

# CHAMPION REDLANDS COAST: SKILLS ATTRACTION ASSESSMENT SUMMARY

**Client:** Redland Coast Chamber of Commerce

**Title:** CHAMPION REDLANDS COAST: SKILLS  
ATTRACTION ASSESSMENT SUMMARY

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Prepared for:

**Redland Coast Chamber of  
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#### VERSION CONTROL

VERSION	PURPOSE	AUTHOR	REVIEWER	APPROVER	APPROVAL DATE
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DraftB	Full draft report	MW	EW	MW	19/04/2022
FINAL	Final Report	MW	EW, CRC	MW	24/04/2022
Summary	Summary Report	MW	EW	MW	16/09/2022

#### APPROVAL FOR ISSUE

APPROVER	CONTACT	SIGNATURE	DATE
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## SUMMARY

- Econisis have been engaged by the Redland Coast Chamber of Commerce to undertake further research and analysis for the Champion Redlands Coast. This research is designed to identify how the competitiveness themes and location attributes, outlined in Phase 1 impact the attractiveness of the Redlands Coast region and its economic precincts and activity centres influence the attractiveness to new skilled workers.

### Role Of Liveability In Worker Attraction

- The post-pandemic environment is increasingly characterised by a growing competition for workers, particularly skilled workers. Unemployment rates during the COVID-19 pandemic declined sharply in Queensland in recent quarters and, at the time of this report, sits 4.3%.
- This trend in short-term unemployment declines aligns with a longer-term trend in decreased labour force availability relative to the wider population. Estimates in the 2021 Intergenerational Report by the Australia Government was that the current Old Age Dependency Ratio (ratio of working aged people 15-64 to people aged 65+) of 3.9 will decline rapidly to 3.3 by 2027/28.
- The result of this decline is that, even with a growing population and strong migration, Australia's economy has the potential to grow at a faster rate than its labour force, at a time when there is increased dependency on the economy to fund health and welfare services of older Australians.
- The skills identified in the Phase 1 projections highlight a growing critical mass of professional services, health and education related skills in the Redlands Coast region. The consequence for the Redlands Coast of increased national and global competition for skilled workers is therefore potential for the current and future critical mass of professional, health and other skilled workers to be incentivised to leave the region to other locations regarded as more "liveable" and providing more economic and social opportunities.
- There has been strong evidence at an international level for over 30 years of the link between local and regional liveability and workforce attraction and business investment. While positive liveability factors can "pull" a new worker or resident to an area, negative factors can also "push" people to move away.
- In 2018, Brisbane East (which includes the Redlands Coast region) ranked 9th in metropolitan areas of Australia in terms of its relative liveability with the region. However, this declined to 14<sup>th</sup> by 2020.
- The results of the Liveability Index highlight the primary challenge facing the Redlands Coast region. Strong scores in the natural environment, outdoor lifestyle and safety, community and social cohesion align with the competitive advantages identified by RPS in the Phase 1 report. This supports a strong set of natural inherent liveability attributes.
- However, other regions are improving their competitiveness and liveability at a faster rate and are overtaking the Redlands Coast region by leveraging and investing economic and social liveability attributes.

### Centre/Precinct Liveability Assessment

- Econisis has drawn on the Liveability attributes in the Ipsos Life in Australia surveys to undertake a similar independent assessment for centres and precincts within the Redlands Coast.
- The assessment has been undertaken for the Activity Centres and Economic Precincts identified by RPS in the Phase 1 analysis of the local competitive advantages. However, changes have been made to the list of locations assessment to ensure alignment with local communities and statistical areas.

- For each location, an evidence-based quantitative Multi-Criteria Assessment (MCA) has been undertaken to assess the significance of each attribute. Key Measures of liveability attributes are outlined in the table below.

**Table 1 Measures of Liveability Attributes**

Liveability Attributes	Measure/Data Sets/Evidence
Housing Choice and Affordability	<ul style="list-style-type: none"> <li>Median House Prices (realestate.com.au) as a ratio of Median Personal Income (ABS)</li> <li>Attached dwelling share of housing stock (ABS)</li> </ul>
Access to Health Care	<ul style="list-style-type: none"> <li>Proximity to Major Hospital</li> <li>GPs per 1,000 Residents (ABS)</li> </ul>
Access to Education	<ul style="list-style-type: none"> <li>Proximity to Major University</li> <li>Proximity to TAFE</li> <li>Number of Local Schools (Qld Govt)</li> </ul>
Public Transport Options	<ul style="list-style-type: none"> <li>Presence of rail station</li> <li>Presence of local bus services</li> </ul>
Access to natural environment	<ul style="list-style-type: none"> <li>Proximity to and access to the Bay</li> <li>Presence of major parks and open space</li> <li>Presence/proximity to environmental reserves</li> </ul>
Access to Good Local Jobs in a Prosperous Economy	<ul style="list-style-type: none"> <li>Local Unemployment Rate (SALM)</li> <li>Number of Jobs per 1,000 people aged 15-64 (ABS)</li> <li>Number of Locally Registered Businesses per 1,000 residents (ABS)</li> </ul>
Access to Shopping, Services and Activities	<ul style="list-style-type: none"> <li>Presence/proximity to major sub-regional or regional level shopping centre (PCA)</li> <li>Proximity to major arts, recreation and sporting facilities</li> </ul>
Level of social cohesion, equality, and sense of community spirit	<ul style="list-style-type: none"> <li>Socio-economic index (ABS)</li> <li>Share of Population Born Outside of Australia (ABS)</li> </ul>

- The liveability “Pull” factors for Redlands Coast are currently, inexorably linked to the region’s high quality natural environment and outdoor recreation and lifestyle. This has made the region a residential destination of choice for high income skilled workers, supporting investment in retail and sport and recreation facilities, while the ageing of the population has helped to underpin increased investment in health.



