Regional Profiles

Snapshots of Regional Activity and Forecasts for 2019-20
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.

2019-20 in focus

2019-20 is the year the baton is passed from residential to the engineering construction sector in Queensland. Major public infrastructure spending will dominate the growth story in SEQ. Looking further north, regional Queensland has finally shaken-off the mining bust and is enjoying the first period of sustained growth in several years.

The synchronisation of the north’s recovery and the south-east’s residential boom has inflated construction employment to its highest levels since the GFC. Several regions will experience labour shortages over the near term, but overall Queensland’s construction industry is equipped with a balanced and skilled labour force.

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Regional Profile 2019-20

Construction activity is expected to sustain its recovery from previous year’s low levels and a shortage of trade labour is likely to develop. Now is the time for employers to refocus on developing the apprentice pipeline. The region is now creating more jobs than it is losing, bringing the overall unemployment rate into line with the state average.

- **0.9%** expected annual population growth
- **236,000** population
- **10,400** employed in construction
- **500** construction apprentices
- **6%** unemployment rate
- **3%** of QLD construction apprentices are in the Central 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**

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

Source: NIEIR

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 Central 2019-20

Activity - Residential

RESIDENTIAL - 15% of overall activity in Central

Activity - Commercial

COMMERCIAL - 7% of overall activity in Central

Activity - Engineering

ENGINEERING - 84% of overall activity in Central

2,900 construction businesses

- 55% Sole traders
- 44% SMEs (1-20)
- 1% Large (over 20)

4% of QLD construction businesses are located in this region

Source: NIEIR
The flurry of large commercial projects around Toowoomba of recent years is now receding and a trade labour surplus is expected to open-up over the coming years. This will be offset by a number of workers choosing to leave the region in search of opportunities elsewhere, which will keep the headline unemployment rate low.

**Regional Profile 2019-20**

**Darling Downs - Toowoomba**

0.7% expected annual population growth

286,000 population

6% unemployment rate

14,300 employed in construction

1,000 construction apprentices

6% 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 2019-20

**Activity - Residential**

- **Sources**: NIEIR

**Activity - Commercial**

- **Sources**: NIEIR

**Activity - Engineering**

- **Sources**: NIEIR

**Residential** - 19% of overall activity in Darling Downs - Toowoomba

**Commercial** - 10% of overall activity in Darling Downs - Toowoomba

**Engineering** - 72% of overall activity in Darling Downs - Toowoomba

6% of QLD construction businesses are located in this region

4,400 construction businesses

- 58% Sole traders
- 41% SMEs (1-20)
- 1% Large (over 20)
Regional Profile 2019-20

Far North

In 2019-20, construction will be firing on all three cylinders - residential, commercial and engineering. Employment growth in and around Cairns has surged over the last 12 months, pulling many workers back into the region. This will soak up the region’s trade labour shortages over the coming years.

**1.2%**
expected annual population growth

**287,000**
population

**10,700**
employed in construction

**800**
construction apprentices

**7%**
unemployment rate

**5%**
of QLD construction apprentices are in the Far North region

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

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

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**Construction Workforce Outlook**

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**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 Far North 2019-20

Activity - Residential

RESIDENTIAL - 33% of overall activity in Far North

Activity - Commercial

COMMERCIAL - 12% of overall activity in Far North

Activity - Engineering

ENGINEERING - 66% of overall activity in Far North

6% of QLD construction businesses are located in this region

4,200 construction businesses

- 57% Sole traders
- 42% SMEs (1-20)
- 1% Large (over 20)

Source: NIEIR
The residential building boom that gripped the Gold Coast construction industry in recent years is now receding. With the Comm Games now well behind us, there are also fewer major engineering projects in the pipeline. The commercial sector will show some growth during what will be an otherwise flat year ahead for construction workers.

**Gold Coast**

**Regional Profile 2019-20**

The residential building boom that gripped the Gold Coast construction industry in recent years is now receding. With the Comm Games now well behind us, there are also fewer major engineering projects in the pipeline. The commercial sector will show some growth during what will be an otherwise flat year ahead for construction workers.

