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Regional Development Australia
MORETON BAY AND SUNSHINE COAST

Regional Development Australia Moreton Bay Sunshine Coast

Shaping the Future: Insights Report

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April 2026

Acknowledgments

UTS acknowledges the Gadigal people of the Eora Nation, the Boorooberongal people of the Dharug Nation, the Bidiagal people and the Gamaygal people, upon whose ancestral lands our university stands. We would also like to pay respect to the Elders both past and present, acknowledging them as the traditional custodians of knowledge for these lands.

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UTS CRICOS Provider Code: 00099F

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The RDAMBSC Board

The Moreton Bay and Sunshine Coast Regional Development Australia (RDAMBSC) Board comprises professionals with technology, business, property, law, agriculture, health, community services and architecture expertise. This team combines decades of leadership, advocacy and practical experience to advance the region's economic growth, sustainability and innovation vision.

The Board's strength is its ability to blend strategic foresight with practical execution. Its focus is on supporting the transformation of the region into a dynamic, high value economic hub. A key part of its strategy is fostering a digital economy through advocating for technological advancements and a robust digital infrastructure to support a knowledge-based economy.

Sustainability and environmental stewardship are central to the RDAMBSC's mission. The board champions initiatives that preserve natural assets, reduce carbon emissions and integrate green technologies into urban development. This approach extends beyond conservation, to promoting a circular economy and creating communities resilient to climate challenges.

Infrastructure development is also a key priority. The RDAMBSC supports investments to create vibrant urban centres that boost economic activity and community wellbeing and in transport networks that enhance regional connectivity.

Innovation and entrepreneurship are deeply embedded in the RDAMBSC's agenda, particularly through partnerships between academia, industry and government to create an ecosystem that supports start-ups and high-growth sectors. The goal is to leverage its strengths to position the region as a leader in digital and creative industries.

The RDAMBSC is equally committed to community and social impact. It advocates for inclusive growth that provides opportunities for all residents by supporting initiatives in affordable housing, community health and cultural engagement.

Good governance is fundamental to the RDAMBSC's work. With a focus on legal frameworks, corporate governance and policy development, the board ensures all initiatives align with best practices. Members prioritise transparency, accountability and a culture of collaboration.

In summary, the RDAMBSC's vision is to guide the Moreton Bay, Noosa and Sunshine Coast regions towards sustainable prosperity. It aims to balance economic development with environmental preservation and community wellbeing. The goal is to combine technological advancement, infrastructure development and social inclusion, positioning the region as a forward-thinking, globally competitive destination ready for the future.

Summary

The RDAMBSC

The Moreton Bay and Sunshine Coast RDA (RDAMBSC) comprises the Local Government Areas (LGAs) of Moreton Bay, Sunshine Coast and Noosa.

Each Councils' Annual Report highlights sustainability, infrastructure development, community wellbeing and good governance as central to their strategies, underpinned by a strong emphasis on enhancing quality of life for residents.

Reflecting differences across the RDA, there is also some diversity in individual council's approaches to issues such as environmental management, economic and cultural strategies and housing affordability.

About the report 2026

This report was first released in early 2025. The present version is an April 2026 update. It refreshes current-series data where newer official releases are available, while retaining 2021 Census tables as the baseline structural profile of the region.

The report draws primarily on official sources, including the Australian Bureau of Statistics, the Queensland Government Statistician's Office, Jobs and Skills Australia, Housing Australia, the Queensland Government and current Moreton Bay, Sunshine Coast and Noosa council publications. economy.id material is used selectively as a secondary regional profiling source and is identified as such where relied upon

Regional Profile

The following highlights some key characteristics of the RDAMBSC and member LGAs.

- **Regional Growth:** The region is experiencing significant population growth, driven by internal migration, urban development and economic opportunities. It is projected to reach a population of 1.309 million by 2041, with Moreton Bay leading this trend due to its affordability and proximity to Brisbane.

  Recent migration indicators reinforce this trajectory. In the 12 months to December 2025, the Sunshine Coast recorded the largest share of total net internal migration to regional Australia (8.9%), according to the Regional Australia Institute and Commonwealth Bank Regional Movers Index. This suggests the region continues to attract both capital-city and regional movers, with direct implications for housing demand, labour supply and infrastructure pressure.

- **Economic Profile:** Key sectors driving regional economic development include healthcare, construction, tourism, advanced manufacturing, agriculture and the digital economy. The healthcare and social assistance sector is the largest contributor, influenced by an ageing population, followed by construction, which is being propelled by infrastructure development.

- **Industry Specialisation:** The region is focusing on transitioning to high value industries, particularly advanced manufacturing, digital technologies and the experience economy (eco-tourism and wellness tourism).

  Investment in innovation districts and hubs are also recognised as vital for sustaining economic growth.

- **Innovation and Technology:** The region is fostering a culture of innovation by promoting digital infrastructure, encouraging technological integration across sectors and supporting start-ups through incubation and partnership with educational institutions like the University of the Sunshine Coast (UniSC).

  It also has the advantages that accrue from the presence of fast international network connection points, thanks to the submarine cables.

- **Sustainability and Climate Action:** Sustainability is a core theme, with efforts focused on promoting a circular economy, reducing carbon emissions and integrating green technologies into urban development. The region has strong initiatives in renewable energy, conservation and eco-tourism, particularly in areas like Noosa and Sunshine Coast which contain recognised UNESCO Biosphere Reserves.

- **Demographic Diversity:** The region's population includes a mix of young families, professionals and retirees, contributing to varying needs in housing, healthcare and employment. Moreton Bay attracts younger demographics due to affordable housing, while Noosa appeals to retirees seeking eco-friendly living.

- **Community and Lifestyle:** Residents place a high value on work-life balance, outdoor recreation and community engagement. Activities such as hiking, cycling and surfing are popular, especially in areas with significant natural attractions like the Sunshine Coast and Noosa.

- **Employment and Workforce Dynamics:** The region faces skills shortages in key areas such as healthcare, construction and digital technologies. Efforts are being made to address these gaps through targeted educational collaborations, vocational training and workforce development initiatives.

- **Infrastructure and Connectivity:** Improving regional transport networks, public spaces and digital connectivity is an identified priority. There is a focus on creating vibrant urban centres and enhancing infrastructure to support economic activity and quality of life.

Opportunities for RDAMBSC

- The RDAMBSC has a solid foundation in construction, healthcare, tourism and manufacturing, coupled with a growing innovation ecosystem. The area's natural assets and commitment to sustainability make it well-positioned to lead in eco-tourism and health innovation.

- The region has been particularly effective in promoting digital infrastructure, supporting start-ups and building partnerships between academia, industry and government. The focus on green technologies and resilience planning is generating a significant competitive advantage.

Specific industries with further growth potential include:

- **Advanced Manufacturing:** Strengthening the region's capabilities in advanced manufacturing through investment in digital technologies, clean tech and automation will create high value jobs and attract new businesses.
- **Health and Biotechnology:** Expanding healthcare services and focusing on biotech innovation can meet the demands of an ageing population while positioning the region as a leader in medical research and digital health.
- **Sustainable Tourism:** Promoting eco-tourism and wellness tourism that leverages the natural beauty of the region, alongside digital solutions for a seamless visitor experience, can differentiate the RDAMBSC region from other tourist destinations.

Broad sectors with further development potential could also include:

- **Innovation Ecosystem Development:** By fostering continued collaboration between universities, research institutions and businesses to support start-ups and scale-ups.
- **Infrastructure and Connectivity:** Prioritising investments in transport and digital infrastructure to enhance regional connectivity and support future growth.
- **Climate Resilience and Sustainability:** Advance initiatives in renewable energy, sustainable urban development and climate adaptation strategies to build a resilient region that attracts eco-conscious investments.

Drawing on Lessons from Other Regions

An analysis of Australian and international locations comparable to the RDAMBSC identified several cases that offer guidance.

- **Australian Comparators:** Similar regions such as the Gold Coast, Geelong-Bellarine and Margaret River-Busselton have successfully leveraged tourism, advanced manufacturing and innovation hubs to drive regional growth. Common strategies include strong investment in digital infrastructure, fostering eco-tourism and building collaborative innovation ecosystems.
- **International Comparators:** Regions such as New Zealand's South Island, Sarasota in Florida and Spain's Costa del Sol provide valuable lessons in sustainable tourism, innovation-driven economic models and balancing environmental conservation with urban development.
- **Key Takeaways for RDAMBSC:** Successful regions often combine a focus on high value industries with strong community engagement and sustainability initiatives. Investment in infrastructure, digital connectivity and innovation ecosystems are common themes that drive lasting economic impact.

1. A Region in Transition

The RDAMBSC region has long been synonymous with stunning coastlines, world-class natural attractions and a thriving tourism industry. However, in recent years, the region has begun an ambitious transformation from its traditional identity as a tourist destination into an advanced technology and innovation hub.

1.1 Towards a More Diversified Economy

This shift is being driven by strategic investments in infrastructure, education and industry collaboration, positioning the region as a national leader in high-tech industries and innovation-led growth.

Central to this transformation is a coordinated approach between local governments, the private sector and research institutions to foster a robust innovation ecosystem. At its heart is a clear commitment to fostering a diversified economy that extends beyond tourism. The region's focus has shifted towards sectors such as advanced manufacturing, digital innovation and sustainable technologies.

This includes the development of cutting-edge hubs like the Turbine Precinct at the Sunshine Coast Airport, designed to facilitate collaboration between businesses, researchers and entrepreneurs and support growth in sectors such as food and beverage manufacturing, digital innovation and clean energy technologies.

Educational institutions, including the University of the Sunshine Coast, TAFE and VET, are playing a critical role by providing talent pipelines and research partnerships that fuel the region’s innovation ecosystem. At this stage, however, no Commonwealth Department of Education supported Regional University Study Hubs are located in the RDAMBSC region.

The presence of high-speed digital infrastructure, such as the international submarine data cables is providing businesses with the connectivity required to compete globally.

The region's unique combination of high quality of life, proximity to Brisbane and strong links to global markets makes it an attractive location for talent and businesses looking to innovate. Sectors such as aerospace, biotechnology and clean technology are now playing a more prominent role in the local economy, complementing the long-established industries of agriculture and tourism.

As the transformation accelerates, RDAMBSC is poised to become a regional leader in innovation, advancing both its economic development and its position on the global stage.

This report explores how the RDAMBSC is leveraging these developments to create a high-growth, future-oriented economy. By nurturing innovation and fostering collaboration between public and private sectors, RDAMBSC is positioning itself as a major player in Australia’s advanced technology landscape, setting the stage for long-term economic resilience and global competitiveness.

From Tourism to Tech: Expanding the RDAMBSC Economy

The RDAMBSC is at a pivotal moment in its economic evolution. Tourism has long been a cornerstone of the region's economy, generating substantial employment and revenue, particularly through its pristine beaches and eco-tourism attractions. However, the sector's vulnerability to external shocks, such as the COVID-19 pandemic, underscores the need for economic diversification.

The transition from "Tourism to Tech" encapsulates the region's emerging opportunity to cultivate a technology-driven economy. Leveraging its existing strengths — natural assets, quality of life and community engagement — RDAMBSC can create a more resilient economic future through strategic investments in technology, innovation and industry diversification.

This requires a multifaceted strategy. Building an innovation ecosystem, including tech incubators and research partnerships, is essential, as is developing a skilled workforce with a focus on digital, advanced manufacturing and healthcare technology capabilities. Investment in digital infrastructure, particularly high-speed internet and 5G, will ensure the region remains competitive in the global digital economy.

The transition must be inclusive and sustainable. By prioritising green technologies and maintaining a strong focus on environmental sustainability, RDAMBSC can align its economic goals with global sustainability standards, ensuring long-term prosperity for the community.

In this transformative phase, RDAMBSC stands poised to evolve from a tourism-dependent economy to a diversified, future-ready, tech-enabled regional leader.

1.2 RDAMBSC and Council Economic Development Plans

The RDAMBSC and the three constituent Councils currently have active economic development and related strategic plans. Taken together, they present a holistic vision for transforming RDAMBSC into a high value, future-ready region.

For the Sunshine Coast in particular, the most recent Regional Economic Development Strategy reporting points to continued structural transition. Council reports that the Sunshine Coast economy reached $26.33 billion in 2024 and that high-value industries are now providing more than 112,000 employment opportunities, indicating that the diversification agenda is producing measurable results and is now materially shaping the regional economy.

The themes, insights and actions that emerge from the plans are captured below.

- **Regional Development and Economic Growth:** To shift the region's economic bases towards more diversified, resilient and innovation-driven industries. This is the primary theme in each Council's and the RDAMBSC's strategic documents.
- **Innovation and Technological Advancement:** Fostering a culture of entrepreneurship and increase the adoption of advanced technologies across sectors is a central theme.

- **Skills and Workforce Development:** The documents consistently convey the importance of a skilled workforce aligned with the needs of industry and particularly high value industries.
- **Community and SME Support:** Support for small and medium-sized enterprises (SMEs) is a crucial priority in the strategic plans, emphasising inclusivity and diverse community engagement.
- **Event and Tourism Strategies:** Major events and tourism are identified as key drivers for establishing the region as hosts of dynamic destinations.
- **Collaboration and Advocacy:** The strategic documents underscore the importance of a unified approach to regional collaboration and advocacy to achieve economic objectives.

Further comment is provided in

Table 1.

Table 1: Themes, insights and actions that emerge from council strategic plans

Industry focus	Themes	Actions
	Regional Development and Economic Growth	
High Value Industries	Priority sectors include advanced manufacturing, food and agribusiness, knowledge and innovation and digital technology. These industries are seen as catalysts for job creation and economic growth.	Councils are advancing ambitious Regional Economic Development Strategies to grow their economies through job creation, attracting businesses, fostering knowledge-based and innovation-driven sectors, infrastructure projects and leveraging the 2032 Olympics to boost tourism and economic growth while maintaining their unique lifestyles and natural assets
Infrastructure Investment	Emphasising transport infrastructure, logistics capabilities and digital connectivity to support industrial development and regional integration.	
Green Economy and Sustainability	Strategies include leveraging the regions' biosphere designation and promoting eco-friendly community and business development practices to attract sustainable investments.	
	Innovation and Technological Advancement	
Technological Integration	The focus is on adopting digital technologies like artificial intelligence (AI), robotics and the Internet of Things (IoT) to streamline processes and boost productivity.	Actions are in train to establish innovation hubs and incubators to facilitate knowledge-sharing and accelerate technology adoption and promote partnerships with industry leaders to support research and development in advanced technologies.
Ecosystem Collaboration	Building a cohesive ecosystem involving educational institutions, businesses and government agencies to support start-ups and innovation-driven enterprises.	
Digital Creative Precincts	Initiatives like NEO at UniSC aim to position the Sunshine Coast as a hub for immersive reality and augmented digital entertainment.	
	Skills and Workforce Development	
Upskilling and Training	Emphasis on digital skills development, advanced manufacturing competencies and career pathways to ensure a future-ready workforce.	Actions are being taken to implement comprehensive training programs in emerging technologies and high demand skills and develop initiatives to repatriate talent to the region,
Educational Collaborations	Strong partnerships with institutions like UniSC and TAFE Queensland to deliver specialised training programs and workforce development initiatives.	

Industry focus	Themes	Actions
Talent Attraction and Retention	Strategies to attract skilled professionals to the region while fostering local talent through targeted educational opportunities.	enhancing the local innovation ecosystem.
	Community and SME Support	
Resource Guides and Mentorship	Programs like the "Level Up Your Business Resource Guide" offer SMEs resources, mentorship and grant opportunities to stimulate growth and innovation.	Councils are enhancing support structures for SMEs, providing access to funding, mentorship and networking opportunities and promoting community-driven initiatives that empower local businesses to scale and innovate.
Support for Diverse Communities	A focus on engaging First Nations businesses and culturally diverse groups to ensure equitable economic opportunities across the region.	
	Event and Tourism Strategies	
Leveraging the 2032 Brisbane Olympics	Using the Olympics as a catalyst for boosting infrastructure, promoting tourism and attracting global investments.	Councils are implementing targeted marketing campaigns to position Moreton Bay and Sunshine Coast as leading event destinations and strengthening collaborations with state and national agencies to attract high-profile events and tourism investments.
Diverse Events Calendar	Developing a well-rounded events calendar that includes sports, cultural festivals and business conferences to engage the community and increase economic impact.	
	Collaboration and Advocacy	
One Voice Strategy	Advocating for a collective regional voice to drive policy changes, secure funding and promote the regions' economic potential.	Councils are establishing a regional advocacy framework to engage state and federal governments on critical infrastructure and economic policies and fostering partnerships that amplify the regions' visibility in national and international markets.
Stakeholder Engagement	Active involvement with local councils, government agencies and industry partners to align strategies and share resources for regional development.	

Source: UTS analysis of Council Regional Economic Development Plans

2. Geography

The RDAMBSC covers a dynamic growth corridor in South-East Queensland.

With rapid urban expansion, significant migration and sectoral diversification, the region is becoming a critical part of Queensland's economic engine. The following regional analysis examines demographics, infrastructure development, economic sectors and emerging opportunities and challenges.

The region is characterised by diverse coastal, hinterland and national park environments, contributing to its unique environmental and recreational appeal. A substantial proportion of the area is dedicated to national parks and other conservation areas. These attributes are summarised in Table 2.

Table 2: Key Topographical Feature

LGA	Area (sqkm)	Key Topographical Features.	National Parks Areas
Moreton Bay	2,073	Predominantly residential and agricultural land with significant urban centres in areas like Redcliffe and Caboolture. Extensive coastal areas, wetlands and environmental reserves. Growth corridors accommodate urban expansion, while rural areas focus on agriculture, particularly in the northern sections.	Gheebulum Kunungai (Moreton Island) National Park covers a significant area of Moreton Island, which itself is an important conservation zone within Moreton Bay. The park includes extensive sandy beaches, coastal health and unique ecosystems.
Sunshine Coast	2,291	A mix of urban, agricultural and protected land. Coastal areas are densely urbanised, while the hinterland is used for farming (particularly dairy and horticulture).	This region has a network of national parks covering about 56,000 hectares, including the Glass House Mountains, Great Sandy and Kondalilla National Parks.
Noosa	871	The hinterland includes rolling hills, small mountain ranges and significant national parks that support varied wildlife and vegetation. Strong emphasis on environmental conservation. Coastal zones are heavily used for tourism and residential development, while the hinterland supports smaller-scale agriculture and rural residential areas.	The Noosa National Park covers over 4,000 hectares, making it a major protected area in the region. With additional conservation areas like Tewantin and Emu Mountain sections, Noosa has a high proportion of its land dedicated to environmental protection, which plays a central role in its eco-tourism strategy.
Regional Total	5,235		

Source: CLG analysis of publicly available information

3. Statistical Overview

3.1 People and Population

Cities and Towns

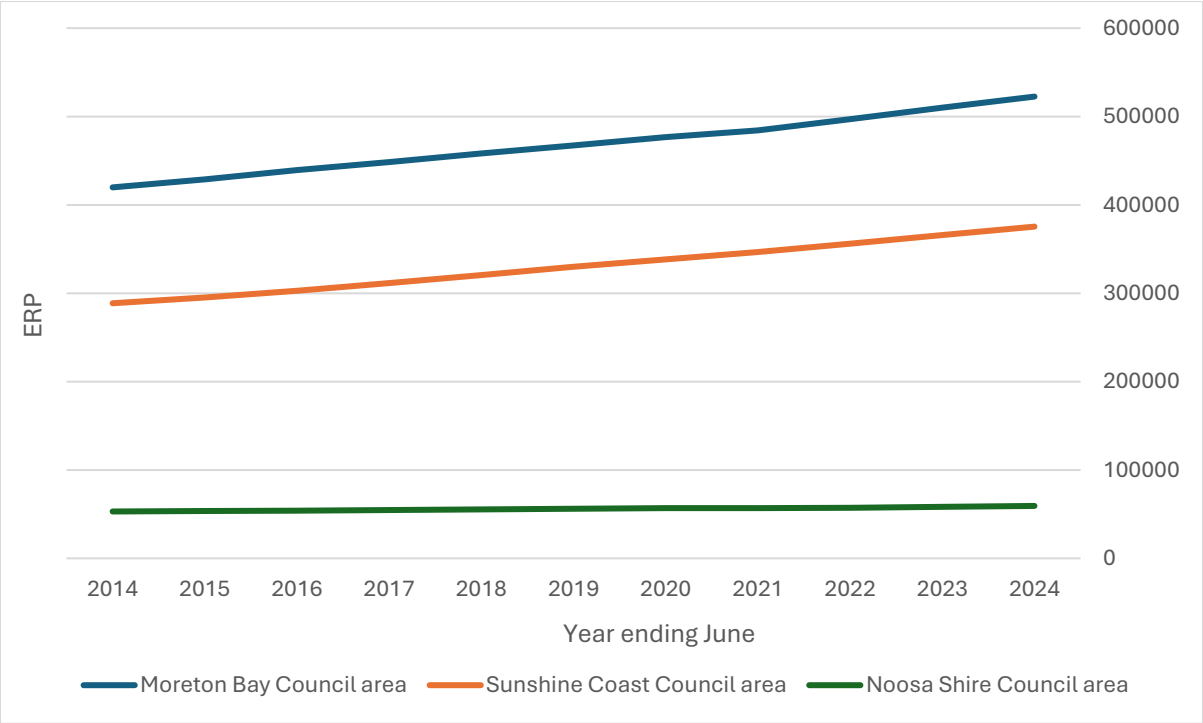
Based on ABS Statistical Area Level 3 coverage in the 2021 Census, there are substantial population concentrations in the RDAMBSC region at Caloundra (96,305), Caboolture (79,787), and Strathpine (39,846).

