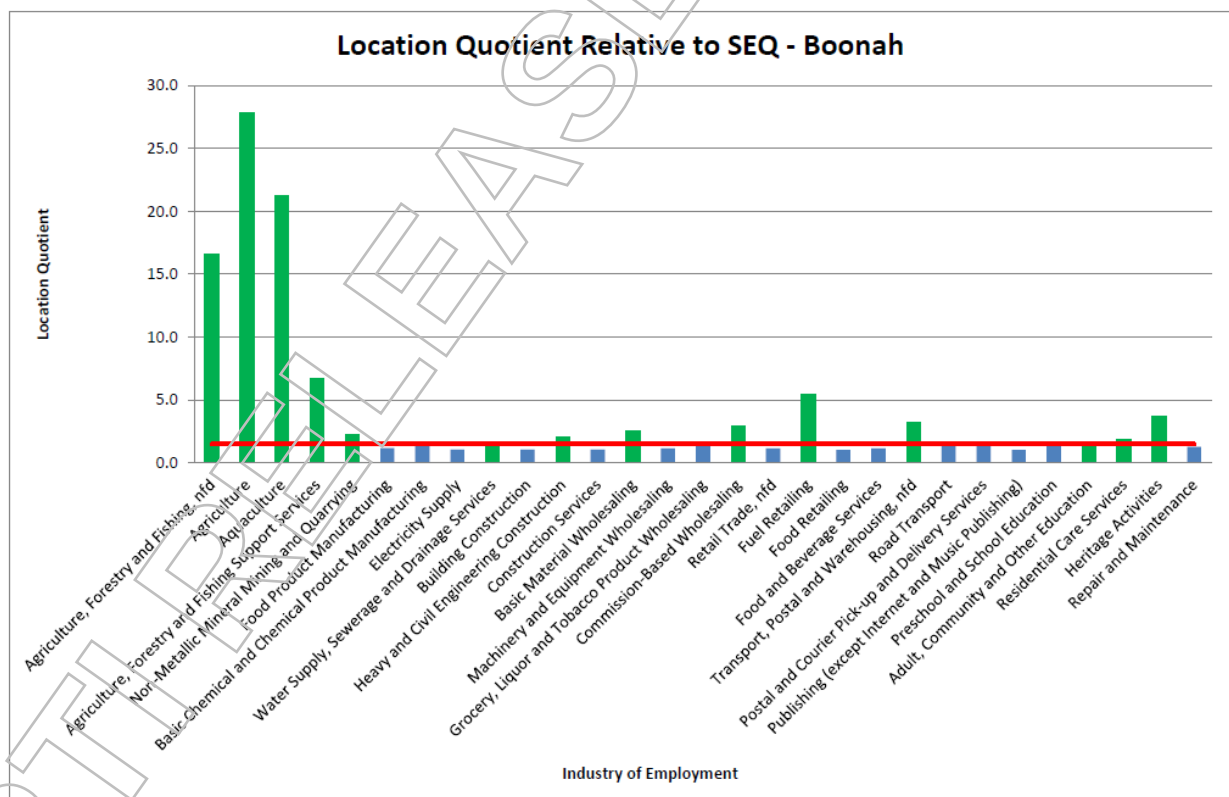
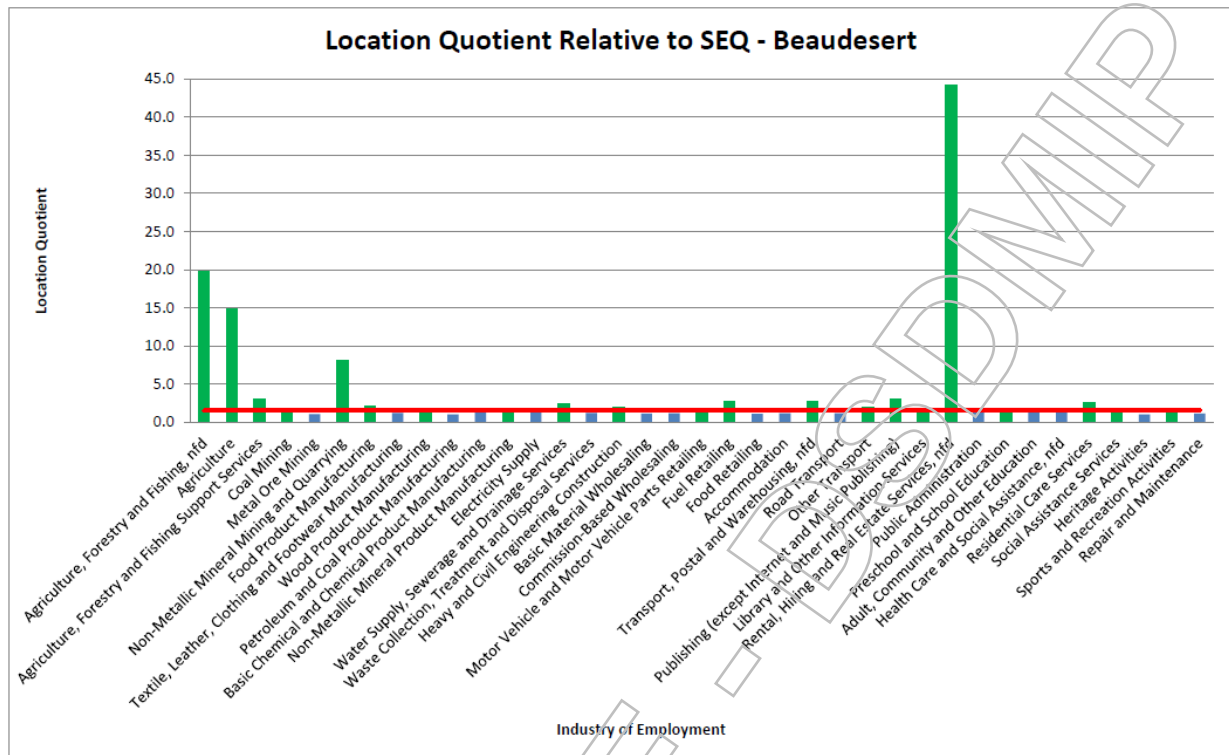
- Source: Australian Bureau of Statistics Census of Population and Housing, 2011
- Note: nfd refers to 'not further defined'

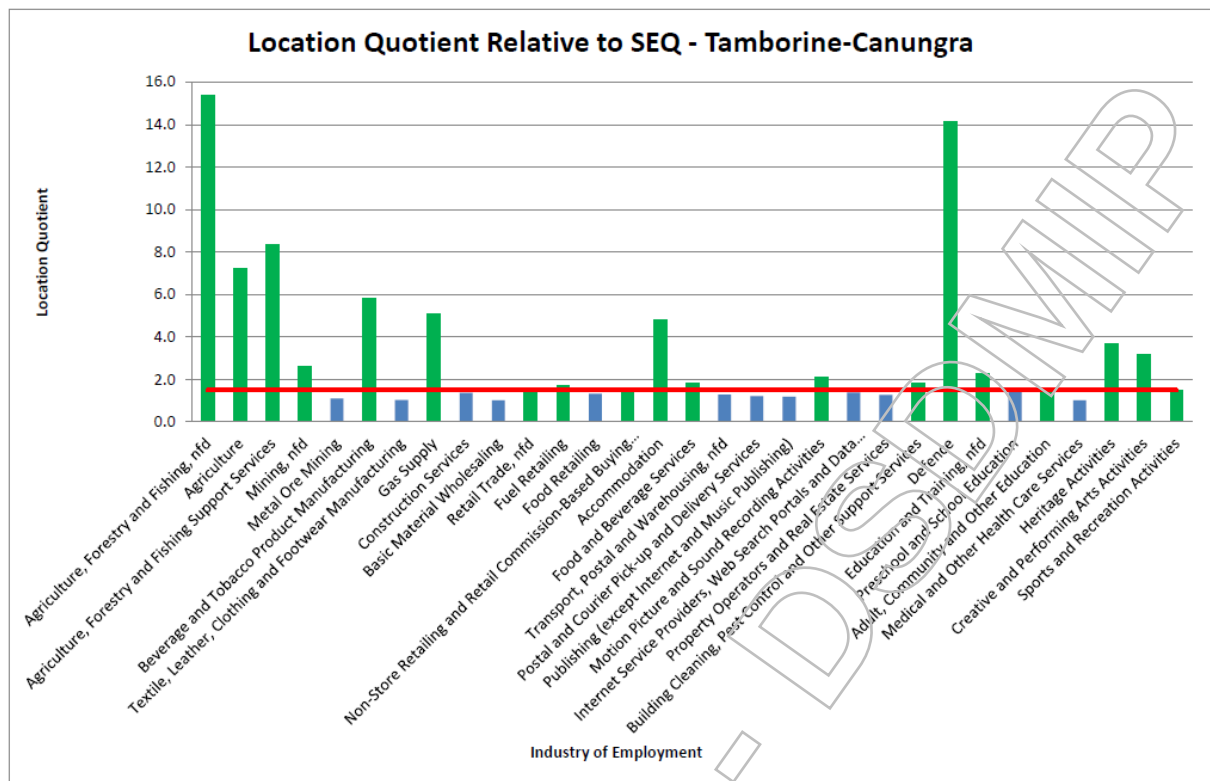
Table 3: Location Quotient Analysis, Beaudesert SA2 relative to South East Queensland, 2011

Industry of Employment	Location Quotient (>1)	Industry of Employment	Location Quotient (>1.5)
Agriculture, Forestry and Fishing, nfd	19.8	Agriculture, Forestry and Fishing, nfd	19.8
Agriculture	14.8	Agriculture	14.8
Agriculture, Forestry and Fishing Support Services	3.0	Agriculture, Forestry and Fishing Support Services	3.0
Coal Mining	1.8	Coal Mining	1.8
Metal Ore Mining	1.0	Non-Metallic Mineral Mining and Quarrying	8.1
Non-Metallic Mineral Mining and Quarrying	8.1	Food Product Manufacturing	2.1
Food Product Manufacturing	2.1	Wood Product Manufacturing	1.6
Textile, Leather, Clothing and Footwear Manufacturing	1.2	Non-Metallic Mineral Product Manufacturing	1.7
Wood Product Manufacturing	1.6	Water Supply, Sewerage and Drainage Services	2.5
Petroleum and Coal Product Manufacturing	1.0	Heavy and Civil Engineering Construction	1.9
Basic Chemical and Chemical Product Manufacturing	1.4	Motor Vehicle and Motor Vehicle Parts Retailing	1.6
Non-Metallic Mineral Product Manufacturing	1.7	Fuel Retailing	2.7
Electricity Supply	1.3	Transport, Postal and Warehousing, nfd	2.7
Water Supply, Sewerage and Drainage Services	2.5	Other Transport	2.0
Waste Collection, Treatment and Disposal Services	1.2	Publishing (except Internet and Music Publishing)	3.0
Heavy and Civil Engineering Construction	1.9	Library and Other Information Services	1.8
Basic Material Wholesaling	1.1	Rental, Hiring and Real Estate Services, nfd	44.2
Commission-Based Wholesaling	1.2	Preschool and School Education	1.6
Motor Vehicle and Motor Vehicle Parts Retailing	1.6	Residential Care Services	2.6
Fuel Retailing	2.7	Social Assistance Services	1.6
Food Retailing	1.1	Sports and Recreation Activities	1.6
Accommodation	1.2		
Transport, Postal and Warehousing, nfd	2.7		
Road Transport	1.2		
Other Transport	2.0		
Publishing (except Internet and Music Publishing)	3.0		
Library and Other Information Services	1.8		
Rental, Hiring and Real Estate Services, nfd	44.2		
Public Administration	1.5		
Preschool and School Education	1.6		
Adult, Community and Other Education	1.4		
Health Care and Social Assistance, nfd	1.3		
Residential Care Services	2.6		
Social Assistance Services	1.6		
Heritage Activities	1.0		
Sports and Recreation Activities	1.6		
Repair and Maintenance	1.1		

Source: Australian Bureau of Statistics Census of Population and Housing, 2011. Derived from Table 2
 Note: nfd refers to 'not further defined'

Figure2: Location Quotient Analysis Relative to SEQ by SA2, Scenic Rim, 2011





Source: Australian Bureau of Statistics Census of Population and Housing, 2011 Note: nfd refers to 'not further defined'

8. Requested Changes to ShapingSEQ in relation to the Bromelton SDA

8.1. Recognition of Bromelton SDA as an ARES

As outlined within the *ShapingSEQ* Prosper background paper, Areas of Regional Economic Significance (ARES) "emerge out of the confluence of a mix of different land uses, high levels of employment and specialisation in outwardly focused clusters. The identification of ARES recognises the interrelationship between centres, major industrial areas, and knowledge and technology precincts³".

The Beaudesert SA2 also includes the township of Beaudesert, which is identified as a Principal Rural Activity Centre under the *ShapingSEQ*. As a Principal Rural Activity Centre, Beaudesert is an important service and community hub for the sub-regional catchment. The proximity and connectivity of the Bromelton SDA and Beaudesert Principal Rural Activity Centre presents opportunities for synergies by providing access to necessary business and commercial services as well as worker amenities.

The establishment of the SCT Logistics intermodal facility within the Bromelton SDA is a major regional asset that will contribute to the underlying strength of the Bromelton corridor as an ARES. The Bromelton corridor as an ARES comprises a major enterprise and industrial area, Principal Rural Activity Centre and economic enabling infrastructure in the form of the Bromelton intermodal facility, heavy rail network and Mt Lindesay Highway.

The Bromelton SDA is located within the Beaudesert SA2, which covers an expansive geographic area of 1,628.5 square kilometres. In order to highlight the extent of the geographic size of the Beaudesert SA2, a review of the geographical area of those SA2s considered comparable to the development of the Bromelton SDA and are identified as ARES under the *ShapingSEQ* has been undertaken. For comparison purposes an examination of SA2s located within the Australia Trade Coast and South West Industrial Corridor have been utilised as a guide. Table 4 summarises those SA2s identified within the Australia Trade Coast and South West Industrial Corridor ARES by area and illustrated in Figure 3.

The South West Industrial Corridor comprises 20 small adjoining SA2s (generally less than 30 square kilometres in area) extending from Yeronga to Ripley and is generally characterised by industrial development. The combined geographic area of those SA2s identified within the South West Industrial Corridor is approximately 328.1 square kilometres (equivalent to 20% of the area of the Beaudesert SA2). The Australia Trade Coast SA2s geographically covers an area of 112.7 square kilometres (equivalent to 7% of the area of the Beaudesert SA2) and is characterised by industrial development concentrated around the Brisbane Airport and Port of Brisbane.

The recognition of the Bromelton SDA as an ARES is disadvantaged by its location within the Beaudesert SA2 (which covers an expansive geographic area) despite the footprint of the Bromelton SDA. The Bromelton SDA covers approximately 156 square kilometres, which is larger than the area of the Australia Trade Coast (112.7 square kilometres) and almost half the area of the South West Industrial Corridor (328.1 square kilometres). As illustrated, the Beaudesert SA2 covers a much broader geographical area than the identified ARES of the Australia Trade Coast and South West Industrial Corridor. With the Bromelton SDA covering a geographic area larger than the Australia Trade Coast, the SA2 geographies are not entirely useful in assessing Bromelton as an ARES.

Table 4: SA2 Geographic Area Comparison

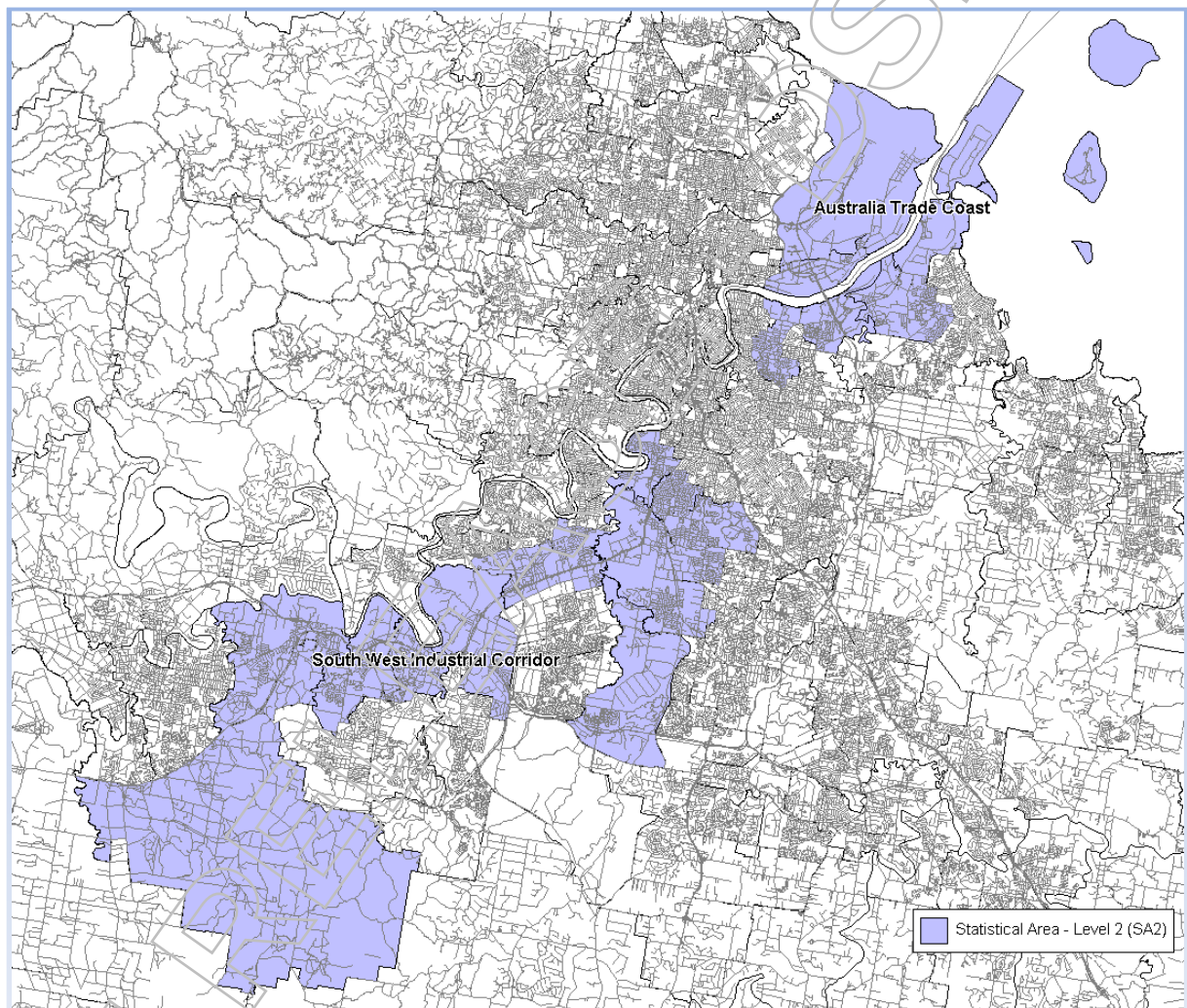
South West Industrial Corridor SA2s	Area (km2)	Australia Trade Coast SA2s	Area (km2)
Yeronga	6.1	Eagle Farm - Pinkenba	7.2
Moorebank	4.1	Brisbane Airport	45.7
Salisbury - Nathan	9.6	Brisbane Port - Lytton	32.8
Rocklea - Acacia Ridge	22.5	Wynnum West - Hemmant	12.2
Coopers Plains	4.4	Murarie	8.3
Darra - Sumner	8.0	Morningside - Seven Hills	6.5
Oxley (Qld)	6.9		
Wacol	18.5		
Inala - Richlands	10.9		

³ p.18 *ShapingSEQ* Draft South East Queensland Regional Plan Background Paper 2 Prosper, October 2016

South West Industrial Corridor SA2s	Area (km2)	Australia Trade Coast SA2s	Area (km2)
Pallara - Willawong	26.6		
Parkinson - Drewvale	12.7		
Seventeen Mile Rocks - Sinnamon Park	5.4		
Algester	3.7		
Carole Park	4.0		
Goodna	7.9		
Collingwood Park - Redbank	15.4		
Riverview	7.8		
New Chum	6.0		
Bundamba	17.2		
Ripley	130.4		
Total	328.1	Total	112.7
Beauresert	1,628.5		
• Bromelton SDA	156.0		

Source: Australian Bureau of Statistics

Figure 3: Australia Trade Coast and South West Industrial Corridor SA2s



Based on the preceding analysis, the Bromelton SDA should be identified as an ARES due to the following key factors:

- The Bromelton SDA has long been earmarked as having the potential to develop as a key industrial node in meeting a range of regional industry needs in the form of intermodal and/or rail freight facilities as well as 'difficult to locate' or large footprint industry uses;
- The Bromelton SDA is anticipated to achieve significant employment growth, with an estimated 24,800 workers at build out;

- Upon build out, Bromelton is anticipated to make a very significant contribution to GRP with an annual value added of \$1,975.2 million;
- A number of key infrastructure projects are currently under construction that are intended to support and enhance the development of the Bromelton SDA including the Beaudesert Town Bypass and Bromelton trunk water main;
- The recent development of the first stage of the SCT Logistics intermodal facility demonstrates Bromelton's development is underway, reinforcing the intent of the Bromelton SDA as a major industrial node not only for the Scenic Rim, but South East Queensland;
- Beaudesert is identified as a Principal Rural Activity Centre in proximity to the Bromelton SDA offering opportunities for synergies by providing access to business and commercial services as well as worker amenities to the Bromelton SDA.

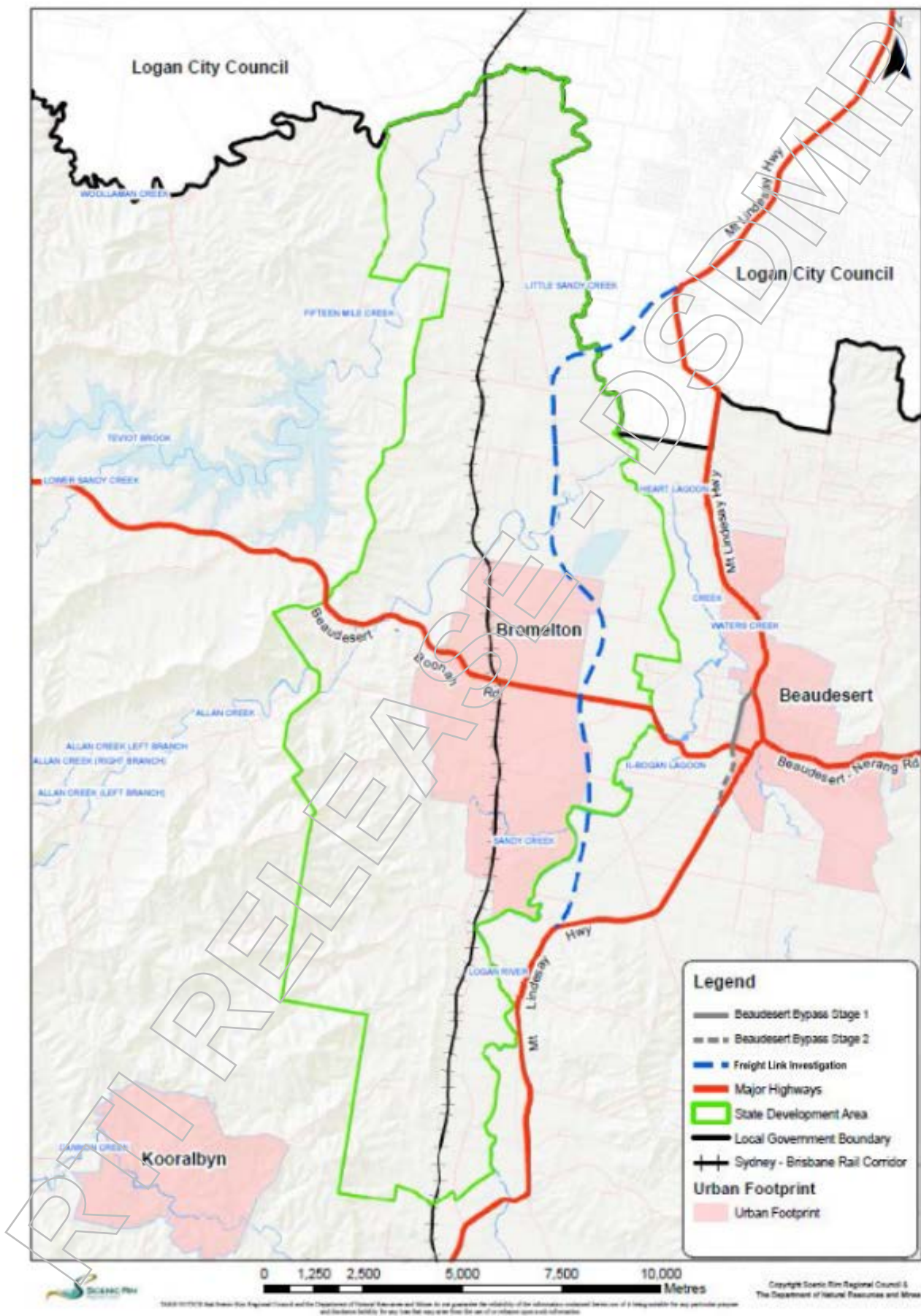
8.2. Inclusion of Realigned Mt Lindesay Highway as a Freight Link Investigation in Connect Theme

ShapingSEQ identifies the strategic road and freight system for SEQ between 2016 and 2041, which includes existing and future freight corridor (both road and rail) as well as two freight link investigation corridors, being Acacia Ridge to the Port of Brisbane and the Cunningham Highway to the Logan Motorway. Of particular relevance to Bromelton, *ShapingSEQ* identifies the existing rail freight corridor, future rail freight corridor (inland rail), existing Bromelton intermodal terminal and the existing road freight corridor. The development of the Bromelton SDA is a key node in meeting a range of regional industry needs including 'difficult to locate' and large footprint industry uses

The Mt Lindesay Highway and Beaudesert – Boonah Road provide the main connectivity to the Bromelton SDA. Upgrades to the Mt Lindesay Highway were completed as part of improvement works in 2016, which included the construction of a dedicated turning lane outside the Gleneagle State School to allow safer entry/exit for motorists and a dedicated right turning lane at the Veresdale Scrub intersection. Construction of a right turn lane has also been completed at the intersection of Camp Cable Road and the Mt Lindesay Highway, which also included the installation of traffic signals.

As the Bromelton SDA continues to develop as a significant industrial node it is anticipated increased pressure will be placed on transport connectivity for heavy vehicles. Bromelton is a key node in meeting a range of regional industry needs in the form of intermodal and/or rail freight facilities as well as 'difficult to locate' or large footprint industry uses. It is considered that the Bromelton should be identified as an ARES. Appropriate planning is therefore essential to ensure that the necessary infrastructure is developed and maintained to support growth within this corridor.

Figure 4: Proposed Freight Link Investigation for Inclusion with Connect Map 3b - Strategic road and freight system 2016 - 2041



RTI RELEASE - DSDMIP



EMPLOYMENT IMPLICATIONS OF THE DEVELOPMENT OF BROMELTON

REPORT

AUGUST 2016





EMPLOYMENT IMPLICATIONS OF THE DEVELOPMENT OF BROMELTON

Report

PREPARED FOR:
Scenic Rim Regional Council
82 Brisbane Street
Beaudesert QLD 4285

PREPARED BY:
Economic Associates Pty Ltd
ACN 085 445 610
PO Box 541 Spring Hill QLD 4004
Telephone: (07) 3839 1011
Facsimile: (07) 3839 1022

August 2016 - 16024 Report Rev B

© Economic Associates Pty Ltd

TABLE OF CONTENTS

EXECUTIVE SUMMARY	7
1. INTRODUCTION	10
1.1 BACKGROUND AND CONTEXT	10
1.2 PURPOSE	10
2. ANTICIPATED EMPLOYMENT AT BROMELTON	11
2.1 NATURE OF INDUSTRIAL DEVELOPMENT	11
2.2 BROMELTON DEVELOPMENT SCENARIOS	12
2.2.1 MAIN DEVELOPMENT SCENARIO	12
2.2.2 ACCELERATED DEVELOPMENT SCENARIO	14
2.2.3 EXTENDED DEVELOPMENT SCENARIO	15
2.3 IMPLICATIONS FOR THE BROMELTON SDA AND THE SCENIC RIM	16
3. AVAILABLE LOCAL WORKFORCE	17
3.1 LOCAL WORKFORCE PROFILE	17
3.1.1 IMPLICATIONS FOR THE BROMELTON SDA AND THE SCENIC RIM	21
3.2 AVAILABLE LOCAL WORKFORCE POPULATION	21
3.2.1 IMPLICATIONS FOR THE SCENIC RIM, BEAUDESERT AND BROMELTON SDA	32
4. ALTERNATIVE SOURCE OF AVAILABLE WORKFORCE	38
4.1 GREATER FLAGSTONE / YARRABILBA	38
4.2 COMPARATIVE DEMOGRAPHIC ANALYSIS	44
4.3 IMPLICATIONS FOR THE BROMELTON SDA AND THE SCENIC RIM	48
5. CONNECTIVITY WITH BROMELTON	52
6. OVERALL IMPLICATIONS FOR THE SCENIC RIM	55
APPENDIX A	58
BROMELTON EMPLOYMENT SCENARIOS	58
APPENDIX B	62
POPULATION AND DEMOGRAPHIC PROFILE	62



LIST OF TABLES & FIGURES

FIGURE 2.1: CUMULATIVE EMPLOYMENT BY LAND USE TYPE, BROMELTON SDA, MAIN DEVELOPMENT SCENARIO.....	5
FIGURE 2.2: CUMULATIVE EMPLOYMENT, BROMELTON SDA, ACCELERATED DEVELOPMENT SCENARIO.....	6
FIGURE 2.3: CUMULATIVE EMPLOYMENT, BROMELTON SDA, EXTENDED DEVELOPMENT SCENARIO.....	7
FIGURE 2.4: CUMULATIVE TOTAL EMPLOYMENT BY DEVELOPMENT SCENARIO, BROMELTON SDA.....	8
FIGURE 2.5: INCREMENTAL GROWTH IN EMPLOYMENT BY DEVELOPMENT SCENARIO, BROMELTON SDA, 2021 TO 2036.....	9
FIGURE 3.1: AGE PROFILE BY AGE COHORT, SCENIC RIM, 2001 TO 2011.....	11
FIGURE 3.2: AGE PROFILE BY AGE COHORT, BEAUDESERT, 2001 TO 2011.....	12
FIGURE 3.3: AGE PROFILE BY AGE COHORT, BOONAH, 2001 TO 2011.....	13
FIGURE 3.4: WORKING AGE POPULATION V RETIREE POPULATION, SCENIC RIM, 2001 TO 2036.....	14
FIGURE 3.5: WORKING AGE POPULATION V RETIREE POPULATION, AVERAGE GROWTH PER ANNUM, SCENIC RIM, 2001 TO 2036.....	15
FIGURE 3.6: TOTAL AVAILABLE WORKFORCE V PERSONS EMPLOYED IN NON-POPULATION SERVING SECTORS V PERSONS EMPLOYED IN INDUSTRIAL SECTORS, SCENIC RIM, 2016 TO 2036.....	16
FIGURE 3.7: INCREMENTAL GROWTH IN EMPLOYED PERSONS, SCENIC RIM, 2021 TO 2036.....	16
FIGURE 3.8: WORKING AGE POPULATION V RETIREE POPULATION, BEAUDESERT, 2001 TO 2036.....	17
FIGURE 3.9: WORKING AGE POPULATION V RETIREE POPULATION, AVERAGE GROWTH PER ANNUM, BEAUDESERT, 2001 TO 2036.....	18
FIGURE 3.10: TOTAL AVAILABLE WORKFORCE V PERSONS EMPLOYED IN NON-POPULATION SERVING SECTORS V PERSONS EMPLOYED IN INDUSTRIAL SECTORS, BEAUDESERT, 2016 TO 2036.....	19
FIGURE 3.11: INCREMENTAL GROWTH IN EMPLOYED PERSONS, BEAUDESERT, 2021 TO 2036.....	19
FIGURE 3.12: WORKING AGE POPULATION V RETIREE POPULATION, BOONAH, 2001 TO 2011.....	20
FIGURE 3.13: WORKING AGE POPULATION V RETIREE POPULATION, AVERAGE GROWTH PER ANNUM, BOONAH, 2001 TO 2036.....	21
FIGURE 3.14: TOTAL AVAILABLE WORKFORCE V PERSONS EMPLOYED IN NON-POPULATION SERVING SECTORS V PERSONS EMPLOYED IN INDUSTRIAL SECTORS, BOONAH, 2016 TO 2036.....	22
FIGURE 3.15: INCREMENTAL GROWTH IN EMPLOYED PERSONS, BOONAH, 2021 TO 2036.....	22
FIGURE 3.16: INCREMENTAL GROWTH IN NUMBER OF WORKERS, AVAILABLE WORKFORCE V BROMELTON SDA DEVELOPMENT SCENARIO, SCENIC RIM, 2021 TO 2036.....	23
TABLE 3.1: ESTIMATED EMPLOYMENT SHORTFALL/SURPLUS, AVAILABLE WORKFORCE V BROMELTON SDA DEVELOPMENT SCENARIO, SCENIC RIM, 2021 TO 2036.....	24
FIGURE 3.17: ESTIMATED SHORTFALL IN EMPLOYMENT BY BROMELTON SDA DEVELOPMENT SCENARIO.....	25
FIGURE 3.18: INCREMENTAL GROWTH IN NUMBER OF WORKERS, AVAILABLE WORKFORCE V BROMELTON SDA DEVELOPMENT SCENARIO, BEAUDESERT.....	26
FIGURE 4.1: DEFINED GREATER FLAGSTONE/YARRABILBA COMMUNITY.....	29
TABLE 4.1: POPULATION ESTIMATES, GREATER FLAGSTONE/YARRABILBA, 2006 TO 2036.....	30
FIGURE 4.2: WORKING AGE POPULATION V RETIREE POPULATION, GREATER FLAGSTONE/YARRABILBA, 2001 TO 2036.....	30
FIGURE 4.3: WORKING AGE POPULATION V RETIREE POPULATION, AVERAGE GROWTH PER ANNUM, GREATER FLAGSTONE/YARRABILBA 2001 TO 2036.....	31
FIGURE 4.4: AGE PROFILE BY AGE COHORT GREATER FLAGSTONE/YARRABILBA, 2001 TO 2011.....	31
FIGURE 4.5: DEFINED GREATER SPRINGFIELD.....	33
FIGURE 4.6: DEFINED NORTHERN GOLD COAST.....	35
FIGURE 4.7: DEFINED NORTH LAKES.....	36
TABLE 4.2: WORKING AGE POPULATION COMPARISON, 2016 AND 2036.....	37
FIGURE 4.8: WORKING AGE POPULATION COMPARISON, 2001 TO 2036.....	37
FIGURE 4.9: WORKING AGE POPULATION COMPARISON, AVERAGE GROWTH PER ANNUM.....	38
FIGURE 4.10: INDUSTRY OF EMPLOYMENT COMPARISON, GREATER FLAGSTONE/YARRABILBA, BEAUDESERT AND BOONAH, 2001 TO 2011.....	39
FIGURE 5.1: KEY ROADS PROVIDING CONNECTIVITY TO/FROM BEAUDESERT/BROMELTON.....	41
TABLE 5.1: TRAFFIC CENSUS DATA, ROADS PROVIDING CONNECTIVITY TO BEAUDESERT/BROMELTON, 2011 TO 2015.....	42
TABLE A. 1: CUMULATIVE EMPLOYMENT PROFILE FOR BROMELTON BY LAND USE TYPE, MAIN SCENARIO.....	47
TABLE A. 2: CUMULATIVE EMPLOYMENT PROFILE FOR BROMELTON BY LAND USE TYPE, ACCELERATED SCENARIO.....	48
TABLE A. 3: CUMULATIVE EMPLOYMENT PROFILE FOR BROMELTON BY LAND USE TYPE, EXTENDED SCENARIO.....	49
TABLE B. 1: DEMOGRAPHIC PROFILE COMPARISON, SCENIC RIM, BEAUDESERT, BOONAH AND GREATER FLAGSTONE/YARRABILBA 2001 TO 2011.....	51
TABLE B. 2: DEMOGRAPHIC PROFILE COMPARISON, GREATER SPRINGFIELD, NORTHERN GOLD COAST, NORTH LAKES, SEQ AND QUEENSLAND, 2001 TO 2011.....	53
TABLE B. 3: POPULATION PROJECTIONS, SCENIC RIM, BEAUDESERT AND BOONAH 2006 TO 2036.....	55

EXECUTIVE SUMMARY

Economic Associates was commissioned by Scenic Rim Regional Council to undertake an analysis of the employment implications resulting from the development of Bromelton. As a key industrial node for the Scenic Rim and SEQ more broadly, Bromelton is anticipated to generate significant employment and will require access to a skilled workforce. Hence, it is pertinent to investigate whether or not the Scenic Rim (in its current and future capacity) provides a sufficient pool of workers to appropriately support the development of Bromelton or whether alternative sources of available workforce (beyond the Scenic Rim) may be required to supplement any potential employment shortfalls (skills and/or number of workers) and the implications of that.

