



MORETON BAY REGIONAL COUNCIL

# Demographic Case for a University in the Greater Moreton Bay Region

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23 October 2015

# Reasons to believe in Australia's future



## BIGGEST \$US trillions

1.	United States	17.419
2.	China	10.380
3.	Japan	4.616
4.	Germany	3.860
5.	United Kingdom	2.945
6.	France	2.847
7.	Brazil	2.353
8.	Italy	2.148
9.	...	
<b>12.</b>	<b>Australia</b>	<b>1.444</b>



## RICHEST GDP \$US per capita - 2014

1.	Norway	97,000
2.	Switzerland	87,000
<b>3.</b>	<b>Australia</b>	<b>61,000</b>
4.	Sweden	58,000
5.	United States	55,000
6.	Netherlands	51,000
7.	Canada	50,000
8.	Belgium	48,000
9.	Germany	48,000
10.	United Kingdom	46,000



## FASTEST-RISING 2009 to 2014

1.	China	98%
2.	Nigeria	85%
3.	Korea	53%
4.	Saudi Arabia	52%
5.	Russia	51%
6.	Indonesia	43%
7.	India	40%
8.	Argentina	36%
9.	Mexico	35%
10.	...	
<b>11.</b>	<b>Australia</b>	<b>34%</b>

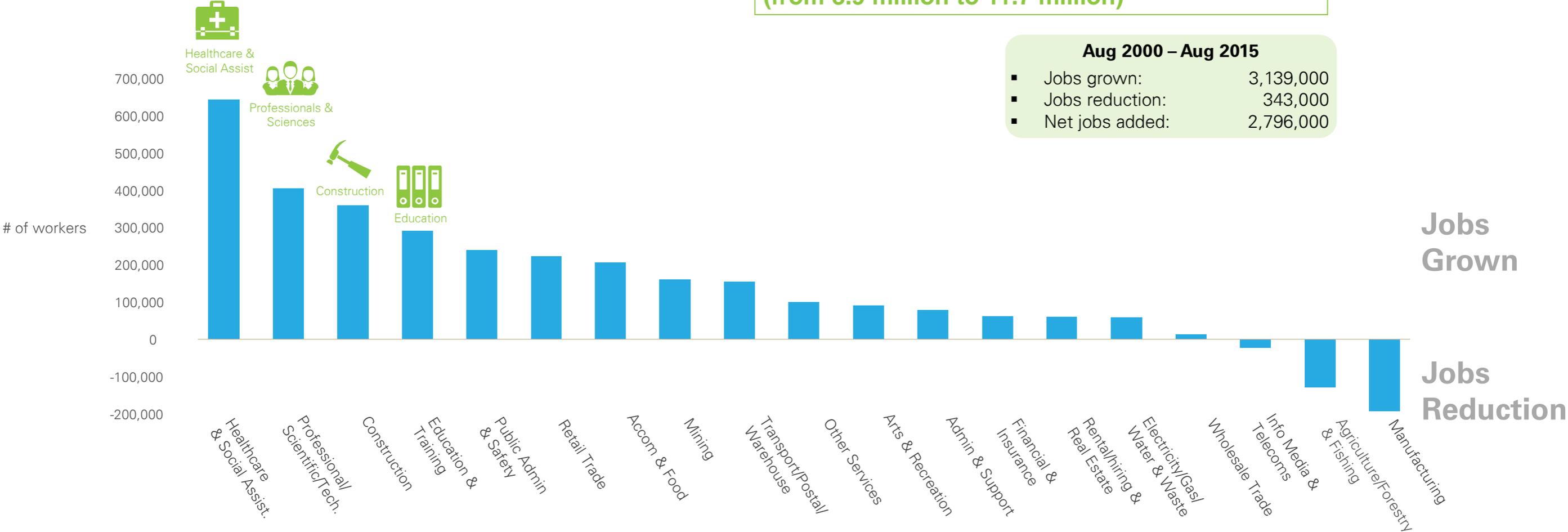
# Business opportunities in knowledge and technical work this century



**15 years to Aug 2015 – up 2.8 million workers  
(from 8.9 million to 11.7 million)**

**Aug 2000 – Aug 2015**

- Jobs grown: 3,139,000
- Jobs reduction: 343,000
- Net jobs added: 2,796,000



Source: Based on Australian Bureau of Statistics data; KPMG Demographics

# Brisbane promises to be the demographic shock city of the 21<sup>st</sup> century



1954		
1	Sydney	1,863,000
2	Melbourne	1,524,000
3	<b>Brisbane</b>	<b>502,000</b>
4	Adelaide	484,000
5	Perth	349,000
6	Newcastle	178,000
7	Hobart	95,000
8	Wollongong	91,000
9	Geelong	72,000
10	Launceston	49,000
11	Ballarat	48,000
12	Toowoomba	43,000
13	Rockhampton	41,000
14	Townsville	40,000
15	Ipswich	39,000
16	Bendigo	37,000
17	Broken Hill	31,000
18	Canberra	28,000
19	Blue Mountains	23,000
20	Kalgoorlie	23,000

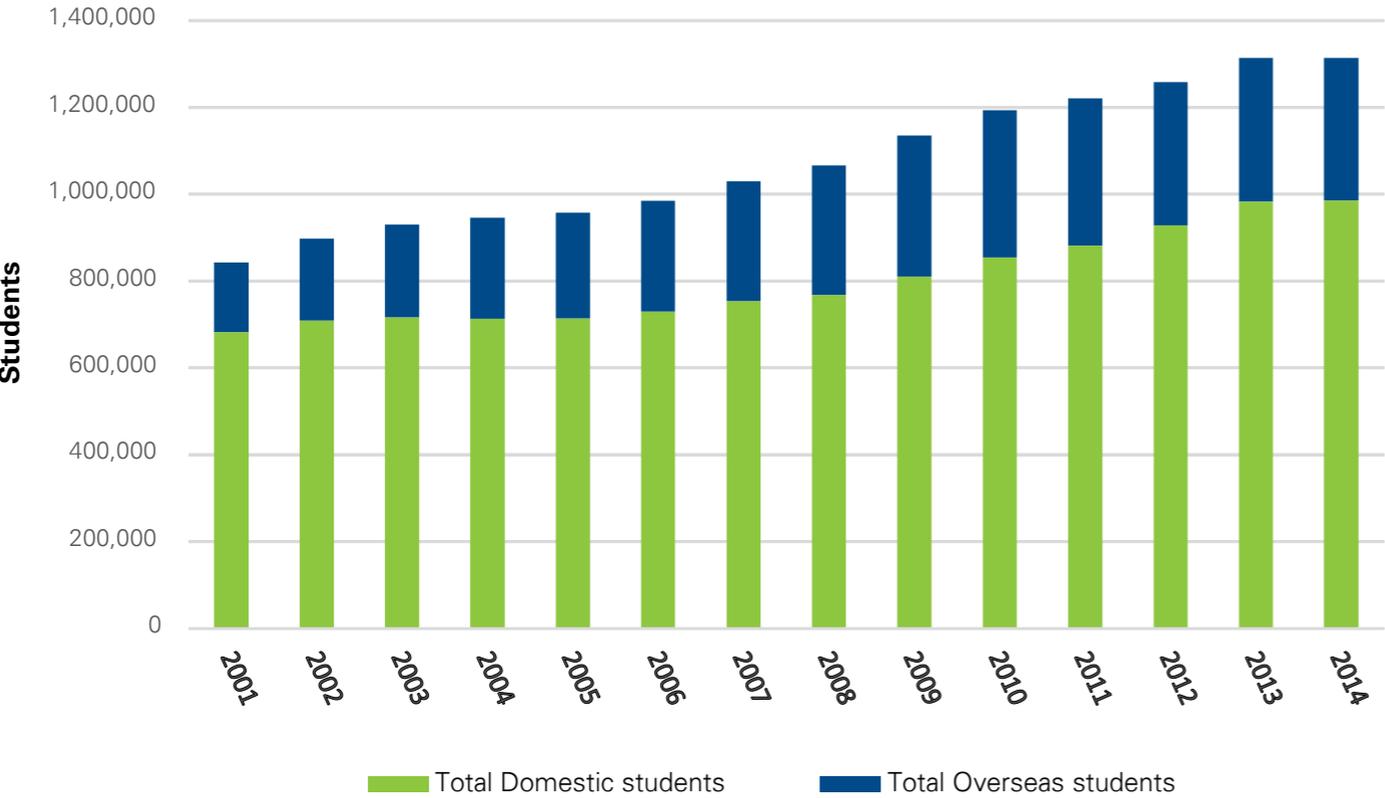
2014		
1	Sydney	4,841,000
2	Melbourne	4,440,000
3	<b>Brisbane*</b>	<b>2,275,000</b>
4	Perth	2,021,000
5	Adelaide	1,305,000
6	Gold Coast - Tweed	615,000
7	Newcastle - Maitland	431,000
8	Canberra - Queanbeyan	423,000
9	Sunshine Coast	298,000
10	Wollongong	289,000
11	Greater Hobart	219,000
12	Geelong	184,000
13	Townsville	180,000
14	Cairns	147,000
15	Greater Darwin	139,000
16	Toowoomba	114,000
17	Ballarat	99,000
18	Bendigo	92,000
19	Albury - Wodonga	88,000
20	Launceston	87,000

