Regional Profiles

Snapshots of Regional Activity and Forecasts for 2018-19
Regional Profiles

CSQ’s Regional Profiles monitor the pulse of the construction industry across Queensland. You will find a summary of our outlook for construction activity in each region, as well as key indicators around the health of the workforce and apprentices.

2018-19 in focus

The outlook for Queensland carries a predominantly positive tone but for different reasons across the state. In the North, regions have shaken-off the mining bust and are again looking for major civil projects to help fuel growth. While in the South-East corner, a similar story of a surging civil sector is due to cushion the winding down of the apartment boom.

The synchronisation of the Northern Queensland recovery and South-East apartment boom has inflated construction employment to its highest levels since the GFC. However, only the Far North and North West are expected to experience labour shortages over the near term. On aggregate, Queensland’s construction industry is equipped with a balanced labour force, sufficiently skilled to help meet anticipated infrastructure demand.

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Apprentice commencements per 100 workers

Construction Apprentice Training Rate
Apprentices in-training per 100 workers

Construction Workforce Outlook

Trade Availability

Source: NIEIR

NB: These figures reflect the overall balance of supply and demand for trades labour across all industries for 2019.

Regional Profile 2018-19

Construction activity is expected to sustain its recovery from previous year’s low levels, narrowing the labour surplus and enabling employers to refocus on the development of apprentices. Relatively less favourable conditions outside of the construction industry leaves the region with an unemployment rate above the state average and an abundant pool of skilled trade labour.

1.4%
expected annual population growth

237,000
population

7%
unemployment rate

9,900
employed in construction

580
construction apprentices

4%
of QLD construction apprentices are in the Central region

Construction Apprentice Intake Rate

Construction Apprentice Training Rate

Construction Workforce Outlook

Trade Availability

Source: NIEIR

Central

1.4% expected annual population growth

237,000 population

7% unemployment rate

9,900 employed in construction

580 construction apprentices

4% of QLD construction apprentices are in the Central region

Construction Apprentice Intake Rate

Construction Apprentice Training Rate

Construction Workforce Outlook

Trade Availability

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237,000 population

7% unemployment rate

9,900 employed in construction

580 construction apprentices

4% of QLD construction apprentices are in the Central region

Construction Apprentice Intake Rate

Construction Apprentice Training Rate

Construction Workforce Outlook

Trade Availability

Source: NIEIR

NB: These figures reflect the overall balance of supply and demand for trades labour across all industries for 2019.
Sectors in Focus for Central 2018-19

**Activity - Residential**

- 13% of overall activity in Central

**Activity - Commercial**

- 5% of overall activity in Central

**Activity - Engineering**

- 82% of overall activity in Central

- 4% of QLD construction businesses are located in this region

- 3,000 construction businesses

55% Sole traders
44% SMEs (1-20)
1% Large (over 20)
The second range crossing has provided the region a much needed sugar hit, keeping construction workers busy and expanding available apprenticeships. 2019 should see this project winding down and with no equivalent major projects on the immediate horizon, a labour surplus is expected to re-emerge upon its completion.

1.0% expected annual population growth
284,000 population
5% unemployment rate
12,300 employed in construction
1,000 construction apprentices
7% of QLD construction apprentices are in the Darling Downs-Toowoomba region

Construction Apprentice Intake Rate
Apprentice commencements per 100 workers

Construction Apprentice Training Rate
Apprentices in-training per 100 workers

Construction Workforce Outlook

Trade Availability

Source: NIEIR
NB: These figures reflect the overall balance of supply and demand for trades labour across all industries for 2019
Sectors in Focus for Darling Downs – Toowoomba 2018-19

Activity - Residential

RESIDENTIAL - 23% of overall activity in Darling Downs - Toowoomba

Activity - Commercial

COMMERCIAL - 16% of overall activity in Darling Downs - Toowoomba

Activity - Engineering

ENGINEERING - 61% of overall activity in Darling Downs - Toowoomba

6% of QLD construction businesses are located in this region

4,300 construction businesses

58% Sole traders
40% SMEs (1-20)
1% Large (over 20)

Source: NIEIR
Construction will be firing on all cylinders. Employment in the industry has recently jumped amidst the growing workload on offer, outpacing growth in apprenticeships. The pick-up in activity across all sectors leaves tradespeople in high demand and an expected labour shortage through the medium term.