Resident Population

ABS Regional population data indicates that the population of the RDAMBSC increased from 761,204 in 2014 to 973,953 in 2025, an increase of 27.95 per cent. The combined region grew from 954,807 in 2024 to 973,953 in 2025, an annual increase of 19,146 people (2.0 per cent). Longer-run profile trends to 2024 are shown in Figure 1.

At 30 June 2025, official ABS local government area populations were 532,445 for Moreton Bay, 381,957 for Sunshine Coast and 59,551 for Noosa.

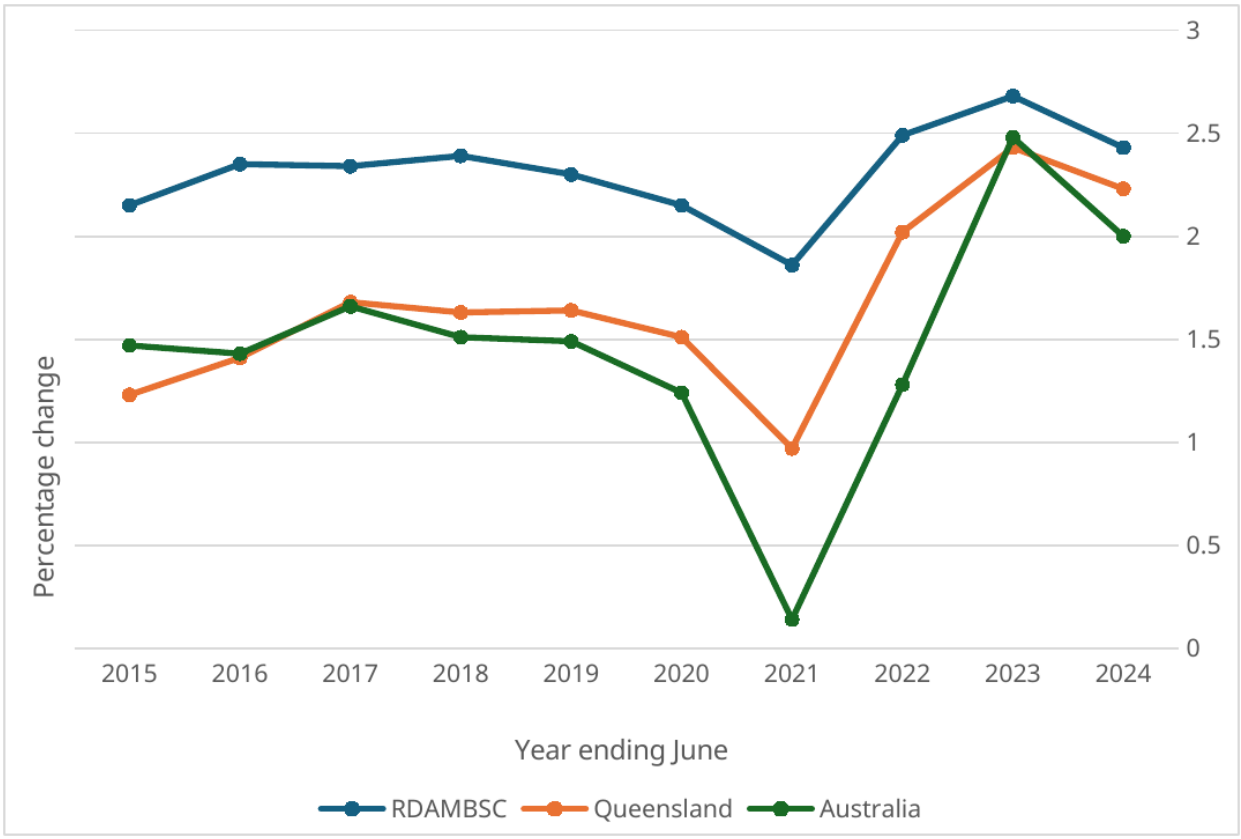
Figure 1: Estimated Resident Population (ERP) (2014-2024)



Source: economy.id, RDA Moreton Bay Sunshine Coast Economic Profile, Estimated Resident Population series, accessed 1 April 2026.

Population growth has fluctuated widely on a year-on-year basis, as shown in Figure 2.

Figure 2: Annual growth rates in resident population (2015-2024)



Source: economy.id, RDA Moreton Bay Sunshine Coast Economic Profile, annual growth rate series, accessed 1 April 2026.

Indigenous Status

Data from the 2021 Census reveals distinct patterns of Indigenous population distribution across the RDAMBSC. Moreton Bay shows the highest Indigenous representation at 3.9%, more closely aligned with Queensland's 4.6% and Australia's 3.2%, while figures decrease northward with the Sunshine Coast at 2.4% and Noosa at 1.7%.

Table 3: Indigenous Status

	Moreton Bay		Sunshine Coast		Noosa		Queensland		Australia	
	No	%	No	%	No	%	No	%	No	%
Aboriginal and/or Torres Strait Islander	18,616	3.9	8,332	2.4	933	1.7	237,303	4.6	812,728	3.2
Non-Indigenous	438,442	92.0	318,268	92.9	52,467	93.2	4,635,042	89.9	23,375,949	91.9
Indigenous status not stated	19,282	4.0	15,947	4.7	2,903	5.2	283,793	5.5	1,234,112	4.9

Total	476,140	100.0	342,547	100.0	56,303	100.0	5,156,138	100.0	25,422,789	100.0

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Notably, the proportion of unstated Indigenous status ranges from 4.0% in Moreton Bay to 5.2% in Noosa, representing a significant demographic requiring consideration in policy planning.

Projected Population Growth

Queensland Government “medium” growth population projections suggest that the population of the RDAMBSC will reach 1.309 million by 2041 and 1.408 million by 2046. Growth will be driven by internal migration, urban development and economic opportunities.

- Moreton Bay: Projected to grow to 734,943 by 2041, driven by ongoing residential development and infrastructure projects. This represents an annual growth rate of around 1.5-2.0%.
- Sunshine Coast: Expected to reach a population of 509,159 by 2041, supported by growth in healthcare, digital economy and tourism.
- Noosa: With its strict environmental controls, Noosa is projected to grow slower, reaching 64,822 by 2041.

These trends are shown in

Table 4 and

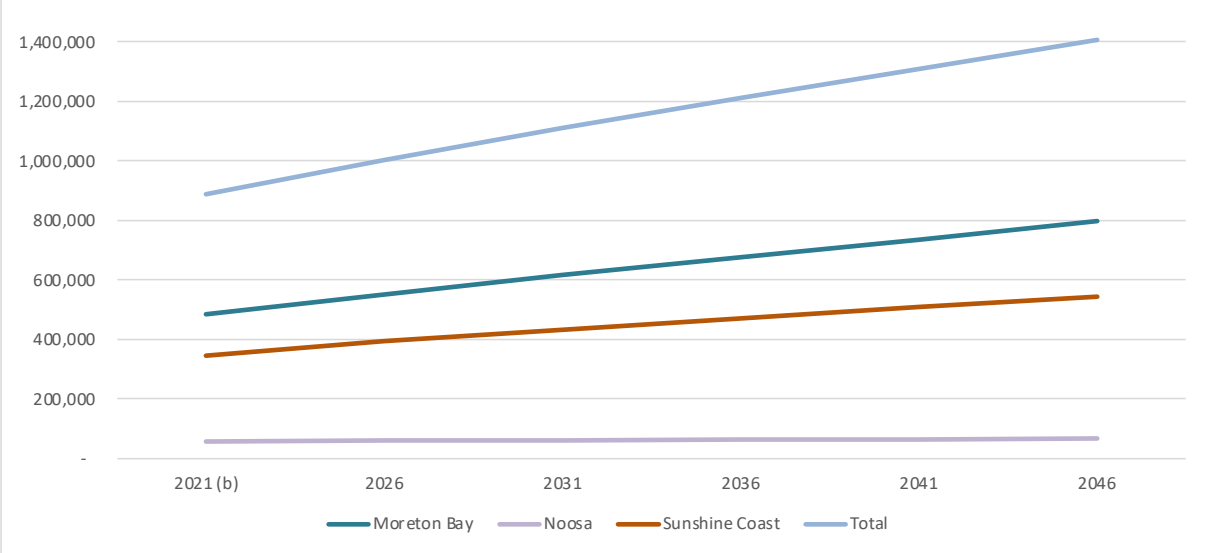
Figure 3.

Table 4: Projected Population Growth (2021-2046)

	2021 (b)	2026	2031	2036	2041	2046	***Increase 2021-2046***
Moreton Bay	484,428	551,701	618,535	676,171	734,943	796,515	*64.4%*
Noosa	56,873	59,628	61,740	63,425	64,822	65,989	*16.0%*
Sunshine Coast	346,648	392,711	432,454	471,366	509,159	545,523	*57.4%*
Total	**887,949**	**1,004,040**	**1,112,729**	**1,210,962**	**1,308,925**	**1,408,028**	***58.6%***
Queensland	*5,217,653*	*5,663,247*	*6,079,887*	*6,492,441*	*6,899,969*	*7,299,934*	*39.9%*

Source: Queensland Government Statistician's Office (QGSO), population projections, local government areas, 2023 edition (medium series).

Figure 3: Projected Population Growth (2021-2046)



Source: Derived from Queensland Government Statistician's Office (QGSO), population projections, local government areas, 2023 edition (medium series).

Age distribution

Table 5 and Figure 4 reveal distinct demographic patterns across the RDAMBSC, with notable variations in age structure between the three local government areas. These patterns demonstrate a clear coastal-aging phenomenon, particularly pronounced in Noosa, and Moreton Bay's emergence as a hub for younger families.

The data reveals:

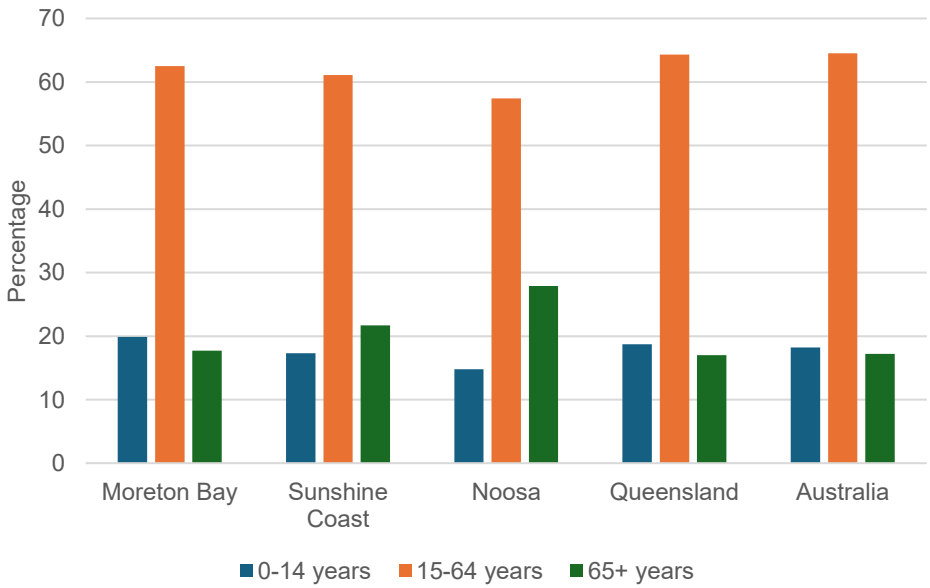
- Noosa presents the most striking age profile, with a median age of 50 years and the highest proportion of older persons (65+ years) at 27.9% of its population. This is substantially higher than both the Queensland (17.0%) and national (17.2%) averages. Correspondingly, Noosa has the lowest proportion of children (0-14 years) at 14.8%, well below the state average of 18.7%.
- The Sunshine Coast is in an intermediate position in this demographic spectrum, with a median age of 43 years. Its age structure shows a moderate concentration of seniors (21.7%) and a working-age population (61.1%) that sits below both state and national averages. The proportion of children (17.3%) aligns more closely with state and national patterns, though still falling short of these benchmarks.
- Moreton Bay has the youngest profile of the three regions, with a median age of 39 years. Its age structure more closely resembles state and national patterns, particularly in the proportion of older persons (17.7%). Notably, Moreton Bay has the highest proportion of children (19.9%) among the three regions, exceeding both Queensland (18.7%) and national (18.2%) averages. This suggests its role as a preferred location for families with children.
- The "working age" population (15-64 years) shows a consistent pattern of decline moving north along the coast, from 62.5% in Moreton Bay to 57.4% in Noosa. This trend may have significant implications for local economic capacity and service delivery requirements across the region.

Table 5: Age Distribution

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No.	%	No.	%	No.	%	%	%
Median age	39	N/A	43	N/A	50	N/A	N/A	N/A
0-4 years	28,365	6.0	16,934	4.9	2,010	3.6	5.7	5.8
5-9 years	32,278	6.8	20,331	5.9	2,878	5.1	6.4	6.2
10-14 years	33,811	7.1	22,234	6.5	3,461	6.1	6.6	6.2
Total	***94,493***	***19.9***	***59,542***	***17.3***	***8,399***	***14.8***	***18.7***	***18.2***
15-19 years	30,026	6.3	20,081	5.9	3,039	5.4	6.1	5.7
20-24 years	27,256	5.7	17,308	5.1	1,939	3.4	6.3	6.2
25-29 years	28,389	6.0	18,079	5.3	1,855	3.3	6.7	7.0
30-34 years	30,122	6.3	19,725	5.8	2,270	4.0	6.9	7.3
35-39 years	31,708	6.7	21,302	6.2	2,760	4.9	6.9	7.2
40-44 years	30,946	6.5	21,078	6.2	3,222	5.7	6.4	6.5
45-49 years	32,170	6.8	22,999	6.7	4,011	7.1	6.6	6.4
50-54 years	31,448	6.6	22,975	6.7	4,153	7.4	6.5	6.3
55-59 years	28,659	6.0	22,573	6.6	4,430	7.9	6.1	6.1
60-64 years	26,873	5.6	22,613	6.6	4,657	8.3	5.8	5.8
Total	***297,597***	***62.5***	***208,733***	***61.1***	***32,336***	***57.4***	***64.3***	***64.5***
65-69 years	25,119	5.3	20,986	6.1	4,482	8.0	5.1	5.1
70-74 years	23,956	5.0	20,099	5.9	4,495	8.0	4.6	4.6
75-79 years	16,809	3.5	14,677	4.3	3,135	5.6	3.3	3.2
80-84 years	9,904	2.1	9,493	2.8	1,892	3.4	2.1	2.2
85 years and over	8,506	1.8	9,058	2.6	1,611	2.9	1.9	2.1
Total	***84,294***	***17.7***	***74,313***	***21.7***	***15,615***	***27.9***	***17.0***	***17.2***

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Figure 4: Age Distribution



Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Marital Status

A profile of marital status is presented in Table 6. It reveals that Noosa, Sunshine Coast and Moreton Bay all show higher marriage rates than state and national averages, with Noosa leading at 50.8%.

Table 6: Registered Marital Status

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No	%	No	%	No	%	%	%
Married	179,751	47.1	137,455	48.6	24,344	50.8	45.0	46.5
Separated	15,070	3.9	9,754	3.4	1,467	3.1	3.6	3.2
Divorced	38,237	10.0	30,918	10.9	5,771	12.0	9.7	8.8
Widowed	18,798	4.9	15,332	5.4	2,830	5.9	4.7	5.0
Never married	130,022	34.0	89,587	31.7	13,538	28.2	34.0	36.5

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note: In December 2017, amendments to the Marriage Act 1961 came into effect enabling marriage equality for all couples. For 2021, registered marriages include all couples. Data relates to people aged 15 Years and Over

The region also recorded lower proportions of never-married individuals compared to the Australian average of 36.5%, with a clear geographic gradient from Moreton Bay (34.0%) to Noosa (28.2%).

Divorce rates in all three regions exceed state and national figures, with Noosa recording the highest at 12.0%. These patterns suggest unique social and demographic characteristics in these communities, potentially influenced by age structure, lifestyle preferences and migration patterns.

People Attending an Education Institution

The ABS Census collects information on people attending an education institution and the type of institution they are attending. This information for the RDAMBSC region and compared to Queensland as a whole and Australia is provided in Table 7.

The data indicates that the proportion of people participating in higher education is lower in the three RDAMBSC LGAs than for Queensland and Australia as a whole.

Table 7: People Attending an Education Institution

	Moreton Bay		**Sunshine Coast**		**Noosa**		**Queensland**	**Australia**
	No.	%	No.	%	No.	%	%	%
Preschool	8,506	6.1	5,490	5.7	678	4.8	5.4	6.3
Primary	42,466	30.5	26,952	28.0	3,852	27.2	27.1	27.0
Secondary	34,828	25.0	22,919	23.8	3,753	26.5	22.4	21.2
Vocational Education	9,953	7.1	6,527	6.8	862	6.1	7.0	7.8
Higher Education	15,874	11.4	13,138	13.7	1,271	9.0	14.2	15.4
Other	4,314	3.1	2,886	3.0	390	2.8	3.0	3.2
Not Stated	23,253	16.7	18,221	19.0	3,578	23.7	20.8	19.0

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Education Attainment

Table 8 provides information on the highest levels of education attainment across the region and compared with Queensland and Australia as a whole.

Table 8: Highest Level of Education (People 15 years & over)

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No.	%	No.	%	No.	%	%	%
Bachelor Degree level and above	65,353	17.1	60,818	21.5	10,957	22.9	21.9	26.3
Advanced Diploma and Diploma level	39,717	10.4	30,911	10.9	5,628	11.7	9.4	9.4
Certificate level IV	16,233	4.3	11,896	4.2	1,668	3.5	3.6	3.5
Certificate level III	67,220	17.6	46,911	16.6	7,361	15.4	15.3	12.6
Year 12	60,202	15.8	40,669	14.4	6,718	14.0	15.5	14.9
Year 11	16,167	4.2	11,478	4.1	1,994	4.2	3.9	4.6
Year 10	51,148	13.4	33,336	11.8	5,200	10.8	11.9	10.0
Certificate level II	272	0.1	176	0.1	30	0.1	0.1	0.1
Certificate level 1	40	0.0	31	0.0	5	0.0	0.0	0.0
Year 9 or below	26,982	7.1	16,206	5.7	2,436	5.1	6.7	7.2
Inadequately described	10,031	2.6	7,700	2.7	1,519	3.2	2.4	2.4
No attainment	1,251	0.3	526	0.2	68	0.1	0.5	0.8
Not stated	27,148	7.1	22,360	7.9	4,355	9.1	8.7	8.2

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

The data reveals distinctive patterns across the Region that differ from state and national profiles. Of note are:

- The varying proportion of residents with bachelor degrees or higher qualifications. Whilst Noosa (22.9%) and the Sunshine Coast (21.5%) align closely with Queensland averages, Moreton Bay demonstrates a markedly lower proportion at 17.1%, significantly below the national average of 26.3%.
- These Region has a particular strength in vocational education, with Certificate III qualifications notably higher than national averages. Moreton Bay leads this trend at 17.6%, followed by the Sunshine Coast at 16.6% and Noosa at 15.4%, all exceeding the national figure of 12.6%.
- Advanced Diploma and Diploma level qualifications also show consistency across the Region at approximately 10-11%, slightly higher than state and national averages.
- Year 12 completion rates demonstrate similar alignment with national trends, though Moreton Bay shows a slightly higher proportion at 15.8%.
- Notably, the Region displays lower proportions of residents with minimal educational attainment (Year 9 or below) compared to national figures, particularly in Noosa and the Sunshine Coast, suggesting relatively strong educational engagement across their populations.

3.2 Cultural Diversity

Ancestry

The RDAMBSC ancestry characteristics drawn from the 2021 Census are shown in Table 9. The patterns are quite distinctive, with Anglo-Celtic heritage notably stronger than national averages. English ancestry dominates at 42-46% compared to Australia's 33%, with Noosa showing the highest proportion.

Table 9: Main Ancestry Groups

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No	%	No	%	No	%	%	%
English	200,446	42.1	156,166	45.6	26,068	46.3	38.0	33.0
Australian	177,297	37.2	121,519	35.5	18,629	33.1	33.4	29.9
Irish	52,505	11.0	42,800	12.5	7,627	13.5	11.0	9.5
Scottish	51,604	10.8	42,225	12.3	7,494	13.3	10.2	8.6
German	28,663	6.0	22,539	6.6	3,532	6.3	6.0	4.0

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note 1: Respondents had the option of reporting up to two ancestries on their Census form, and this is captured by the Ancestry multi response (ANCP) variable used in this table. Therefore, the sum of all ancestry responses for an area will not equal the total number of people in the area.

Note 2: Calculated percentages represent a proportion of the number of people in the area (including those who did not state an ancestry). In 2016 QuickStats percentages were based on total number of responses and will not be comparable to this table.

Australian ancestry follows as the second most common identifier, ranging from 33-37%. Irish and Scottish connections are consistently higher than national figures, particularly in Noosa at around 13%. German heritage maintains a steady presence at 6% across all three LGAs exceeding the national average of 4%, reflecting enduring settlement patterns along Queensland's southeastern seaboard.

Country of Birth

Country of birth data from the Census are shown in Table 10. It reveals distinct migration patterns across the RDAMBSC region, with Australian-born residents comprising higher proportions (71-75%) than the national average (66.9%).