Located west of the town of Beaudesert, Bromelton has long been identified as having the potential to develop as a significant industrial node particularly in meeting a range of regional industry needs in the form of intermodal and/or rail freight facilities and 'difficult to locate' or large footprint industry. As a long term development, appropriate planning is required to ensure the necessary infrastructure is developed and maintained to support Bromelton as a key industrial node not only for the Scenic Rim but the broader South East Queensland. This not only includes the necessary transport and service infrastructure to support businesses within Bromelton but also ensuring the appropriate infrastructure (such as transport, recreational, community, educational and health infrastructure) is in place to support the broader community as Bromelton evolves.

Existing industrial uses within the Bromelton SDA include the Gelita gelatine factory, AJ Bush and Son's rendering plant, quarries and Council's waste facility. Bromelton also hosts a number of poultry farms. Construction is also underway of the SCT Logistics 130 hectare freight terminal to be developed in several stages and located on the dual gauge rail line between Brisbane and Sydney. The SCT Logistics facility is expected to create 1,000 direct jobs on site once fully completed¹.

¹ http://www.scenicrim.qld.gov.au/news/-/asset_publisher/X8lIBylPtOtj/blog/7-december-30-million-freight-terminal-for-bromelton

Bromelton is expected to yield 943 hectares of industrial land allotments. Industrial development at Bromelton is anticipated to include a range of industrial land uses including:

- Major industry: medium to high impact industry, generally occupying sites in excess of one hectare (potential allotment yield of 617 hectares);
- Rail dependent industry: large footprint industry that requires direct access to rail facilities (potential allotment yield of 244 hectares);
- Rail sidings: rail loops and spur lines to facilitate the (un)loading of rail based freight (potential allotment yield of 58 hectares);
- Corporate logistics: typically national based transport and logistics centres (potential allotment yield of 18 hectares);
- Local service centre: a retail and business hub that provides retail and commercial services to workers and businesses (potential allotment yield of 6 hectares).

At build out, Bromelton is anticipated to yield 24,802 workers consisting of:

- 617 hectares of major industry, employing 18,510 workers;
- 244 hectares of rail dependent industry, employing 4,870 workers;
- 58 hectares of rail sidings, employing 290 workers;
- 6 hectares of local services centres, employing 580 workers; and
- 18 hectares of corporate logistics, employing 552 workers.

With Bromelton yielding a workforce of 24,802 workers, access to a suitable workforce with the necessary skills will be required to support the employment requirements of Bromelton as well as businesses within the broader Scenic Rim Region, particularly Beaudesert. Based on various development scenarios, the employment workforce is expected to peak in 2064 under the main scenario, in 2054 under the accelerated scenario (assumes development take-up is reduced by 10 years) and in 2074 under the extended scenario (assumes development take-up



extends by 10 years). With the construction of the SCT Logistics underway, development take up of the Bromelton SDA at this stage aligns with the accelerated development scenario.

Historically, the Scenic Rim has had a significant affiliation with the agricultural sector borne by the region's strong links to horticulture and farming. The development of Bromelton will assist in shaping the region's local economy over the longer term. The Scenic Rim is generally characterised by an older demographic, reflective of the Region's appeal to retirees and the region's relationship with the agricultural sector. As the local community continues to age the growth in the local skilled workforce is likely to diminish placing increasing pressure to seek alternative sources of available workforce that not only support local businesses but also have the necessary skills base. The long term development of Bromelton as a significant industrial node will contribute to the need for Scenic Rim businesses to have access to a skilled workforce to supplement any shortfalls in the availability of the local workforce

and/or skills, particularly skilled blue collar workers.

The total available workforce in the Scenic Rim is estimated to be 13,674 in 2016 increasing to 18,931 persons. Based on persons employed in non-population serving sectors, the workforce population is estimated to be 11,188 persons in 2016 increasing to 15,489 persons by 2036.

Comparison of the incremental growth in the Scenic Rim of those employed in non-population serving sectors as well as available local workforce with the employment yield for Bromelton between 2021 and 2036 highlights a potential shortfall in workers to support development of the Bromelton SDA by 2036 under the main and accelerated development scenarios. Alternatively, if development of the Bromelton SDA aligns with the accelerated development scenario, there will be a shortfall in available local workforce by 2021. Consequently, alternative sources of available workforce would be required to support the ongoing development of the Bromelton SDA as

well as local businesses within the Scenic Rim.

The most proximate alternative source of available workforce to service the development of the Bromelton SDA (and the broader Scenic Rim) is south west Logan, in particular the Greenfield corridors of Greater Flagstone and Yarrabilba. The connectivity of the Greater Flagstone and Yarrabilba communities to Bromelton and the Scenic Rim makes those future communities a logical source of available workforce to supplement potential shortfalls in the availability and/or skills of the local workforce. Both Greater Flagstone and Yarrabilba represent long term developments that are anticipated to accommodate significant populations and subsequently a large pool of workers. It is envisaged that the Greater Flagstone and Yarrabilba communities will attract a similar demographic to other greenfield corridors within the South East Queensland located in proximity to other major employment nodes such as North Lakes, Greater Springfield and the northern Gold Coast. These communities have generally been attractive for first home buyers and have typically attracted a young skilled blue collar workforce.

As Bromelton develops, it is apparent that there is a shortfall in the location workforce population to not only support the employment requirements of Bromelton but also the local businesses of Beaudesert. With Greater Flagstone/Yarrabilba representing the most logical and proximate alternative workforce source to supplement the anticipated shortfall in the supply of available local workforce, it is pertinent to ensure sufficient connectivity to Bromelton is developed and maintained.

The Mount Lindesay Highway and Beaudesert-Boonah Road provide the main connectivity between the Bromelton SDA and Greater Flagstone/Yarrabilba region. Other key connector roads linking the Greater Flagstone/Yarrabilba region to the Bromelton SDA (via the Mount Lindesay Highway and Beaudesert-Boonah Road) include:

- Camp Cable Road (main road connecting Yarrabilba to the Mount Lindesay Highway);
- Waterford-Tamborine Road,
- Beaudesert-Beenleigh Road; and

- Beaudesert-Nerang Road.

Internal road connections between Greater Flagstone and Bromelton SDA are provided via Bromelton House Road, Allan Creek Road, Brookland Road and Undullah Road (which provides connectivity with the Mount Lindesay Highway). These roads are generally characterised by a six metre wide, single carriage way with a single lane seal with speed limits generally varying between 60 kph and 80 kph. The Ferguson Reserve Bridge along Brookland Road is a narrow bridge that functions as a slow point (due to its narrowness) as part of the internal road connection within the Bromelton SDA. The JS Cochrane Bridge is also a narrow bridge (barely two lanes) located along Undullah Road (west of Brookland Road) that poses difficult for passing vehicles at speed. As an alternative route between Greater Flagstone and the Bromelton SDA, these internal road connections would need to upgrading and appropriate management to support the development of the Bromelton SDA.

The ongoing development of the Bromelton SDA is likely to result in a number of flow-on effects to the local community. As the largest and most proximate centre to the Bromelton SDA, Beaudesert is likely to experience the most notable flow-on effects resulting from the development of the Bromelton SDA. Anticipated implications for Beaudesert over the medium to long term include:

- Changes in the structure of the demographic profile particularly in regards to age, with younger families likely to be attracted to Beaudesert for employment opportunities within the Bromelton SDA;
- Compositional changes of the local workforce in terms of skills and industry profile (particularly within the transport, postal and warehousing industry sectors), with the local workforce attaining the necessary skills and training required by businesses within the Bromelton SDA;
- Increase in household income levels as a result of the attraction of Bromelton SDA as a major employment node particularly for skilled blue collar workers; and
- Increases in the working age population

compared to the retiree population as younger workers seek employment opportunities derived from the Bromelton SDA.

The structural and compositional changes of the employment and demographic profile of Beaudesert would also result in additional flow-on effects with respect to the provision of local services and infrastructure provided such as:

- Sufficient provision of retail and commercial services and facilities to cater for the needs of the local resident population as well as the workforce population. Demand for retail provision would result from the anticipated increase in household incomes and subsequent discretionary income;
- Provision of recreational (e.g. parks), community (e.g. libraries), educational (e.g. schools) and health (e.g. hospitals) infrastructure to support the local resident and workforce population; and
- Provision and maintenance of transport infrastructure (e.g. local roads, bridges, public transport etc.) to support the anticipated increases in traffic and workers within Beaudesert and surrounds.



1. INTRODUCTION

1.1 BACKGROUND AND CONTEXT

Bromelton is located approximately six kilometres west of the town of Beaudesert. In the late 1990s, Bromelton was identified as having the potential to meet a range of regional industry needs in the form of intermodal and/or rail freight facilities and 'difficult to locate' or large footprint industry. A number of high impact industry activities relocated from Brisbane to Bromelton, including AJ Bush & Sons (rendering facility) and Gelita (manufacturers of gelatine) in the 1990s and remain operational. Other uses within the Bromelton SDA include quarries, Council's waste facility as well as a number of poultry farms.

The first statutory regional plan for South East Queensland (SEQ RP 2005-2026) confirmed Bromelton's intended role and function as a regionally significant future industry location, and included Bromelton in the SEQ urban footprint. This was reinforced through the Beaudesert Shire whole of shire planning project undertaken in 2006 by the former Beaudesert Shire Council.

In 2008, the Queensland Government declared the Bromelton State Development Area, which covers approximately 15,000 hectares, including the land designated as urban footprint at Bromelton under the SEQ RP 2005-2026.

There has been considerable developer interest at Bromelton with large englobo development parcels being acquired by a number of major industrial land developers and logistics operators, including Mirvac, Eureka and SCT Logistics. Construction is also underway of the SCT Logistics 130 hectare freight terminal to be developed in several stages and located on the dual gauge rail line between Brisbane and Sydney. The SCT Logistics facility is expected to create 1,000 direct jobs on site once fully completed².

² http://www.scenicrim.qld.gov.au/news/-/asset_publisher/X8lIBylPtOtj/blog/7-december-30-million-freight-terminal-for-bromelton

1.2 PURPOSE

Scenic Rim Regional Council is seeking to obtain an understanding of the potential implications on the Scenic Rim (in particular Beaudesert) derived from the long term development of Bromelton. Intended as a significant industrial node for the Scenic Rim and the broader South East Queensland, Bromelton is anticipated to generate a significant workforce population. The development of Bromelton is expected to have a number of flow-on implications for the Scenic Rim, which need to be appropriately planned for and managed. Such implications include:

- Scenic Rim's capacity to provide a sufficient workforce source to support the continued development of Bromelton in the long term;
- In the event additional workers are required to support the development of Bromelton, where are the alternative sources of available workforce likely to come from;
- What are the demographic characteristics of the alternative sources of available workforce likely to be, or put another way, would these alternative locations be likely to have populations with the skills base required by Bromelton businesses;
- What are the likely corridors that would be used by Bromelton workers originating from outside the Scenic Rim, and in a strategic sense what is the status of those corridors; and
- What are the potential implications of the development of Bromelton on Beaudesert in the long term, or how will the Beaudesert community need to change to better support Bromelton.

Economic Associates was commissioned by Scenic Rim Regional Council to undertake an analysis of the employment implications resulting from the development of Bromelton. As a key industrial node for the Scenic Rim, Bromelton is anticipated to generate significant employment and will require access to a skilled labour workforce. Hence, it is pertinent to investigate whether or not the Scenic Rim (in its current and future capacity) provides a sufficient pool of workers to appropriately support the development of Bromelton or whether alternative sources of available workforce (beyond the Scenic Rim) may be required to supplement any potential employment shortfalls in skills and/or number of workers).

2. ANTICIPATED EMPLOYMENT AT BROMELTON

2.1 NATURE OF INDUSTRIAL DEVELOPMENT

Industrial development at Bromelton is anticipated to ultimately comprise 1,114 hectares. Previous work undertaken by Queensland Urban Utilities and Economic Associates anticipated that this 1,114 hectares of industrial development would comprise:

- Major industry: medium to high impact industry, generally occupying sites in excess of one hectare (potential allotment yield of 617 hectares);
- Rail dependent industry: large footprint industry that requires direct access to rail facilities (potential allotment yield of 244 hectares);

- Rail sidings: rail loops and spur lines to facilitate the (un)loading of rail based freight (potential allotment yield of 58 hectares);
- Corporate logistics: typically national based transport and logistics centres (potential allotment yield of 18 hectares); and
- Local service centre: a retail and business hub that provides retail and commercial services to workers and businesses (potential allotment yield of 6 hectares).

Existing industrial uses within the Bromelton SDA include the Gelita gelatine factory and AJ Bush and Son's rendering plant. Bromelton also has extractive industries, Council's waste management facility and a number of poultry farms. Construction is now underway of the SCT Logistics 130 hectare freight terminal to be developed in several stages and located on the dual gauge rail line between Brisbane and Sydney. The SCT Logistics facility is expected to create 1,000 direct jobs on site once fully completed³.

³ http://www.scenicrim.qld.gov.au/news/-/asset_publisher/x8lBylPtOtj/blog/7-december-30-million-freight-terminal-for-bromelton



2.2 BROMELTON DEVELOPMENT SCENARIOS

For the purposes of this analysis, three development scenarios have been generated to assess the implications of alternative take-up scenarios of the Bromelton SDA based on the uses identified in section 2.1. The development scenarios assessed include the following:

- **Main Development Scenario:** is the base case scenario that assumes development take-up occurs in line with the anticipated take-up derived by Queensland Urban Utilities for the development of a water main to Bromelton;
- **Extended (or Protracted) Development Scenario:** assumes development take-up occurs at a slower rate than anticipated by the main development scenario (e.g. development take-up extends by 10 years than anticipated under the main scenario); and
- **Accelerated Development Scenario:** assumes development take-up occurs at a faster rate than anticipated by the main development scenario (e.g. development take-up reduces by 10 years than anticipated under the main scenario).

With construction of the SCT Logistics freight terminal now underway, development of Bromelton is likely to be somewhere between the main and accelerated development scenarios at least in the short term.

2.2.1 MAIN DEVELOPMENT SCENARIO

Queensland Utilities estimates that 1,114 hectares of industrial land would yield 943 hectares of industrial allotments. Under the main development scenario, the first land at Bromelton is assumed will be taken up in 2023, with the full 943 hectares of industrial allotments expected to be taken up over the next 40–45 years.

The take-up of industrial land by land use type has been utilised as a basis to estimated indicative employment levels at Bromelton. As already mentioned, the five main land use types anticipated within Bromelton including Major Industry; Rail Dependent Industry; Rail Sidings; Local Services Centres and Corporate Logistics. Employment density ratios have been utilised

to derive the total employment generated by the development of the Bromelton SDA.

Over the past ten years, Economic Associates has interviewed in excess of 400 industrial businesses for various industrial land studies for the Queensland Government and a number of major local governments. This database of information includes information pertaining to employment densities, which has informed the employment density assumptions used in this report.

Employment density ratios adopted in this report are as follows:

- **Major Industry:** 30 workers per hectare;
- **Rail Dependent Precinct:** 20 workers per hectare;
- **Rail Sidings:** 5 workers per hectare;
- **Local Services Centre:** 100 workers per hectare; and
- **Corporate Logistics:** 30 workers per hectare.

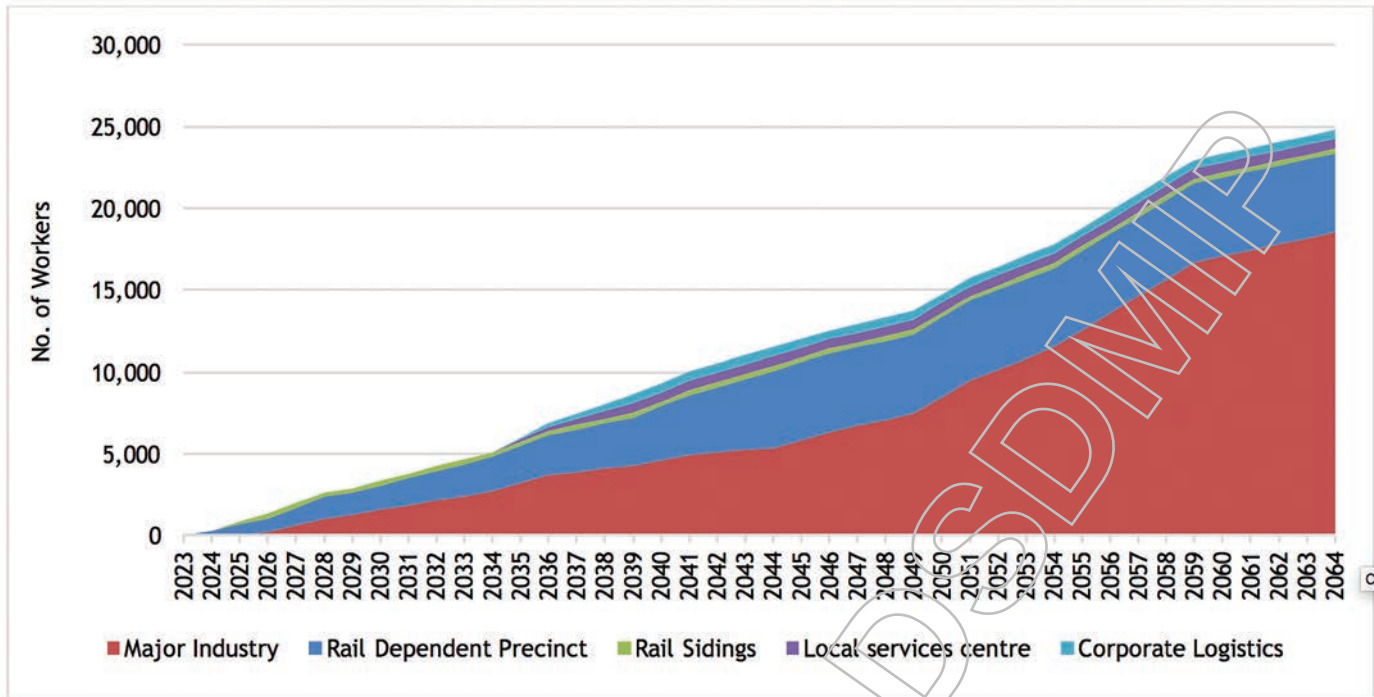
Based on the above employment densities a cumulative employment profile for Bromelton by land use type has been generated in Table A.1 in Appendix A.

By 2026, employment at Bromelton is anticipated to comprise 1,324 workers, increasing to 3,790 workers by 2031 and 6,871 workers by 2036 (under the main development scenario). Employment within Bromelton is anticipated to peak at 24,802 workers by 2064, comprising:

- 18,510 workers within the Major Industry precinct;
- 4,870 workers within the Rail Dependent Industry precinct;
- 290 workers within the Rail Sidings precinct;
- 580 workers within the Local Services Centre; and
- 552 workers within the Corporate Logistics precinct.

The ongoing development of Bromelton is anticipated to generate significant employment requiring access to a suitable pool of available workforce with the appropriate skills to support the Bromelton SDA. Figure 2.1 illustrates the cumulative employment resulting from the development of the Bromelton SDA under the main development scenario.

Figure 2.1: Cumulative Employment by Land Use Type, Bromelton SDA, Main Development Scenario



Source: Queensland Urban Utilities, Economic Associates Analysis



2.2.2 ACCELERATED DEVELOPMENT SCENARIO

Development of Bromelton under the accelerated development scenario assumes employment generated by Bromelton occurs at a faster rate (i.e. total employment peaks at 24,802 workers ten years earlier than anticipated under the main scenario in 2054). Under the accelerated development scenario, the following has been assumed:

- Major Industry: employment commences in 2016, ten years earlier than anticipated under the main scenario;
- Rail Dependent Precinct: employment commences in 2019, five years earlier than anticipated under the main scenario;
- Rail Sidings: employment commences in 2022, a year earlier than anticipated under the main scenario;
- Local Services Centre: employment commences in 2034, a year earlier than anticipated under the main scenario; and
- Corporate Logistics Precinct: employment commences in 2034, a year earlier than anticipated under the main scenario.

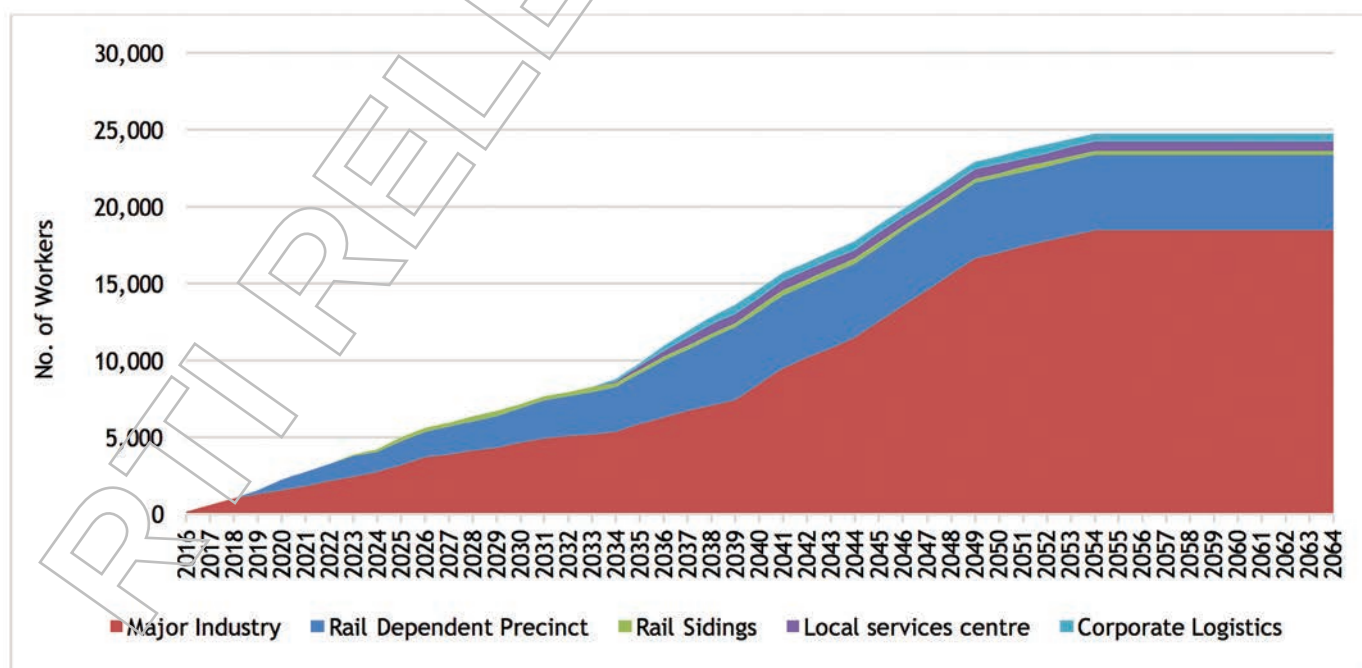
Based on the above assumptions, the employ-

ment generated by the development of Bromelton occurs at a faster rate than anticipated under the main scenario with total employment peaking at 24,802 workers in 2054. Under the accelerated scenario, in 2026 total employment generated by Bromelton is estimated at 5,644 workers, increasing to 7,674 workers in 2031. By 2036, the total employment generated by Bromelton under the accelerated development scenario is anticipated to be 10,954 workers comprising:

- 6,329 workers within the Major Industry precinct;
- 3,652 workers within the Rail Dependant Industry precinct;
- 290 workers within the Rail Sidings precinct;
- 350 workers within the Local Services Centre; and
- 333 workers within the Corporate Logistics Precinct.

Table A.2 (in Appendix A) summarises the cumulative employment profile for the development of the Bromelton SDA by land use type under the accelerated development scenario. Figure 2.2 below illustrates the cumulative employment of the Bromelton SDA under the accelerated development scenario.

Figure 2.2: Cumulative Employment, Bromelton SDA, Accelerated Development Scenario



Source: Economic Associates Analysis

2.2.3 EXTENDED DEVELOPMENT SCENARIO

The extended development scenario assumes employment generated by the development of Bromelton occurs at a slower rate (i.e. total employment peaks at 24,802 workers ten years later than anticipated under the main scenario in 2074). Under the extended development scenario, the following has been assumed:

- Major Industry: employment commences in 2036, ten years later than anticipated under the main scenario;
- Rail Dependent Precinct: employment commences a year later in 2025, a year later than anticipated under the main scenario;
- Rail Sidings: employment commences in 2026, three years later than anticipated under the main scenario;
- Local Services Centre: employment commences in 2038, three years later than anticipated under the main scenario; and
- Corporate Logistics: employment commences in 2038, three years later than anticipated.

ed under the main scenario.

Based on the above assumptions, the employment generated by Bromelton occurs at a slower rate with the total employment generated by Bromelton peaking at 24,802 workers in 2074. Under the extended development scenario, in 2026 total employment generated by Bromelton is estimated at 706 workers, increasing to 1,793 workers by 2031. By 2036, the total employment generated by the Bromelton SDA is anticipated to be 2,729 workers under the extended development scenario comprising:

- 170 workers within the Major Industry precinct;
- 2,268 workers within the Rail Dependent Industry precinct, and
- 290 workers within the Rail Sidings precinct.

No workers are anticipated within the local services centre of corporate logistics precincts in 2036, with the first workers in these precincts anticipated in 2038 under the extended development scenario as detailed in Table A.3 in Appendix B. Figure 2.3 below illustrates the cumulative employment of the Bromelton SDA under

the extended development scenario.

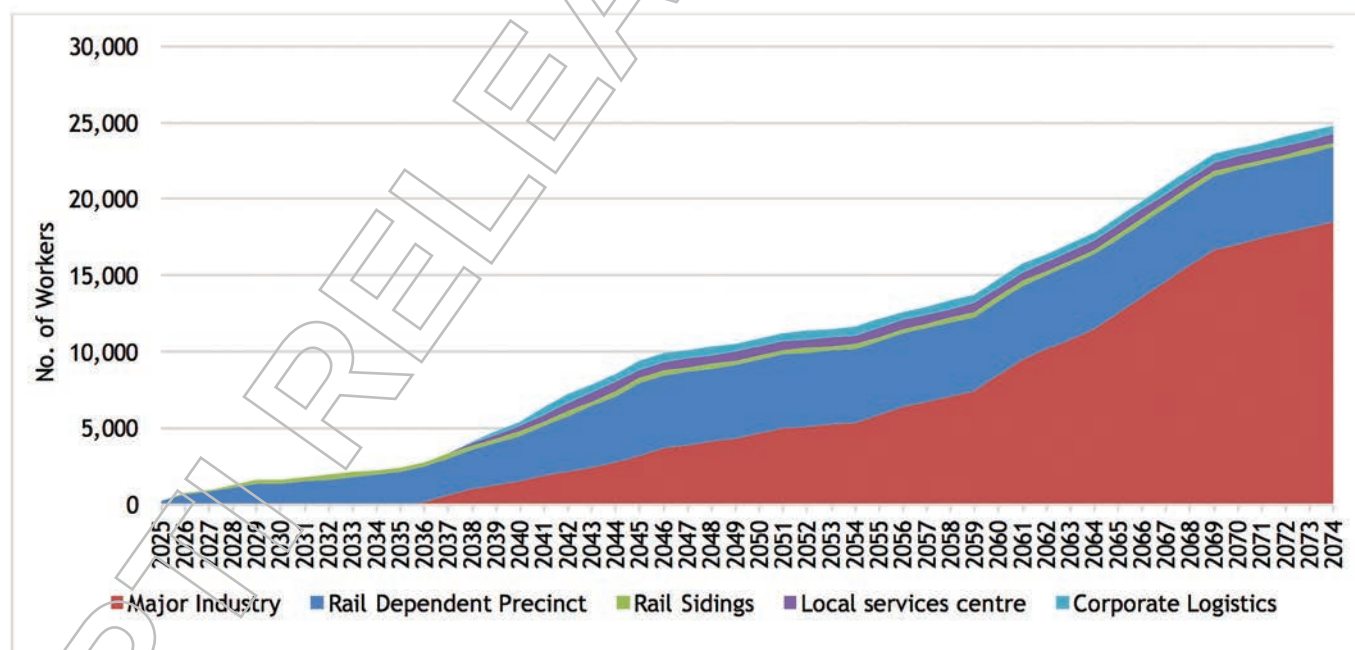


Figure 2.3: Cumulative Employment, Bromelton SDA, Extended Development Scenario

Source: Economic Associates Analysis

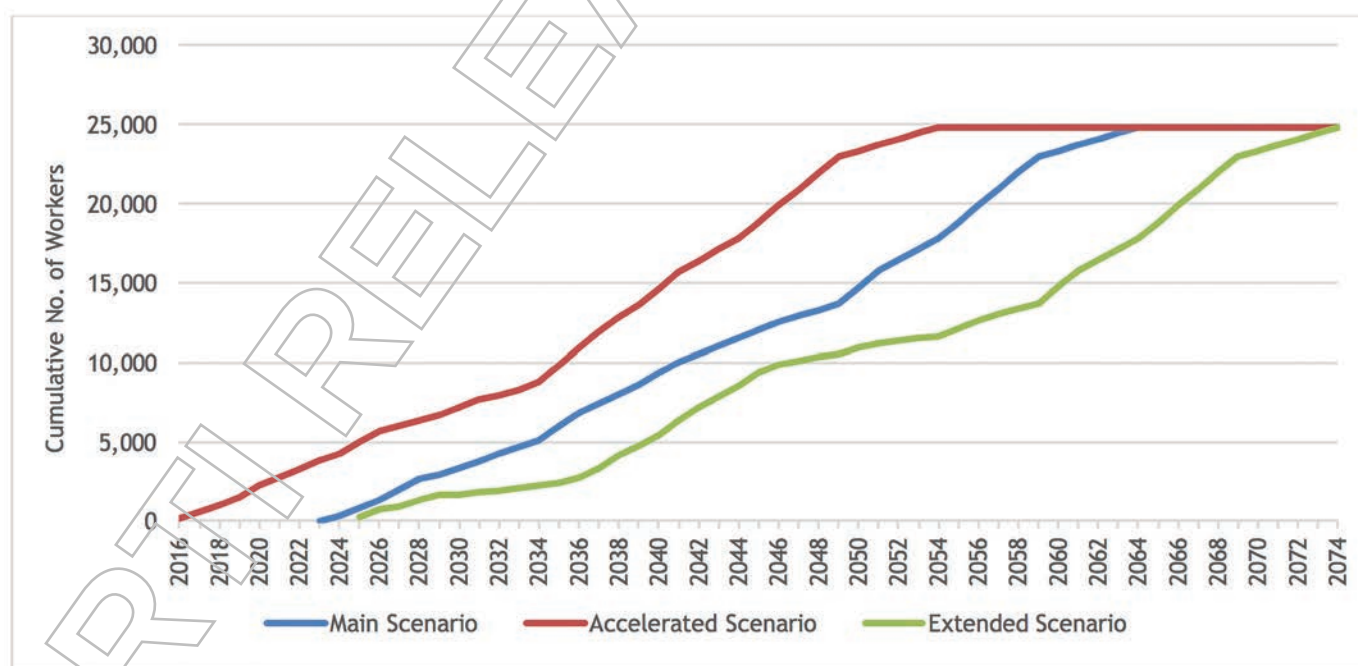
2.3 IMPLICATIONS FOR THE BROMELTON SDA AND THE SCENIC RIM

Employment within the Bromelton SDA is anticipated to peak at 24,802 workers once fully developed. The employment workforce is expected to peak in 2064 under the main scenario, in 2054 under the accelerated scenario and in 2074 under the extended scenario as illustrated in Figure 2.4.

