



**8 Economic Environment**



## 8.1 Introduction, methodology and policy context

SGS Economics and Planning (SGS) was commissioned to undertake the economic impact assessment for the Landsborough to Nambour Rail Project.

### 8.1.1 Objectives of the economic impact assessment

The objectives of the economic impact assessment were to analyse and explain:

- key characteristics of potentially affected communities in the project area, with community profiles
- accommodation, including analysis of the rental market, vacancy rate and housing cost
- the character and basis of the local and regional economies
- mitigation and enhancement strategies
- skills and training opportunities
- strategies responding to Government Policy on training, indigenous employment and locally sourced goods and services
- the general economic benefits from the project.

### 8.1.2 Project background

With the South East Queensland (SEQ) region experiencing significant population growth, the SEQ Regional Plan and its associated SEQ Infrastructure Plan and Program (SEQIPP) identify rail infrastructure and service upgrades as being integral to achieving the integrated transport vision for the SEQ region. The Landsborough to Nambour Rail project is one part of a four part upgrade to the Sunshine Coast rail network planned by 2026.

### 8.1.3 Methodology

This section of the report outlines the approach and methods used in the collation and analysis of the baseline data and the assessment of the economic impacts. This includes work undertaken to inform the Route Identification Report (2008).

SGS has utilised the following methodology in preparing this report.

#### Study tour and inception

SGS took part in a study tour (August 2007), travelling in the general area of the corridor investigation and viewing specific sites (stations, tunnels, overpasses, etc.). Following the tour, the Department of Transport and Main Roads and its consultants met with various council officers and other State government stakeholders to discuss the background to the project, general project timing/milestones, expected issues and required output for the EIS.

#### Consultation

SGS participated in a number of meetings with key council officers, to gain local information and planning background. SGS has also reviewed feedback from activities undertaken by the study team.

#### Review relevant economic development policy documentation

Relevant local and regional economic strategy and policy documents have been reviewed to confirm the policy environment impacting upon the economic development of Brisbane's northern region and the Sunshine Coast as a result of the project. In turn, these policy settings have been considered in broad terms for how they might influence potential (and preferred) transport solutions. Key regional documents reviewed and interpreted for their influence on the region's 'future economy' include:

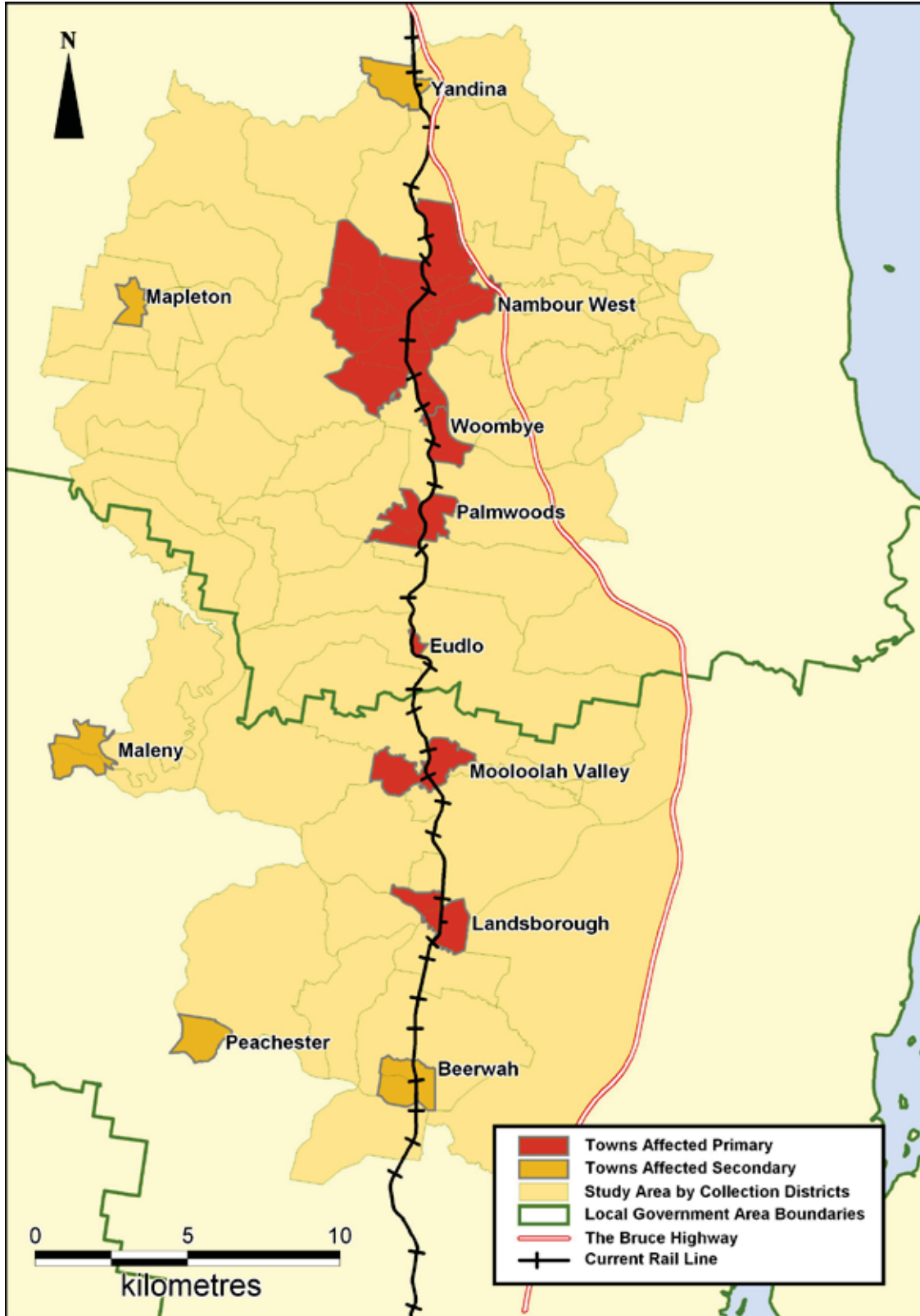
- *South East Queensland Regional Plan*
- *South East Queensland Infrastructure Plan and Program*
- *Queensland Smart State Strategy 2005-2015*
- the State government's 'Leading Smart Regions' program
- Regional and sub-regional economic plans – Economic Vision Statement for the former Northern Regional Organisation of Councils (NORSROC), the Sunshine Coast Regional Economic Development Strategy, local economic development strategies (e.g. for the former Noosa Shire, Maroochy Shire and Caloundra City, etc.)
- the State Government Building and Construction Contracts Structured Training Policy (the 10% Policy)
- Indigenous Employment Policy for Queensland Government Building and Civil Construction Projects (the 20% Policy)
- former Department of State Development (now Department of Employment, Economic Development and Innovation), Local Industry Policy.

#### Assess socio-economic environment

SGS Economics and Planning has prepared a socio-economic and demographic assessment to provide the broader study with a firm understanding of the current baseline status, including population trends, employment, income and housing prices.

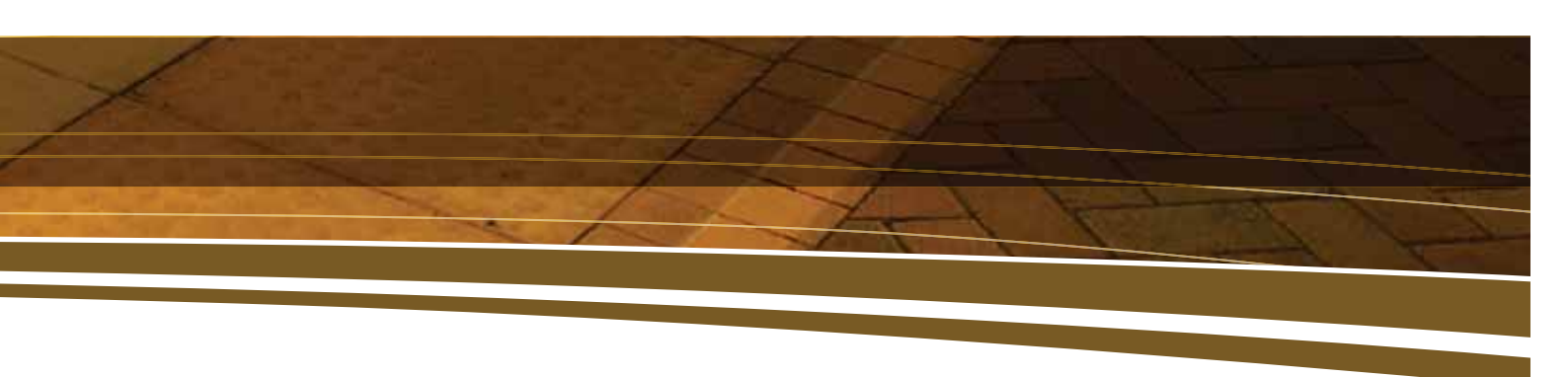
For the purpose of this assessment, the study area can be defined as consisting of multiple Collector District (CD) areas. These CD areas are based upon Australian Bureau of Statistics (ABS) Census 2006 data. The study area is contained within the Sunshine Coast Regional Council area. **Figure 8.1a** overleaf depicts the study area and key features contained within this area. The study area includes townships which are outside of the rail corridor, but where rail transport via the north coast line (NCL) is still likely to be used, and therefore, the influence of the project is relevant.

Figure 8.1a: Economic impact assessment study area



Whilst every care has been taken to ensure the accuracy of this data, the Department of Transport and Main Roads makes no representations or warranties about its accuracy, reliability, completeness or suitability for any particular purpose and disclaims all responsibility and all liability (including without limitation, liability in negligence) and costs which might be incurred as a result of the plan being inaccurate or incomplete in any way and for any reason.

Source: Australian Bureau of Statistics, 2006 and CDATA, 2001



The data for the socio-demographic and economic baseline was sourced largely from the ABS 2006 and 2001 Censuses and in some cases via discussions with council officers and industry representatives. 2001 Census data has been used only for comparisons of some data over time (2001 to 2006) to provide an understanding of recent trends.

#### **Economic development literature review**

SGS has examined a number of recent studies relating to rail development and associated benefits and impacts to ensure the full range of relevant and current issues are assessed.

#### **Identify potential economic benefits and impacts**

SGS has used the information from the preceding stages of this study to identify potential economic benefits and impacts, and key issues within the study area.

#### **Assess economic benefits and impacts**

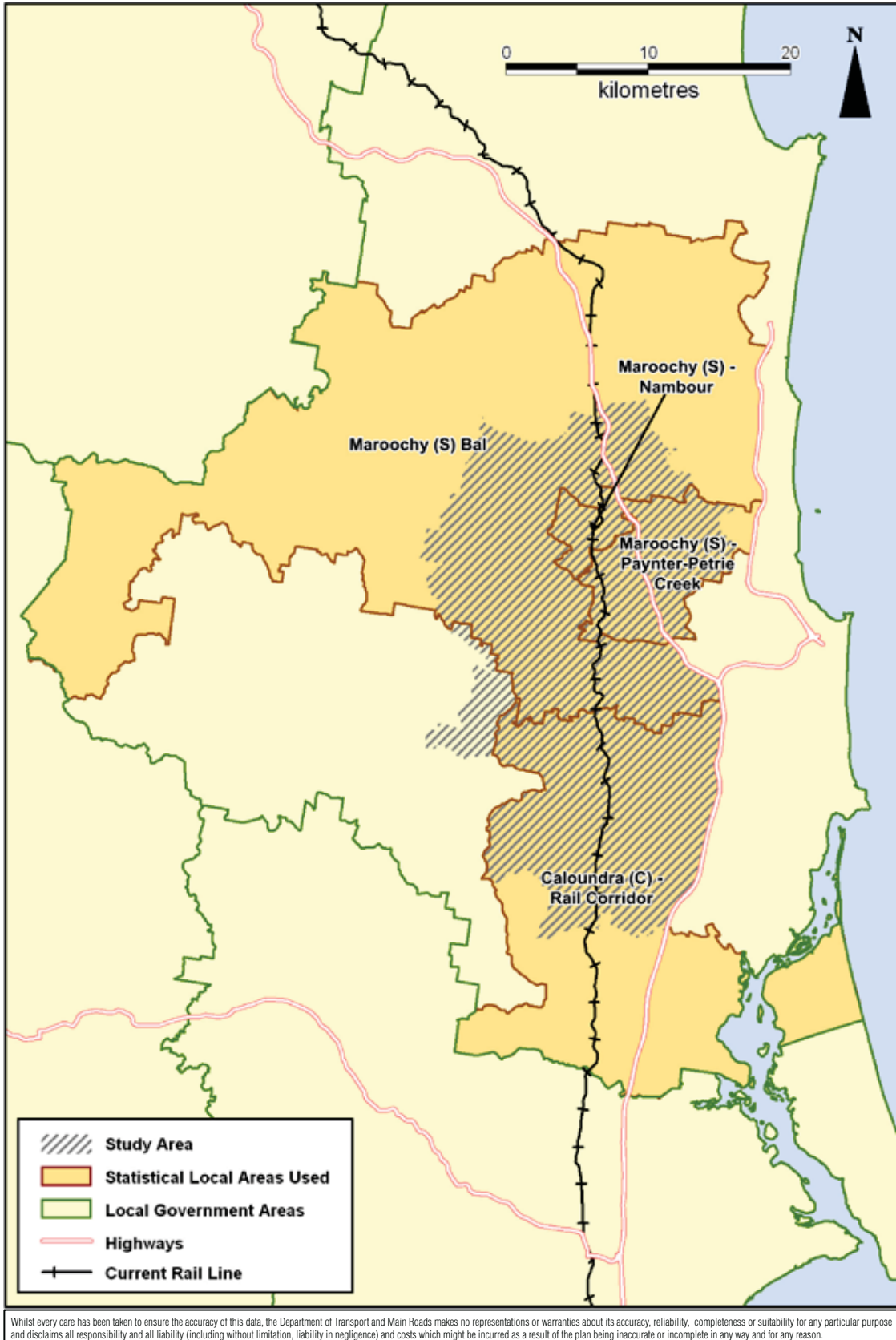
SGS has used economic impact modelling to ascertain the impact of the project on the regional economy. This has been

done on the basis of the SEQ Region, as this is considered to be the area of most significance (i.e. the most relevant area in terms of sourcing goods and services, and the flow on spending). It is also expected that this area would be the best to consider in terms of employment for the project and accommodation of workers.

While the economic impacts are best considered at a regional level, it is also important to consider micro impacts and benefits (i.e. at a township level) and State wide impacts and benefits. SGS has therefore also included a qualitative analysis of the project's impacts and benefits at a township and State level.

Where data (such as Small Area Labour Market Reports) is unavailable down to the CD level, a conglomeration of Statistical Local Areas (SLAs) has been used, which is as close as possible to the study area. The SLAs defined are Maroochy (S) – Nambour, Maroochy (S) Bal, Maroochy (S) – Paynter-Petrie Creek and Caloundra (S) – Rail Corridor. Figure 8.1b shows the difference between the study area and the SLA boundaries.

Figure 8.1b: Alternate demographics study area



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## Mitigation and enhancement strategies

Taking into account the potential economic benefits and impacts, SGS has considered various options for mitigation of impacts or enhancement of benefits associated with the proposal. Such strategies provide options for maximising the benefits and minimising adverse impacts to provide the best economic outcomes. However, such strategies will need to be considered in conjunction with impacts and benefits in other areas (i.e. ecological, social, heritage).

### 8.1.4 Policy context

#### Economic development policy

A review of relevant local and regional economic strategy and policy documents is included here to confirm the policy environment impacting upon the economic development of Brisbane's northern region and the Sunshine Coast as a result of the proposed rail corridor upgrade. In turn, these policy settings will be considered in broad terms for how they might influence potential (and preferred) transport solutions. Key regional documents reviewed and interpreted for their influence on the region's 'future economy' include:

- *South East Queensland Regional Plan (2005 – 2026)*
- *South East Queensland Infrastructure Plan and Program (2008 – 2026)*
- *Queensland Smart State Strategy 2005-2015*
- the State Government's 'Leading Smart Regions' program
- the Sunshine Coast Regional Economic Development Strategy
- *Maroochy Economic Plan 2004 – 2009*
- *Caloundra City Enterprises Economic Directions Strategy*
- Maroochy Shire Strategic Land Needs Analysis
- *Noosa Council Economic Strategies and Innovations Implementation Strategy 2004-2007.*

Contextual understanding of the economic development policy framework was developed through the review and interpretation of regional strategies and policy statements that directly affect the project.

#### Implications of policy context

The review of the economic development policy context (see following section for full details) has highlighted the following key considerations:

- importance of transport and freight networks to future economic prosperity
- importance of key centres and the need to provide efficient linkages between them (including Nambour, Maroochy, and Caloundra)
- the need for efficient and desirable means of connecting people to work

- importance of connections physically and through communications technology
- emphasis on industry clusters
- need to develop industrial land
- focus on creative, knowledge based industries, and research and learning
- key locations identified as Nambour (health and education), Blackall Range (tourism and rural economy), Forest Glen (manufacturing and design), and Yandina (advanced design and manufacturing).

The policy context highlights the growth of the region and the need to ensure that appropriate infrastructure is in place to facilitate such growth. It also highlights a changing economy, in the process of shifting from primary industries and population driven growth, to industry, manufacturing, value adding, and a knowledge based economy.

It should be considered how rail corridor towns can best position themselves to take advantage of the changing economic environment through their locational advantages, access via the rail, and changes in the rail corridor.

At a State level the policy highlights the need for efficient passenger and freight networks, and connecting people to activity centres for work, services and social interaction. Similarly connections between activity centres are important. This report will examine at a broad level some of the benefits of the project in terms of travel time savings and freight improvements.

#### Employment and procurement policy

The State government has a number of policies relating to employment, training and procurement which are applicable to major projects. These policies are outlined in this section.

##### *'10% Training Policy' for Queensland government building and construction contracts*

The 10% Policy is an initiative established by the Queensland government to maximise the ability of Queensland government capital works projects to address skills shortages and create additional employment opportunities for apprentices, trainees and cadets in the building and construction industry.

The 10% Policy requires that:

*'A minimum of 10% of the total labour hours on any Queensland government building or civil construction project (over \$250,000 for buildings or \$500,000 for civil construction) be undertaken by apprentices, trainees or cadets and through the upskilling of existing workers to a maximum of 25% of the deemed hours.'*

It is also required that trainees, apprentices, cadets or existing workers are involved in structured training that has been approved and leads to a nationally recognised building and construction qualification or certificate of attainment. This policy is a mechanism to provide on-site training opportunities.

The policy must be complied with by both Queensland government agencies and contractors that tender for government projects. Strict mechanisms, such as recording and reporting baselines, are identified within this policy to ensure that both bodies incorporate this policy into construction practices. Compliance with this policy is predominately monitored by the Department of Education and Training.

A key mechanism identified within this policy is the use of a Skills Development Plan for major civil construction projects over \$100M in total. This plan would ensure that the training required to develop the skills of workers is identified. Another key mechanism identified within this policy is the training coordinator. The training coordinator acts to facilitate the use of a Skills Development Plan in major project by addressing the barriers and impediments to successful training within specific projects.

The 10% Policy is used in conjunction with the State Purchasing Policy and the Queensland Code of Practice for the Building and Construction Industry. These two documents aim to ensure that employment and economic growth is developed within Queensland in a way that is conducive to best practice principles for the industry.

It is necessary that the construction of the project complies with the 10% Policy at all stages of development. In doing this, the development will ensure that the skills base within the building and construction industry within Queensland is improved.

#### *The Indigenous Employment Policy - The '20% policy'*

The Indigenous Employment Policy, or the 20% Policy, is similar in theory to the 10% Policy for skill development. The 20% Policy requires that:

*'Contractors are to ensure that employment or accredited training occurs on Queensland Government building and civil construction sites to a minimum level of 20% of the total labour hours of a project in a specified Indigenous community. This work is to be undertaken by Indigenous people recruited from the local community in which the project is occurring.'*

The aim of this policy is to maximise employment opportunities within Queensland building and construction projects as well as addressing the skills shortages within indigenous communities. The policy also aims to increase indigenous communities' capabilities to participate within building and construction projects in the future. Indigenous communities include both Aboriginal and Islander communities within the Queensland region.

A number of parties must comply with this policy to ensure it is successfully implemented into large scale projects in indigenous communities. Government departments, recipients of building and construction grants equal to or over \$100,000, as well as contractors who successfully tender projects, are subject to the conditions within the 20% Policy.

Within this policy, a number of implementation guidelines have also been established. From these guidelines, this policy must be adhered to at all stages of the development timeline. A key strategy within this policy is including high levels of consultation within indigenous communities, facilitated by the Department of Education and Training.

Compliance with the 20% Policy ensures that indigenous employment opportunities are increased. Incorporating the element of indigenous employment within building and construction project in identified indigenous communities ensures that the indigenous skill base of the area is improved, thus increasing the opportunity for community members to enter the workforce. This has a direct effect by decreasing unemployment rates.

The 20% Policy is not applicable within the Landsborough to Nambour region. The policy specifies the relevant indigenous communities none of which is included within the Landsborough to Nambour study area (the nearest being Cherbourg in the South Burnett). Building and construction projects within the area are not bound by the mechanisms outlined within the 20% Policy for indigenous employment.