2050		Growth (2014-50)		
		#	%	
1	Sydney	7,688,000	2,847,000	59%
2	Melbourne	7,670,000	3,230,000	73%
3	Perth	4,633,000	2,612,000	129%
4	<b>Brisbane</b>	<b>4,188,000</b>	<b>1,913,000</b>	<b>84%</b>
5	Adelaide	1,797,000	492,000	38%
6	Gold Coast - Tweed	1,225,000	610,000	99%
7	Canberra - Queanbeyan	722,000	299,000	71%
8	Newcastle - Maitland	588,000	157,000	36%
9	Sunshine Coast	503,000	205,000	69%
10	Wollongong	384,000	95,000	33%
11	Townsville	340,000	160,000	89%
12	Geelong	301,000	117,000	64%
13	Greater Hobart	265,000	46,000	21%
14	Cairns	225,000	78,000	53%
15	Greater Darwin	209,000	70,000	50%
16	Toowoomba	197,000	83,000	73%
17	Mackay	193,000	107,000	122%
18	Ballarat	181,000	82,000	83%
19	Bendigo	161,000	69,000	75%
20	Rockhampton	142,000	61,000	75%

\*Moreton Bay Regional Council 2014 population: 417,137 (as part of total Brisbane population in 2014)

Source: Based on data from the Australian Bureau of Statistics; relevant State Government planning authorities and the Moreton Bay Regional Council

# The University-student life form is expanding... either bigger campuses or more Universities or both



Note: This data shows Australian University enrolments only  
Source: Australian Universities – Australian Government Department of Education and Training

## 2014

- ▶ 1.3 million students
- ▶ 329,000 from overseas
- ▶ Student population growing by 36,000 per year (6 year average)
- ▶ 40 universities now
- ▶ Average 33,000 per institution
- ▶ Moreton Bay University build-out to accommodate 10,000 students within 10 years



# There's around 1.3 million University students in Australia today ...



Rank	University	Total University students 2014*	Percentage change 2008 to 2014
1	Monash University	67,076	19%
2	RMIT University	59,213	27%
3	The University of Sydney	55,975	16%
4	The University of Melbourne	55,596	24%
5	The University of New South Wales	53,481	20%
<b>6</b>	<b>The University of Queensland</b>	<b>50,749</b>	<b>33%</b>
7	Curtin University of Technology	50,429	24%
8	Deakin University	49,185	37%
<b>9</b>	<b>Queensland University of Technology</b>	<b>47,218</b>	<b>20%</b>
<b>10</b>	<b>Griffith University</b>	<b>45,296</b>	<b>22%</b>

Rank	University	Total University students 2014*	Percentage change 2008 to 2014
<b>11</b>	<b>University of Western Sydney</b>	<b>43,885</b>	<b>32%</b>
<b>12</b>	<b>Macquarie University</b>	<b>39,637</b>	<b>21%</b>
<b>13</b>	<b>Charles Sturt University</b>	<b>39,275</b>	<b>21%</b>
<b>14</b>	<b>The University of Technology, Sydney</b>	<b>39,032</b>	<b>21%</b>
<b>15</b>	<b>The University of Newcastle</b>	<b>37,414</b>	<b>32%</b>
<b>16</b>	<b>La Trobe University</b>	<b>35,081</b>	<b>21%</b>
<b>17</b>	<b>Swinburne University of Technology</b>	<b>34,609</b>	<b>70%</b>
<b>18</b>	<b>The University of South Australia</b>	<b>31,962</b>	<b>-11%</b>
<b>19</b>	<b>The University of Wollongong</b>	<b>31,395</b>	<b>34%</b>
<b>20</b>	<b>Australian Catholic University</b>	<b>29,613</b>	<b>82%</b>

Note: Total students 2014 is defined as *Total full-time and part-time students by University including all modes of attendance (Internal, External & Multi-load) for the 2014 full year.*  
 Source: Department of Education & Training 2014

... this market is growing by 36,000 students per year or by 25 per cent over the last six years