Given the nature of development intended within the Bromelton SDA (as a major industrial node), the Bromelton SDA is likely to attract/require workers predominantly within industrial sectors such as transport, postal and warehousing. The establishment of the SCT Logistics freight terminal (currently under construction) is likely to serve as a catalyst for other potential logistics and warehousing businesses to develop a significant transport and logistics hub within the Bromelton SDA. The construction of the SCT Logistics freight terminal is expected to create 1,000 jobs onsite upon completion, indicating that at this stage development of the Bromelton SDA is in line with the accelerated development scenario.

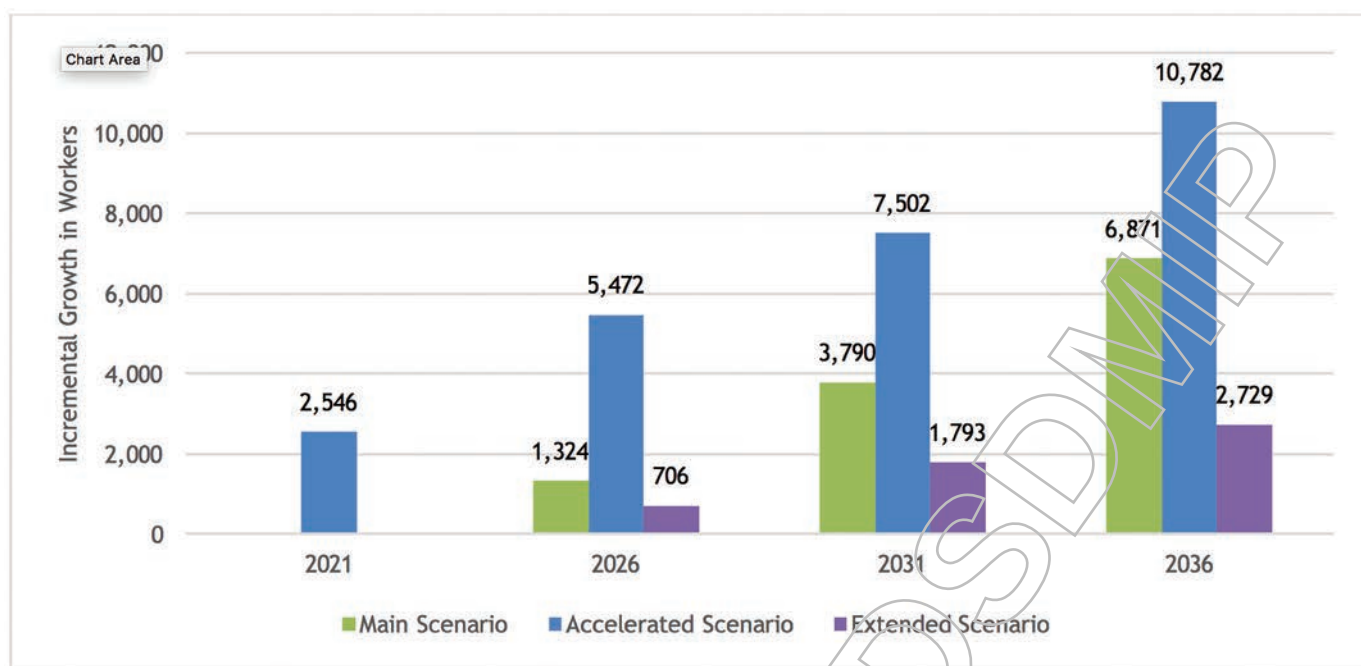
The ongoing development of the Bromelton SDA will generate significant demand for a skilled blue collar workforce, with the majority likely to be sourced from the two main centres of the Scenic Rim (i.e. Beaudesert and Boonah). Due to the proximity and connectivity of Beaudesert to Bromelton, Beaudesert would likely serve as the primary source of workers for the Bromelton SDA with Boonah providing a secondary source. However, with the Scenic Rim (including Beaudesert and Boonah) generally characterised by an older demographic, an increasing proportion of persons aged 65 years and older and a diminishing proportion of persons of working age (i.e. persons aged 15 years to 54 years), alternative sources of available workforce are likely to be required to supplement any shortfalls (in skills and/or number of workers) within the local workforce. This is further discussed in Chapter 3. Figure 2.5 illustrates the incremental growth in employment by development scenario for the Bromelton SDA in the short to medium term between 2021 and 2036.

Figure 2.4: Cumulative Total Employment by Development Scenario, Bromelton SDA



Source: Queensland Urban Utilities, Economic Associates Analysis

Figure 2.5: Incremental Growth in Employment by Development Scenario, Bromelton SDA, 2021 to 2036



Source: Economic Associates Analysis

3. AVAILABLE LOCAL WORKFORCE

In assessing the available local workforce to service the employment requirements of Bromelton, Economic Associates has assessed the demographic and employment characteristics of the resident workforce coupled with the anticipated population growth (in particular working age population growth) of the Beaudesert and Boonah SA2s as well as the Scenic Rim Local Government Area (LGA). As the largest centre within the Scenic Rim and the most proximate to the Bromelton SDA, Beaudesert is likely to experience the majority of flow-on effects derived from the development of the Bromelton SDA. As a secondary centre within the Scenic Rim with connectivity to the Bromelton SDA via the Beaudesert Boonah Road, Boonah is also likely to experience the flow-on effects derived from the Bromelton SDA (albeit to a lesser extent to Beaudesert).

Demographic data is based on historical data derived from the Australian Bureau of Statistics (ABS) Census of Population and Housing (2001, 2006 and 2011) with population projections derived from projections prepared by the Queensland Government Statistician's Office

(QGSO). The development of Bromelton would necessitate a recasting of the QGSO projections.

3.1 LOCAL WORKFORCE PROFILE

A time series profile of the Beaudesert and Boonah SA2s between 2001 and 2011 (based on the results of the ABS Census of Population and Housing) has been undertaken to provide an overview of the demographic changes recorded within these communities. For comparison purposes, the demographic statistics of Boonah, Beaudesert and Scenic Rim Regional Council have been benchmarked to Greater Flagstone/Yarrabilba, Greater Springfield, Northern Gold Coast, North Lakes, South East Queensland and Queensland as summarised in Tables B.1 and B.2 in the Appendix B.

The demographic profile also provides a contextual overview of the characteristics of the local workforce population. The following provides a brief summary of the key characteristics of the Scenic Rim, Beaudesert and Boonah communities.

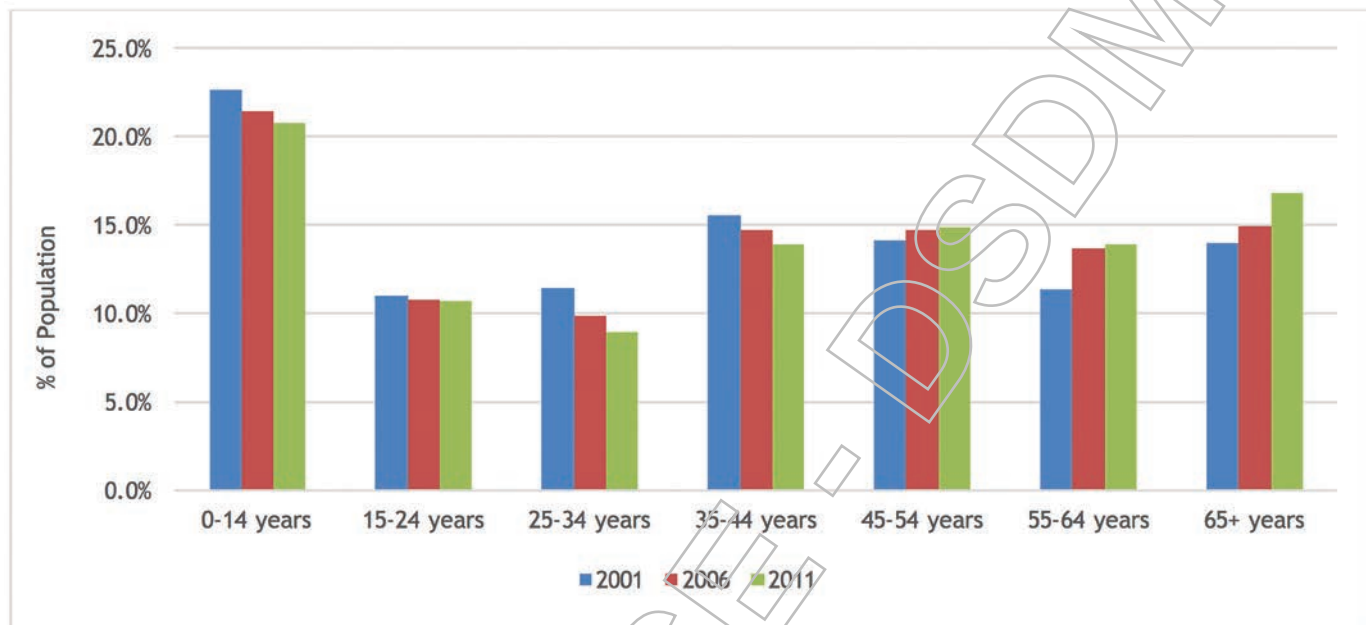
SCENIC RIM

The Scenic Rim is characterised by an older demographic with a high proportion of persons aged 65 years and older (increasing from

14.0% in 2001 to 16.8% in 2011) and a lower incidence of persons aged 25 to 34 years (decreasing from 11.4% in 2001 to 9.0% in 2011). Generally the proportion of persons aged 34 years and younger has been decreasing since 2001, whilst the proportion of persons aged 35

years and older has been increasing. The average age of residents within Scenic Rim has increased from 37.5 years in 2001 to 40.4 years in 2011. Figure 3.1 illustrates the age profile of the Scenic Rim by age cohort between the 2001 and 2011 censuses.

Figure 3.1: Age Profile by Age Cohort, Scenic Rim, 2001 to 2011



Source: ABS Census of Population and Housing, Economic Associates Analysis

Education attainment levels improved within the Scenic Rim, with the proportion of residents with a non-school qualification increasing from 29.0% in 2001 to 40.7% in 2011. The proportion of residents with a diploma/certificate increased from 20.7% to 28.0% between 2001 and 2011.

With a higher proportion of persons aged 65 years and older, the Scenic Rim recorded lower workforce participation rates to the exemplar locations (generally in excess of 70% in 2011). Workforce participation rates for the Scenic Rim marginally increased from 58.5% in 2001 to 59.6% in 2011.

Agriculture, forestry and fishing remains a key industry sector of employment for Scenic Rim residents although the proportion of residents employed within this sector has decreased from 13.3% in 2001 to 8.9% in 2011. Other key industry sectors of employment health care and social assistance, construction and retail trade. The proportion of persons employed in

non-population serving sectors⁴ (i.e. those sectors not considered to directly service the population) decreased from 45.6% to 43.5% between 2001 and 2006.

Overall, the Scenic Rim is anticipated to maintain an older demographic with lower levels of workforce participation rates and a lower proportion of a skilled workforce. The demographic characteristics of the Scenic Rim are unlikely to be sufficient to support the long term development of Bromelton as a significant industrial node. Consequently, alternative sources of available workforce are likely to be required to supplement shortfalls in skills within the available local workforce.

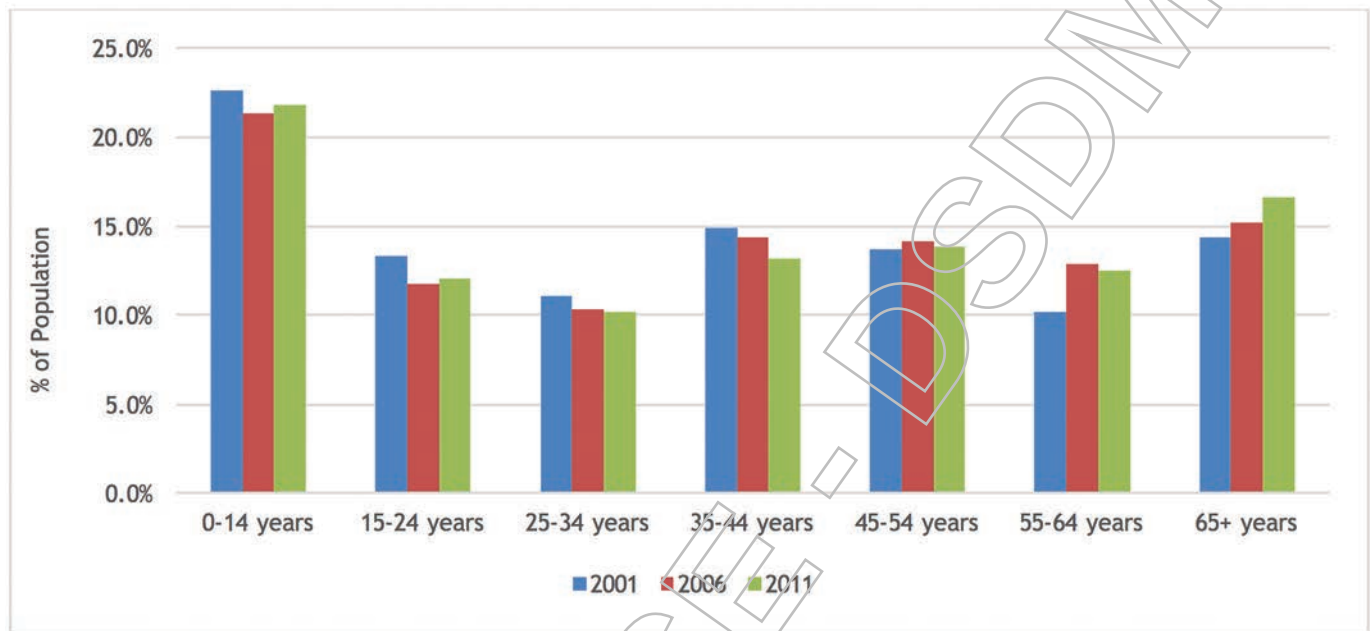
⁴ Non-population serving sectors have been defined to include Agriculture, forestry and fishing; mining; manufacturing; construction; wholesale trade; transport, postal and warehousing; professional, scientific and technical services; and administrative and support services.

BEAUDESERT

Beaundesert is generally characterised by an older demographic with an increasing prevalence of persons aged 65 years and older increasing from 14.3% to 16.6% between 2001 and 2011, with the proportion of persons aged

25-34 years decreasing from 11.1% in 2001 to 10.1% in 2011. The average age of Beaundesert residents increased from 37.4 years to 39.3 years. Figure 3.2 summarises the age profile of Beaundesert by age cohort between the 2001 and 2011 censuses.

Figure 3.2: Age Profile by Age Cohort, Beaundesert, 2001 to 2011



Source: ABS Census of Population and Housing, Economic Associates Analysis



Whilst education attainment levels within Beaudesert have increased between 2001 and 2011, only a third (33.3%) of residents attained a non-school qualification in 2011. The proportion of persons with a diploma/certificate increased from 17.5% to 26.0% between 2001 and 2011.

Between 2001 and 2011, workforce participation rates within Beaudesert marginally declined from 57.2% to 57.0%, which is much lower than the exemplar locations (in excess of 70% as of 2011) as well South East Queensland (63.2% in 2011) and Queensland (62.2% in 2011). This is reflective of the higher proportion of persons aged 65 years and older.

Agriculture, forestry and fishing is the main industry of employment of Beaudesert residents, with manufacturing, health care and social assistance and construction also key industry sectors of employment for local residents.

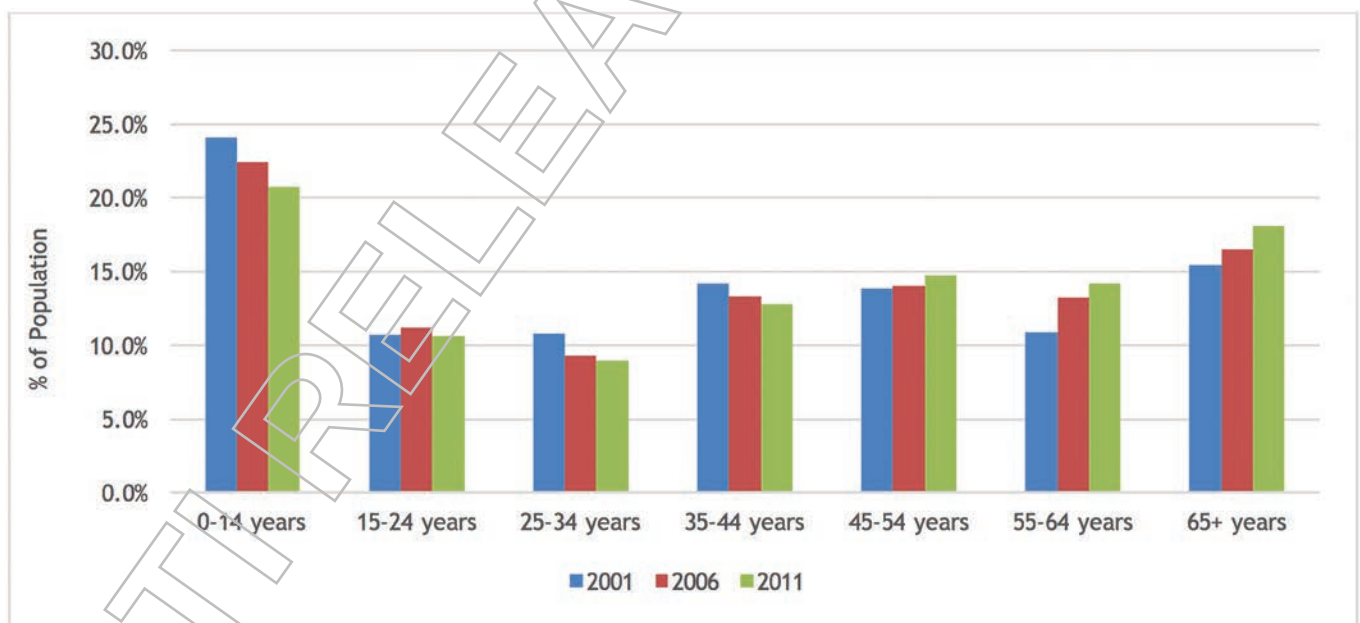
As an older demographic with a lower proportion of skilled workforce, Beaudesert is unlikely to have the necessary skills and available

workforce to service the future development of Bromelton the long term. In the short to medium term, Beaudesert is likely to continue to comprise an older demographic with a lower proportion of a skilled blue collar workforce. In the longer term, the Beaudesert community has the potential to attract a slightly younger demographic as Bromelton develops and seeks access to a younger skilled demographic.

BOONAH

Boonah exhibits a similar demographic to Beaudesert, generally characterised by an older community with the proportion of persons aged 65 years and older in Boonah increasing from 15.4% to 18.0% between 2001 and 2011. Significantly, persons aged 25 to 34 years accounts for only a small proportion of Boonah residents decreasing from 10.8% in 2001 to 9.0% in 2011. The average age of Boonah residents increased from 32.4 years in 2001 to 40.9 years in 2011. Figure 3.3 illustrates the age profile of Boonah by age cohort between the 2001 and 2011 censuses.

Figure 3.3: Age Profile by Age Cohort, Boonah, 2001 to 2011



Source: ABS Census of Population and Housing, Economic Associates Analysis

Boonah exhibited slightly higher education attainment levels compared to Beaudesert, with the proportion of residents with a non-school qualification increasing from 24.1% in 2001 to 36.3% in 2011. The proportion of persons with a diploma/certificate increased from 12.5% to 26.8% between 2001 and 2011.

Workforce participation rates within Boonah increased from 58.1% to 59.6% between 2001 and 2011, although this remains much lower than the exemplar locations (in excess of 70% in 2011). The lower workforce participation rates are reflective of the higher proportion of persons aged 65 years and older within the Boonah community.

Agriculture, forestry and fishing has remained the main industry of employment for Boonah residents between 2001 and 2011, with health care and social assistance and retail trade also key industry sectors of employment of residents.

Boonah has traditionally had a higher incidence of older persons and is likely to maintain an older demographic in the long term. The older demographic and workforce characteristics (generally a lower proportion of skilled blue collar workers) is likely to be insufficient to support

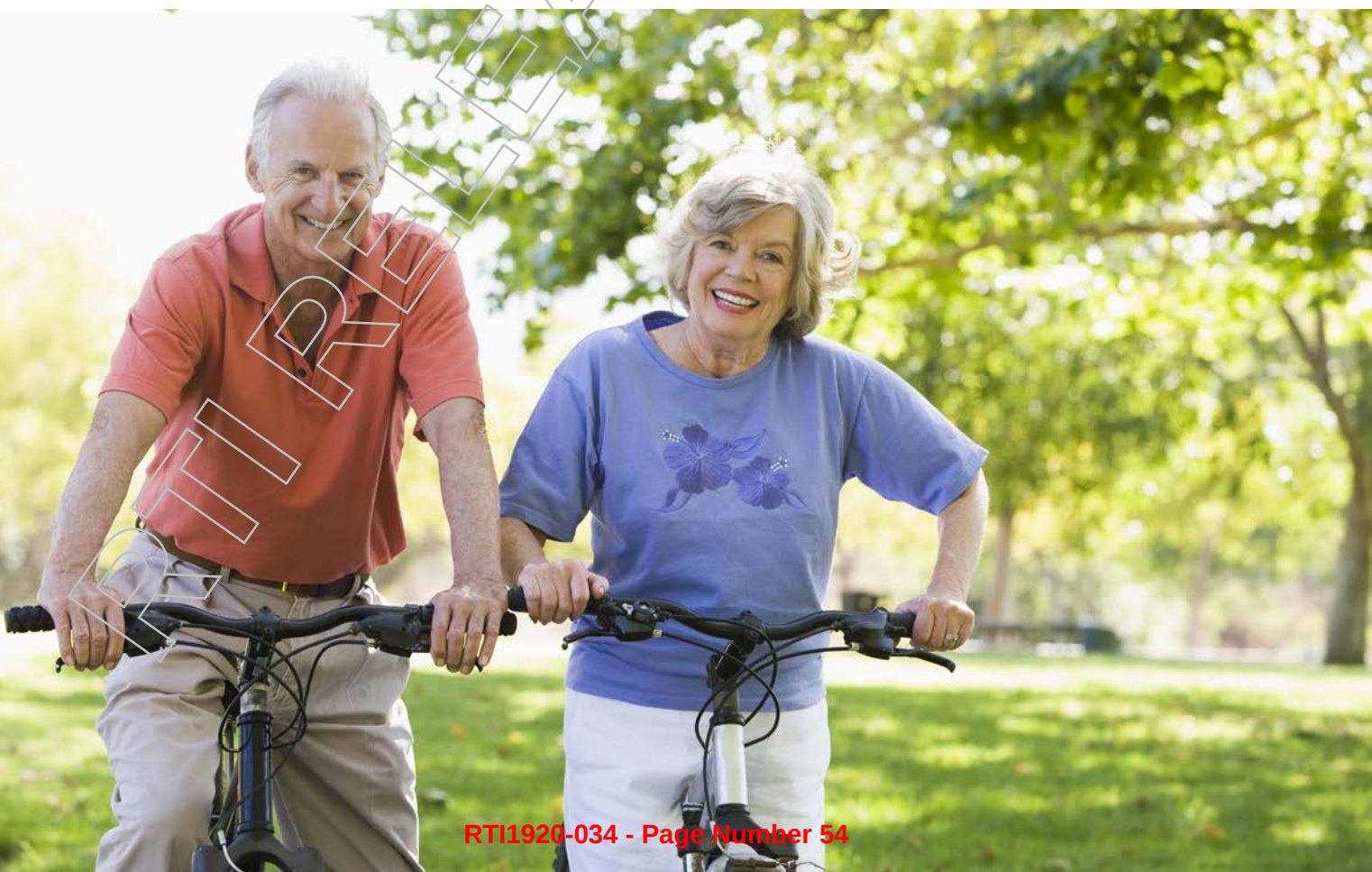
the long term development of Bromelton as a significant industrial node.

3.1.1 IMPLICATIONS FOR THE BROMELTON SDA AND THE SCENIC RIM

The Scenic Rim (including Beaudesert and Boonah) is characterised by an older demographic with lower levels of workforce participation (reflective of the high and increasing proportion of persons aged 65 years and older) and lower educational attainment levels. Consequently, the demographic characteristics of the available workforce suggests that alternative sources of a young skilled blue collar workforce will be required to support the long term development of the Bromelton SDA.

3.2 AVAILABLE LOCAL WORKFORCE POPULATION

The following examines the historic and projected total population, working age population (i.e. persons aged 15 to 64 years) and retiree population (i.e. persons aged 65 years and older) for the Scenic Rim, Beaudesert and Boonah, which are summarised in Table B.3 in Appendix B. Population projections for each of these areas are based on the 2015 edition QGSO population projections (medium series).



SCENIC RIM

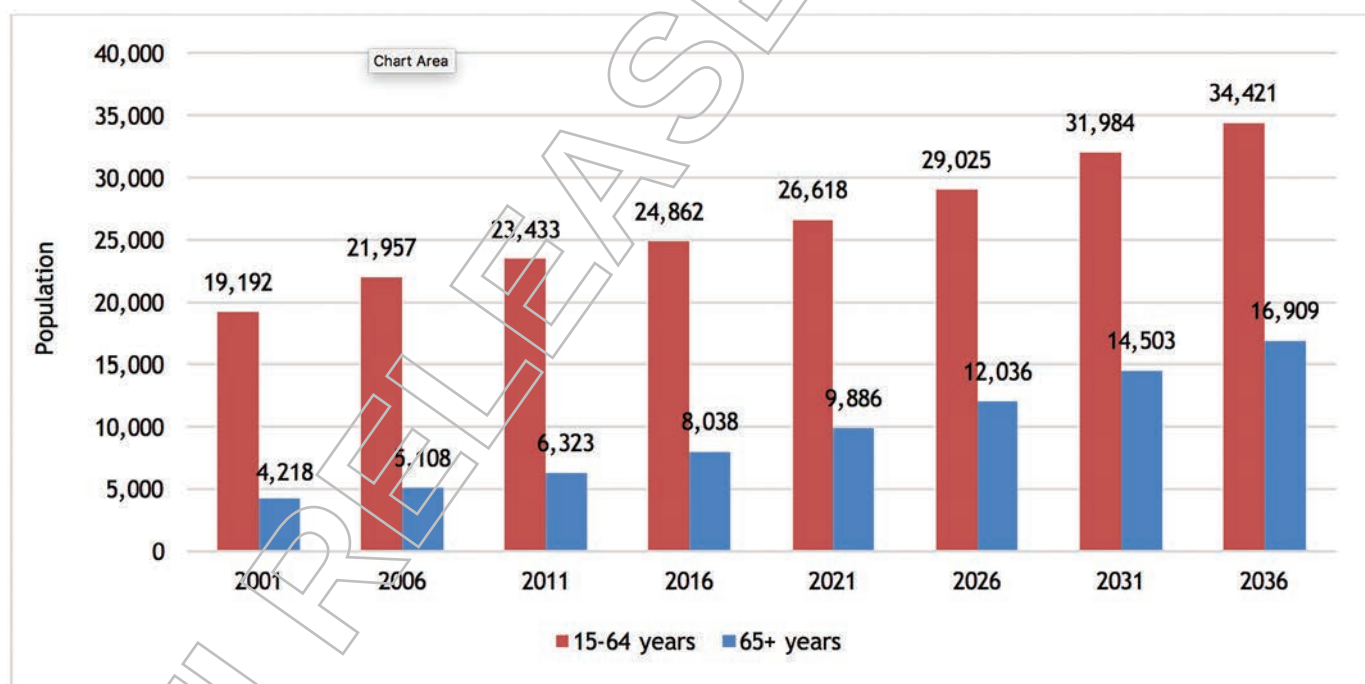
The Scenic Rim population increased from 34,231 persons in 2006 to 41,014 persons in 2016 (average growth of 1.8% per annum). Between 2021 and 2036, the Scenic Rim population is projected to increase from 45,813 persons to 63,396 persons.

The working age population (i.e. persons aged 15-64 years) of the Scenic Rim was 21,957 persons in 2006 (accounting for 64.1% of the total Scenic Rim population) increasing to 24,862 persons by 2016 (accounting for 60.6% of the total Scenic Rim population). Between 2021 and 2036, the working age population of the Scenic Rim is projected to increase from 26,618 persons to 34,421 persons. The working age population of the Scenic Rim as a proportion of the total population is anticipated to decline from 59.6% in 2016 to 54.3% by 2036.

As a popular destination for older persons, the QGSO anticipates that the Scenic Rim would experience strong growth in the 65+ years age cohort increasing from 5,108 persons in 2006 (accounting for 14.9% of the total Scenic Rim population) to 8,038 persons by 2016 (accounting for 19.6% of the total Scenic Rim population). By 2036 the QGSO anticipates the retiree population to increase to 16,909 persons accounting for over a quarter of the total Scenic Rim population (26.7%).

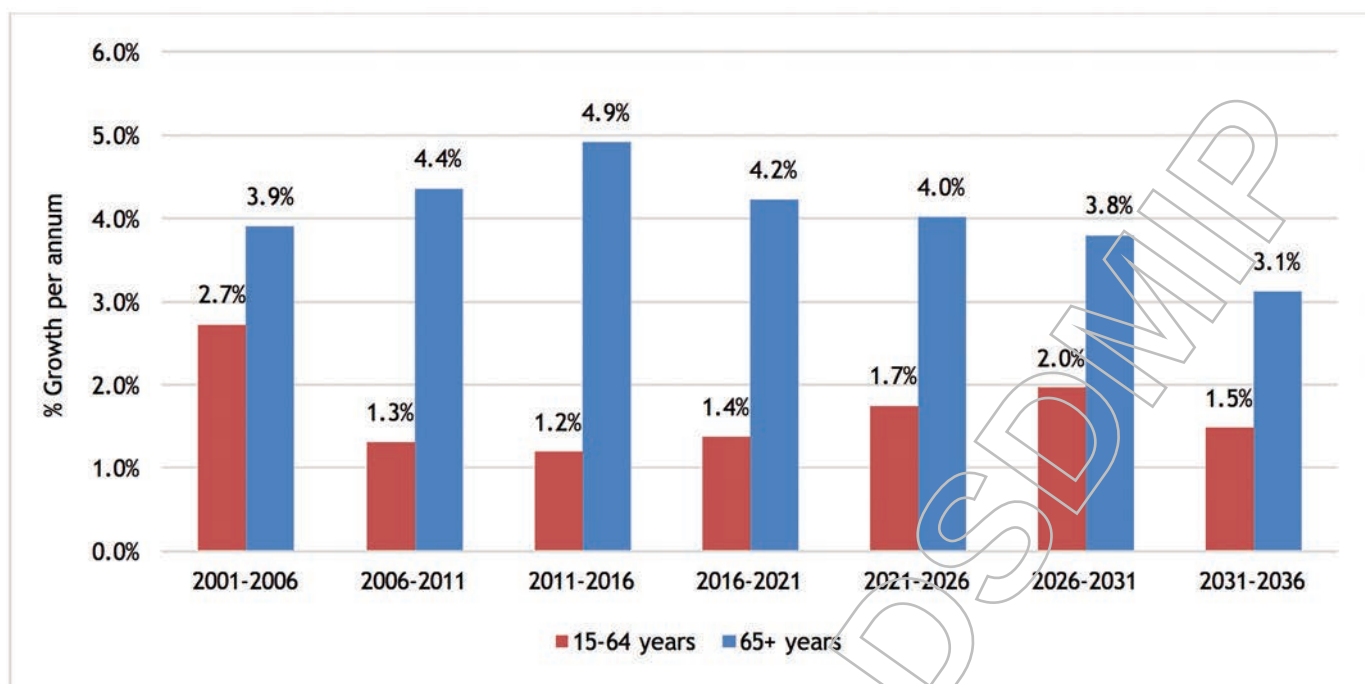
Figure 3.4 compares the projection population growth of the working age and retiree population for the Scenic Rim between 2001 and 2036. Figure 3.5 compares the average growth per annum for the working age population compared to the retiree population for the Scenic Rim between 2001 and 2036.