#### *Local Industry Policy - Department of Employment, Economic Development and Innovation*

The Local Industry Policy is a policy established to support the recognised benefits of local participation (goods and services) in major resource and infrastructure projects. It has been established that local participation provides economic benefits to both the Queensland government and the project proponent. Under this policy, it is required that a Local Industry Participation Plan is developed for specific projects.

Local Industry Participation Plans are required for projects that are government funded in excess of \$5 million and major projects in which the government has provided a significant contribution. These plans are to identify, and clearly outline, the project proponent's commitment to the Local Industry Policy. These plans are to specify how local industry participation will be maximised during the life of the project.

During the development of a Local Industry Participation Plan, a number of criteria should be considered, as specified by the Local Industry Policy. These criteria include:

- development of a long-term, internationally competitive industry in Queensland and Australia
- employment, training and skills development
- regional development initiatives
- value-added activity
- opportunities for participation by small business
- existing industry development activity and proposed new investment
- innovation, research and development.

Under this policy, the Industrial Supplies Office takes a significant role in ensuring that the Local Industry Participation Plan is implemented effectively. The Industrial Supplies Office assists with the identification of competitive local suppliers for the purpose of increasing opportunities for import replacement activities. The Industrial Supplies Office is a key mechanism able to be utilised by the project proponent to ensure that local industry participation is maximised at all opportunities.

There is a high level of relevance of this policy to the project. Under this policy, it is necessary to utilise local industrial resources within the development and upgrade of this rail corridor. According to this policy, it will be necessary to coordinate the development of a Local Industry Participation Plan to ensure that local participation to the highest possible extent; thus fulfilling the overall aim of the policy.

The Local Industry Policy plays an important role in supporting the Queensland economy through the utilisation of local industrial resources for large scale building and development projects.

### **8.1.5 Planning scheme review**

The study area is controlled by two planning schemes which applied to the former local government areas (LGAs) of Maroochy and Caloundra. The project area is now contained within the Sunshine Coast Regional Council LGA. The two relevant planning schemes provide detailed planning direction for each of the towns within the study area. While significant infrastructure projects may lead changes in strategic planning and land use the planning schemes provide key information on existing character and land uses and significant features. It should also be noted that each LGA is required to prepare a Local Growth Management Strategy (LGMS) in response to the population targets and Desired Regional Outcomes of the SEQ Regional Plan. Details of the LGMS relevant to the study area are contained within this Section.

#### **Summary of planning scheme intent**

The following Table 8.1.5 provides a summary of the planning scheme provisions relevant to economic development and economic impact assessment of the rail corridor upgrade. In general intended growth is limited and must to be consistent with existing character, particularly in the smaller towns. Economic activity is focused on local retail, services, and business, with limited industry. Industrial areas are intended to develop at Forest Glen and Yandina, while Nambour also has a number of existing industrial areas which may develop further. As the most significant centres Nambour and Beerwah are expected to experience the most development. More detailed information is provided in the following sections. The table also includes current Local Growth Management Strategies for each town and details of Council's more recent comments during consultation relevant to this project.

Table 8.1.5. Local government intent summary

Location	Planning Scheme Key Role	Employment	Employment Expansion	Strategic Plan/ Vision	LGMS Intent	Council Consultation (not Council Policy)
Beerwah	Planning Scheme - Businesses and Industry Area, and District Business Centre SEQ Regional Plan - Major Regional Activity Centre and Commercial/General Economic Activity Area	Retail and business centre Industrial area (along with Landsborough this will serve the hinterland)	Within existing centre Within existing industrial centre Link with CAMCOS	Principle hinterland centre Mixed use development around north coast line Growth in home based business Value added rural industries and protection of Good Quality Agricultural Land Natural and Rural character as base for economic prosperity in the LGA	4000 additional residents by 2026 1800 additional dwellings by 2026 155ha identified greenfield areas for low and mixed density Industry and Enterprise Area identified as an area for growth and regional economic strength	
Peacheater	Planning Scheme - Local centre	Local retail and business	Home based businesses Bed and Breakfast Rural holiday accommodation Rural services	Distinct and discrete centre for local business and community uses Growth in home based business Value added rural industries and protection of Good Quality Agricultural Land Natural and Rural character as base for economic prosperity in the LGA	Not Applicable	

Table 8.1.5 continued

Planning Scheme		Employment		Employment Expansion	Strategic Plan/ Vision	LCMS Intent	Council Consultation (not Council Policy)
Location	Key Role	Employment	Employment	Employment Expansion	Strategic Plan/ Vision	LCMS Intent	Council Consultation (not Council Policy)
Mooloolah	Planning Scheme - Local centre	Local retail and business (lower order only)	Local retail and business (lower order only)	Home based businesses, bed and breakfast, and other complementary uses Expansion of local business services within existing precinct	Distinct and discrete centre for local business and community uses Growth in home based business Value added rural industries and protection of Good Quality Agricultural Land Natural and Rural character as base for economic prosperity in the LGA	77ha identified greenfield area for residential development Development to be low density to maintain the rural town character and identity	Concerns over resumption of commercial area east of the proposed rail corridor Opportunity to develop state-owned land into commercial/open space/ community use Need better ecological outcomes for the Mooloolah River crossing Opportunities exist to integrate the railway into the community Collaboration between all parties to ensure best design outcomes Proposed road over rail options should have safe access for horse floats Integration of the preferred route to the urban form is needed
Maleny	Planning Scheme - District centre	District level retail and business Small to medium rural service industries, service trades and transport storage Low scale tourism	District level retail and business Small to medium rural service industries, service trades and transport storage Low scale tourism	Expansion of local business services within existing precinct	Distinct and discrete centre for local business and community uses Growth in home based business Value added rural industries and protection of Good Quality Agricultural Land Natural and Rural character as base for economic prosperity in the LGA	200ha of greenfield residential development within the 'Maleny Community Precinct Greenfield Area' Maleny activity centre to accommodate 12,000sqm floorspace by 2026	Integration of the preferred route to the urban form is needed

Table 8.1.5 continued

Location	Planning Scheme		Employment Expansion	Strategic Plan/ Vision	LCMS Intent	Council Consultation (not Council Policy)
	Key Role	Employment				
Palmwoods	Planning Scheme – Village Centre	Local retail and business Small local service industrial area to complement business centre	Home based businesses, bed and breakfast, and other complementary uses Expansion of local business services within existing precinct	Palmwoods remains a small country town The town will retain a compact centre providing a focus for community and commercial activity Tourism and industry will remain relatively small scale and low key	Maintain character as a small country town Range of goods and services New residential development is expected Older parts of the area are to be retained for character and amenity	Operating speed over 100km/h is a concern High community value placed upon duck pond Concerns over the sound barrier Railway should be a slimline structure so to ensure it would not dominate the township Old rail network could be a future road/ bike/ pedestrian network solution A village green or 'railway square' can be developed next to the station Limited commercial development in the future
Eudlo	N/A	Local retail and business Forest Glen business and industry area	Growth in Forest Glen industrial/ business area Consolidation of existing areas of low-key, land intensive tourist facilities	Eudlo Creek Valley is intended that to maintain a predominantly rural landscape, accommodating a range of rural activities, rural residential development, conservation parks, extractive industry, the small country township of Eudlo, low-key tourist facilities, and a business and industry node at Forest Glen.	Rural landscape area Supports rural activities, low density residential development, conservation parks, extractive industry and low-key tourist facilities Business and industry node to be located at Forest Glen	Potential to rehabilitate existing rail corridor into a tourist link or rail trail Community or tourism opportunities are preferred in Eudlo rather than commercial opportunities Existing railway station could be used as an art gallery/ restaurant/ cafe Shops to have better connectivity to the railway station Eudlo's Urban Footprint has limited opportunity for expansion due to flooding Rail trails would be a benefit in Eudlo due to scenic landscapes and high numbers of horses

Table 8.1.5 continued

Planning Scheme		Employment		Employment Expansion	Strategic Plan/ Vision	L/GMS Intent	Council Consultation (not Council Policy)
Location	Key Role	Employment	Employment	Employment Expansion	Strategic Plan/ Vision	L/GMS Intent	Council Consultation (not Council Policy)
Woombye	Planning Scheme – Village Centre	Rural service centre limited to lower order goods and services	Rural service centre limited to lower order goods and services	Redevelopment and consolidation of local business and tourist services within existing precincts	It is intended that Woombye be a place which maintains and strengthens its individual identity (separate from Nambour) and develops a distinctive town centre, which encourages relaxed activity and caters for all groups within the community.	Maintain rural character and identity Low density single detached dwellings to continue as residential development occurs	Connectivity of the township requires long-term planning Concern raised over affected sporting fields Woombye has network issues Opportunity exists for a retail precinct near the station Nambour Connection Road is the only major route from Nambour to Woombye Opportunity exists to make Memorial Park a focal point of the town Opportunity for fine grain mixed use development located next to the railway station Opportunity for using Hill Street as another access to and from Nambour Existing railway corridor could be used as a new road/ pedestrian/ cycle network Opportunity to provide short term parking in Woombye
Mapleton	N/A	Small scale retail, business, tourist and community uses (main service centre for Blackall Ranges) Low intensity rural based tourism Small scale tourist accommodation	Small scale retail, business, tourist and community uses (main service centre for Blackall Ranges) Low intensity rural based tourism Small scale tourist accommodation	Consolidation of existing uses	Mapleton will remain a small hinterland residential community centred around a compact village centre. The village centre will provide only lower order goods and services, sufficient to fulfil the day to day needs of residents of the village and the rest of the Blackall Range. It is intended that Mapleton will retain its small, compact form and its informal but engaging character.	Not Applicable	

Table 8.1.5 continued

Location	Planning Scheme	Employment	Employment Expansion	Strategic Plan/ Vision	LGMS Intent	Council Consultation (not Council Policy)
Montville	N/A	Small scale retail, business, tourist and community uses Low intensity rural based tourism Small scale tourist accommodation	Consolidation of existing uses	Montville will remain the focus for tourism on the Blackall Range and will retain its village character and charm. Small scale retail and service enterprises which draw upon and/or complement the rural tourism character of the village will continue to locate here.	Not Applicable	
Nambour	Planning Scheme – Major Activity Centre SEQ Regional Plan – Major Regional Activity Centre and Commercial/General Economic Activity Area	Regional Centre for higher order goods and services to hinterland and rural parts of Maroochy Shire. Hospital and associated uses Education (TAFE, primary and secondary schools) Industry Administration including State and Commonwealth government agencies	Building on existing services and uses	It is intended that Nambour will be a major activity centre, providing higher order goods and services to the hinterland and rural parts of the region. It will also provide a focus for a number of important industry and administration activities as well as accommodating the headquarters of a number of rural focussed State and Commonwealth government agencies. The town centre will be the focus for business activity providing a range of services to the surrounding areas. It is envisaged that the Town Centre will be a vibrant and active node encouraging community interaction. The existing facilities and Nambour's accessibility to Brisbane, offered by an electric rail system and road linkages, contribute to the liveability of this Planning Area.	Major Activity Centre Role to provide higher order goods and services Mixed housing to be provided Important industry, government and administration activities to also occur in the area	

Table 8.1.5 continued

Location	Planning Scheme Key Role	Employment	Employment Expansion	Strategic Plan/ Vision	LGMS Intent	Council Consultation (not Council Policy)
Yandina	Planning Scheme – N/A SEQ Regional Plan – Bridges Investigation Area	Local business centre Significant industrial land Tourism based on rural processing industries and boutique tourist ventures	Expansion of business centre including future new supermarket Broader industrial base in existing industrial areas Growth in tourism	It is intended that Yandina will be a small, friendly and prosperous country town which is attractive to tourists and where a caring and active community works together to provide its hinterland with local services and facilities, in a relaxed village atmosphere, set in green open space.	Not Applicable	

## 8.2 Socio-demographic and economic baseline

### 8.2.1 Demographic data and study area

This section of the report provides a broad demographic summary of the study area and demographic and social environments of the six communities that are directly affected by the proposed rail corridor (Landsborough, Mooloolah, Palmwoods, Woombye and Nambour). It outlines the current socio-economic make-up of the study area, and the current accommodation situation, relevant to assessing the potential economic impact of the project. The information presented in this section is sourced from the ABS Census data unless otherwise noted.

While the study area identified in the terms of reference for the project is three kilometres wide, the social and economic impacts of the project are considered to be more widespread. Therefore the study area for the purpose of this SGS study has been defined using an aggregation of Census Collection Districts within an approximately 10 kilometre radius of the proposed rail corridor and takes in the Blackall Range tourist area. The spatial extent of the the study area was determined taking into account the likely distance train commuters would travel to access the north coast line service. The study area includes communities likely to experience primary impacts (e.g. communities along the rail corridor) as well as communities that lie outside of the corridor but are likely to receive secondary impacts (see Figure 8.1b) of this Economic Impact Assessment, however only the communities on the rail corridor are examined in detail in this report. The study area includes the following 11 communities:

#### Primary impact

- Nambour
- Woombye
- Palmwoods
- Eudlo
- Mooloolah
- Landsborough.

#### Secondary impact

- Maleny
- Peachester
- Yandina
- Mapleton
- Beerwah.

Throughout this economic impact assessment, references are made to the Landsborough to Nambour Study Area (study area), which comprises all 11 communities identified. The study area including the 11 communities are shown in Figure 8.1b.

### 8.2.2 Demographic and social summary for the study area

The key issues and trends emerging from the baseline data for the study area include:

#### Population

- The study area has a population of 54,702 at the time of the 2006 Census. This accounted for 19.8% of the population for the whole of Sunshine Coast.
- The study area has a lower annual average growth rate over the 2001-2006 period when compared to the rest of the Sunshine Coast (2.2% compared to 3.3% for the former Caloundra LGA, 2.4% for the former Maroochy LGA and 2.5% for SEQ). This is shown in Table 8.2.2a.
- According to the planning studies conducted for the former Caloundra and Maroochy LGAs, the majority of forecast population growth over the next 20 years will occur in the coastal areas (which are outside the study area), and relatively large population increases are expected for two hinterland localities in the study area (Nambour and Beerwah). Nambour and Beerwah are designated as Major Activity Centres under the SEQ Regional Plan.
- The changes noted between the 2001 and 2006 Censuses showed that the study area has an ageing population in line with the trends for the Sunshine Coast region.

Table 8.2.2a: Average annual population change, study area, Caloundra LGA, Maroochy LGA, SEQ and Queensland, 2001-2006

	Study Area	Former Caloundra LGA	Former Maroochy LGA	SEQ	Queensland
Population 2001	49,113	74,393	126,745	2,372,104	3,585,639
Population 2006	54,702	87,597	142,839	2,680,531	3,904,532
Change from 2001 to 2006	5,589	13,204	16,094	308,427	318,893
% Average Annual Change	2.2%	3.3%	2.4%	2.5%	1.7%

Source: ABS Census of Population and Housing, 2001 and 2006

### Forecast population change

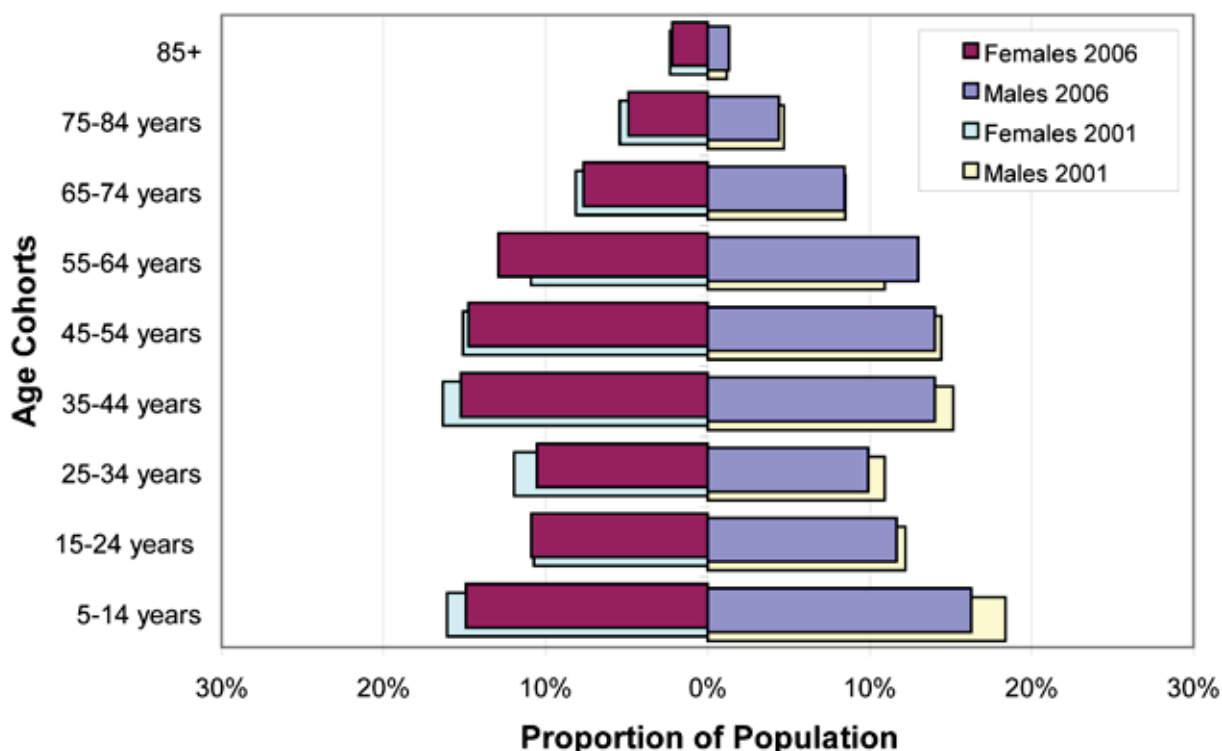
- Average population growth in both former LGA areas (2.92% and 2.48%) is anticipated to be higher than in wider SEQ (1.74%), as shown in Table 8.2.2b.
- Highest levels of growth are predicted between 2001 and 2016 for all areas.
- Due to limited data availability, former LGA areas were used to generate population growth projections.

Table 8.2.2b: Average annual population change, former Caloundra and Maroochy LGA's, 2006-2021

	Former Caloundra LGA	Former Maroochy LGA	SEQ
2006	4.1%	3.7%	2.6%
2011	3.3%	2.3%	1.9%
2016	3.6%	2.9%	1.9%
2021	2.7%	2.5%	1.7%
2026	2.1%	2.2%	1.5%
Avg. Growth	2.92%	2.48%	1.74%

Source: Queensland Government's Planning Information and Forecasting Unit, 2007

Figure 8.2a: Age/sex structure, study area, 2001 and 2006



Source: ABS Census of Population and Housing, 2001 and 2006

### Indigenous profile

Within the study area, 1.7% of the population identified themselves as being of Indigenous descent in the 2006 Census. This was slightly lower than in south east Queensland, where 1.8% of all respondents nominated as being of Indigenous descent.

### Age and sex structure

- Figure 8.2a represents the age/sex structure of the study area for both the 2001 and 2006 census dates. A large proportion of the population is aged between 35 and 54 years of age. The two age cohorts representing this large proportion are the 35-44 years of age and the 45-54 years of age cohorts.
- It is also noted that the population is aging. This is represented by a relatively large proportion of people within the older age cohorts in 2006 compared to 2001.
- A significant number of people are within the 5-14 years of age cohort, most probably representing the offspring of people within the 35-54 age cohorts.

### Household composition and size

- Couple families with children were the dominant family type across the study area. This was closely followed by couple families without children and one parent families. The study area's pattern of household composition was similar to that of SEQ and Queensland.
- The study area has the same average household size as SEQ (2.7 persons per household). However, there are generally a higher proportion of two person households in the study area compared to SEQ and Queensland, indicating that both larger families and couples without children are present in the study area.

### Dwelling type and tenure

- The study area has high levels of home ownership (35.3% of dwellings are fully owned and 38.4% of dwellings being purchased) compared to SEQ (30.6% fully owned and 35.9% being purchased). Subsequently, there were low rates of rental tenure in the study area (20.7% of total dwellings) compared to SEQ (27.6%).
- Separate dwellings were the dominant type of dwelling in the study area, with low proportions of semi-detached and attached dwellings (i.e. units, apartments, townhouses and duplexes) when compared to SEQ.

### Transport

- Households in the study area were automobile dependent, with very low levels of public transport used as a main mode of travel to work.

