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South East Queensland

POPULATION, HOUSING, JOBS, CONNECTIVITY AND LIVEABILITY

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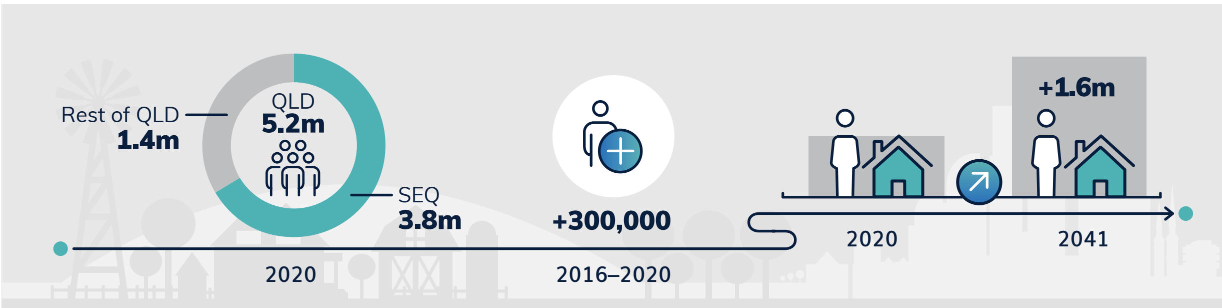
Executive Summary

South East Queensland (SEQ) is one of the fastest growing regions in Australia and home to one in seven Australians. Governments at all levels aim to support this growth by delivering a better-connected region, providing better infrastructure, creating more jobs, and protecting the region's liveability.

This report aims to support the Department's policy and project delivery by providing an evidence base on the spatial distribution of population and population growth, housing, jobs, skills, connectivity and liveability. This evidence base can be used to monitor how population, jobs, connectivity and liveability change over time and respond to investment.

Population growth

This report analyses the SEQ region population to understand the growth patterns and trends in the region over time. The SEQ region has **3.8 million population** as of 30 June 2020, which is about two-thirds of the total Queensland population. Between 2016 and 2020, SEQ added just over **300,000 new residents**, at an annual growth rate of 2.1 per cent. By 2041, the region is expected to accommodate an additional **1.6 million residents**, which is a 44 per cent increase since 2020.



1 The **main growth** LGAs between 2016 and 2020 were Brisbane (**88,200 extra residents**), Gold Coast (**59,900**) and Moreton Bay (**40,300**).

2 **Internal migration** was the most dominant source of population growth (**38 per cent**) between 2017 and 2020, followed by international migration (**33 per cent**) and natural increase (**29 per cent**).

3 The Ipswich LGA has the **highest annual average growth rate** of **3.5 per cent** from 2016 to 2020, followed by Sunshine Coast (**2.7 per cent**) and Gold Coast (**2.5 per cent**).

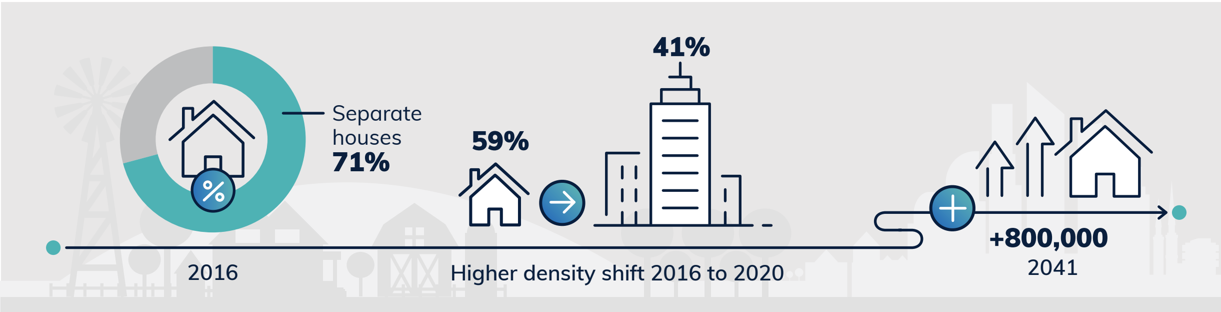
4 The small areas that **added the most residents** from 2016 to 2020 were **Pimpama** in the Gold Coast LGA, **Jimboomba** in Logan, and **North Lakes-Mango Hill** in Moreton Bay.

5 **328,000 new residents** are projected for the Ipswich LGA by 2041. Significant growth is also projected for Gold Coast (**308,000**) and Brisbane (**278,000**).