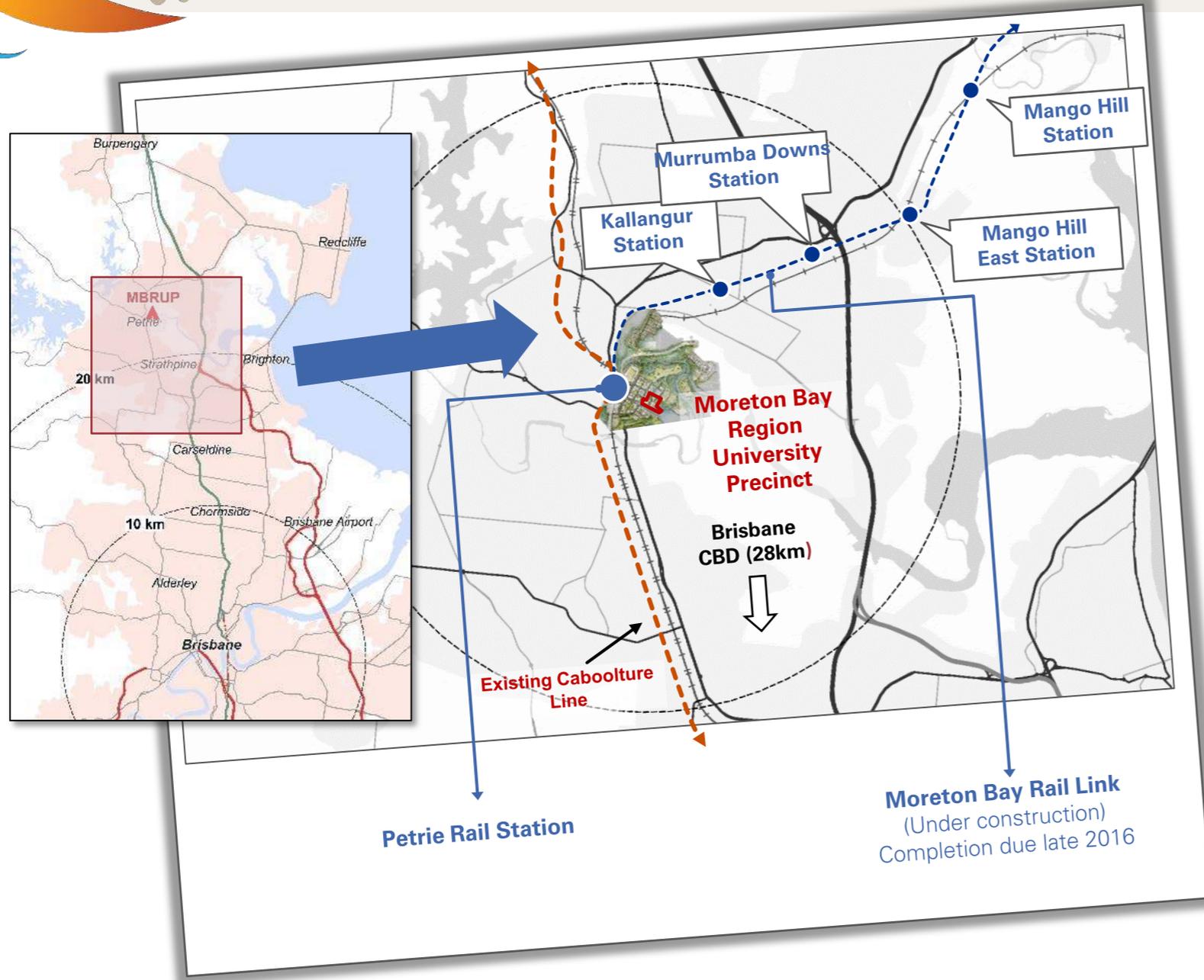


Rank	University	Total University students 2014*	Percentage change 2008 to 2014
21	University of Tasmania	29,293	46%
22	Victoria University	27,904	34%
23	<b>University of Southern Queensland</b>	<b>27,460</b>	<b>13%</b>
24	The University of Adelaide	27,167	29%
25	Edith Cowan University	26,692	10%
26	The University of Western Australia	26,379	32%
27	Murdoch University	24,137	45%
28	Flinders University of South Australia	24,293	50%
29	The Australian National University	22,393	35%
30	<b>James Cook University</b>	<b>22,251</b>	<b>35%</b>

Rank	University	Total University students 2014*	Percentage change 2008 to 2014
31	The University of New England	21,415	22%
32	<b>Central Queensland University</b>	<b>19,396</b>	<b>4%</b>
33	The University of Canberra	16,920	51%
34	Southern Cross University	14,484	-4%
35	Federation University Ballarat	14,221	8%
36	University of Notre Dame Australia	11,849	68%
37	<b>University of the Sunshine Coast</b>	<b>11,629</b>	<b>65%</b>
38	Charles Darwin University	11,559	83%
39	Bond University	5,880	-2%
40	University of Divinity	1,508	18%

Note: Total students 2014 is defined as *Total full-time and part-time students by University including all modes of attendance (Internal, External & Multi-load) for the 2014 full year.*  
 Source: Department of Education & Training 2014

# The MBRUP commands the Greater Moreton Bay Region

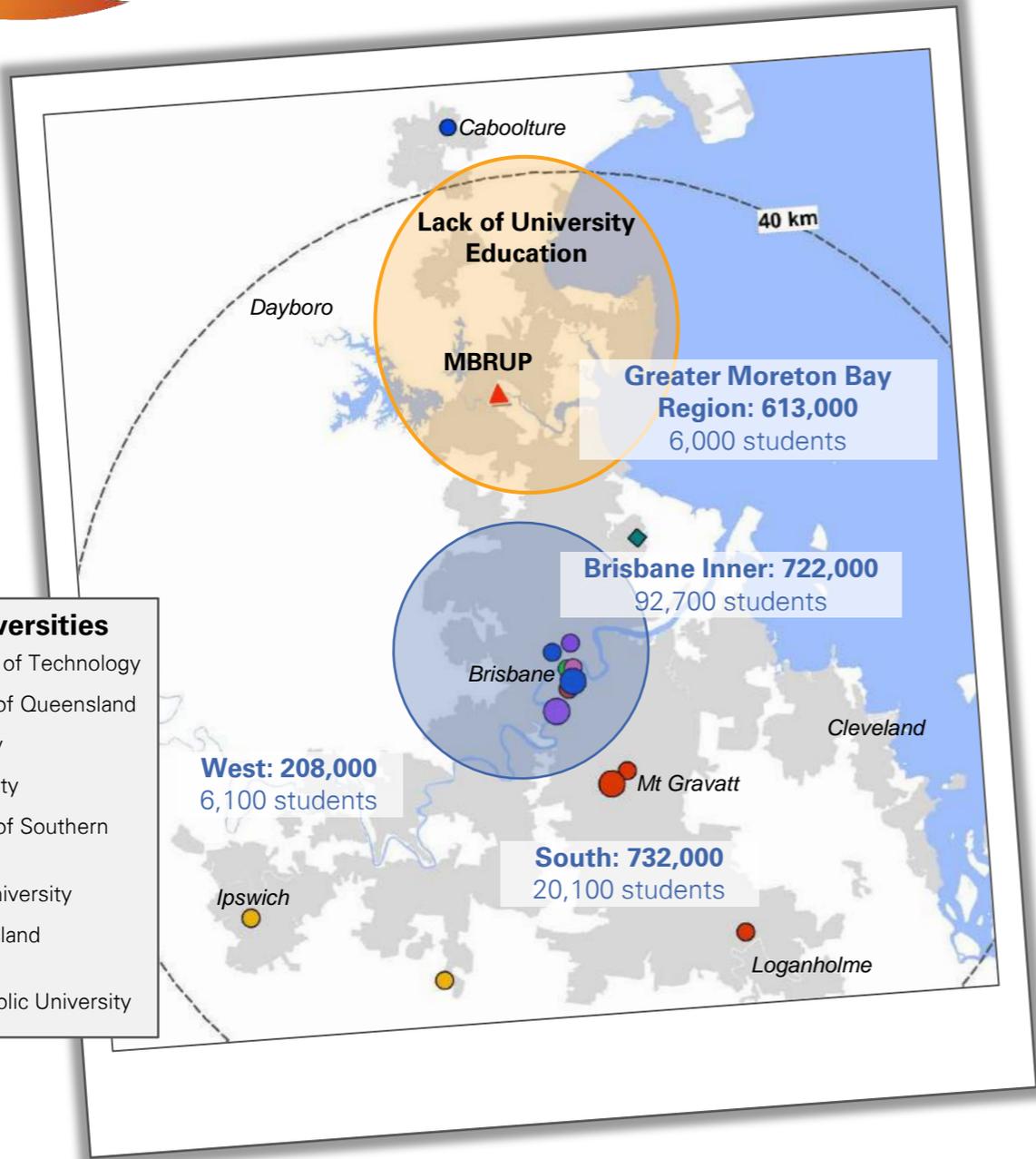


 **2014**

- ▶ MBRUP is located in the Moreton Bay Regional Council area
- ▶ Proposed mixed use development
- ▶ University campus
- ▶ Proposed hospital
- ▶ Technology park
- ▶ Residential
- ▶ Rail connectivity
- ▶ Site area 16 sqkm
- ▶ 28 km north of Brisbane CBD