## 8.2.3 Economic environment of the study area

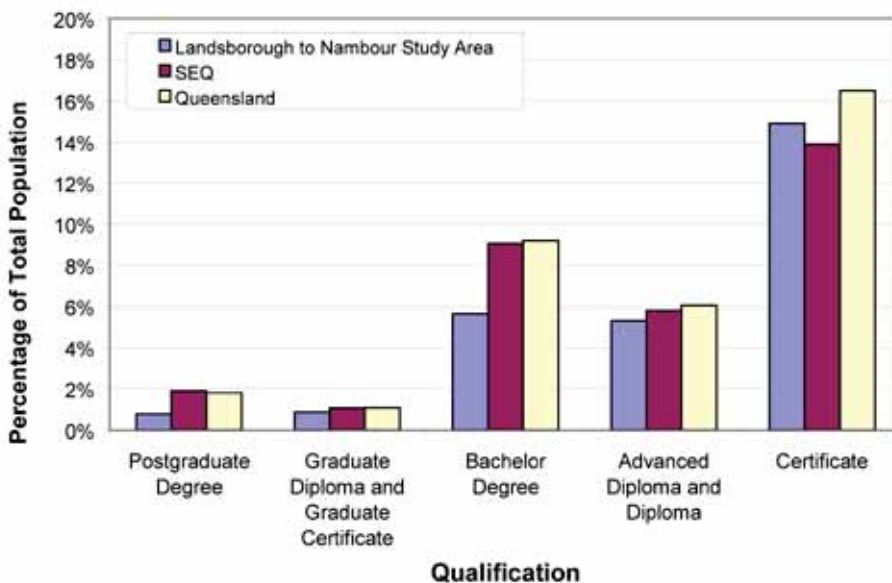
### School attendance and educational attainment

- The study area has a high proportion of residents currently attending primary (33.9% compared to 28% for SEQ) and secondary schools (23.5% compared to 19.6% for SEQ) but low proportions of residents attending TAFE and University (12.2% compared to 19.6% for SEQ). The relatively low level of tertiary education attendance for the study area is likely due to the relatively fewer tertiary education course opportunities in the study area (compared to Brisbane for example) and the fact that students may move from the study area to undertake such studies in, for example, Brisbane or further afield.
- The level of educational attainment is low for the study area compared to SEQ and Queensland, with the exception of Certificate qualifications. This may be due to the relatively lower level of employment in the areas of managers, professionals, and clerical and administration workers.

### Tertiary qualifications

- The study area has a lower proportion of residents with a tertiary qualification compared to SEQ and Queensland. According to the 2006 Census, 5.6% of the population in the study area held a bachelors degree, almost half the proportion of SEQ residents with the same qualification (9.1%) and similarly, Queensland (9.2%).
- The proportion of the study area population with a certificate qualification was (14.9%), slightly higher than SEQ (13.9%) but lower than Queensland (16.5%). Other educational qualifications are presented in Figure 8.2b.

Figure 8.2b: Tertiary qualifications, study area, SEQ and Queensland, 2006



Source: ABS Census of Population and Housing, 2006

## Unemployment

- Unemployment figures were obtained from Small Area Labour Market Reports for the SLAs of Maroochy (S) Bal, Maroochy (S) Nambour, Maroochy (S) Paynter-Petrie Creek and Caloundra (C) Rail Corridor. These areas are the most similar to the study area boundary of all census collection areas, exclude coastal urban areas and allow for regular (quarterly) updating of employment data.
- Unemployment currently sits at 1,648 people according to Small Area Labour Market Reports. This equates to 4.14% of the total labour force. It should be noted that the latent skills of unemployed workers could be significantly different at the time the project commence.
- Additional space included within SLAs areas that is not also included within the study area boundary is predominately rural land and does not capture any major additional employment areas. Therefore, the stated unemployment is considered reasonably representative of the study area.

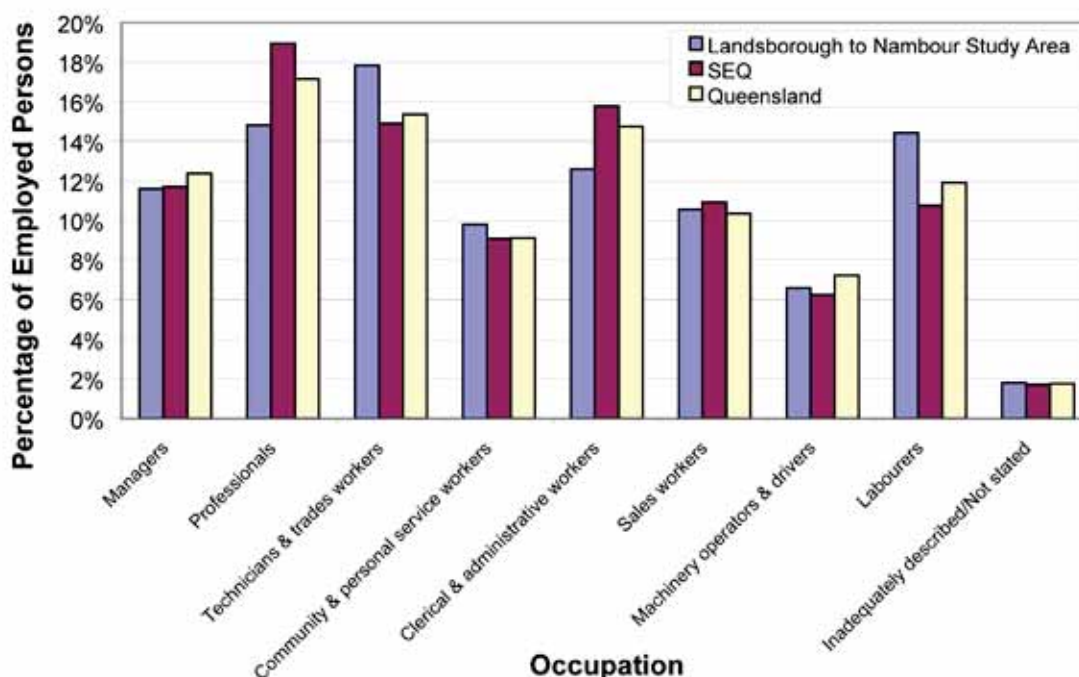
## Occupation

- Nearly one fifth (18%) of all people employed in the study area worked as technicians or trade workers. Other occupational groups with a high proportion within the study area included professionals and labourers. Although the professional occupation group is the second largest by

proportion in the study area, it is well below the proportion of professional employees in SEQ and Queensland (where in both cases it is the highest proportion of occupations).

- Proportions of lower order, labour orientated jobs were higher in the study area when compared to SEQ and Queensland whilst professional and knowledge orientated jobs accounted for a lower share of total employed persons compared with SEQ and Queensland. This may be related to the lower proportion of university educated persons, fewer employment opportunities in professional occupations in the area and the higher level of certificate based tertiary education achieved by residents when compared to SEQ. Queensland has both higher levels of university and certificate trained residents.
- Proportions of persons employed as trade workers in the study area accounted for 17.8% of total jobs which was higher than 14.9% in SEQ and 15.4% in Queensland.
- Labourers also accounted for a higher proportion with 14.4% of total employed persons working in this occupation compared to 10.8% in SEQ and 11.9% in Queensland.
- Proportions of professionals accounted for 14.8% in the study area compared to 18.9% in SEQ and 17.1% Queensland. Similarly, proportions of clerical and administrative workers were also lower (see Figure 8.2c).

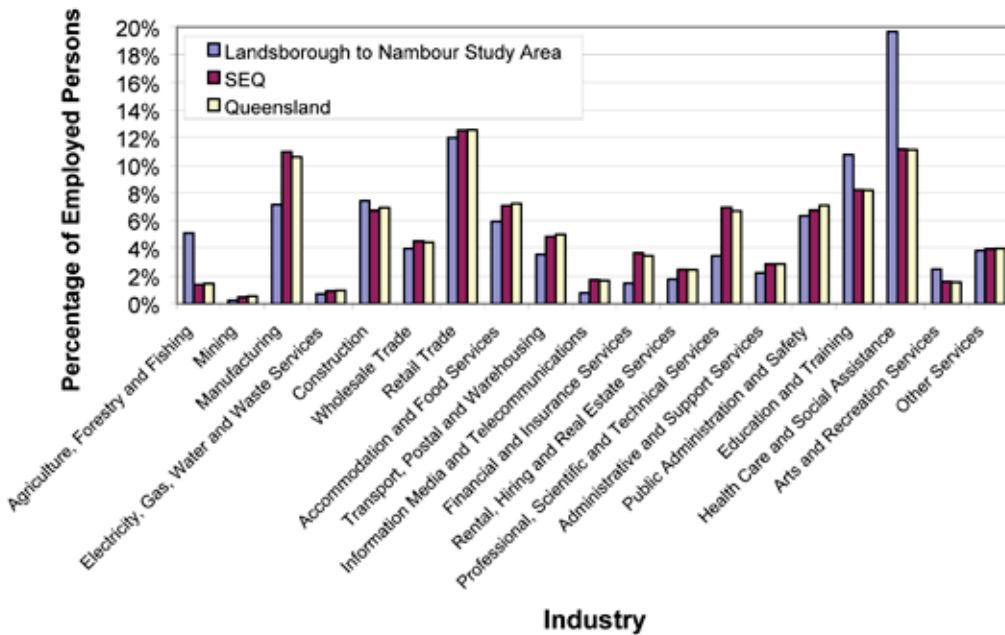
Figure 8.2c: Occupation structure, Landsborough to Nambour study area, SEQ, Queensland, 2006



Source: ABS Census of Population and Housing, 2006

- Figure 8.2d represents the proportions of persons employed within respective industries based on place of work rather than place of usual residence. The greater prevalence of primary and service industry jobs is consistent with the rural context and the exclusion of the more densely populated coastal regions in Caloundra and Maroochydore from the study area, which are likely to contain greater employment in knowledge based industries.

Figure 8.2d: Distribution of employed persons by industry based on place of work, study area, SEQ, Queensland, 2006



Source: ABS Census Journey to Work Data, 2006

### Employment self sufficiency

- It was determined that the study area had an employment self sufficiency ratio of 87.76% with approximately 16,916 jobs in the area and 19,275 employed residents. Employment self sufficiency is a measure of the total number of jobs in a region over the employed residents in the region and, thus, accounts for journey to work movements (residents leaving the region for work and employees entering the region for work). This is shown in Table 8.2.3a.
- The self-containment rate for the study area is 66%, and is a measure of employed residents who live and work in the region over the total number of employed residents. There were 12,741 residents of the study area working in the study area.
- It is noted that there is a large number of residents employed in the mining industry compared to how many jobs are available within the study area. This is identified by the very low self sufficiency ratio in that sector of 29.55%.
- As expected for a predominantly rural area self sufficiency in the area of 'agriculture, forestry, and fishing' is 113.5% indicating more jobs than residents employed in this industry.
- Other areas of relatively strong (greater than 100%) employment include 'public administration and safety', 'education and training', 'health care and social assistance', and 'arts and recreation services'. This is consistent with the area including council offices, Nambour Hospital, and a number of major schools and TAFE in Nambour.

Table 8.2.3a: Self sufficiency ratio by journey to work, industry category (one digit)

Industry	Self Sufficiency
Agriculture, Forestry and Fishing	113.50%
Mining	29.55%
Manufacturing	54.56%
Electricity, Gas, Water and Waste Services	91.54%
Construction	50.08%
Wholesale Trade	91.99%
Retail Trade	79.69%
Accommodation and Food Services	66.69%
Transport, Postal and Warehousing	78.12%
Information Media and Telecommunications	66.67%
Financial and Insurance Services	80.80%
Rental, Hiring and Real Estate Services	77.01%
Professional, Scientific and Technical Services	79.03%
Administrative and Support Services	55.43%
Public Administration and Safety	133.01%
Education and Training	124.18%
Health Care and Social Assistance	143.12%
Arts and Recreation Services	157.28%
Other Services	82.52%
Inadequately described/Not Stated	35.83%
Total	87.76%

Source: ABS Census Journey to Work Data, 2006

#### Income

- The median weekly household income does not differ significantly between study area localities, with all localities, apart from Landsborough, having a median household income of \$800-899. Landsborough households had a slightly lower median income of \$650-799 per week. These figures were all considerably lower than the SEQ median weekly household income figure of \$1,000-1,199.
- The median income for residents of each of the relevant townships assessed by this study is outlined in Table 8.2.3b. The data indicates that, in 2001, all the study area towns, except Palmwoods, had a lower median individual income than the comparable regions of either SEQ or Queensland. However, in 2006, Mooloolah, Eudlo and Woombye had a median weekly individual income the same as Queensland (\$400-\$599) and the remainder reported a median weekly individual income of \$250-\$399, which was the same as SEQ.

- The median weekly individual incomes for Woombye, Eudlo and Mooloolah have increased the most, compared with other rail corridor towns. It is considered that this could be likely due to rural residential development in the areas and tree-change population growth bringing a more diverse income profile to the townships.

Table 8.2.3b: Median weekly individual income, study area, SEQ and Queensland, 2001 and 2006

Area	2001	2006
Nambour	\$200-299	\$250-399
Woombye	\$200-299	\$400-599
Palmwoods	\$300-399	\$250-399
Eudlo	\$200-299	\$400-599
Mooloolah	\$200-299	\$400-599
Landsborough	\$200-299	\$250-399
Peachester	\$200-299	\$250-399
Yandina	\$200-299	\$250-399
Mapleton	\$200-299	\$250-399
Beerwah	\$200-299	\$250-399
SEQ	\$300-399	\$250-399
Queensland	\$300-399	\$400-599

Source: ABS Census of Population and Housing, 2001 and 2006

#### 8.2.4 Accommodation in the study area

This section describes the current accommodation situation in the study area. Existing and future supply for residential, tourist and short term accommodation have been documented in order to determine the ability of the region to cater for the accommodation requirements during the construction and ongoing operation stages of the project.

##### Residential accommodation

###### Dwelling type and tenure

- Separate dwelling was the dominant type of dwelling in the study area, with low proportions of semi-detached and attached dwellings (i.e. units, apartments, townhouses and duplexes) when compared to SEQ.
- The study area has high levels of home ownership (35.3% of dwellings are fully owned and 38.4% of dwellings being purchased) compared to SEQ (30.6% and 35.9% respectively). Subsequently, there were low rates of rental tenure in the study area (20.7% of total dwellings) compared to SEQ (27.6%). This was also compared with the broader Sunshine Coast area (Sunshine Coast-Bal Statistical Subdivision, Nambour Statistical Local Area and Paynter-Petrie Creek Statistical Local Area) having 20.5% rental tenure.

- The level of 'social'<sup>1</sup> housing (including State or Territory Housing Authority, and Housing Cooperative/community/church group) varies within the area, with the highest being Nambour Statistical Local Area which is 17.4% of all rentals. Paynter-Petrie Creek Statistical Local Area is 11.5% of all rentals and Sunshine Coast (Bal) is 5.2% of all rentals. The rate of social housing for Queensland is 13.4%.
- Up to date residential rental vacancy rates are not available for the study area. The latest REIQ rates do not have figures for Maroochydoore or Caloundra, and the closest figure is for the 'Brisbane Surrounds'<sup>2</sup> which for March 2008 is 2.1% for all rentals, up from 2.3% in December 2007. This compares with the Brisbane 2008 rate of 2.2% for March 2008, up from 2.3% in December 2007, and the Queensland rate of 2.6%, up from 2.3%.
- Table 8.2.4a indicates that vacancy rates for residential dwellings are generally quite low for houses and similar to Brisbane, while units and townhouses are slightly higher which may reflect a market preference for houses.
- Discussions with local real estate agents indicate a tight rental market and this is consistent with current nationwide low levels of rental housing and the low level of rental stock compared with the wider region.

Table 8.2.4a: Rental vacancy rates for the Sunshine Coast and Brisbane LGA

Area	Houses		Unit/Townhouse	
	September 2007	June 2007	September 2007	June 2007
Brisbane LGA	1.7%	1.6%	1.5%	1.3%
Caloundra	1.2%	2.3%	2.2%	2.8%
Maroochydoore	1.7%	1.5%	2.1%	2.4%

Source: REIQ, 2007

### Median prices

- According to the Real Estate Institute of Queensland (REIQ) data, the median house price for the study area ranged between \$288,500 and \$385,000 for urban residential and \$386,000 and \$510,000 for acreage living. At a LGA level median prices were quite similar between Brisbane (\$390,000), Caloundra (\$395,000), and Maroochy (\$388,000).
- The median house price varied within the study area, with Palmwoods Acreage recording the highest median house price (\$510,000) and Nambour recording the lowest median house price (\$288,500).

- 1 Social housing is considered to be housing provided by the government for not for profit groups and for the purpose of this data includes the following categories from ABS rental tenure data; State or Territory Housing Authority, and Housing Cooperative/community/church group
- 2 Consists of the Moreton Bay Regional Council areas and the Logan, Redland and Ipswich City Council areas.

It appears from Table 8.2.4b that housing in towns (vs. acreage) in the study area is generally less than that of Caloundra and Maroochy LGA's. This is most likely because the Maroochy and Caloundra LGAs include the tourism and coastal strip driven property markets.

Table 8.2.4b: Median housing prices, study area locations and LGAs, 2007

Area	12 months to end of March 2007
Yandina	\$290,000
Nambour	\$288,500
Woombye	\$335,000
Palmwoods	\$385,000
Palmwoods Acreage <sup>3</sup>	\$510,000
Mooloolah Valley	\$369,000
Mooloolah Valley Acreage	\$430,000
Landsborough	\$314,500
Landsborough Acreage	\$386,000
Beerwah	\$325,000
Beerwah Acreage	\$410,000
Mapleton	\$365,000
Maleny	\$365,000
Maleny Acreage	\$485,000
Maroochy LGA	\$388,000
Caloundra LGA	\$395,000
Brisbane LGA	\$390,000

Source: Real Estate Institute of Queensland, 2007

### Housing repayment and rental prices

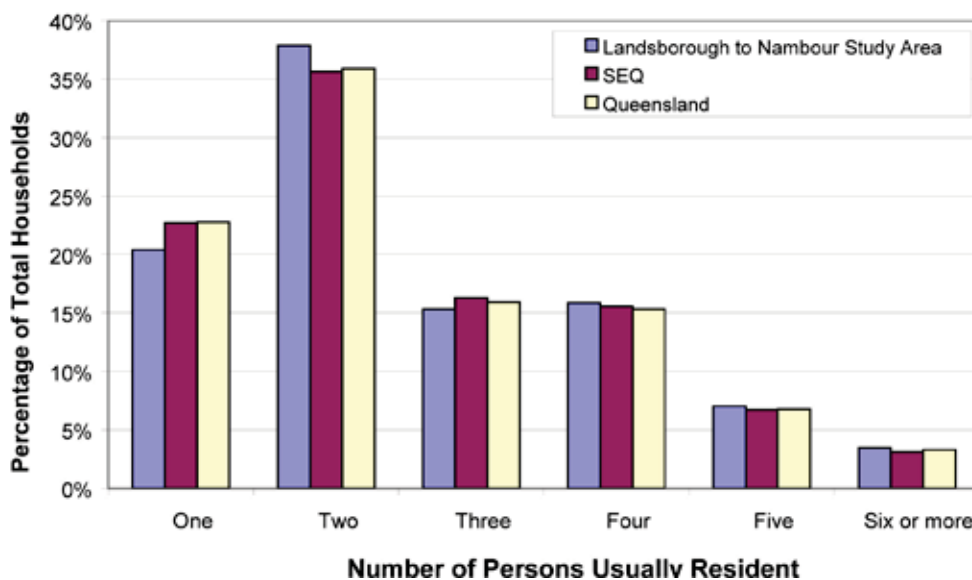
- The median home loan repayment was slightly lower in the study area (\$1,215 per month) than it was in either the former Maroochy or Caloundra LGAs (the median repayment for both LGAs was \$1,300 per month).
- Rental prices in the study area were generally lower for smaller towns, but larger towns had comparable rental prices to Brisbane, Maroochydoore and Caloundra.

### Household size

- Figure 8.2e shows the distribution of population usually resident in all households within the study area, compared with SEQ and Queensland average figures. The data indicates that the study area has a slightly higher proportion of four, five and six or more person households compared to SEQ and Queensland.

3 Acreage refers to land greater than 2,400 sq m

Figure 8.2e: Household size distribution, study area, SEQ and Queensland, 2006



Source: ABS Census of Population and Housing, 2006

- According to the 2006 Census, the average household size for the study area was 2.9 compared to 2.7 for SEQ and 2.8 for Queensland. In terms of two person households, the study area had a higher proportion of two person households (37.9%) in comparison to SEQ and Queensland (35.6% and 35.9% respectively).

### Tourist accommodation

Rail towns along the Landsborough to Nambour rail corridor contain various different forms of tourist accommodation. Accommodation options range from unpowered campsites to exclusive rainforest and mountain retreats. The Sunshine Coast is a popular tourist destination however the hinterland towns, such as those affected by the rail line, are also key destinations in their own right. It is obvious however, that different towns have different levels of available tourist accommodation. The major focus for tourist accommodation is not in the study area, but rather in the coastal strip or further to the west in the Blackall Ranges. Table 8.2.4c summarises tourist accommodation in the study area.

#### Landsborough

There are also many tourist accommodation facilities within the Landsborough area. The most significant form of accommodation within this area is in the form of caravan or cabin parks. Sites within these parks range in price from \$24 to \$105, once again dependant upon room type. There are a large number of sites and cabins available in a number of different establishments within the Landsborough area. Bed and breakfast style accommodation is also provided within this area at a cost of approximately \$99 to \$187 per night, however limited beds are available compared to other towns within the study area.

#### Mooloolah

Accommodation in Mooloolah is primarily bed and breakfast style accommodation. In total, across two different establishments, there are the facilities to accommodate up to 20 people in bed and breakfast establishments. Of these establishments, holiday homes are provided as well as bed and breakfast style accommodation and cost approximately \$145 and \$275 per night. Accommodation within this township is somewhat limited to these two establishments.