Figure 3.4: Working Age Population v Retiree Population, Scenic Rim, 2001 to 2036



Source: ABS, Queensland Government Statisticians Office (2015), Economic Associates Analysis

Figure 3.5: Working Age Population v Retiree Population, Average growth per annum, Scenic Rim, 2001 to 2036



Source: ABS, Queensland Government Statisticians Office (2015), Economic Associates Analysis

Three workforce scenarios have been developed to estimate the size of the available local workforce within the Scenic Rim based on the QGSO projections as follows:

- **Total available workforce:** this scenario assumes that the total available workforce (i.e. total employment multiplied by labour force participation rate)⁵ equates to 55% of the total working age population;
- **Workforce in employed non-population serving sectors:** this scenario assumes on average 45% of the total available workforce is employed in non-population serving sectors⁶; and

- **Workforce employed in industrial sectors:** this workforce scenario assumes on average 28% of the total available workforce is employed in industrial sectors⁷.

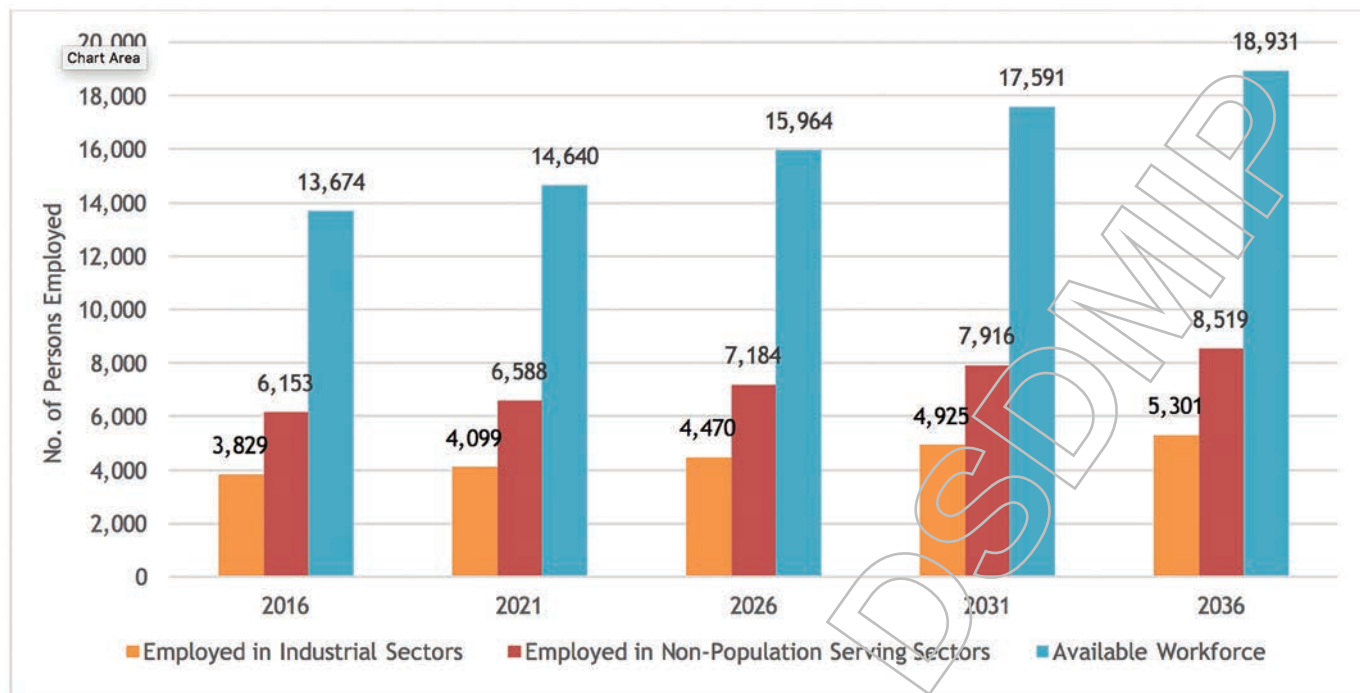
Figure 3.6 compares the available local workforce estimates based on the above workforce scenarios. Figure 3.7 illustrates the incremental growth for the three workforce scenarios. The total available workforce for the Scenic Rim is estimated to be 13,674 persons in 2016 increasing to 18,931 persons by 2036. Based on persons employed in non-population serving sectors, the workforce population is estimated to be 6,153 persons in 2016 increasing to 8,519 persons by 2036. In terms of persons employed in industrial sectors, the workforce population is estimated at 3,829 persons in 2016 increasing to 5,301 persons by 2036.

⁵ Based on ABS Census data, total employment in the Scenic Rim was 93.3% in 2001, 65.9% in 2006 and 94.1% in 2011. Labour force participation rates for the Scenic Rim was 58.5% in 2001, 59.4% in 2006 and 59.6% in 2011. Based on the above rates the average total available workforce (i.e. total employment multiplied by labour force participation) was 55.9%. For the purposes of this analysis, 55% has been adopted.

⁶ Average based on the 2001, 2006 and 2011 Census results, which indicate the proportion of persons employed in non-population serving sectors (including agriculture, forestry and fishing; mining; manufacturing; construction; wholesale trade; transport, postal and warehousing; professional, scientific and technical services; and administrative and support services) was 45.6% in 2001, 44.0% in 2006 and 43.5% in 2011, equating to an average of 44.3%. For the purposes of this analysis 45% has been adopted.

⁷ Average based on the 2001, 2006 and 2011 Census results which indicate the proportion of persons employed in industrial sectors (including mining, manufacturing, construction, wholesale trade and transport, postal and warehousing) was 26.5% in 2001, 28.1% in 2002 and 27.4% in 2011, equating to an average of 28.8%. For the purposes of this analysis 28% has been adopted.

Figure 3.6: Total Available Workforce v Persons Employed in Non-Population Serving Sectors v Persons Employed in Industrial Sectors, Scenic Rim, 2016 to 2036



Source: ABS Census of Population and Housing (Various Years) Economic Associates Analysis

Figure 3.7: Incremental Growth in Employed Persons, Scenic Rim, 2021 to 2036



Source: Economic Associates Analysis

BEAUDESERT

Between 2006 and 2015, the total resident population of Beaudesert increased from 11,314 persons to 13,735 persons. The Beaudesert population is anticipated to achieve strong population growth between 2016 and 2036 of 4.1% per annum. As at 2016, the Beaudesert population is estimated to be 14,305 persons increasing to 31,669 persons by 2036.

The working age population increased from 7,187 persons in 2006 to 8,438 persons in 2015. Based on QGSO projections, the working age population of Beaudesert is anticipated to achieve an average growth rate of 3.7% per annum between 2016 and 2036, increasing from 8,593 persons to 17,623 persons. Notwithstanding, QGSO anticipates the working age population as a proportion of the total Beaudesert population would decrease from 60.1% in 2016 to 55.6% in 2036.

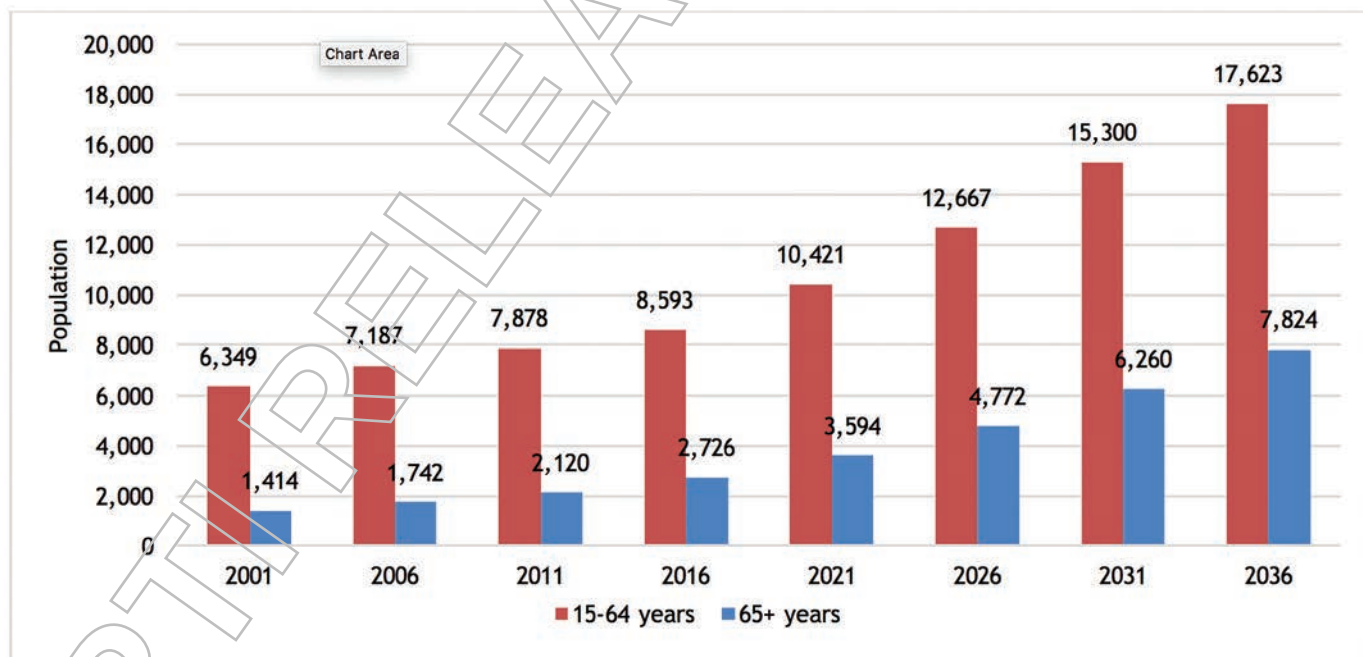
The retiree population of Beaudesert is projected to achieve higher population growth rates than both the working age population and total population between 2016 and 2036 (5.4%

per annum cf. 3.7% p.a working population and 4.1% p.a total population). The Beaudesert retiree population is projected to increase from 2,726 persons to 7,824 persons between 2016 and 2036.

The decrease in the proportion of working age population within Beaudesert reflects the higher incidence of persons aged 65 years and older (who typically have retired from the workforce) in this community. The decline in the working age population as a proportion of the total Beaudesert population poses a number of employment challenges in the long term, particularly in relation to the long term development of Bromelton. With an aging population coupled with a declining proportion of working age population, the local Beaudesert workforce is insufficient to support the employment growth and development of Bromelton in the long term.

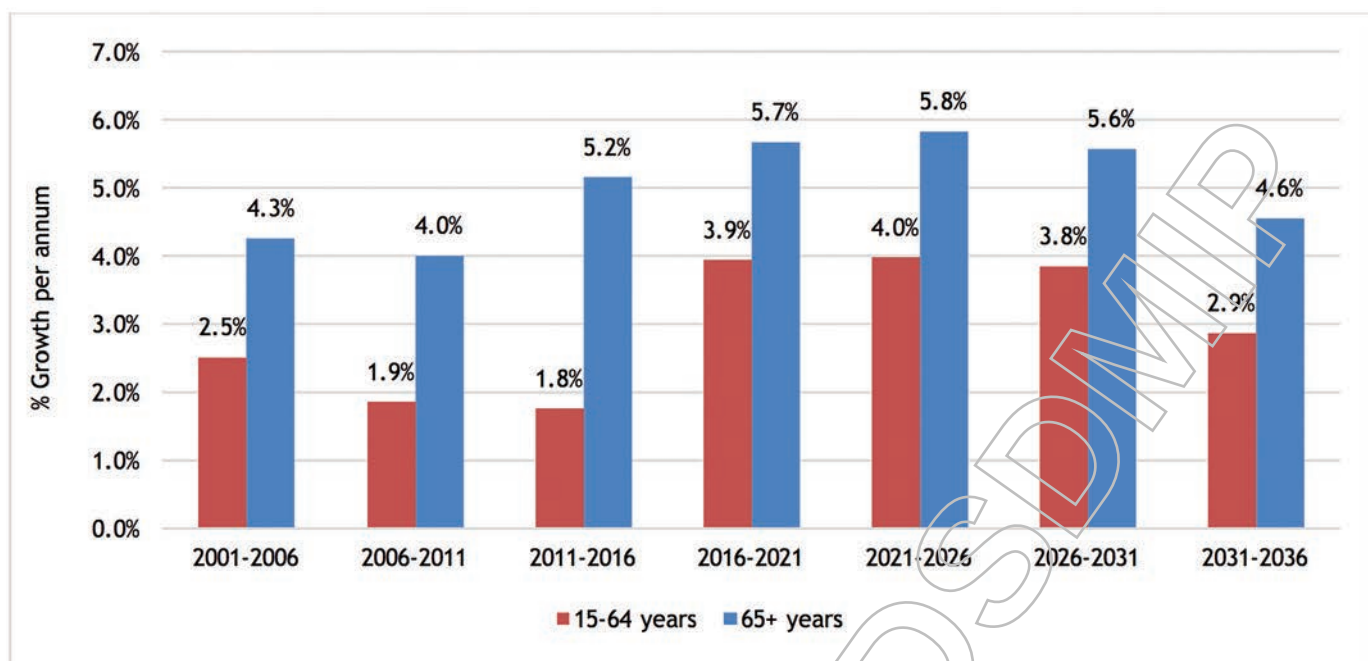
Figure 3.8 compares the working age population and retiree population between 2001 and 2036, whilst Figure 3.9 compares the average population growth per annum for working age and retiree population of Beaudesert.

Figure 3.8: Working Age Population v Retiree Population, Beaudesert, 2001 to 2036



Source: ABS, Queensland Government Statisticians Office (2015), Economic Associates Analysis

Figure 3.9: Working Age Population v Retiree Population, Average growth per annum, Beaudesert, 2001 to 2036



Source: ABS, Queensland Government Statisticians Office (2015), Economic Associates Analysis

As for the Scenic Rim as a whole, three workforce scenarios were developed to estimate that size of the available local workforce within Beaudesert based on the QGSO projections as follows:

- Total available workforce: this scenario assumes that the total available workforce (i.e. total employment multiplied by labour force participation rate)⁸ equates to 55% of the total working age population;
- Workforce employed in non-population serving sectors: this scenario assumes on average 46% of the available workforce is employed in non-population serving sectors⁹; and
- Workforce employed in industrial sectors: assumes on average 29% of the available workforce is employed in industrial sectors¹⁰.

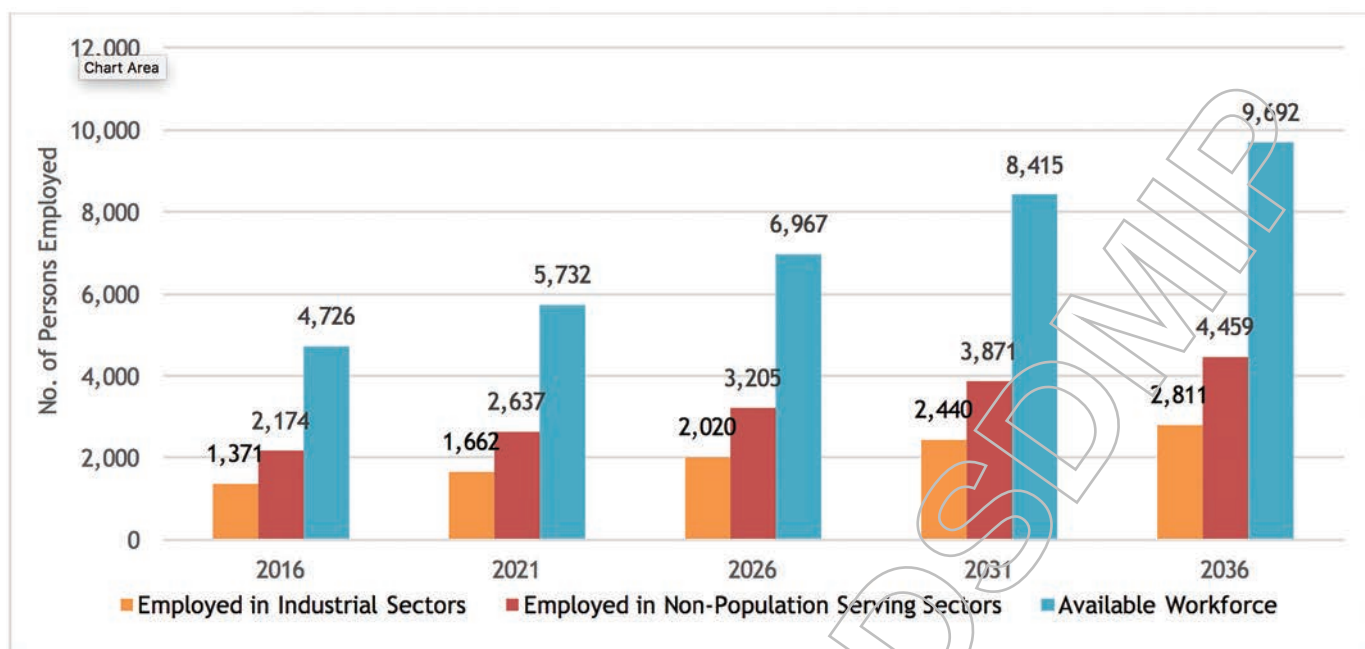
Based on the above workforce scenarios, total available workforce in Beaudesert is estimated to be 4,726 persons in 2016 increasing to 9,692 persons by 2036. Persons employed in non-population serving sectors are estimated to be 2,174 persons in 2016 increasing to 4,459 persons by 2036. Based on persons employed in industrial sectors the workforce population is estimated to be 1,371 persons in 2016 increasing to 2,811 2036. Figure 3.10 compares the three workforce scenarios for Beaudesert between 2016 and 2036. Figure 3.11 illustrates the incremental growth in workers under the three workforce scenarios between 2021 and 2036.

⁸ Based on ABS Census data, total employment in Beaudesert was 92.4% in 2001, 95.1% in 2006 and 93.1% in 2011. Labour force participation rates in Beaudesert was 57.2% in 2001, 56.6% in 2006 and 57.0% in 2011. Based on the above rates, the average total available workforce was 53.3% (i.e. total employment multiplied by labour force participation rate). For the purposes of this analysis, 55% has been adopted.

⁹ Average based on the 2001, 2006 and 2011 Census results, which indicate the proportion of persons employed in non-population serving sectors (including agriculture, forestry and fishing; mining; manufacturing; construction; wholesale trade; transport, postal and warehousing; professional, scientific and technical services; and administrative and support services) was 46.1% in 2001, 47.0% in 2006 and 45.9% in 2011, equating to an average of 46.4%. For the purposes of this analysis 46% has been adopted.

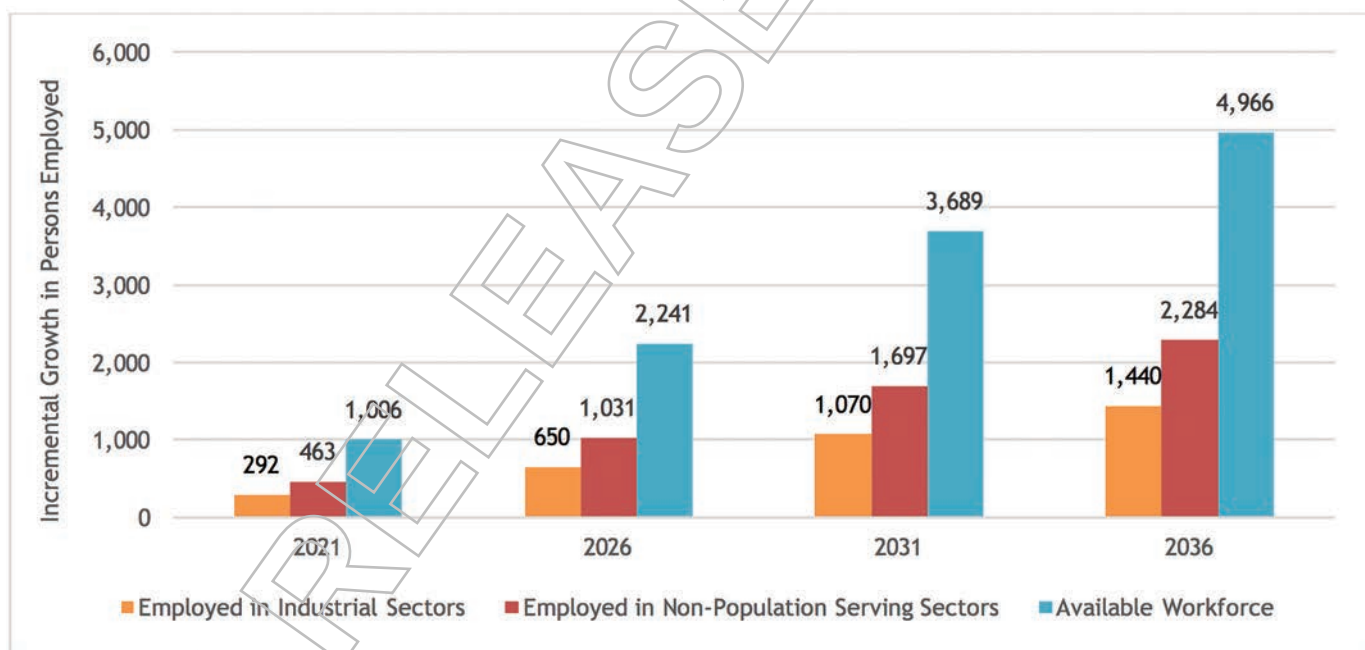
¹⁰ Average based on the 2001, 2006 and 2011 Census results, which indicate the proportion of persons employed in industrial sectors (including mining, manufacturing, construction, wholesale trade and transport, postal and warehousing) was 27.0% in 2001, 30.3% in 2006 and 29.2% in 2011, equating to an average of 29.0%. For the purposes of this analysis 29% has been adopted.

Figure 3.10: Total Available Workforce v Persons Employed in Non-Population Serving Sectors v Persons Employed in Industrial Sectors, Beaudesert, 2016 to 2036



Source: ABS Census of Population and Housing, Economic Associates Analysis

Figure 3.11: Incremental Growth in Employed Persons, Beaudesert, 2021 to 2036



Source: Economic Associates Analysis

BOONAH

Between 2006 and 2016, the population of Boonah increased from 10,419 persons to 12,020 persons. The population of Boonah is anticipated to achieve minimal population growth (1.4% per annum) between 2016 and 2036, increasing to 15,777 persons by 2036.

The working age population of Boonah, increased from 6,511 persons in 2006 to 7,164 persons in 2016. Between 2016 and 2036, the working age population of Boonah is anticipated to achieve marginal growth (0.7% per annum) increasing to 8,158 person by 2036. Consequently, the working age population as a proportion of the total Boonah population is anticipated to significantly decline from 59.6% in 2016 to 51.7% in 2036.

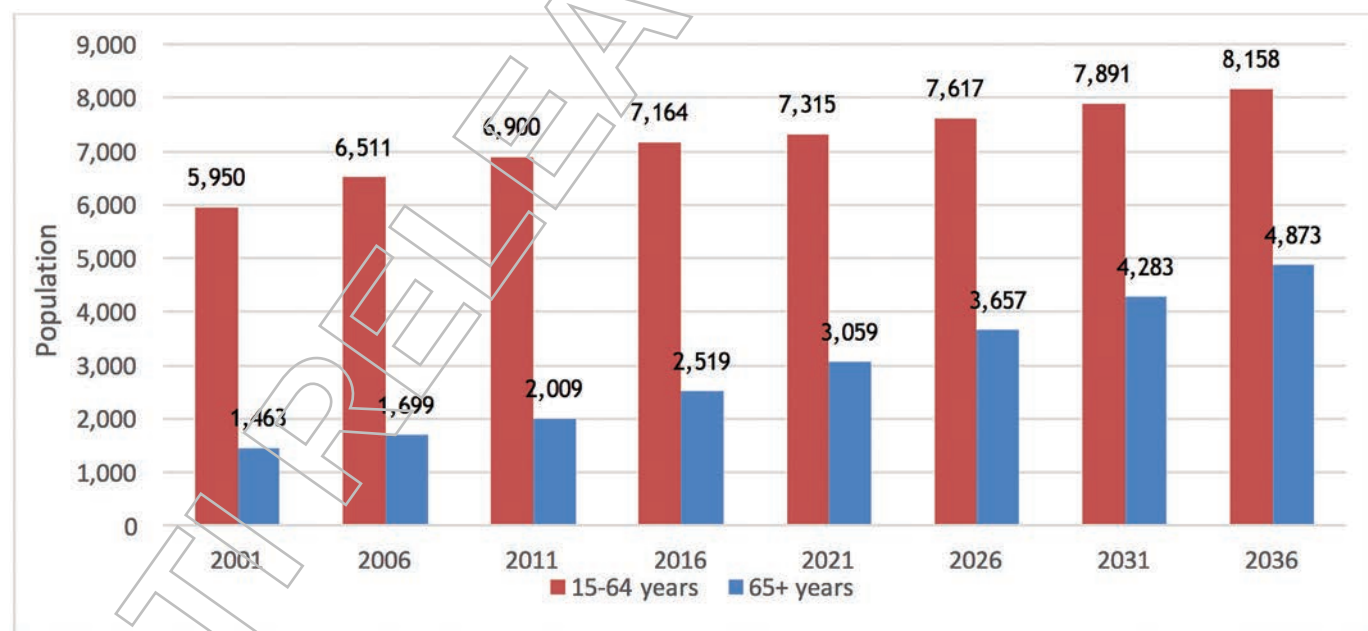
The retiree population of Boonah increased from 1,699 persons in 2006 to 2,519 persons 2016. Between 2016 and 2016, the retiree population of Boonah is projected to increase an average of 3.4% per annum (albeit lower than Beaudesert and the Scenic Rim averages of 5.1% and

4.1%, respectively) with the retiree population increasing to 4,873 persons by 2036.

Boonah has a high incidence of persons aged 65 years and older (who typically have retired from the workforce) resulting in a lower proportion of persons remaining within the workforce as reflected by the decrease in the proportion of the working age population. The working age population of Boonah is anticipated to achieve minimal growth between 2016 and 2036, accounting for less than half of the projected working age population of Beaudesert by 2036. While the local Boonah workforce may partly supplement shortfalls in the local Beaudesert available workforce, this is still unlikely to be sufficient to support the growth and development of Bromelton.

Figure 3.12 compares the working age population and retiree population between 2001 and 2036, whilst Figure 3.13 compares the average population growth per annum for working age and retiree population of Beaudesert.

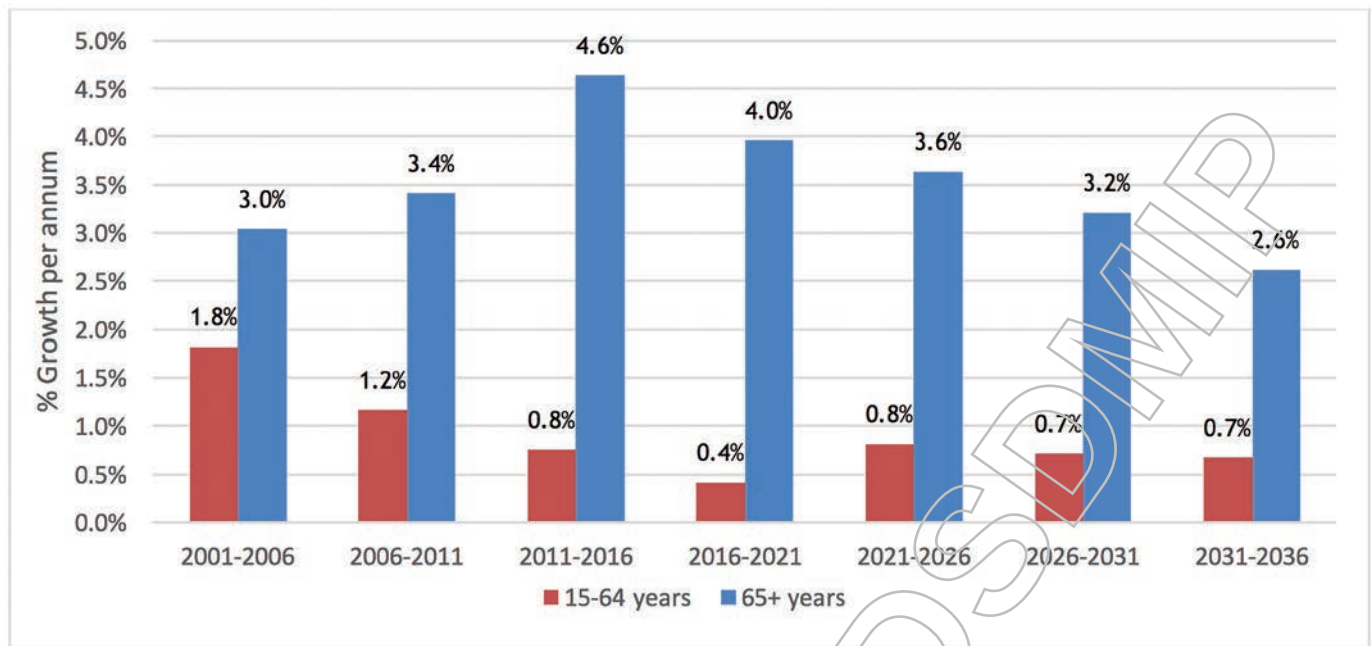
Figure 3.12: Working Age Population v Retiree Population, Boonah, 2001 to 2036



Source: ABS, Queensland Governments Statisticians Office (2015), Economic Associates Analysis



Figure 3.13: Working Age Population v Retiree Population, Average growth per annum, Boonah, 2001 to 2036



Source: ABS, Queensland Government Statisticians Office (2015), Economic Associates Analysis

As for Beaudesert, three workforce scenarios were developed to estimate the size of the available local workforce within Boonah (derived from the QGSO projections) as follows:

- **Total available workforce:** this scenario assumes that the total available workforce (i.e. total employment multiplied by labour force participation rate)¹¹ equates to 60% of the total working age population;
- **Workforce in non-population serving sectors:** this scenario assumes on average 50% of the available workforce is employed in non-population serving sectors¹²; and
- **Workforce in industrial sectors:** assumes on average 27% of the available workforce is employed in industrial sectors¹³.

Based on the above workforce scenarios, total available workforce in Boonah is projected to increase (derived from the QGSO projections) from 4,298 persons in 2016 to 4,895 persons in 2036. Persons employed in non-population serving sectors are projected to increase from 2,149 persons to 2,447 persons between 2016 and 2036, whilst persons employed in industrial sectors is projected to increase from 1,161 persons in 2016 to 1,322 persons by 2036.

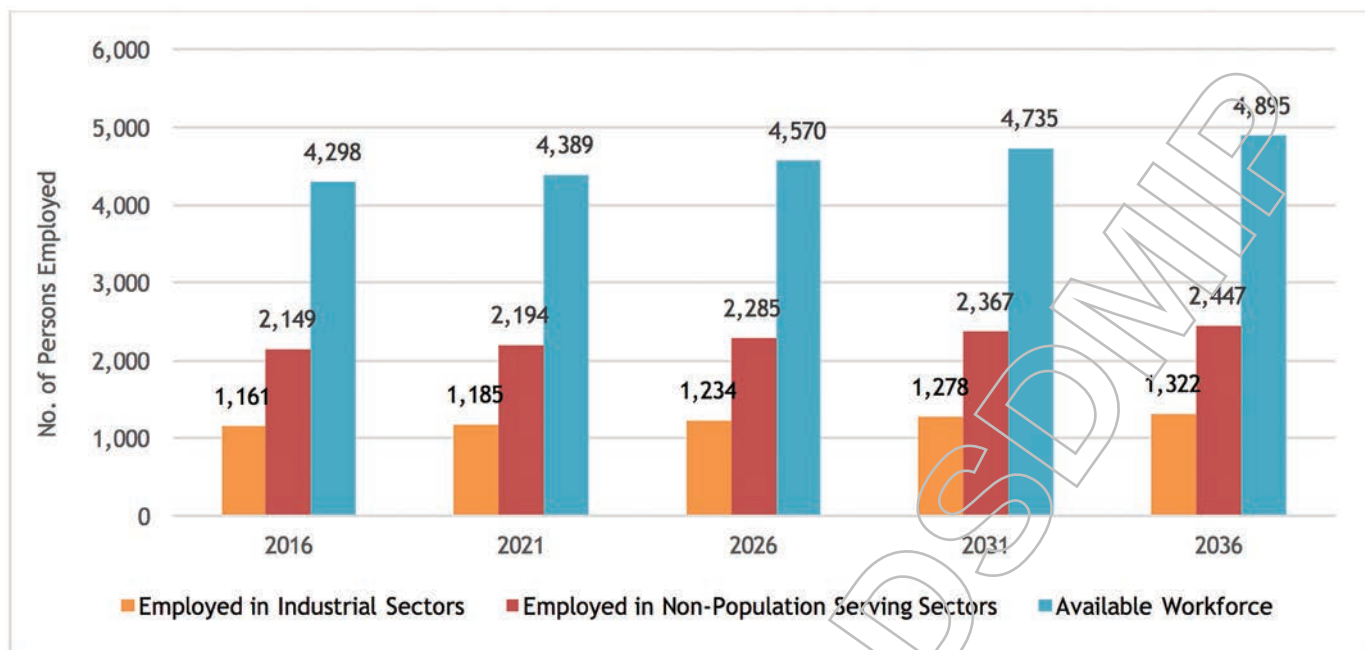
Figure 3.14 compares the three workforce scenarios for Boonah between 2016 and 2036. Figure 3.15 compares the incremental growth in workers under the three workforce scenarios.

¹¹ Based on ABS Census data, total employment in Boonah was 95.3% in 2001, 96.4% in 2006 and 95.4% in 2011. Labour force participation rates in Boonah was 58.1% in 2001, 59.8% in 2006 and 59.6% in 2011. Based on the above rates, the average total available workforce was 56.6% (i.e. total employment multiplied by labour force participation rate). For the purposes of this analysis, 60% has been adopted.