**Far North**

- **1.3%** expected annual population growth
- **285,000** population
- **7%** unemployment rate
- **10,200** employed in construction
- **760** construction apprentices
- **5%** of QLD construction apprentices are in the Far North region

**Construction Apprentice Intake Rate**

**Apprentice commencements per 100 workers**

**Construction Apprentice Training Rate**

**Apprentices in-training per 100 workers**

**Construction Workforce Outlook**

Workers required

Workers available

**Trade Availability**

- South West
- Central
- Northern
- Wide Bay
- Mackay Whitsundays
- Greater Brisbane
- Gold Coast
- Darling Downs - Toowoomba
- Queensland
- Sunshine Coast
- North West

shortage

Balanced

Surplus

Source: NIEIR

NB: These figures reflect the overall balance of supply and demand for trades labour across all industries for 2019.
Sectors in Focus for Far North 2018-19

**Activity - Residential**
- $m
- Forecast

**Activity - Commercial**
- $m

**Activity - Engineering**
- $m

**RESIDENTIAL - 27%**
of overall activity in Far North

**COMMERCIAL - 9%**
of overall activity in Far North

**ENGINEERING - 64%**
of overall activity in Far North

6% of QLD construction businesses are located in this region

4,200 construction businesses

- 58% Sole traders
- 41% SMEs (1-20)
- 1% Large (over 20)

Source: NIEIR

RESIDENTIAL - 27% of overall activity in Far North

COMMERCIAL - 9% of overall activity in Far North

ENGINEERING - 64% of overall activity in Far North

6% of QLD construction businesses are located in this region

4,200 construction businesses

- 58% Sole traders
- 41% SMEs (1-20)
- 1% Large (over 20)

Source: NIEIR
Regional Profile 2018-19

Gold Coast

Apartment-mania recently swept through SEQ and now that we’ve found the ceiling, residential and commercial sectors will slowly contract. Engineering construction in the form of transport projects should be the next source of growth for the industry.

2.2% expected annual population growth

607,000 population

5% unemployment rate

37,800 employed in construction

2,500 construction apprentices

16% of QLD construction apprentices are in the Gold Coast region

Construction Apprentice Intake Rate
Apprentice commencements per 100 workers

Construction Apprentice Training Rate
Apprentices in-training per 100 workers

Construction Workforce Outlook

Trade Availability

Source: NCVER, ABS, CSQ

NB: These figures reflect the overall balance of supply and demand for trades labour across all industries for 2019
Sectors in Focus for Gold Coast 2018-19

Activity - Residential

RESIDENTIAL - 51% of overall activity in Gold Coast

Activity - Commercial

COMMERCIAL - 15% of overall activity in Gold Coast

Activity - Engineering

ENGINEERING - 34% of overall activity in Gold Coast

12,600 construction businesses

63% Sole traders
36% SMEs (1-20)
1% Large (over 20)

17% of QLD construction businesses are located in this region

63%
36%
1%
The state’s capital leads the way for other SEQ regions to follow. Strong population growth and low interest rates sparked the apartment boom. Now that commencements are slowing, civil and larger commercial projects are waiting in line to continue growth momentum. A healthy economy leaves the region with a balanced pool of labour to help support the growing region’s needs.

1.8% expected annual population growth

2,400,000 population

6% unemployment rate

117,000 employed in construction

7,000 construction apprentices

46% of QLD construction apprentices are in the Brisbane region

Construction Apprentice Intake Rate
Apprentice commencements per 100 workers

Construction Apprentice Training Rate
Apprentices in-training per 100 workers

Construction Workforce Outlook

Trade Availability

South West
Central
Northen
Wide Bay
Mackay Whitsundays
Greater Brisbane
Gold Coast
Darling Downs - Toowoomba
Queensland
Sunshine Coast
North West
Far North

Source: NIEIR

NB: These figures reflect the overall balance of supply and demand for trades labour across all industries for 2019.
Sectors in Focus for Greater Brisbane 2018-19

**Activity - Residential**

RESIDENTIAL - 44%

of overall activity in Greater Brisbane

**Activity - Commercial**

COMMERCIAL - 17%

of overall activity in Greater Brisbane

**Activity - Engineering**

ENGINEERING - 39%

of overall activity in Greater Brisbane

45%

of QLD construction businesses are located in this region

33,600 construction businesses

- 60% Sole traders
- 39% SMEs (1-20)
- 1% Large (over 20)
Mackay’s economic outlook has been meagre for many years since the mining bust. We can put that pessimism behind us now as Mackay boasts the lowest unemployment rate in Queensland. The ongoing recovery is anticipated to be experienced across all sectors over the medium term, which will be met by a healthy surplus of workers ready to take up tools.