Source: Moreton Bay Regional Council  
January 2015, MapInfo Professional

# The Greater Moreton Bay Region is all but a Uni-free zone!



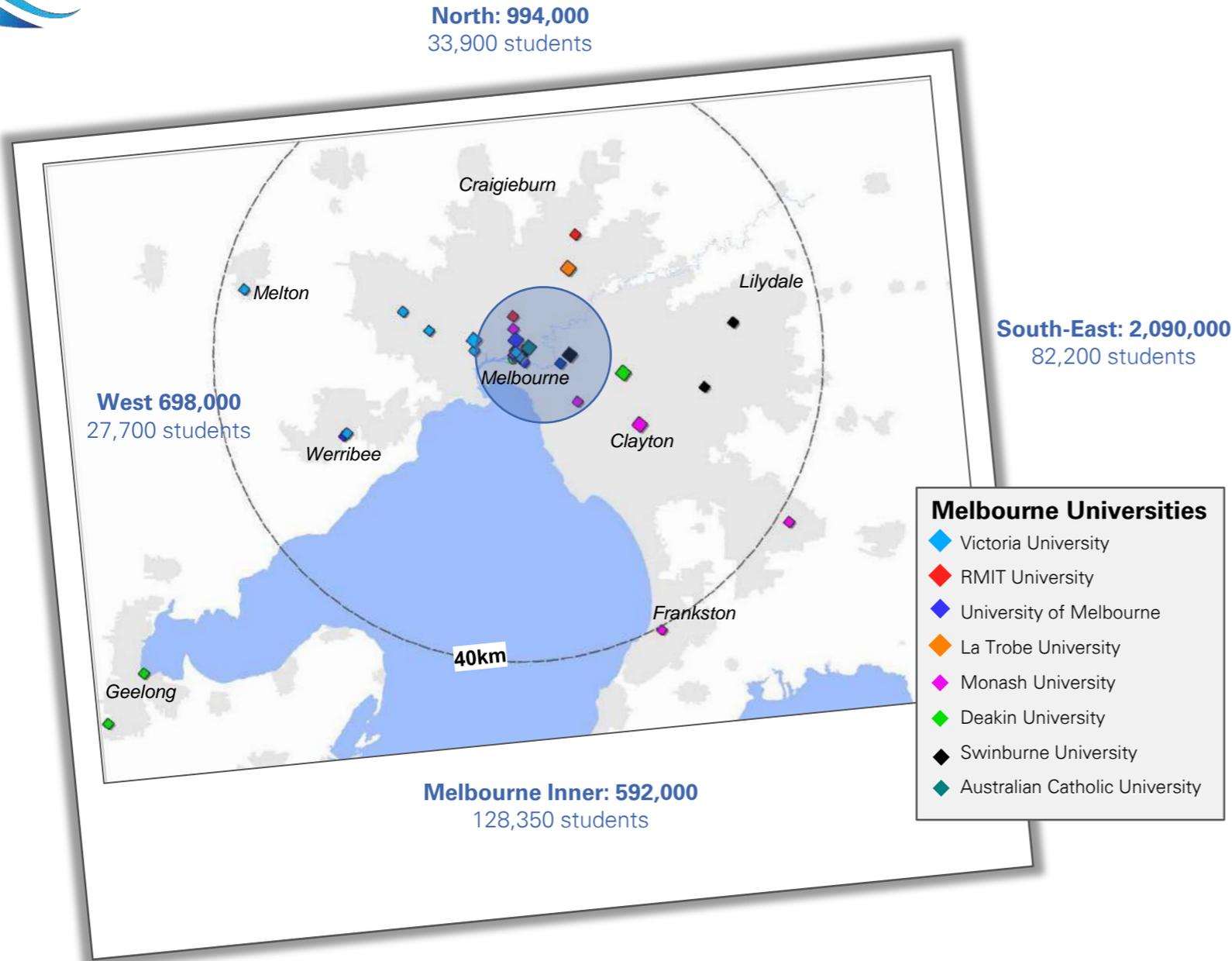
- Brisbane Universities**
- QLD University of Technology
  - The University of Queensland
  - Bond University
  - Griffith University
  - The University of Southern Queensland
  - James Cook University
  - Central Queensland University
  - ◆ Australian Catholic University

Region	Population 2014	University students 2014
<b>Greater Moreton Bay Region</b>	<b>613,000</b>	<b>6,000</b>
<b>Brisbane inner</b>	722,000	92,700
<b>Brisbane west</b>	208,000	6,100
<b>Brisbane south</b>	732,000	20,100
<b>Gold Coast</b>	610,000	27,500
<b>Sunshine Coast</b>	339,000	10,400

Note: Approximate students includes domestic and international students  
 Source: MapInfo, Estimated Residential Population 2014, Australian Government Education & Training 2014



# Melbourne has Universities to service its suburbs



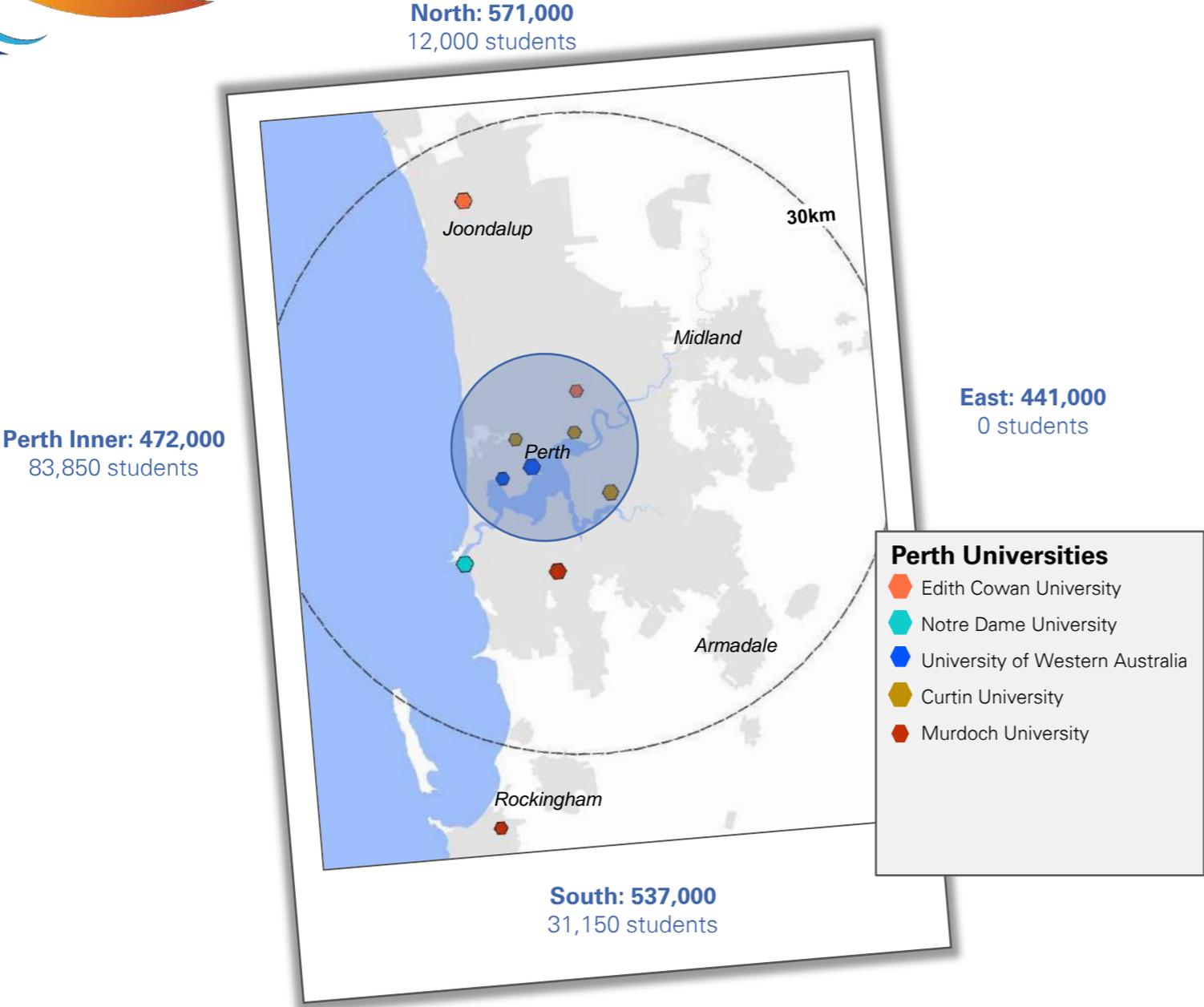
Region	Population 2014	University students 2014
Melbourne north	994,000	33,900
Melbourne inner	592,000	128,350
Melbourne west	698,000	27,700
Melbourne south-east	2,090,000	82,200
Greater Geelong	225,000	11,050
Melbourne north	994,000	33,900

Source: MapInfo, Estimated Residential Population 2014, Australian Government Education & Training 2014

\*\*Notes: Approximate students includes domestic and international students  
Source: MapInfo, Estimated Residential Population 2014, Australian Government Education & Training 2014