¹² Average based on the 2001, 2006 and 2011 Census results, which indicate the proportion of persons employed in non-population serving sectors (including agriculture, forestry and fishing; mining; manufacturing; construction; wholesale trade; transport, postal and warehousing; professional, scientific and technical services; and administrative and support services) was 54.0% in 2001, 49.0% in 2006 and 47.9% in 2011, equating to an average of 50.3%. For the purposes of this analysis 50% has been adopted.

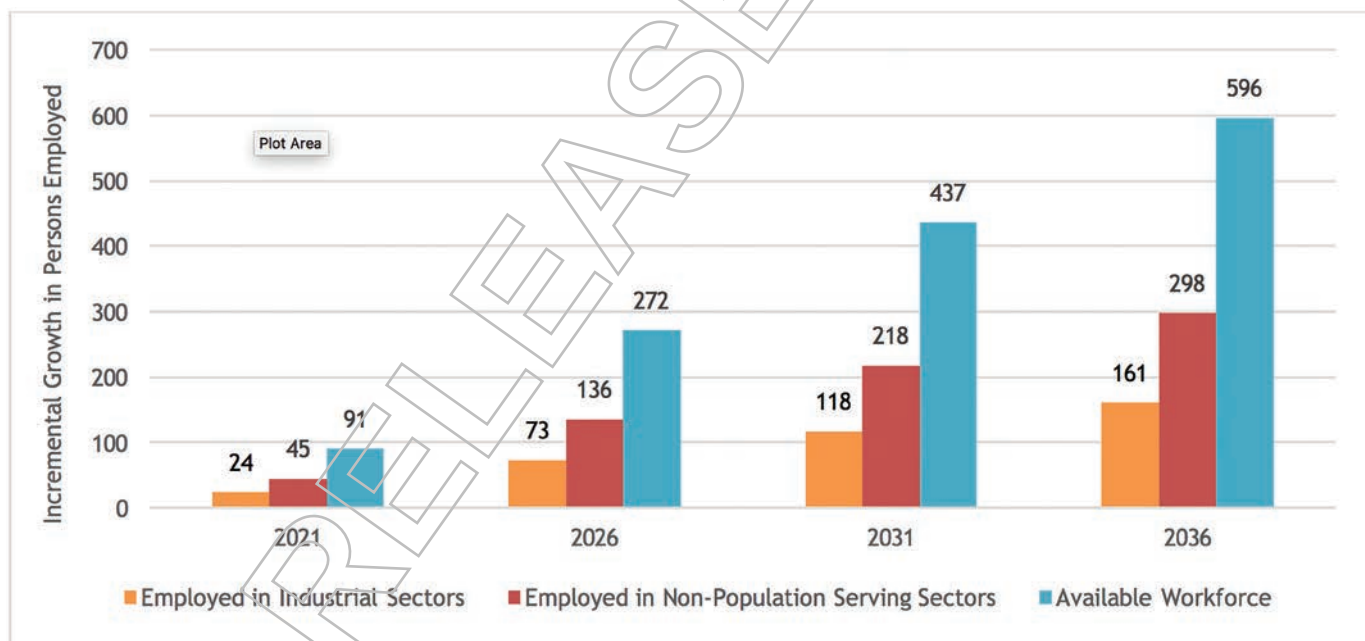
¹³ Average based on the 2001, 2006 and 2011 Census results, which indicate the proportion of persons employed in industrial sectors (including mining, manufacturing, construction, wholesale trade and transport, postal and warehousing) was 29.2% in 2001, 29.5% in 2006, and 28.3% in 2011, equating to an average of 27.3%. For the purposes of this analysis 27% has been adopted.

Figure 3.14: Total Available Workforce v Persons Employed in Non-Population Serving Sectors v Persons Employed in Industrial Sectors, Boonah, 2016 to 2036



Source: ABS Census of Population and Housing, Economic Associates Analysis

Figure 3.15: Incremental Growth in Employed Persons, Boonah, 2021 to 2036



Source: Economic Associates Analysis

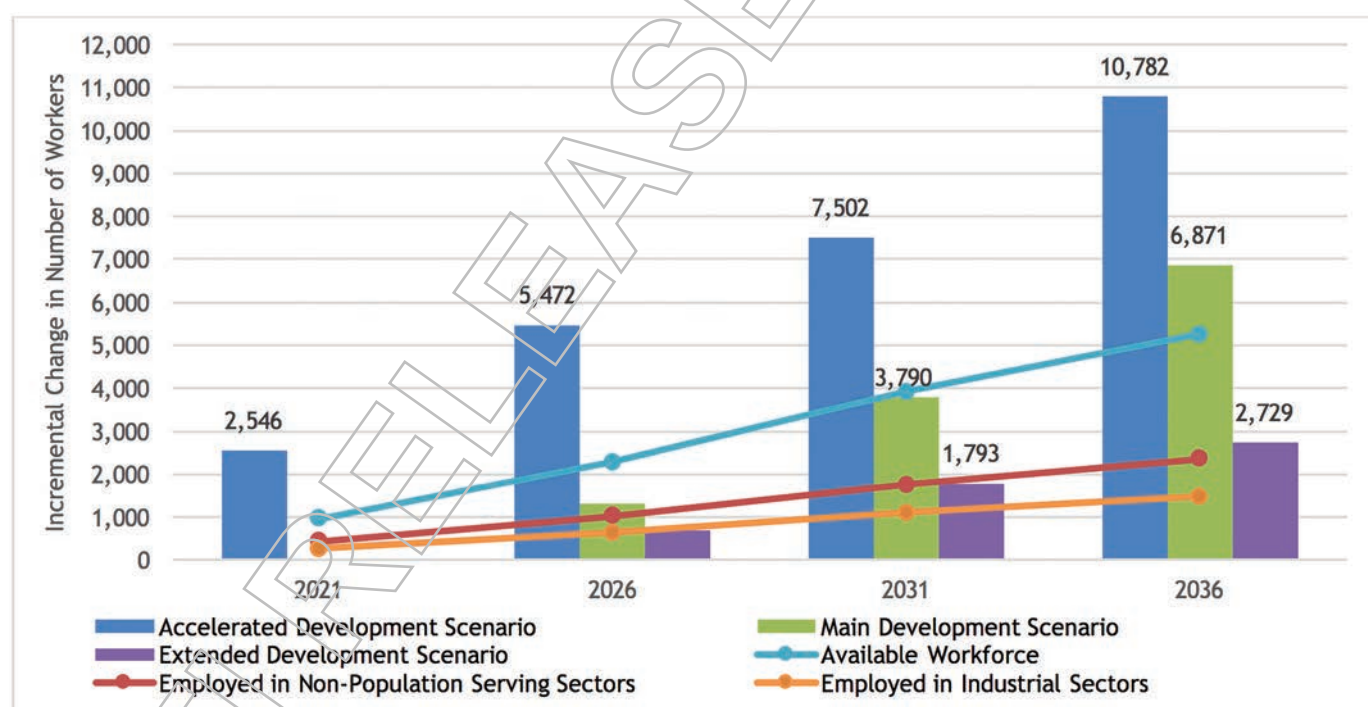
3.2.1 IMPLICATIONS FOR THE SCENIC RIM, BEAUDESERT AND BROMELTON SDA

With an older demographic comprising a higher incidence of persons aged 65+ years (and increasing) the working age population as a proportion of the total population is likely to continue to decline within the Scenic Rim (including Beaudesert and Boonah). Given the proximity of Bromelton to Beaudesert, Beaudesert could reasonably be expected to be the main source of available local workforce with Boonah likely to represent a secondary source.

Comparison of the incremental growth in the Scenic Rim of employment (total available workforce, persons employed in non-population serving sectors and persons employed in industrial sectors) with the employment yield for Bromelton between 2016 and 2036 highlights a shortfall in workers to support development of

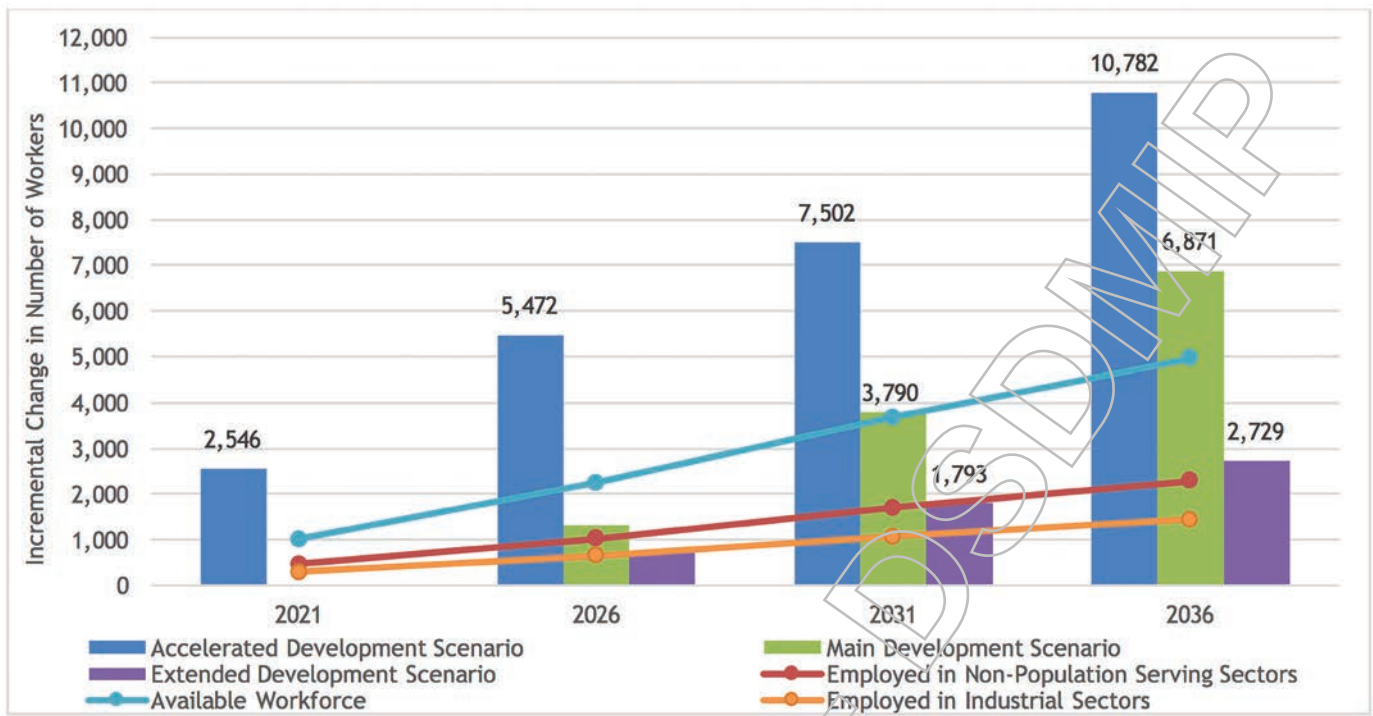
the Bromelton SDA by 2036 under all three development scenarios. As previously discussed in Chapter 2, the development of the SCT Logistics freight terminal facility suggests development of Bromelton at this stage is in line with the accelerated development scenario. Assuming, development continues to align with the accelerated development scenario, there will be a shortfall in available local workforce by 2021 as illustrated in Figure 3.16. Figure 3.17 compares the incremental growth in available local workforce and each of the Bromelton SDA development scenarios for Beaudesert, which also highlights a deficit in available local workforce to support the development of the Bromelton SDA. Consequently, it is evident that there is a shortage in available local workforce to support the development of the Bromelton SDA as well as local businesses within the Scenic Rim.

Figure 3.16: Incremental Growth in Number of Workers, Available Workforce v Bromelton SDA Development Scenario, Scenic Rim, 2021 to 2036



Source: Economic Associates Analysis, Figures 2.5 and 3.7

Figure 3.17: Incremental Growth in Number of Workers, Available Workforce v Bromelton SDA Development Scenario, Beaudesert



Source: Economic Analysis, Figures 2.5 and 3.11



Based on the incremental growth in available workforce in the Scenic Rim with the three development scenarios for Bromelton indicates a shortfall in workers of between -1,580 workers (based on available workforce) and -2,275 workers (based on persons employed in industrial sectors) to support the development of Bromelton from 2021 under the accelerated development scenario, a shortfall in workers of between -294 (based on persons employed in non-population serving sectors) and -683 work-

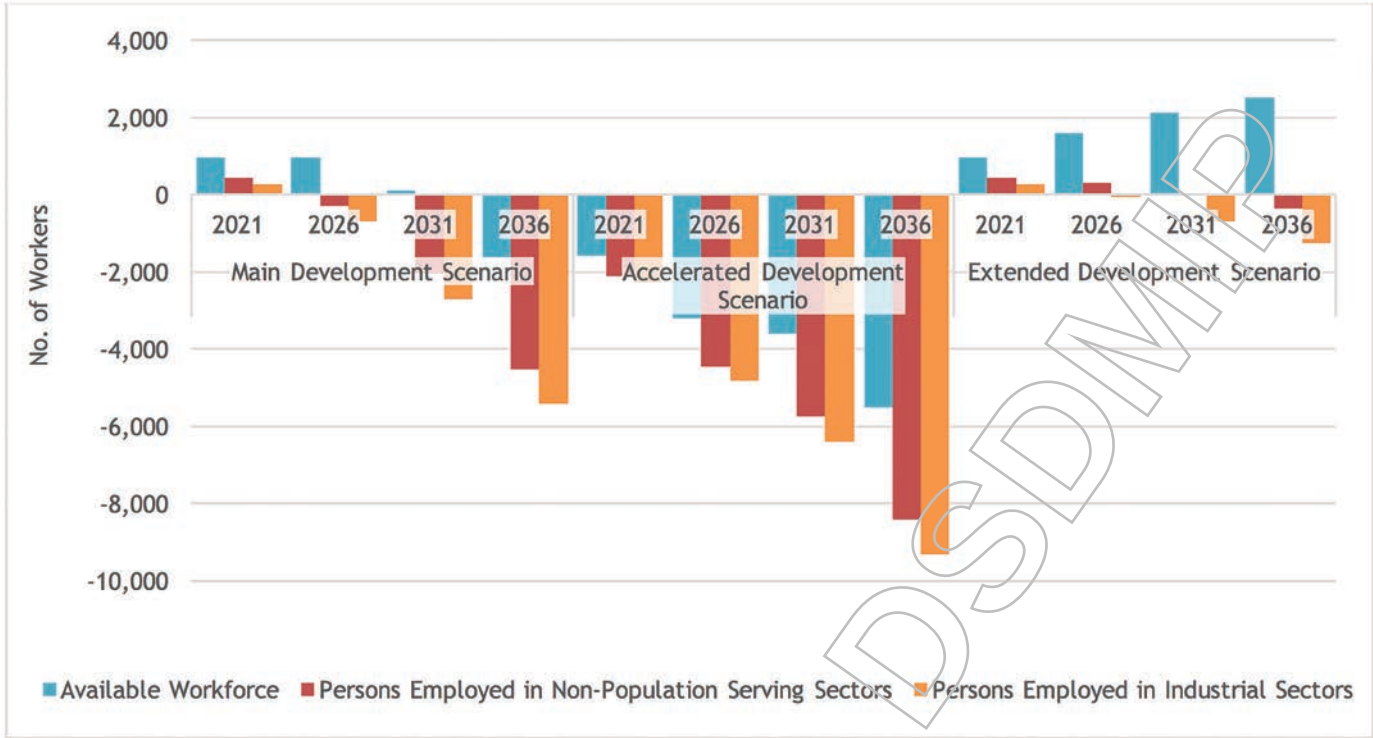
ers (based on persons employed in industrial sectors) in 2026 under the main development scenario and a shortfall of -65 workers (based on persons employed in industrial sectors) to support the development from 2026 under the extended development scenario as summarised in Table 3.1. Figure 3.18 illustrates the estimated shortfall in employment between 2021 and 2036 based on available workforce for the Scenic Rim.

Table 3.1: Estimated Employment Shortfall/Surplus, Available Workforce v Bromelton SDA Development Scenario, Scenic Rim, 2021 to 2036

	2016	2021	2026	2031	2036
Employment (No. of Workers)					
Available Workforce	13,674	14,640	15,964	17,591	18,931
Persons Employed in Non-Population Serving Sectors	6,153	6,588	7,184	7,916	8,519
Persons Employed in Industrial Sectors	3,829	4,099	4,470	4,925	5,301
Incremental Growth in Employment (No. of Workers)					
Available Workforce	-	966	2,290	3,917	5,257
Persons Employed in Non-Population Serving Sectors	-	435	1,030	1,763	2,366
Persons Employed in Industrial Sectors	-	270	641	1,097	1,472
Bromelton Employment by Development Scenario (No. of Workers)					
Main Development Scenario	0	0	1,324	3,790	6,871
Accelerated Development Scenario	172	2,718	5,644	7,674	10,954
Extended Development Scenario	0	0	706	1,793	2,729
Incremental Growth in Bromelton Employment (No. of Workers)					
Main Development Scenario	-	0	1,324	3,790	6,871
Accelerated Development Scenario	-	2,546	5,472	7,502	10,782
Extended Development Scenario	-	0	706	1,793	2,729
Employment Shortfall/Surplus (No. of Workers)					
		2021	2026	2031	2036
Main Development Scenario					
Available Workforce	-	966	966	127	-1,613
Persons Employed in Non-Population Serving Sectors	-	435	-294	-2,027	-4,505
Persons Employed in Industrial Sectors		270	-683	-2,693	-5,399
Accelerated Development Scenario					
Available Workforce	-	-1,580	-3,183	-3,585	-5,525
Persons Employed in Non-Population Serving Sectors	-	-2,111	-4,442	-5,739	-8,416
Persons Employed in Industrial Sectors		-2,275	-4,831	-6,405	-9,310
Extended Development Scenario					
Available Workforce	-	966	1,584	2,124	2,529
Persons Employed in Non-Population Serving Sectors	-	435	324	-30	-363
Persons Employed in Industrial Sectors	-	270	-65	-696	-1,256

Source: Economic Associates Analysis

Figure 3.18: Estimated Shortfall in Employment by Bromelton SDA Development Scenario, Scenic Rim



Source: Economic Associates Analysis, Table 3.1



As previously mentioned, Beaudesert could reasonably be expected to be the main source of available local workforce for the Bromelton SDA given its proximity. Based on the incremental growth in available workforce for Beaudesert with each of the development scenarios for the Bromelton SDA, suggests a shortfall of between -1,540 workers (available workforce) and -2,254 workers (persons employed in industrial sectors) in 2021 under the accelerated scenario, a shortfall of -293 workers (persons employed in non-population serving sectors) and -674 workers (persons employed in industrial sectors) by 2026 under the main scenario, and a shortfall of -56 workers (persons employed in the industrial sector) by 2026 under the extended scenario. Table 3.2 details the incremental growth of each workforce and development scenario, estimated shortfall in available workforce compared to

the employment yield of Bromelton based on the Beaudesert available workforce and is also illustrated in Figure 3.19.

Based on the projected working age population of Boonah and Beaudesert coupled with the anticipated long term employment generated by Bromelton (24,802 workers in the long term to 2064 based on the main scenario) it is apparent that the available local workforce of these communities (in particular Beaudesert) are insufficient to support the employment requirements of the Bromelton SDA. Hence, alternative sources of available workforce (i.e. located beyond the Scenic Rim) will need to be sought to attract skilled workers to the Scenic Rim to support the development of the Bromelton SDA as well as flow-on employment within Beaudesert, Boonah and the broader Scenic Rim.

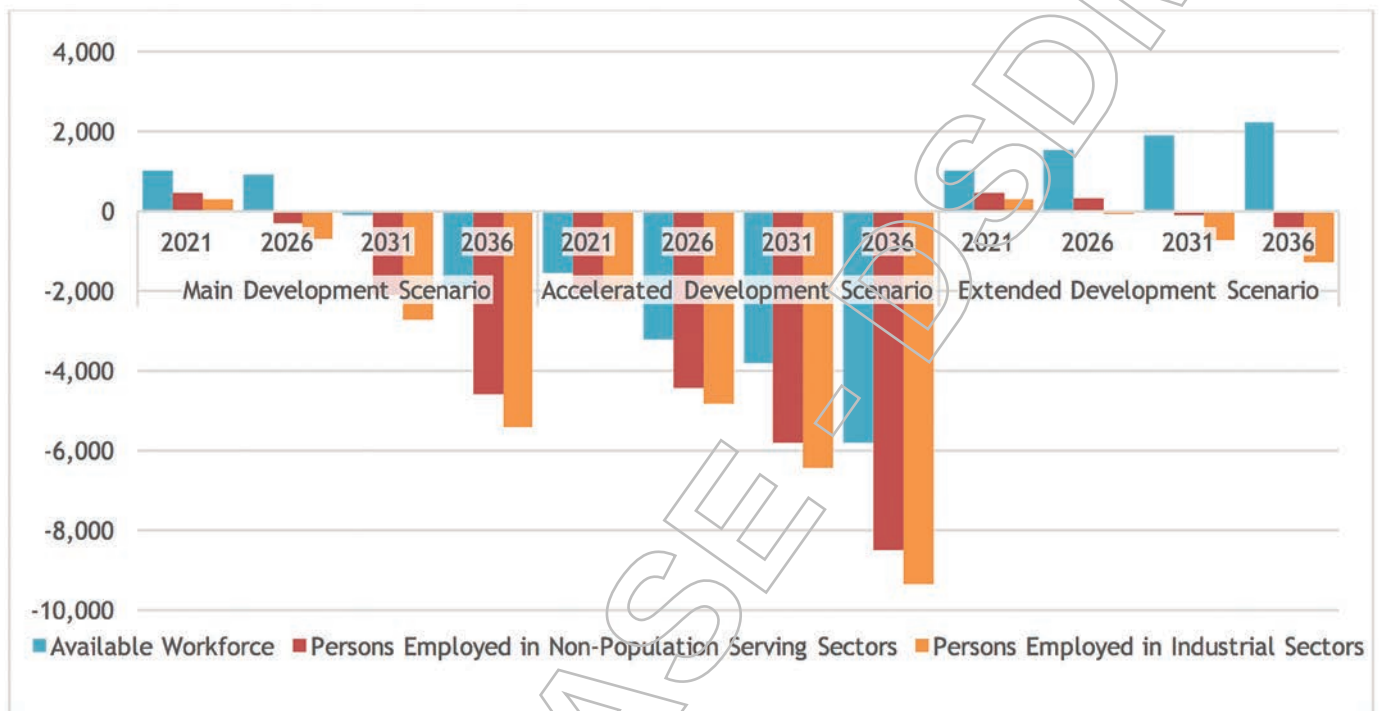
Table 3.2: Estimated Employment Shortfall/Surplus, Available Workforce v Bromelton SDA Development Scenario, Beaudesert, 2021 to 2036

	2016	2021	2026	2031	2036
Employment (No. of Workers)					
Available Workforce	4,726	5,732	6,967	8,415	9,692
Persons Employed in Non-Population Serving Sectors	2,174	2,637	3,205	3,871	4,459
Persons Employed in Industrial Sectors	1,371	1,662	2,020	2,440	2,811
Incremental Growth in Employment (No. of Workers)					
Available Workforce	-	1,006	2,241	3,689	4,966
Persons Employed in Non-Population Serving Sectors	-	463	1,031	1,697	2,284
Persons Employed in Industrial Sectors	-	292	650	1,070	1,440
Bromelton Employment by Development Scenario (No. of Workers)					
Main Development Scenario	0	0	1,324	3,790	6,871
Accelerated Development Scenario	172	2,718	5,644	7,674	10,954
Extended Development Scenario	0	0	706	1,793	2,729
Incremental Growth in Bromelton Employment (No. of Workers)					
Main Development Scenario	-	0	1,324	3,790	6,871
Accelerated Development Scenario	-	2,546	5,472	7,502	10,782
Extended Development Scenario	-	0	706	1,793	2,729
Employment Shortfall/Surplus (No. of Workers)					
Main Development Scenario					
Available Workforce	-	1,006	917	-101	-1,905
Persons Employed in Non-Population Serving Sectors	-	463	-293	-2,093	-4,586
Persons Employed in Industrial Sectors	-	292	-674	-2,720	-5,431
Accelerated Development Scenario					
Available Workforce	-	-1,540	-3,232	-3,813	-5,816

Persons Employed in Non-Population Serving Sectors	-	-2,083	-4,442	-5,805	-8,498
Persons Employed in Industrial Sectors	-	-2,254	-4,823	-6,432	-9,342
Extended Development Scenario					
Available Workforce	-	1,006	1,534	1,896	2,238
Persons Employed in Non-Population Serving Sectors	-	463	325	-96	-444
Persons Employed in Industrial Sectors	-	292	-56	-723	-1,288

Source: Economic Associates Analysis

Figure 3.19: Estimated Shortfall in Employment by Bromelton SDA Development Scenario, Beaudesert



4. ALTERNATIVE SOURCE OF AVAILABLE WORKFORCE

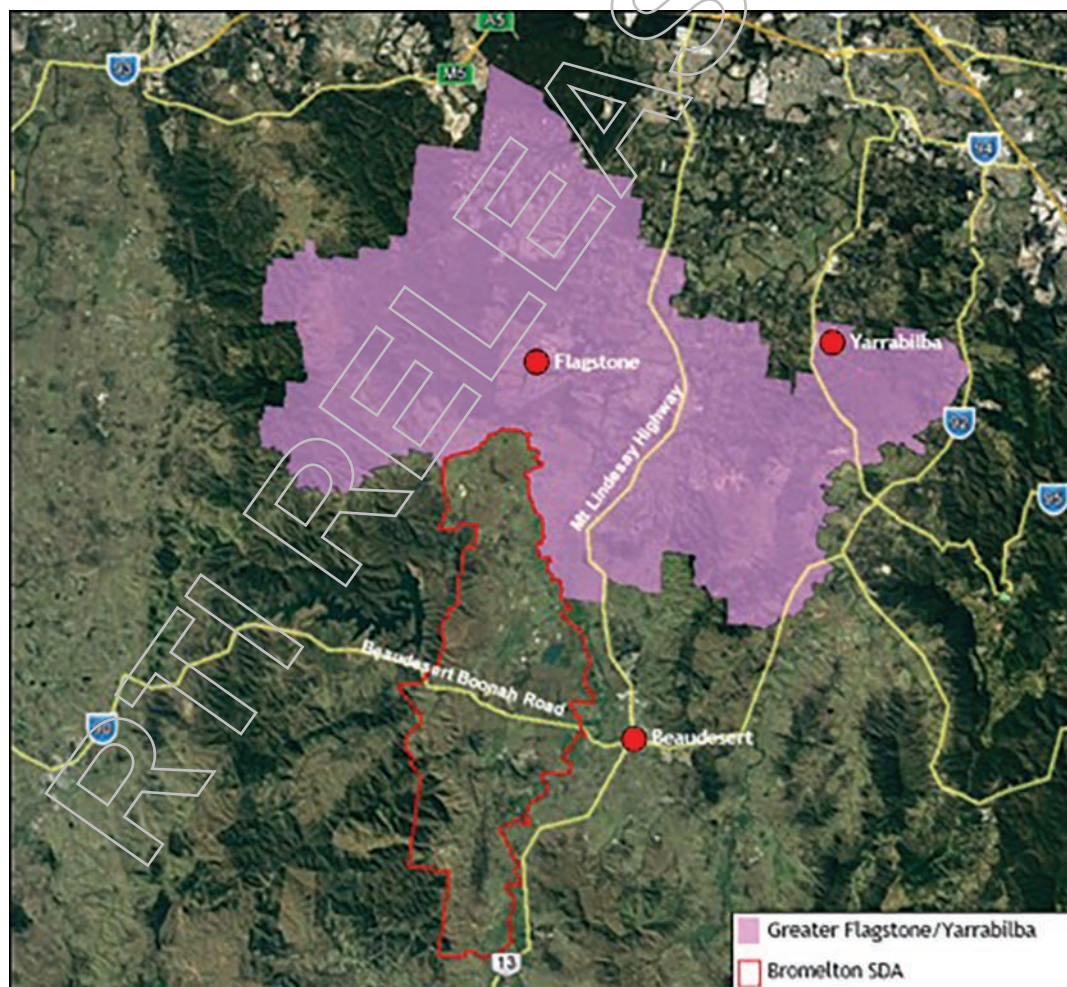
4.1 GREATER FLAGSTONE/YARRABILBA

With shortfalls anticipated (both in skills and number of workers) within the local workforce to support the long term development of Bromelton, alternative sources of available workforce are likely to be required. Greater Flagstone and Yarrabilba represent the most proximate alternative workforce to supplement the available local workforce. These areas are anticipated to achieve significant population growth underpinned by the Greater Flagstone Priority Development Area (PDA) and Yarrabilba. The Greater Flagstone PDA comprises 7,889 hectares and is anticipated to yield approximately 50,000 dwellings with a population of approximately 120,000 persons once fully developed. Yarra-

bilba is a master planned community covering 2,029 hectares and is expected to yield over 17,000 dwellings with a population of approximately 45,000 persons. As the development of both Greater Flagstone and Yarrabilba are both within their infancy, it is pertinent to note that the demographic characteristics of this community are likely to evolve as these communities continue to develop.

In determining the appropriateness of Greater Flagstone/Yarrabilba as an alternative source of available workforce, an examination of the demographic characteristics of this community between 2001 and 2011 has been undertaken (with Table B.1 summarising the key demographic characteristics). For the purposes of this analysis, the Greater Flagstone/Yarrabilba community is defined by the Greenbank (which encompasses part of the Greater Flagstone PDA) and Jimboomba SA2s (which encompasses the Yarrabilba PDA and part of the Greater Flagstone PDA) as illustrated in Figure 4.1.

Figure 4.1: Defined Greater Flagstone/Yarrabilba Community



Source: Google Earth

The following provides an overview of the population projections and demographic characteristics of the Greater Flagstone/Yarrabilba¹⁴ community based on the ABS Census of Population and Housing and QGSO projections. The population of Greater Flagstone/Yarrabilba increased from 26,171 persons in 2006 to 36,863 persons in 2016 (an average increase of 3.5% per annum), underpinned by the development of the Greater Flagstone PDA and Yarrabilba residential community being developed by Lend Lease. The Greater Flagstone/Yarrabilba community is anticipated to continue to achieve strong population growth increasing to 135,783 persons by 2036 (an average increase of 6.7% per annum between 2016 and 2036).

The working age population of the Greater Flagstone/Yarrabilba community also achieved strong growth between 2006 and 2016, increasing from 17,715 persons to 24,305 persons (an average growth rate of 3.2% per annum). By 2036, the working age population is projected to increase to 86,546 persons as summarised in Table 4.1. The retiree population of the Greater Flagstone/Yarrabilba is anticipated to significantly increase between 2016 and 2036 from 3,190 persons to 18,127 persons.

¹⁴ The Greater Flagstone/Yarrabilba community is defined by the Greenbank SA2 (which encompasses the Greater Flagstone PDA) and the Jimboomba SA2 (which encompasses the Yarrabilba PDA and parts of the Greater Flagstone PDA). To allow concordance with population data, the population estimates and demographic profile for the individual Greater Flagstone and Yarrabilba PDA has been undertaken. It is noted that the defined Greater Flagstone/Yarrabilba community includes the rural residential communities surrounding Jimboomba.