6 The small areas projected to add the most residents to 2041 are **Ripley** in Ipswich LGA (**117,000**) and **Greenbank** in Logan LGA (**74,000**).

Housing and housing affordability

In 2016, there were 1.36 million dwellings in SEQ, with **separate houses** being the **dominant dwelling type** (**71 per cent**). However, only 59 per cent of new residential building approvals from 2016 to 2020 were for separate houses, indicating a recent **shift towards higher density** forms of housing. By 2041, the SEQ region is expected to need more than **800,000 new dwellings** to accommodate the projected population increase.



1. **166,000 new residential building approvals** across the 12 SEQ LGAs between 2016 and 2021.

2. The Moreton Bay LGA had the most **new house approvals** (**17,414**). The Brisbane LGA had the most approvals of other new residential buildings (**30,015**), reflecting **higher density** development.

3. The **small areas** with the most **residential building approvals** in the last 5 years were Pimpama in the Gold Coast LGA, Caloundra West in the Sunshine Coast and Ripley in Ipswich.

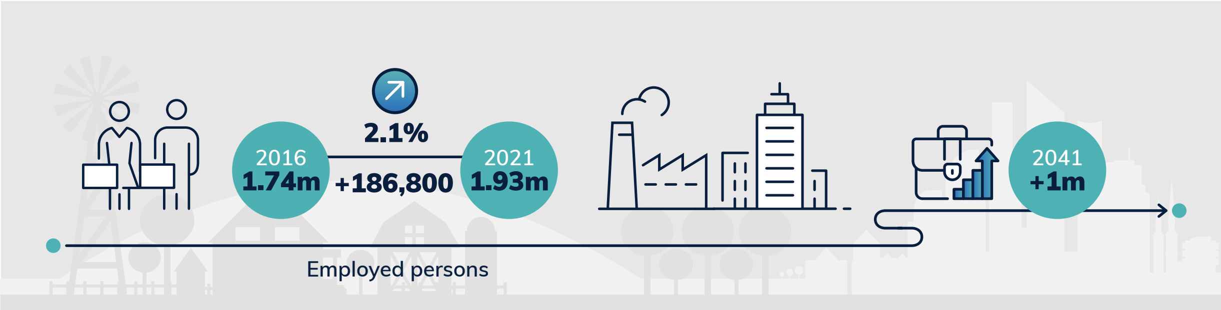
4. **Logan and Ipswich** LGAs are the major expansion areas, possessing **51 per cent** of **land suitable for development** in SEQ.

5. The Brisbane LGA is expected to add the most **new dwellings** between 2016 and 2041 (**155,200**), closely followed by the Gold Coast (**150,900**) and Ipswich LGAs (**146,000**).

6. Rental stress affects more SEQ households than mortgage stress. **17 per cent** of households in the Gold Coast LGA experienced **rental stress in 2016** – the highest share amongst Australia's 21 largest cities.

Jobs and industries

This report provides a snapshot of the spatial distribution of employment in SEQ as of 2016, and summarises the available evidence on recent employment growth in SEQ. As of August 2021, **1.93 million employed persons resided in SEQ**. The number of employed residents of SEQ increased by 186,800 persons between 2016 and 2021, representing an average **annual growth rate of 2.1 per cent**. By 2041, the region's growth is anticipated to require around **one million new jobs**.



1 **48 per cent** of SEQ employed people worked in the **Brisbane** LGA, while **16 per cent** worked in the **Gold Coast** LGA in 2016.

2 The number of people who work in the Brisbane LGA significantly outnumber its employed residents. However, the Redland and Moreton Bay LGAs have a notable shortfall of local jobs, with around 0.6 local workers per employed resident.

3 The Brisbane City SA2 is the main place of work with **122,500 employed persons**, representing **8.3 per cent of the SEQ** total in 2016, followed by South Brisbane (27,500), Southport North (24,200) and Rocklea-Acacia Ridge (23,300).

4 The **Gold Coast** SA4 had the largest increase in employed residents of all SA4s in SEQ from 2016 to 2021, gaining **44,700 employed persons**.

5 **14.5 per cent** of SEQ employment is in the **Health care** and **social assistance** industry as of August 2021, followed by Retail trade (10.2 per cent) and Construction (9.1 per cent).

6 The **Health care** and **social assistance** industry was the major source of employment growth in SEQ from 2016 to 2021. It added 43,900 employed persons, which was **23.5 per cent of total growth**.