# Even Perth has University campuses north side and south side



Region	Population 2014	University students 2014
Perth Inner	472,000	83,850
East	441,000	0
North	571,000	12,000
South	537,000	31,150

Source: MapInfo, Estimated Residential Population 2014, Australian Government Education & Training 2014



# The Greater Moreton Bay Region has been over-looked by the knowledge worker development industry

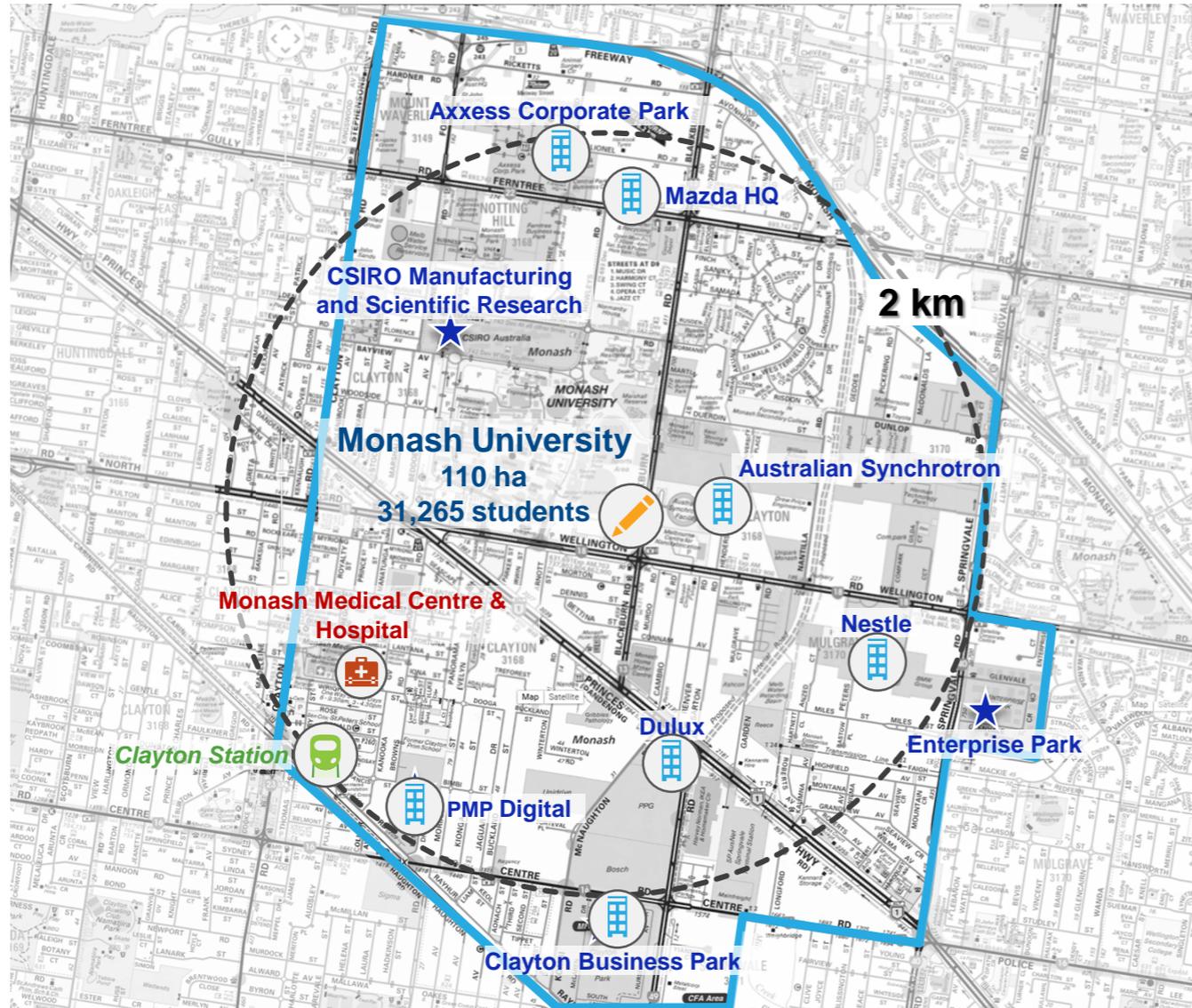


	Region	Population 2014	University students 2014	University students per 1,000 Pop.	Student Population 2014	Escape/ Captured students 2014
1.	<b>Greater Moreton Bay Region</b>	613,000	6,000	10	19,000	-13,000
2.	<b>Brisbane South</b>	732,000	20,000	21	31,000	-11,000
3.	<b>Inner Brisbane</b>	722,000	93,000	129	64,000	+29,000
4.	<b>Gold Coast</b>	619,000	20,000	33	25,000	-5,000
5.	<b>Sunshine Coast</b>	339,000	11,000	36	10,000	+1,000

Source: MapInfo, Estimated Residential Population 2014, Australian Government Education & Training 2014



The Greater Moreton Bay Region needs its very own “Nerdistan,” like the Monash precinct in Clayton, Melbourne



Melbourne CBD  
20 km



## Monash, VIC

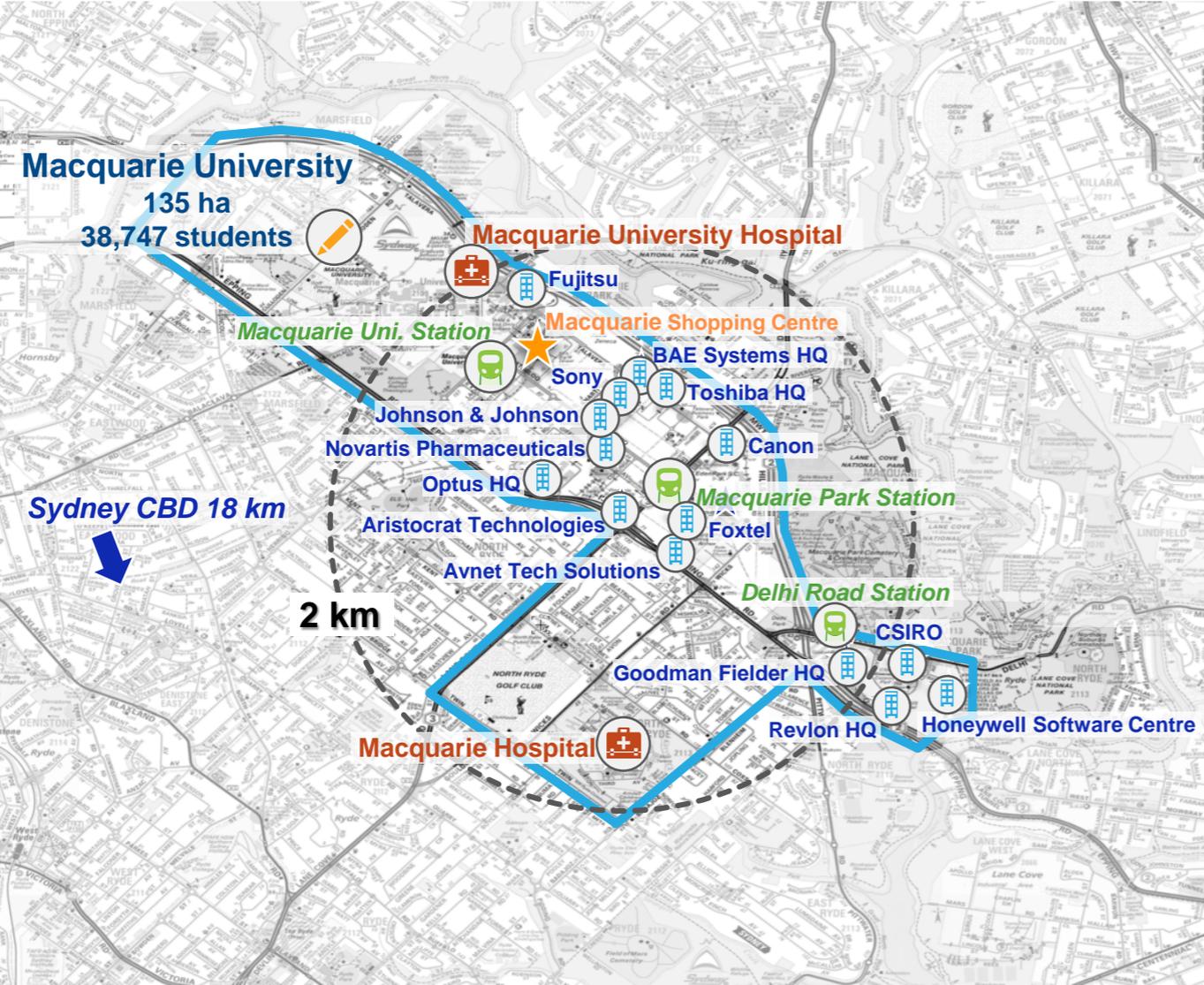
- ▶ Monash area: 14 sqkm
- ▶ Jobs **2011**: 82,000 **2006**: 73,000
- ▶ Monash University
- ▶ Monash Medical Centre
- ▶ Australian Synchrotron
- ▶ Business Park
- ▶ Residential/retail