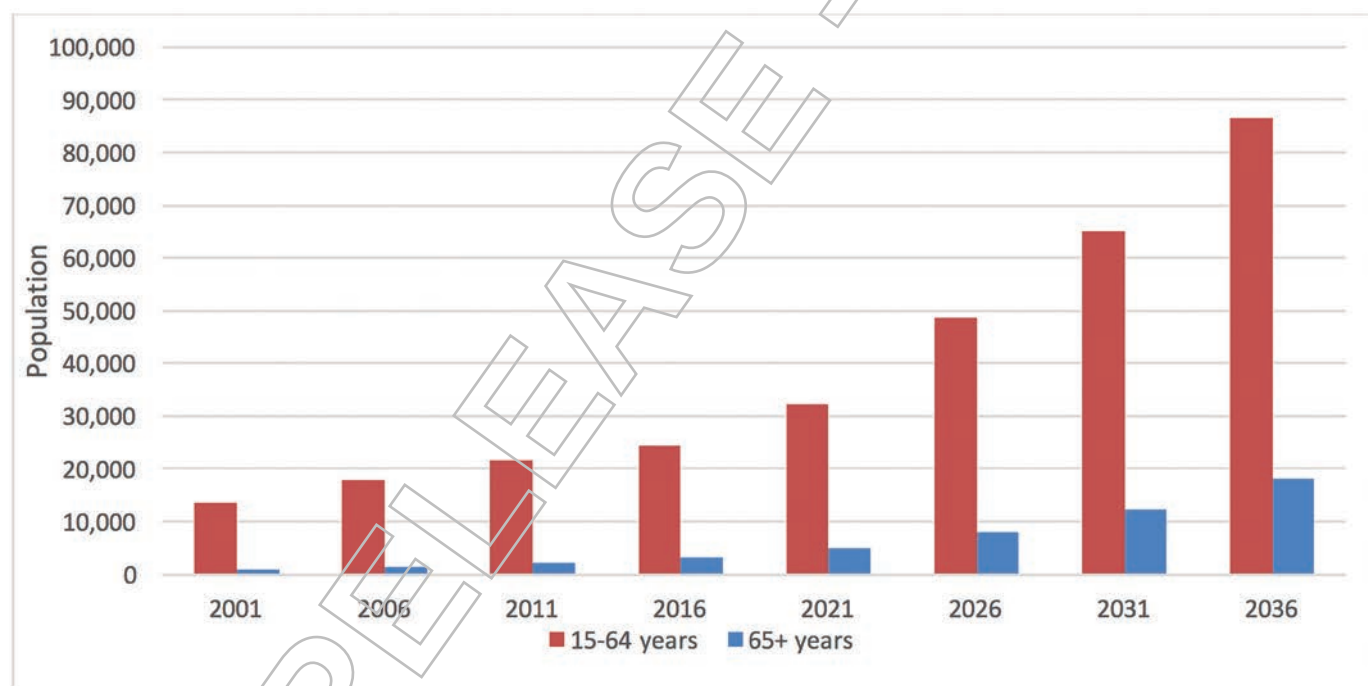


Table 4.1: Population Estimates, Greater Flagstone/Yarrabilba, 2006 to 2036

	2006	2011	2016	2021	2026	2031	2036	2006-36 % growth p.a
Total Population	26,171	32,308	36,863	49,352	74,911	100,920	135,783	5.6%
15-64 years (No.)	17,715	21,695	24,305	32,205	48,697	64,970	86,546	5.4%
15-64 years (% of Total Population)	67.7%	67.2%	65.9%	65.3%	65.0%	64.4%	63.7%	-
65+ years (No.)	1,274	2,116	3,190	4,880	8,036	12,165	18,127	9.3%
65+ years (% of Total Population)	4.9%	6.5%	8.7%	9.9%	10.7%	12.1%	13.3%	-

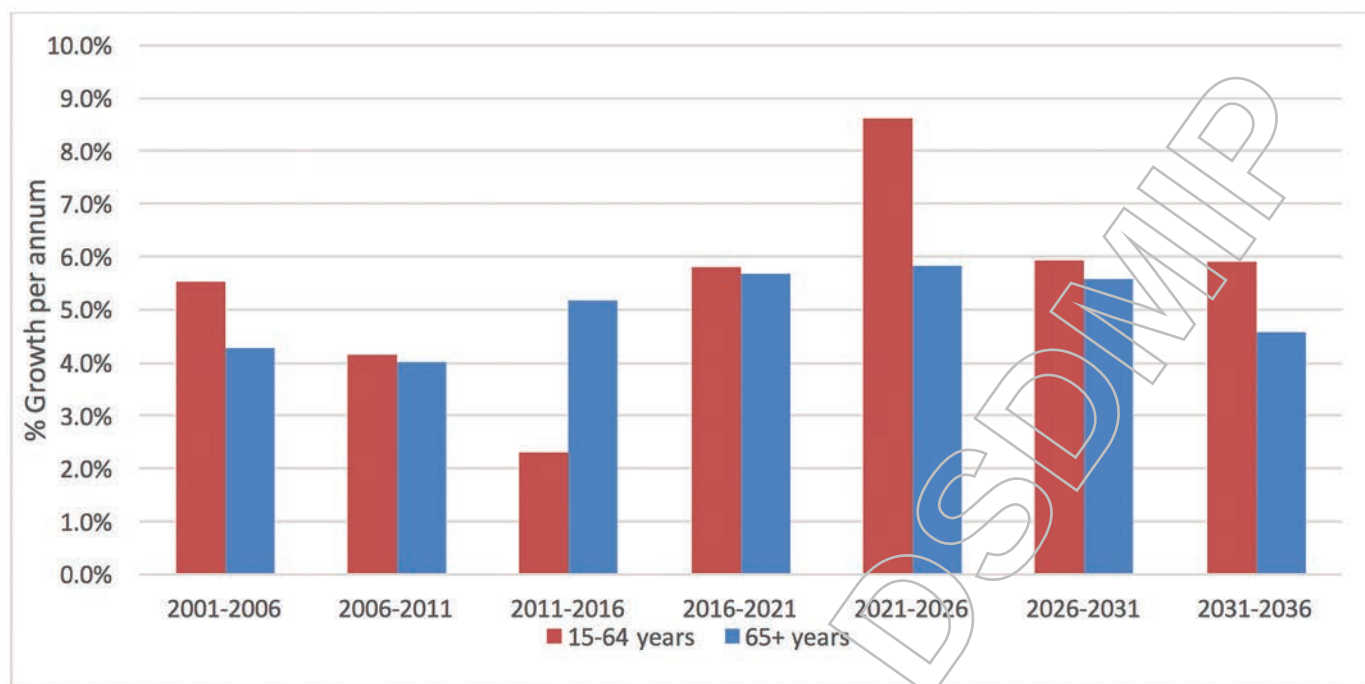
Source: ABS, Queensland Government Statisticians Office (2015), Economic Associates Analysis

Figure 4.2 compares the working age population with the retiree population for the Greater Flagstone/Yarrabilba community between 2001 and 2036. Figure 4.3 compares the average population growth per annum for working age and retiree population of the Greater Flagstone/Yarrabilba community between 2001 and 2036.

Figure 4.2: Working Age Population v Retiree Population, Greater Flagstone/Yarrabilba, 2001 to 2036

Source: ABS, Queensland Government Statisticians Office (2015), Economic Associates Analysis

Figure 4.3: Working Age Population v Retiree Population, Average growth per annum, Greater Flagstone/Yarrabilba 2001 to 2036



Source: ABS, Queensland Government Statisticians Office (2015), Economic Associates Analysis

To estimate the size of available workforce derived from Greater Flagstone/Yarrabilba, three workforce scenarios were developed from the QGSO projections as follows:

- Total available workforce: this scenario assumes that the total available workforce (i.e. total employment multiplied by labour force participation rate)¹⁵ equates to 65% of the total working age population;
- Workforce in non-population serving sectors: this scenario assumes on average 50% of the available workforce is employed in non-population serving sectors¹⁶; and

- Workforce in industrial sectors: assumes on average 42% of the available workforce is employed in industrial sectors¹⁷.

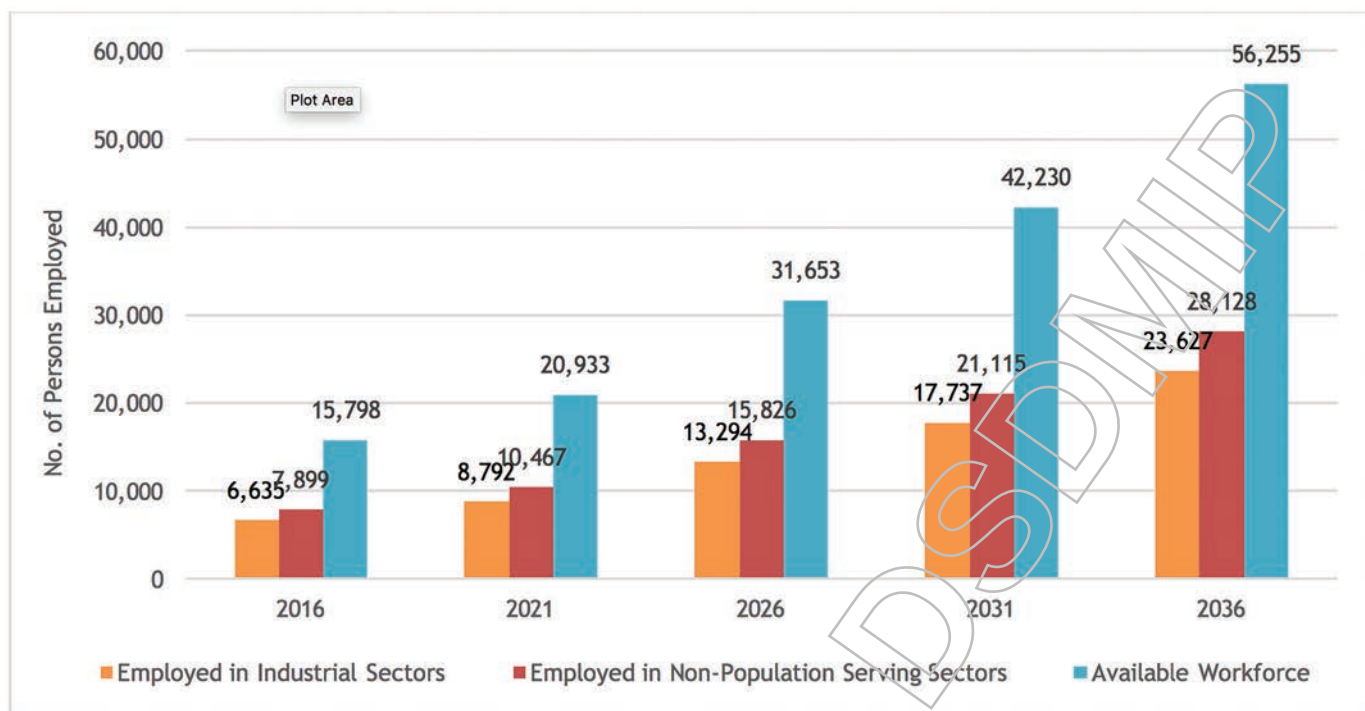
Based on the above workforce scenarios, total available workforce in Greater Flagstone/Yarrabilba is projected to increase (derived from the QGSO projections) from 15,798 persons in 2015 to 56,255 persons in 2036. Persons employed in non-population serving sectors is anticipated to increase from 7,899 persons to 28,128 persons between 2016 and 2036, whilst persons employed in industrial sectors is expected to increase from 6,635 persons to 23,627 persons between 2016 and 2036. Figure 4.4 illustrates the available workforce for Greater Flagstone/Yarrabilba between 2016 and 2036. Figure 4.5 illustrates the incremental growth in persons employed between 2021 and 2036 for Greater Flagstone/Yarrabilba.

¹⁵ Based on ABS Census data, total employment in Greater Flagstone/Yarrabilba was 93.0% in 2001, 96.4% in 2006 and 94.6% in 2011. Labour force participation rates in Greater Flagstone/Yarrabilba was 68.5% in 2001, 68.5% in 2006 and 70.7% in 2011. Based on the above rates, the average total available workforce was 65.5% (i.e. total employment multiplied by labour force participation rate). For the purposes of this analysis, 65% has been adopted.

¹⁶ Average based on the 2001, 2006 and 2011 Census results, which indicate the proportion of persons employed in non-population serving sectors (including agriculture, forestry and fishing; mining; manufacturing; construction; wholesale trade; transport, postal and warehousing; professional, scientific and technical services; and administrative and support services) was 52.0% in 2001, 51.1% in 2006 and 49.4% in 2011, equating to an average of 50.8%. For the purposes of this analysis 50% has been adopted.

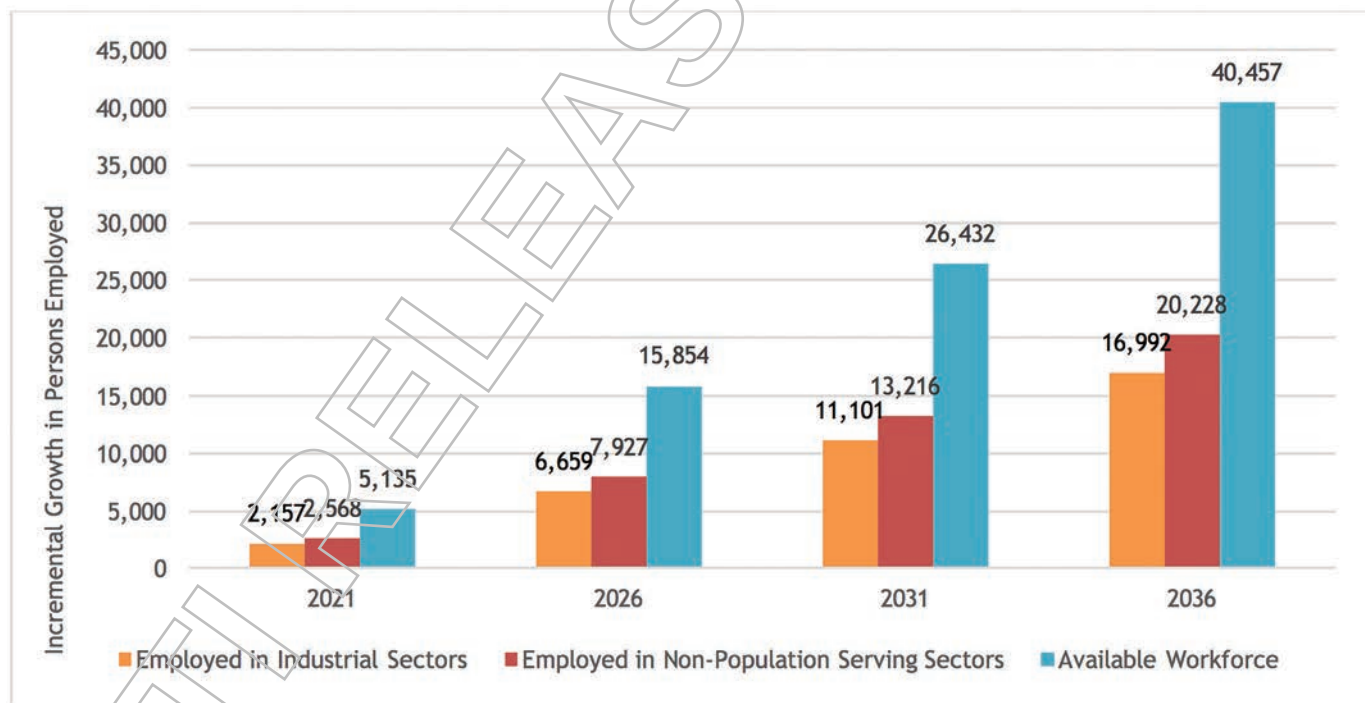
¹⁷ Average based on the 2001, 2006 and 2011 Census results, which indicate the proportion of persons employed in industrial sectors (including mining, manufacturing, construction, wholesale trade and transport, postal and warehousing) was 42.5% in 2001, 43.2% in 2006, and 40.9% in 2011, equating to an average of 42.2%. For the purposes of this analysis 42% has been adopted.

Figure 4.4: Total Available Workforce v Persons Employed in Non-Population Serving Sectors v Persons Employed in Industrial Sectors, Greater Flagstone/Yarrabilba, 2016 to 2036



Source: Economic Associates Analysis

Figure 4.5: Incremental Growth in Employed Persons, Greater Flagstone/Yarrabilba, 2021 to 2036

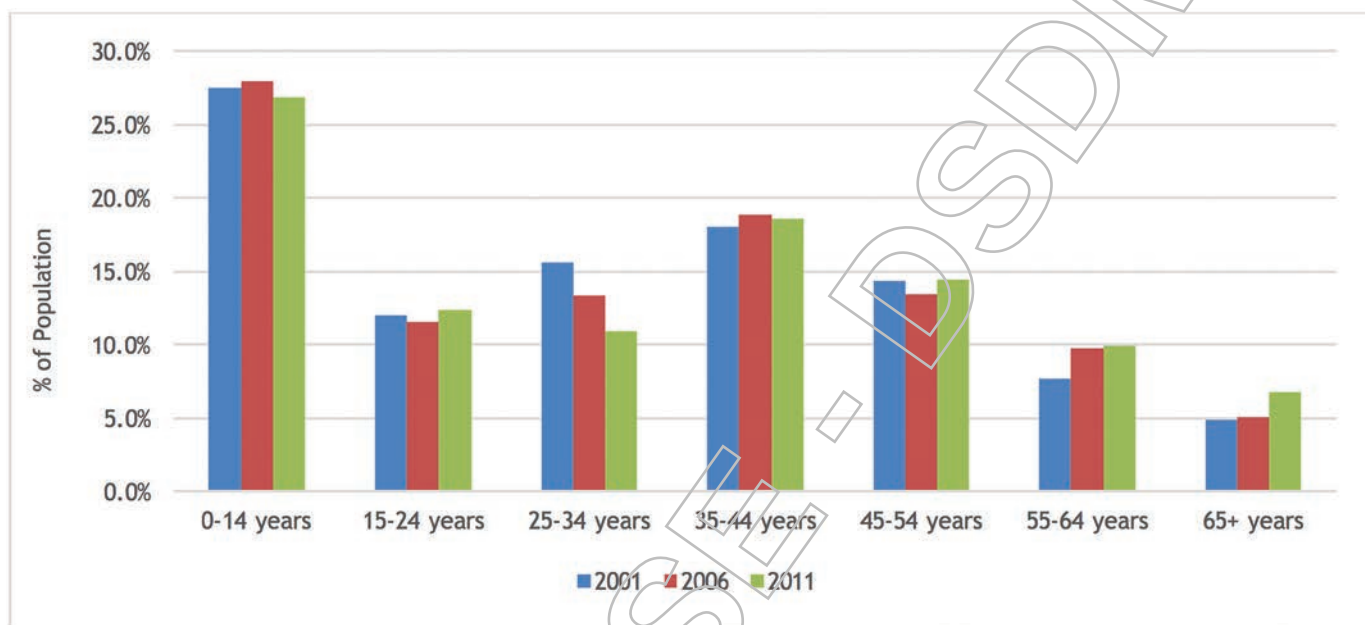


Source: Economic Associates Analysis

The Greater Flagstone/Yarrabilba community is generally characterised by a younger demographic particularly compared to Boonah and Beaudesert, with the average age of residents increasing from 31.4 years in 2001 to 33.2 years in 2011. The proportion of persons aged 65 years and older increased from 4.9% to 6.8%

between 2001 and 2011, whilst the proportion of persons aged 25 to 34 years decreased from 15.6% in 2001 to 11.0% in 2011. Figure 4.6 illustrates the age profile for the Greater Flagstone/Yarrabilba community between the 2001 and 2011 censuses.

Figure 4.6: Age Profile by Age Cohort Greater Flagstone/Yarrabilba, 2001 to 2011



Source: ABS Census of Population and Housing, Economic Associates Analysis

The proportion of residents attaining a non-school qualification increased between 2001 and 2011 from 30.6% to 41.5%. Residents with a diploma/certificated accounted for 25.0% in 2001 increasing to 32.9% in 2011, reflecting an increasing prevalence of a skilled workforce.

The Greater Flagstone/Yarrabilba community exhibited high workforce participation rates between 2001 and 2011 increasing from 68.5% to 70.7%, reflective of the higher proportion of persons within the working age cohorts (i.e. persons aged 15 to 64 years old).

Between 2001 and 2011, manufacturing, construction and transport, postal and warehousing have consistently been major industry sectors of employment of the Greater Flagstone/Yarrabilba community. The development of the

Bromelton SDA is likely to generate significant demand for skilled workers in such industry sectors that could be sourced from the Greater Flagstone/Yarrabilba community as a supplementary source to available local workforce of Beaudesert.

The demographic characteristics of the Greater Flagstone/Yarrabilba community is likely to continue to evolve with the long term development of the Greater Flagstone PDA and Yarrabilba communities. In order to obtain an understanding of the potential future demographic characteristics of this community, a comparative analysis of other exemplar Greenfield communities has been undertaken as discussed in the following section 4.2.

4.2 COMPARATIVE DEMOGRAPHIC ANALYSIS

The Greater Flagstone/Yarrabilba community is anticipated to accommodate significant population growth underpinned by the Greenfield development of the Greater Flagstone PDA and Yarrabilba. The Greater Flagstone/Yarrabilba community represents a logical alternative source of available workforce to supplement anticipated workforce shortages within the Scenic Rim (and in particular Beaudesert) to support the growth and development of Bromelton. Hence, it is pertinent to obtain an understanding of the likely future demographic characteristics of the Greater Flagstone/Yarrabilba community as it continues to develop. Other major Greenfield communities across South East Queensland have been examined to provide an overview of the indicative demographic composition of the Greater Flagstone community in the long term. For the purpose of this analysis, exemplar locations examined include:

- Greater Springfield: comprising Springfield, Springfield Lakes, and Bellbird Park–Brookwater SA2s (illustrated in Figure 4.7);
- Northern Gold Coast: comprising Ormeau – Yatala, Pimpama, Upper Coomera–Willow Vale, and Coomera SA2s (illustrated in Figure 4.8); and
- North Lakes: comprising the North Lakes – Mango Hill SA2 (illustrated in Figure 4.9).

These communities provide examples of large Greenfield developments considered compara-

ble to the development of the Greater Flagstone/Yarrabilba community. Each of these communities also service significant employment nodes within proximity to their locations. Table B.2 in Appendix B details the demographic characteristics of each of these communities with a brief summary provided below.

GREATER SPRINGFIELD

Greater Springfield is generally characterised by a young skilled blue collar workforce with high education attainment levels. Key demographic characteristics include:

- the average age of Greater Springfield residents increased from 29.4 years to 29.6 years between 2001 and 2011;
- Greater Springfield exhibited a higher incidence of persons aged 25 to 34 years increasing from 17.7% to 19.1% between 2001 and 2011, whilst the proportion of persons aged 65 years and older increased from 3.5% to 3.7% over the same period;
- Education attainment levels within Greater Springfield have increased between 2001 and 2011, with almost half (47.5%) of the resident workforce attaining a non-school qualification as of 2011 (cf. 32.3% in 2001);
- The proportion of those with a diploma/certificate has increased from 24.7% in 2001 to 31.4% in 2011; and
- Manufacturing, construction and transport, postal and warehousing are key industry sectors of employment of the Greater Springfield community.

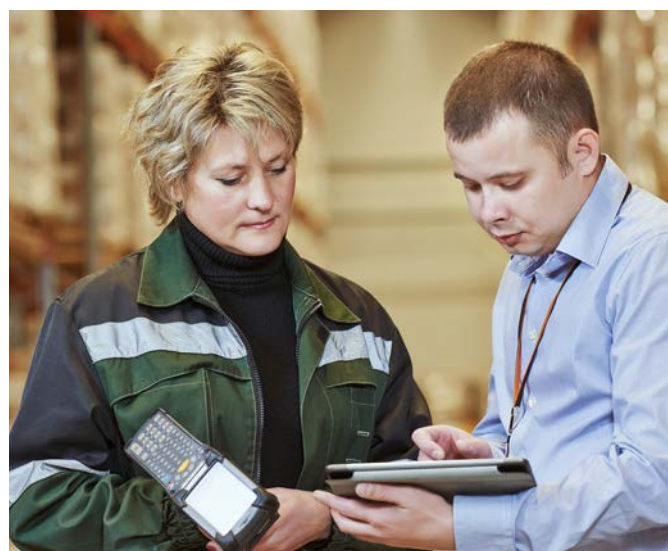
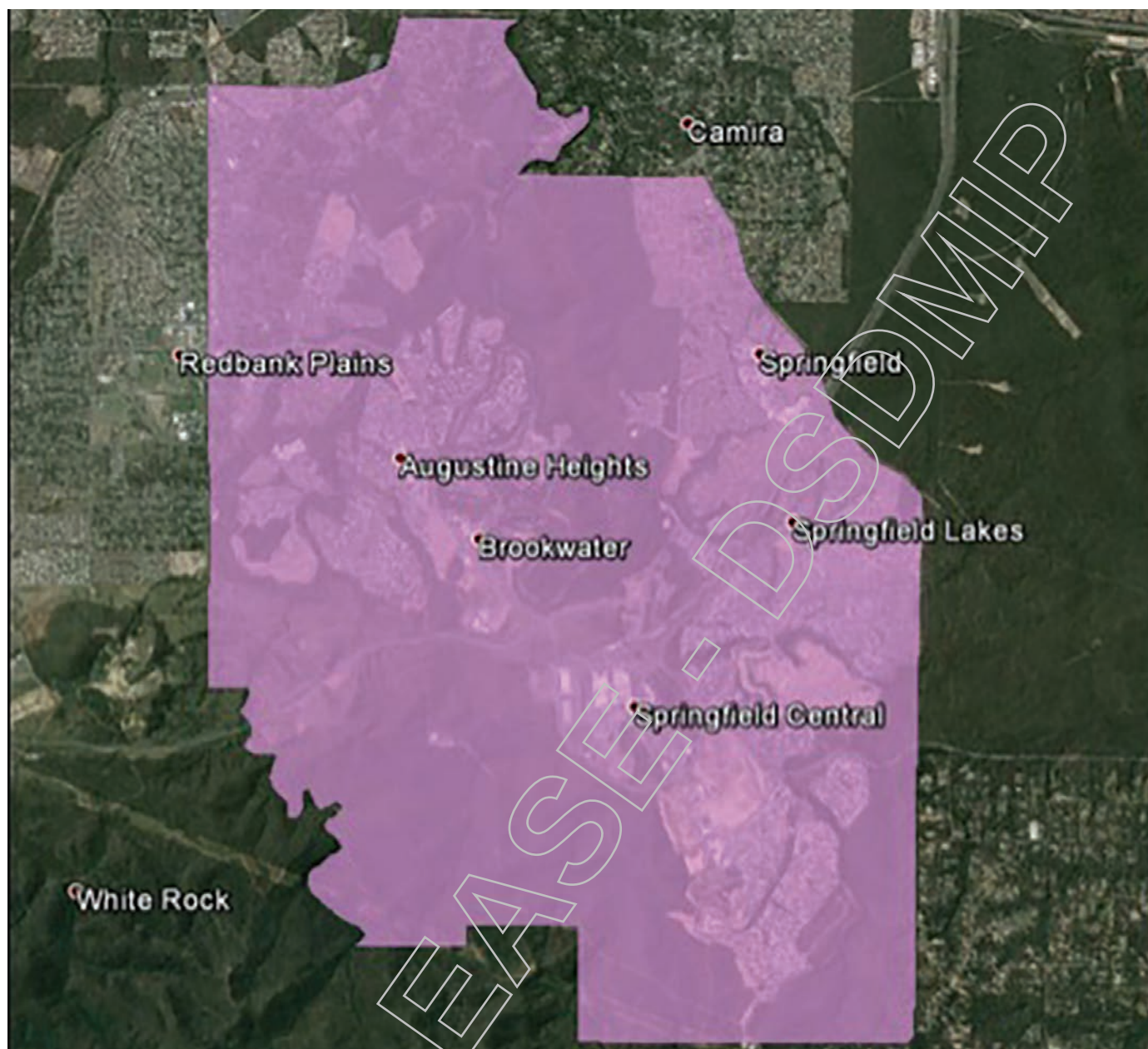


Figure 4.7: Defined Greater Springfield



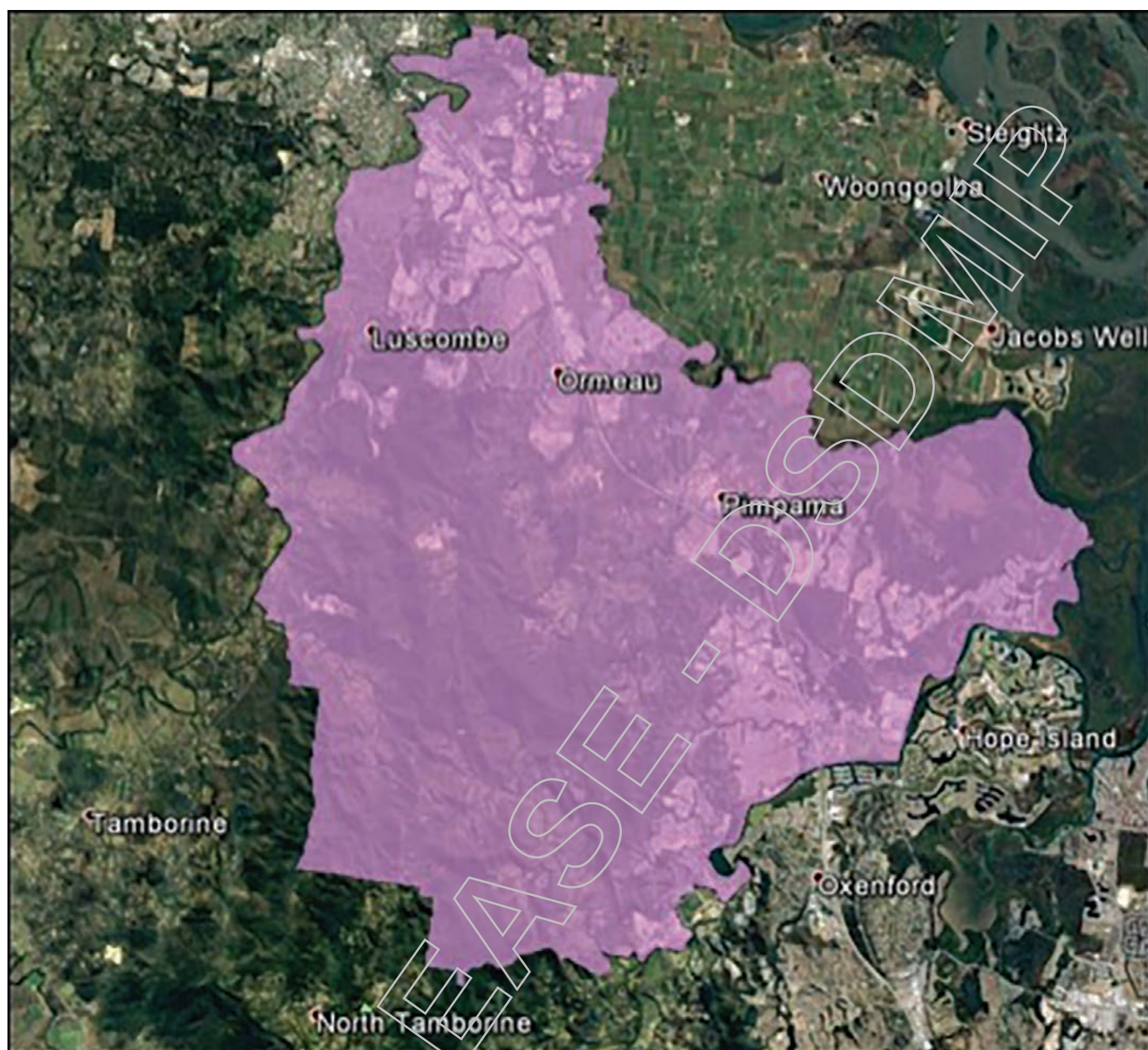
Source: Google Earth

NORTHERN GOLD COAST

The Northern Gold Coast includes extensive tracts of Greenfield land including Pimpama and Coomera, which is anticipated to achieve significant population growth. The Northern Gold Coast exhibited an older demographic in comparison to the other exemplar locations, albeit this is reflective of more established parts of the corridor, with areas such as Pimpama likely to exhibit a slightly younger demographic. Key characteristics noted are as follows:

- The proportion of persons aged 25 to 34 years old decreased slightly between 2001 and 2011 from 17.1% to 16.9%, whilst the proportion of persons aged 65 years and older increased slightly from 5.6% to 6.2% between 2001 and 2011.
- The average of residents within the Northern Gold Coast increased from 35 years to 36.2 years between 2001 and 2011.
- The North Gold Coast exhibited high education attainment levels with the proportion of residents achieving a non-school qualification increasing from 33.1% in 2001 to 45.6% in 2011. The proportion of persons with a diploma/certificate also increased between 2001 and 2011 from 25.6% to 33.6%.
- Similar to the other exemplar locations, manufacturing, construction and transport, postal and warehousing are key industry sectors of employment for the North Gold Coast corridor, reflective of this community's connectivity to the Yatala Enterprise Area.

Figure 4.8: Defined Northern Gold Coast



Source: Google Earth

NORTH LAKES

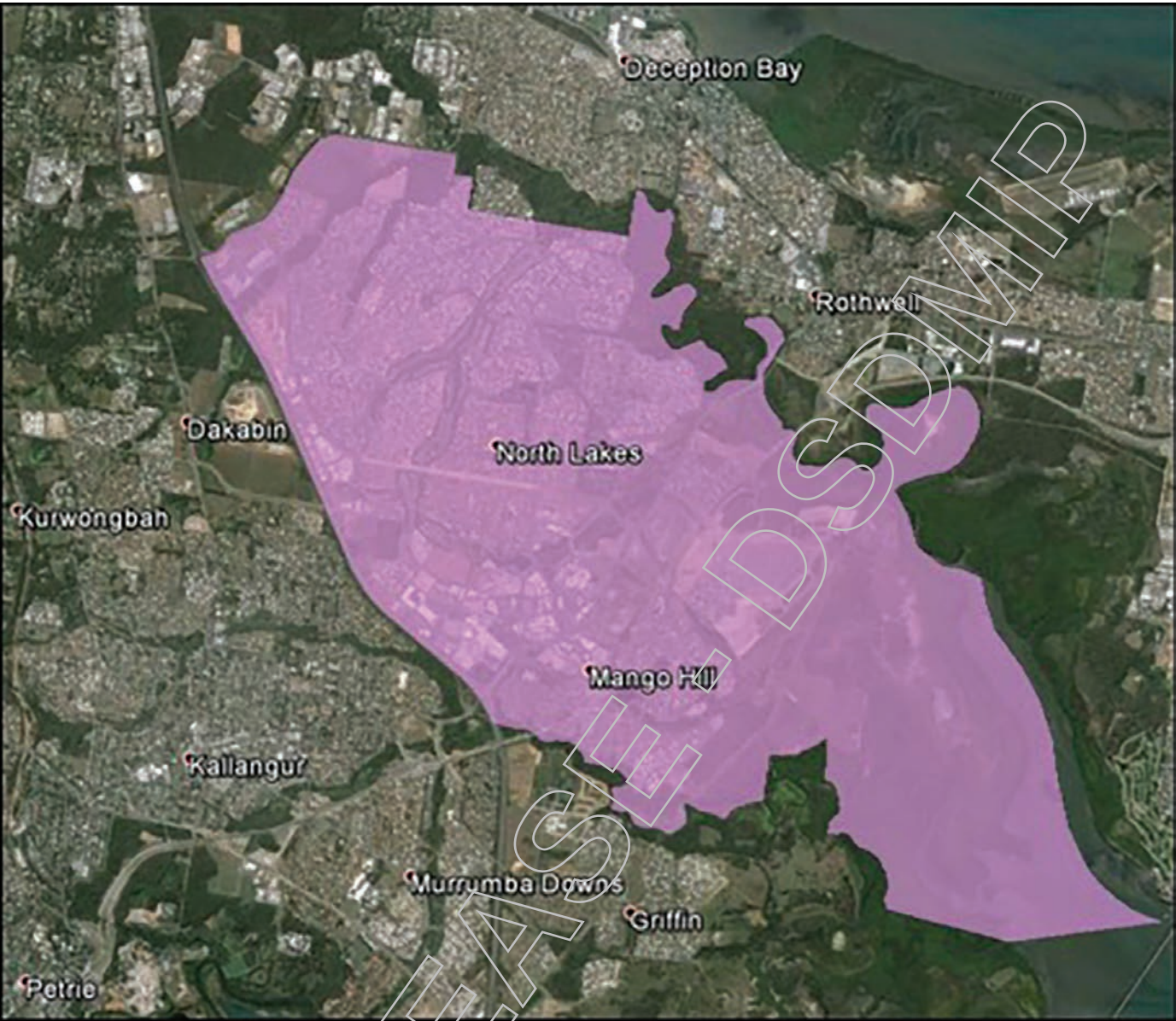
North Lakes is characterised by a younger demographic reflective of the intended master plan development of this Greenfield location. Key characteristics of North Lakes include:

- a high incidence of children aged 0 to 14 years (increasing from 39.0% in 2001 to 31.1% in 2011);
- The proportion of persons aged 65 years and older in North Lakes increased from 1.9% in 2001 to 3.4% in 2011, with the average age of North Lakes residents increasing from 28.7 years to 29 years between 2001

and 2011;

- The North Lakes community is well educated with over half (56.7%) of the community attaining a non-school qualification as of 2011. In 2011, 19.6% of North Lakes residents held a Bachelor degree or higher, with 37.2% attaining a diploma/certificate; and
- With the exception of retail trade and health care and social assistance, the manufacturing, construction and transport, postal and warehousing are dominant industry sectors of employment of the North Lakes community.