**Construction Apprentice Intake Rate**

Apprentice commencements per 100 workers

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Source: NCVER, ABS, CSQ

**Construction Apprentice Training Rate**

Apprentices in-training per 100 workers

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</table>

Source: NCVER, ABS, CSQ

**Construction Workforce Outlook**

Workers required (grey) vs Workers available (orange)

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<tr>
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Source: NIEIR

**Trade Availability**

<table>
<thead>
<tr>
<th>Region</th>
<th>2019-20</th>
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<tbody>
<tr>
<td>South West</td>
<td>Surplus</td>
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<tr>
<td>Central</td>
<td>Balanced</td>
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<tr>
<td>North</td>
<td>Surplus</td>
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<tr>
<td>Wide Bay</td>
<td>Balanced</td>
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<tr>
<td>Mackay Whitsundays</td>
<td>Balanced</td>
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<tr>
<td>Greater Brisbane</td>
<td>Balanced</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>Balanced</td>
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<tr>
<td>Darling Downs - Toowoomba</td>
<td>Balanced</td>
</tr>
<tr>
<td>Queensland</td>
<td>Balanced</td>
</tr>
<tr>
<td>Sunshine Coast</td>
<td>Balanced</td>
</tr>
<tr>
<td>North West</td>
<td>Balanced</td>
</tr>
<tr>
<td>Far North</td>
<td>Balanced</td>
</tr>
</tbody>
</table>

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 Gold Coast 2019-20

**Activity - Residential**

RESIDENTIAL - 51% of overall activity in Gold Coast

**Activity - Commercial**

COMMERCIAL - 15% of overall activity in Gold Coast

Activity - Residential

RESIDENTIAL - 51% of overall activity in Gold Coast

**Activity - Engineering**

ENGINEERING - 34% of overall activity in Gold Coast

17% of QLD construction businesses are located in this region

12,600 construction businesses

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

Source: NIEIR
The residential building boom that gripped Brisbane in recent years has receded and will find its floor in 2019-20. But there will be no new boom, with the emphasis shifting to public infrastructure and large commercial projects such as Queens Wharf. Expect a flat year ahead for construction workers in the capital.

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**

Workers required

Workers available

**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 Greater Brisbane 2019-20

Activity - Residential

$\text{b}$

Forecast

Source: NIEIR

RESIDENTIAL - 44% of overall activity in Greater Brisbane

Activity - Commercial

$\text{b}$

Forecast

Source: NIEIR

COMMERCIAL - 17% of overall activity in Greater Brisbane

Activity - Engineering

$\text{b}$

Forecast

Source: NIEIR

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)

RESIDENTIAL - 44% of overall activity in Greater Brisbane

COMMERCIAL - 17% of overall activity in Greater Brisbane

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)
Signs of life have been returning to the region’s construction industry and we expect solid growth to materialise in 2019-20. With building approvals creeping up, and significant mining and infrastructure announcements being made, the market for construction workers across will begin to tighten across all sectors.

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

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 2019-20

Activity - Residential

$\text{b}$

Source: NIEIR

- RESIDENTIAL - 18% of overall activity in Mackay Whitsundays

Activity - Commercial

$\text{b}$

Source: NIEIR

- COMMERCIAL - 6% of overall activity in Mackay Whitsundays

Activity - Engineering

$\text{b}$

Source: NIEIR

- ENGINEERING - 76% of overall activity in Mackay Whitsundays

- 3% of QLD construction businesses are located in this region

- 2,300 construction businesses
  - 53% Sole traders
  - 45% SMEs (1-20)
  - 2% Large (over 20)
The sparsely populated north-west region of the state is subject to notoriously lumpy construction investments. 2019-20 is expected to see a rising book of work for the North West construction industry, bringing with it a shortage of trade labour over the year.

**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
Sectors in Focus for North West 2019-20

Activity - Residential

RESIDENTIAL - 3% of overall activity in North West

Activity - Commercial

COMMERCIAL - 3% of overall activity in North West

Activity - Engineering

ENGINEERING - 94% of overall activity in North West

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.