Source: Melway 2014, Australian Bureau of Statistics 2006 and 2011

The blue boundary identifies the Statistical Area Level 2 geographic definition



# Sydney too has its very own "Geek Island"



## Macquarie, NSW

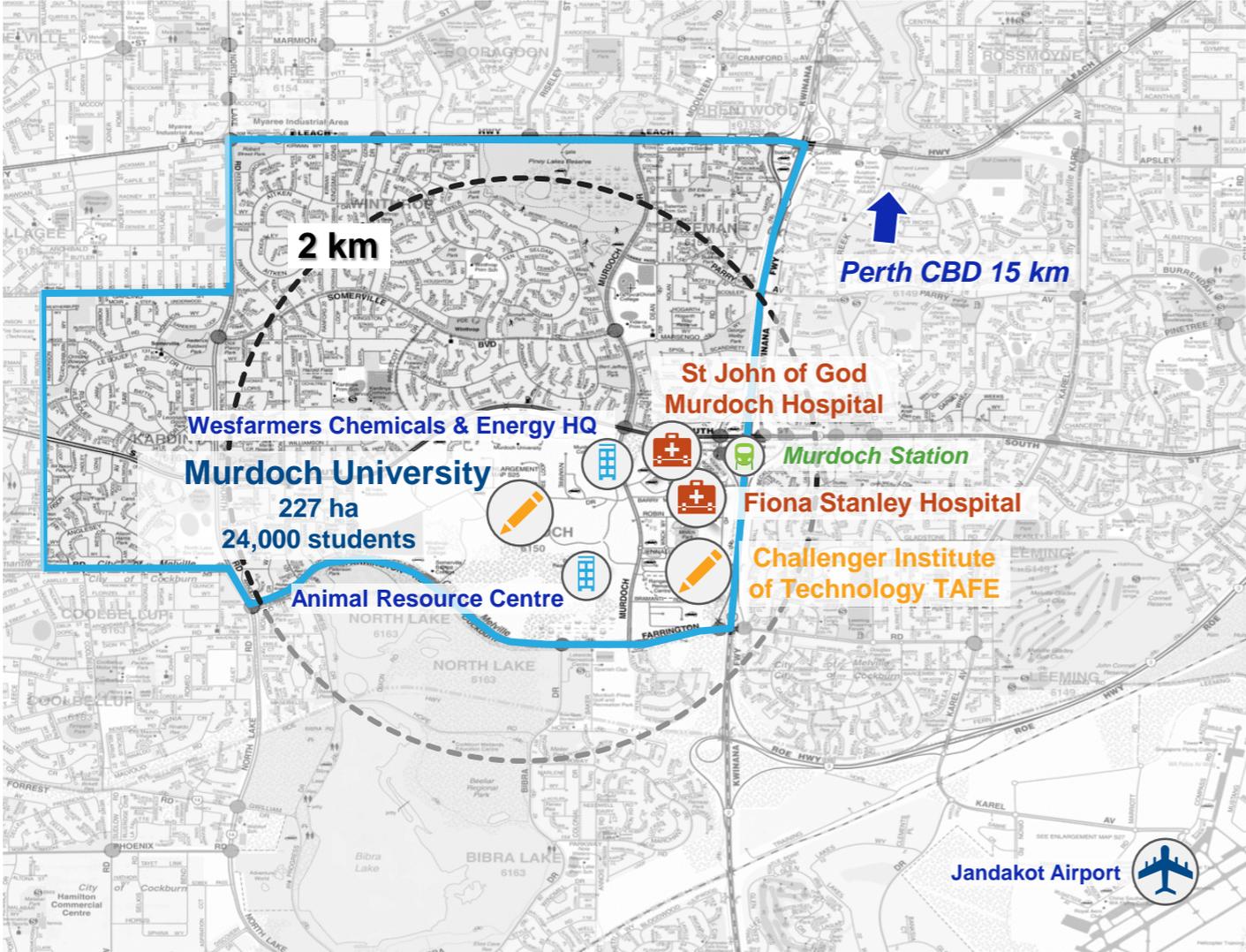
- ▶ Ryde area: 15 sqkm
- ▶ Jobs **2011**: 69,000 **2006**: 57,000
- ▶ Macquarie University
- ▶ Macquarie Hospital
- ▶ Macquarie Shopping Centre
- ▶ Foxtel
- ▶ CSIRO
- ▶ Residential
- ▶ Technology Park

Source: Melway 2014, Australian Bureau of Statistics 2006 and 2011

The blue boundary identifies the Statistical Area Level 2 geographic definition



# Even Perth has the makings of a suburban knowledge worker hotspot



**Murdoch, WA**

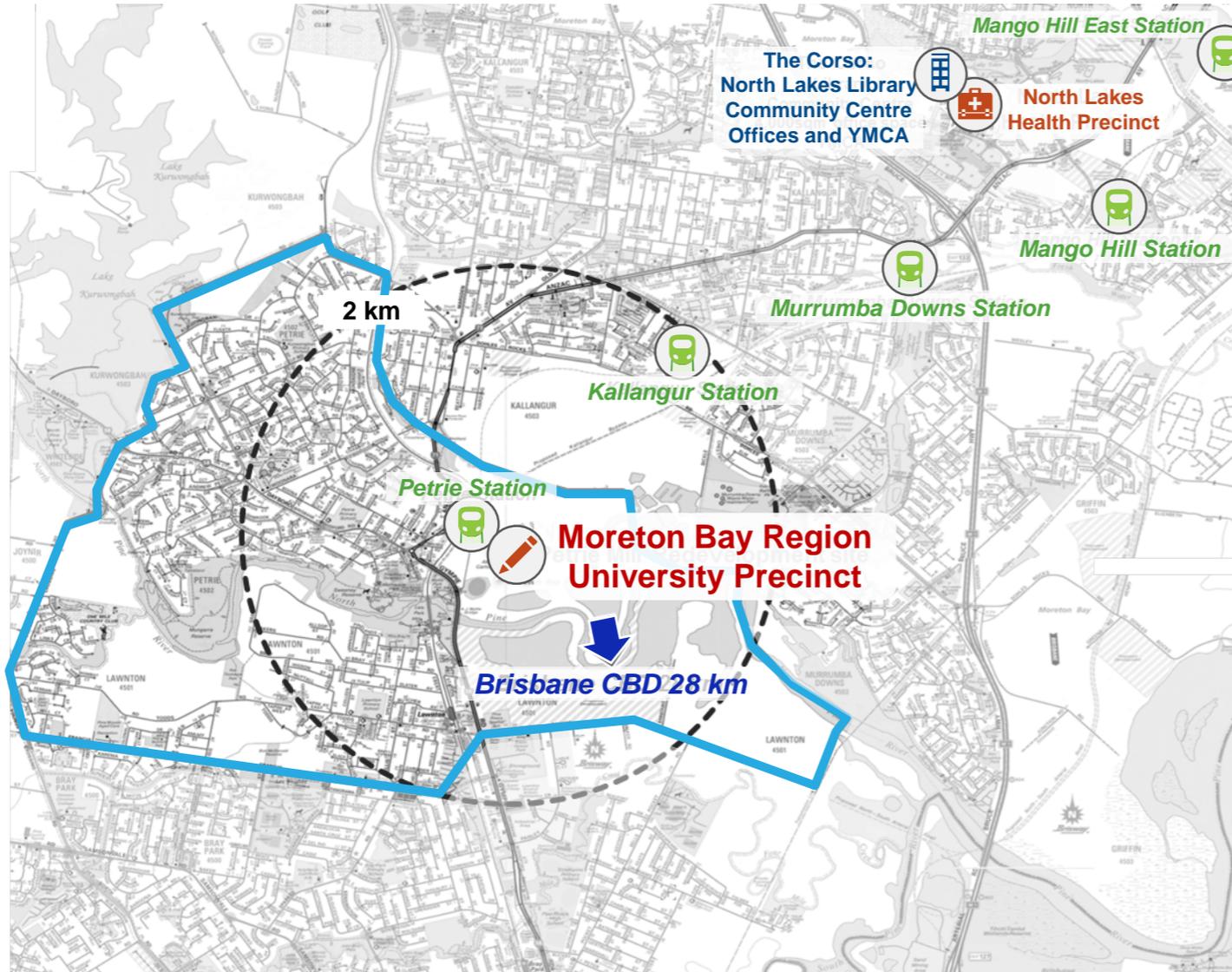
- ▶ Murdoch area: 14 sqkm
- ▶ Jobs **2011**: 8,000
- ▶ Murdoch University
- ▶ Fiona Stanley Hospital
- ▶ St John of God Hospital
- ▶ Residential
- ▶ Retail