Figure 4.9: Defined North Lakes



Source: Google Earth



4.3 IMPLICATIONS FOR THE BROMELTON SDA AND THE SCENIC RIM

Bromelton is a long term development that is intended to become a significant industrial node not only for the Scenic Rim but the broader South East Queensland. Hence, it is pertinent to ensure that Bromelton has access to a suitable pool of skilled workers to support not only the long term development of Bromelton but the local businesses of the Scenic Rim (in particular Beaudesert). A review of the demographic characteristics of Beaudesert, Boonah and the Scenic Rim depicts the prevalence of an older demographic, with a high proportion of persons aged 65 years and older, lower workforce participation rates and lower educational attainment levels, which is anticipated by QGSO to continue in the long term. In addition the proportion of the working age population (i.e. persons aged 15-64 years) is projected to continue to de-

crease over the next 20 years (accounting for 55.6% Beaudesert, 51.7% Boonah and 54.3% Scenic Rim in 2036). Based on our analysis, it is apparent that the available local workforce is insufficient (both in terms of skills and number of workers) to support the long term development of Bromelton as a significant industrial node. Consequently, alternative sources of available workforce might be required to supplement the anticipated workforce shortages, particularly if Beaudesert does not change in response to rising labour demand at Bromelton. Greater Flagstone and Yarrabilba represents the most proximate and logical alternative.

Table 4.2 compares the working age population of Scenic Rim, Beaudesert and Boonah to Greater Flagstone/Yarrabilba and other Greenfield locations similar to Greater Flagstone/Yarrabilba at 2016 and 2036. Based on this comparison, the Scenic Rim, Beaudesert.

Table 4.2: Working Age Population Comparison, 2016 and 2036

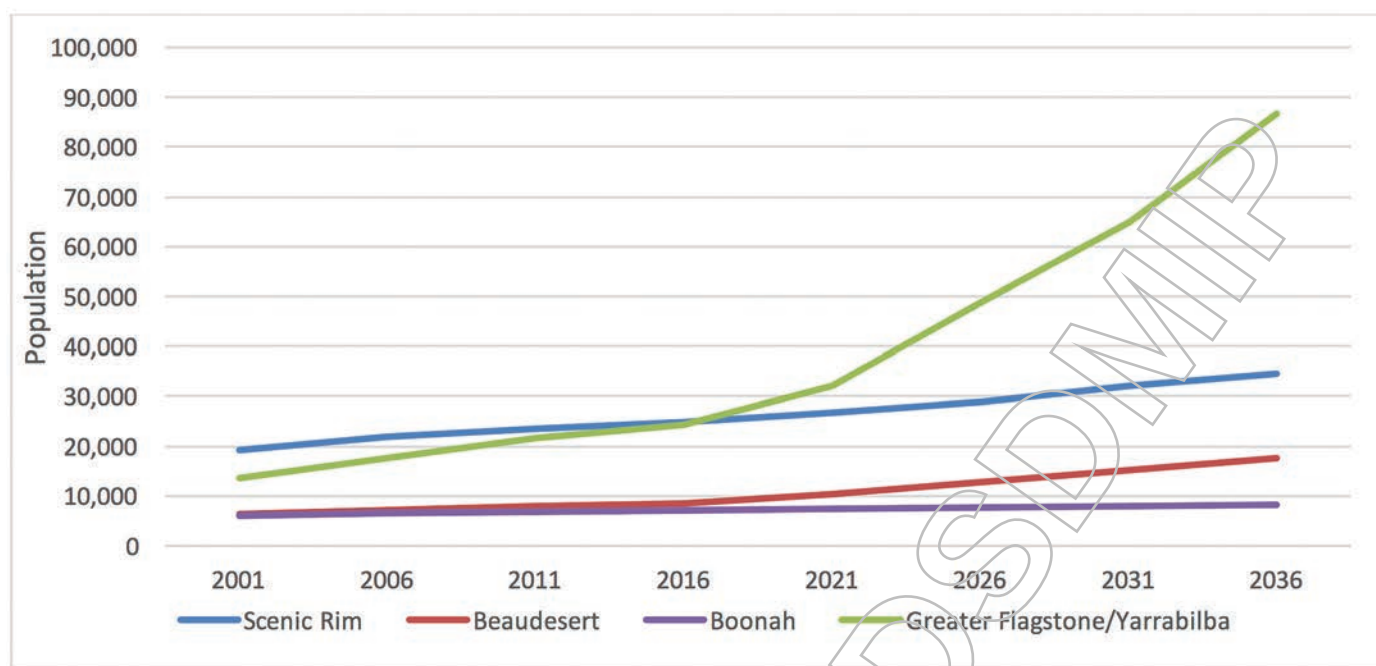
Location	Total Population (No.)			Working Age Population 15 – 64 years (No.)			Working Age Population as a % of the Total Population	
	2016	2036	% growth 2016-36	2016	2036	% growth 2016-36	2016	2036
Scenic Rim	41,014	63,396	2.2%	24,862	34,421	1.6%	64.7%	54.3%
Beaudesert	14,305	31,669	4.1%	8,593	17,623	3.7%	45.2%	55.6%
Boonah	12,020	15,777	1.4%	7,164	8,158	0.7%	76.2%	51.7%
Greater Flagstone/ Yarrabilba	36,863	135,783	6.7%	24,305	86,546	6.6%	27.1%	63.7%
Greater Springfield	33,892	99,823	5.5%	23,412	66,798	5.4%	34.0%	66.9%
Northern Gold Coast	70,620	157,178	4.1%	46,790	101,867	4.0%	44.9%	64.8%
North Lakes	30,045	46,002	2.2%	19,226	28,017	1.9%	65.3%	60.9%

Source: Queensland Government Statisticians Office (2015), Economic Associates Analysis

The working age population of the Greater Flagstone/Yarrabilba community is anticipated to experience significant population growth particularly in comparison to the Scenic Rim, Beaudesert and Boonah as illustrated in Figures 4.10 and 4.11. Figure 4.10 compares the working age population of the Scenic Rim, Beaudesert and

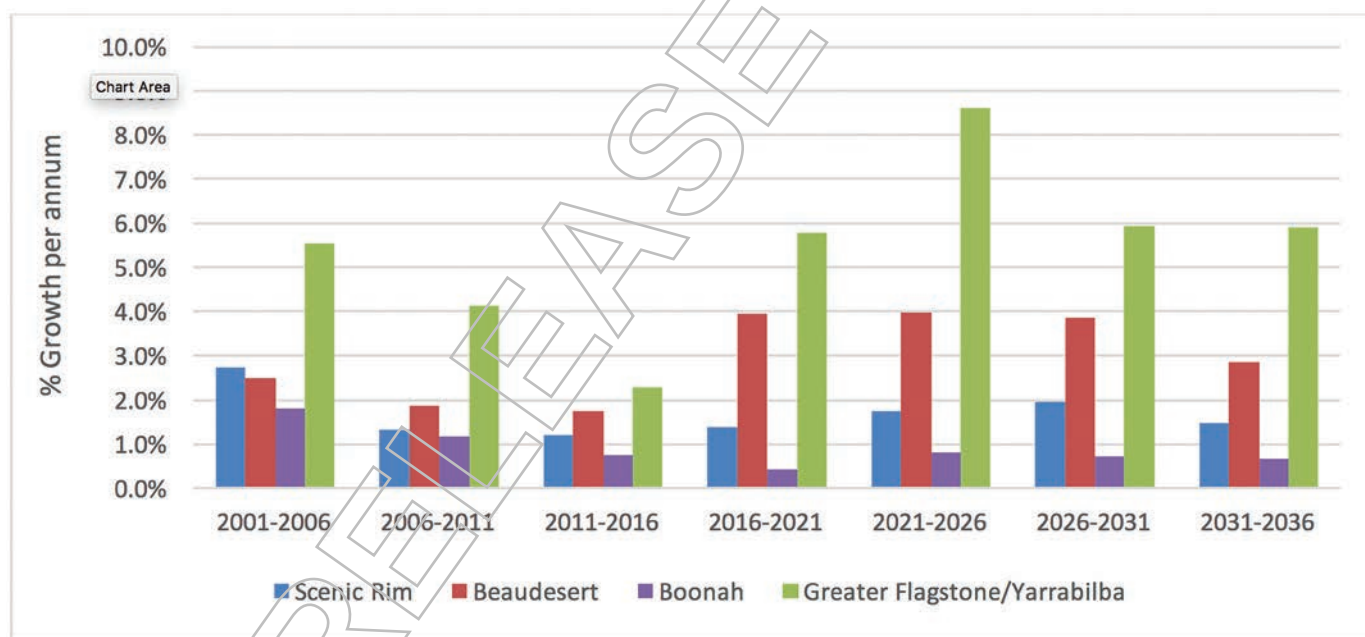
Boonah to the proximate Greater Flagstone/Yarrabilba community between 2001 and 2036. Figure 4.11 compares the average growth rate per annum of the working age population of the Greater Flagstone/Yarrabilba community compared to the Scenic Rim, Beaudesert and Boonah.

Figure 4.10: Working Age Population Comparison, 2001 to 2036



Source: ABS, Queensland Government Statisticians Office (2015), Economic Associates Analysis

Figure 4.11: Working Age Population Comparison, Average growth per annum

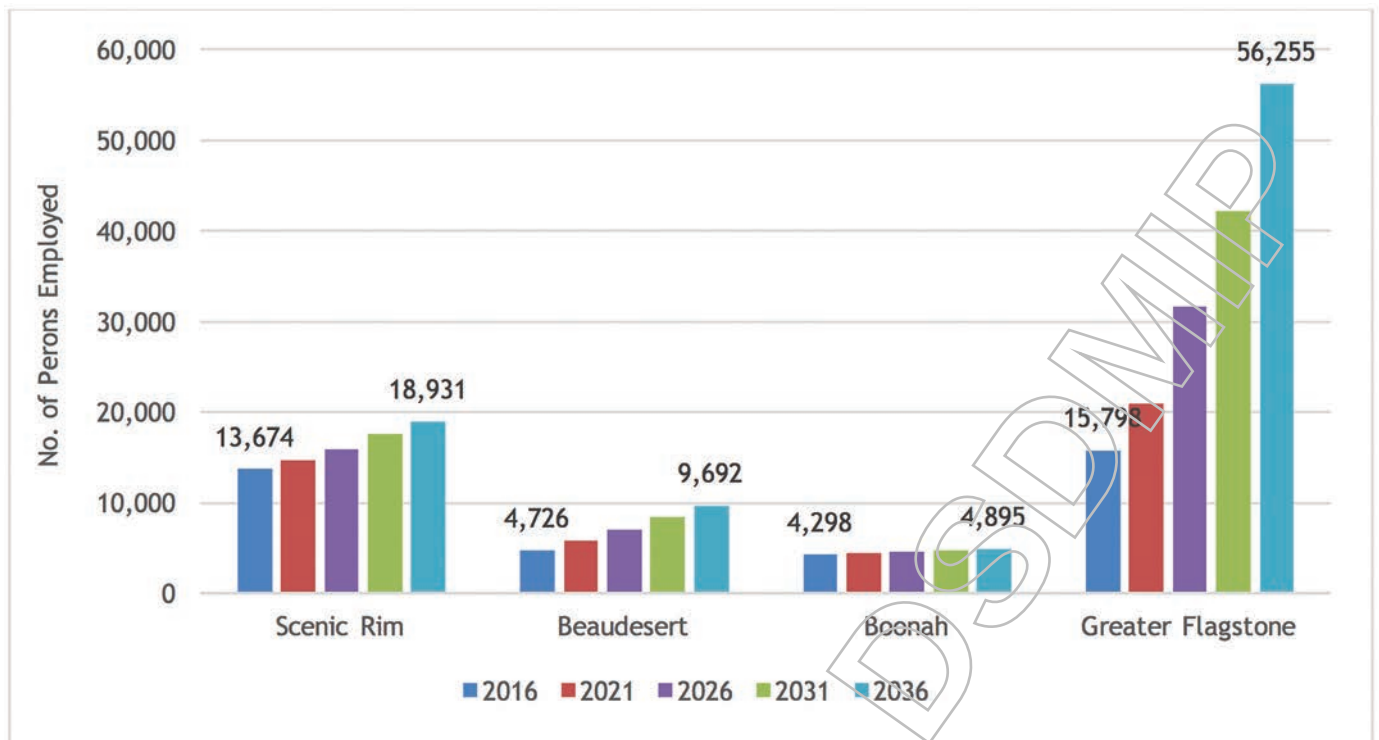


Source: ABS, Queensland Government Statisticians Office (2015), Economic Associates Analysis

As previously discussed in section 3.2.1, it is anticipated that there is a shortfall in available local workforce within the Scenic Rim and Beaudesert to support the development of the Bromelton SDA. Greater Flagstone/Yarrabilba represents the most proximate and logical alternative available workforce, which is anticipated to experience significant growth over 2016 to 2036. Figure 4.12 compares the available workforce of Greater Flagstone/Yarrabilba with the Scenic Rim, Beau-

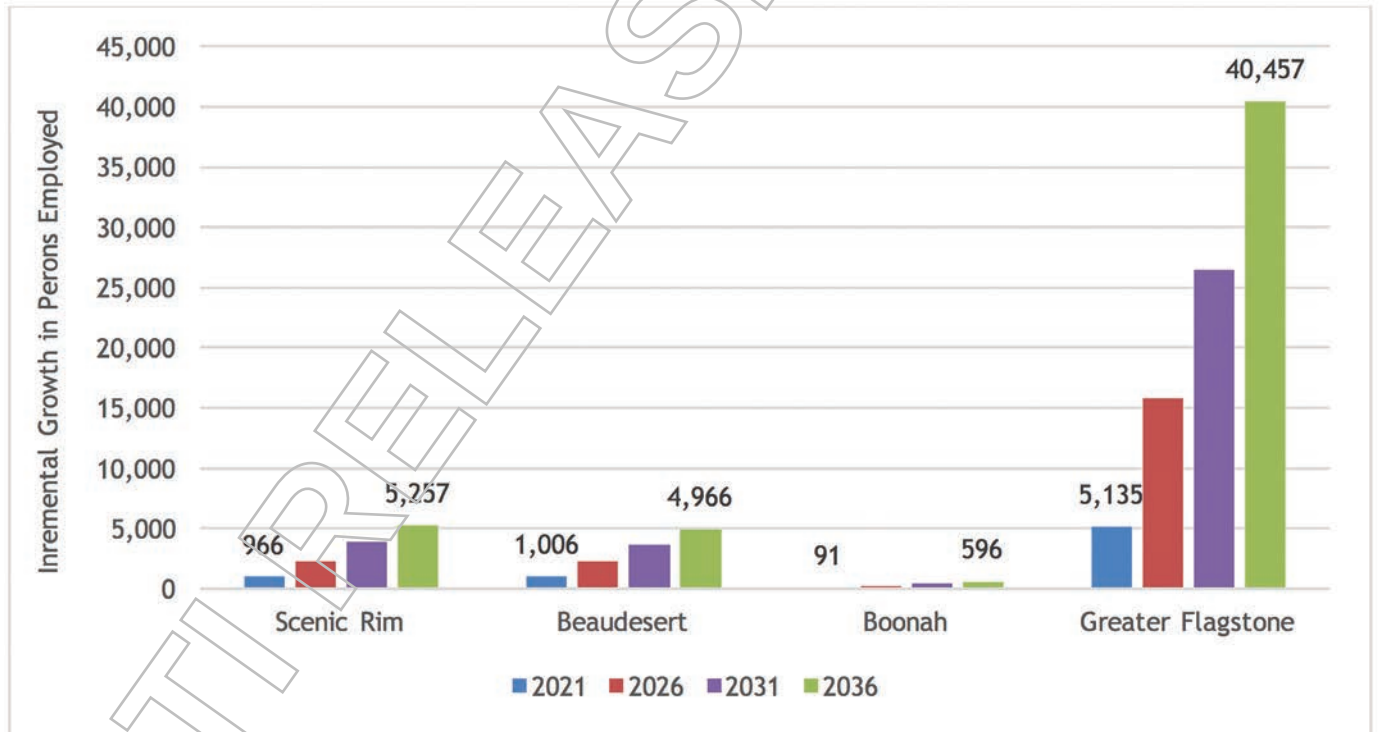
desert and Boonah between 2016 and 2036. It is apparent that the Greater Flagstone/Yarrabilba would provide access to an alternative source of workers to supplement the anticipated shortfalls in the local available workforce of the Scenic Rim (in particular Beaudesert). Figure 4.13 compares the incremental growth in available workforce of Greater Flagstone/Yarrabilba with the Scenic Rim, Beaudesert and Boonah between 2021 and 2036.

Figure 4.12: Available Workforce Comparison, 2016 to 2036



Source: Economic Associates Analysis

Figure 4.13: Incremental Growth in Available Workforce Comparison, 2016 to 2036



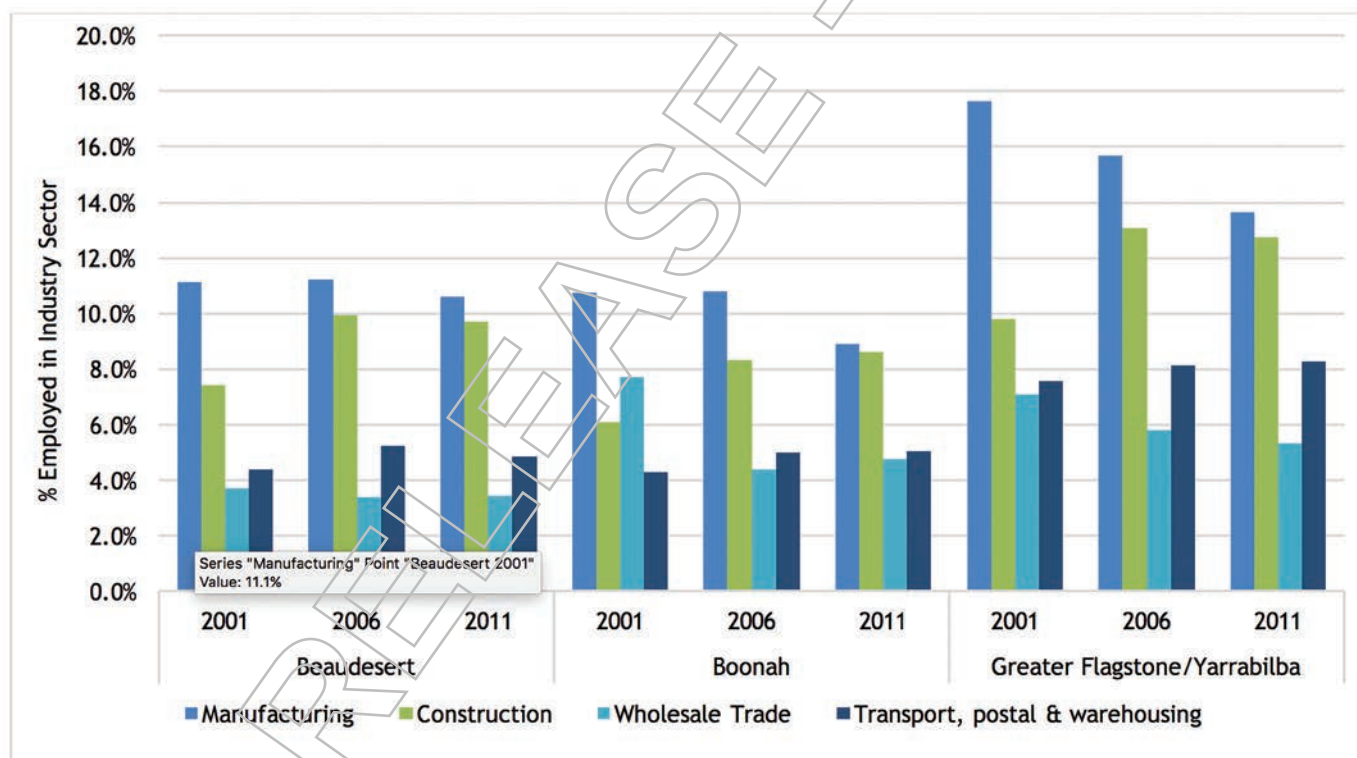
Source: Economic Associates Analysis

The Greater Flagstone/Yarrabilba community is anticipated to accommodate significant population growth underpinned by the Greenfield development of the Greater Flagstone PDA and Yarrabilba. The Greater Flagstone/Yarrabilba community represents a logical source of available workforce to supplement anticipated workforce shortages within the Scenic Rim to support the growth and development of Bromelton.

The demographic characteristics of the Greater Flagstone community is expected to evolve and reflect the similar demographic characteristics of other exemplar locations such as North Lakes and Greater Springfield. These communities are generally characterised by a skilled blue collar workforce with young families.

As a major industrial node, the Bromelton SDA is anticipated to generate employment predominantly within industrial sectors such as manufacturing, construction, wholesale trade and transport, postal and warehousing. Compared to Beaudesert and Boonah, the Greater Flagstone/Yarrabilba community exhibits a higher proportion of residents employed within the manufacturing, construction, wholesale trade and transport, postal and warehousing sectors as illustrated in Figure 4.10. Hence, the Greater Flagstone/Yarrabilba community represents a suitable alternative source of available workforce with the required skills to supplement the available local workforce and support the ongoing development of the Bromelton SDA.

Figure 4.14: Industry of Employment Comparison, Greater Flagstone/Yarrabilba, Beaudesert and Boonah, 2001 to 2011



Source: ABS Census of Population and Housing, Economic Associates Analysis

5. CONNECTIVITY WITH BROMELTON

As Bromelton develops, it is apparent that there is a shortfall in the location workforce population to not only support the employment requirements of Bromelton but also the local businesses of Beaudesert. With Greater Flagstone/Yarrabilba representing the most logical and proximate alternative workforce source to supplement the anticipated shortfall in the supply of available workforce, it is pertinent to ensure sufficient connectivity is developed and maintained.

The Mount Lindesay Highway and Beaudesert-Boonah Road provide the main connectivity between the Bromelton SDA and Greater Flagstone/Yarrabilba region. Other key connector roads linking the Greater Flagstone/Yarrabilba region to the Bromelton SDA (via the Mount Lindesay Highway and Beaudesert-Boonah Road) include:

- Camp Cable Road (main road connecting Yarrabilba to the Mount Lindesay Highway);
- Waterford-Tamborine Road,

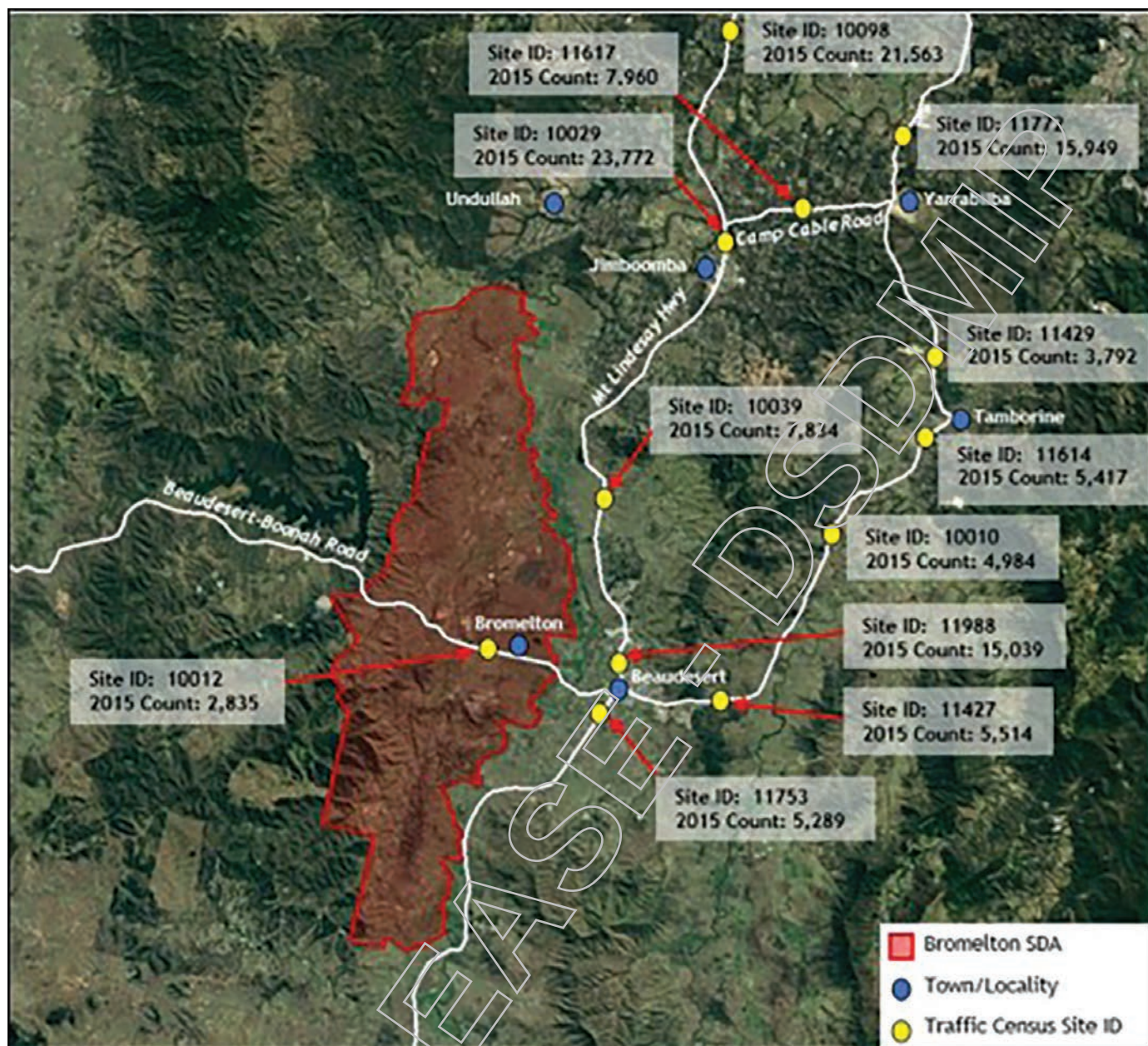
- Beaudesert-Beenleigh Road; and
- Beaudesert-Nerang Road.

Table 4.1 summarises traffic census data for the above roads between 2010 and 2015 with Figure 4.1 illustrating the location points of the traffic data. Between 2010 and 2015, traffic volumes along Camp Cable Road (Site ID11617) have increased an average of 6.2% per annum with traffic volumes along Mount Lindesay Highway south of Camp Cable Road increasing 4.4% per annum (Site ID10029). This is a likely reflection of the residential development of Yarrabilba. Within the Beaudesert Township traffic volumes along Mount Lindesay Highway between Birnam and Tubber Street (Site ID11988) increased 3.2% per annum between 2010 and 2015. Traffic volumes along the main arterial roads and connector roads are likely to increase over time as Bromelton SDA develops and attracts workers from the Greater Flagstone/Yarrabilba area.

Figure 4.1 illustrates the key roads providing connectivity to/from Beaudesert/Bromelton as well as the location of the identified traffic sites outlined in Table 5.1. The 2015 traffic counts for each identified site (outlined in Table 5.1) is also illustrated within Figure 5.1.



Figure 5.1: Key roads providing Connectivity to/from Beaudesert/Bromelton



Source: Google Earth, Department of Transport and Main Roads

Table 5.1: Traffic Census Data, Roads providing connectivity to Beaudesert/Bromelton, 2011 to 2015

Site ID	Road Name	Description	AADT						% growth p.a 2010-15
			2010	2011	2012	2013	2014	2015	
11427	Beaudes- ert-Nerang Road	220m east of Brooklands Drive east	4,927	4,944	5,036	5,138	5,487	5,514	2.3%
11617	Camp Cable Road	590m west of Hotz Road	5,885	5,729	5,791	6,073	6,630	7,960	6.2%
10012	Beaudes- ert-Boonah Road	1.4km west of Sandy Creek Rd, Beaudes- ert	3,075	2,837	2,768	2,842	2,852	2,835	-1.6%
10098	Mount Linde- say Highway (Brisbane-Beau- desert)	700m south of Stoney Camp Rd, Munruben	16,542	17,773	17,787	18,969	20,030	21,563	5.4%
10029	Mount Linde- say Highway (Brisbane-Beau- desert)	460m south of Camp Cable Rd, Jimboom- ba	19,211	21,044	20,135	20,629	21,217	23,772	4.4%
10039	Mount Linde- say Highway (Brisbane-Beau- desert)	WIM Site Cyrus Creek	8,300	8,294	8,371	7,844	7,844	7,844	-1.1%
11988	Mount Linde- say Highway (Brisbane-Beau- desert)	Between Birnam St & Tubber St	12,818	12,677	13,416	13,331	13,687	15,039	3.2%
11753	Mount Lindesay Highway (Beau- desert-Border)	450m north of Cryna Rd	4,702	5,078	4,774	5,219	5,294	5,289	2.4%
10010	Beaudes- ert-Beenleigh Road	Intersection of Tremayne Rd, Mundoolun	1,806	4,418	4,494	4,649	4,783	4,984	22.5%
11614	Beaudes- ert-Beenleigh Road	230m south of Munsterdale Rd	4,669	4,402	4,628	5,000	5,011	5,417	3.0%
11772	Waterford-Tam- borine Road	Between Anzac Av & Stockleigh Rd	9,989	11,134	11,094	11,950	14,056	15,949	9.8%
11429	Waterford-Tam- borine Road	Northern Abutment of Clutha Creek Bridge	2,564	2,689	3,038	3,485	3,581	3,792	8.1%

Source: Department of Transport and Main Roads Traffic Census (various years)

Upgrades to the Mount Lindesay Highway have commenced as part of the \$4.1 million improvement works, which include the construction of a dedicated turning lane outside Gleneagle State School to allow a safer entry/exit for motorists. A dedicated right-turn lane at the Veresdale Scrub intersection is also being constructed. Construction of a right-turn lane at the Undullah Road intersection at Woodhill has also commenced, which includes pavement widening. Road improvement works have also commenced at the intersection of Camp Cable Road and the Mount Lindesay Highway, which is to include the installation of traffic signals.

Funding for the design and construction of the Beaudesert Town Centre Bypass was announced in early 2015 to divert heavy vehicles around the town centre. The town centre bypass is to be at the existing Mount Lindesay Highway and run west of the town centre with an intersection at Bromelton Street (Beaudesert-Boonah Road). The town centre bypass will include:

- A new 1.5 kilometre section of the Mount Lindesay Highway;
- A two lane urban road that will provide a heavy vehicle bypass of the town centre;
- At grade signalised intersections at Helen Street and Bromelton Street; and
- Construction of a 50 metre bridge across Spring Creek as well as major drainage culverts particularly at Fisher's Gully¹⁸.

Internal road connections between Greater Flagstone and Bromelton SDA are provided via Bromelton House Road, Allan Creek Road, Brookland Road and Undullah Road (which provides connectivity with the Mount Lindesay Highway). These roads are generally characterised by a six metre wide, single carriage way with a single lane seal with speed limits generally varying between 60 kph and 80 kph. The Ferguson Reserve Bridge along Brookland Road is a narrow bridge that functions as a slow point (due to its narrowness) as part of the internal road connection within the Bromelton SDA. The JS Cochrane Bridge is a narrow bridge (barely two lanes) located along Undullah Road (west

of Brookland Road) that poses difficulty for passing vehicles at speed. As an alternative route between Greater Flagstone and the Bromelton SDA, these internal road connections will need to be upgraded and managed accordingly to support the development of the Bromelton SDA as a significant employment node.

6. OVERALL IMPLICATIONS FOR THE SCENIC RIM

The Scenic Rim is generally characterised by an older demographic, reflective of the Region's appeal to retirees and the region's long affiliation with the agricultural sector. As the local community continues to age the growth in the local skilled workforce is likely to diminish placing increasing pressure to seek alternative sources of available workforce that not only support local businesses but also have the necessary skills base required. The long term development of Bromelton as a significant industrial node will contribute to the need for Scenic Rim businesses to have access to a skilled workforce to supplement anticipated shortfalls in the availability of the local workforce and/or skills. The intent of Bromelton as a key industrial node will underpin demand by local businesses to have access to a large employment pool of skilled blue collar workers beyond the Scenic Rim.