Table 10: Country of Birth

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No	%	No	%	No	%	%	%
Australia	355,678	74.7	254,478	74.3	40,091	71.2	71.4	66.9
New Zealand	23,135	4.9	14,563	4.3	2,243	4.0	4.0	2.1
England	22,529	4.7	20,153	5.9	4,233	7.5	3.7	3.6
South Africa	5,784	1.2	4,157	1.2	633	1.1	1.0	0.7
Philippines	5,178	1.1	n.r.		n.r.		1.0	1.2
India	5,078	1.1	2,332	0.7	n.r.		1.4	2.6
Scotland	n.r.		2,018	0.6	n.r.		0.4	0.5
Germany	n.r.		n.r.		521	0.9	0.4	0.4
United States	n.r.		n.r.		433	0.8	0.4	0.4

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

n.r. = not reported

The Region has a strong component of New Zealand-born residents at around 4-5%, more than double the national figure. English-born residents display an interesting “coastal gradient”, peaking in Noosa at 7.5%.

South African-born residents maintain a consistent presence across all regions at roughly 1.1%, while other migrant groups show specific regional concentrations, such as Filipinos in Moreton Bay and German and American-born residents in Noosa.

Country of Birth of Parents

Table 11 shows Census data reporting country of birth of parents. It reveals distinctive parental birthplace patterns across the region, notably diverging from national trends.

The LGAs show markedly lower proportions of residents with both parents born overseas (24-26%) compared to the national average (36.7%). Conversely, they demonstrate substantially higher rates of residents with Australian-born parents, ranging from 53.9% in Noosa to 56.8% on the Sunshine Coast, well above the national figure of 45.9%.

Table 11: Country of Birth of Parents

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No	%	No	%	No	%	%	%
Both parents born overseas	121,735	25.6	82,612	24.1	14,731	26.2	27.9	36.7
Father only born overseas	36,003	7.6	25,855	7.5	4,313	7.7	6.7	6.6
Mother only born overseas	27,159	5.7	20,347	5.9	3,321	5.9	5.3	4.9
Both parents born in Australia	266,303	55.9	194,683	56.8	30,322	53.9	53.4	45.9
Not stated	25,142	5.3	19,047	5.6	3,613	6.4	6.6	5.9

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note: For the 2021 Census, guidance was provided to respondents on how to answer for mother/father if their birth parent is unknown or they have same-sex parents.

The LGAs also display consistent patterns regarding single overseas-born parents, with father-only overseas birth at approximately 7.6% and mother-only at 5.8%. This suggests a unique regional demographic character balancing multi-generational Australian heritage with ongoing migration influences.

Religious affiliation

Table 12 shows reported religious affiliation from the 2021 Census. The data reveals distinctive religious patterns across the region, with notably higher proportions of residents identifying as having no religion compared to state and national averages. This secular trend peaks in Noosa at 48.2%, followed by the Sunshine Coast at 46.1% and Moreton Bay at 43.7%, all exceeding Australia's 38.4%.

Table 12: Religious Affiliation

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No	%	No	%	No	%	%	%
No Religion, so described	208,009	43.7	157,888	46.1	27,146	48.2	40.7	38.4
Catholic	82,376	17.3	54,087	15.8	8,476	15.1	18.6	20.0
Anglican	55,201	11.6	41,405	12.1	7,636	13.6	11.3	9.8
Not stated	29,552	6.2	22,955	6.7	4,487	8.0	7.6	6.9
Uniting Church	17,257	3.6	12,751	3.7	1,718	3.1	3.6	2.6

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note: 'No Religion, so described' does not include those who reported Secular and Other Spiritual Beliefs such as Atheism, Agnosticism and Own Spiritual Beliefs.

Traditional Christian denominations show lower representation than national figures, particularly Catholicism, whilst Anglican affiliation remains stronger than the national average. This pattern suggests these coastal communities are at the forefront of Australia's continuing shift towards secular identification, whilst maintaining vestiges of traditional Protestant heritage.

Language Used at Home

Table 13 shows Census data relating to language used at home. It reveals linguistic patterns across the RDAMBSC that markedly differ from state and national trends. These communities demonstrate a particularly strong dominance of English-only households, with proportions ranging from 86.7% in Moreton Bay to 88.8% on the Sunshine Coast, significantly exceeding both Queensland (80.5%) and national (72%) averages.

The presence of households using non-English languages shows a distinct gradient, decreasing from Moreton Bay (10.7%) through to Noosa (7.9%), all notably lower than the national average of 24.8%. This pattern suggests these regions maintain a more linguistically homogeneous character compared to broader Australian demographics.

Specific language communities show interesting regional concentrations, with Punjabi and Mandarin more prominent in Moreton Bay, whilst European languages like German, Portuguese and French demonstrate stronger representation in Noosa. This distribution reflects distinct migration patterns and settlement preferences across these coastal communities, whilst maintaining a predominantly English-speaking environment that sets them apart from national linguistic diversity patterns

Table 13: Languages Used at Home

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No	%	No	%	No	%	%	%
Punjabi	2,748	0.6			n.r		0.6	0.9
Mandarin	2,534	0.5	1,107	0.3			1.6	2.7
Samoan	2,315	0.5	n.r		n.r		0.3	0.2
Tagalog	2,105	0.4	n.r		n.r		0.4	0.5
Afrikaans	2,087	0.4	1,097	0.3	n.r		0.3	0.2
German	n.r		1,537	0.4	411	0.7	0.3	0.3
Spanish	n.r		1,173	0.3	300	0.5	0.6	0.7
Portuguese	n.r		1,057	0.3	311	0.6	0.3	0.3
French	n.r		n.r		320	0.6	0.2	0.3
Italian	n.r		n.r		234	0.4	0.3	0.9
English only used at home	412,761	86.7	304,081	88.8	49,844	88.5	80.5	72.0
Households where a non-English language is used	18,306	10.7	10,540	8.2	1,721	7.9	15.6	24.8

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

n.r. = not reported

3.3 Economic Profile

RDAMBSC's economic profile, prepared by economy.id estimates that the region's Gross Regional Product (GRP) was $54.29 billion in 2023-24, which represented 10.44% of the state's Gross State Product (GSP). This percentage has steadily grown since 2001 (8.72%), signalling a growing contribution of RDAMBSC towards Queensland's Gross Regional Product. The estimated contribution of each industry sector and a comparison with Queensland, is shown in Figure 5.

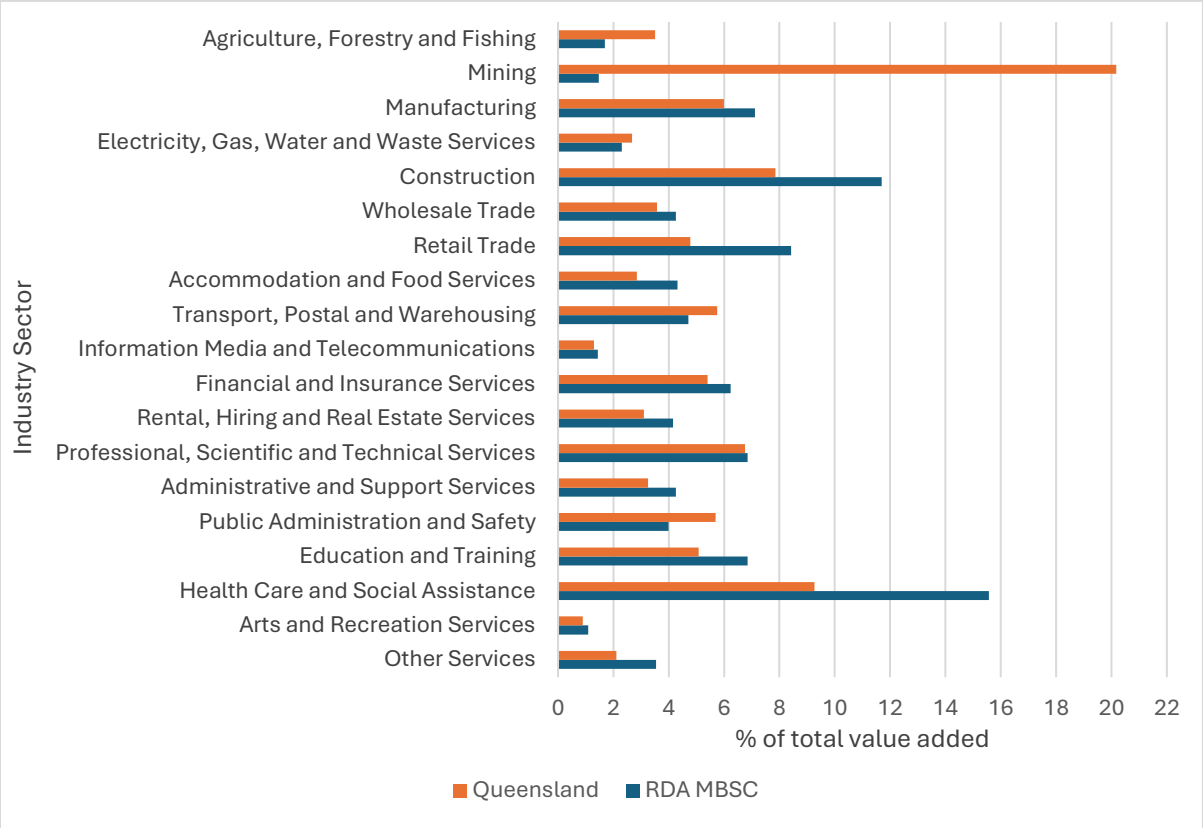
Data for each industry sector is provided in Table 14, which shows that the Healthcare and Social Assistance, Construction and Retail Trade industries predominate, making up 35.7% of the industry value-added for the RDAMBSC. These three industries also showed significantly larger percentages of value added compared to Queensland. Conversely, Mining showed a significantly smaller percentage of value added within RDAMBSC compared to Queensland.

Education and training, professional, scientific and technical services, financial and insurance services, retail trade, construction and manufacturing all contribute over 6% to industry value-added. These proportions vary considerably across the RDA, with Accommodation and Food Services (covering tourism services) particularly strong in Noosa.

Construction was the only industry sector that has experienced a decline in value added across RDA MBSC, noting $17 million less in 2023/24 compared to 2018/19. While the Sunshine Coast Council area recorded an increase of $91.2 million of Construction sector value since 2018/19, Moreton Bay and Noosa Shire council areas recorded decline in value added from the construction industry over that same period (-$88m and -$20m respectively). Noosa has also recorded decline in value added from Manufacturing, Wholesale Trade and Education and Training industry sectors, contrasting the overall growth recorded since 2018/19 for the overall RDA MBSC and the other two council areas. This highlights some diversity in industry growth trends across the different council areas of RDA MBSC.

The largest changes in the value added by industries between 2018/19 and 2023/24 in the RDAMBSC were for Health Care and Social Assistance (+$2,068 million), Retail Trade (+$769 million), Professional, Scientific and Technical Services (+$710 million) and Other Services (+$485 million).

Figure 5: Value Added by Industry (2023-24)



Source: National Institute of Economic and Industry Research (NIEIR) ©2024

Table 14: Value Added by Industry Sector (2023-24)

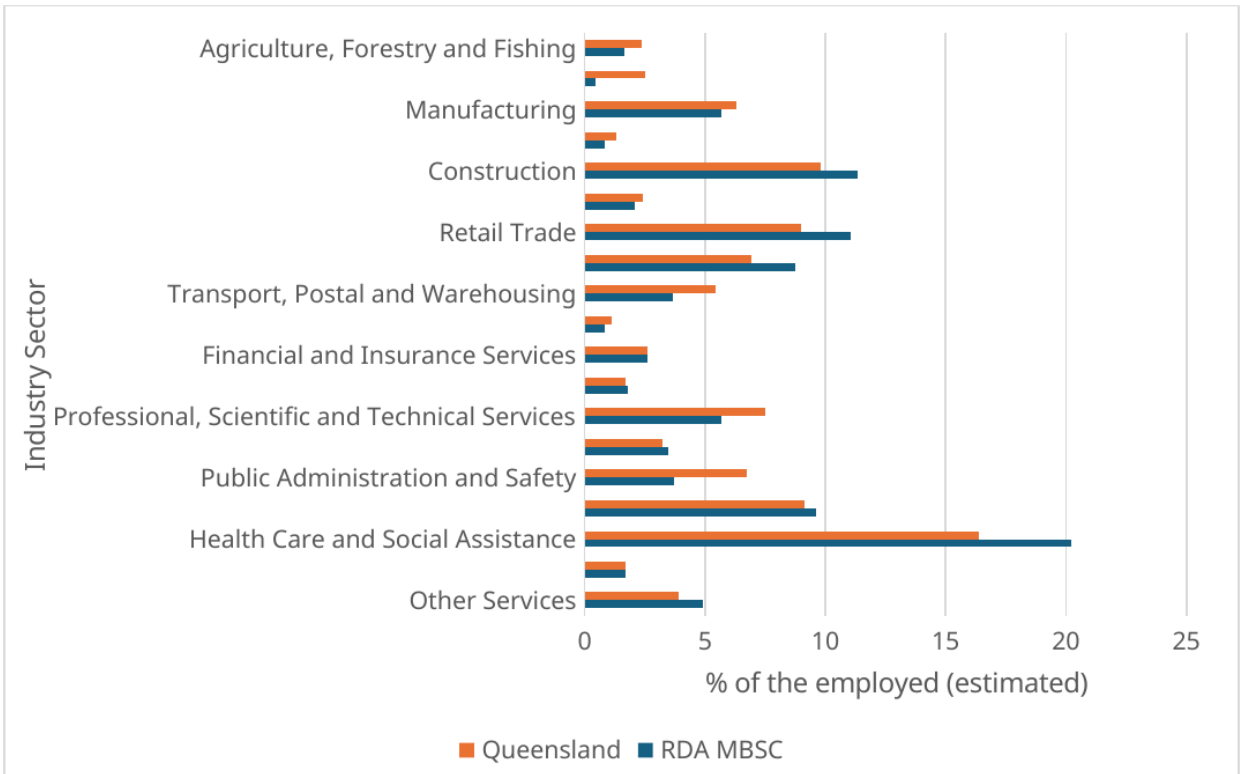
	Moreton Bay		Noosa		Sunshine Coast		Totals	
	$m	%	$m	%	$m	%	$m	%
Agriculture, Forestry and Fishing	328.2	1.8	26	0.9	355.5	1.7	709.7	1.7
Mining	136.1	0.7	25.9	0.9	458	2.2	620.1	1.5
Manufacturing	1,552.30	8.5	114.4	3.9	1,320.50	6.3	2,987.20	7.1
Electricity, Gas, Water and Waste Services	476.2	2.6	56.3	1.9	433.9	2.1	966.4	2.3
Construction	2,230.10	12.2	304.5	10.4	2,375.40	11.4	4,910.00	11.7
Wholesale Trade	991.9	5.4	97.3	3.3	701.4	3.4	1,790.60	4.3
Retail Trade	1,699.20	9.3	295.2	10.1	1,542.80	7.4	3,537.20	8.4
Accommodation and Food Services	718.9	3.9	221.1	7.6	872.6	4.2	1,812.60	4.3
Transport, Postal and Warehousing	861.1	4.7	106	3.6	1,012.70	4.9	1,979.80	4.7
Information Media and Telecommunications	227.9	1.2	37.6	1.3	340	1.6	605.4	1.4
Financial and Insurance Services	796	4.4	220.5	7.6	1,601.10	7.7	2,617.70	6.2
Rental, Hiring and Real Estate Services	643.7	3.5	166.6	5.7	936.7	4.5	1,747.00	4.2
Professional, Scientific and Technical Services	1,099.40	6	265.5	9.1	1,510.60	7.3	2,875.50	6.8

	Moreton Bay		Noosa		Sunshine Coast		Totals	
	$m	%	$m	%	$m	%	$m	%
Administrative and Support Services	680.6	3.7	199.8	6.9	910.2	4.4	1,790.60	4.3
Public Administration and Safety	811.5	4.4	109.3	3.7	757.6	3.6	1,678.50	4
Education and Training	1,329.00	7.3	145.4	5	1,401.10	6.7	2,875.40	6.8
Health Care and Social Assistance	2,851.30	15.6	369.1	12.7	3,318.80	15.9	6,539.20	15.6
Arts and Recreation Services	153.5	0.8	40.5	1.4	264.7	1.3	458.7	1.1
Other Services	665.8	3.6	114.1	3.9	707.4	3.4	1,487.30	3.5
Total industries	18,252.80	100	2,915.10	100	20,821.10	100	41,988.90	100

Source: economy.id Regional Economic Profile for RDAMBSC using NIEIR regional estimates, value-added by industry, 2023-24. Accessed April 2026.

The distribution of employment by industry is shown for RDA MBSC in Figure 6. Again, the data show the significance of Health Care and Social Assistance, Construction and Retail Trade. Employment in Accommodation and Food Services and Education is also significant.

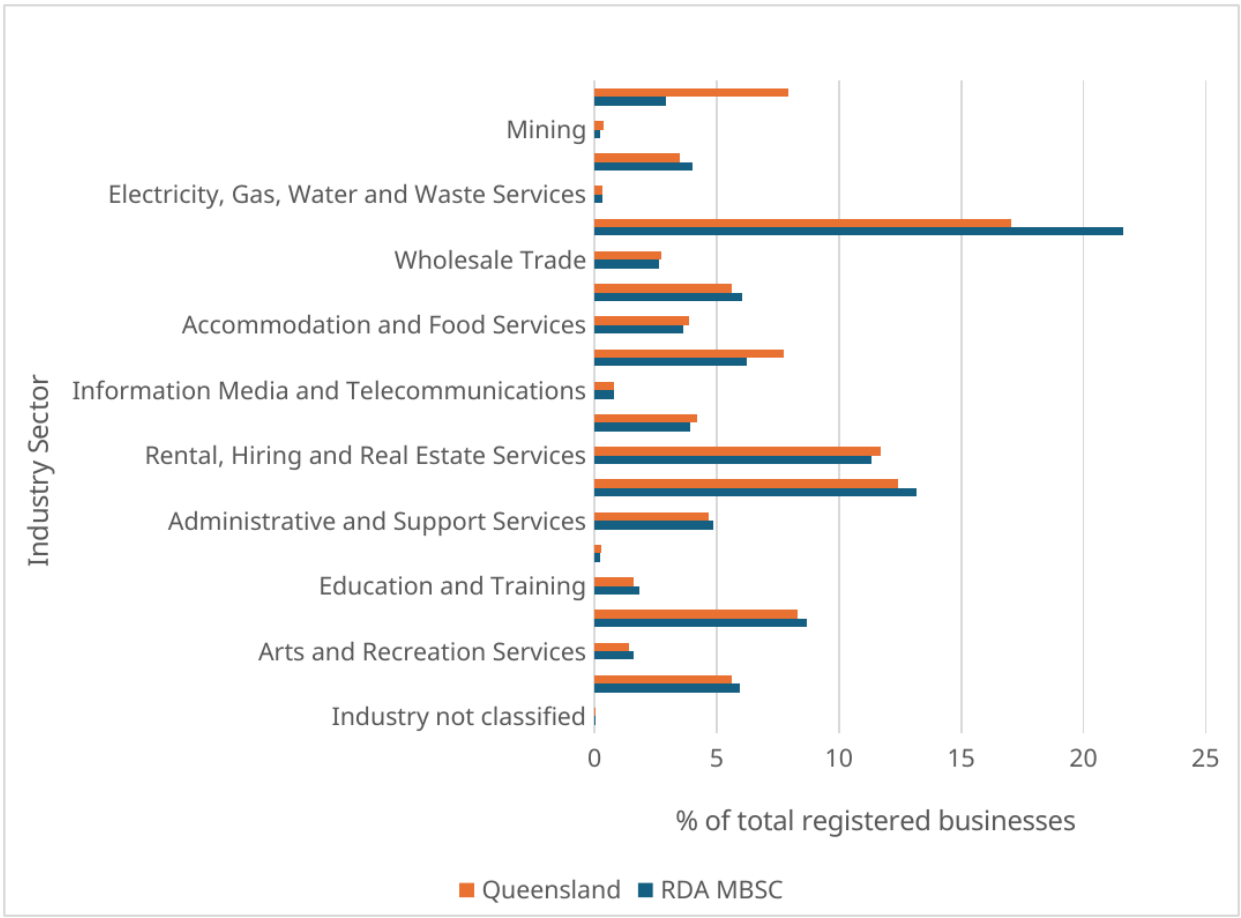
Figure 6: Employment by Industry (2023-24)



Source: economy.id Regional Economic Profile for RDAMBSC using NIEIR regional estimates, employment by industry, 2023-24. Accessed April 2026.

Information relating to registered businesses shows the predominance of businesses in the Construction industry. The Construction industry had the largest number of total registered businesses in RDAMBSC, comprising 21.63% of all total registered businesses, compared to 17.04% in Queensland. Comparative data is shown in Figure 7.

Figure 7: Registered Business by Industry (2025)



Source: Australian Bureau of Statistics (ABS), Counts of Australian Businesses, including Entries and Exits, 2021 to 2025.

The large number of businesses in the construction industry will include large and small construction firms, building industry trades businesses (plumbers, electricians, etc) and contractors who work through their contracting company.

3.4 Income and Work

The Census collects a very large amount of information on income participation in the labour market. Data for the RDAMBSC Region across a number of categories is provided below.

Labour force participation and employment status

In Table 15 ABS 2021 Census is compiled to provide a profile of the labour across the RDAMBSC region. It shows comparatively lower participation rates in Sunshine Coast and Noosa compared to Queensland and the rest of Australia. Similarly, the proportion who worked full time is lower in these two LGAs, while the proportion working part-time is higher. Unemployment rates are also lower in Sunshine Coast and Noosa.

Table 15 provides the 2021 Census labour-force baseline for the region. For current labour-market conditions in 2026, the preferred current-series source is Jobs and Skills Australia's Small Area Labour Markets release for the December quarter 2025. Figure 8 is retained as historical context.