Source: Melway 2014, Australian Bureau of Statistics 2006 and 2011

The blue boundary identifies the Statistical Area Level 2 geographic definition



# The MBRUP has all the attributes to be Brisbane's knowledge worker hotspot



## MBRUP, QLD

- ▶ Area: 16 sqkm
- ▶ Jobs **2011:** 4,000 **2006:** 4,000
- ▶ Proposed university
- ▶ Proposed hospital
- ▶ Proposed technology park
- ▶ Railway access

Source: Melway 2014, Australian Bureau of Statistics 2006 and 2011

The blue boundary identifies the Statistical Area Level 2 geographic definition

# The MBRUP has better transport than Monash



## A

### Transport at MBRUP

- ▶ Site 28 km north of Brisbane CBD
- ▶ Electrified rail link Nambour to Brisbane
- ▶ Access from Bruce Highway
- ▶ New spur line to Redcliffe under construction

Source: MapInfo Professional

# Half a million people are forecast to live within a 20-minute drive of the MBRUP in 2026

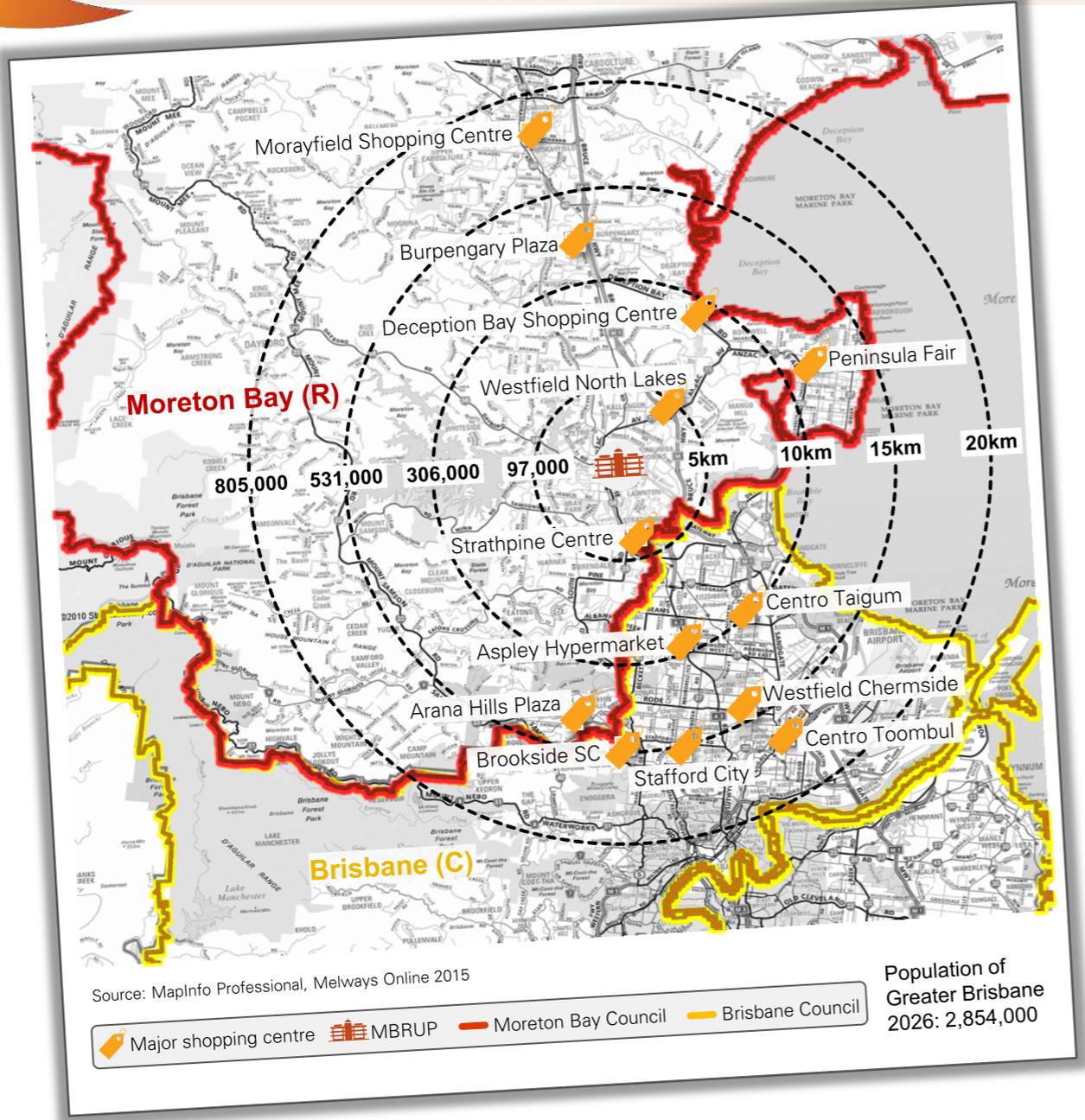


Radius	2014	2026	Growth 2014-2026	Cumulative 2026
0-5 km	76,000	97,000	21,000	97,000
5-10 km	165,000	209,000	44,000	306,000
10-15 km	192,000	225,000	33,000	531,000
15-20 km	234,000	274,000	40,000	805,000
20+ km Brisbane	1,608,000	2,049,000	441,000	2,854,000
Plus Sunshine Coast	339,000	440,000	101,000	3,294,000
<b>Total</b>	<b>2,614,000</b>	<b>3,294,000</b>	<b>680,000</b>	<b>-</b>