Skills

A skilled workforce is an enabler of economic growth. Overall, SEQ had **30 per cent** of its working population with a **Bachelor degree or higher qualification** in 2016, the same as the national level (30 per cent). **Professionals** were the largest occupational group in SEQ (with a **21.1 per cent employment share**) and were the biggest occupational contributor to SEQ's employment growth from 2016 to 2021.

1 The Brisbane LGA had the highest proportion of **Professionals** (**27 per cent**), followed by the Sunshine Coast and Toowoomba (both **20 per cent**) in 2016.

2 Of the 12 LGAs, the Brisbane LGA has the largest share of people with a **Bachelor degree** or higher qualification, at **35 per cent**.

3 Inner Brisbane is the focal point of SEQ's knowledge economy, with **48 per cent** of its working population holding a **Bachelor degree** or higher qualification.

4 Professionals were the biggest occupational contributor to SEQ's employment growth from 2016 to 2021, with an increase of **82,200 persons**, which is **43.9 per cent** of the total employment increase.

5 Queensland is becoming more educated. **Postgraduate degree qualifications** are projected to grow the most by 2024–25 (**26.9 per cent**), followed by Bachelor degrees (**15.9 per cent**).

6 **Professionals** are projected to grow by **16.1 per cent** by 2024 (compared to 2019), followed by Community and personal service workers (**14.3 per cent**) and Managers (**12.1 per cent**) in Queensland.

Transport

Private vehicle was the most popular transport mode in SEQ, with **79 per cent** of employed residents travelling to work by **private vehicle** in 2016, while **10 per cent used public transport** and **6 per cent worked at home**. The public transport mode share declined across SEQ during the COVID-19 pandemic and remains well below pre-pandemic levels. Working from home grew strongly during the pandemic, and SEQ employees would prefer to keep work from home uptake well above pre-pandemic levels.

1 **69 per cent o**f employed residents of the Brisbane LGA journeyed to work by **private vehicles** and **18 per cent** by **public transport** in 2016.

2 Public transport use was much less common in other LGAs. In Lockyer Valley, Scenic Rim, Somerset and Toowoomba, less than **2 per cent** of employed residents used **public transport** to get to work.

3 Transport mode use varies across SEQ. Only **57 per cent** of Inner Brisbane employed residents used private vehicle to get to work, compared to **85 per cent** in the Rest of SEQ in 2016.

4 **Work from hom**e uptake by employees in Brisbane was **35 per cent** at the peak of the pandemic, compared to 27 per cent for the whole of SEQ.

Connectivity

This report analyses journey-to-work movements across SEQ to provide insights into how workers are currently using the transport network as part of their daily commuting patterns. Across the 12 LGAs of SEQ, over **70 per cent** of employed residents **worked within their LGA of residence** in 2016. **Ten per cent** of all SEQ workers **commuted to the Brisbane** CBD for work, while SEQ's average commuting distance was 17.5km. On average, residents could access 43 per cent of SEQ's jobs within a 45-minute car commute in 2019, down slightly from 2016, reflecting an increase in congestion and travel times in the region. The average **commuting** trip duration for Greater Brisbane **increased from 31 minutes** in 2010 to **34 minutes** in 2019.

1 **Self-containment rates** were highest for the **Toowoomba** (**89 per cent**) and Brisbane LGAs (85 per cent), and lowest for the Logan (40 per cent) and Redland LGAs (43 per cent).

2 **Over 70 per cent** of Inner Brisbane's workforce **commuted to work** from outside the ring in 2016 – the largest proportion across the four BCARR rings of SEQ.

3 While **31 per cent** of Inner Brisbane residents commuted to the CBD for work, this dropped to **17 per cent** for Middle Brisbane, 7 per cent for Outer Brisbane and 1 per cent for the Rest of SEQ.

4 **Average commuting distances** were lowest for employed residents of **Inner Brisbane** (8.7km), and highest for the Rest of SEQ (24.3km) in 2016.

5 Brisbane and Logan LGAs showed the **strongest 45-minute job access** in 2019, providing employed residents with access to an average of **65 per cent** and **61 per cent** of all SEQ jobs, respectively.

6 The Brisbane and Gold Coast LGAs experience similar levels of **traffic congestion**, but the Sunshine Coast has relatively low levels of traffic congestion.

Liveability

The report analyses three key indicators of liveability from the Australian Urban Observatory (AUO): **access to services** (including health, education, arts and culture infrastructure, and community and sports infrastructure), **walkability** and access to **public open space**.