Table 15: Labour Force Participation

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No.	%	No.	%	No.	%	%	%
In the labour force	232,404	60.9	167,712	59.3	25,391	53.0	61.6	61.1
Worked full time	128,323	55.2	83,981	50.1	11,338	44.7	55.8	55.9
Worked part time	69,936	30.1	59,388	35.4	10,030	39.5	30.5	31.2
Away from work (a)	21,072	9.1	16,917	10.1	2,883	11.4	8.3	7.8
Unemployed	13,073	5.6	7,424	4.4	1,137	4.5	5.4	5.1

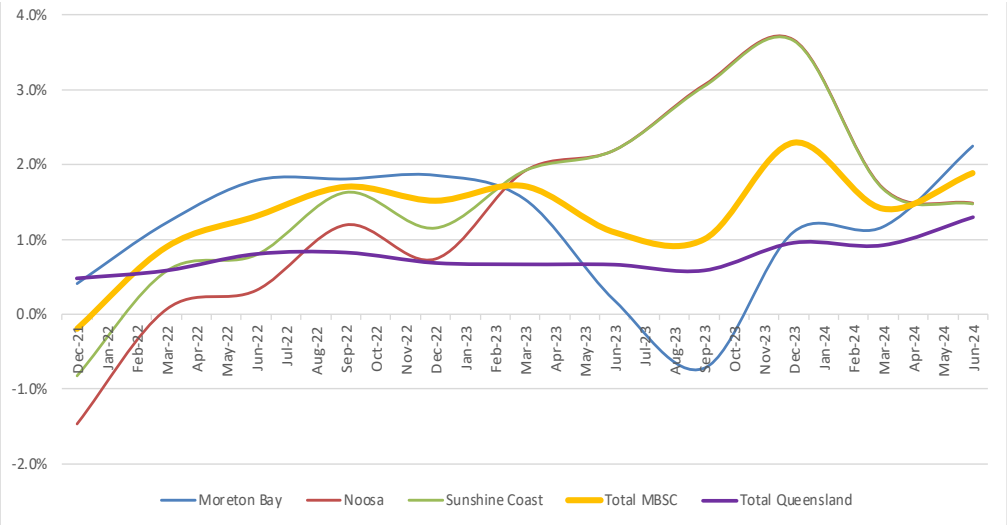
(a) Counts employed people who reported 0 hours of work the week before the Census, or did not state their hours of work

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note 1: Calculated percentages represent a proportion of people aged 15 and over who reported being in the labour force in the area.

Note 2: The ABS Labour Force Survey provides the official estimates of Australia's labour force. More information is provided in Comparing 2021 Census and Labour Force Survey.

Figure 8: Quarterly Change in Employment (2021-24: Historical Context)



Source: Jobs and Skills Australia, Small Area Labour Markets, December quarter 2025 release.

Occupation

Information drawn from the 2021 Census on Occupations for people employed, is provided in Table 16. The data reveals distinctive workforce patterns that distinguish the region from national averages. It points to a diversified, resilient labour market with specific regional advantages in technical and managerial capabilities.

Professional employment shows a clear coastal gradient, rising from 17.9% in Moreton Bay to 22.2% in Noosa, though remaining below the national average of 24%. The region demonstrates particular strength in technical and trade occupations, consistently exceeding state and national benchmarks.

Higher proportions of managerial and administrative roles point to a robust small business sector, while lower proportions of labourers indicate a transition toward higher-skilled employment.

Table 16: Occupation

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No.	%	No.	%	No.	%	%	%
Professionals	39,202	17.9	33,789	21.1	5,008	20.7	21.4	24.0
Technicians and Trade Workers	32,335	14.7	24,290	15.2	3,582	14.8	13.7	12.9
Clerical and Administrative Workers	30,987	14.1	19,410	12.1	2,539	10.5	12.7	12.7
Managers	25,034	11.4	19,747	12.3	3,697	15.2	12.5	13.7
Labourers	22,976	10.5	15,619	9.7	2,398	9.9	10.1	9.0
Sales Workers	19,947	9.1	15,288	9.5	2,438	10.1	8.7	8.2
Machinery Operators and Drivers	15,630	7.1	7,863	4.9	936	3.9	6.8	6.3
Community and Personal Services Workers	29,224	13.3	21,525	13.4	3,162	13.0	12.3	11.5

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note: Covers Employed people aged 15 years and over

Industry of Employment

Table 17 provides details of industry of employment according to the top responses reported for the RDAMBSC LGAs in the 2021 Census. These industry employment patterns across the Region reveal distinctive economic specialisations reflecting local character and market demands.

The data reveals that:

- Healthcare emerges as a significant employer, particularly on the Sunshine Coast where hospital employment reaches 5.5%, surpassing national averages.
- Tourism and hospitality show notable concentrations in Noosa, with cafes, restaurants and accommodation services understood to be employing a substantial workforce segment.
- The retail sector maintains consistent employment levels regionwide, while aged care and social assistance services demonstrate representation above national benchmarks.

These patterns suggest a diversified service economy balancing healthcare infrastructure, tourism amenities and essential retail services across the region.

Table 17: Top Industries of Employment

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No.	%	No.	%	No.	%	%	%
Hospitals (except Psychiatric Hospitals)	10,189	4.6	8,750	5.5	677	2.8	5.0	4.5
Supermarkets and Grocery Stores	6,165	2.8	4,133	2.6	589	2.4	2.5	2.5
Aged Care Residential Services	6,044	2.8	5,060	3.2	576	2.4	2.2	2.1
Cafes and Restaurants	-	-	4,768	3.0	1,161	4.8	2.3	2.2
Takeaway Food Services	6,037	2.8	-	-	-	-	2.3	1.9
Accommodation	-	-	-	-	791	3.3	1.2	0.9
Other Social Assistance Services	5,968	2.7	4,363	2.7	-	-	2.4	2.3

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Australian Defence Force Service

As shown in Table 18, the 2021 Census highlighted some distinctive defence service patterns across the RDAMBSC.

The data reveals that Moreton Bay emerges as a significant defence community hub, with 0.6% currently serving and 4.3% being veterans - markedly higher than neighbouring regions and national averages.

Sunshine Coast and Noosa demonstrate strong appeal for veterans, with previous service rates of 3.8% and 3.1% respectively, well above the national figure of 2.4%.

This concentration of defence-connected residents, particularly pronounced in Moreton Bay where nearly 5% of the population has served, may suggest specific requirements for targeted support services and community infrastructure development across these regions.

There may be opportunities to encourage previously served veterans with technical knowledge and skills and leadership capabilities to establish entrepreneurial businesses.

Table 18: Australian Defence Force Service Table 18: Australian Defence Force Service

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No.	%	No.	%	No.	%	%	%
Currently serving	2,208	0.6	497	0.2	38	0.1	0.6	0.4
Previously served (and not currently serving)	16,469	4.3	10,818	3.8	1,220	3.1	3.3	2.4
Has never served	343,052	89.8	255,951	90.4	34,444	91.0	89.4	91.2
Not stated	20,158	5.3	15,785	5.6	2,240	5.8	6.7	6.0

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note: Australian Defence Force Service includes service in the Regular and/or Reserves service. Includes Royal Australian Navy, Australian Army, Royal Australian Air Force, Second Australian Imperial Force, National Service and NORFORCE. Excludes service for non-Australian defence forces.

Employment Status of Couple Families

The 2021 census reported the employment status of couple families, reflecting growing interest in this changing social pattern. Data is provided in

Table 19, offering potential insights for regional economic strategy development.

The data reveals that:

- Moreton Bay has higher dual full-time employment (21.5%) compared to Sunshine Coast (17.2%) and Noosa (12.8%), suggesting stronger traditional workforce participation. This pattern aligns more closely with state (22.9%) and national (22.2%) averages.
- Noosa has a higher rate of dual part-time employment (7.4%) combined with higher rates of mixed employment arrangements, suggesting a more flexible labour market tied to the region's tourism-dependent economy.
- There was a substantial proportion of couples where both partners are not working, ranging from 32.1% in Noosa to 25.6% on the Sunshine Coast. While this may be influenced by age group differences in resident populations (e.g. more residents of Noosa being beyond working ages), these rates exceed both state (20.5%) and national (21.0%) averages, suggesting potential areas for targeted employment support and skills development initiatives.

Table 19: Employment Status of Couple Families

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No.	%	No.	%	No.	%	%	%
Both employed, worked full-time	23,051	21.5	13,730	17.2	1,758	12.8	22.9	22.2
Both employed, worked part-time	4,331	4.0	4,661	5.8	1.103	7.4	4.5	4.8
One employed full-time, one part-time	21,428	20.0	16,572	20.8	2,341	17.0	20.5	20.8
One employed full-time, other not working	13,611	12.7	7,698	9.7	1,188	8.8	12.0	12.5
One employed part-time, other not working	5,670	5.3	4,950	6.2	1,068	7.8	5.7	6.1
Both not working	24,105	22.5	20,407	25.6	4,426	32.1	20.5	21.0
Other	9,922	9.3	7,417	9.3	1,225	8.9	8.4	8.1
Labour force status not stated	4,985	4.7	4,341	5.4	753	5.5	5.4	4.6

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note: The ABS Labour Force Survey provides the official estimates of Australia's labour force. More information is provided in Comparing 2021 Census and Labour Force Survey.

Median Weekly Incomes

Analysis of 2021 Census income data reveals distinct economic patterns across the RDAMBSC.

As shown in Table 20, all RDAMBSC LGAs fall below state and national income averages, while Moreton Bay has the highest median incomes, benefiting from its proximity to Brisbane's employment market.

Income levels reveal something of the region’s economic development challenges, particularly in generating high-value employment opportunities comparable to metropolitan areas, despite their attractive lifestyle benefits.

Table 20: Median Weekly Incomes

	Moreton Bay	Sunshine Coast	Noosa	Queensland	Australia
	$	$	$	$	$
Personal (b)	761	755	722	787	805
Family (c)	1,957	1,920	1,800	2,024	2,120
Household (d)	1,648	1,595	1,467	1,675	1,746

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

(a) Incomes are collected in ranges. The medians are then calculated using information from the Survey of Income and Housing.

(b) Excludes people aged 15 years and over who did not state their income.

(c) Excludes families where at least one family member aged 15 years and over did not state their income.

(d) Excludes households where at least one household member aged 15 years and over did not state their income.

Method of Travel to Work

Census information on how people travel to work is provided in Table 21. Transport patterns across the Moreton Bay–Sunshine Coast–Noosa region reveal important implications for regional connectivity, labour mobility and infrastructure planning.

Table 21: Method of Travel to Work (Selected Key Indicators: 2021 Census)

Indicator	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No.	%	No.	%	No.	%	%	%
Car, as driver	132,670	60.5	100,330	62.6	13,850	57.1	59.5%	52.7%
Worked at home	31,537	14.4	23,356	14.6	4,633	19.1	14.1%	21.0
Did not go to work	25,552	11.6	19,112	11.9	2,853	11.8	11.1%	11.8%
People who travelled by public transport	9,254	4.2	2,087	1.3	282	1.2	4.1%	4.6%
People who travelled by car as driver or passenger	145,853	66.5	107,865	67.3	14,975	61.8	65.4%	57.8%

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Method of travel to work (MTWP), Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Notable features of the data are:

- High private vehicle dependency, exceeding national averages, particularly in Moreton Bay and Sunshine Coast
- Public transport infrastructure gap exists, with minimal usage in Sunshine Coast and Noosa compared to Moreton Bay,
- Noosa has higher proportion of home-based work (19.1%).

Registered Motor Vehicles

Census information on motor vehicle registrations is provided in Table 22. The data reflects distinctive patterns which may warrant careful policy consideration.

Table 22: Registered Motor Vehicles Table 22: Registered motor vehicles (2021)

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No.	%	No.	%	No.	%	%	%
None	7,738	4.5	4,972	3.9	769	3.5	5.7	7.3
1 motor vehicle	57,622	33.7	44,461	34.8	7,554	34.6	35.2	36.2
2 motor vehicles	65,673	38.4	50,224	39.3	8,584	39.3	37.5	36.3
3 or more motor vehicles	37,880	22.1	26,578	20.8	4,627	21.2	20.0	18.8
Number not stated	2,110	1.2	1,691	1.3	316	1.4	1.5	1.5

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, place of usual residence basis, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note: Motor vehicles excludes motorbikes, motor scooters and heavy motor vehicles. Relates to Occupied private dwellings (excl. visitor only and other non-classifiable households)

The data reveals:

- Moreton Bay and Sunshine Coast have significantly higher rates of multiple vehicle ownership compared to state and national averages, with approximately 60% of households maintaining two or more vehicles.
- Both of these LGAs also show notably lower proportions of zero-vehicle households, suggesting potential public transport and other accessibility challenges.

3.5 Health

Census data concerning long term health conditions is provided in Table 23. The data reveals distinctive patterns in long-term health conditions across the RDA.

The data reveals:

- Mental health as a significant issue, with Moreton Bay recording notably higher rates (11.6%) compared to state and national averages. Similarly, arthritis presents consistently high prevalence across all LGAs, exceeding both Queensland and Australian benchmarks.
- Notable geographical variations emerge in diabetes prevalence, with Moreton Bay (5.2%) recording significantly higher rates than its coastal neighbours. Intriguingly, all three regions show lower rates of disease-free status compared to the national average of 60.2%.
- Cancer and heart disease patterns suggest a coastal gradient, with prevalence increasing northward through to Noosa.

Table 23: Long-term Health Conditions

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No	%	No	%	No	%	%	%
Arthritis	48,970	10.3	35,837	10.5	5,992	10.6	8.8	8.5
Asthma	46,993	9.9	27,898	8.1	4,114	7.3	8.5	8.1
Cancer (including remission)	16,527	3.5	12,868	3.8	2,465	4.4	3.1	2.9
Dementia (including Alzheimer's)	3,654	0.8	3,171	0.9	502	0.9	0.7	0.7
Diabetes (excluding gestational diabetes)	24,896	5.2	12,595	3.7	1,872	3.3	4.5	4.7
Heart disease (including heart attack or angina)	23,051	4.8	15,960	4.7	2,884	5.1	4.2	3.9
Kidney disease	5,299	1.1	2,943	0.9	458	0.8	0.9	0.9
Lung condition (including COPD or emphysema)	12,247	2.6	7,561	2.2	1,383	2.5	2.1	1.7
Mental health condition (including depression or anxiety)	55,460	11.6	32,217	9.4	4,487	8.0	9.6	8.8
Stroke	4,965	1.0	3,917	1.1	690	1.2	1.0	0.9
Any other long-term health condition(s)	47,120	9.9	29,750	8.7	4,689	8.3	8.4	8.0
No long-term health condition(s)	262,106	55.0	196,944	57.5	32,341	57.4	58.2	60.2
Not stated	36,396	7.6	28,127	8.2	4,928	8.8	8.9	8.1

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note 1: Respondents had the option of reporting multiple long-term health conditions. Therefore, the sum of all long-term health condition responses for an area will not equal the total number of people in the area. Note 2: Calculated percentages represent a proportion of the number of people in the area (including those who did not answer the long-term health conditions question).

3.6 Housing

Below is a selection of statistics drawn from the Census that are relevant to consideration of housing issues.

Housing Patterns

The Census data captured in Table 24 reveals distinctive housing patterns across the RDAMBSC region, which may suggest potential implications for regional development policy.

Table 24: Dwelling Types

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No.	%	No.	%	No.	%	%	%
Occupied private dwellings	171,018	94.4	127,927	90.7	21,847	82.0	90.7	89.9
Unoccupied private dwellings	10,222	5.6	13,126	9.3	4,810	18.0	9.3	10.1
Separate house	138,771	81.1	93,500	73.1	17,361	79.5	74.8	72.3
Semidetached, row, terrace townhouse	22,779	13.3	16,635	13.0	2,615	12.0	11.7	12.6
Flat or apartment	7,974	4.7	16,371	12.8	1,696	7.8	12.5	14.2
Other dwelling	1,267	0.7	1,055	0.8	72	0.3	0.7	0.6
No bedrooms	459	0.3	616	0.5	138	0.6	0.5	0.5
1 bedroom	4,683	2.7	4,461	3.5	769	3.5	4.7	5.3
2 bedrooms	18,399	10.8	22,411	17.5	3,865	17.7	17.0	19.1
3 bedrooms	65,675	38.4	48,072	37.6	8,709	39.9	37.5	39.0
4 or more bedrooms	79,638	46.6	50,682	39.6	8,066	36.9	38.8	34.8
Number of bedrooms not stated	2,156	1.3	1,689	1.3	305	1.4	1.6	1.4
Average number people per household	2.6		2.5		2.4		2.5 (No.)	2.5 (No.)

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, place of usual residence basis, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note: Dwelling structures and numbers of bedrooms relate only to occupied private dwellings (excl. visitor only and other non-classifiable households)

The housing patterns reveal:

- Moreton Bay has notably high occupancy rates at 94.4%, significantly exceeding both state and national averages.
- Noosa's 18% unoccupied dwelling rate suggests a substantial holiday home market and seasonal population fluctuations, presenting unique challenges for service delivery and community planning.
- The dominance of separate houses across all three LGAs, particularly in Moreton Bay (81.1%), reflects a traditional Australian suburban development pattern. However, the

Sunshine Coast's higher proportion of flats and apartments (12.8%) indicates emerging urban consolidation trends, aligning more closely with state averages and suggesting greater housing diversity.

- Moreton Bay's high proportion of four-plus bedroom dwellings (46.6%) contrasts markedly with Noosa's 36.9%, despite Noosa's lower average household size. This disparity suggests potential inefficiencies in housing stock utilisation and opportunities for more targeted development approaches.

Household Composition and Tenure

Census information on household composition and tenure is provided in Table 25. The data reveals distinctive housing patterns across the RDAMBSC offering insights into regional development trajectories and social composition.

Table 25: Housing Composition and Tenure

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No.	%	No.	%	No.	%	%	%
Family Households	128,356	75.1	92,845	72.6	15,722	72.0	71.0	70.5
Single (or lone) person households	37,657	22.0	30,061	23.5	5,328	24.4	24.7	25.6
Group households	5,008	2.9	5,021	3.9	799	3.7	4.3	3.9
Owned outright	47,910	28.0	43,429	33.9	9,555	43.7	29.1	31.0
Owned with a mortgage (a)	64,798	37.9	44,168	34.5	6,804	31.1	34.4	35.0
Rented (b)	53,240	31.1	34,900	27.3	4,556	20.9	33.1	30.6
Other tenure type (c)	2,869	1.7	3,673	2.9	590	2.7	1.9	2.0
Tenure type not stated	2,210	1.3	1,760	1.4	346	1.6	1.6	1.5

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, place of usual residence basis, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note: Occupied private dwellings (excl. visitor only and other non-classifiable households)

(a) Includes dwellings purchased under a shared equity scheme.

(b) Excludes dwellings being occupied rent-free, this is not comparable to 2016 QuickStats data.

(c) Comprises dwellings occupied rent free, occupied under a life tenure scheme and other tenure type.

The data reveals:

- Moreton Bay has the highest proportion of family households at 75.1%, notably above state and national averages. This suggests a strong presence of established families, potentially driving demand for family-oriented services and infrastructure.
- Noosa has the highest proportion of outright ownership (43.7%), significantly exceeding the state average of 29.1%. This suggests substantial accumulated wealth in the region, potentially reflecting an older, more financially established demographic.

- Moreton Bay shows the highest proportion of mortgaged properties at 37.9%, indicating a younger demographic actively entering the property market.
- Moreton Bay's higher rental proportion (31.1%) aligns closely with the Queensland average, suggesting greater housing accessibility for younger residents and workers.
- Noosa's notably lower rental proportion (20.9%) may indicate potential challenges for workforce attraction and retention, particularly for service industry workers.

These findings suggest the need for nuanced, LGA specific, approaches to the housing aspects of regional economic development.

Household Income and Outgoings

Census information on household composition and tenure is provided in Table 26, covering household income, and rental and mortgage payments, depending on the form of ownership.

The data reveals:

- A distinctive pattern of income distribution and housing affordability across the RDAMBSC, potentially presenting distinct challenges and opportunities for regional economic development.
- A notable divergence in high-income household distribution, with Moreton Bay at 20.4% of households earning over $3,000 weekly, compared to Noosa's 19.2%. However, all three regions fall below both Queensland (21.9%) and national (24.3%) averages, suggesting potential constraints on regional economic growth and consumption capacity.
- The rental market demonstrates pronounced variations across the RDA, with median weekly rents ranging from $360 in Moreton Bay to $470 in Noosa. This gradient reflects and reinforces socio-economic patterns, with Noosa possibly experiencing the highest proportion of possible rental stress (45.5% paying more than 30% of income on rent), significantly exceeding state and national averages.
- Noosa has the highest proportion of households potentially under mortgage stress (16.7%), followed by Sunshine Coast (13.8%), both exceeding the state average. This suggests potential vulnerability to interest rate fluctuations and reduced discretionary spending capacity.

Table 26: Household Income and Outgoings

	Moreton Bay		Sunshine Coast		Noosa		Queensland	Australia
	No.	%	No.	%	No.	%	%	%
Household income								
Less than $650 total household weekly income (a)	n.a	15.8	n.a	16.7	n.a	18.8	16.4	16.5
More than $3,000 total household weekly income (a)	n.a	20.4	n.a	19.8	n.a	19.2	21.9	24.3
Weekly rent payments								
Median rent (b)	360	n.a	440	n.a	470	n.a	n.a	n.a
Renter households where rent payments are less than or equal to 30% of household income (c)	29,798	56.0	17,850	51.1	2,013	44.2	58.2	58.7
Renter households with rent payments greater than 30% of household income (c)	18,748	35.2	13,648	39.1	2,074	45.5	32.3	32.2
Unable to determine (d)	4,696	8.8	3,398	9.7	470	10.3	9.6	9.1
Mortgage monthly repayments								
Median mortgage repayments	1,777	n.a	1,915	n.a	1,900	n.a	n.a	n.a
Owner with mortgage households where mortgage repayments are less than or equal to 30% of household income (e)	50,189	77.5	32,051	72.6	4,645	68.3	75.7	74.0
Owner with mortgage households with mortgage repayments greater than 30% of household income (e)	7,240	11.2	6,076	13.8	1,136	16.7	11.9	14.5
Unable to determine (f)	7,371	11.4	6,036	13.7	1,019	15.0	12.4	11.5

Source: Australian Bureau of Statistics (ABS), 2021 Census QuickStats, place of usual residence basis, Local Government Areas: Moreton Bay (LGA35010), Sunshine Coast (LGA36720) and Noosa (LGA35740); Queensland; Australia. Accessed April 2026.