0.4% of QLD construction businesses are located in this region

290 construction businesses

- 49% Sole traders
- 47% SMEs (1-20)
- 4% Large (over 20)
The last 12 months saw the region turn the page on what has been a particularly punishing period for the region’s construction industry. Solid growth will materialise in 2019-20 across the residential and commercial sectors, and we see a high probability of better-than-expected growth in engineering works on the back of public infrastructure spending.

1.6% expected annual population growth

236,000 population

9,700 employed in construction

610 construction apprentices

8% unemployment rate

4% of QLD construction apprentices are in the Northern region

The last 12 months saw the region turn the page on what has been a particularly punishing period for the region’s construction industry. Solid growth will materialise in 2019-20 across the residential and commercial sectors, and we see a high probability of better-than-expected growth in engineering works on the back of public infrastructure spending.

1.6% expected annual population growth

236,000 population

9,700 employed in construction

610 construction apprentices

8% unemployment rate

4% of QLD construction apprentices are in the Northern region
Sectors in Focus for Northern 2019-20

**Activity - Residential**

- Source: NIEIR

**Activity - Commercial**

- Source: NIEIR

**Activity - Engineering**

- Source: NIEIR

**RESIDENTIAL** - 27% of overall activity in Northern

**COMMERCIAL** - 18% of overall activity in Northern

**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)
Regional Profile 2019-20

South West

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

8% unemployment rate

190 employed in construction

20 construction apprentices

0.1% of QLD construction apprentices are in the South 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, ABS, CSQ

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 South West 2019-20**

**Activity - Residential**

- Source: NIEIR

**Activity - Commercial**

- Source: NIEIR

**Activity - Engineering**

- Source: NIEIR

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**RESIDENTIAL** - 12% of overall activity in South West

**COMMERCIAL** - 8% of overall activity in South West

**ENGINEERING** - 80% of overall activity in South West

**0.2%** of QLD construction businesses are located in this region

**120 construction businesses**

- 68% Sole traders
- 32% SMEs (1-20)
- 0% Large (over 20)

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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.

21
After several years of strong growth, residential construction activity is expected to plateau in 2019-20. Like other SEQ regions, the baton is expected to be passed to the civil sector as the next source of growth. The region’s tradespeople are some of the busiest in Queensland, but solid migration into the region ensures a sufficient supply of skilled labour.

2.0% expected annual population growth

366,000 population

5% unemployment rate

23,900 employed in construction

1,400 construction apprentices

9% of QLD construction apprentices are in the Sunshine Coast 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

Workers required

Workers available

Sunshine Coast

2.0%

366,000

5%

23,900

1,400

9%

Regional Profile 2019-20

Sunshine Coast

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 Sunshine Coast 2019-20

Activity - Residential

RESIDENTIAL - 52% of overall activity in Sunshine Coast

Activity - Commercial

COMMERCIAL - 12% of overall activity in Sunshine Coast

Activity - Engineering

ENGINEERING - 36% of overall activity in Sunshine Coast

7,800 construction businesses

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

10% of QLD construction businesses are located in this region

7,800 construction businesses
They say slow and steady wins the race. Construction activity in the region is expected to continue at a modest clip, driven by a mix of residential and engineering work. The region suffers one of the highest unemployment rates in the state, thanks to a combination of zero jobs growth and a sticky labour force.

**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

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**Construction Apprentice Intake Rate**

*Apprentice commencements per 100 workers*

**Construction Apprentice Training Rate**

*Apprentices in-training per 100 workers*

**Construction Workforce Outlook**

**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 Wide Bay 2019-20

Activity - Residential

$\text{m}$

- FORECAST


RESIDENTIAL - 61% of overall activity in Wide Bay

Activity - Commercial

$\text{m}$

- FORECAST


COMMERCIAL - 18% of overall activity in Wide Bay

Activity - Engineering

$\text{m}$

- FORECAST


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)
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.

csq.org.au/knowledgecentre
How to get involved

Visit: csq.org.au
Call: 1800 798 488