Overall, at the LGA scale, **Brisbane scored highest** on the access to **services** and **walkability** metrics, but **Redland**, **Noosa**, **Gold Coast** and **Moreton Bay** outperformed Brisbane on access to **public open space**. The expansion growth areas (new and developing areas) scored lower than consolidation growth areas (infill developments) for all of the indicators.

1 The **Brisbane LGA scored highest** on all of the liveability indicators except for access to public open space. In particular, the most highly liveable areas were centred around Inner and Middle Brisbane.

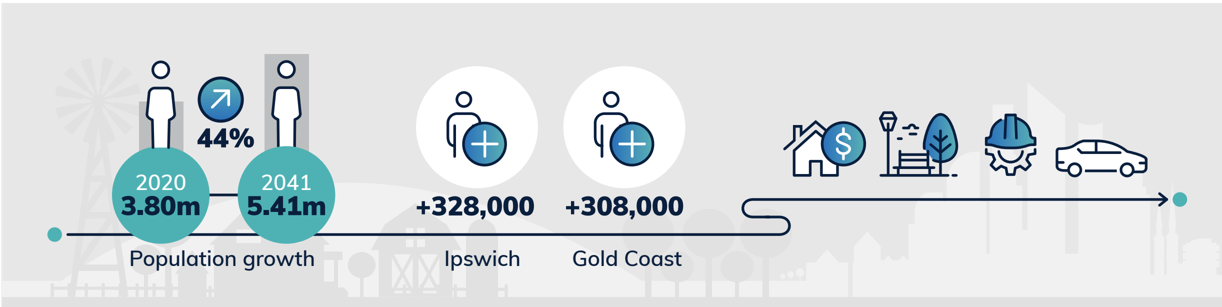
2 **Toowoomba** also performed well, scoring in the top three for all of the **access to services** measures.

3 **Gold Coast** scored well for access to **arts and culture** infrastructure, as did Scenic Rim for access to community and sports infrastructure and Somerset for access to health infrastructure.

4 **Brisbane** and **Gold Coast** were the **most walkable** LGAs, while Scenic Rim, Somerset and Lockyer Valley were the least walkable LGAs.

Implications of growth

SEQ is expected to reach **5.41 million population by 2041**, a **44 per cent increase** on 2020. This growth is likely to be concentrated in the Ipswich and Gold Coast LGAs, adding over **300,000 new residents** each. This report draws together the evidence on current and future focal points for population growth in SEQ and explores some of the implications for housing, housing affordability, jobs, skills, liveability, transport and commuter flows over the coming decades.



1 The *ShapingSEQ* strategic plan aims to accommodate this population growth by locating **60 per cent of new dwellings** in the existing urban area (consolidation), a shift to medium and high-density forms of housing, and smaller lot sizes.

2 The Brisbane LGA is expected to accommodate **45 per cent of employment growth** (on a place of work basis), but only 19 per cent of SEQ's population growth from 2016 to 2041.

3 The Moreton Bay, Logan and Ipswich LGAs will capture a much **smaller share** of SEQ's **jobs growth** than its population growth.

4 This imbalance between population and jobs growth suggests many future residents of these 3 outer LGAs will spend **significant time commuting** to the Brisbane LGA **to access jobs**. These impacts could be managed through initiatives to improve transport connections and facilitate development of employment precincts in suburban growth areas.

5 In the short term, **Professionals** are expected to show the **largest growth in occupations**, with strong growth in workers with bachelor degrees and higher qualifications. A higher-skilled workforce will make SEQ more adaptable to technological changes.

6 Much of SEQ's future **population growth** is expected to be concentrated in **outer suburban areas** that currently offer relatively poor access to services and low walkability to residents.

7 **Consolidation growth** has far more **positive outcomes** than expansion growth for resident's level of access to services, public open space and walkability.

8 A trade-off exists between liveability and housing affordability— **housing** is usually **more affordable** in **non-coastal outer-suburban** expansion areas.

9 The areas projected to experience the largest population increase from 2020 to 2041 (such as Ripley, Greenbank and Coomera) are located close to at least one of the Queensland Government's **five key economic corridors**. These corridors contain SEQ's major employment precincts.

10 **Commuter travel** in SEQ is very **car-dependent.** The areas projected to grow in future, currently have low public transport use. Significant and timely investment in public transport will help reduce congestion and manage road network impacts.