Note Occupied private dwellings (excl. visitor only and other non-classifiable households)

Percentages (%) exclude dwellings with 'Partial income stated' or 'All incomes not stated.'

Median rent calculations exclude dwellings being occupied rent-free, this is not comparable to 2016 QuickStats data.

This is not comparable with historical QuickStats, as applicable households included in this calculation have changed. For details on how Household income is derived please refer to RAID.

Unable to determine includes those households in which income and/or housing costs were not, or were only partially stated, by persons in the household.

This is not comparable with historical QuickStats, as applicable households included in this calculation have changed. For details on how Household income is derived please refer to MAID.

Unable to determine includes those households in which income and/or housing costs were not, or were only partially stated, by persons in the household.

4. Insights, Opportunities and Challenges

This section highlights key characteristics of the RDAMBSC region that create both opportunities and challenges for its economic development opportunities. It draws on the data presented in the Sections 2 and 3, issues identified through targeted consultation, plus council, RDAMBSC and other source documents.

4.1 Health Services

The RDAMBSC region faces a mix of healthcare challenges shaped by rapid demographic changes, economic disparities and distinct needs within vulnerable populations. The information below is necessarily in summary form, but this should not detract from attention to the vital importance of high utility health services in the Region.

Hospitals and Acute Care

Hospitals are the core of the RDAMBSC region's healthcare infrastructure, with major facilities like the Sunshine Coast University Hospital (SCUH) and Metro North hospitals providing critical services such as emergency, acute and specialist care.

However, high patient volumes, especially in emergency departments, reveal the need for expanded capacity. Patients from rural areas face travel challenges for tertiary services, pointing to a need for more localised specialised care to alleviate strain on central hospitals.

Mental Health Services

Mental health services are in high demand across parts of the Sunshine Coast and hinterland service catchments. Current infrastructure struggles with long wait times and limited crisis intervention options, leaving gaps in service accessibility.

Expanding community-based mental health facilities could offer more preventive and ongoing care closer to home, reducing the reliance on hospital-based mental health services.

Primary and Preventive Care

Primary care shortages in rural and hinterland areas affect access to routine healthcare and preventive services.

A reported lack of sufficient general practitioners and primary care clinics in these areas highlights the need for improved access to foundational healthcare. Mobile and pop-up clinics offer a promising solution, allowing preventive services to reach remote and underserved populations more effectively.

Specialist and Chronic Disease Care

High rates of chronic illnesses like heart disease, asthma and cancer across the RDAMBSC region necessitate expanded chronic disease management services.

Specialist care facilities for these conditions are limited, especially in rural areas, which often forces patients to travel long distances for treatment.

Additionally, establishing local cancer care facilities would ease the travel burden for those requiring frequent treatments like chemotherapy and radiotherapy.

Digital Health Infrastructure

Digital health is a growing area of focus, with telehealth proving essential for rural residents needing specialist consultations, particularly for chronic disease and mental health care.

Expanding telemedicine capabilities would enable more remote communities access to healthcare, reducing the need for travel.

Digital tools like patient portals can also empower individuals to manage their health, enhancing preventive care and reducing unnecessary hospital visits.

Transport and Accessibility

Transport remains a critical barrier to healthcare access for many rural residents. Improved public and medical transport services would provide essential support for those needing frequent visits to larger facilities.

Additionally, partnerships with ride-sharing services and community-driven transport programs can offer flexible solutions, particularly for those living in areas with limited transport options.

Health Needs Assessments

Reports from Health Services and Health Networks underscore several critical issues and have highlighted actionable recommendations:

- Increasing Demand for Healthcare: Rapid population growth is driving healthcare demand across the Sunshine Coast and Metro North, especially in areas with a high-density of ageing and low-income residents. Service expansion is essential to meet these needs effectively.
- Significant Gaps in Mental Health Services: High demand for mental health services coupled with access barriers, long wait times and inadequate early intervention options. Investment in accessible, integrated mental health care is critical.
- Chronic Disease Burden and Preventive Care: High rates of chronic conditions, including heart disease, asthma and obesity, create a need for targeted chronic disease management. Parts of the Sunshine Coast hinterland and other higher-need communities require strong, localised support.

- Rural Access Barriers: Access to healthcare in rural regions remains a significant barrier, particularly in the hinterland and remote areas. Enhanced transportation options and digital health innovations are recommended to bridge these gaps, especially for populations with limited mobility.
- Veteran-Specific Health Support: Veterans face a unique set of physical and mental health challenges that require tailored support. Younger veterans, in particular, may need access to comprehensive mental health and addiction services to mitigate risks of self-harm and substance dependency.
- Infrastructure and Service Expansion: The assessments recommend expanding primary care, mental health and developmental services to meet the needs of vulnerable populations. Investment in digital health infrastructure and transport solutions is also crucial for improving access.
- Culturally Appropriate and Preventive Care: Addressing health inequities across these regions calls for culturally sensitive approaches, particularly for Indigenous communities. Preventive healthcare, along with digital and integrated service offerings, should be prioritised to meet the diverse needs of high-risk populations.
- Continuous Monitoring and Adaptability: Regular Local Area Needs Assessments (LANA) reviews and updates are necessary to keep pace with changing population dynamics and healthcare needs. By ensuring ongoing assessment, these regions can maintain responsive and relevant service provision.

4.2 Industry and Business

Industrial Structure

Table 14 (page 22) provided a detailed profile of industry value-added in 2023-24 across the three councils that constitute the RDAMBSC based on calculations drawn from ABS Regional Population Growth, Australia (3218.0) and compiled by consultancy firm economy.id.

Insights, opportunities and challenges that can be drawn from the data and material available to the Review Team for important industries in the RDA are canvassed below.

Health Care and Social Assistance

From an industry perspective, health care and social assistance is the single largest sector in value-added, contributing over 12% in all three LGAs (Moreton Bay: 15.6%, Noosa: 12.7%, Sunshine Coast: 15.9%).

- As the largest employer for all three LGAs, the industry is essential in addressing the healthcare needs of both older residents and the increasing number of young families moving to the area.

- Facilities like the Sunshine Coast University Hospital and private healthcare providers play a central role in delivering a wide range of services, from general care to specialised treatments for chronic diseases such as diabetes and cardiovascular conditions.

Challenges

The industry faces several challenges.

- Workforce shortages, particularly in specialist fields like geriatrics, cardiology and aged care, are putting pressure on existing services.
- Attracting healthcare professionals to the regions, especially in more remote areas, remains difficult due to a lack of professional opportunities compared to metropolitan centres.
- Infrastructure and resource constraints, combined with a care demand, may strain local services if not addressed through sustained investment and recruitment incentives. Ensuring adequate funding and support for healthcare infrastructure will be vital to the sector's future growth and sustainability.

Opportunities

- Opportunities in the sector are significant, particularly with the continued population growth.
- There is potential from expanding aged care and disability services, including assisted living and in-home care.
- The region is also well-positioned to become a hub for healthcare innovation, especially in biotechnology and digital health, leveraging institutions like the Sunshine Coast Health Precinct.

Construction

Construction has the second highest value-added industry share and is a major contributor across all three LGAs (Moreton Bay: 12.2%, Noosa: 10.4%, Sunshine Coast: 11.4%).

With a booming real estate market and the need to accommodate both an ageing population and an influx of younger families, construction activity across residential, commercial and infrastructure projects has surged.

Moreton Bay is seeing rapid expansion in housing developments, driven by its relative affordability compared to the Sunshine Coast and Noosa.

Additionally, large-scale projects like the expansion of The Mill at Moreton Bay and infrastructure upgrades, such as the Bruce Highway, are key contributors to the region's construction boom.

Challenges

The construction industry faces several challenges:

- Skilled labour shortages, particularly in trades such as carpentry, plumbing and electrical work, are constraining the sector's capacity to meet rising demand.
- Supply chain disruptions and rising material costs, exacerbated by global factors, are increasing project timelines and expenses.
- Environmental concerns, particularly in eco-sensitive areas like Noosa, also present regulatory challenges, with stricter planning laws affecting project approvals.

Balancing growth with sustainable development while addressing labour and supply constraints will be critical for the sector's long-term success.

Opportunities

Opportunities abound in the construction sector, particularly in sustainable housing and infrastructure development.

- The growing demand for green buildings, energy-efficient homes and climate-resilient infrastructure offers new avenues for innovation in design and materials.
- The upcoming Brisbane 2032 Olympic and Paralympic Games also present opportunities for infrastructure upgrades, boosting regional growth in construction.

Agriculture and Food Production

Agriculture has been a longstanding pillar of the economy, particularly in the Sunshine Coast hinterland.

The area is known for producing various crops, including macadamia nuts, strawberries, pineapples, avocados and dairy products. Agriculture in both regions is increasingly shifting towards organic and sustainable farming practices, with a strong demand for locally produced and eco-friendly products.

- Macadamia Nuts: The Sunshine Coast is a significant producer of macadamia nuts and the industry is expanding due to global demand for healthy, high quality nuts. Producers are increasingly focused on value-added processing, such as nut oils and snacks for domestic and international markets.
- Strawberries and Pineapples: Moreton Bay has historically been one of Queensland's primary regions for strawberry and pineapple production. The annual strawberry season peaks from June to November and is crucial for local consumption and exports. Pineapples are another significant crop, contributing to the local economy through fresh produce and value-added products such as juices.

Challenges

- Climate Resilience: The region has challenges in adapting to climate change. More frequent droughts, changes in rainfall patterns and the increased risk of bushfires are threatening agricultural productivity. Investments in climate-resilient farming practices and water management are essential for long-term sustainability.

- Urbanisation: Extending residential areas into traditional farming land threatens the agricultural industry, particularly in Moreton Bay. There is an increasing need to balance urban growth with the protection of prime agricultural land.

Opportunities

- Value-Added Food Production: There is a growing opportunity to expand the value-added food production sector. Organic farming, niche markets like artisanal products and the potential for agri-tourism (e.g., farm stays and food festivals) present significant growth avenues.
- Export Potential: Both regions have strong potential to expand agricultural exports, particularly to Asian markets. Australia's free Trade Agreements (FTAs) with key trading partners such as China, Japan and South Korea provide favourable conditions for exporting agricultural products（Australian Trade and Investment Commission, 2022).

Manufacturing

Manufacturing makes and important contribution to the economy across the RDA, particularly in Moreton Bay (8.5%) and Sunshine Coast (6.3%).

Both LGAs are working to expand advanced manufacturing, particularly in areas such as clean technologies, aerospace and precision engineering.

The Moreton Bay Regional Industrial Park (MBRIP) is a significant investment designed to attract high-tech manufacturers and exporters. Moreton Bay’s proximity to Brisbane and significant investment in industrial parks and infrastructure make it a prime candidate for manufacturing growth.

The RDAMBSC region’s focus on advanced manufacturing aligns with Queensland’s broader strategy of positioning the state as a hub for advanced industries, particularly those tied to clean energy, aerospace and digital innovation.

Challenges

- A skills gap in engineering, technical trades and advanced manufacturing threatens the ability to fully capitalise on opportunities in this sector. More targeted education and apprenticeship programs are required to develop a local workforce to meet industry demands（Queensland Skills Commission, 2022).

Opportunities

- Proximity to Brisbane provides easy access to supply chains and export routes, making the region attractive for manufacturers looking to scale operations while avoiding the higher costs of inner-city Brisbane.
- The rise of clean technologies presents an opportunity for both Morton Bay and Sunshine Coast to position themselves as leaders in sustainable manufacturing,

especially in renewable energy production, electric vehicles and energy storage solutions.

Tourism

Tourism is a cornerstone industry for the region, with natural attractions and diverse offerings drawing millions of visitors each year.

Noosa's economy relies heavily on Accommodation and Food Services (7.6% contribution), while the Sunshine Coast and Moreton Bay have slightly lower but still significant dependencies at 4.2% and 3.9%, respectively.

Services range from luxury resorts in Noosa to family-oriented motels and self-catering stays across the region. Information on domestic visitor numbers, drawn from Tourism Research Australia, is provided in Table 27.

Table 27: Domestic Visitors 2023-24 (Numbers)

Year	Nights	Daytrips
Moreton Bay	2,402,781	2,945,856
Sunshine Coast	7,866,324	3,032,402
Noosa	3,938,612	965,634

Source: Tourism Research Australia, local government area domestic visitor estimates, 2023/24. Used as the last pre-2025 domestic visitor baseline.

Challenges

- The Sunshine Coast's growing food scene, emphasising local and organic produce, is a significant drawcard, together with nature and eco-tourism it is a major differentiator, particularly in hinterland areas like Maleny and Montville, which offer hiking, wildlife tours and wellness retreats.
- An overdependence on tourism risks vulnerability to external shocks such as pandemics and economic downturns, as demonstrated by COVID-19. Climate change also poses a significant risk, with rising sea levels and extreme weather threatening natural assets.

Opportunities

- Moreton Bay is growing as a tourism destination, thanks to coastal areas like Bribie Island and Redcliffe. Day-trippers from Brisbane, events like the Moreton Bay Food and Wine Festival and nature-based activities like dolphin and whale watching are driving the location's growth.

Other Industries

Professional, Scientific and Technical Services

This sector's economic contribution is significant across the region, particularly in Noosa (9.1%) and Sunshine Coast (7.3%), and to a slightly lesser extent also in Moreton Bay (6.0%).

- The growth in professional and technical services is likely driven by an expanding knowledge economy in these areas.
- Noosa has positioned itself as a hub for remote work and knowledge-based industries, attracting skilled professionals who can work remotely.
- The Sunshine Coast has also invested in innovation, particularly through its Sunshine Coast Innovation Centre and various smart city initiatives.

Financial and Insurance Services

Important aspects of industry development in this sector cover:

- Financial and insurance services have a larger share in Noosa (7.6%) and Sunshine Coast (7.7%) compared to Moreton Bay (4.4%).
- The higher value in Noosa and Sunshine Coast likely ties into the region's appeal to retirees requiring various financial services, from wealth management to insurance. Additionally, the relative affluence in parts of these regions may be driving demand for financial products and services.

Retail Trade

Retail trade contributes significantly to the economy in all three LGAs (Moreton Bay: 9.3%, Noosa: 10.1%, Sunshine Coast: 7.4%).

- As Moreton Bay rapidly grows, local consumption is benefiting retail trade.
- The high value added by retail in Noosa can be attributed to tourism which has a well-established tourism economy. Tourists drive demand for retail in food, beverages and leisure-related products.
- In contrast, Sunshine Coast shows a slightly lower retail contribution, perhaps due to the greater emphasis on the construction and healthcare sectors.

Wholesale Trade

Wholesale trade contributes moderately to all council areas (Moreton Bay: 5.4%, Noosa: 3.3%, Sunshine Coast: 3.4%).

- Moreton Bay's relatively strong contribution may be tied to its logistics and supply chain hub role due to its location near Brisbane, which supports the regional distribution of goods.

Rental, Hiring and Real Estate Services

This sector is more prominent in Noosa (5.7%) than in Moreton Bay (3.5%) or Sunshine Coast (4.5%).

- Noosa's higher value reflects the high demand for real estate, including luxury properties and holiday rentals, given the area's desirability as a lifestyle and tourism destination.

Administrative and Support Services

This sector makes slightly higher contributions for Noosa (6.9%) compared to Moreton Bay and Sunshine coast council areas (3.7% and 4.4% respectively).

- Administrative services often grow in support of larger industries like health care, construction and professional services, indicating a supportive role for the broader economy.

Conclusion

Across the RDAMBSC, service-based sectors (especially health care, construction and retail) dominate the economy, reflecting broader trends in Australia's shift towards a service-oriented economy.

The contributions of tourism, construction and health-related industries highlight the region's demographic and geographic characteristics. Moreover, regional differences in sectors like financial services, accommodation and real estate reflect each area's unique economic drivers.

4.3 Workforce

Drawing on the statistical profiles, documentary information and consultations, the following insights are provided.

Composition and Demographics

- At 30 June 2025, Moreton Bay's population was 532,445. Its 2021 Census labour-force baseline was 232,404 people, and the LGA is projected to grow strongly as residential development and employment opportunities continue to expand. Moreton Bay's relatively young profile, with a median age of 39, means the workforce is shaped strongly by younger families and working-age adults.
- At 30 June 2025, the Sunshine Coast's population was 381,957. Its 2021 Census labour-force baseline was 167,712 people. Growth continues to be driven by inward migration and the expansion of healthcare, education and construction. The LGA's median age of 43 is above the state average, reflecting a larger proportion of retirees and a corresponding concentration of employment demand in health and care services.
- At 30 June 2025, Noosa's population was 59,551. Its 2021 Census labour-force baseline was 25,391 people. Employment patterns are shaped strongly by tourism, hospitality and

higher-value service activities. Noosa also has the oldest demographic profile in the region, with a median age of 50, which contributes to higher levels of part-time work and stronger demand for lifestyle- and care-related services.

More recent workforce intelligence points to continued growth pressure in the broader Sunshine Coast labour market, although it is not directly comparable with the LGA-based tables above. Jobs Queensland's Sunshine Coast SA4 workforce profile—which includes Sunshine Coast and Noosa—projects an additional 14,708 jobs between 2023–24 and 2027–28, equivalent to 7.3% growth. The strongest forecast growth is in health care and social assistance, public administration and safety, professional, scientific and technical services, electricity, gas, water and waste services, and education and training. Complementing this, the Queensland Government Statistician's Office reported that the Sunshine Coast SA4 had 223,700 employed persons, a 3.2% unemployment rate and a 62.6% participation rate in December 2025.

Occupational Profile

Moreton Bay, Sunshine Coast and Noosa LGAs reflect a diverse economy heavily influenced by key sectors such as healthcare, construction, education, tourism and professional services.

This occupational structure is evolving as new industries emerge, including advanced manufacturing, digital technologies and renewable energy. Further insights are provided below.

Professional Services and Knowledge-Based Occupations

- An important and growing occupational category in the region includes professionals, managers and knowledge workers, especially in fields like law, accounting, digital services and project management.
- In many ways the emergence of the digital economy is reshaping the workforce in the Sunshine Coast and Moreton Bay regions. With the increasing role of digital technologies, there is heightened demand for software developers, cybersecurity experts and data analysts bolstered by tech-focused initiatives.

Healthcare and Social Assistance Occupations

- Healthcare is one of the largest and fastest-growing sectors across all three LGAs, particularly in the Sunshine Coast and Moreton Bay areas.
- The expansion of the Sunshine Coast Health Precinct has created thousands of jobs for doctors, nurses, aged care workers and allied health professionals. Summary Insights are provided in Table 28.

Table 28: Healthcare and Social Assistance Insights

Occupation	Region(s)	Sector/Industry	Key Characteristics	Employment Trends
Nurses and Allied Health Workers	Sunshine Coast, Noosa	Healthcare and Social Assistance	High demand due to the ageing population and expanding healthcare facilities	Significant growth, especially in aged care and digital health
Aged Care Workers	Sunshine Coast, Noosa	Aged Care Services	High demand for caregivers and home aides due to the ageing population	Rapid growth, with challenges in filling job vacancies
Medical Practitioners	Sunshine Coast, Moreton Bay	Healthcare	Growing need for doctors and specialists due to the expansion of the Sunshine Coast Health Precinct	Moderate employment growth, with high demand for specialists

Source: CLG synthesis based on ABS 2021 Census QuickStats; Jobs Queensland workforce insights for the Sunshine Coast region/SA4; Queensland Government Statistician's Office labour force data; and current council, health precinct and economic development publications.

- Nursing remains one of the top occupations, driven by the demand for healthcare services, particularly for aged care and chronic disease management. Occupations in physiotherapy, occupational therapy and dental services are also expanding as healthcare systems develop.
- As the region's population continues to age, there is a corresponding increase in employment for aged care providers, home care aides and disability support workers, particularly in Noosa and the Sunshine Coast.

Trades and Technical Occupations

- The construction and infrastructure sectors are significant employers in the RDAMBSC region, especially as large infrastructure projects, housing developments and commercial real estate continue to expand.
- Demand issues are summarised in Table 29.

Table 29: Trades and Technical Occupations Insights

Occupation	Region(s)	Sector/Industry	Key Characteristics	Employment Trends
Construction Workers	Moreton Bay, Sunshine Coast	Construction	High demand for construction roles due to infrastructure development	Steady growth driven by infrastructure projects
Civil Engineers	Moreton Bay, Sunshine Coast	Infrastructure, Civil Engineering	Increased demand for project management and technical expertise	Growing due to large projects like the Bruce Highway Upgrade
Advanced Manufacturing Technicians	Moreton Bay	Advanced Manufacturing	Specialised roles in robotics and automation systems	Growing as Industry 4.0 technologies expand

Source: CLG synthesis based on ABS 2021 Census QuickStats; Jobs Queensland workforce insights for the Sunshine Coast region/SA4; the Queensland Workforce Strategy 2022–2032; and current Queensland Government and council infrastructure and industry materials.

