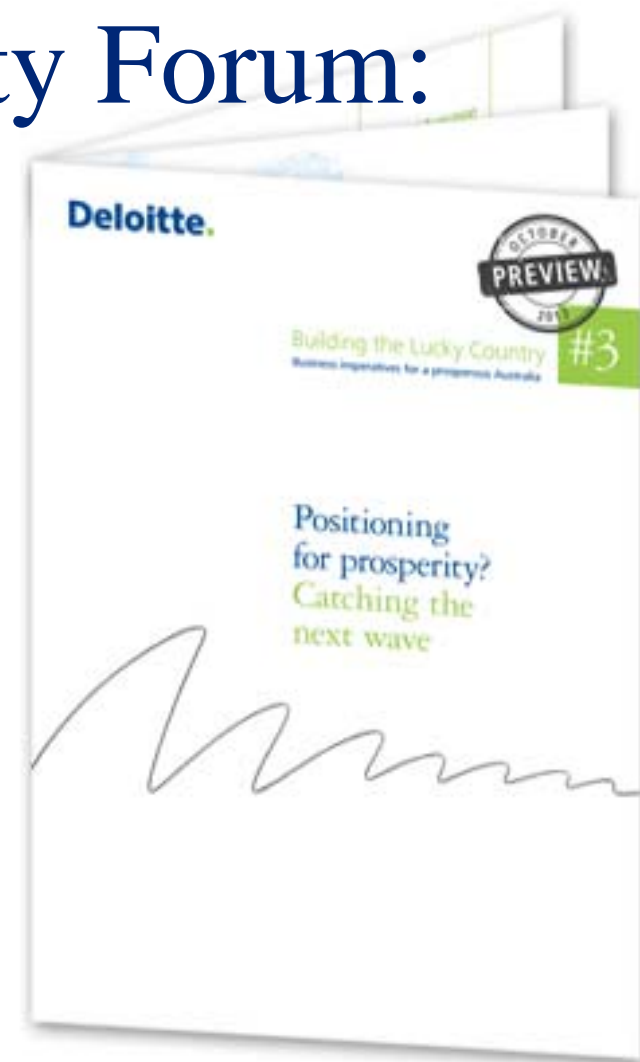




Sunshine Coast Youth Prosperity Forum:

Building the Lucky Country #3

Positioning for prosperity?
Catching the next wave



What the world wants

Our forecasts draw on:

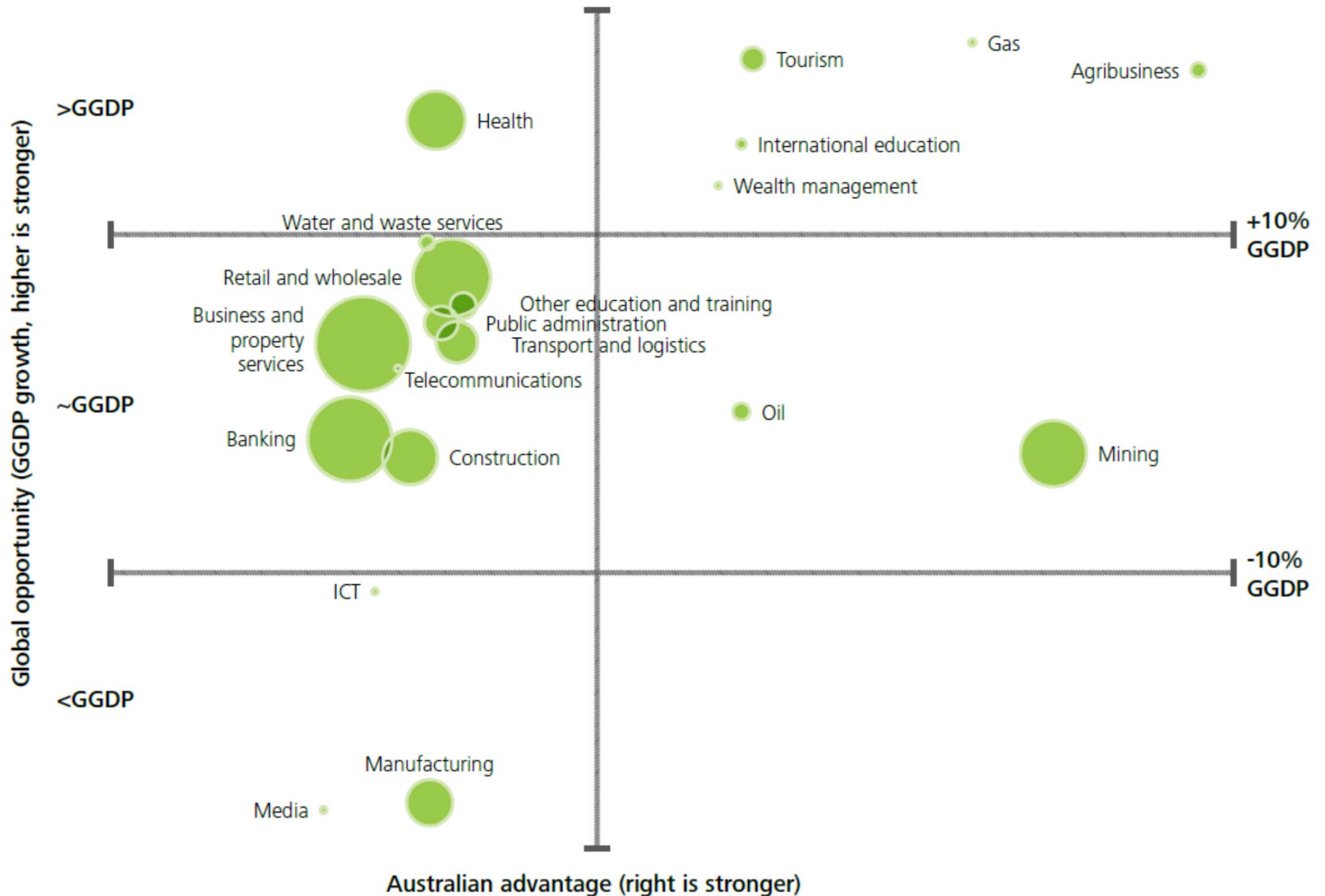
- **Global growth**
- **Urbanisation**
- **The rise of the middle class**
- **Environmental concerns**
- **Population ageing.**

What the world wants

Asia's boom is maturing – Australia's will follow suit:

- **Asia's middle classes will boost their protein intake.**
- **Polluted cities to our north drive demand for clean air.**
- **Asia will want to travel, and be better educated.**
- **Asia isn't just getting richer – it is also getting older, so the demand for wealth management will leap.**

The prosperity map



The fantastic five

These five have the magic mix: global growth will be on their side, and Australia has great potential to meet that.