#### Eudlo

Accommodation is also somewhat limited within Eulo to approximately two different establishments. One bed and breakfast establishment and one longer term bungalow/villa style accommodation are provided within the area. There are four rooms that sleep up to two people each in bed and breakfast style facilities that cost approximately \$70 to \$125 per night. The more exclusive bungalow and villa establishment offers four different rooms with a maximum of two people in each. This establishment costs approximately \$440 to \$630 for a minimum of a two night stay.

#### Palmwoods

Palmwoods contains three different accommodation options. The largest establishment within the area is caravan/camp site style accommodation. Permanent residents are encouraged within this park however there are a total of 20 sites available for tourists at a cost of \$20 to \$39 per night. There are also more exclusive accommodation establishments in the form of bed and breakfast cottages. In total there are four rooms available in this style at a cost of approximately \$126 to \$220 per night.

### Woombye

Accommodation is also limited within the Woombye area. There are two different accommodation establishments within the Woombye area; one being an inn and the other a motor lodge. In total there are approximately 30 rooms available at a cost of \$92 to \$165 per night.

In summary, bed and breakfast style accommodation is most prevalent within the study area. There are approximately 10 different bed and breakfast establishments within the immediate study area as well as numerous within the surrounding areas of the Sunshine Coast hinterland. Caravan and campsites are also well established within the study area as there are seven different establishments in the rail corridor towns. There are approximately 6 different inns/lodges within the study area and four hotels/motels. Of these establishments, bed and breakfast style accommodation is generally more expensive as it offers a more exclusive form of accommodation when compared to accommodation within caravan or camp parks.

### Nambour

The study area contains various accommodation options that would be suitable for tourists and workers visiting the area. In Nambour, there are numerous different options for tourist accommodation. In this area there are a larger proportion of

motels and apartments compared to accommodation options within other rail towns within the study area. In the Nambour area, there are approximately three specific motels. Within these motels there are generally 19-23 rooms available at cost of approximately \$100 to \$130 per night. Nambour also has bed and breakfast style accommodation available. There are approximately three rooms available within a bed and breakfast establishment within Nambour at a cost of approximately \$210 per night. While there is only one bed and breakfast identified within the immediate Nambour area, multiple bed and breakfast style facilities are located in close proximity in areas such as Maleny, Mapleton and Montville. Budget accommodation is also catered for within the Nambour area in the form of inns, campsites, cabins and bungalows. Budget accommodation in the area, of which there are many options, costs between \$26 and \$130 per night dependant upon room type or site type.

### ABS data summary

While the previous section presented the current situation of permanent accommodation in the study area, this section describes the availability of tourist accommodation with respect to surveys carried out by ABS. The information provided in this section is sourced primarily from the ABS. Due to privacy concerns, a lot of the data for the smaller areas is unavailable.

Table 8.2.4c: Tourist and short-term accommodation indicators summary, Maroochy (S) – Nambour, Maroochy (S) Bal, Maroochy (S) – Paynter-Petrie Creek, Caloundra (C) – Rail Corridor

	Maroochy (S) – Nambour	Maroochy (S) Bal	Maroochy (S) – Paynter-Petrie Creek	Caloundra (C) – Rail Corridor	Total
Hotels, Motels and Serviced Apartments - All – Bedspaces	195				195
Caravan Parks – Sites	1	2	3	3	9
Caravan Parks - All - No of Cabin Flats Units and Villas			39		39
Caravan Parks - All - Bedspaces of Cabin Flats Units and Villas Assuming 2 persons per dwelling			78		78
Number of Hostels	0	0	0	0	0

Source: ABS Tourist Accommodation, small area data, June 2008

### **Potential for future dwellings**

A current indicator of future residential development is contained in the Local Growth Management Strategies (LGMS) for the former Maroochy and Caloundra LGAs. The Caloundra LGMS aims to increase the population of the hinterland townships of Maleny, Mooloolah, Landsborough, Glass House Mountains and Beerburum by 6,000 residents (cf. total 2006 study area population of 54,700) between 2004 and 2026. Greenfield land at Mooloolah and Landsborough has been identified as suitable for development between 2007 and 2015. The Maroochy LGMS does not identify particular development areas, or residential targets. However, the centre of Nambour is identified as a Major Development Area and will presumably include some residential redevelopment. There appears to be reasonable areas available for residential growth within the Urban Footprint as defined by the South East Queensland Regional Plan. However, this is limited by planning scheme constraints, steep slopes, protected vegetation, flood prone areas and current rural residential areas. In keeping with the aims of the SEQ Regional Plan, it is expected that residential development will be focused around existing towns, and a compact urban form encouraged. At the same time, council may allow some larger lot development to satisfy demand for such residential choice in keeping with the environmental attractions of the area.

It is expected that there will continue to be incremental residential development throughout the area (subject to the constraints mentioned), and this is likely to be encouraged by better rail passenger transport. Rising petrol costs and road congestion are factors encouraging the use of public transport. The trend is towards high quality, high frequency transport nodes surrounded by mixed use precincts with a high level of amenity and services. High quality transit oriented developments are expected to experience significant growth and residential investment.

### **8.2.5 Individual community profiles**

This section provides a broad overview of the social and economic characteristics of the six townships that fall into the study area. Specifically, this section will cover the following:

- residential amenity
- community vision
- existing demographic and social environment.

#### **Landsborough**

##### *Residential amenity*

Landsborough is characterised by its historical character with many sites of cultural heritage value located within the township. Functioning as an entrance to the Blackall Range, Landsborough has a business centre catering for residents and tourists.

Residential development in Landsborough is urban with residential areas situated immediately to the north and west of the business centre. The area is characterised by low rise detached dwellings on suburban lots with an exception of the Corella Park residential estate which is intended for allotments of 1,000 m<sup>2</sup>.

Landsborough is connected to reticulated water and sewerage. According to council, these services have the capacity of being extended to new residential areas.

##### *Community vision*

The community vision for the Landsborough township is to maintain its identity as a small rural town and to preserve its historical character and buildings. It is envisaged that Landsborough will continue to be a residential community with the local business centre functioning to service the needs of residents in Landsborough and surrounding areas.

##### *Existing demographic and social environment*

###### *Population*

- The population of Landsborough was 1,576 in 2006. This was an increase of 13.1% compared to the 2001 population figure of 1,393.

###### *Indigenous profile*

- The proportion of Indigenous persons was higher in Landsborough than the study area at 2.4% compared to 1.7%. The share of non-Indigenous persons was similar between Landsborough and the study area at 94.2% and 94.4% respectively.

###### *Household composition and size*

- Landsborough contains a lower proportion of families with no children than the study area with 34.3% of total families falling into this category compared to 39.7% in the Landsborough to Nambour Study Area. Proportions of families with children were similar to the study area however cases of one parent families with children was higher in Landsborough accounting for 20.1% whereas this figure was only 15.7% in the study area.
- The average household size was the same for both Landsborough and the study area at the 2006 Census (2.7 persons per household).

###### *Occupation and income*

- The resident work force contained a large proportion of construction related occupations with labourers comprising the largest share of the occupational breakdown at 22.5% of all workers. The occupation with the next highest share was technicians and trade workers which accounted for 20.2% of all employed residents.
- The three largest industries by proportion of workers were construction at 15.7%, health care and social assistance at

10% and retail trade accounting for 9.9%. These industries were also the three largest in the Landsborough to Nambour Study Area.

- The median weekly individual income in Landsborough was \$250-\$399. There were higher proportions of persons earning less than \$1,000 in Landsborough and conversely less earning above \$1,000 when compared to the study area.

#### *Dwelling type and tenure*

- As expected, the dwelling structures of Landsborough are dominated by separate houses accounting for 87.5% of all dwellings. Proportions of semi detached and attached dwellings were both lower in Landsborough than in the study area. Other dwellings, which include dwellings such as caravans, demountable homes and tents accounted for 9.4% of total dwellings in Landsborough and only 3.4% in the study area.
- Home ownership was low in Landsborough with 29.7% of dwellings falling in this category compared to 35.4% for the study area. On the contrary, Landsborough had a high proportion of households being rented (29.2%) that the study area as a whole (22.5%).

#### *Housing repayment and rental prices*

- The median weekly housing loan repayment in Landsborough was comparable to the study area as a whole. In 2006, the median home loan repayment was \$1,129 in Landsborough and \$1,215 in the study area.
- The majority of households (55%) were paying rent of between \$180 and \$349 per week. Almost all of the remaining households (39%) were paying between \$0 and \$179 per week. There were only 3% of households reporting \$350 or above for rent, and 3% did not state rental payment.

#### *School attendance and educational attainment*

- Landsborough contained a greater share of persons attending primary school at 35.9% compared to the study area (33.9%). Proportions of secondary students was approximately equal that of the study area at 23.32% and 23.5% respectively.
- Compared to the study area, there were lower proportions of Landsborough residents with non-school qualifications, including bachelor degree (7.7% and 15.5% for the study area) and diploma holders (11.0% and 14.6% for the study area).

### **Mooloolah**

#### *Residential amenity*

Mooloolah is characterised by urban and rural residential development. Low density detached housing is the dominant type of dwelling in the area. The majority of dwellings within the township are on small suburban lots, whilst the surrounding residential development is made up predominantly of detached dwellings on lots of over 1,000 m<sup>2</sup>.

The Mooloolah business centre is intersected by the NCL and it caters for the residents of the township and surrounding rural residential communities. Mooloolah is connected to reticulated water and sewerage.

#### *Community vision*

The vision is for Mooloolah to retain its distinct identity as a rural community with the local business centre catering for the needs of residents within Mooloolah Valley. Based on the Caloundra City Planning Scheme, there is an intention for Mooloolah to have a strong sense of place reinforced through residents' active participation in community activities, and the protection of natural and rural character which attracts people to Mooloolah in the first place.

#### *Existing demographic and social environment*

##### *Population*

- The population of Mooloolah at the time of the 2006 Census was 1,132 which was an increase of 15.6% from the 2001 figure of 979.

##### *Indigenous profile*

- Mooloolah had a similar proportion of Indigenous persons residing in the area (1.6%) compared to the study area (1.7%).

##### *Household composition and size*

- The two largest family types in the town of Mooloolah Valley were couple families. Couple families with children composed 49.3% of the total families in the town, while couple families without children composed 31.6%. One parent families also made up approximately 17.8% of the town's families.
- The average household size in Mooloolah was 3.0. This was higher than the average recorded for the Landsborough to Nambour Study Area at 2.7.

##### *Occupation and income*

- The dominant occupation in Mooloolah was technicians and trade workers, representing 20.3% of the employed population. This is followed by clerical and administrative workers (13.7%) and labourers (12.2%).
- Construction (18.3%) and retail trade (14.4%) were the two dominant industries in which residents of Mooloolah were employed. Mooloolah also had a large proportion of people working in healthcare and social assistance, and manufacturing industries (11.3% and 8.7% respectively).
- In Mooloolah, the median individual income was \$400-\$599.

##### *Dwelling type and tenure*

- The separate house is by far the dominant dwelling type in both Mooloolah and in the study area. In Mooloolah, 97.4% of all dwellings were separate houses, while in the study area the proportion was slightly lower at 86.8%.

- Given the clear dominance of separate dwellings, there were no semi-detached dwellings recorded and a very low proportion of attached dwellings in Mooloolah. Other dwelling types (including improvised and makeshift dwellings) also represented a very small proportion of dwellings, with these being proportionately underrepresented when compared against the Landsborough to Nambour Study Area.
- Nearly half (47.2%) of all occupied private dwellings in the town of Mooloolah were being purchased at the 2006 Census. This was the largest tenure type in the town, ahead of outright ownership (29.0%) and renting (22.2%).

#### *Housing repayment and rental prices*

- Housing loan repayments were slightly lower in Mooloolah than they were in the Landsborough to Nambour Study Area. The average housing loan in Mooloolah Valley was \$1,202 per month, while in the study area the average was \$1,215.
- Based on the 2006 Census, the median rental price for Mooloolah was \$240 per week.

#### *School Attendance and Educational Attainment*

- Mooloolah had a slightly higher proportion of people attending pre-school (7.7%) and primary school (35.8%) than in the study area (5.5% and 33.9% respectively).
- In comparison to the study area, Mooloolah had a significantly higher proportion of people with postgraduate degrees (1.8% compared to 2.0% for the study area).

### **Eudlo**

#### *Residential amenity*

Eudlo is a small country town that serves as a hub for the surrounding rural community. The area consists of good quality agricultural land (identified in the Caloundra City Plan) and natural features of significant environmental value (e.g. Eudlo Creek, the Eudlo Creek National Park, and the Eudlo Creek Conservation Park). Residential development in Eudlo is characterised by low density rural residential lots. Aside from residential uses, Eudlo has allocations for tourist and extractive industry uses, whilst the remaining parts of Eudlo are identified for general rural activities.

#### *Community vision*

The community's vision for Eudlo is to retain the township's current population, physical size and service capacity. The Maroochy Plan's intent is to maintain Eudlo's rural landscape and existing land uses (i.e. general rural activity, rural residential development, conservation parks, tourist facility, extractive industry and a business and industry node at Forest Glen). Aside from local open space and community facilities currently available in the area, the Eudlo community is of acceptance that residents will have to travel to larger centres to access higher order goods and services.

### *Existing demographic and social environment*

#### *Population*

- According to the 2006 Census, the population of Eudlo was 175. Unlike other communities in the study area which experienced an increase in population between 2001 and 2006, the change in the population of Eudlo during this period was -5.91% (a loss of 11 people).

#### *Indigenous population*

- Based on the 2006 Census, no resident in Eudlo identified themselves as being Indigenous.

#### *Household composition and size*

- Couple families with children were the dominant family type in Eudlo, representing 46.7% of all families. This trend was consistent with the study area, where couple families with children accounted for 43.6%. However, in contrast to the study area, Eudlo had a relatively low proportion of couple families with no children (15.6%) and a relatively high proportion of one parent families (37.78%) when compared with the Landsborough to Nambour Study Area (39.7% and 15.7% respectively).
- The average household size (in Eudlo in 2006 was recorded as 2.6, which was slightly smaller than the study area (2.7 persons per household).

#### *Occupation and income*

- Eudlo has a significantly higher proportion of labourers (16.9%), machinery operators and drivers (12.1%), community and personal service workers (12.1%), and technicians and trade workers (25.3%) when compared against the Landsborough to the study area.
- Consistent with the occupational profile, Eudlo had a significantly higher proportion of residents working in construction, and transport, postal and warehousing. Eudlo also had a high proportion of workers in education and training, and agriculture, forestry and fishing.
- The median weekly individual income in Eudlo was \$400-\$599.

#### *Dwelling type and tenure*

- A significantly higher proportion of all occupied dwellings in Eudlo (55.6%) were being purchased than were in the Landsborough to Nambour Study Area (38.8%). In contrast, notably lower proportions of dwellings were fully owned (22.2% compared with 35.4%), and the same proportion of dwellings were being rented (22.5%). This may be caused by more recent residential purchases in Eudlo where residents are still paying them off, compared with longer standing residents who own their homes outright.
- The separate house is by far the dominant dwelling type in Eudlo with 93.7% of all dwellings being separate houses.

*Housing repayment and rental prices*

- Housing loan repayments were significantly lower in Eudlo than they were in the study area. The average housing loan in Eudlo was, \$1,105 per month, while in the study area the average was \$1,215.
- While Eudlo had the same proportion of dwellings being rented as the study area, the low absolute figure that this represents (12) means that the data that can be inferred from rental payments is relatively limited.

*School attendance and educational attainment*

- A slightly higher proportion of the residents in Eudlo were attending pre-school (7.8%), primary school (41.2%) or TAFE (13.7%) than in the study area (5.5%, 33.9% and 5.9% respectively).
- In regard to educational attainment, slightly higher proportions of people in Eudlo were recorded as possessing a graduate diploma and/or graduate certificate (6.1%), or a diploma or advanced diploma (18.2%) compared to the study area (2.4% and 14.6% respectively). A significantly higher proportion of residents were recorded as possessing a certificate qualification (59.1%) when compared to the Landsborough to Nambour Study Area (41.8%).

**Palmwoods***Residential amenity*

With the presence of heritage buildings that contribute to the historical and country style character of the township, Palmwoods is comprised predominantly of low density residential development on land designated for urban uses. There is capacity within the current planning provisions to accommodate new greenfield developments, which are to be master planned and will be subject to the preparation of a Local Area Structure Plan, or other detailed Plan of Development as approved by council.

*Community vision*

The vision of the community is to preserve and enhance the existing historic buildings within the Palmwoods township, and maintain the level of goods and services provided to the residents of the town and surrounding rural and rural residential areas. Although new residential development is expected within the area, the existing settlement pattern and layout of the older parts of the town will be maintained as key elements of character and amenity. Complementing the town's historical character will be the preservation of an attractive green space which currently traverses the town.

*Existing demographic and social environment**Population*

- The population of Palmwoods at the time of the 2006 Census was 2,622, which was an increase of 13.9% compared to the 2001 figure of 2,302.

*Indigenous population*

- Indigenous people accounted for 1.6% of the total population in Palmwoods. This was relatively consistent with the low proportion of 1.7% of residents who identified themselves as being Indigenous within the study area.

*Household composition and size*

- The township of Palmwoods recorded a slightly lower proportion of couple families with children than the Landsborough to Nambour study area as a whole. In contrast, a higher proportion of one parent families were recorded in Palmwoods (17.8%) than in the study area (15.7%).
- The average household size in Palmwoods was 2.7, which is the same as that of the study area

*Occupation and income*

- The dominant industries of employment in Palmwoods were construction (13.7%), retail trade (14.1%) and health care and social assistance (13.3%). The town was also strongly represented in the education and training, and manufacturing industries.
- The most common occupations in Palmwoods were technicians and trade workers (16.6%) and professionals (16.2%). This compared to 18.0% and 14.8% respectively.
- The median weekly individual income in Palmwoods was \$250-\$399.

*Dwelling type and tenure*

- At the time of the 2006 Census, 40.0% of all occupied private dwellings in Palmwoods were in the process of being purchased. This was the largest tenure type in Palmwoods, just ahead of outright ownership (30.0%) and renting (21.6%).
- In Palmwoods, 88.5% of dwellings are separate houses, while in the Landsborough to Nambour Study Area, the proportion is slightly lower at 86.8%.

*Housing repayment and rental prices*

- Housing loan repayments were marginally lower in Palmwoods than they were in the Landsborough to Nambour Study Area. The average housing loan in Palmwoods was \$1,163 per month, while in the average for the study area was \$1,215.
- The majority of households in rented dwellings were paying between \$225-349 per week for rent.

*School attendance and educational attainment*

- Compared to the study area, slightly higher proportions of people were currently attending pre-school (7.0%), primary school (36.1%), TAFE (8.0%) or university (6.3%) than in the study area.

- Palmwoods had a relatively similar distribution of non-school qualifications to the Landsborough to Nambour Study Area with residents with graduate diplomas accounting for 3.3%, those with bachelor degrees being 16.84%, those with advanced diplomas being 16.3% and residents with certificates accounted for 42.7% of residents.

## **Woombye**

### *Residential amenity*

Woombye is a discrete residential area characterised by low density detached housing. Due to its proximity to Nambour, the business centre in Woombye has a limited range of facilities and services catering for its residents and surrounding pockets of rural residential communities.

Woombye is surrounded by rural landscape, featuring rolling hills, natural bushland and small farms.

### *Community vision*

The vision is to maintain and strengthen the discrete identity of Woombye to distinguish this community from Nambour. Similarly, Woombye is to maintain its lifestyle and heritage values. The Maroochy Plan identifies land for future urban uses within the Woombye planning area.

### *Existing demographic and social environment*

#### *Population*

- At the time of the 2006 Census, Woombye had a population of 812 persons, which was equivalent to an increase of 12.6% from the 2001 Census population figure of 721. This increase was higher than the growth recorded for the study area (11.38%).

#### *Indigenous population*

- The proportion of non-Indigenous population in Woombye was similar to that of the study area (94.8% and 94.4% respectively). Indigenous people accounted for 2.1% of the total population compared to 1.7% in the study area, indicating a higher proportion of Indigenous people residing in Woombye.

#### *Household composition and size*

- Proportions of families with children including couple parents and single parent families residing in Woombye were both higher than that of the study area (45.2% compared to 43.6% and 17.5% compared to 15.7%) whilst the proportion of couple families with no children was lower (36.0% compared to 39.7%). The high proportion of families with children in Woombye is likely to be due to its close proximity to schools located in Nambour and surrounds.
- The average household size in Woombye was 2.6 persons per household which was slightly lower than that of the study area at 2.7 persons per household.

### *Occupation and income*

- The most common occupations for Woombye residents were labourers (18.2% of employed persons), technicians and trades workers (17.9%) and professionals and sales workers (13.9%).
- The dominant industries in Woombye were retail trade (16.3%), construction (11.2%), manufacturing (8.8%) and health care and social assistance (9.1%). Proportions of employed persons who work in the retail industry were higher in Woombye at 16.3% than in the study area at 13.1%.
- The median individual income in Woombye was \$400-\$599. Woombye contained greater proportions of households who earn high incomes, specifically between \$1,400 and upwards. The median household income for Woombye and the study area was \$1,000-\$1,199 per week.