- Civil engineers, carpenters, electricians and plumbers are in high demand due to the region's ongoing urbanisation and major infrastructure projects like the Bruce Highway Upgrade and Beerburrum to Nambour Rail Upgrade.
- The emergence of advanced manufacturing sectors, particularly in Moreton Bay, has led to growing opportunities for machinists, automation technicians and robotics engineers. This trend is aligned with establishing Industry 4.0 hubs like The Mill at Moreton Bay.

Service and Hospitality Occupations

Tourism, hospitality and retail remain critical to the economies of Noosa and the Sunshine Coast, generating a significant portion of local employment, particularly in seasonal and part-time roles. Demand issues are summarised in Table 30.

Table 30: Service and Hospitality Occupations Insights

Occupation	LGA(s)	Sector/Industry	Key Characteristics	Employment Trends
Retail Workers	Noosa, Sunshine Coast	Retail, Tourism	Seasonal employment, largely part-time and casual	Significant fluctuations based on tourism seasons
Hospitality Workers (Baristas, Waitstaff, Hotel Staff)	Noosa, Sunshine Coast	Hospitality, Tourism	Strong demand during peak tourism seasons	Seasonal employment fluctuations, particularly in Noosa
Tour Guides and Recreational Workers	Noosa	Eco-tourism	Growing demand for guides and operators in eco-tourism activities	Moderate growth due to expanding eco-tourism initiatives

Source: CLG synthesis based on ABS 2021 Census QuickStats; Tourism Research Australia regional tourism data; and current Sunshine Coast, Noosa and Moreton Bay council tourism and economic development materials.

- Baristas, waitstaff, hotel workers and retail sales assistants make up a large portion of the workforce, especially in tourism-heavy areas like Hastings Street in Noosa and Mooloolaba on the Sunshine Coast. These jobs tend to be seasonal, with fluctuations in demand depending on tourism peaks.

- With a growing emphasis on eco-tourism and adventure tourism, new jobs are emerging for tour guides, nature conservators and outdoor recreation specialists, particularly in Noosa's national parks and conservation areas.

Education and Training Occupations

The presence of educational institutions, particularly the UniSC and TAFE Queensland, drives demand for educators, administrative staff and training coordinators and the education sector is a significant employer, supporting tertiary education and vocational training. Demand issues are included in Table 31.

Table 31: Education and Training Insights

Occupation	LGA(s)	Sector/Industry	Key Characteristics	Employment Trends
University Lecturers and Researchers	Sunshine Coast, Moreton Bay	Education and Research	Expanding roles in health sciences, biotechnology and advanced manufacturing	Growing due to the expansion of UniSC and research initiatives
Vocational Trainers and Assessors	Moreton Bay, Sunshine Coast	Education and Training	Increasing demand for trainers in construction, healthcare and IT	Steady growth in vocational education roles

Source: CLG synthesis based on ABS 2021 Census QuickStats; Jobs Queensland workforce insights for the Sunshine Coast region/SA4; and current UniSC, TAFE Queensland and council economic development materials.

- UniSC academics, researchers and administrators contribute to the region's growing knowledge economy, which is increasingly focused on biotechnology, health sciences and advanced manufacturing training.
- The growth of TAFE Queensland in the region has led to more opportunities for trainers and assessors, particularly in industries experiencing skills shortages, such as construction, healthcare and information technology.

Emerging Work Patterns and Remote Work

Remote Work and Digital Economy

- The advent of remote work has profoundly impacted work patterns, particularly following the COVID-19 pandemic.
- The International Broadband Submarine Cable strengthens the region's attractiveness to remote workers, digital firms and knowledge-intensive businesses.
- Many professionals, particularly in IT, finance and professional services, have transitioned to working from home, increasing demand for co-working spaces and localised digital infrastructure. This has been particularly evident in the migration of workers from Brisbane and Sydney to the Sunshine Coast and Noosa, where lifestyle appeal aligns with flexible work models.

- The rise of the gig economy has also created new opportunities for freelance professionals in fields such as graphic design, digital marketing and content creation.
- Noosa has become a hub for creative industries, with freelancers and small business owners taking advantage of the region's relaxed lifestyle and growing digital infrastructure.

Flexible Work Arrangements

- The tourism and retail sectors, which are highly seasonal, have long relied on flexible work arrangements such as part-time work, casual contracts and shift work.
- Flexible work patterns are increasingly common in other sectors, including education and healthcare, as more employees seek work-life balance.
- A significant proportion of the workforce in healthcare, education and retail is employed on a part-time basis, reflecting the demand for flexible work arrangements that accommodate family responsibilities and lifestyle preferences.

Workforce Challenges and Constraints

- The region faces critical skills shortages, particularly in healthcare, digital technologies and construction. The challenge is to train, attract and retain workers with the technical expertise required in these high-demand fields.
- The demand for aged care workers and nurses continues to outstrip supply, creating workforce shortages that threaten the capacity of healthcare facilities to meet the growing needs of the ageing population.
- While overall employment rates are strong, youth unemployment remains a concern, particularly in Moreton Bay.
- Young people face challenges in accessing stable employment opportunities, with many relying on casual work in retail and hospitality.

Employment Patterns Across Industry

Construction and Infrastructure

- The construction sector remains one of the largest employers in the region, particularly in RDAMBSC. It is driven by urban expansion, population growth and infrastructure projects.
- Moreton Bay has seen rapid development in residential housing, particularly in North Lakes, Caboolture and Redcliffe, creating demand for skilled labour such as builders, electricians and project managers.
- Expanding commercial precincts, such as The Mill at Moreton Bay, further contributes to construction employment.

- Ongoing infrastructure projects, including the Bruce Highway Upgrade and the Beerburrum to Nambour Rail Upgrade, are major employment drivers. These projects require a large workforce of civil engineers, labourers and transport planners.

Healthcare and Social Assistance

- Healthcare is the largest employment sector in the Sunshine Coast and is a major contributor to the Moreton Bay workforce.
- The Sunshine Coast University Hospital employs over 4,500 people and the surrounding health precincts generate significant employment in nursing, allied health and biotechnology research.
- With an ageing population, aged care services have expanded rapidly, particularly in Noosa and Sunshine Coast, which have a high proportion of retirees.
- Demand for aged care professionals and support staff is expected to continue rising, creating job opportunities but exacerbating the region's skills shortages in healthcare.
- The rise of telehealth and digital health technologies has also shifted employment patterns in healthcare, with a growing demand for IT professionals, health informatics specialists and digital health service providers.

Tourism, Hospitality and Retail

- Tourism is one of the most significant economic drivers in Noosa and the Sunshine Coast, contributing to a large portion of the region’s employment in hospitality, retail and recreational services.
- In Noosa, tourism and hospitality account for over 14% of the workforce, reflecting the region’s reliance on domestic and international visitors.
- Tourism-related jobs are highly seasonal, with a surge in demand during peak holiday periods. This has led to short-term contracts, casual work and part-time employment, which dominate the local workforce in the tourism and retail sectors.
- The COVID-19 pandemic significantly impacted the tourism sector, leading to a shift towards domestic tourism and driving job losses in hospitality. However, recent recovery efforts and increased government support have created new jobs and a renewed focus on sustainable tourism.

Education and Training

- The UniSC and its Petrie Campus in Moreton Bay play a critical role in shaping work patterns in the education and training sector.
- UniSC employs a significant number of academic and administrative staff and offers research opportunities that align with the region’s focus on biotechnology, health sciences and advanced manufacturing.

- TAFE Queensland and local vocational institutions are key to addressing the region's skills shortages. They provide apprenticeships, training programs and workplace certifications in high demand industries such as construction, healthcare and digital technologies.

Agriculture and Agribusiness

- In the more rural parts of the region, particularly in hinterland areas of the Sunshine Coast and Moreton Bay, agribusiness remains a major source of employment.
- Agriculture, particularly horticulture and dairy farming, remains a cornerstone of local employment, though mechanisation and consolidation have reduced the overall workforce in this sector.
- As the region embraces smart farming technologies and sustainable agriculture practices, new job opportunities are emerging in agtech, precision agriculture and environmental management.

4.4 Economic Opportunities

The RDAMBSC region is poised for significant economic opportunities shaped by demographic growth, industry development, infrastructure challenges and environmental factors.

While it is increasingly integrated into Queensland's broader economic fabric, and generating diversified growth prospects, but it must also respond to several existing structural and logistical hurdles.

Advanced Manufacturing and Industry 4.0

- The expansion of advanced manufacturing and Industry 4.0 technologies offers one of the region's most promising economic opportunities.
- With the integration of robotics, artificial intelligence and automated systems, local businesses are increasingly adopting new production techniques, improving productivity and positioning the region as a leader in smart manufacturing.
- Establishing precincts such as the 460 hectare The Mill at Moreton Bay has provided an important platform, attracting investment from domestic and international firms. Its proximity to the UniSC Petrie Campus ensures collaboration between industry and academia, fostering innovation and research-led growth.

Health and Biotechnology

- This sector presents significant opportunities for healthcare service delivery and research and development (R&D) in biotechnology, digital health and aged care solutions.

- The healthcare and biotechnology sectors are rapidly expanding, particularly around the Sunshine Coast Health Precinct, anchored by the Sunshine Coast University Hospital. The Precinct is expected to generate thousands of high value jobs and attract R&D investment in genomics, pharmaceuticals and telehealth solutions.
- By partnering with research institutions and private healthcare providers, the region has positioned itself as a leader in medical innovation.

Renewable Energy and Sustainability

- The shift towards renewable energy and sustainable development aligns with the global focus on green energy and environmental protection.
- The Sunshine Coast and Moreton Bay are already leaders in solar energy production and there is strong potential for further growth in wind energy, hydrogen production and energy storage.
- The Sunshine Coast Council-owned solar farm generates enough electricity to power all council-operated facilities, showcasing the potential of localised renewable energy solutions. This initiative is reducing the region's carbon footprint and positioning it as a model for sustainable development.
- Moreton Bay is exploring hydrogen energy as a future growth area. Hydrogen has the potential to play a major role in Australia's transition to a low-carbon economy and the region's proximity to Brisbane and industrial hubs makes it a strategic location for developing a hydrogen export industry.

Tourism and Eco-tourism

- Tourism will continue to be a major economic driver for the region, especially in Noosa and the Sunshine Coast.
- Both areas are recognised for their natural beauty, attracting millions of visitors each year. There is significant potential for expanding eco-tourism, wellness and cultural tourism, capitalising on the region's environmental assets and lifestyle appeal.
- The region's focus on environmental preservation and low-impact tourism creates opportunities for expanding green infrastructure, such as eco-friendly resorts and wildlife conservation programs.
- The Sunshine Coast's growing reputation for wellness tourism and health retreats offers opportunities to develop premium tourism services, particularly in health, fitness and spiritual wellness.

Climate Action

- In 2019, the Sunshine Coast Council became the first local government in Australia to achieve carbon neutrality, a significant milestone in reducing emissions across council operations. The Council aims to remain carbon neutral by maintaining renewable energy projects and adopting sustainable land use practices.

- The Sunshine Coast Council adopted a Climate Change Response Plan (2021-2026) to address climate resilience and mitigate the impacts of climate change. The plan sets out adaptation strategies to reduce the vulnerability of communities and infrastructure to extreme weather events such as floods, storms and bushfires.
- Moreton Bay Regional Council has implemented a Climate Action Plan to reduce emissions and build community resilience to climate impacts. Initiatives include tree planting programs, green infrastructure development and flood management projects to protect against rising sea levels and extreme weather.
- Moreton Bay's Resilient Rivers Initiative protects waterway health and improves floodplain management, reflecting the council's commitment to addressing climate-related flooding risks and promoting sustainable water management.
- Noosa has significantly emphasised preserving its natural environment, launching a comprehensive Climate Change Adaptation Plan to address sea level rise, extreme weather events and ecological conservation. The plan includes risk assessments for coastal communities and implementing low-carbon transport options, such as electric vehicle charging stations.
- Noosa and Sunshine Coast are recognised as containing two of the four Australian UNESCO Biosphere Reserves, reflecting the region’s commitment to balancing economic development with environmental protection. This designation supports sustainable land use, water management and biodiversity conservation, aligning with the SDGs. Noosa’s reserve was designated in 2007 and the Sunshine Coast in 2022.

In December 2022 Noosa and Sunshine Coast Councils launched the Regional Climate Action Roadmap. The roadmap outlines a way forward for the Councils’ collaborative partnership and aims to address climate change across the Sunshine Coast region. This was developed in through engagement with staff from both Councils, a community survey, and initial workshops with local leaders from the region’s key sectors.

In September 2025 Moreton Bay Council adopted Our Roadmap to Net Zero and Towards a Low Emission Future. Both documents outline Council’s plan towards net zero by 2039, introducing practical steps for achieving this goal.

4.5 The Regional Innovation Ecosystem

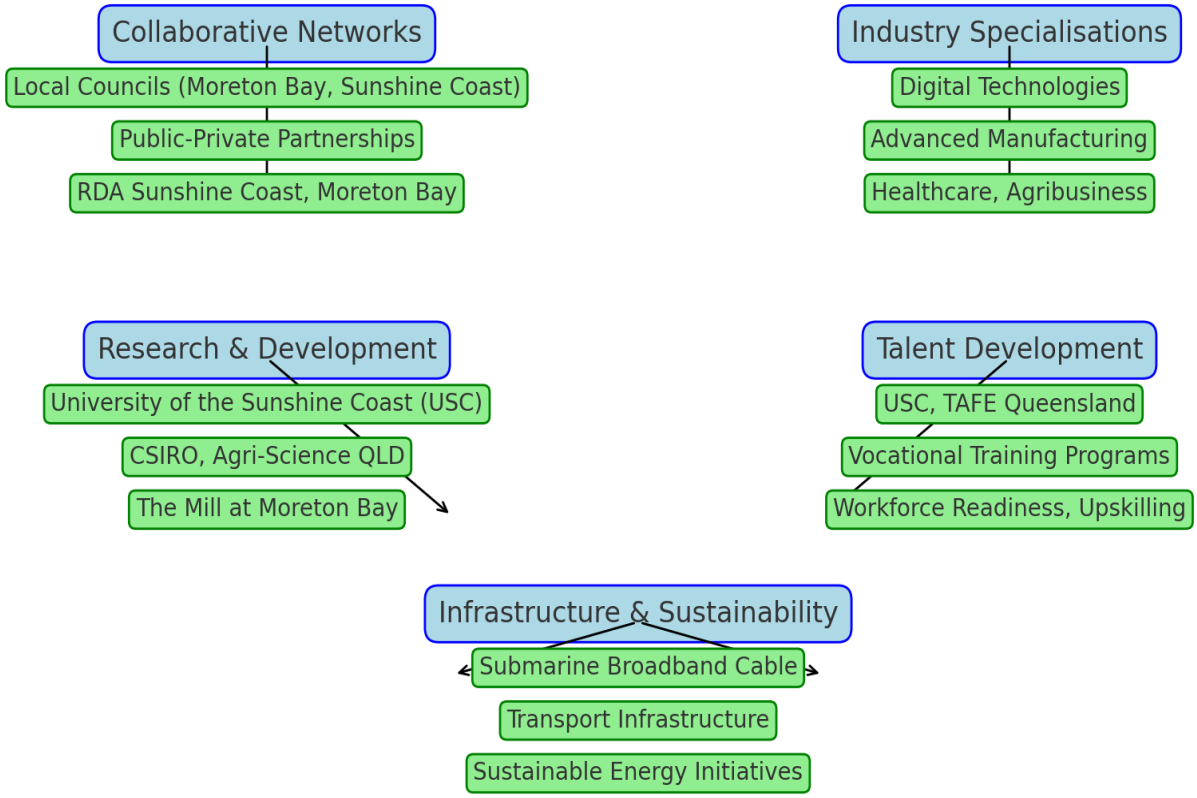
The Moreton Bay Sunshine Coast region is emerging as a dynamic and evolving innovation ecosystem underpinned by a strong foundation in collaborative networks, industry specialisations, research and development (R&D), talent development and infrastructure and sustainability.

The region is also beginning to test new frontier-sector opportunities. In 2025, RDAMBSC partnered with the Australian National University’s Institute for Infrastructure in Society, ANU InSpace and Gunggandji Project Management on the Space + Place pilot. The initiative was designed to identify economic opportunities, build social licence for regional space-industry development, strengthen the STEM workforce pipeline, and leverage existing infrastructure to support space-related activities. While still exploratory, it is relevant to the region’s ambitions in aerospace, satellite communications, advanced manufacturing and related digital industries.

The key to this transformation lies in the collaborative efforts between universities, research institutions, businesses and government agencies. A representation of the ecosystem framework is provided in

Figure 9: RDAMBSC Innovation Ecosystem.

Figure 9: RDAMBSC Innovation Ecosystem



Source: IPPG analysis.

Innovation Districts, Precincts and Hubs

Innovation Districts, Precincts and Hubs are vital elements of a vibrant innovation ecosystem. Summary information on innovation and development precincts in the RDAMBSC area is provided in Table 32.

Table 32: Innovation Districts, Precincts and Hubs

Precinct	Location	Focus	Key Activities
The Turbine Precinct	Sunshine Coast	Food and beverage manufacturing, R&D, sustainable production	Food science R&D, packaging innovation, sustainable production, export capabilities
The Mill at Moreton Bay	Petrie, Moreton Bay	Advanced manufacturing, automation, robotics, clean technologies	Research partnerships, high-tech company spaces, workforce development
NEO (National Centre for Immersive Reality)	UniSC, Sippy Downs	XR (Extended Reality), Generative AI	Collaboration between commercial entities, students and researchers
Innovation Centre Sunshine Coast	UniSC campus, Sippy Downs	Tech start-ups, biotech, digital health, ICT, sustainability	Business mentoring, commercialisation, research partnerships
Sunshine Coast Health Precinct	Kawana, Sunshine Coast	Health innovation, biotechnology, digital health	Medical research, biotech innovation, industry collaboration
Kawana Business Village	Kawana Waters, Sunshine Coast	Technology, medical, professional services	Tech companies, healthcare support, professional services
Sunshine Coast Aerospace Precinct	Sunshine Coast Airport, Marcoola	Aerospace industry, aviation technology, logistics	Aerospace research, aviation services, technological advancements
SunCentral Maroochydore	Maroochydore, Sunshine Coast	Smart city technologies, digital infrastructure, data analytics	Digital infrastructure, co-working spaces, tech startup support

Source: CLG synthesis drawing on current Moreton Bay, Sunshine Coast and Noosa council economic development material, precinct documentation and publicly available institutional sources, accessed April 2026.

Prominent Start-ups

The RDAMBSC Region is home to several prominent technology start-ups, including the ones listed in Table 33.

Table 33: Prominent Technology Start-ups

Company	LGA	Focus Area
Activate Entertainment	Noosa	Digital content creation for tourism and educational sectors, producing interactive multimedia experiences.
Atmail	Sunshine Coast	Global leader in email hosting solutions, serving corporations and ISPs worldwide.
Automio	Sunshine Coast	Digital assistant platform to automate and streamline business processes.
Biosphere Innovation	Noosa	Promotes sustainable living solutions, eco-friendly products and waste reduction initiatives in the Noosa Biosphere Reserve.
Eco Energy Innovations	Moreton Bay	Renewable energy solutions and green technology for local businesses and communities.
HeliMods	Sunshine Coast	Aerospace engineering solutions for helicopter and aircraft customisation, including medical and emergency responses.
HiveHaven	Sunshine Coast	Develops innovative beehives for sustainable agriculture and ecological support.
Huddle Insurance	Sunshine Coast	Uses AI for streamlined insurance claims processes and customer service.
ImmersaView (PLEXSYS)	Sunshine Coast	Immersive visualisation and simulation technology, now part of PLEXSYS Interface Products.
Loop Learn	Moreton Bay	AI technology for smart attendance systems in schools to improve safety and reduce administrative workload.
Lüma Lighting	Noosa	Innovative lighting designs focused on energy efficiency for commercial and residential projects.
MoboCoast	Sunshine Coast	Mobile app development for hospitality and tourism industries.
Next Level Racing	Moreton Bay	Designs and manufactures high quality racing and flight simulators for gaming enthusiasts and professionals.
Opmantek	Sunshine Coast	Network management software provider with a global presence.
Synengco	Sunshine Coast	Smart grid and energy efficiency solutions, supporting sustainability and clean energy.
Tactiv	Sunshine Coast	Grant and program management software, widely adopted by government agencies and non-profits.
Techpath	Moreton Bay	IT services for SMEs, including cloud computing, cybersecurity and data management solutions.
Travello	Sunshine Coast	Social network and booking platform for global travel experiences and communities.
Youi Insurance	Sunshine Coast	Leading insurance provider with a customer-focused approach, employing thousands in the region.

Source: CLG synthesis drawing on current council economic development material, company websites and publicly available business information, accessed April 2026.

Turbine Precinct (Sunshine Coast)

The Turbine Precinct is designed to be a collaborative innovation hub focused on scaling up food and beverage production, promoting sustainability and fostering regional economic growth. It will support small and medium-sized enterprises (SMEs) in the sector and has broader ambitions to establish the region as a national leader in advanced food manufacturing.

Key Features

It will be a shared-use space where businesses can access production lines, packaging facilities and laboratories to develop and scale up their products.

The precinct will foster collaboration between businesses, researchers and industry experts to support innovation though the development of new products and the commercialisation of sustainable food production practices.

It is expected to host innovation and research centres that allow businesses to test new technologies, sustainable practices and product designs.

Sustainability Focus

Sustainability is a core element of the Turbine Precinct's mission. The hub will focus on promoting sustainable manufacturing practices, such as reducing waste and energy use, to align with broader environmental goals.

Facilities within the precinct are designed to support circular economy principles, focusing on reducing the carbon footprint of food and beverage manufacturing.