● Tourism

● Gas

Agribusiness ●

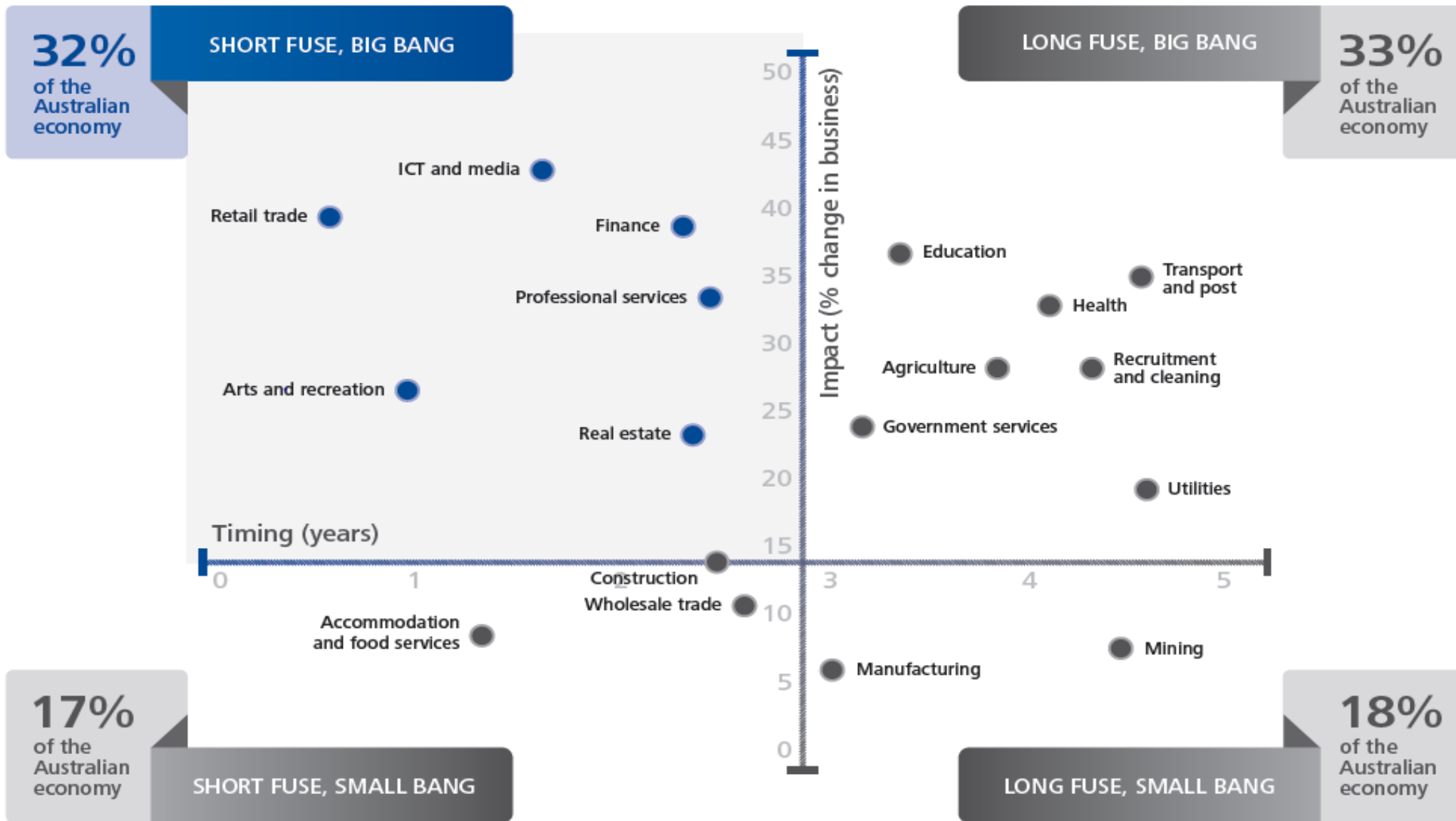
● International education

● Wealth management

Bringing home the bacon

- **The Lucky Country's luck hasn't run out.**
- **Our luck is changing, as Asia's boom is changing:**
 - That underscores the need to keep momentum in mining.
 - And it raises the importance of clearing roadblocks to growth not merely in the 'fantastic five', but across the economy.
- **And it also has major implications for each business:**
 - Your sectoral opportunities are on the march.