The development of the Bromelton SDA as a major industry node for the Scenic Rim and South East Queensland more broadly will have a number of implications on the future development, role and function of the Scenic Rim Region and particularly Beaudesert. Beaudesert is the largest centre of the Scenic Rim and is the most proximate to the Bromelton SDA, hence the flow-on effects from the development of the Bromelton SDA are likely to be most prevalent within Beaudesert.

The construction of the SCT Logistics freight terminal indicates that development of Bromelton at this stage is in line with the accelerated development scenario (which assumes development take-up is brought forward by 10 years). Upon completion, the SCT Logistics fa-

18 <http://www.tmr.qld.gov.au/Projects/Name/M/Mount-Lindesay-Highway-Beaudesert-Town-Centre-Bypass.aspx>

cility will provide 1,000 direct jobs on site. Assuming, development of the Bromelton SDA continues to align with the accelerated development scenario, there will be a shortfall in the available local workforce in the next five years (i.e. 2021). Hence, alternative sources of labour (primarily skilled blue collar workers) will need to be investigated to support the ongoing development of the Bromelton SDA as well as local businesses (particularly those located in Beaudesert). Greater Flagstone and Yarrabilba represent the most logical and proximate source of available workforce and these areas are anticipated to experience significant population growth. The ability to attract workers from the Greater Flagstone/Yarrabilba, will require appropriate planning of infrastructure provisions (particularly road connectivity) to provide safe and convenient access for workers.

The ongoing development of the Bromelton SDA will result in a number of flow-on effects to the local community. Beaudesert is likely to experience the most notable flow-on effects as already mentioned. Anticipated flow-on effects that are likely to manifest in Beaudesert include:

- Changes in the structure of the demographic profile particularly in regards to age, with younger families likely to be attracted to Beaudesert for employment opportunities within the Bromelton SDA;
- Compositional changes of the local workforce in terms of skills and industry of the workforce (particularly within the transport, postal and warehousing industry sectors),

with the local workforce attaining the necessary skills and training likely to be required by businesses within the Bromelton SDA;

- Increase in household income levels as a result of the attraction of Bromelton SDA as a major employment node particularly for skilled blue collar workers; and
- Increases in the working age population compared to the retiree population as younger workers seek employment opportunities derived from the Bromelton SDA.

The structural and compositional changes of the employment and demographic profile of Beaudesert would also result in additional flow-on effects with respect to the provision of local services and infrastructure provided such as:

- Sufficient provision of retail and commercial services and facilities to cater for the needs of the local resident population as well as the workforce population. Demand for retail provision would result from the anticipated increase in household incomes and subsequent discretionary income;
- Provision of recreational (e.g. parks), community (e.g. libraries), educational (e.g. schools) and health (e.g. hospitals) infrastructure to support the local resident and workforce population; and
- Provision and maintenance of transport infrastructure (e.g. local roads, bridges, public transport etc.) to support the anticipated increases in traffic and workers within Beaudesert and surrounds.



APPENDIX A: BROMELTON EMPLOYMENT SCENARIOS

Table A. 1: Cumulative employment profile for Bromelton by land use type, Main Scenario

Year	Major Industry	Rail Dependent Precinct	Rail Sidings	Local services centre	Corporate Logistics	Total
2023	-	-	31	-	-	31
2024	-	240	62	-	-	302
2025	-	673	176	-	-	849
2026	168	866	290	-	-	1,324
2027	590	1,109	290	-	-	1,989
2028	1,012	1,352	290	-	-	2,654
2029	1,266	1,352	290	-	-	2,908
2030	1,557	1,502	290	-	-	3,349
2031	1,847	1,653	290	-	-	3,790
2032	2,138	1,803	290	-	-	4,231
2033	2,428	1,954	290	-	-	4,672
2034	2,719	2,104	290	-	-	5,113
2035	3,208	2,268	290	116	110	5,992
2036	3,697	2,431	290	232	221	6,871
2037	3,895	2,595	290	348	331	7,459
2038	4,094	2,758	290	464	442	8,048
2039	4,292	2,922	290	580	552	8,636
2040	4,620	3,287	290	580	552	9,329
2041	4,948	3,652	290	580	552	10,021
2042	5,077	4,016	290	580	552	10,516
2043	5,207	4,381	290	580	552	11,010
2044	5,336	4,746	290	580	552	11,504
2045	5,831	4,767	290	580	552	12,020
2046	6,325	4,788	290	580	552	12,535
2047	6,690	4,808	290	580	552	12,921
2048	7,056	4,829	290	580	552	13,307
2049	7,421	4,850	290	580	552	13,693
2050	8,454	4,854	290	580	552	14,730
2051	9,487	4,858	290	580	552	15,767
2052	10,155	4,862	290	580	552	16,439
2053	10,823	4,866	290	580	552	17,111
2054	11,492	4,870	290	580	552	17,784
2055	12,527	4,870	290	580	552	18,819
2056	13,563	4,870	290	580	552	19,855
2057	14,599	4,870	290	580	552	20,891
2058	15,635	4,870	290	580	552	21,927
2059	16,671	4,870	290	580	552	22,963
2060	17,039	4,870	290	580	552	23,331
2061	17,407	4,870	290	580	552	23,699
2062	17,774	4,870	290	580	552	24,066
2063	18,142	4,870	290	580	552	24,434
2064	18,510	4,870	290	580	552	24,802

Source: Queensland Utilities, Economic Associates Analysis

Table A. 2: Cumulative employment profile for Bromelton by land use type, Accelerated Scenario

Year	Major Industry	Rail Dependent Precinct	Rail Sidings	Local services centre	Corporate Logistics	Total
2016	172	-	-	-	-	172
2017	594	-	-	-	-	594
2018	1,016	-	-	-	-	1,016
2019	1,270	241	-	-	-	1,511
2020	1,561	674	-	-	-	2,234
2021	1,851	867	-	-	-	2,718
2022	2,142	1,110	36	-	-	3,287
2023	2,432	1,353	67	-	-	3,852
2024	2,723	1,353	181	-	-	4,256
2025	3,212	1,503	290	-	-	5,005
2026	3,701	1,654	290	-	-	5,644
2027	3,899	1,804	290	-	-	5,993
2028	4,098	1,954	290	-	-	6,342
2029	4,296	2,105	290	-	-	6,691
2030	4,624	2,268	290	-	-	7,182
2031	4,952	2,432	290	-	-	7,674
2032	5,081	2,596	290	-	-	7,967
2033	5,211	2,759	290	-	-	8,260
2034	5,340	2,923	290	118	112	8,783
2035	5,835	3,288	290	234	222	9,868
2036	6,329	3,652	290	350	333	10,954
2037	6,694	4,017	290	466	443	11,911
2038	7,060	4,382	290	580	552	12,864
2039	7,425	4,747	290	580	552	13,593
2040	8,458	4,768	290	580	552	14,648
2041	9,491	4,788	290	580	552	15,702
2042	10,159	4,803	290	580	552	16,390
2043	10,827	4,830	290	580	552	17,079
2044	11,495	4,851	290	580	552	17,768
2045	12,531	4,855	290	580	552	18,808
2046	13,567	4,859	290	580	552	19,848
2047	14,603	4,863	290	580	552	20,888
2048	15,639	4,867	290	580	552	21,928
2049	16,675	4,870	290	580	552	22,967
2050	17,043	4,870	290	580	552	23,335
2051	17,411	4,870	290	580	552	23,703
2052	17,778	4,870	290	580	552	24,070
2053	18,146	4,870	290	580	552	24,438
2054	18,510	4,870	290	580	552	24,802
2055	18,510	4,870	290	580	552	24,802
2056	18,510	4,870	290	580	552	24,802
2057	18,510	4,870	290	580	552	24,802
2058	18,510	4,870	290	580	552	24,802
2059	18,510	4,870	290	580	552	24,802
2060	18,510	4,870	290	580	552	24,802
2061	18,510	4,870	290	580	552	24,802
2062	18,510	4,870	290	580	552	24,802
2063	18,510	4,870	290	580	552	24,802
2064	18,510	4,870	290	580	552	24,802

Source: Economic Associates Analysis

Table A. 3: Cumulative employment profile for Bromelton by land use type, Extended Scenario

Year	Major Industry	Rail Dependent Precinct	Rail Sidings	Local services centre	Corporate Logistics	Total
2025	-	241	-	-	-	241
2026	-	674	33	-	-	706
2027	-	867	64	-	-	930
2028	-	1,110	178	-	-	1,287
2029	-	1,353	290	-	-	1,643
2030	-	1,353	290	-	-	1,643
2031	-	1,503	290	-	-	1,793
2032	-	1,653	290	-	-	1,943
2033	-	1,804	290	-	-	2,094
2034	-	1,954	290	-	-	2,244
2035	-	2,105	290	-	-	2,395
2036	170	2,268	290	-	-	2,729
2037	592	2,432	290	-	-	3,314
2038	1,014	2,595	290	117	111	4,128
2039	1,268	2,759	290	233	222	4,772
2040	1,559	2,923	290	349	332	5,452
2041	1,849	3,287	290	465	442	6,334
2042	2,140	3,652	290	580	552	7,214
2043	2,431	4,017	290	580	552	7,870
2044	2,721	4,382	290	580	552	8,525
2045	3,210	4,747	290	580	552	9,379
2046	3,699	4,767	290	580	552	9,889
2047	3,898	4,788	290	580	552	10,108
2048	4,096	4,809	290	580	552	10,327
2049	4,294	4,830	290	580	552	10,546
2050	4,622	4,851	290	580	552	10,895
2051	4,950	4,855	290	580	552	11,227
2052	5,080	4,859	290	580	552	11,360
2053	5,209	4,863	290	580	552	11,494
2054	5,338	4,867	290	580	552	11,627
2055	5,833	4,870	290	580	552	12,125
2056	6,328	4,870	290	580	552	12,620
2057	6,693	4,870	290	580	552	12,985
2058	7,058	4,870	290	580	552	13,350
2059	7,423	4,870	290	580	552	13,715
2060	8,456	4,870	290	580	552	14,748
2061	9,489	4,870	290	580	552	15,781
2062	10,158	4,870	290	580	552	16,450
2063	10,826	4,870	290	580	552	17,118
2064	11,494	4,870	290	580	552	17,786
2065	12,530	4,870	290	580	552	18,822
2066	13,566	4,870	290	580	552	19,858
2067	14,601	4,870	290	580	552	20,893
2068	15,637	4,870	290	580	552	21,929
2069	16,673	4,870	290	580	552	22,965
2070	17,041	4,870	290	580	552	23,333
2071	17,409	4,870	290	580	552	23,701
2072	17,777	4,870	290	580	552	24,069
2073	18,144	4,870	290	580	552	24,436
2074	18,510	4,870	290	580	552	24,802

Source: Economic Associates Analysis



APPENDIX B: POPULATION AND DEMOGRAPHIC PROFILE

Table B. 1: Demographic Profile Comparison, Scenic Rim, Beaudesert, Boonah and Greater Flagstone/Yarrabilba 2001 to 2011

	Beaudesert SA2			Boonah SA2			Scenic Rim Regional Council			Greater Flagstone/Yarrabilba		
	2001	2006	2011	2001	2006	2011	2001	2006	2011	2001	2006	2011
Population (2011 Counted at Home)	9,651	10,911	12,219		9,829	10,899	29,635	33,106	36,399	19,478	25,308	30,968
Ave. Annual Population Growth (%)	-	2.5%	2.3%	-	1.4%	2.1%	-	2.2%	1.9%	-	5.4%	4.1%
Age Distribution												
0-14 years	22.6%	21.4%	21.8%	24.1%	22.4%	20.7%	22.6%	21.4%	20.8%	27.5%	28.0%	26.9%
15-24 years	13.3%	11.7%	12.0%	10.7%	11.2%	10.7%	11.0%	10.8%	10.7%	12.0%	11.6%	12.3%
25-34 years	11.1%	10.3%	10.1%	10.8%	9.4%	9.0%	11.4%	9.8%	9.0%	15.6%	13.3%	11.0%
35-44 years	14.9%	14.4%	13.2%	14.2%	13.3%	12.7%	15.6%	14.7%	13.9%	18.1%	18.8%	18.6%
45-54 years	13.7%	14.1%	13.8%	13.8%	14.0%	14.7%	14.1%	14.7%	14.9%	14.3%	13.5%	14.4%
55-64 years	10.1%	12.9%	12.5%	10.9%	13.2%	14.2%	11.4%	13.7%	13.9%	7.7%	9.8%	10.0%
65+ years	14.3%	15.2%	16.6%	15.4%	16.5%	18.0%	14.0%	14.9%	16.8%	4.9%	5.0%	6.8%
Average age (years)	37.4	39.2	39.3	32.4	39.5	40.9	37.9	39.4	40.4	31.4	32.0	33.2
Labour Market												
Full-time employment (% labour force)	60.0%	60.3%	57.7%	63.7%	61.5%	59.8%	60.2%	60.0%	57.3%	62.5%	65.1%	62.3%
Part-time employment (% labour force)	25.5%	28.7%	29.0%	25.8%	29.2%	29.4%	26.5%	30.0%	30.8%	23.8%	24.8%	26.6%
Total employment (% labour force)	92.4%	95.4%	93.1%	95.3%	96.4%	95.4%	93.3%	95.9%	94.1%	93.0%	96.4%	94.6%
Unemployment rate (% labour force)	7.6%	4.6%	6.9%	4.7%	3.6%	4.6%	6.7%	4.1%	5.9%	7.0%	3.6%	5.4%
Participation rate (% of population > 15 years)	57.2%	56.6%	57.0%	58.1%	59.8%	59.6%	58.5%	59.4%	59.6%	68.5%	68.5%	70.7%
Qualifications												
% of persons with a non-school qualification	23.4%	27.7%	33.3%	24.1%	30.2%	36.3%	29.0%	34.7%	40.7%	30.6%	35.8%	41.5%
% of persons with Bachelor or higher	5.8%	5.1%	7.3%	6.5%	7.8%	9.5%	8.3%	9.9%	11.8%	5.6%	5.8%	8.6%
% of persons with Diploma	3.9%	4.7%	5.5%	4.2%	5.3%	6.4%	5.6%	6.4%	7.5%	4.8%	6.0%	6.9%
% of persons with Certificate	13.6%	16.8%	20.5%	13.3%	17.0%	20.4%	15.1%	18.4%	21.5%	20.2%	23.1%	26.0%
Occupation												
Upper White Collar												
Managers	18.6%	15.6%	15.1%	22.4%	18.9%	19.3%	19.1%	16.5%	16.3%	10.7%	10.4%	11.0%
Professionals	10.2%	10.8%	11.1%	11.0%	11.0%	10.9%	13.4%	14.1%	14.6%	9.4%	9.9%	11.2%
Subtotal	28.7%	26.4%	26.2%	33.4%	29.9%	30.2%	32.5%	30.5%	30.9%	20.1%	20.3%	22.1%
Lower White Collar												

Continued... Table B. 1: Demographic Profile Comparison, Scenic Rim, Beaudesert, Boonah and Greater Flagstone/Yarrabilba 2001 to 2011

	Beaudesert SA2			Boonah SA2			Scenic Rim Regional Council			Greater Flagstone/Yarrabilba		
	2001	2006	2011	2001	2006	2011	2001	2006	2011	2001	2006	2011
Community & Personal Service Workers	9.6%	9.2%	10.6%	8.0%	9.0%	9.9%	10.1%	9.8%	10.6%	7.8%	7.9%	8.6%
Clerical and Admin Workers	11.4%	11.4%	12.7%	10.6%	11.3%	11.5%	11.3%	11.4%	12.3%	16.8%	16.5%	17.1%
Sales Workers	7.3%	7.9%	8.1%	6.9%	8.2%	8.0%	7.2%	7.8%	7.7%	9.8%	9.3%	9.1%
Subtotal	28.2%	28.5%	31.4%	25.5%	28.5%	29.5%	28.6%	29.0%	30.7%	34.4%	33.7%	34.8%
Upper Blue Collar												
Technicians & Trades Workers	14.1%	16.4%	15.7%	14.1%	14.8%	15.9%	14.6%	16.5%	16.2%	19.5%	20.3%	19.4%
Subtotal	14.1%	16.4%	15.7%	14.1%	14.8%	15.9%	14.6%	16.5%	16.2%	19.5%	20.3%	19.4%
Lower Blue Collar												
Machinery Operators & Drivers	8.6%	9.0%	9.4%	8.1%	8.6%	8.6%	7.4%	7.5%	7.6%	12.5%	11.7%	11.2%
Labourers	17.9%	17.7%	15.6%	17.4%	16.8%	14.5%	14.8%	14.6%	12.9%	11.2%	12.2%	10.4%
Subtotal	26.6%	26.7%	25.0%	25.5%	25.4%	23.1%	22.2%	22.2%	20.5%	23.8%	23.9%	21.6%
Employment by Industry (% of employees)												
Agriculture, forestry & fishing	14.6%	11.6%	10.6%	20.3%	15.8%	14.4%	13.3%	9.7%	8.9%	2.6%	1.8%	1.3%
Mining	0.3%	0.5%	0.6%	0.6%	0.6%	1.0%	0.4%	0.5%	0.7%	0.4%	0.5%	0.9%
Manufacturing	11.1%	11.2%	10.6%	10.8%	10.8%	8.9%	9.9%	9.8%	8.7%	17.7%	15.7%	13.6%
Electricity, gas, water & waste services	1.1%	0.8%	1.3%	1.1%	1.6%	2.0%	0.9%	1.0%	1.4%	1.1%	1.0%	1.2%
Construction	7.4%	9.9%	9.7%	6.1%	8.3%	8.6%	7.4%	10.0%	9.9%	9.8%	13.1%	12.7%
Wholesale trade	3.7%	3.4%	3.5%	7.7%	4.4%	4.7%	4.8%	3.4%	3.6%	7.1%	5.8%	5.3%
Retail trade	8.4%	9.9%	9.3%	9.3%	10.8%	10.1%	8.7%	10.2%	9.4%	11.5%	11.6%	10.9%
Accommodation & food services	7.9%	5.9%	6.3%	3.4%	4.4%	5.4%	6.6%	6.9%	7.0%	3.6%	3.4%	3.9%
Transport, postal & warehousing	4.4%	5.3%	4.9%	4.3%	5.0%	5.0%	3.9%	4.5%	4.4%	7.6%	8.2%	8.3%
Information media & telecommunications	1.3%	1.1%	1.1%	1.0%	0.6%	0.6%	1.5%	1.1%	1.0%	1.3%	1.2%	0.8%
Financial & insurance services	1.3%	1.3%	1.1%	1.5%	1.5%	1.4%	1.3%	1.5%	1.5%	1.9%	1.9%	1.9%
Rental, hiring & real estate services	1.6%	1.4%	1.3%	0.8%	1.0%	1.0%	1.5%	1.6%	1.5%	1.5%	1.8%	1.4%
Professional, scientific & technical services	2.5%	3.1%	3.6%	2.5%	2.9%	3.4%	3.2%	4.0%	4.6%	3.8%	3.5%	4.4%
Administrative & support services	2.0%	2.0%	2.5%	1.7%	1.3%	1.8%	2.6%	2.2%	2.7%	3.1%	2.6%	2.8%
Public administration & safety	6.0%	7.3%	6.5%	4.2%	6.3%	6.2%	8.2%	7.8%	7.3%	4.8%	5.5%	5.3%
Education & training	9.1%	7.5%	7.9%	8.8%	8.6%	7.8%	8.9%	8.3%	8.4%	5.8%	6.0%	6.7%
Health care & social assistance	8.3%	9.1%	10.5%	9.3%	9.3%	10.5%	8.5%	9.4%	10.6%	7.8%	7.8%	9.3%
Arts & recreation services	1.9%	2.0%	1.8%	1.0%	0.9%	0.8%	1.8%	1.9%	1.7%	0.8%	0.9%	1.0%
Other services	4.1%	3.6%	4.2%	3.6%	3.6%	4.0%	3.8%	3.7%	4.0%	5.3%	4.8%	5.3%

Source: ABS Census of Population and Housing, Economic Associates Analysis

Table B. 2: Demographic Profile Comparison, Greater Springfield, Northern Gold Coast, North Lakes, SEQ and Queensland, 2001 to 2011

	Greater Springfield			Northern Gold Coast			North Lakes			South East Queensland			Queensland		
	2001	2006	2011	2001	2006	2011	2001	2006	2011	2001	2006	2011	2001	2006	2011
Population (2011 Counted at Home)	7,464	15,381	25,086	17,452	30,801	51,160	2,510	8,321	17,710	2,248,251	2,526,825	2,810,109	3,585,639	3,973,958	4,392,097
Ave. Annual Population Growth (%)	-	15.6%	10.3%	-	12.0%	10.7%	-	27.1%	16.3%	-	2.4%	2.1%	-	2.1%	2.0%
Age Distribution															
0-14 years	29.2%	28.7%	27.8%	28.2%	27.3%	28.3%	29.0%	31.3%	31.1%	20.6%	19.8%	19.6%	21.3%	20.4%	20.0%
15-24 years	15.0%	14.4%	14.5%	12.3%	12.5%	12.8%	12.0%	9.9%	12.9%	14.2%	14.1%	13.9%	13.8%	13.6%	13.4%
25-34 years	17.7%	18.4%	19.1%	17.1%	16.5%	16.9%	21.9%	18.8%	15.5%	14.6%	13.8%	14.1%	14.2%	13.3%	13.4%
35-44 years	15.9%	16.8%	17.0%	16.3%	17.3%	16.9%	18.2%	19.9%	20.9%	14.9%	14.8%	14.6%	14.9%	14.6%	14.2%
45-54 years	12.0%	11.0%	11.3%	13.2%	11.5%	11.3%	12.8%	10.9%	11.7%	13.7%	13.5%	13.3%	13.7%	13.7%	13.6%
55-64 years	6.6%	7.1%	6.6%	7.3%	8.6%	7.6%	4.2%	6.3%	4.6%	9.5%	11.1%	11.2%	9.7%	11.4%	11.7%
65+ years	3.5%	3.7%	3.7%	5.6%	6.3%	6.2%	1.9%	2.8%	3.4%	12.6%	12.9%	13.3%	12.4%	13.0%	13.7%
Average age (years)	29.4	29.5	29.6	35.0	36.1	36.2	28.7	29.2	29.0	36.7	37.5	37.7	36.6	37.6	38.0
Labour Market															
Full-time employment (% labour force)	62.2%	67.6%	66.8%	59.2%	62.9%	62.0%	64.3%	65.2%	64.0%	58.0%	60.9%	59.0%	58.6%	61.4%	59.9%
Part-time employment (% labour force)	24.2%	22.0%	22.3%	25.9%	26.1%	26.5%	24.6%	25.5%	25.4%	27.3%	28.5%	29.2%	26.6%	27.7%	28.1%
Total employment (% labour force)	92.7%	95.5%	94.5%	91.1%	94.6%	93.5%	95.4%	96.4%	94.9%	91.6%	95.3%	93.7%	91.8%	95.3%	93.9%
Unemployment rate (% labour force)	7.3%	4.5%	5.5%	8.9%	5.4%	6.5%	4.6%	3.6%	5.1%	8.4%	4.7%	6.3%	8.2%	4.7%	6.1%
Participation rate (% of population > 15 years)	70.9%	72.6%	75.9%	68.1%	70.0%	71.0%	72.1%	71.9%	73.2%	60.8%	61.7%	63.2%	60.6%	61.1%	62.2%
Qualifications															
% of persons with a non-school qualification	32.3%	38.4%	47.5%	33.1%	39.4%	45.6%	38.7%	50.6%	56.7%	34.1%	39.5%	45.6%	32.3%	37.5%	43.3%
% of persons with Bachelor or higher	7.5%	3.6%	16.1%	7.5%	8.3%	12.0%	9.3%	15.9%	19.6%	12.4%	15.2%	18.6%	10.8%	13.1%	15.9%
% of persons with Diploma	5.2%	7.2%	9.2%	6.1%	7.3%	9.2%	7.6%	10.3%	12.2%	6.0%	7.2%	8.2%	5.5%	6.6%	7.6%
% of persons with Certificate	19.5%	20.5%	22.2%	19.5%	22.6%	24.4%	21.8%	24.3%	25.0%	15.7%	17.1%	15.8%	16.0%	17.8%	19.8%
Occupation															
Upper White Collar															
Managers	8.0%	10.4%	11.9%	13.3%	11.9%	12.4%	10.8%	13.3%	13.4%	11.7%	11.9%	11.9%	12.9%	12.4%	12.1%
Professionals	11.1%	13.4%	17.5%	12.2%	13.2%	14.8%	14.7%	17.9%	19.9%	18.1%	19.1%	21.1%	16.4%	17.2%	19.0%
Subtotal	19.1%	23.8%	29.4%	25.5%	25.1%	27.2%	25.5%	31.2%	33.3%	29.9%	31.0%	33.0%	29.3%	29.6%	31.1%
Lower White Collar															

	Greater Springfield			Northern Gold Coast			North Lakes			South East Queensland			Queensland		
	2001	2006	2011	2001	2006	2011	2001	2006	2011	2001	2006	2011	2001	2006	2011
Community & Personal Service Workers	10.5%	9.5%	10.3%	8.2%	8.3%	9.6%	7.8%	8.0%	10.4%	9.0%	9.1%	10.0%	8.9%	9.1%	9.9%
Clerical and Admin Workers	18.1%	17.9%	17.3%	15.8%	15.8%	15.6%	18.9%	19.3%	17.4%	16.3%	15.8%	15.6%	15.0%	14.8%	14.7%
Sales Workers	10.0%	9.7%	9.7%	11.8%	11.4%	11.0%	12.0%	11.7%	11.4%	11.4%	10.8%	10.2%	10.7%	10.3%	9.8%
Subtotal	38.6%	37.1%	37.3%	35.8%	35.5%	36.2%	38.7%	39.0%	39.2%	36.7%	35.7%	35.8%	34.7%	34.2%	34.4%
Upper Blue Collar															
Technicians & Trades Workers	17.3%	17.4%	14.6%	17.5%	18.8%	17.2%	16.3%	15.7%	13.7%	14.4%	14.7%	13.9%	14.7%	15.3%	14.9%
Subtotal	17.3%	17.1%	14.6%	17.5%	18.8%	17.2%	16.3%	15.7%	13.7%	14.4%	14.7%	13.9%	14.7%	15.3%	14.9%
Lower Blue Collar															
Machinery Operators & Drivers	10.2%	8.8%	8.0%	8.6%	7.4%	7.4%	8.7%	5.0%	4.8%	6.9%	6.2%	6.0%	7.8%	7.2%	7.3%
Labourers	12.7%	11.5%	8.9%	10.8%	11.3%	10.2%	9.5%	7.6%	7.3%	10.2%	10.7%	9.5%	11.5%	11.9%	10.5%
Subtotal	22.9%	20.3%	16.9%	19.4%	18.7%	17.6%	18.2%	12.6%	12.2%	17.1%	16.9%	15.5%	19.3%	19.1%	17.8%
Employment by Industry (% of employees)															
Agriculture, forestry & fishing	0.5%	0.4%	0.1%	2.3%	0.7%	0.4%	1.1%	0.2%	0.2%	1.9%	1.3%	1.0%	4.9%	3.4%	2.8%
Mining	0.4%	0.4%	1.0%	0.5%	0.5%	0.9%	0.0%	0.4%	1.1%	0.4%	0.5%	1.0%	1.2%	1.7%	2.6%
Manufacturing	20.6%	17.7%	13.8%	13.5%	13.9%	11.3%	15.0%	11.9%	9.1%	11.2%	10.3%	8.6%	10.5%	9.9%	8.4%
Electricity, gas, water & waste services	1.1%	1.0%	1.3%	0.7%	0.8%	0.9%	1.4%	1.1%	1.5%	0.8%	0.9%	1.1%	1.0%	1.0%	1.2%
Construction	6.3%	8.0%	7.8%	11.3%	13.9%	13.4%	7.8%	8.9%	8.9%	7.1%	9.1%	8.9%	6.9%	9.0%	9.0%
Wholesale trade	5.6%	5.7%	5.2%	5.2%	5.0%	4.8%	5.9%	5.1%	4.1%	5.0%	4.2%	3.9%	4.9%	3.9%	3.6%
Retail trade	11.2%	11.4%	10.7%	12.0%	11.9%	11.7%	13.3%	12.8%	11.6%	11.7%	11.8%	10.7%	11.5%	11.6%	10.6%
Accommodation & food services	4.3%	4.4%	4.6%	6.3%	6.3%	6.0%	3.5%	4.0%	5.3%	7.4%	6.9%	7.0%	7.4%	7.0%	6.9%
Transport, postal & warehousing	5.8%	6.3%	6.2%	4.8%	4.7%	4.8%	7.3%	6.7%	6.8%	5.0%	5.0%	5.2%	5.2%	5.1%	5.2%
Information media & telecommunications	1.8%	1.3%	1.1%	2.3%	1.6%	1.6%	2.0%	1.7%	1.1%	2.2%	1.7%	1.5%	1.9%	1.4%	1.2%
Financial & insurance services	3.1%	3.2%	3.5%	2.5%	2.7%	2.8%	4.5%	4.9%	3.9%	3.4%	3.4%	3.2%	2.8%	2.9%	2.7%
Rental, hiring & real estate services	1.6%	2.0%	1.8%	2.6%	2.6%	2.1%	1.7%	2.6%	2.3%	2.2%	2.3%	2.0%	2.0%	2.1%	1.8%
Professional, scientific & technical services	3.3%	5.1%	6.1%	4.8%	4.5%	5.7%	5.4%	5.6%	6.6%	6.5%	6.7%	7.8%	5.4%	5.6%	6.5%
Administrative & support services	3.4%	3.6%	3.1%	3.2%	3.3%	3.5%	4.2%	2.7%	3.4%	3.5%	3.3%	3.4%	3.2%	3.0%	3.2%
Public administration & safety	7.4%	7.3%	9.4%	4.2%	3.9%	4.6%	5.1%	6.5%	7.3%	5.9%	6.4%	6.7%	6.2%	6.7%	6.7%
Education & training	6.0%	5.8%	6.5%	6.6%	6.0%	6.4%	6.3%	6.7%	6.7%	8.0%	7.6%	8.0%	8.0%	7.6%	7.9%
Health care & social assistance	10.1%	9.6%	11.3%	6.9%	7.6%	9.7%	8.9%	10.4%	13.3%	9.8%	10.6%	12.3%	9.5%	10.2%	11.9%
Arts & recreation services	0.8%	1.2%	1.0%	3.8%	2.9%	2.6%	1.0%	1.2%	0.8%	1.7%	1.6%	1.6%	1.5%	1.4%	1.4%
Other services	4.7%	3.7%	3.6%	3.9%	3.9%	4.1%	4.6%	4.2%	3.8%	4.1%	3.8%	3.8%	4.0%	3.7%	3.9%

Source: ABS Census of Population and Housing, Economic Associates Analysis

Table B. 3: Population Projections, Scenic Rim, Beaudesert and Boonah 2006 to 2036

	2006	2011	2016	2021	2026	2031	2036	2006-2036 % growth p.a
Total Population								
Scenic Rim	34,231	37,437	41,014	45,813	51,205	57,662	63,396	2.1%
Beaudesert	11,314	12,705	14,305	17,724	21,934	26,964	31,669	3.5%
Boonah	10,419	11,168	12,020	12,856	13,834	14,820	15,777	1.4%
Population 15-64 years (No.)								
Scenic Rim	21,957	23,433	24,862	26,618	29,025	31,984	34,421	1.5%
Beaudesert	7,137	7,878	8,593	10,421	12,667	15,300	17,623	3.0%
Boonah	6,511	6,900	7,164	7,315	7,617	7,891	8,158	0.8%
Population 15-64 years (% of Total Population)								
Scenic Rim	64.1%	62.6%	60.6%	58.1%	56.7%	55.5%	54.3%	-
Beaudesert	63.5%	62.0%	60.1%	58.8%	57.8%	56.7%	55.6%	-
Boonah	62.5%	61.8%	59.6%	56.9%	55.1%	53.2%	51.7%	-
Population 65+ years (No.)								
Scenic Rim	5,108	6,323	8,038	9,386	12,036	14,503	16,909	4.1%
Beaudesert	1,742	2,120	2,726	3,594	4,772	6,260	7,824	5.1%
Boonah	1,699	2,009	2,519	3,059	3,657	4,283	4,873	3.6%
Population 65+ years (% of Total Population)								
Scenic Rim	14.9%	16.9%	19.6%	21.6%	23.5%	25.2%	26.7%	-
Beaudesert	15.4%	16.7%	19.1%	20.3%	21.8%	23.2%	24.7%	-
Boonah	16.3%	18.0%	21.0%	23.8%	26.4%	28.9%	30.9%	-

Source: ABS Regional Population Growth data (Catalogue No. 3218.0), Queensland Government Statisticians Office (2015)



EMPLOYMENT IMPLICATIONS OF THE DEVELOPMENT OF BROMELTON

Report

PREPARED FOR:
Scenic Rim Regional Council
82 Brisbane Street
Beaudesert QLD 4285

PREPARED BY:
Economic Associates Pty Ltd
ACN 085 445 610
PO Box 541 Spring Hill QLD 4004
Telephone: (07) 3839 1011
Facsimile: (07) 3839 1022

August 2016 - 16024 Report Rev B

© Economic Associates Pty Ltd



ECONOMIC ASSOCIATES



APPENDIX 3 - Former Council Resolution of 23 October 2013 of Submission to Designate Land at Warrill View for Rural Residential Purposes in the South East Queensland Regional Plan 2009-2031

RTI RELEASE - DSDMIP

Copy of Appendix 3 to be supplied via File Transfer (One Drive)