**Figure 1 Liveability “Push and Pull” Factors, Redlands Coast Region, 2022**

- However, the region lacks a diversity of liveability attractors, which is acting as a negative or “Push” factor in the attraction of younger skilled households. The region lacks a critical mass of non-outdoor lifestyle and recreation drivers, while there is a high propensity for workers and tertiary students to leave the region for employment and study each day. This is typically by car as inter-regional public transport connectivity is below optimal, particularly south of Cleveland.
- These “Push” factors are then further exacerbated by poor housing choice and affordability in the region, which makes the cost to households (either direct through house prices or indirect through frictional housing choice imbalances) of the “pull” factors greater than in other regions of South East Queensland.
- Therefore, while protecting and enhancing the value of the “pull” factors are important to the maintenance of the region’s liveability for skilled worker households, addressing the “push” factors is arguably more critical to enhancing the liveability of the region and maximising its economic and social competitiveness.

### Assessment Of Local Housing Choice For Workers

- Housing choice and affordability was expressly identified in both the Ipsos surveys for Brisbane East and in the regional liability assessment as a major drag on regional and local liveability for skilled worker attraction.
- Housing represents a critical factor in worker attraction in part because it contributes to both the quality and cost of living of a location as a potential residential and employment destination.
- The drivers of housing preferences are not only a factor of age and household-based demographics but also of values, preferences and lifestyle choices. These factors, referred to as psychographics, are central to the development of housing product mixes within master planned communities but do not feature significantly in wider urban planning across whole of regions, particularly in town planning.
- Median house prices across the Redlands Coast region had experienced only moderate growth in recent years. However, all markets saw an acceleration in sales volumes in 2021 as demand from interstate buyers (supported by strong northward migration patterns from NSW and especially Victoria) increased buyer purchaser power and activity.

**Table 2 Median House Prices, Redlands Coast Precincts, 2016 to 2021<sup>1</sup>**

Year	Thornside-Birkdale	Wellington Point	Ormiston	Cleveland	Alexandra Hills	Capalaba	Thornlands	Victoria Point	Sheldon-Mount Cotton	Redland Bay
2016	\$544,000	\$600,000	\$620,000	\$584,000	\$442,500	\$493,700	\$589,000	\$523,500	\$525,000	\$529,800
2017	\$560,000	\$615,000	\$673,500	\$585,000	\$467,500	\$497,000	\$613,000	\$530,000	\$536,000	\$547,000
2018	\$580,000	\$620,000	\$681,500	\$646,500	\$475,000	\$500,000	\$636,000	\$535,000	\$555,000	\$563,000
2019	\$565,000	\$642,000	\$730,000	\$600,000	\$460,000	\$493,000	\$585,000	\$516,000	\$556,000	\$550,000
2020	\$633,750	\$665,000	\$806,250	\$675,000	\$491,500	\$510,000	\$616,000	\$550,000	\$566,000	\$575,000
2021	\$800,000	\$870,000	\$936,500	\$805,000	\$613,000	\$650,000	\$771,000	\$660,000	\$697,500	\$699,500

- These trends are not Redlands Coast specific and is currently being experienced by a range of locations across South East Queensland. However, Redlands Coast region was already a comparatively expensive and unaffordable location prior to the recent price growth, it has had the effect of worsening the region’s relative competitiveness and place increased strain on local liveability for skilled workers.

<sup>1</sup> Realestate.com.au (2022) Housing Trends – Select Suburb profiles, Realestate.com.au

- A review of data on bedroom numbers in Redlands Coast Dwellings reveals a structural overrepresentation of four- and five-bedroom homes across almost all precincts/locations assessed, and an underrepresentation of two- and three-bedroom dwellings.
- This reinforces concerns regarding a lack of choice and options for demographic and psychographic housing market cohorts that align with skilled workers. Apart from Cleveland and parts of Alexandra Hills and Capalaba, much of the region has a comparatively homogenous housing stock.
- If the locations within the Redlands Coast delivered a housing mix with a similar bedroom breakdown to that of Greater Brisbane, then this would require an additional 2,787 one- and two-bedroom dwellings by 2041 and an additional 2,177 three-bedroom dwellings.

### Conclusions And Next Steps

- The natural environment and outdoor lifestyle climate of the Redlands Coast region underpins its enviable and attractive liveability for skilled workers. However, in recent years, the growth and enhancement of this liveability has slowed in response to recent challenges in local housing affordability and choice, below average local employment opportunities and a lack of diversity of non-outdoor entertainment.
- At the same time, other regions of SEQ –including those less blessed with natural environmental assets – have been the beneficiaries of major investments in transport, education, health and social and community infrastructure and facilities, making them increasingly more attractive than the Redlands Coast to skilled workforces.
- In response, effort is required to leverage the natural environmental competitive advantages of the region and complement these with increased diversity of attractors and drivers of skilled worker migration. Key focus areas for the Redlands Coast to enhance the liveability of the region to skilled workers include:
  - Maximise housing choice and affordability in the region;
  - Increase the availability and choice of social and community amenities and activities to help provide non-outdoor environment entertainment options;
  - Support the attraction and establishment of a tertiary university campus offering; and
  - Promote and encourage major investments in public and private transport infrastructure in the region,

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