Digital disruption is also dramatically changing the way business operates



The Sunshine Coast

Sunshine Coast – employment trends

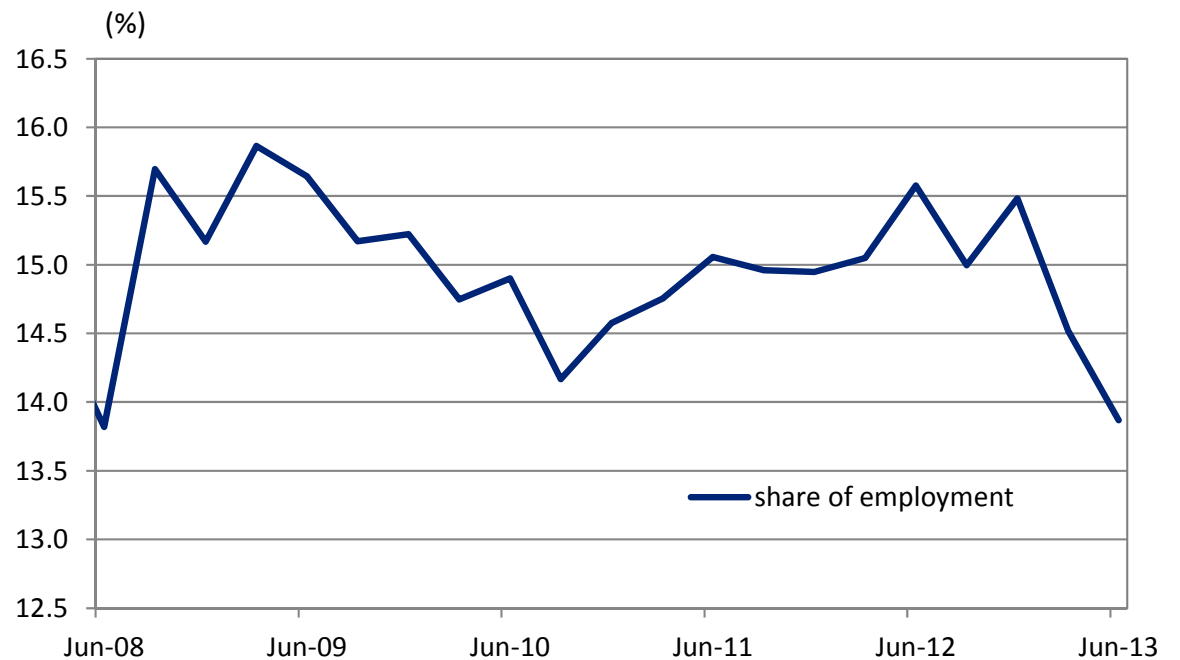
The Sunshine Coast had a population of around 324,300 and a workforce of 150,200 as at June 2012.

Its workforce is older than the national average, which may place constraints on future labour force participation.

In recent years employment growth in Queensland as a whole has outpaced that in the Sunshine Coast causing the regions share of State employment to fall. The region is also subject to seasonal fluctuations in labour demand.

The region's unemployment rate is relatively high, at 6.1%. This rate fell through the 2000's boom, but has increased since the GFC.