### *Dwelling type and tenure*

- Dwelling tenure in Woombye indicates greater proportions of fully owned and rented properties, with fewer properties in the process of being purchased when compared to the study area. In Woombye, 39.7% of dwellings were reported as being fully owned compared to 35.4% in the study area. Households who were renting a dwelling accounted for 28.2% of all households in Woombye compared to 22.5% in the study area.
- Separate houses accounted for the majority of dwelling types in Woombye which included 91% of all households which was higher than 86.8% in the study area. The proportion of semi detached dwellings was slightly higher in Woombye at 5.45% than the study area at 3.3%.

### *Housing repayment and rental prices*

- Monthly home loan repayments in Woombye were slightly higher than repayments made in the study area, with on average \$1,300 being paid per month in Woombye compared to \$1,215 in the study area.
- Based on the available data from the 2006 Census, the majority of rents paid by households in Woombye were between \$140 and \$499 per week.

### *School attendance and educational attainment*

- According to the 2006 Census, the proportion of Woombye residents attending pre-school was 7.1%, those attending primary school was 33.3% and those attending secondary school was 24.3% (compared to 5.5%, 33.9% and 23.5% for the study area respectively).
- Woombye residents were more likely to be attending a tertiary institution compared to the study area as a whole. Those who were attending TAFE accounted for 7.1% in Woombye (5.9% in the study area) and those attending university comprised 8.1% of Woombye residents (6.3% in the study area).

- Certificate qualification was the most common type of education attained by Woombye residents (40.0%) although proportionally, it was lower than the study area (41.8%). With postgraduate qualification, a higher proportion of Woombye residents held a postgraduate degree (3.6%) compared to the study area (2.0%). It is likely that the lifestyle of the area attracts qualified professionals who commute to larger centres for employment.

## Nambour

### *Residential amenity*

Nambour is characterised by its contemporary country feel and is the largest residential community in the Maroochy hinterland and the largest on in the study area. The next largest town on the rail corridor is Caboolture. The town is set against a natural landscape of hills and hillside vegetation. Residential development within Nambour is of low and medium density.

As a geographic centre of the former Maroochy Shire, Nambour provides higher order goods and services to residential community in the hinterland and rural parts of the shire. These include medical and educational facilities which are considered to be district and regional level facilities.

### *Community vision*

Given its current function as an administrative centre for the shire, Nambour has been designated as a Major Activity Centre under the SEQ Regional Plan. Future development within Nambour will be in line with this activity centres designation with mixed use development dominating the town core. Maroochy Shire Council is currently in the process of implementing the Nambour revitalisation project to facilitate the development of Nambour as a Major Activity Centre.

### *Existing demographic and social environment*

The following socio-demographic characteristics of Nambour are sourced from the ABS 2006 Census.

#### *Population*

- Nambour's population increased from 12,782 in 2001 to 14,121 in 2006, which equated to a percentage change of 10.5%, slightly lower than the change recorded for the study area for the same period (11.4%).

#### *Indigenous population*

- Indigenous persons accounted for 2.7% of the population, which was higher than that of the study area (1.7%).

#### *Household composition and size*

- Couple families without children accounted for the majority of all families in Nambour (39.1%) whilst couple families with children accounted for 38.7%. Compared to the study area, Nambour had a higher proportion of single parent families (20.7%) than the Landsborough to Nambour Study Area (15.7%).

- The average household size in Nambour was 2.48. This was lower than the average recorded for the Landsborough to Nambour Study Area, which was 2.69 persons per household.

### *Occupation and income*

- The dominant industries of employment for Nambour residents were health care and social assistance (16.7%) and retail trade (14.6%). These industries were proportionally higher in Nambour when compared with the study area (12.8% and 13.1% respectively). Nambour was also strongly represented in the construction, and manufacturing industries.
- The dominant occupation in Nambour was technicians and trade workers, representing 17.9% of the employed population. This is followed by labourers (15.8%), with machinery operators and drivers the least prevalent occupation in Nambour (6.9%).
- The median weekly individual income in Nambour was \$250-\$399. Nambour was proportionately underrepresented in all income brackets above \$1,200 per week compared to the study area.

### *Dwelling type and tenure*

- Separate house was by far the dominant dwelling type in Nambour. In Nambour, nearly four in every five dwellings (78.4%) were separate houses, while separate houses accounted for 86.8% of all dwellings in the study area. In contrast, semi-detached dwellings represented 5.9% of dwelling stock in Nambour, compared to 3.3% for the Landsborough to Nambour Study Area.
- One third of all occupied private dwellings in the town of Nambour were being purchased at the time of the 2006 Census. This was the largest tenure type followed by renting (accounting for a slightly lower proportion of dwellings at 31.3%) followed by full ownership (30.8%). Compared to the study area (22.5% and 35.4%), Nambour had a higher proportion of rented dwellings. This is likely to be due to Nambour having a lower median rental price in comparison to other localities in Maroochy Shire.

### *Housing repayment and rental prices*

- Housing loan repayments were significantly lower in Nambour than they were in the Landsborough to Nambour Study Area. The average housing loan in Nambour was \$1,115 per month, while in the Landsborough to Nambour Study Area, the average was \$1,215.
- Generally, rents are cheaper in Nambour than they are in the Landsborough to Nambour Study Area. According to the 2006 Census, more than a quarter (28.7%) of rented dwellings in Nambour cost less than \$140 per week compared to 24.3% of dwellings in the Landsborough to Nambour Study Area. Similarly, Nambour had the lowest median weekly rental price compared to other townships in the study area.

- In contrast, there are comparatively few rented dwellings in Nambour that cost between \$275-\$349 per week and just 1.5% that cost over \$350. In contrast, in the Landsborough to Nambour Study Area 14.5% of all rented dwellings cost between \$275-349 per week, and 3.0% that cost over \$350 per week.

#### *School attendance and educational attainment*

- Slightly lower proportions of Nambour residents were attending a pre-school, primary school or secondary school when compared to the Landsborough to Nambour Study Area. However, of the persons attending an educational institution in 2006, a higher proportion attended both TAFE and University while living in Nambour than did in the Landsborough to Nambour Study Area. This may be attributable to the close proximity of Nambour to the Sunshine Coast TAFE and the Sunshine Coast University and the availability of affordable rental housing in Nambour.
- With regard to educational attainment, Nambour had a slightly lower proportion of persons with a certificate (41.5%) compared to the Study Area (41.8%). Similarly, the proportion of Nambour residents with an advanced diploma or diploma degree was lower (13.6%) compared to that of the study area (14.6%).

### **8.2.6 Key implications of socio-economic baseline**

The following key points from the socio-economic baseline analysis have important implications when considering the economic impact of the rail project and associated economic development opportunities:

- Population growth in the study area has been steady and such growth would be supported by the rail project by providing workers, directly for the project, in supporting industry, and encouraging growth of small to medium sized business.
- There are generally low rates of rental tenure in the area which could result in difficulties housing rail project workers in the local area and put pressure on the current rental housing market. It is noted that low levels of rental housing is a nationwide issue and will not be easily or quickly ameliorated. It should be noted that levels of rental housing should be further studied closer to the project commencement and is expected to change significantly over time.
- The study area has a range of short term accommodation including motels, bed and breakfast, cabins and lodges. These are obviously important to the local tourist market and have benefits for the economy, however if well managed, short term workers could potentially make use of seasonal capacity without impacting on tourist use, and provide additional income to local accommodation operators. However further investigation of seasonal capacity would be required.

- The area has a relatively lower level of attainment of formal educational qualifications compared with Queensland and SEQ, with relatively low levels of professionals and clerical and administrative workers. The area has relatively higher levels of technicians and trade workers, and labourers. This is reflected in the relatively lower levels of income in the study area. This indicates the area is lacking in higher educated, and knowledge based employment which tend to be higher paid, are generally recognised as having an export focus and, therefore, tend to bring greater economic benefits to the area. While the rail project will require a range of employees there exists the opportunity to employ local trade workers and labourers, while providing the opportunity to enhance skills in line with State government policy.
- The area has a high proportion of workers in the area of Education and Training (concentrated in Nambour) with more local employees in that area than local residents (indicating on balance workers in this field come to the area from outside). There is a local TAFE in Nambour and therefore potential exists for local training for rail project workers.

## **8.3 Economic base**

### **8.3.1 Employment and industry**

The study area defined for the project is predominantly a rural area. An inspection of the region impacted by the project reveals large areas of native vegetation or regrowth, a smaller amount of grazing land and a smaller area again of orchards. There are also a number of residential properties along the rail corridor either in the form of town allotments or acreage.

In general terms, the study area has slightly higher proportions of lower order, labour orientated jobs including labourers and trade workers when compared to SEQ and Queensland (around 2% to 4% higher). Conversely, professional and knowledge orientated jobs (professional and clerical and administrative workers) account for a lower share of total employed persons when compared with SEQ and Queensland. The differences in the proportion of jobs in the professional and clerical and administrative workers sectors mentioned are in the order of 3% to 4% lower for the study area compared to SEQ. It is noted that the strategic direction of the council is to encourage a diversification of the employment base by adding to the tourism and population driven employment, with knowledge based industries creative industries, and world class research and learning.

The study area has a strong focus on Agriculture, Forestry and Fishing, Education and Training and also Health Care and Social Assistance. The high level of jobs in the agriculture sector is consistent with the rural nature of the area surrounding the north coast line, with the Nambour Hospital and associated services contributing a high number of jobs to the health sector.

Education jobs are boosted by the role of Nambour as a centre for secondary and TAFE studies in the hinterland.

The study area has fewer jobs in Manufacturing, Financial and Insurance Services and Professional, Scientific and Technical Services, when compared with SEQ. The greater prevalence of primary and service industry jobs is consistent with the rural nature of the area and the likelihood of professional and knowledge based jobs to be located in the major coastal centres.

Data from Caloundra City Council up to 2005 (Business Activity Reports by Postcode) shows the areas in Caloundra that have had a steady increase in the number of businesses locating between 2001 and 2005. This includes Beerwah the area, up from 298 to 322, Mooloolah area, up from 224 to 258, and Landsborough, up from 172 to 192. The percentage of businesses in these three areas, as a proportion of total business in Caloundra, is remaining relatively steady.

The commercial property market on the Sunshine Coast generally is described as having a tight supply and strong demand, with employment opportunities strong, and the economy robust. Areas with significant commercial property sales over the previous year included Nambour and Palmwoods.

The north coast line would have historically provided significant economic benefits in the transport of timber, and rural produce. The rail stations have historically provided a focus for the transport of goods into and out of the area, and as such have attracted complementary businesses and services. While the local focus of the rail line is now on commuter passengers there is expected to be some benefit for adjacent retail businesses due to passing trade, and these opportunities would be expected to increase with improved rail service and higher patronage. Commercial businesses will benefit from the improved rail service through better access by employees.

There is a strong perception in the local community (Community Values Survey, 2007, see Section 7.1 of this report) that the location of railway stations in close proximity to town centres provide a strong economic input, particularly for existing employment centres such as Nambour and Landsborough. There is also a strong perception that improvements in the rail service will provide opportunities for local business. Community feedback indicates a strong feeling that moving rail stations away from existing town centres would result in a high level of adverse economic impact for town centre businesses.

### 8.3.2 Economic development focus

#### Economic development in the region

There has been significant economic development work undertaken at an LGA and regional level (SunROC; Maroochy, Noosa and Caloundra LGAs). The focus of the economic development strategies are generally broad but have identified some locations in the study area that have a specific economic focus. Generally the focus of economic development strategies centre around:

- improved transport accessibility within the region and access to Brisbane, (particularly Brisbane Airport and Port of Brisbane)
- upgrading of the north coast line
- broaden economic base and encourage value adding, and innovation in industry and business
- encouragement of knowledge based industries
- shift from population driven, low value added products to high value added export oriented products
- develop and improve the stock of industrial land on the Sunshine Coast
- capitalise on lifestyle attractions and clean environmental image
- encourage micro and small businesses
- encourage world class research and learning
- provide world class information technology.

#### Local economic factors

Generally the opportunities for economic development are articulated at a local level through the planning scheme. General economic opportunities on at this level include:

- rural industries will diversify with a move to value adding and processing along with the protection of good quality agricultural land
- growth in home based businesses
- tourism based on natural values and rural character (tourist enterprises to remain low scale)
- opportunities for small scale tourist accommodation to be provided in areas of demand
- existing retail and service centres to be strengthened, but consolidated within existing precincts
- some strengthening of industrial uses, but with limited expansion of existing precincts.

Only Beerwah and Nambour and to some extent Yandina are seen as accommodating significant new business or industry, with the remaining towns focused on consolidating existing commercial uses within existing precincts. Most business development is focused on niche business, home business, and small scale tourism enterprises and accommodation. The area includes a number of plant nurseries of various scales, and diverse rural industries. Key industrial development is identified for various precincts, however these are predominantly located in areas outside of the areas of immediate impact. The main industrial areas are Yandina (including an 'investigation area'), Sippy Creek Industrial Investigation Area, Nambour, Forest Glen, Beerwah and Kunda Park. These are predominantly serviced by key road routes and access to the Bruce Highway.

The following provides a summary of the centres have specific economic activity for key towns and potential for employment growth.

## Beerwah

Beerwah is recognised as being a Commercial/General Economic Activity Centres in the South East Queensland Regional Plan. Beerwah has a significant retail and business centre. It contains an industrial precinct on the eastern side of town with potential for growth. The Caloundra LGMS projects that Beerwah will have 23,000m<sup>2</sup> total existing and new retail and commercial GFA by 2026, rising to a total of 50,000m<sup>2</sup> by 2046. The LGMS also identifies the Beerwah Industry and Enterprise Area with approximately 25ha of land east of Steve Irwin Way.

The following Figure 8.3a shows the breakdown of business types (2001 to 2005) in the Beerwah area which also includes Peachester, Crohamhurst, and Coochin Creek. This shows that the dominant businesses are retail and wholesale trade, construction, property and business and manufacturing. Property and business have increased in proportion of overall business numbers over the survey period, while the agriculture, forestry and fishing sector has declined steadily.

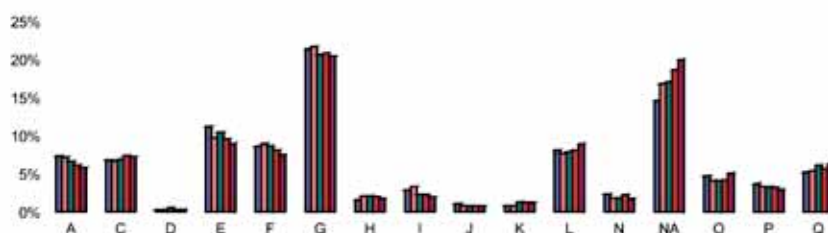
Figure 8.3a: Number of businesses in the Beerwah area

POSTCODE: 4519

Table: Number of Businesses by ANZSIC Division and Year

Code	Division Description	2001	2002	2003	2004	2005
A	Agriculture, Forestry and Fishing	28	28	26	25	24
C	Manufacturing	26	26	27	30	30
D	Electricity, Gas and Water Supply	1	1	2	1	1
E	Construction	43	38	41	39	37
F	Wholesale Trade	33	35	34	33	31
G	Retail Trade	82	85	81	85	85
H	Accommodation, Cafes and Restaurants	6	8	8	8	7
I	Transport and Storage	11	13	9	9	8
J	Communication Services	4	3	3	3	3
K	Finance and Insurance	3	3	5	5	5
L	Property and Business Services	31	30	31	33	37
N	Education	9	7	7	9	7
NA	Unclassified	56	66	67	76	83
O	Health and Community Services	18	16	16	17	21
P	Cultural and Recreational Services	14	13	13	13	12
Q	Personal and Other Services	20	21	24	23	26

Chart: Percentage of Businesses by ANZSIC Division and Year



Source: Caloundra City Enterprises, Business Activity Report

## Landsborough

The population of Landsborough was 1,576 in 2006. This was an increase of 11.6% compared to the 2001 population figure of 1,393.

Landsborough has a 'Core Industry Precinct' and is identified as a business and industry area and a key location tourist town in its own right and also for tourists accessing the Blackall Range Tourist Drive and the towns of Maleny and Mapleton. Industry is expected to remain within the existing precinct. The three largest industries in Beerwah by proportion of workers were construction at 15.7%, health care and social assistance at 10% and retail trade accounting for 9.9%. These industries were also the three largest in the Landsborough to Nambour Study Area.

The Figure 8.3b shows the breakdown of business types (2001 to 2005) in the Landsborough area which also includes Mount Mellum. This shows that the dominant businesses are retail trade, construction, property and business, personal and other services and manufacturing. Retail trade, transport and storage and personal and other services have increased in proportion of overall business numbers over the survey period, while the wholesale trade and property and businesses services have declined steadily.

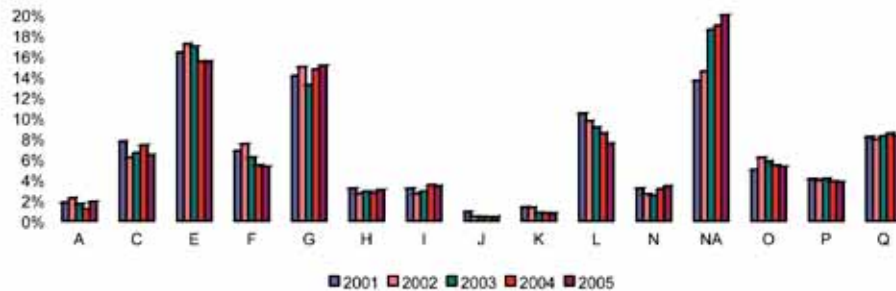
Figure 8.3b: Number of businesses in the Landsborough area

POSTCODE: 4550

Table: Number of Businesses by ANZSIC Division and Year

Code	Division Description	2001	2002	2003	2004	2005
A	Agriculture, Forestry and Fishing	4	5	4	3	5
C	Manufacturing	17	14	18	19	17
E	Construction	36	39	41	40	41
F	Wholesale Trade	15	17	15	14	14
G	Retail Trade	31	34	32	38	40
H	Accommodation, Cafes and Restaurants	7	6	7	7	8
I	Transport and Storage	7	6	7	9	9
J	Communication Services	2	1	1	1	1
K	Finance and Insurance	3	3	2	2	2
L	Property and Business Services	23	22	22	22	20
N	Education	7	6	6	8	9
NA	Unclassified	30	33	45	49	53
O	Health and Community Services	11	14	14	14	14
P	Cultural and Recreational Services	9	9	10	10	10
Q	Personal and Other Services	18	18	20	22	22

Chart: Percentage of Businesses by ANZSIC Division and Year



Source: Caloundra City Enterprises, Business Activity Report

### Mooloolah

The population of Mooloolah at the time of the 2006 Census was 1,132 which was an increase of 13.5% from the 2001 figure of 979.

The dominant occupation in Mooloolah was technicians and trade workers, representing 20% of the employees. This is followed by clerical and administrative workers (14%) and labourers (12%).

The following Figure 8.3c shows the breakdown of business types (2001 to 2005) in the Mooloolah area which also includes Diamond Valley, Glenview, Mountain Camp, Palmview, Mooloolah Valley and Glenview Estate. This shows that the dominant businesses are construction, retail trade, property and business, wholesale trade and manufacturing. Property and business services have increased in proportion of overall business numbers over the survey period, while the manufacturing, construction and retail trade have declined steadily.

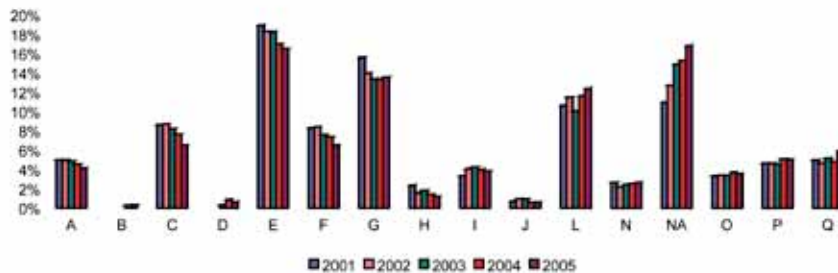
Figure 8.3c: Number of businesses in the Mooloolah area

POSTCODE: 4553

Table: Number of Businesses by ANZSIC Division and Year

Code	Division Description	2001	2002	2003	2004	2005
A	Agriculture, Forestry and Fishing	15	16	16	16	14
B	Mining				1	1
C	Manufacturing	26	28	27	27	22
D	Electricity, Gas and Water Supply			1	3	2
E	Construction	57	59	60	60	56
F	Wholesale Trade	25	27	25	26	22
G	Retail Trade	47	45	44	47	46
H	Accommodation, Cafes and Restaurants	7	5	6	5	4
I	Transport and Storage	10	13	14	14	13
J	Communication Services	2	3	3	2	2
L	Property and Business Services	32	37	33	41	42
N	Education	8	7	8	9	9
NA	Unclassified	33	41	49	54	57
O	Health and Community Services	10	11	11	13	12
P	Cultural and Recreational Services	14	15	15	18	17
Q	Personal and Other Services	15	15	17	17	20

Chart: Percentage of Businesses by ANZSIC Division and Year



Source: Caloundra City Enterprises, Business Activity Report

### Eudlo

According to the 2006 Census, the population of Eudlo was 175. Unlike other communities in the study area which experienced an increase in population between 2001 and 2006, the change in the population of Eudlo during this period was -6.3% (a loss of 11 people).