Source: MapInfo, based on data from the Australian Bureau of Statistics 2011



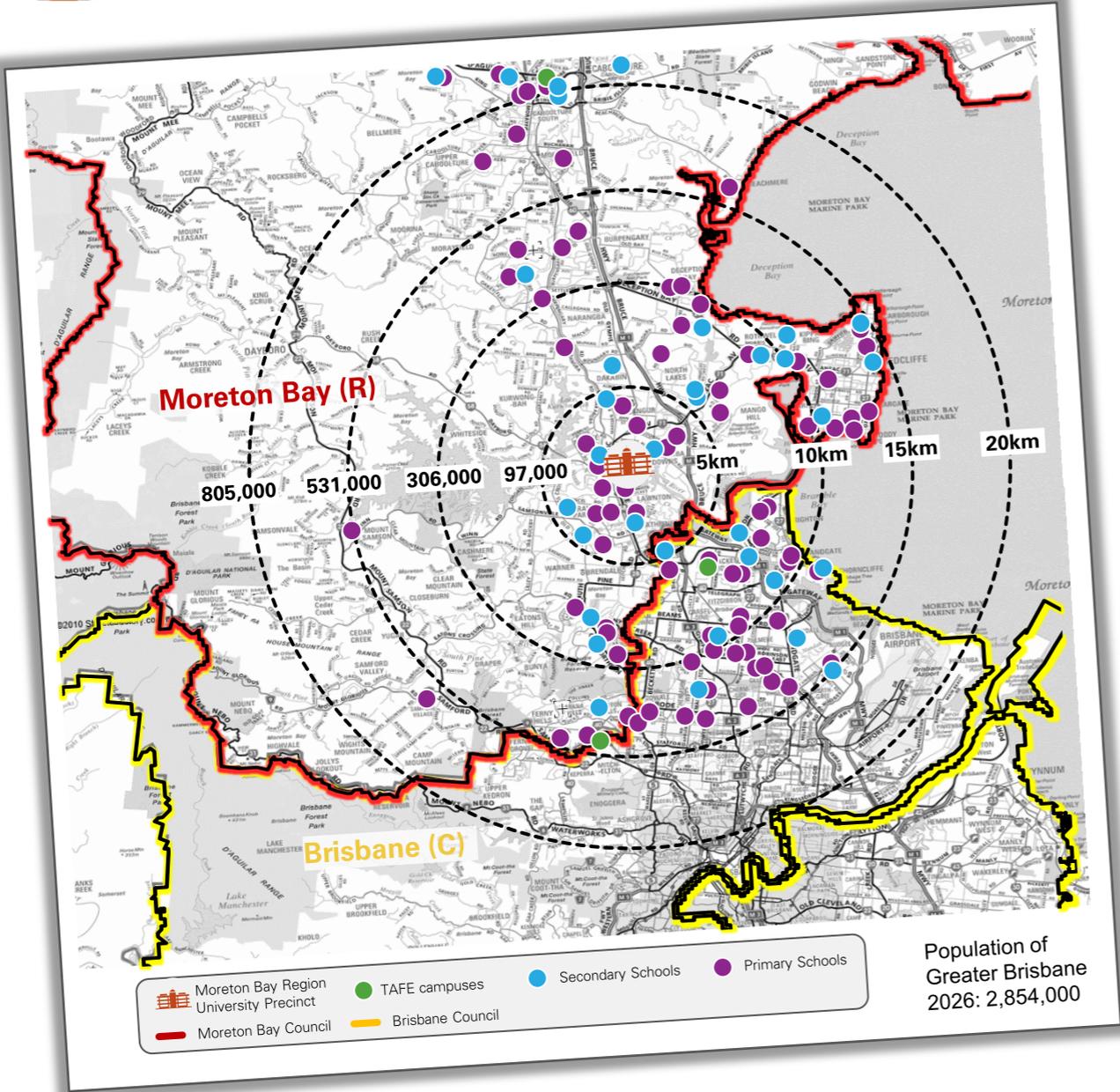
# Local businesses will benefit from the development of an activity hub



## Major Shopping Centres by km zone

<b>5km</b>	Strathpine Centre
<b>10km</b>	Westfield North Lakes Deception Bay Shopping Centre Aspley Hypermarket Centro Taigum
<b>15km</b>	Westfield Chermside Brookside Shopping Centre Arana Hills Plaza Peninsula Fair Kippa-Ring Burpengary Plaza
<b>20km</b>	Morayfield Shopping Centre Stafford City Centro Toombul

# Local high schools will have somewhere local to send kids



## Schools within 5km

- ▶ St Pauls Anglican School
- ▶ Pine Rivers High School
- ▶ Strathpine West Primary School
- ▶ Bray Park High School
- ▶ Holy Spirit Catholic Primary School
- ▶ Bray Park Primary School
- ▶ Lawnton Primary School
- ▶ Strathpine Primary School
- ▶ Pine Rivers Special School
- ▶ Petrie Primary School
- ▶ Mt Maria Catholic College
- ▶ Our Lady of The Way Primary School
- ▶ Kurwongbah Primary School
- ▶ Kallangur Primary School
- ▶ Dakabin Primary School
- ▶ Dakabin High School
- ▶ Living Faith Lutheran Primary School
- ▶ Undurba Primary School
- ▶ Murrumba Secondary College

Source: MapInfo Professional, Melways Online 2015

# Job creation and economic engine room



**10,000**

Uni students within 10 years

**\$950M**

ECONOMIC BENEFIT to the greater Moreton Bay Region



**30**



Minutes to Brisbane Airport



**615,000**

RESIDENTS in the Greater Moreton Bay Region in 2014

**CREATE OVER 2,200**

ONGOING JOBS for the Greater Moreton Bay Region by 2031



**250** ADDITIONAL ONGOING JOBS

in the local education and health sector from 2031



**812,000**

RESIDENTS in the Greater Moreton Bay Region in 2031



**100** DIRECT CONSTRUCTION JOBS

each year for (2016-30)



**5** REGIONAL SHOPPING CENTRES

(within 10kms of site)

**67,000**



18-24 YEAR OLDS IN the Greater Moreton Bay Region by 2031

### CONNECTIVITY



Bus



Rail



Active



Car



**Manufacturing % of workforce has declined postwar from 28% to 8%  
The professional & knowledge workforce has taken it's place from 12% to 27% (1954 to 2014)**

# The Greater Moreton Bay Region's University is the best location for a new University in Australia based on current demographics



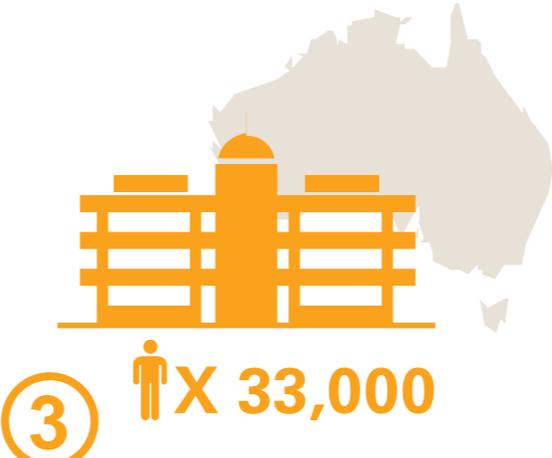
①

Australia, Brisbane and the Sunshine Coast will continue to **add population** over the next 20 years ... transportation infrastructure is being upgraded in the region



②

Australia is shifting to knowledge work requiring the workforce to **up-skill** through university and technical education



③  X 33,000

Australia has 40 universities with **1.3 million students** growing at 36,000 per year ... the average university has 33,000 students



④  X 6,000  
 X 613,000

There are 6,000 university places to service 613,000 residents on the Greater Moreton Bay Region... no other part of any major city in Australia is as **poorly served** by local universities



For too long Moreton has been overlooked...  
the time for a local University is now

5

The MBRUP is **centrally located** in the Greater Moreton Bay Region with rail and motorway access ... the proposal is to develop a university, hospital, technology park, residential and supporting infrastructure

6

There are **knowledge worker precincts** 20-25 km from the CBD in Sydney, Melbourne, Perth and Adelaide but not as yet in Brisbane

7

Clayton, Vic and Ryde, NSW precincts are anchored by university, medical and technology activities ... Moreton Bay Regional Council intends **competing for job opportunities** in this knowledge worker market

8

The Greater Moreton Bay Region currently generates 19,000 students locally with most (13,000) travelling in to CBD facilities ... a **"do nothing" option** condemns the next generation to limited job options

A decorative graphic in the top left corner of the slide, featuring overlapping curved shapes in shades of blue, orange, and green, with a series of small grey circles trailing off to the right.

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