Sunshine Coast share of State employment



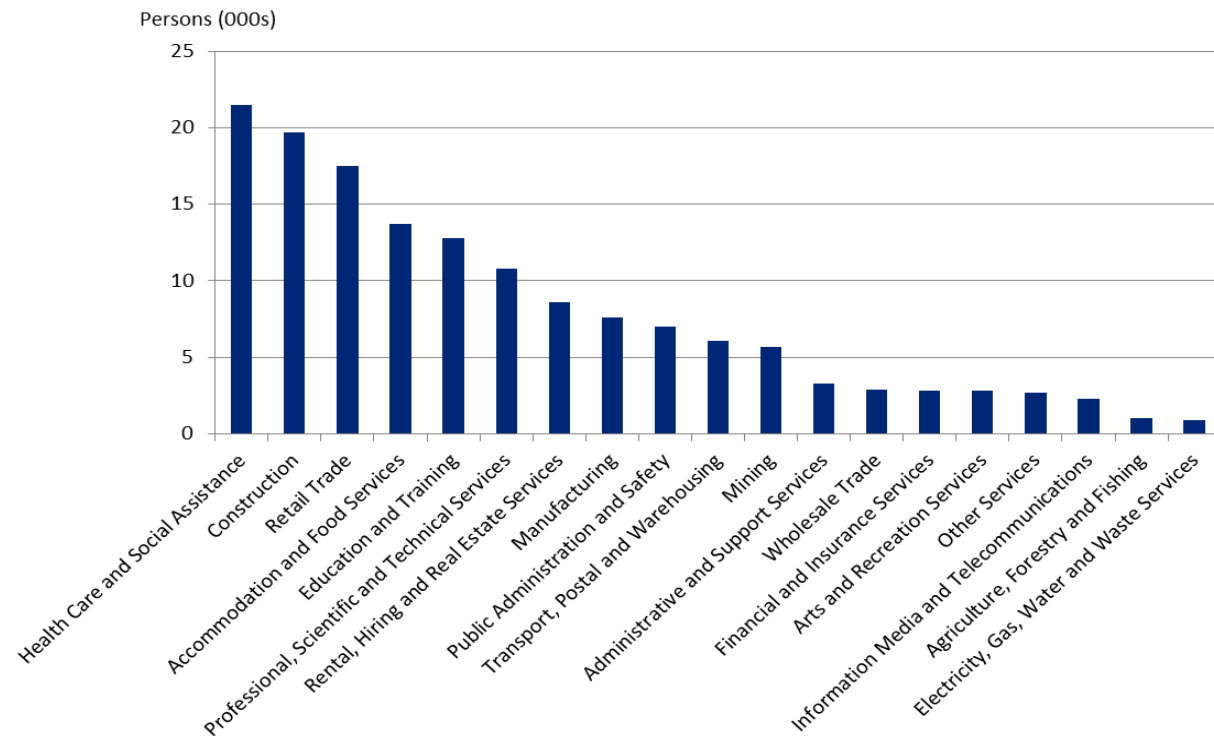
Sunshine Coast – employment structure

At present the largest employing industries in the region are health care, construction and retail trade.

Tourism is a significant economic driver. Its activities take place across a range of industries (though if they were aggregated it would form the fourth largest industry in the region).

2011 Census data showed that, compared with State averages, the Sunshine Coast is strong in real estate, accommodation and food services, and construction. It is weak in agriculture, transport, public administration and mining (though the latter has grown strongly since).

Sunshine Coast employment structure



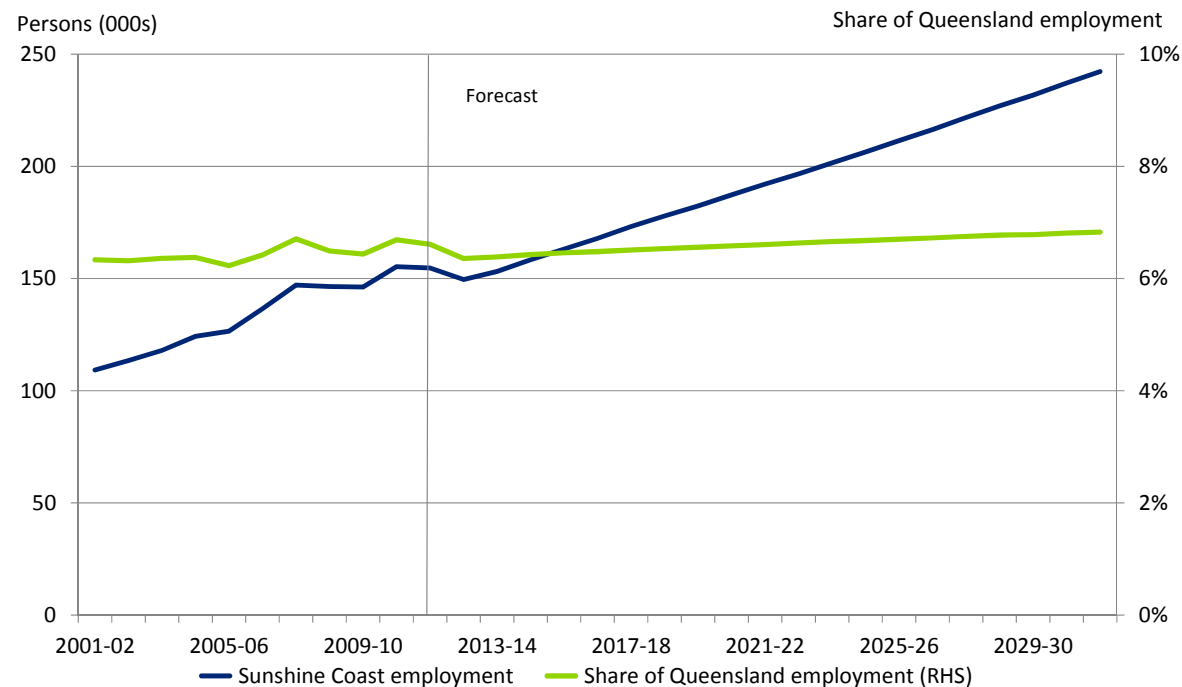
Sunshine Coast – future employment growth