Eudlo has a significantly higher proportion of labourers (16.87%), machinery operators and drivers (12.05%), community and personal service workers (12.05%) and technicians and trade workers (25.30%) when compared against the broader study area.

Eudlo is not seweraged and there are no plans within the 20 year horizon to provide a better level of infrastructure or increase the 'urban footprint'. Therefore there is unlikely to be any significant residential or commercial development within the next 20 years.

### Forest Glen industrial/business area

Forest Glen Industrial/Business Area is based around the Bruce Highway and is located to take advantage of road freight infrastructure. The focus of business is expected to be manufacturing and design, with opportunities to take advantage of excellent access via the Bruce Highway.

### Palmwoods

The population of Palmwoods at the time of the 2006 Census was 2,622, which was an increase of 12.2% compared to the 2001 figure of 2,302.

The dominant industries of employment in Palmwoods were construction (14%), retail trade (14%) and health care and social assistance (13%). The town was also strongly represented in the education and training, and manufacturing industries.

It is intended by the planning scheme that tourism will remain small scale and low key, while small scale service industry will complement the business centre.

### Woombye

At the time of the 2006 Census, Woombye had a population of 812 persons, which was equivalent to an increase of 11.2% from the 2001 Census population figure of 721. This increase was higher than the growth recorded for the study area (10.2%).

The dominant industries in Woombye were retail trade (16.3%), construction (11.2%), manufacturing (10.5%) and health care and social assistance (9.1%). Proportions of employed persons who work in the retail industry were higher in Woombye at 16.3% than in the study area at 13%.

### Nambour

Nambour's population increased from 12,782 in 2001 to 14,121 in 2006, which equated to a percentage change of 9.5%, slightly lower than the change recorded for the study area for the same period (10.2%).

The dominant occupation in Nambour was technicians and trade workers, representing 18% of the employed population. This is followed by labourers (16%), with machinery operators and drivers the least prevalent occupation in Nambour (7%); and

Nambour is marketed as the Hub of the Hinterland. It is already the major service and retail centre for the Sunshine Coast Hinterland. This role is intended to be strengthened as it is identified as a Major Regional Activity Centre and Commercial/General Economic Activity Centre under the SEQ Regional Plan. It is also identified as a Commercial/General Economic Activity Area under the SEQ Regional Plan. Nambour is the location for the regional public hospital (and allied health services), high school and TAFE. Nambour is also the location of administration for a range of State and Commonwealth government agencies, as well as a key administration centre for Maroochy Shire Council. Nambour has a number of industrial precincts, and a broad range of retail services. The Moreton Sugar Mill was a major industry in the centre of Nambour until falling sugar prices caused failing profitably, and it was closed in 2003. The closure of the mill and proposals for its redevelopment precipitated the declaration of the Nambour Major Development Area by the Office of Urban Management. This requires Maroochy Council to prepare a Structure Plan for the Major Development Area with the aim of ensuring future development is well integrated and meets the objectives of Nambour. The Structure Plan will aim to ensure activation of the railway station and efficient integration with the Nambour Activity Centre.

According to the Nambour Chamber of Commerce and Industry Nambour boasts the following services;

- nine banks and credit unions
- three hotels with bottleshops
- five major food chain outlets (three major grocery retailers)
- seven retail petrol outlets
- five day-care centres
- two pre-schools
- five high schools
- a special education centre
- five primary schools (two State/three private)
- a major TAFE campus
- a major RSL club
- seven motels
- three Post Offices
- 14 church complexes
- two modern hospitals with maternity wards
- all mainline medical specialties
- major imaging unit and cancer treatment facility
- therapies centre
- GPs, dentists, optometrists and five veterinary clinics
- two bowls clubs
- five major motor dealerships
- an Olympic pool complex
- cinema
- live theatre
- easy access to Sunshine Coast University
- golf, bowls, badminton, tennis, darts, netball, basketball, horse riding and sports venues.

(Source: <http://www.raywhitenambour.com.au/demographics.htm>)

### Yandina

Yandina is identified as a centre for Advanced Design and Manufacturing. It contains a significant amount of industrial land with an emphasis on tourism based on rural processing (boutique tourist ventures), and a food industry cluster. Industrial and business areas in Yandina include Yandina Gateway Industrial, Old Bruce Highway North, and Yandina South Industrial (total of 32.4ha)

Yandina has an 'investigation area' which may provide regionally significant industrial land (approximately 11ha of developable land).

### Blackall Range

Blackall Range (Maleny and Mapleton) have an economy focused on tourism and rural economy, with small scale business, retail, tourist (with small scale tourist accommodation) and community uses.

### Other industrial areas in the region

While the Coastal strip is the predominant area for retailing and associated services the Sunshine Coast has number of precincts with the intended land use of 'Core Industry' and Business and Industry. Apart from those mentioned these include Yandina-Coolum Road Industrial, Airport Industrial Park, Maroochydhore Business and Industry, Kunda Park and the Sippy Creek Industrial Investigation Area.

### Employment and retail/commercial space

Nambour is the largest economic centre of all of the townships due to the higher order retail and commercial spaces within the area. Nambour Plaza is a large shopping complex that contains a Woolworth's supermarket, Big W, multiple banks, pharmacies as well as other chain and convenience retailers. This is a major

contributor to the local economy through the provision of jobs and other services. Also within Nambour is a large range of personal services, entertainment and recreational facilities.

Under the Maroochy Shire Council (now replaced by the Sunshine Coast Regional Council) Nambour Structure Plan, it identifies and defines the intent for the Nambour Major Development Area. Under this plan, Nambour will be able to accommodate 1,200 jobs and operate as a Major Activity Centre (MAC), as defined in the SEQ Regional Plan, by 2026. Further from this, 100,000sqm of retail and commercial space will be incorporated into development within the area. This will have a major impact upon the local and regional economic operation of the area.

Another significant factor is the redevelopment of the Moreton Mill Site on Mill St in the Nambour study area. The redevelopment of this 4.46ha site is still subject to council approval however the site is proposed to be redeveloped as a shopping complex. Stage one of the complex, currently being processed by council for approval, will contain:

- basement car parking of 969 car parking bays (including 50 dedicated QR Limited car parks);
- 20,210sqm GFA shopping complex (level one)
- 5,100sqm GFA showroom development
- cinema (3,100sqm GFA with 1,171 seats – level two)
- offices with 1,200sqm GFA (level two)
- car parking comprising of 364 bays (level two).

Landsborough Shopping Village is a local shopping complex that contains a large IGA supermarket, Post Office, newsagent and other convenience retailers and services. Landsborough is the second largest centre, after Nambour, in terms of economic contribution within the study area.

Woombye, Mooloolah, Palmwoods and Eudlo have very similar levels of retail and commercial facilities. Each town contains an IGA supermarket as the main grocery retailer for the local catchment. Small local shopping districts within these towns contain convenience retailers such as butchers, bakeries, liquor stores and hardware stores. Within Mooloolah, there is a significant focus upon the sale of produce and other elements of the rural lifestyle. This is a significant contributor to the local economy within Mooloolah.

Dairy production and other rural production practices such as produce farming, more specifically pineapples, strawberries and avocados, are the main industries within the general area. These are a major employment generator for the region. However, the rural land directly affected by the new rail corridor is generally not subject to intensive agriculture, but rather appears to be used for low intensity cattle grazing or have only an edge impact.

Commercial office space is concentrated in Nambour with a number of government services and administration centres

including council. Private sector office space is predominantly made up of numerous small office spaces occupied by small businesses and professional services. The smaller rail corridor towns included office space focused on local services, such as real estate, business services and professional services.

#### *Sport and tourism facilities*

Sporting and tourism facilities and features should also be considered as economic factors in the local context, attracting activity and flow on spending. Such facilities vary within the study area.

Once again, Nambour has the widest range of these facilities with Landsborough also containing a significant number of sporting and tourism facilities. In Nambour, there is more of a focus on sporting facilities rather than tourism based facilities. In Nambour, there is a showground, Leagues club, Golf club, netball courts, gymnasium and a dedicated sportsground, including a croquet lawn. Limited tourism facilities are located in the Nambour area. In Landsborough however, there are a number of tourism facilities operating. Australia Zoo is a major tourist destination for both domestic and international tourists. This facility is a major economic factor located within the study area. Also located in Landsborough, is the Big Kart Track, a go kart track catering for primarily domestic tourists. Sporting facilities are also located within the Landsborough area. These facilities include football and tennis facilities as well as a dedicated sports and recreation club. Another major facility that is located in Landsborough is the Scouts Association of Australia Campsite.

Sporting and tourism facilities are also located, to some extent, within the townships of Woombye, Palmwoods, Eudlo and Mooloolah. The most significant sporting facilities include soccer fields as well as golf and tennis clubs. The Big Pineapple tourist attraction is located near Woombye, however this facility is no longer a major drawcard, with no significant recent investment. It is understood there is interest in redevelopment of the site for residential housing.

Opportunity exists to incorporate increased short term accommodation facilities to encourage tourism activity in the study area. This would greatly influence the local economy and could possibly lead to a stronger economic standing within the wider region of the Sunshine Coast. The economic development of the study area will continue to be influenced by sporting and tourism facilities, as well as the utilisation of retail and commercial space within each township.

### **8.3.3 Other major projects of economic significance**

The study area is part of a growing region and as such, along with the rail project, a number of other significant infrastructure projects are either under investigation, being planned, or underway:

- Caboolture to Landsborough Upgrade - Upgrades are nearing completion for the rail line between Caboolture and Beerburrum, with work to be completed up to Landsborough. The scope of works include: track duplication, road realignments and upgrades to Elimbah and Beerburrum rail stations between Caboolture and Beerburrum and; track duplication and straightening, and upgrades to Glasshouse Mountains and Beerwah stations between Beerburrum and Landsborough.
- Beerwah Rail Crossing Project - The project involves the removal of the open level crossing in the centre of Beerwah Township by constructing a road connection over the railway.
- Caboolture to Maroochydore Corridor Study (CAMCOS) - The study involves the proposal for a passenger train service for the Sunshine Coast region, with faster rail connections to Brisbane.
- CoastConnect - The Department of Transport and Main Roads has commenced investigations into a bus priority corridor between Caloundra and Maroochydore.
- TransLink Network Plan - TransLink has developed a plan for improving public transport services across the Southeast Queensland region. Upgrades to Sunshine Coast bus services and facilities form part of TransLink's Network Plan.

## 8.4 Consultation of economic relevance

The project team has undertaken a range of community and stakeholder consultation throughout the project to date. This section provides a summary of some of the community input in relation to economic issues.

### 8.4.1 Community values survey

A Community Values Survey was conducted in October 2007. The self-administered<sup>4</sup> survey was completed by 1,006 respondents between one and 24 October 2007. The survey consisted of 16 open ended and closed ended questions. There were a number of survey responses which provide some insight into the local community relating to economic impact of the project. The following sections give a summary of responses that relate to economic impact only.

<sup>4</sup> The survey was made available to residents of the area who completed them in their own time before posting back to the project team.

### Importance of station for local business

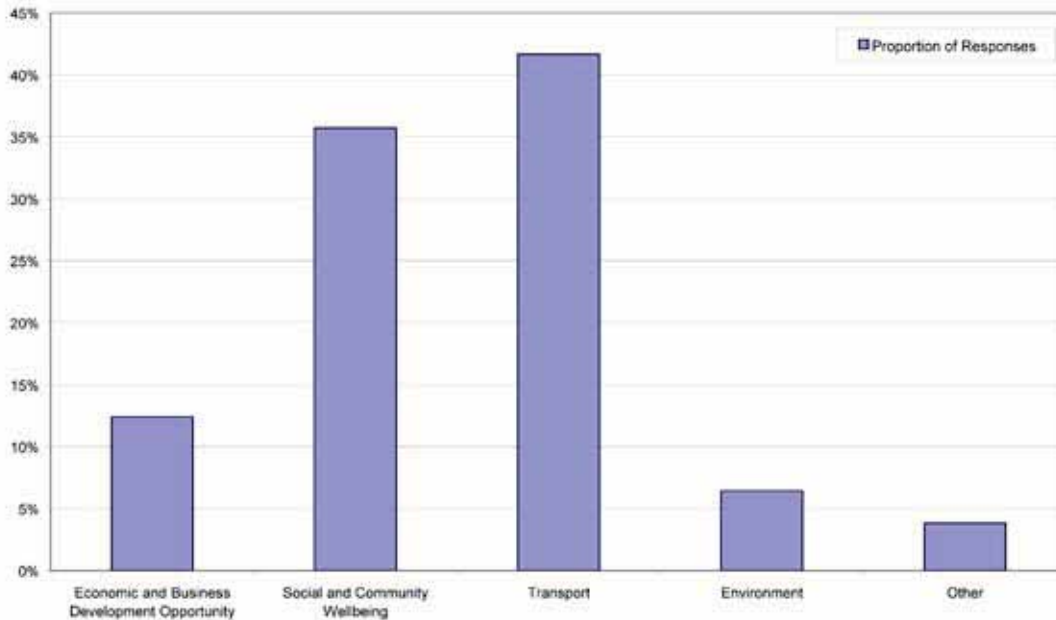
One of the survey questions sought a response to the statement 'the rail station plays a large role for local businesses'. The respondents were asked to rank their response on a rating scale from 'strongly disagree' through to 'strongly agree'. Of all respondents, 42% neither agreed nor disagreed with the statement, while a relatively similar proportion of respondents 'agreed' or 'disagreed' (21%). There were approximately 9% of respondents who agreed strongly that the station was important for local business, whereas approximately 6% strongly disagreed.

At the suburb level, suburbs with a high proportion of respondents stating 'agreed' or 'strongly agreed' were Yandina (66%) and Landsborough (53%). Meanwhile 41% of Mooloolah respondents either 'disagreed' or 'strongly disagreed'. It is interesting to note that parts of the Mooloolah community has been particularly vocal in their opposition to the proposal raising such issues as severance of the township and the high number of businesses that would be lost in their present location. A significant number of towns also had a high proportion of respondents neither agreeing nor disagreeing, namely Maleny (56%) and Mapleton (67%). This is to be expected given these communities are not on the rail line and some distance from it. The high level of agreement in Yandina and Landsborough that 'the rail station plays a large role for local business' may be due to the greater industrial activity in those centres, and a perception that these rely on rail services (either for freight or employee commuters).

### Major community opportunities

One of the survey questions sought a response to the question 'what do you consider to be the major opportunities for the community within the study area?' Figure 8.4 outlines the proportion of responses relating to major opportunities for local communities within the study area. This figure indicates that 'transport' was considered to be the most significant opportunity for the study area. Opportunities relating to 'social and community wellbeing' were also consistently nominated by respondents as being a major opportunity for the study area, accounting for over 35% of responses. Respondents nominating economic and business development opportunities made up 12% of the total. It should be noted however that many of the opportunities raised for transport and social wellbeing result in economic advantages. These include higher patronage of the rail service, reduced road congestion, quicker travel times, and access to jobs and services.

Figure 8.4: Major opportunities for the communities



Source: Community Values Survey, 2007

Responses regarding major opportunities for the community were also analysed by respondents' suburb of residence. 'Transport' was identified as a major opportunity for respondents living in Beerwah (100% of all respondents from Beerwah), Mapleton (75% of all respondents from Mapleton) and Maleny (56% of all respondents from Maleny).

Respondents from Landsborough and Nambour, the largest economic hubs in the region, had a proportionally higher than average response in regard to 'economic and business development opportunities' (20% and 19% of responses respectively). Furthermore, Eudlo and Woombye residents were far more likely to view 'social and community wellbeing' opportunities as more prominent, with 44% and 43% of responses respectively. Overall, the survey findings reveal that how residents perceive opportunities is significantly influenced by their suburb and subsequent lifestyle priorities.

A closer examination of the responses to this open ended question provide further details of respondents views in relation to potential economic opportunities. Specific responses included the following repeated opportunities associated with improved rail services:

- tourism and associated employment opportunities based on the natural attractions of the area, (could be improved also by rail access to the coast)
- increased employment opportunities through business growth and better access to jobs
- business growth (including small business, self employment, eco-tourism, sustainable small scale farming enterprises, boutique industries)

- keeping money in the area (more local spending)
- encourage business opportunities through improved access
- encourage population growth through better commuter services
- reduction of road congestion, traffic accidents and CO2 emissions through shift to rail travel
- shift to more energy efficient travel
- use of rail freight in place of road freight
- general economic growth
- growth in education and culture
- development of industry for local employment
- improved service would attract greater patronage and increase commuter use of rail
- need for better connections to coast (Caloundra, Kawana and Maroochydore)
- better access to education and services (shopping, medical)
- promotion and improvement of Nambour as a major centre of the Sunshine Coast
- infrastructure investment such as the proposed rail corridor upgrade is needed for economic development.

#### 8.4.2 Community input

During the compilation of the Environmental Impact Statement (EIS) report, a number of issues have been raised by local community groups and individuals. The Mooloolah community has compiled a submission outlining issues that are raised by the project.

With respect to the economic impacts of the proposal, community members have responded through the compilation and submission of the Mooloolah Commercial Precinct Report, compiled by Mooloolah community groups. Within this report, the major issues that have been raised are:

- The project could result in high levels of segmentation of the township. This segmentation could have an effect upon internal movement and social activity within the township. These elements directly affect the economic activity within Mooloolah.
- Increased improvement of internal infrastructure within the township would be necessary to accommodate the new rail line. For example, it would be necessary to replace the current level crossing with a bridge overpass. This is a significant project and would have detrimental effects upon the township in terms of congestion and other factors as well as affecting the economic stability of businesses operating in the area.
- The proposed development is extremely large in scale and would pose much disruption to the township.
- The project could result in the overall disruption of social and economic systems currently operating within Mooloolah.
- Concern over the loss/relocation of a number of businesses within the area was raised. The businesses affected (by the earlier preferred route which has since changed) are:
  - Mooloolah Fruit and Veg
  - Accounting for You
  - the Valley book-keeping service
  - Mooloolah Post Office
  - Mooloolah Valley Seafood
  - Mooloolah Beauty Spot
  - Mooloolah Hair Care
  - Mooloolah Massage
  - Alpha Realty
  - Mooloolah Chinese Restaurant
  - Cotton Lane
  - Mooloolah Karate School
  - onsite Centre Manager Office and Residence
  - mini Storage Units
  - Little Munchkins Early Learning Centre.

Resulting from these issues, a number alternatives and recommendations were posed by the community groups. These recommendations highlighted possible opportunities for the area to grow in economic strength as well as remaining as an attractive place to live, work and visit.

Firstly, community groups raised the idea of introducing a 'Park and Ride' facility into the area to utilise the rail station currently within the area as well as encourage more people to utilise the new larger station if developed. It was also recommended that

the current rail station, if replaced by a new station, should be used as a possible railway museum. This could result in the station and Mooloolah becoming a significant day trip location, resulting in increased tourism and economic input.

## 8.5 Assessment of impacts

In this section the potential impacts on the SEQ and Queensland economy (including employment) of the construction processes generated by the project, are identified and assessed.

### 8.5.1 Economic impact modelling

#### Understanding the outputs of the modelling

The purpose of assessing economic impacts is to examine how the project affects the economy of the study area (in this case SEQ and Queensland) through all of the linkages between industries in the economy. It is the sum of the direct contribution (or 'economic stimulus') of the project, and the 'in-direct' contribution ('flow-on effect') to the economy. The final result is an overall picture of the project's total economic contribution.

The input output model produces the following three indicators which together provide the overall picture of the economic impact the project has on the study area economy:

- output (or total turnover), which refers to the value of total expenditure associated with the Landsborough to Nambour project
- value added, which is the equivalent of total turnover less the amount spent on non-labour inputs and imported inputs
- employment, which refers to the number of full time equivalent (FTE) jobs supported by the project.

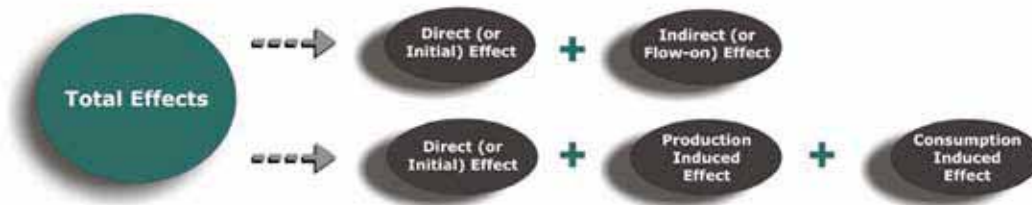
The total impact or contribution is comprised of 'direct effects' (also known as the 'initial effect') and 'indirect effects' (also known as the 'flow-on effects'). The direct effect measures the level of output, employment or value added directly generated through the construction project. In the case of the Landsborough to Nambour project, the direct effect in the construction phase would be the total construction, planning and management costs.