1.5% expected annual population growth

173,000 population

4% unemployment rate

8,000 employed in construction

520 construction apprentices

3% of QLD construction apprentices are in the Mackay Whitsundays region

**Construction Apprentice Intake Rate**

**Apprentice commencements per 100 workers**

**Construction Apprentice Training Rate**

**Apprentices in-training per 100 workers**

Mackay Whitsundays

**Construction Workforce Outlook**

**Trade Availability**

Source: NIEIR

NB: These figures reflect the overall balance of supply and demand for trades labour across all industries for 2019
Sectors in Focus for Mackay Whitsundays 2018-19

Activity - Residential

$\text{b}

0.0
0.2
0.4
0.6
0.8
1.0
1.2

Source: NIEIR

RESIDENTIAL - 18% of overall activity in Mackay Whitsundays

Activity - Commercial

$\text{b}

0.0
0.1
0.2
0.3
0.4
0.5
0.6
0.7

Source: NIEIR

COMMERCIAL - 6% of overall activity in Mackay Whitsundays

Activity - Engineering

$\text{b}

0.0
0.5
1.0
1.5
2.0
2.5
3.0
3.5
4.0

Source: NIEIR

ENGINEERING - 76% of overall activity in Mackay Whitsundays

2,300 construction businesses

53% Sole traders
45% SMEs (1-20)
2% Large (over 20)

3% of QLD construction businesses are located in this region
Construction activity in the region has been a roller coaster ride driven by the ebb and flow of major civil projects over the past decade. North West's book of work is expected to rise again through 2018-19 alongside its neighbouring regions, bringing with it a labour shortage within the industry over the medium term.

0.6% expected annual population growth
30,200 population
1,000 employed in construction
90 construction apprentices
11% unemployment rate
0.6% of QLD construction apprentices are in the North West region

Construction Apprentice Intake Rate
Apprentice commencements per 100 workers

Construction Apprentice Training Rate
Apprentices in-training per 100 workers

Construction Workforce Outlook

Trade Availability

Source: NIEIR
NB: These figures reflect the overall balance of supply and demand for trades labour across all industries for 2019
Caution should be exercised when interpreting trends for this region. Statistics for lightly-populated regions often fluctuate randomly and dramatically from one year to the next, as small changes in numbers can result in large percentage changes.
Moderate growth across all sectors paints a rosy picture for the region’s construction industry during 2018-19. This recovery is expected to be fulfilled by an ample pool of labour through the medium term.

### Northern

#### Regional Profile 2018-19

- **1.6%** expected annual population growth
- **236,000** population
- **8%** unemployment rate
- **9,700** employed in construction
- **610** construction apprentices
- **4%** of QLD construction apprentices are in the Northern region

#### Construction Apprentice Intake Rate

Apprentice commencements per 100 workers

#### Construction Apprentice Training Rate

Apprentices in-training per 100 workers

#### Construction Workforce Outlook

#### Trade Availability

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Source: NIEIR

NB: These figures reflect the overall balance of supply and demand for trades labour across all industries for 2019.
Sectors in Focus for Northern 2018-19

**Activity - Residential**

- Forecast
- Source: NIEIR
- Residential - 27% of overall activity in Northern

**Activity - Commercial**

- Forecast
- Source: NIEIR
- Commercial - 18% of overall activity in Northern

**Activity - Engineering**

- Forecast
- Source: NIEIR
- Engineering - 55% of overall activity in Northern

- 4% of QLD construction businesses are located in this region

- 2,900 construction businesses

- 53% Sole traders
- 46% SMEs (1-20)
- 2% Large (over 20)
With the smallest population in Queensland and minimal projects scheduled, there isn’t much construction activity forecast for the region. Leaving the handful of local workers with little to do and a persistent surplus of labour.