Federal and State Government Involvement

The development Precinct is being supported by state and federal government funding as part of a larger effort to boost regional manufacturing capabilities and drive innovation in the food and beverage sector. This includes financial contributions from the Australian Government's Modern Manufacturing Initiative and Queensland State Government.

Source: https://www.turbine.org.au/

4.6 Infrastructure Development and Gaps

All LGAs in RDAMBSC region have made a major commitment to the development and maintenance of infrastructure to underpin and support economic development. These commitments, remaining gaps and further opportunities are addressed below.

Transport

Roads

- Road infrastructure faces significant strain from rapid population growth and tourist traffic. The Bruce Highway, the primary arterial road linking the region with Brisbane, is often congested, especially between Caboolture and the Sunshine Coast.
- The Bruce Highway Upgrade Program is part of a $13 billion state and federal initiative to improve traffic flow, safety and reliability. While the upgrades are underway, bottlenecks persist, especially during peak commuting times and holiday seasons.
- The Sunshine Motorway which links the coastal and hinterland areas of the Sunshine Coast, generates high tourist traffic which results in frequent congestion. Key sections around Mooloolaba and Buderim require further expansion to meet growing demand.
- Noosa's road infrastructure is under pressure, especially in tourism hubs like Hastings Street and Tewantin, where seasonal traffic peaks severely impact local mobility.
- Continued efforts are being made to upgrade local roads and expand public transportation networks to reduce congestion and support sustainable urban growth. These projects are critical for maintaining efficient transport corridors, particularly in areas experiencing rapid urban expansion.

Public and Active Transport

- Improvements to the Sunshine Coast Light Rail Project will support sustainable urban mobility and meet future population demands.
- Improvements in bus services, rail upgrades and bike lane expansions across the three LGAs will support urban mobility.
- Investment in bicycle lanes, walking paths and pedestrian bridges is critical for promoting active transport and improving connectivity in urban and rural areas, particularly in tourism-centric regions like Noosa, where outdoor activities are integral to the local lifestyle.

Rail Infrastructure

- The rail line servicing Sunshine Coast and Moreton Bay is undergoing upgrades as part of the Beerburrum to Nambour Rail Upgrade Project.

- The project aims to boost rail capacity for both freight and passenger services, helping to alleviate some of the pressure on the Bruce Highway.

The Wave

As part of the 2032 Delivery Plan for the Brisbane 2032 Olympic and Paralympic Games and beyond, The Queensland Department of Transport and Main Roads has announced The Wave, a major infrastructure project that will improve connectivity between Brisbane and Sunshine Coast airport.

With the expected increase in population and the current low public transport usage in the Sunshine Coast, The Wave will significantly improve travel with the introduction of a modern public transport system that will be accessible to all.

The wave will include three major projects: (1) a heavy passenger rail line, (2) a high-frequency, high-capacity metro-style service and (3) Mooloolah River interchange upgrade.

Once open, The Wave will be significantly faster than a car for local commuters travelling between the Sunshine Coast and Brisbane in peak periods. This will help to manage road congestion as the region grows and encourage more use of sustainable and climate friendly transport options on the Sunshine Coast.

Urban Services

Water Supply and Management

- Water infrastructure is vital across the region, particularly given the growing population and increased resource demand.
- Significant investments are being made to ensure long-term water security. This includes ongoing upgrades to reservoirs and water treatment facilities and the development of recycled water schemes to meet rising demand.
- These improvements are focusing on increasing capacity and efficiency while minimising the environmental impact on surrounding bodies of water and the ecosystem.
- Water recycling plants and potential future desalination projects could provide additional sources of fresh water, particularly during drought.
- Expanding greywater recycling systems for industrial and domestic use can also reduce water demand.

Waste Management

- The RDAMBSC councils have implemented waste diversion strategies to increase recycling rates and reduce landfill. Noosa adheres to strict waste management guidelines, emphasising zero-waste initiatives to protect its pristine natural environment.
- More advanced material recovery facilities (MRFs) are being planned to increase recycling rates and reduce environmental impacts. RDAMBSC is also exploring waste-

to-energy technologies, which convert solid waste into renewable energy. These technologies reduce landfill use while generating clean power.

Stormwater and Flood Mitigation

- The region experiences seasonal heavy rains, necessitating advanced stormwater management systems.
- The RDAMBSC councils are upgrading drainage systems, investing in flood mitigation projects and conducting regular stormwater quality management assessments to reduce flooding risks and improve water quality.
- As climate change increases the likelihood of extreme weather events, these upgrades are crucial to safeguarding urban infrastructure.

Telecommunications and the Digital Economy

- The Sunshine Coast International Broadband Submarine Cable is a key piece of telecommunications infrastructure that has significantly improved internet connectivity and speed.
- This infrastructure is vital for business operations, especially in digital sectors like ICT, cybersecurity and data services and positions the region as a leader in the digital economy.
- The region is becoming a cybersecurity, data services and telecommunications hub, making it attractive to tech start-ups, global businesses and defence industries.
- The availability of high-speed broadband also enables greater participation in the knowledge economy, with potential growth in remote work, tech innovation and digital entrepreneurship.

Renewable Energy

- The region is increasingly focusing on renewable energy to support sustainability goals. This includes investment in solar energy farms and small-scale renewable projects that aim to meet the electricity needs of urban and suburban areas.
- Sunshine Coast Council is home to Australia’s first council-owned solar farm. This 15 MW facility generates enough electricity to power the council’s infrastructure, including administration buildings, libraries and community facilities.
- This project significantly reduces the region's carbon footprint and provides a model for other local governments.
- The Council has introduced sustainability guidelines for new developments, encouraging the construction of energy-efficient buildings that reduce operational emissions. Solar panels and energy storage systems are also encouraged in residential and commercial projects.

- Moreton Bay Regional Council invests in solar energy installations on council-owned buildings and infrastructure. The goal is to reduce emissions and achieve energy self-sufficiency across public services.
- The Council is exploring partnerships with local businesses and residents to develop a community renewable energy hub, which would allow for greater energy independence and facilitate the sharing of renewable energy resources.
- Noosa has implemented a solar panel program that supports installing solar energy systems in homes and businesses. The initiative aims to significantly reduce the reliance on grid electricity while promoting battery storage to store excess solar power for future use.
- The Noosa Energy Transition Project aims to make the LGA a leader in renewable energy by focusing on solar, battery storage and electric vehicle infrastructure. The project supports the adoption of electric public transport, which aligns with Noosa's sustainable development goals.

Housing

Housing Development and Demand

Drawing on the discussion in

3.6 Housing Section on page 33 above and further research and consultation, the following Insights emerge:

- As one of the fastest-growing parts of Queensland, Moreton Bay has seen significant housing development in greenfield areas like North Lakes, Burpengary and Caboolture. These developments cater largely to first home buyers and young families, offering a mix of affordable housing options, including townhouses and low-density detached homes.
- Rising demand has pushed property prices upward and there is increasing pressure on the Council to ensure that infrastructure keeps pace with housing growth. The Sunshine Coast also faces a growing housing affordability issue as population growth outstrips supply.
- Key urban areas such as Maroochydore, Caloundra and Buderim are expanding with new residential estates, but higher demand has led to increasing property prices and rents. Sunshine Coast has also seen a rise in luxury housing and retirement living developments, particularly in coastal areas.

In 2024 Sunshine Coast Council's construction approvals recorded an all time high of $2.3 billion, over $100 more than the previous year. Some of the highest growth areas were Nirimba, Baringa and Banya, Maroochydore, Pelican Waters, Palmview and Buderim.

- Ongoing efforts are being made to balance high-density urban housing with sustainable green spaces to maintain the region's environmental appeal.
- Noosa's real estate market is characterised by high-end properties driven by demand from retirees and wealthy individuals seeking lifestyle housing. Noosa's commitment to environmental preservation has limited the scale of housing developments.
- Most new developments in Noosa focus on eco-friendly housing and low-density residential areas, stabilising population growth but increasing housing costs. This has led to affordability concerns for lower-income residents and essential workers, prompting calls for more affordable housing initiatives.

Affordable Housing Initiatives

- The local councils are working with the Queensland Government and private developers to deliver more affordable housing projects in areas such as Caboolture West, Morayfield and Marcoola.
- These projects aim to provide a mix of housing types, including social housing and affordable rental properties, to cater to low- and middle-income earners.
- The Sunshine Coast Council has prioritised affordable housing initiatives in urban growth corridors, such as Caloundra South and Palmview, where medium-density housing is promoted to cater to the rising demand from younger populations and essential workers.

Policy Implications and Strategic Directions

- The housing patterns revealed in Table 24 and Table 25 above suggest a number of policy considerations. First, the need for diversified housing stock in Moreton Bay to accommodate changing demographic needs. Second, addressing Noosa's high vacancy

rates through policies that balance tourism accommodation with permanent resident housing needs. Third, the Sunshine Coast's more diverse housing mix could serve as a model for regional centres pursuing urban consolidation.

- The average household sizes trending downward from Moreton Bay (2.6) to Noosa (2.4) suggests a need for adaptive housing policies that respond to evolving demographic profiles. This may include incentivising smaller dwelling construction and promoting innovative housing solutions that better match household sizes with dwelling configurations.

Community Services

With the rapid population increase, demand for community services such as healthcare, education, aged care and recreational facilities has risen sharply.

Healthcare and Aged Care

- The development of the Sunshine Coast University Hospital has been a major driver in expanding health services for the region.
- Additionally, private hospitals such as Ramsay Health Care's facilities have increased their capacity to cater to residential growth.
- Moreton Bay is investing heavily in healthcare infrastructure, with the planned expansion of Caboolture Hospital and the construction of new primary healthcare centres to meet the growing needs of its expanding population.
- In addition, new aged care developments in areas such as Redcliffe and North Lakes are being built to cater to the region's older residents.

Education

- The UniSC continues to expand its offerings, providing higher education opportunities for the region's growing youth population.
- New schools and educational facilities, including public and private institutions, are being developed in Birtinya, Palmview and Buderim.
- Early childhood education centres are being rapidly developed in growth corridors such as North Lakes and Caboolture.

Cultural and Recreational Services

- The RDAMBSC councils are all developing and upgrading multiple recreational parks, sports facilities and cultural facilities across the region, including the Moreton Bay Regional Sports Complex.
- Investments in national parks, walking tracks and public amenities are key priorities, alongside expanding arts and cultural facilities, such as galleries and performing arts centres.

Emergency Services and Disaster Resilience

- Given the RDAMBSC region's susceptibility to bushfires, floods and cyclones, improving emergency response infrastructure is vital. Expanding fire stations, emergency shelters and disaster management centres ensures that the regions can respond swiftly and effectively to crises(Queensland Government, 2023; Moreton Bay Regional Council, 2023).
- Investment in legacy communication systems and emergency response technology is critical to ensuring emergency services remain operational during natural disasters. Satellite communication infrastructure and emergency broadcast systems should be considered for more resilient disaster preparedness.

Green Infrastructure and Biodiversity

- Urban Greening: Investment in urban greening projects, such as creating more green corridors, urban forests and community gardens, helps mitigate the urban heat island effect and provides recreational spaces for residents. These projects also enhance biodiversity and reduce pollution(Sunshine Coast Council, 2023; Noosa Shire Council, 2023)
- Nature Reserves and Biodiversity Corridors: The expansion of protected nature reserves and the development of biodiversity corridors support the preservation of native species and ecosystems, particularly in areas like Noosa, where natural environments are critical to both the economy and community identity.

Infrastructure Constraints

Despite substantial investment in infrastructure, key transport corridors remain heavily congested. Bottlenecks affect the movement of goods and people, limiting regional economic potential.

- Bruce Highway: Although ongoing upgrades are in underway, congestion remains a significant issue, particularly during peak tourism and daily commutes.
- Public Transport: Public transport infrastructure, including rail and bus networks, remains underdeveloped relative to the region’s growth. Expanded public transport services and better integration between transport modes are urgently needed to ease pressure on road networks.

Skills Shortages

The rapid growth in sectors such as healthcare, digital industries and advanced manufacturing has led to critical skills shortages that threaten the rate of expansion, particularly in areas requiring technical expertise and highly specialised knowledge.

- Healthcare: There is a shortage of healthcare professionals, particularly in aged care, nursing and specialist medical roles. The region’s ageing population exacerbates this shortage by increasing the demand for health services.

- Technology and Digital Skills: The growth of the digital economy has created a high demand for IT professionals, cybersecurity experts and software engineers. Local educational institutions, such as UniSC, are working to address these shortages, but more vocational training and partnerships with industry are needed.

Environmental Constraints

Environmental factors present both constraints and opportunities for the region. While natural beauty drives tourism, it also necessitates strict environmental regulations that can limit development.

- Coastal regions, particularly Noosa and the Sunshine Coast are vulnerable to coastal erosion, flooding and rising sea levels. This presents significant challenges for future development and necessitates investment in climate adaptation infrastructure.
- Noosa's stringent environmental protections restrict large-scale developments, which, while preserving natural ecosystems, can also limit economic growth and housing availability.
- Balancing sustainability goals with economic development remains a significant challenge.

4.7 Lifestyle and Community

Overview

Current council reporting and strategy documents point to three recurring qualitative themes across the region: Moreton Bay's family-oriented growth profile, Sunshine Coast's strong health and lifestyle positioning, and Noosa's pronounced environmental and cultural identity. These themes help frame the social and community issues discussed below, particularly housing affordability, ageing, workforce retention and access to services.

The Australian and Queensland governments have both introduced a range of policies to address housing affordability which offer potential benefits to residents across the region. These are summarised in
Table 34.

Table 34: Housing Affordability Policies and Programs available in the RDAMBSC

Government	Policy/Program	Description
Federal	Australian Government 5% Deposit Scheme	Administered by Housing Australia. From 1 October 2025 the scheme moved to unlimited places, removed income caps and increased property price caps.
	Help to Buy	Shared-equity scheme administered by Housing Australia. Launched 5 December 2025 to support

Government	Policy/Program	Description
		eligible buyers with a smaller deposit and lower mortgage burden.
	Commonwealth Rent Assistance	Ongoing Australian Government rent assistance for eligible low-income renters.
	Housing Australia Future Fund / National Housing Infrastructure Facility	Supply-side financing and funding mechanisms administered by Housing Australia to support new social and affordable housing and enabling infrastructure.
Queensland	Securing our Housing Foundations	Queensland Government long-term housing plan, including delivery of 1 million new homes by 2044 and 53,500 social and community homes.
	Boost to Buy	Queensland low-deposit first home buyer support scheme intended to reduce the deposit gap for eligible buyers.
	Disability Housing Action Plan 2024–2027	Partnering for inclusive housing with Queenslanders with disability 2024–2027 sets out the current Queensland approach to accessible and inclusive housing options.
	Our Place: First Nations Housing and Homelessness Roadmap to 2031 / Action Plan 2024–2027	Queensland's current roadmap and action-plan framework for First Nations housing and homelessness outcomes.

Sunshine Coast and Noosa's ageing populations also impact issues such as an increased demand for:

- Aged care, seniors housing and assisted living facilities
- Health care specialists in geriatrics, endocrinology and cardiology plus general aged care workers
- Investment in health and aged care infrastructure.

Disability issues within the RDAMBSC are reflected in:

- Pressure on service accessibility due to rapid population growth and existing infrastructure gaps
- Increased demand for healthcare and support services
- Challenges in accessing disability services due to transport, geographic spread and workforce shortages

While government policies like the National Disability Insurance Scheme aim to address these gaps, service delivery in regional areas can still be problematic, particularly for people with disability and chronic illnesses who are not eligible for the NDIS.

Alignment with SDGs (Sustainable Development Goals)

Data drawn from reported actions and initiatives suggests that each LGA integrates the United Nations SDGs into their development frameworks. These include SDG 7 (Affordable and Clean Energy), SDG 11 (Sustainable Cities and Communities), SDG 13 (Climate Action) and SDG 15 (Life on Land).

The Sunshine Coast is actively working on SDG 7 by promoting clean energy through its solar farm and renewable energy initiatives. Its focus on biodiversity and conservation aligns with SDG 15, while its climate adaptation plan reflects efforts to meet SDG 13.

Moreton Bay is addressing SDG 11 by implementing strategies for sustainable urban development, including green infrastructure and public transport upgrades. The locality's resilience planning for flood risks and extreme weather demonstrates its commitment to SDG 13.

Noosa's longstanding commitment to environmental protection aligns with SDG 15, with the region protecting its biodiversity through strict development regulations and conservation programs. Noosa also leads in SDG 11, focusing on sustainable housing and eco-friendly tourism

5. Comparisons and Benchmarks

Regional development is increasingly informed by global and national best practices that leverage innovation, sustainability and collaboration to drive economic and social outcomes.

There are therefore often benefits from examining models successfully implemented in other parts of the world and across Australia. For this reason, this section provides an overview of approaches in comparable Australian and International regions, canvassing both areas of alignment and differences.

5.1 Regional Australia Case Examples

Australian regional development reveals diverse approaches to economic transformation and community adaptation. Through examining six distinctive regions across Australia's eastern and western seaboards, this analysis explores how different governance models, development strategies and sustainability approaches influence regional prosperity.

The comparative assessment below demonstrates how regions leverage their established economic foundations while embracing new opportunities, offering practical insights into effective regional development policy and implementation.

Gold Coast, Qld: Strategic Evolution in Tourism-Led Development

The Gold Coast exemplifies strategic regional transformation, evolving from a tourism-focused coastal centre into a multifaceted urban economy. The region's initial tourism foundation, built on beach culture and theme parks, provided the economic base for subsequent diversification into broader service sectors and creative industries.

The 2018 Commonwealth Games marked a pivotal moment in the Gold Coast's development trajectory. The event drove substantial public investment, with the Light Rail system representing a fundamental shift in urban mobility patterns. This infrastructure created new corridors of economic activity, linking coastal precincts with emerging commercial and residential zones.

The expansion into health and education sectors reflects deliberate policy choices to build economic resilience. The establishment of the Gold Coast Health and Knowledge Precinct, anchored by Griffith University and the Gold Coast University Hospital, demonstrates how tourism-derived capital can support knowledge-intensive development. This precinct now generates substantial employment in research, healthcare and advanced services.

The city's planning framework has adapted to support this economic transition. Mixed-use developments along the light rail corridor facilitate knowledge sector growth while maintaining tourism amenity. This integrated approach to urban development enables the Gold Coast to retain its tourism appeal while building sophisticated service sector capabilities.

The transformation has yielded measurable economic diversification. Tourism now operates alongside substantial health, education and professional service sectors, creating a more balanced economic structure. This evolution provides insights into how regions can leverage existing strengths to build more complex and resilient economic systems.

Northern Rivers, NSW: Cultural Innovation and Agricultural Heritage

The Northern Rivers region of NSW demonstrates sophisticated integration of agricultural heritage with contemporary economic development. Rich volcanic soils and reliable rainfall patterns underpin diverse agricultural production, from traditional dairy and sugar cane to emerging boutique crops. The region's agricultural sector has adapted through value-adding initiatives and organic certification programs, responding to changing consumer preferences and market opportunities.

Byron Bay exemplifies successful cultural economy development, where creative industries and lifestyle businesses generate substantial economic value. The town has evolved from a counter-cultural hub into a sophisticated creative precinct, attracting film production, digital media enterprises and arts organisations. This cultural vitality drives both economic activity and regional identity formation.

The region's wellness tourism sector builds on natural assets and cultural innovation. High-end health retreats, organic spa products and wellness education programs create distinctive offerings that command premium market positions. This sector demonstrates how environmental values can align with economic development, supporting both conservation and commercial outcomes.

Local economic networks facilitate knowledge exchange between agricultural producers, creative enterprises and tourism operators. These connections enable product innovation and market development, from paddock-to-plate initiatives to creative industry clusters. The region's development agencies support these networks through targeted programs and infrastructure provision.

Regional planning frameworks balance development pressures with environmental and cultural values. Local councils employ innovative planning mechanisms to protect agricultural land while enabling creative industry growth. This governance approach demonstrates how regions can maintain traditional strengths while fostering new economic opportunities.

The Northern Rivers' experience shows how regions can build economic resilience through sector diversification and strategic integration. The harmonisation of agricultural production, creative industries and tourism creates multiple economic drivers, reducing vulnerability to market fluctuations while maintaining regional character.

Port Macquarie-Hastings, NSW: Healthcare Innovation and Regional Specialisation

Port Macquarie-Hastings on the mid-North Coast of NSW, demonstrates how regions can strategically leverage demographic characteristics to create economic advantage. The region's significant retiree population, rather than being viewed solely as a service challenge, has become the foundation for sophisticated healthcare sector development.

The region has cultivated an integrated healthcare network encompassing public hospitals, specialist clinics and aged care facilities. This ecosystem extends beyond traditional medical services to include rehabilitation centres, preventive health programs and medical research initiatives. The Charles Sturt University rural medical training program exemplifies how educational partnerships strengthen regional healthcare capacity.

Strategic partnerships between healthcare providers and research institutions drive medical innovation. The Port Macquarie Base Hospital's clinical trials unit and specialised research programs demonstrate the region's commitment to advancing medical knowledge while serving local needs. These initiatives attract healthcare professionals and researchers, enriching the regional skills base.

The region's planning framework maintains environmental values while facilitating healthcare sector growth. Green corridors protect biodiversity while healthcare precincts concentrate medical services in accessible locations. This integrated approach ensures development enhances rather than diminishes natural amenity.

Healthcare sector growth stimulates allied business development, from medical technology suppliers to specialist accommodation services. This economic diversification strengthens regional resilience while creating employment opportunities across skill levels. Professional service firms increasingly support healthcare operations, broadening the regional economic base.

Investment in social infrastructure complements healthcare development, creating liveable communities that attract both medical professionals and retirees. Cultural facilities, recreational spaces and educational services support population retention while enhancing quality of life for all residents.