The 'in-direct contribution' to the economy of the study area exists because the construction processes would require purchase of inputs from companies who would in turn spend those dollars on their inputs, and so on. The in-direct contribution therefore traces the flow of money spent in the SEQ and Queensland economy and is the measure of the additional value generated in the economy due to implementation of the Landsborough to Nambour project. Calculation of the total in-direct contribution is based on all expenditures associated with the project.

These in-direct contributions can be measured in terms of the dollars of spending that they generate, in terms of the value added they generate and also the additional jobs they generate in other sectors of the economy.

To summarise, economic impact assessment comprises the following:

### Economic Impact Assessment



In the last part of the equation, production induced effects relate to how local upstream industries benefit from the increased demand for their goods and services as a result of winning project related supply contracts (in this case supply contracts awarded as a result of the rail project), and their increased local purchasing in servicing these supply contracts. Consumption induced effects relate to the increased regional spending of the project's associated wage and salary earners on items such as food, clothing, housing, etc. and how local suppliers' purchases change in order to meet the induced sales.

#### Assumptions and limitations

The economic modelling conducted as part of this study provides an assessment of economic impacts arising from the construction of the project. It provides detailed analyses on the industries likely to be impacted upon and the levels of those impacts. The economic modelling is, however, based on a certain assumptions. The assumptions utilised are carefully considered, as the accuracy of the economic impact assessment outcomes depends on the validity of the assumptions used.

The use of certain assumptions for the modelling process, while appropriate for the current scope of information required, also have limitations with regards to the outputs produced. The general assumptions in the economic modelling process and the limitations on the information available for the project are discussed below.

The economic impact modelling has not included operational costs, as details of the operational costs and how these may change are not available. It is assumed that operational costs will be similar and will not have a significant impact on the assessment.

#### Modelling assumptions

The multipliers utilised in this study are from a regional specific version (SEQ and Queensland) of the 2004-05 national input output tables produced by the ABS, which are the most up to date tables available at this time. These tables have been benchmarked for each State using the most recently available State accounts. An assumption behind input-output models is that industry dynamics are static, when in reality an economy will evolve over time. It is important to understand the nature of the static input-output tables when interpreting the results of the analysis.

The multipliers are calculated based on sound methodology; however they should be viewed as having a theoretical element. They are estimates of the potential impacts associated with the project, and do not completely reflect phenomenon such as the economy evolving differently as a result of the project and, for example, local industries changing their business operations to better capture the benefits of the impacts. Nonetheless, the results produced by using the multipliers generated by the input-output tables will provide reliable information regarding the impact under current conditions and interactions.

For this impact assessment, some specific assumptions have been undertaken. The project identifies an intention to source as many inputs as possible, for the construction period, from the local (SEQ) economy. However, it is assumed that some inputs will have to be sourced from outside of the SEQ region. Therefore, an indicative breakdown has been used assuming that 80% of inputs will be sourced from within the SEQ region and 20% from the wider Queensland region. An indicative timing has also been provided, which assumes that the construction processes (inclusive of design and survey) begin in 2018 and conclude at the beginning of 2025 with the commissioning of the second stage of the construction as it becomes operational. Due to a lack of detailed breakdown of costs, it is assumed that the costs will be distributed evenly over the seven year time period. Note that the costs presented are in 2008 dollars so it does not matter in what year the project begins, as long as the 7 year indicative time period is adhered to.

#### Information and modelling limitations

Although a sufficient amount of data was provided to generate reliable estimates of impact, the availability of information relating directly to the rail project was limited to some extent, which is common for these sorts of assessments. The limitations refer to the difficulty in obtaining detailed information on all expenditures associated with the project and the timing and location of all identified expenditures, which help to enable a non-theoretical understanding of the geographic distribution of the impacts. These assumptions have been made to help address these limitations.

It is important to note at this point the limitations of using an input-output (IO) model to assess impacts. As discussed, the IO tables are based on a static economy which means that they can not account for changing industry dynamics, both as a result of

the natural progression of the economy and potentially as a result of a specific project. Also, the benefits outlined can be overstated at times, particularly regarding things like labour generation. The model assumes that labour is newly generated and does not factor in labour transfers away from other industries and projects.

### 8.5.2 Economic impacts for the project components

Drawing on information directly acquired from the Department of Transport and Main Roads, and tailoring the input-output model to account for the structure and dynamics of the SEQ and Queensland economies, the economic analysis identifies the interface between the activities associated with the Landsborough to Nambour rail project and all industries in the economy of the study area (SEQ and Queensland). It estimates the contribution that the project makes to the economy in terms of both the direct contributions - of output, value added and employment - as well as the in-direct or 'flow-on' contributions. The in-direct or 'flow-on' contributions result from the additional output, value added and employment generated by other businesses due to the project. It is important to note that the flow-on contribution may not be realised immediately and refers to the generation of output, value added or employment in years to come. However, it is expected that the flow-on contributions would primarily be realised in the earlier years and diminish there after. The economic impact of the Landsborough to Nambour project during the construction period is outlined below.

#### Project costs

The project costs have been estimated as summarised in Table 8.5.2:

Table 8.5.2: Project costs summary

Item	Estimated cost (\$)
Railway formation	745,046,125
Railway stations	88,550,000
Railway trackwork	74,262,000
Railway electrification	47,855,500
Railway signalling	49,434,000
Services/Utilities	8,155,000
Roadworks	17,159,150
Rail trail	950,000
Escalation on Rates to Dec 08	25,785,294
Property acquisition	105,719,707
Contingencies and unmeasured items	317,159,121
Management, planning, design and survey	206,153,429
Estimate total	1,686,000,000

#### Construction impacts – SEQ

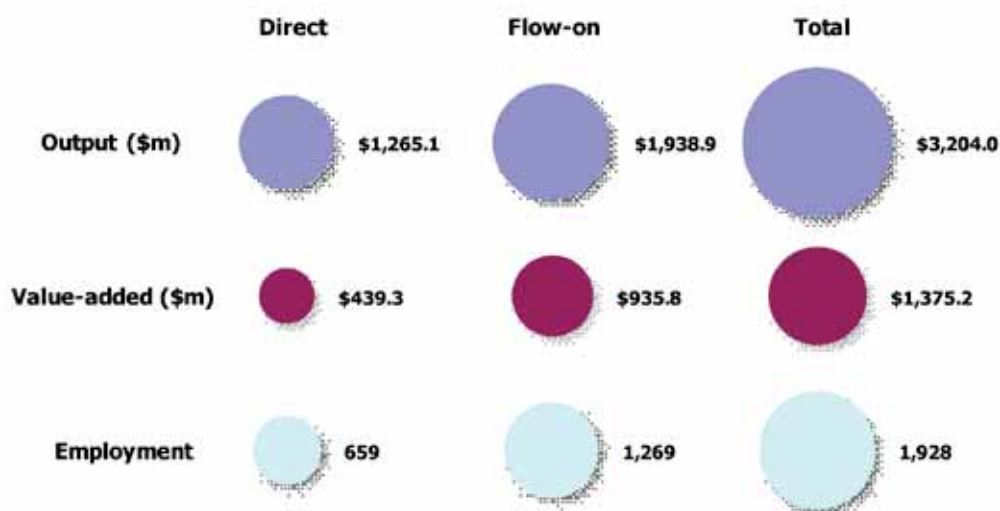
The total impact of the project on the SEQ economy, in terms of output, over the entire construction period will be approximately \$3.2 billion. The total impact consists of a direct and in-direct (flow-on) component. The direct impact to the economy will be approximately \$1.27 billion, and the flow-on impact induced in the economy will be around \$1.94 billion. Given a seven year construction period, the project will directly contribute \$180.7 million annually to the SEQ economy and will induce a further \$277.0 million annually in flow-on contributions. This will total approximately \$457.7 million annually.

The project will inject approximately \$3.2 billion in the economy over the construction period, \$1.38 billion of which can be attributed to the value added component. Value added is an important measure as it does not focus solely on the amount spent on construction but highlights the contribution that is going directly into the economy through items such as employee salaries and operating surplus (as opposed to going back into other industries). It is purely the value added component of the products measured and not the total sale value being recounted as the product moves from industry to industry. For purposes of comparison it is noted that the 2006/2007 Queensland Gross State Product was \$174 billion. The direct value added generated as a result of this project, in the SEQ economy, will be around \$439.3 million. The output generated will also generate a further \$935.8 million dollars of flow-on value-added, giving the total value-added component of \$1.38 billion. The value-added generated annually over the construction period will total \$196.5 million. This consists of a direct annual value-added component of \$62.8 million and a flow-on value-added of approximately \$133.7 million.

The output generated by the Landsborough to Nambour project will support approximately 659 jobs directly in the SEQ economy on average over the construction period. The flow-on output generated through the construction period will support approximately 1,269 jobs in the economy on average over the period. This means that on average over the life of the construction, the project will support approximately 1,928 total jobs at any particular point in time. These numbers will likely be higher during the middle of the construction period and less at each end but would average the figures given above.

Figure 8.5a depicts these construction impacts/contributions to the SEQ economy.

Figure 8.5a: Construction impacts on the SEQ economy, 2018-2024



Source: SGS Economics and Planning

### Construction impacts – Queensland

The total impact of the project on the wider Queensland economy, in terms of output, will be approximately \$4.57 billion for the construction period. The direct output contribution to the economy will be approximately \$1.58 billion, or the total cost of the project. This direct impact will generate a flow-on impact in the economy of around \$2.99 billion. Over the defined construction period of seven years, the direct annual impact to the Queensland economy will be approximately \$225.9 million. Around \$427.5 million will be induced in the economy annually as an indirect effect of the construction period processes, making a total annual impact of \$653.5 million dollars over the construction period.

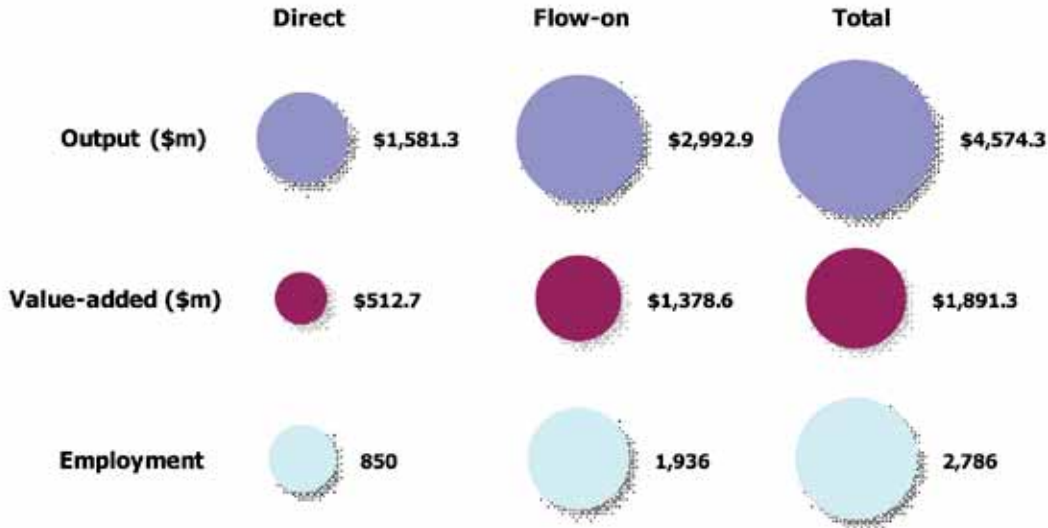
There will be direct value-added attributable to the output generated by the construction processes in the Queensland economy of approximately \$512.7 million. The period will also have an indirect value-added impact of \$1.38 billion meaning that there will be around \$1.89 billion of total value-added generated in the economy as a result of the construction processes. For purposes of comparison it is noted that the 2006/2007 Queensland Gross State Product was \$174 billion. Over the designated construction period of seven years, this will mean a total value-added annually of approximately \$270.2 million. This total value-added consists of a direct annual component measuring \$73.2 million and an indirect annual component of \$196.9 million.

There will be approximately 2,786 total jobs supported in the Queensland economy on average over the construction period as a result of the processes invoked by the rail project. These jobs are made up of the direct jobs held in the economy as a result of the value of the construction processes (output), that being 850 jobs. There will also be a further 1,936 jobs on average induced in the Queensland economy due to the flow-on effects of the project's output. This means that on average over the life of the construction, the project will support approximately 2,786 total jobs at any particular point in time. These numbers will likely be higher during the middle of the construction period and less at each end but would average the figures given above.

The figures for the Queensland economy can be related back to the SEQ economy figures noting that the figures for SEQ are included within the Queensland figures and make up the majority of the Queensland economic benefits. This indicates that most of the benefits will be retained in South East Queensland provided the assumptions made in regard to local sourcing of goods and services are accurate.

Figure 8.5b depicts the construction impacts to the Queensland economy.

Figure 8.5b: Construction impacts on the Queensland economy, 2018-2024



Source: SGS Economics and Planning

### Land acquisition costs

It is estimated that for the project to go ahead, there will be approximately \$105.8 million dollars spent on land acquisition. It is expected that any commercial enterprise displaced by the acquisition of land will be compensated for with the introduction of new commercial floor space opportunities (i.e. ensuring appropriately located and zoned land). Regarding quantifying the impacts of the land acquisition costs, in a residential context, further assumptions are required which are very subjective and would return a result with little meaning given that the overall effect will be quite small.

### Housing market impacts

The study area is an attractive residential area, due to options existing for residing in small towns, and a rural residential setting in what is a scenic area, which is reinforced by recent significant increases in housing costs. At the same time, access is a key issue for such things as reaching places of employment, attracting employees and running a business.

Some residential properties will need to be resumed for the project, but it is reasonable to expect that some of these will seek to re-establish in the area, stimulating additional demand and development. During the construction of the project is also expected that there will be an increase in housing demand to accommodate workers and this will encourage new housing development. There will also be some short term disruption to some residential properties along the corridor as the project proceeds, however in the longer term the attraction of high quality rail services is expected to stimulate new housing development. High quality public transport

has the potential to attract residential development, particularly when stations are well designed and supported by transit oriented development. As outlined in this report the project will provide a high quality rail service which is expected to support small and medium sized businesses which can locate and operate in the area, but still have good access to support key aspects of their business. This will in turn stimulate housing demand for those business owner operators.

### 8.5.3 Other economic impacts

Apart from the quantifiable economic impacts associated with the spending arising from the project (and detailed in the previous section), there are other economic impacts which have not been costed but never-the-less should be considered. This includes both broad benefits, but also in this section are discussions of the economic impact on the Queensland economy, and specific rail town impacts.

#### Economic impacts not quantified in assessment

The following impacts have not been quantified in the Economic Impact Modelling but should still be considered. It is expected that some of the following factors would be addressed separately in a Cost Benefit Analysis which would compare the existing rail corridor/service with the new alignment.

#### Savings in time and distance travelled

Savings in time and distance travelled will be achieved through the proposed corridor improvement, however regional public transport connections will create much greater potential for residents to

benefit due to the increased choice of travel destinations. These wider connections are currently being planned for including CAMCOS. Savings will also be boosted by efficient provision of services (scheduling and frequency). Given the travel time savings proposed for the new rail corridor (shown in Table 8.5.3), the following per occupant savings between stations are estimated using a benchmark of \$10 per occupant per hour to value the time of rail patrons (sourced from the Department of Infrastructure, Victoria).

Table 8.5.3: Travel time savings per occupant, CityTrain services, Landsborough to Nambour route

Section	Basis	Travel Time (Minutes)		Difference from Proposed		Value per Person [\$AU]	
		In	Out	In	Out	In	Out
Landsborough to Mooloolah	Existing- As Documented by QR Limited <sup>5</sup>	5.00	5.00	0.87	1.78	\$0.14	\$0.30
	Existing- Simulated in TPC <sup>5</sup>	3.38	3.72	-0.75	1.78	-\$0.13	\$0.30
	Proposed	4.13	3.22	-	-	-	-
Mooloolah – Eudlo	Existing- As Documented by QR Limited	6.50	6.50	2.82	2.77	\$0.47	\$0.46
	Existing- Simulated in TPC	5.87	5.95	2.18	2.77	\$0.36	\$0.46
	Proposed	3.68	3.73	-	-	-	-
Eudlo – Palmwoods	Existing- As Documented by QR Limited	3.50	3.50	0.02	-0.12	\$0.00	-\$0.02
	Existing- Simulated in TPC	8.42	8.28	4.93	-0.12	\$0.82	-\$0.02
	Proposed	3.48	3.62	-	-	-	-
Palmwoods – Woombye	Existing- As Documented by QR Limited	3.50	3.50	0.53	0.55	\$0.09	\$0.09
	Existing- Simulated in TPC	4.18	4.50	1.22	0.55	\$0.20	\$0.09
	Proposed	2.97	2.95	-	-	-	-
Woombye – Nambour	Existing- As Documented by QR Limited	4.50	4.50	1.38	0.77	\$0.23	\$0.13
	Existing- Simulated in TPC	4.85	4.55	1.73	0.77	\$0.29	\$0.13
	Proposed	3.12	3.73	-	-	-	-
Total	Existing- As Documented by QR Limited	23.00	23.00	5.62	5.74	\$0.94	\$0.96
	Existing- Simulated in TPC	26.70	27.00	9.32	5.74	\$1.55	\$0.96
	Proposed	17.38	17.26	-	-	-	-

It is understood that the vast majority of freight on the subject rail line is travelling through the area rather than freight originating or being sent to the study area. Therefore, savings in freight transport will accrue mainly with freight travelling through the study area at higher speeds and less time (not quantified in this report).

#### Savings in private vehicle operating cost

It is expected that savings in private vehicle operation costs will be boosted through the enhanced appeal of the north coast service, connections with the wider public travel options provided through future CAMCOS links to the coastal strip.

#### Reduced growth in road accidents

Reduction in the growth of road accidents will be boosted through improved utilisation of public transport along the corridor and wider public travel options provided through future CAMCOS links to the coastal strip. Benefits will also be boosted by efficient provision of services (scheduling and frequency).

#### Industry concentration effects

The potential benefit of employment and industry concentration effects could most likely be maximised through sensitive and innovative redevelopment of existing town centres, where offices and high value businesses could be located. Good links to industrial areas such as those at Forest Glen, Yandina, Beerwah and Nambour will boost public transport use to these work places and make them attractive options for high value businesses (such as professional services, knowledge based industries and creative industries).

#### Social connectivity benefits

Social connectivity could be enhanced through the provision of affordable housing in close proximity to the rail stations. Such development would need to be sensitive to existing character of the townships.

<sup>5</sup> Travel Performance Calculator (TPC) is the simulation software used to determine the travel times for the different rail alignments. Refer to Chapter 7.

#### *More comfortable public transport travel*

The project will result in higher rail speeds, smoother operation, and less stops. This will result in a more comfortable public transport experience, which would be expected to increase patronage. In addition, a more comfortable travel experience would generally be valued more highly by patrons. Because of the significant journey time from the study area to regional workplaces, opportunities for working on the train should be explored, in conjunction with improved comfort. This may, for example, include the provision of internet connections and work space on trains.

#### *Reduced social exclusion costs*

Social inclusion could be improved through a focus on local benefits, including employment, training, and local sourcing of inputs. There should be a focus on capacity building and benefits that will sustain the area beyond the construction phase.

#### *Induced travel*

Induced travel will be improved through regional public transport connections such as CAMCOS. Frequency and scheduling of services are important, while access to the stations and an attractive station environment will also influence travel choices and therefore result in economic savings of higher rates of public transport use.

#### **Economic impacts to the Queensland economy**

The project will have direct and flow on benefits for the study area both in terms of spending on the project and employment, assisting businesses through improved rail access, and supporting tourist travel. However, the project improves one part of what is a State wide rail network, which is expected to expand in time especially with passenger services linking with the Sunshine Coast regional centres of Caloundra and Maroochydore. The project has the potential to contribute future benefits far beyond the study area and in time will be an important part of the proposed public transport system in the Sunshine Coast area. Therefore, the project has significant economic benefits which should be noted although they are not quantified in this report.

The project will improve long distance rail services via the tilt train, with improved travel times. The project is expected to result in a quicker and more comfortable journey, and a more efficient service. The rail line will also carry freight and the time saving in freight transport has economic benefits particularly for certain types of freight. The rail service plays an important role in transporting goods through the region particularly towards Brisbane Airport and the Port of Brisbane. The project will result in improved efficiency for all passenger and freight services utilising this section of rail.

#### **Economic impacts to the rail towns**

The existing rail line passes through six towns in close proximity to, or intersecting existing retail and business centres. These business centres are integrated with the rail stations which have influenced the function and form of the centres. The towns are significant economic features of the study area and therefore are subject to specific comment in this section. This section includes some general considerations in relation to the rail towns, which is followed by specific consideration for each rail town.

The existing railway stations attract patrons and those dropping off patrons by car, thereby providing convenient access to retailing and services for many people, and enhancing the economic function of the towns. The project has the potential to seriously impact on both individual businesses, and the overall function of the centre.

The policy of removing open level crossings also has significant implications for town centres, as this may involve significant overpass structures that can impact on traditional character, functionality, visibility and access, while removing traditional road frontage. These are all factors which could have serious impacts on the economic and social function of the railway towns.

It is considered that the positioning of any new grade separated crossings should be carefully considered to avoid town centre impacts. This may involve lowering of the corridor being passed over to reduce the height and length of any bridging structure.