-0.5% expected annual population growth
7,100 population
190 employed in construction
20 construction apprentices
8% unemployment rate
0.1% of QLD construction apprentices are in the South West region

With the smallest population in Queensland and minimal projects scheduled, there isn’t much construction activity forecast for the region. Leaving the handful of local workers with little to do and a persistent surplus of labour.
Sectors in Focus for South West 2018-19

Activity - Residential

Source: NIEIR

Activity - Commercial

Source: NIEIR

Activity - Engineering

Source: NIEIR

Caution should be exercised when interpreting trends for this region. Statistics for lightly-populated regions often fluctuate randomly and dramatically from one year to the next, as small changes in numbers can result in large percentage changes.
Construction activity is expected to continue experiencing modest growth against the backdrop of a solid economy. Like other SEQ regions, the baton is expected to be passed to the civil sector as the next source of growth. Tradespeople in the region are forecast to be the busiest in SEQ but the large pool of available skilled labour should sufficiently meet the growing demand.

**2.0%**
expected annual population growth

**366,000**
population

**23,900**
employed in construction

**1,400**
construction apprentices

**5%**
unemployment rate

**9%**
of QLD construction apprentices are in the Sunshine Coast region

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**Construction Apprentice Intake Rate**
*Apprentice commencements per 100 workers*

**Construction Apprentice Training Rate**
*Apprentices in-training per 100 workers*

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**Construction Workforce Outlook**

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**Trade Availability**

NB: These figures reflect the overall balance of supply and demand for trades labour across all industries for 2019.
Sectors in Focus for Sunshine Coast 2018-19

RESIDENTIAL - 52%
of overall activity in Sunshine Coast

COMMERCIAL - 12%
of overall activity in Sunshine Coast

ENGINEERING - 36%
of overall activity in Sunshine Coast

10% of QLD construction businesses are located in this region

7,800 construction businesses

- 60% Sole traders
- 39% SMEs (1-20)
- 1% Large (over 20)

RESIDENTIAL - 52% of overall activity in Sunshine Coast

COMMERCIAL - 12% of overall activity in Sunshine Coast

ENGINEERING - 36% of overall activity in Sunshine Coast

10% of QLD construction businesses are located in this region

7,800 construction businesses

- 60% Sole traders
- 39% SMEs (1-20)
- 1% Large (over 20)
Construction activity in the region is expected to marginally grow throughout the medium term. This growth is anticipated to stem from the growing book of work in the currently small civil sector of the region. With economic growth hard to find in the region and a relatively high unemployment rate, the available pool of labour is expected to remain in surplus over the medium term.

1.1% expected annual population growth

295,000 population

9% unemployment rate

8,500 employed in construction

640 construction apprentices

4% of QLD construction apprentices are in the Wide Bay region

Construction Apprentice Intake Rate

Apprentice commencements per 100 workers

Source: NCVER, ABS, CSQ

Construction Apprentice Training Rate

Apprentices in-training per 100 workers

Source: NCVER, ABS, CSQ

Construction Workforce Outlook

Source: NIEIR

Trade Availability

Source: NIEIR

NB: These figures reflect the overall balance of supply and demand for trades labour across all industries for 2019.
Sectors in Focus for Wide Bay 2018-19

**Activity - Residential**

- **Forecast**

  - Forecasted range from 2008 to 2022

  - Source: NIEIR

**Activity - Commercial**

- **Forecast**

  - Forecasted range from 2008 to 2022

  - Source: NIEIR

**Activity - Engineering**

- **Forecast**

  - Forecasted range from 2008 to 2022

  - Source: NIEIR

**RESIDENTIAL - 61%**

- of overall activity in Wide Bay

**COMMERCIAL - 18%**

- of overall activity in Wide Bay

**ENGINEERING - 21%**

- of overall activity in Wide Bay

**5%**

- of QLD construction businesses are located in this region

**3,500**

- construction businesses

- 57% Sole traders

- 42% SMEs (1-20)

- 1% Large (over 20)
Want more great insights from CSQ?

VISIT OUR KNOWLEDGE CENTRE FOR THE TOOLS TO BUILD YOUR BUSINESS

**Annual Training Plan 2018-19**
- details CSQ’s funding priorities for skills investment and service delivery for 2018-19.
- produced following extensive consultation with industry, government and other stakeholders.

**Industry Outlook 2018-19**
- underpins the Annual Training Plan by providing data and evidence.
- includes assessment of the prospects for key construction sectors and the pipeline of workers needed for the future.

**Women in Construction report 2018**
- details CSQ’s findings into women in the construction industry.
- includes an assessment of the current issues and how we can work towards changing these issues as an industry in the years to come.

**Aboriginal and Torres Strait Islander People in Queensland’s Construction Industry report**
- report on participation levels, apprenticeship completion rates, current issues and how industry can work towards further improvements.