Geelong-Bellarine, Vic: Industrial Legacy to Innovation Economy

Geelong-Bellarine's economic reinvention following the closure of Ford and Alcoa manufacturing facilities demonstrates strategic adaptation to structural economic change. This transition required coordinated policy responses across multiple levels of government, supported by substantial public investment in research infrastructure and skills development.

Deakin University emerged as the primary catalyst for regional transformation, establishing research centres aligned with emerging industry needs. The university's Carbon Nexus facility exemplifies this approach, connecting traditional manufacturing expertise with advanced materials research and attracting international investment in composite technologies.

The Geelong Innovation Precinct represents sophisticated precinct planning, clustering research facilities, technology startups and advanced manufacturing operations. This concentration of innovation activity creates knowledge spillovers that benefit both established firms and emerging enterprises, particularly in advanced manufacturing and materials science.

Strategic workforce development programs support industrial workers' transition into knowledge economy roles. Technical training partnerships between Deakin University, The Gordon TAFE and industry partners ensure skill development aligns with emerging sector needs, particularly in advanced manufacturing and digital technologies.

The region has developed robust pathways for translating research into commercial outcomes. The ManuFutures manufacturing innovation hub demonstrates how public investment can catalyse private sector innovation, supporting the scale-up of research-driven enterprises.

The transformation of former industrial sites into innovation precincts reflects sophisticated urban renewal strategies. The Federal Mills technology precinct exemplifies this approach, repurposing heritage industrial infrastructure to support digital economy activities while maintaining connection to Geelong's manufacturing heritage.

Strengthened connections between Geelong's innovation economy and the Bellarine Peninsula's tourism sector create diversified economic opportunities. This integration demonstrates how regions can maintain multiple economic drivers while pursuing knowledge-intensive development.

The Hunter Region, NSW: Energy Innovation and Industrial Evolution

The Hunter Region's transformation from coal-based energy production to renewable technology leadership demonstrates sophisticated industrial adaptation. This shift encompasses strategic workforce planning, infrastructure repurposing and targeted investment in emerging energy technologies, supported by coordinated policy frameworks across government levels.

The University of Newcastle drives regional innovation through specialised research centres focusing on clean energy technologies and environmental remediation. The Newcastle Institute for Energy and Resources exemplifies this approach, connecting academic expertise with industry partners to accelerate energy transition initiatives.

Strategic partnerships between education providers and industry facilitate workforce transition from traditional energy sectors to renewable technologies. The Hunter TAFE Energy Centre coordinates with industry to develop training programs in solar, wind and hydrogen technologies, ensuring skills alignment with emerging sector needs.

Former industrial sites undergo strategic repurposing to support renewable energy innovation. The Williamtown Special Activation Precinct demonstrates how legacy infrastructure can support emerging technologies, particularly in hydrogen production and storage systems.

The Hunter Hydrogen Technology Cluster facilitates knowledge exchange between researchers, technology developers and industrial partners. This collaboration accelerates commercialisation of renewable energy innovations while maintaining the region's energy production expertise.

Sophisticated environmental management strategies support the transition from extractive industries to sustainable energy production. The Hunter Region Environmental Restoration Fund exemplifies how regions can address industrial legacies while creating new economic opportunities.

Strategic partnerships with international renewable energy developers strengthen the region's position in emerging markets. The Port of Newcastle's clean energy precinct development demonstrates how traditional industrial infrastructure can support new energy export opportunities.

Targeted investment attraction programs focus on renewable energy manufacturing and technology development. This approach maintains the region's energy sector prominence while creating sophisticated supply chain opportunities in emerging technologies. Copy

Margaret River-Busselton, WA: Agricultural Excellence and Tourism Integration

Margaret River-Busselton region in south west Western Australia exemplifies a successful integration of premium agricultural production with high-value tourism experiences. The region's viticultural expertise, developed over five decades, underpins a comprehensive food and wine economy that generates substantial export earnings while also supporting experiential tourism development.

Over this period, the wine industry has demonstrated a remarkable adaptation to changing market conditions through technical innovation and brand development. Premium producers increasingly incorporate sustainable practices, from organic certification to water-efficient viticulture, strengthening market position while enhancing environmental outcomes.

This integration extends beyond traditional wine tourism to encompass culinary education, agricultural heritage interpretation and innovative food experiences that command premium market positions. The Margaret River Gourmet Escape, for example, represents sophisticated event-based tourism that leverages agricultural excellence.

Regional governance frameworks balance agricultural intensification with biodiversity protection. The Margaret River-Busselton Environmental Stewardship Program demonstrates how production systems can enhance rather than diminish environmental values through innovative land management practices.

Strategic investment in processing infrastructure and distribution systems supports value addition across the agricultural sector. The region's food manufacturing capabilities enable producers to capture additional value through product differentiation and market development.

Collaboration between producers, research institutions and tourism operators drives continuous innovation. The South West Development Commission's innovation programs

facilitate knowledge exchange while supporting new product development and market access initiatives.

The region increasingly integrates cultural production with agricultural excellence. Artist residencies, cultural events and creative enterprises contribute to destination appeal while strengthening regional identity and economic diversification.

Sophisticated community engagement processes maintain social license for agricultural development. Regular consultation mechanisms ensure development aligns with community values while protecting the region's distinctive character and environmental assets.

Regional Transformation and Strategic Adaptation: Learning from Australia's Development Success Stories

These regional case studies reveal several key success elements that relevant to the RDAMBSC's economic development pathway.

Strategic Economic Diversification

The Gold Coast's evolution from tourism-centric development to a knowledge-intensive economy offers particularly salient insights. Its success in leveraging existing strengths whilst building new capabilities demonstrates how regions can orchestrate systematic economic transformation. The establishment of the Health and Knowledge Precinct shows how anchor institutions can catalyse broader economic diversification.

Infrastructure as an Economic Catalyst

The transformative impact of the Gold Coast Light Rail system illustrates how strategic infrastructure investment can reshape economic geography. This infrastructure created new economic corridors and facilitated precinct development, suggesting the importance of the RDAMBSC's consideration of how infrastructure investments can similarly create new economic possibilities and connect discrete activity centres.

Knowledge Economy Development

Geelong-Bellarine's response to industrial transition provides compelling evidence for the power of research institutions as economic catalysts. Deakin University's role, particularly through specialist facilities like Carbon Nexus, demonstrates how tertiary education can bridge traditional industrial expertise with emerging opportunities. This suggests value in exploring similar knowledge economy pathways.

Agricultural Innovation and Value Addition

Margaret River-Busselton's sophisticated integration of premium agricultural production with tourism experiences offers valuable insights for regions with strong agricultural foundations. Its success in developing high-value products while maintaining environmental values

demonstrates that traditional sectors can evolve toward premium market positions through innovation and strategic positioning.

Governance and Community Engagement

The Northern Rivers' experience highlights the importance of balanced governance frameworks that protect existing values while enabling new economic opportunities. Their success in maintaining agricultural productivity while fostering creative industries demonstrates how thoughtful planning can support economic diversification without compromising regional character.

Healthcare Sector Development

Port Macquarie-Hastings' approach to leveraging its demographic characteristics for healthcare sector development presents an interesting model for regions with similar population profiles. Its success in building an integrated healthcare ecosystem suggests opportunities for developing sophisticated service sectors that respond to population needs while creating broader economic benefits.

Environmental Integration

The Hunter Region's transformation toward renewable energy leadership demonstrates how environmental challenges can become economic opportunities. The region’s success in repurposing industrial infrastructure and developing new technical capabilities suggests pathways for incorporating sustainability into economic development strategies.

Institutional Architecture

The most successful regions demonstrated sophisticated institutional arrangements supporting economic transformation. This suggests RDAMBSC might benefit from examining its institutional capabilities and partnership arrangements, particularly regarding:

- Research and education partnerships
- Industry collaboration frameworks
- Cross-government coordination mechanisms
- Community engagement processes

By carefully considering these elements within local context, RDAMBSC can develop more robust approaches to regional development while maintaining flexibility to respond to emerging opportunities and challenges.

Implementation Considerations

Success in these cases consistently relied on several key elements:

- Strong institutional partnerships, including with education providers

- Strategic infrastructure investment aligned with economic objectives
- Sophisticated governance frameworks balancing multiple interests
- Clear sector development strategies built on regional advantages.

These cases collectively suggest that successful regional development requires both strategic vision and sophisticated implementation capabilities. The challenge for RDAMBSC lies in adapting these insights to local conditions while maintaining focus on distinctive regional advantages and opportunities.

5.2 International Regional Case Examples

Economic development approaches in several international regions offer insights into effective models, particularly innovation, environmental sustainability and industrial diversification.

New Zealand's South Island: Traditional Strengths and Modern Challenges

The South Island's economic architecture rests on sophisticated agricultural systems that transcend traditional farming paradigms. World-class dairy operations leverage advanced technologies and sustainable practices, while the viticulture sector produces internationally acclaimed wines. These operations demonstrate remarkable adaptability to changing market conditions and environmental pressures.

Agricultural success has catalysed the development of advanced food processing capabilities and specialised manufacturing clusters. Local producers have established innovative supply chains that maximise value retention within the region. This integration has fostered technological advancement in processing methods and created resilient economic networks throughout the South Island.

The South Island's tourism sector exemplifies the delicate balance between economic opportunity and environmental stewardship. Queenstown's evolution into a global adventure tourism hub demonstrates successful destination development, while Fiordland's managed access policies reflect growing awareness of carrying capacity limitations in sensitive natural areas.

Tourism dependency creates complex economic vulnerabilities, particularly regarding seasonal fluctuations and external market shocks. The sector's reliance on pristine natural environments necessitates careful management of visitor impacts and infrastructure development, whilst maintaining the authentic experiences that attract high-value tourists.

Remote communities across the South Island face significant connectivity challenges that impact economic diversification efforts. Limited digital infrastructure in rural areas creates barriers to innovation adoption and restricts the growth of knowledge-intensive industries. This digital divide threatens to entrench economic disparities between urban and rural communities.

Despite infrastructure limitations, emerging technology clusters in regional centres demonstrate potential for economic diversification. Strategic investment in

telecommunications infrastructure could catalyse growth in digital services, remote work opportunities, and technology-enabled primary industry innovations.

The South Island's economic directions balance traditional strengths with emerging opportunities. Successful adaptation requires targeted infrastructure investment, particularly in digital connectivity, while maintaining the environmental values that underpin both agricultural and tourism success.

Sarasota's Cultural and Economic Renaissance: A Strategic Analysis

Sarasota has cultivated a position as a premier cultural destination in Florida USA, distinguishing itself through a blend of performing arts venues, museums and cultural festivals. This strategic positioning transcends typical coastal tourism, acting as an attractor for both high value visitors and skilled residents.

A vibrant artistic ecosystem flourishes through interconnected networks of galleries, theatres and creative spaces. The Van Wezel Performing Arts Hall and Ringling Museum anchor this cultural landscape, whilst smaller venues and artistic collectives also contribute to the local the local economy.

In recent years a strategic diversification beyond traditional cultural tourism has emerged, with innovation hubs and creative industry incubators fostering entrepreneurial growth in digital media, design services, and cultural technology. This evolution demonstrates Sarasota's capacity to leverage its cultural assets whilst embracing contemporary economic opportunities.

The region's healthcare infrastructure is also a key component of its economic framework. Its medical facilities and specialised geriatric care services not only services the resident population but acts as a powerful drawcard for affluent retirees seeking high-quality medical care in a culturally enriched environment.

The seamless integration of healthcare services, cultural attractions and emerging creative industries has created a self-reinforcing economic ecosystem and maintains Sarasota's competitive advantage in Florida's increasingly dynamic coastal

Costa del Sol: A Multifaceted Analysis of Tourism-Led Development

The Costa del Sol's economic growth exemplifies the transformative potential of strategic tourism development. This Spanish Mediterranean coastline has evolved from a collection of fishing villages into a globally recognised tourism powerhouse, leveraging its climate and cultural heritage to create a sustainable year-round visitor economy.

Historic towns like Marbella and Nerja have retained their authentic charm whilst hosting modern amenities, and across the region sophisticated hospitality infrastructure underpins this tourism success.

From boutique hotels to integrated resorts, the Costa del Sol has cultivated a mix accommodation options and a recreational ecosystem, including marinas, golf courses and

cultural venues, that extends its appeal maximising its offering to a diverse visitor demographic.

Tourism-driven development has generated significant economic spillovers, fostering growth in auxiliary sectors such as retail, gastronomy and professional services. This economic diversification, though still anchored in tourism, has created resilient local economies capable of sustaining year-round employment and business opportunities.

International capital flows have shaped the region's development trajectory, with property investment serving as both a driver and indicator of economic vitality. The interplay between tourism success and property market dynamics creates self-reinforcing growth cycles, though this relationship also presents potential vulnerabilities to external market shifts.

Drawing Strategic Insights from Regional Development Models

The case studies present rich learning opportunities for RDAMBSC's development trajectory, particularly in balancing economic diversification with cultural authenticity and environmental stewardship. Let me analyse the key insights through several strategic lenses.

Leveraging Cultural Assets for Distinctive Development

Sarasota's experience demonstrates how cultural institutions can serve as foundational elements for economic development. The seamless integration of performing arts, museums, and creative spaces has created a self-reinforcing ecosystem that attracts both visitors and permanent residents. RDAMBSC could adapt this approach by strategically developing cultural anchors that reflect Saudi heritage while fostering contemporary creative industries.

Environmental Stewardship and Economic Growth

The South Island's experience offers valuable insights into managing environmental assets alongside economic development. Their balanced approach to tourism development, particularly in managing visitor impacts whilst maintaining authentic experiences, provides a practical framework for RDAMBSC. The emphasis on carrying capacity and managed access policies could inform RDAMBSC's approach to sustainable tourism development.

Infrastructure as an Enabler of Innovation

The South Island's challenges with digital connectivity highlight the critical importance of robust infrastructure planning. For RDAMBSC, this underscores the necessity of embedding comprehensive digital infrastructure from the outset, enabling the growth of knowledge-intensive industries and supporting innovation across all sectors.

Creating Synergistic Economic Ecosystems

Costa del Sol's development model demonstrates how initial tourism success can catalyse broader economic development. Their approach to developing diverse hospitality infrastructure alongside authentic cultural experiences offers valuable lessons for RDAMBSC in creating multiple vectors for visitor engagement while maintaining local character.

Strategic Investment Attraction

The interplay between tourism, property development, and international investment in Costa del Sol provides insights into creating self-reinforcing growth cycles. However, their experience also highlights the importance of managing potential vulnerabilities to external market shifts, suggesting RDAMBSC should pursue a diversified investment attraction strategy.

Building Resilient Service Sectors

Sarasota's healthcare ecosystem demonstrates how specialised service sectors can complement tourism and cultural offerings. This suggests opportunities for RDAMBSC to develop distinctive service capabilities that cater to both resident and visitor needs while creating high-value employment opportunities.

These regional experiences collectively emphasise the importance of balanced, strategic development that respects local character while embracing innovation and economic diversification. The key for RDAMBSC lies in adapting these insights to its unique context whilst maintaining authenticity and environmental sustainability.

6. Conclusion

The RDAMBSC region stands at a pivotal moment in its development trajectory. This *Insights Report* reveals a region that has successfully leveraged its natural assets and strategic location to build diverse economic strengths, while positioning itself for future growth through innovation and sustainability initiatives.

The region's economic foundation rests on several key pillars. Healthcare and social assistance, as the largest contributor to regional value-added, reflects both current strengths and future opportunities, particularly in light of demographic trends and emerging health technologies.

The construction sector's significant contribution underscores the region's dynamic growth, while also highlighting challenges in housing affordability and infrastructure development. Tourism and hospitality continue to play vital roles, especially in Noosa and the Sunshine Coast, though the sector is evolving toward more sustainable and high-value offerings.

Critically, the region is actively transitioning toward knowledge-intensive industries. The presence of the International Broadband Submarine Cable, coupled with growing innovation precincts and technology hubs, positions the region favourably in the digital economy.

Advanced manufacturing initiatives, particularly in Moreton Bay, demonstrate the potential for industrial modernization, while research partnerships through the University of the Sunshine Coast strengthen the innovation ecosystem.

However, several challenges require ongoing attention. Housing affordability pressures, particularly acute in Noosa and the Sunshine Coast, risk impacting workforce attraction and retention. Skills shortages in key sectors like healthcare, construction, and digital technologies necessitate stronger alignment between education providers and industry needs. Transport infrastructure, especially the Bruce Highway corridor, requires continued investment to support regional connectivity and growth.

The region's commitment to sustainability and climate action, exemplified by initiatives like the Sunshine Coast Solar Farm and the UNESCO Biosphere Reserves in Noosa and Sunshine Coast, provides a strong foundation for environmentally conscious development. This positions the region well to capitalize on growing opportunities in renewable energy, sustainable tourism, and green technology.

Looking ahead, the 2032 Brisbane Olympic and Paralympic Games present a unique catalyst for accelerating infrastructure development and enhancing the region's global profile. Success will depend on maintaining the delicate balance between growth and preservation of the natural and cultural assets that define the region's character.

The RDAMBSC's future prosperity will be shaped by its ability to:

- Foster innovation while maintaining environmental stewardship
- Attract and retain skilled workers while addressing housing affordability
- Develop infrastructure that supports growth while preserving liveability
- Strengthen economic diversity while building on existing strengths
- Embrace technological change while protecting community values.

Through cohesive effort and strategic focus on these priorities, the RDAMBSC region is well-positioned to emerge as a leading example of balanced regional development, combining economic dynamism with environmental sustainability and social inclusion. The foundations are in place for sustained prosperity, provided the region continues to adapt and innovate in response to emerging opportunities and challenges.

Appendix: Regional Development Policy Landscape

Strategic investments and policies at the federal, state and local levels shape the development landscape of the Moreton Bay, Sunshine Coast and Noosa region. These policies focus on enhancing infrastructure, fostering innovation and ensuring sustainable growth to accommodate the region's rapidly growing populations.

Industry-led initiatives, social infrastructure development and regional partnerships further define this landscape. This appendix summarises key policies, initiatives and investments relevant to regional growth.

Federal Government

Key Development Strategies and Initiatives

The Australian Federal Government plays a role in regional development through national policies, funding programs and infrastructure investments to promote economic growth, innovation and sustainability in regional Australia. It has supported projects through many programs, including the Building Better Regions Fund (BBRF), the Regional Growth Fund (RGF) and the City Deals Program.

Recent national policy settings sharpen the relevance of regional planning. The Australian Government's 2025 Population Statement notes that population growth is expected to moderate as net overseas migration continues to fall from its post-COVID peak, but that demographic change will continue to affect workforce, housing, infrastructure and service demand. The Employment White Paper, Working Future, provides the broader national labour-market framework, with objectives focused on sustained and inclusive full employment, job security and wage growth, productivity, skills formation and broader opportunity.

The Sunshine Coast's International Broadband Submarine Cable was partly funded by the federal government through this initiative, positioning the region as a key player in the digital economy

Projects supported by the BBRF and RGF have included:

Region	Project Name	Description	Funding Source	Funding Amount
Moreton Bay	USC Moreton Bay Campus	Development and expansion of the University of the Sunshine Coast (USC) Petrie campus, enhancing higher education and research.	RGF & BBRF	$50 million (RGF)
Moreton Bay	Industrial and Community Projects	Various infrastructure improvements including road upgrades and industrial park development to foster economic growth.	RGF	Varies by project
Sunshine Coast	Peregian Digital Hub	Development of a digital hub to support IT enterprises and grow the region's digital economy.	BBRF	$2 million
Sunshine Coast	Sunshine Beach Surf Life Saving Club Redevelopment	Rebuilding and upgrading the clubhouse to improve community safety and support emergency response infrastructure.	BBRF	$2.5 million
Sunshine Coast	Caloundra Rugby Union Club Lighting Project	Installation of LED lighting to improve facility usability and support local sports development.	BBRF	$100,000
Sunshine Coast	We Help Ourselves Residential Facility, Nambour	Development of a community residence for disadvantaged groups, contributing to social inclusion.	BBRF	$2.72 million (various projects

Queensland Government

Key Development Strategies and Initiatives

The Queensland Government is committed to regional growth through a range of policies and initiatives that address economic diversification, infrastructure development and sustainable industry practices. The Queensland Economic Recovery Plan and Advance Queensland are particularly significant for Moreton Bay, Sunshine Coast and Noosa.

Queensland's workforce policy context is framed by the Queensland Workforce Strategy 2022–2032. The strategy is organised around three broad imperatives: attracting and retaining a skilled workforce, connecting industry, community and government to more Queenslanders, and boosting the skills, adaptability and participation of the workforce. This policy frame is directly relevant to RDAMBSC, where skills shortages remain pronounced in care, construction, digital and technical occupations.

- **Queensland Economic Recovery Plan**: This plan outlines key priorities for driving recovery in regional Queensland in response to the COVID-19 pandemic and broader economic challenges. For the Sunshine Coast and Moreton Bay, key focus areas include job creation in healthcare, tourism, advanced manufacturing and infrastructure and housing investments.
- Advance Queensland: This innovation-focused initiative provides funding and support for entrepreneurs, start-ups and research institutions in emerging industries. Moreton Bay, Sunshine Coast and Noosa are positioned to benefit through support for innovation hubs and partnerships between businesses and universities, particularly in areas such as clean energy, digital industries and healthcare technologies.
- **Queensland Renewable Energy Zones (QREZ)**: As part of the state's broader commitment to transitioning towards renewable energy, the Sunshine Coast has been identified as a potential area for clean energy projects, including solar and battery storage solutions. The QREZ initiative seeks to unlock new investment opportunities in renewable energy infrastructure, creating jobs and reducing the region's carbon footprint.