The project requires land from the following rail towns:

- Landsborough
- Mooloolah
- Eudlo
- Palmwoods
- Woombye
- Nambour.

#### *Residential*

Some of the properties mentioned are residential dwellings. Where residential properties are resumed, there will be a corresponding loss of consumption driven spending in the local economy, however it is expected some of the owners will seek to relocate within the general area, thereby stimulating housing development. The improved rail service is also likely to enhance the attraction of new residential development and over time new development will compensate for the loss of residents through the rail project.

#### *Town centre businesses adverse impacts*

A number of businesses will also be directly affected by the project. The potential closure and relocation, in some instances, of these businesses will have a significant impact upon each

specific rail town's economy. However, it is expected that where ever possible an appropriate amount of land would be zoned for commercial uses to (at least) replace that resumed by the rail project. In addition increased use of passenger rail services has the potential to attract spending in the vicinity of the rail stations (through commuters and potentially tourists) and this would result in business growth with flow on benefits for the community and local economy.

The majority of businesses affected by the rail project are located within Mooloolah and Nambour. The businesses that will be affected within these areas are primarily small businesses, generally locally owned and operated. Apart from direct property impacts and land requirements, there may be shorter term construction impacts on remaining businesses. This may include short term restricted access and amenity impacts that would have an adverse impact on business turnover. Such impacts should be limited as much as practical, however it is again noted that longer term benefits may outweigh shorter term impacts.

#### *Town centre business benefits*

While a number of negative economic impacts can occur as a result of the rail line, positive impacts upon the economy within rail towns will also result. These impacts will most likely occur after the construction phase of the rail line when it is in full operation. It is expected that increased demand for retail and commercial services would over time result in an equal or greater level of services being established. In addition there is potential in a number of cases for the project to allow for better integration of the town centres and improved access. Stations located in the centre of rail towns will encourage economic growth for these areas.

Increased patronage will encourage economic growth within townships; however this must occur in conjunction with high levels of access to, and within, each centre. Access to business centres will be a significant issue when determining the economic impacts of the proposed rail line. It is necessary that adequate measures are put in place to ensure that both vehicular and pedestrian access is maintained; especially to the business area of each township. High levels of access will also decrease travel times to and from each township, which can result in increased productivity. For workers commuting to or from rail towns, increased productivity can contribute to economic growth within each region.

#### *Streetscaping*

Opportunities also exist within these rail towns to incorporate streetscape improvements along with the construction and implementation of the rail corridor. Through improved streetscapes, focus can be drawn to businesses within the local business area of each township. This can directly result in increased retail expenditure, thus further contributing to the town's economy.

Due to the proposed location of the rail corridor, an area of surplus rail corridor land will be made available for possible future uses within Mooloolah. The possibility of economic growth as a result of this development is high as retail and commercial uses can be developed on these lots. Business growth due to these developments will contribute to the local and regional economy in a positive way.

#### *Regional business opportunities*

It is also important to consider that improved local passenger rail services especially combined with intra-regional linkages will encourage businesses to locate in the hinterland. It is envisaged that small knowledge based businesses, and home based businesses would be attracted to the area by the lifestyle and amenity attractions. Access to high speed broad band connections and reliable phone services would encourage such businesses to the area, as they would be well connected via information technology, and could also use the rail for travel to major regional centres for meetings, conferences, or for air travel via Brisbane (or longer term via Caloundra or Sunshine Coast Airports). The types of jobs that would be attracted in this way are high value jobs, and would result in a beneficial diversification of the local economy. These types of jobs have the potential to have an export focus, providing goods and services to those outside of the area.

Direct impacts specific to the business centres of each of the rail corridor towns are discussed below.

#### *Landsborough*

The Landsborough business centre is not affected by the project. The corridor is only changed slightly as it passes through Landsborough and only in the northern part, well clear of the business centre and any commercial uses.

#### *Mooloolah*

The proposed rail corridor passes through the centre of Mooloolah near its current location. However, the new corridor will be wider, with impacts directly on existing businesses, and has raised community concerns. The main direct property impacts will be on the shopping centre to the north east of the current level crossing and the Little Munchkins Early Learning Centre to the south east. In addition, a road over rail overpass is required in the town centre. There is the possibility that surplus rail land to the west of the current station may be available to accommodate commercial uses. Careful consideration needs to be given to encourage alternative sites for retail purposes, replacing those lost through the new corridor. In addition the impact of the overpass on amenity and functional access need to be carefully considered, such that the economic impact on the town centre is minimised. The impact on Mooloolah is significant and should be carefully managed to encourage relocation of existing businesses, improve access in the town centre (pedestrians and cyclists as well as cars), and minimise the impact of an overpass on the town centre function and character.

### *Eudlo*

The proposed rail corridor will pass to the west of the existing rail corridor which is already to the west of the town centre. In this case the project would not impact directly on existing business properties. The new station has been located to maintain visual links and access to the existing centre.

Eudlo also has very limited land available for development within its 'urban footprint' and is not sewered.

### *Palmwoods*

The town centre is on the western side of the rail line. The proposed rail corridor in this location is to the east of the existing station, but still in reasonably close proximity to the town centre. In this case there exists the opportunity to change the location of the grade separated crossing and the road network to better integrate the various parts of the town centre and allow clearance/access for larger trucks (which is currently limited). The project will not directly impact on current businesses, but does have property impacts on the bowls club. The design of the station should encourage access to the town centre and community uses.

### *Woombye*

Woombye has its retail centre to the east of the rail line, while significant playing fields are located to the west, and access between the two is limited. The proposed rail corridor is slightly the west of the current corridor with no direct impact on the town centre and partial impact on the adjacent pony club and soccer fields. The project is not considered to have any significant impact on the town centre.

### *Nambour*

As the proposed rail corridor enters Nambour it is generally slightly to the west of the current alignment extending towards Petrie Creek which is generally undeveloped. There are however businesses impacted in Colless Lane and just west of the town centre in Price Street (the eastern side of Price Street south of the station). The existing businesses in these areas are understood to be service industries and light industrial uses, each with a relatively small floor area. The draft Nambour Structure Plan has changed the properties on Colless Lane from Core Industry to Residential High Density. The Structure Plan has changed the Price Street Precinct from Town Centre Core to Mixed Use High Density (although the more detailed Precinct Plan allows only for commercial and residential uses, and not retail). The enhanced passenger rail service will assist in meeting the development intent of the draft Nambour Structure Plan which includes:

- a diverse range and choice of housing with medium to high residential densities between 30 to 80 dwellings (net) or greater per hectare

- providing a concentration of mixed land uses focussed around the Nambour public transit interchange to promote transit oriented development principles.

While some existing light industry and service industry uses will no longer be able to operate in existing premises, the improved rail service will bring a range of benefits to Nambour. The directly affected businesses have potential to relocate to existing industrial land within Nambour. It would be beneficial if there was a review of the availability of industrial zoned land to support relocation.

An improved rail service will support the intent of the Draft Nambour Structure Plan, with redevelopment of Nambour at higher densities generally encouraging the economic development and the economic function of Nambour as a Major Activity Centre.

### **Accommodation impacts**

It is expected that rail project workers will come from the local area where possible however the sourcing of workers will be dependant on the economy and labour market conditions at the time of construction. It is expected however that there will be a significant workforce, from outside of the area, requiring short to medium term accommodation. While some of this may be taken up in the local rental market it is important to avoid adverse impacts on rental housing and short term accommodation. This should be managed through an Accommodation Strategy.

The take up of rental housing by project workers will benefit owners of the rental housing and encourage local spending as the workers are more likely to spend time off in the local area. However, there exists the potential that rental levels will be pushed up through the increased demand and (depending on vacancy rates at the time) this may impact on households on lower incomes that are forced to rent. Therefore alternative accommodation of workers should be provided through short term use of hotels, caravan parks, and cabins. This would benefit operators of such accommodation, particularly in low season, but should be managed so it does not impact on demand by tourists during periods of stronger demand. It may be that temporary accommodation is provided for workers in purpose built 'work camps' however these should have access to local services and facilities. The rental market, and local labour force market, should be assessed nearer to the time of construction and this information used to inform the Accommodation Strategy.

### **Agricultural impacts**

The project area includes a mix of urban, rural and semi-rural land uses. In general there has been a trend to expand urban areas into land once occupied by farmland, and also to subdivide former farms into rural residential housing lots. The area includes a number of productive farms for the purposes of grazing, small crops, orchards, and plant nurseries. An

examination of Journey to Work data for the Statistical Local Areas which encompass the study area provides details of the agricultural sector. In general the agriculture, forestry, and fishing sector provides approximately 5% of jobs in the study area, which well below other industry sectors such as health care and social assistance (20%), retail trade (12%) and education and training (11%). Most agricultural jobs are in the fruit growing, plant nurseries, vegetable growing, beef cattle farming, cut flower and flower seed growing, and dairy cattle farming. However, the majority of the rail project appears to impact on areas which are either not used for agricultural or are being used for grazing. Agricultural uses with a high economic return for a given area (such as orchards or cropping) are largely avoided by the rail project. The effects of the rail corridor on rural properties potentially include:

- the loss of Good Quality Agricultural Land or productive land
- the loss of established orchards or established nursery trees required for propagation
- the loss of buildings and infrastructure
- difficulty in operation or loss of access to parts of the property if the rail corridor dissects the property.

SGS understands that rail freight through the study area is generally not used to service the local agricultural industry and therefore, the project will not result in any specific benefit for the agricultural sector.

According to information provided to the Department of Transport and Main Roads, approximately 50 of the 68 rural zoned properties affected by land requirements for the project have been identified as being actively used for grazing, crops or horticultural purposes. An examination of aerial photography of the study area and proposed rail corridor, also gives an indication of the extent of impact on the agricultural industry. The areas of highest potential impact include the following properties.

- a large grazing area between the Mooloolah River and Neill Road, Mooloolah, where the rail corridor runs through the middle of the property
- properties along Spackman Lane north of Palmwoods, which include some horticulture, although the cropping areas appear to be not directly affected
- properties north of north of Victory Park, Woombye, including Birdwood Nursery.

Other rural properties are affected, however these appear to be either used for grazing, or are affected only along an edge of the land holding, and therefore the existing activities could continue or be transferred to an alternate location.

Woombye has a significant plant nursery (Birdwood Nursery) which advises they have an annual turnover in excess of \$2 million, and employ 38 staff. They also advise they have

expansion plans which have now been put on hold due to the rail project. The new rail corridor will require a small portion of land on an edge of the property. However, the nursery contends that the land affected is critical to their operations as it contains mature trees required for propagation. In general, the proposed rail corridor is expected to adversely impact on rural industries, although the extent of the impact is generally limited by the fact that the proposed corridor does not impact on the production of many high value rural commodities. The majority of the rail corridor appears to impact on rural residential properties, grazing land, or native vegetation, and therefore the impact on rural industries is limited. However, some rural industries will be affected with a corresponding economic impact and this should be limited as much as practical. Information on the exact extent of any land acquisitions and timing should be provided to assist farmers in making necessary adjustments and forward planning to adjust to the changes as much as possible. Where the project affects access to parts of the rural property alternative access should be provided where practical.

## 8.6 Mitigation and enhancement

The general enhancement of positive impacts of the project can result in greater overall benefits arising from the project. On the other hand, effective mitigation of negative impacts will result in impacts being managed in a way that reduces their effects and results in greater net benefits.

### 8.6.1 Enhancement

#### Generation of employment

Jobs will be generated through the construction of the project. While the number of jobs related to construction will be relatively fixed, consideration should be given to local employment opportunities and the potential for training associated with the project. In keeping with the State's 10% Policy, a Skills Development Plan must be prepared and implemented with monitoring by the Department of Education and Training. Approaches should be made to the Nambour TAFE and University of the Sunshine Coast to attract trainees and apprentices. These institutions should also be used to deliver up-skilling education where possible. Consideration should be given to skills and training that extend beyond the life of the project into related areas where skilled workers are in demand.

Local businesses may be in a position to offer services to the project and employ more workers during the construction period. This should be enhanced by the use of local contractors where ever possible. The project must be subject to a Local Industry Participation Plan, as specified by the Local Industry Policy. The Plan should include the following criteria:

- development of a long-term, internationally competitive industry in Queensland and Australia

- employment, training and skills development
- regional development initiatives
- value-added activity
- opportunities for participation by small business
- existing industry development activity and proposed new investment
- innovation, research and development.

While this will assist businesses during the construction period, longer term benefits for the study area may result if such businesses can position themselves to expand their services to other markets, making use of the capacity and skills acquired during the project.

Consideration should also be given to economic development policy specific to the Sunshine Coast Hinterland that seeks to promote the lifestyle and rail transport of the area, and attract high value jobs in the area of knowledge based, and creative industries. This should be supported by ensuring a highly reliable phone system (mobile and land line), and the provision of high quality broadband internet connection.

Local employment where possible will provide more localised benefits through greater levels of local spending. The employment of workers outside of the local areas will bring with it demand for accommodation and this has the potential to boost incomes for rental owners and short term accommodation owners. However, it is recommended that an Accommodation Strategy be put in place to maximise such benefits, while limiting potential adverse impacts such as inflated rental price increases, and loss of tourist accommodation capacity. Where local workers can be encouraged to spend time in the area and spend on food, recreation, services and entertainment the benefits to local economies can be enhanced.

#### **Tourism improvements**

Tourism improvements could be enhanced by considering the tourist opportunities of each town and how these could be accessed through rail travel. This may include activities such as local markets, arts, or boutique creative industries. Each town may be able to offer a distinct tourist experience that complements rather than competes with other towns.

Consideration should be given to community requests with respect to tourism destinations within the study area, including the re-use of character railway stations. Tourism within the study area could be enhanced significantly through the implementation of selected community strategies.

The rail line also carries long distance tourist rail services including the Tilt Train. These services extend from Brisbane as far north as Cairns, with inland services to Longreach and Mount Isa. The Cairns route has a high speed service which is currently restricted by the Landsborough to Nambour section of rail line. The rail project will cut travel times for these services making them more efficient, and any higher use of long distance tourist services will result in greater benefits for the broader Queensland economy.

#### **Impact on land values**

Improved access to the rail stations and appropriate mitigation measures (i.e. acoustic/visual barriers) will assist in improving land values. Improved access and urban design around the rail stations is dependant on state and local government actions.

Increased levels of connectivity to, from and within the study area would likely result in an increase in land values. Increased connectivity means that more residents and visitors to the area will be able to access key services and facilities with greater ease, and increased demand for residential development is expected to result. At present residents are drawn to the area by the semi-rural lifestyle, and natural amenity, however many people still value accessibility to jobs and local retail and commercial services. The improved rail service will facilitate residents working in major centres to the south, while increasing residential population and businesses will drive demand for retail and commercial services.

#### **Reuse of existing corridor**

Once the new rail corridor is developed and operating the existing corridor will become obsolete for the use of rail transport. However, in some sections the new corridor incorporates the old corridor. Where obsolete, the existing corridor may be used for a number of purposes, which may provide benefits for the areas. Reuse of the existing corridor should take into account social factors and community values. Options include revegetation to improve ecological values, or the development of a recreational 'rail trail', which may also provide access for commuters to the rail stations. It has been demonstrated that there are significant benefits (social, environmental, and economic) associated with 'rail trails', and particularly potential tourist attraction and tourist spending in the area (Beeton, 2003). The Active Trails Strategy, (2007) compiled by the Office of Urban Management (now DIP), contains plans for significant regional trails, including rail trails. A number of rail trails have already been developed in the Brisbane Valley. The rail trail may even be developed as an attraction in itself. However, this would depend on it being part of a larger regional trail network, and incorporating interpretive features such as historical information, and reuse of old railway stations.

The obsolete rail corridor could be used as a trail between just north of Mooloolah and Palmwoods without crossing the new line. At Palmwoods any trail may be forced to return to shared road use (to provide controlled crossing of the new rail line). The trail could continue just north of Palmwoods to just north of Woombye (except for one small section just south of Woombye that may require additional land).

The economic benefits of any rail trail are dependant on the final trail that is developed, associated tourist opportunities and the cost of construction and maintenance. There are also wider economic benefits of local accessibility via the rail trail. The development of a rail trail would need to be subject to a separate feasibility study and business planning.

## Effects of improved transport

Improved transport within the area is expected to result in higher levels of professional workers living within the study area (see Generation of Employment) due to the combination of lifestyle and accessibility. The project may attract knowledge based workers and creative industries. Increased economic activity within the study area will occur as a result of this. Improved transport must be met with increased connections to key destinations within the study area. The enhanced railway service is expected to result in higher levels of use from existing residents, employees of businesses, and new residents (attracted in part by the convenience of high quality rail service). The expected higher level of patronage presents opportunities for convenience type businesses near the rail station. While higher levels of residential population will have broader consumption based flow on spending benefits for the study area economy. The potential for increased business activity through increased rail patronage could be enhanced through good urban design outcomes associated with the project (relocation of stations, new pedestrian/cycle access, new road works, and grade separated crossings) and council initiatives. This includes good visual outcomes of works associated with the project, maintaining the character of the rail towns, improved accessibility (physical and visual) between the station and businesses. Council street scaping initiatives could also assist in this regard.

The improved rail service is designed to deliver travel time savings for the freight services that use the line. The benefits in time savings for freight services will be enhanced by the increased capacity generated, which is dependant on the operation of the whole network and inter-modal facilities.

### 8.6.2 Mitigation

#### Direct property impact on businesses

The cost of construction will be the most significant cost of the project and this includes acquisition of land for the new corridor. The loss and/or relocation of certain businesses is a particular concern for those businesses and local community members in the study area. The most affected towns are Nambour (mainly industrial uses), and Mooloolah (town centre businesses). In Palmwoods the project has some impact on the bowls club while, in Eudlo, Woombye, and Landsborough there are no direct impacts on commercial uses.

Loss of businesses could impact on the ability of the rail towns to service local needs and could result in movement to services in other centres. It is important that viable and attractive options exist for businesses to relocate to another part of town. This depends on the availability of appropriately zoned land, good accessibility, and good commercial location (visibility and amenity). It is important to consider the availability of land to replace commercial land acquired for the rail project. Local Government Authorities should work with the State to identify good locations where required, and these should encourage

strong businesses, maintain the function of rail towns, provide access to goods and services, and promote a strong social realm. In addition to providing options for relocation, affected businesses should be given ample time and accurate information about the project to encourage confidence in their relocation to another part of town.

It is also important in supporting businesses to provide a good quality physical environment particularly for those having to relocate. This includes good visual amenity, maintaining town character, and a high level of visibility and good accessibility (car, pedestrian, cycling, and links to the rail station).

#### Construction impacts

The construction phase of the project is expected to result in adverse impacts including restricted access, (to businesses, stations, and houses), and reduced amenity (noise, dust). These impacts (depending on their duration and severity) would be expected to have a significant economic impact on businesses. Therefore, care should be taken to limit construction impacts as much as practical. This is discussed in more detail in Chapter 15, Noise and vibration, Chapter 16, Air quality and Chapter 22, Environmental management plans.

## 8.7 Summary and conclusions

The project will have a significant economic benefit for South East Queensland and Queensland through the injection of project spending into the economy. Localised economic impacts focus around the disruption to the commercial centres of some of the rail towns. The adverse impacts need to be carefully managed while benefits can be enhanced through specific strategies. Key benefits of the project include:

- a total of \$3.2 billion of output generation into the SEQ economy over the entire construction period (seven years), and a total of 1,928 jobs on average at any point in time
- a total of \$4.57 billion of output generation into the Queensland economy (including SEQ) over the entire construction period (seven years) and a total of 2,786 jobs on average at any point in time
- savings in time taken to travel for commuters, local passengers, long distance tourist trips and freight
- savings in private vehicle operation costs and reduction in the growth of road accidents
- improvements in the overall public transport network
- enhancement of local business opportunities, and employment clusters
- improved social connectivity.

The potential adverse impacts of the project are primarily related to direct property impacts which would require businesses to relocate or close, and construction impacts on business resulting in lost trade, and the potential loss of amenity and character

which act as drawcards for local town centres. In order to achieve the best possible economic outcome from the project, the following actions are suggested:

- Local job opportunities should be provided where ever possible and training provided to boost this through a Skills Development Plan as required under the State's 10% policy. This should include co-ordination with local training institutions.
- Local businesses should be utilised where possible through a Local Industry Participation Plan (under the Local Industry Policy).
- Local business capacity should be enhanced where possible with strategies to maintain capacity following construction.
- Strategies should target small to medium enterprises to locate in the area to take advantage of the enhanced rail service and lifestyle attractions. This should be supported through high quality information technology services.
- An Accommodation Strategy should seek to enhance use of local rental and short term accommodation, and limit adverse impacts e.g. inflated rents, loss of tourist capacity.
- Local towns should seek to improve tourist services that can be accessed via rail. This includes arts, crafts, local history, character and natural attractions.
- The development of a 'rail trail' could benefit the area in terms of local accessibility and potentially as a tourist attraction (in combination with local overnight stays).
- Construction around town centres should be limited in the duration.
- Works in town centres should attempt to enhance local accessibility, character and amenity to benefit businesses and encourage relocation within the town for those subject to land acquisition.
- Businesses with direct property impacts should be given best possible information to allow strategies for relocation if possible.