Total employment in the Sunshine Coast is expected to increase from 150,200 people in 2012-13 to 246,000 people in 2031-32.

That represents average growth of 2.6% per annum – a little faster than State-wide growth. As a result, the region's share of State employment is expected to lift.

A continued inflow of residents acts to counter-balance the ageing effect as existing residents increasingly move into age cohorts where their labour force participation is lower.

Sunshine Coast employment growth



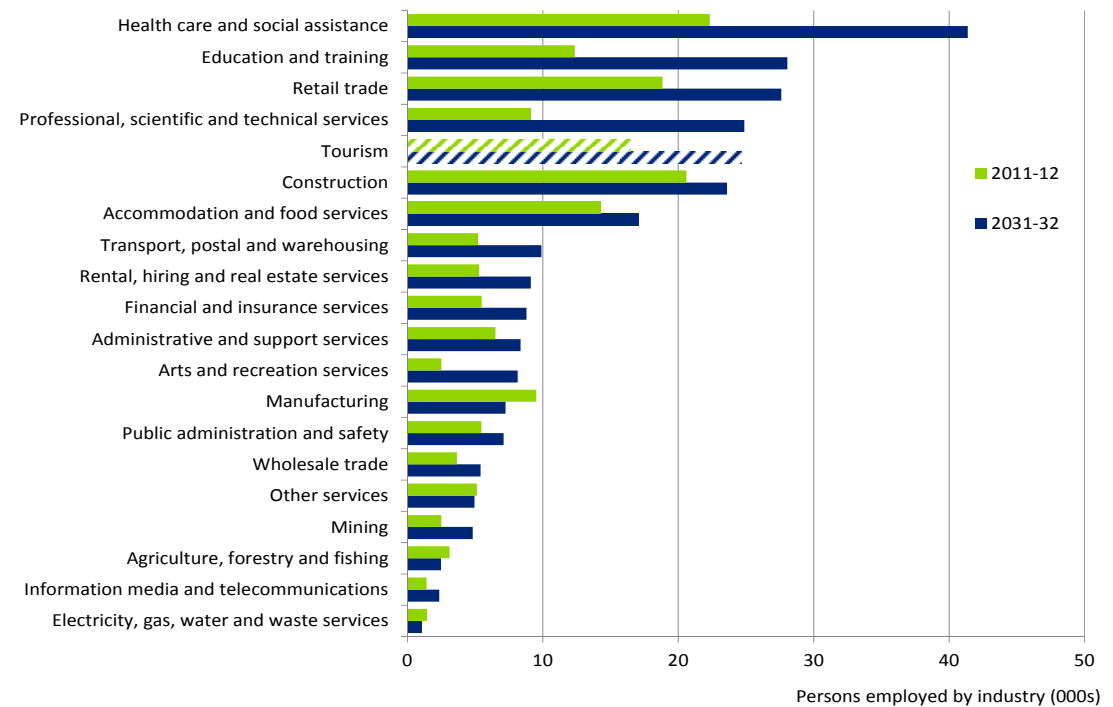
Sunshine Coast – future industry structure

The expected employment outcomes by industry are consistent with the tendency for economies to become increasingly services-oriented over time.

For the Sunshine Coast, health care and social assistance is still expected to be the major employer in the region (aided by an ageing population), though education and training, retail trade and professional services are all expected to leap ahead of construction (which was the second largest industry employer in 2011-12).

Tourism employment is expected to register growth over time (although it will also be subject to cyclical influences).

Sunshine Coast industry structure



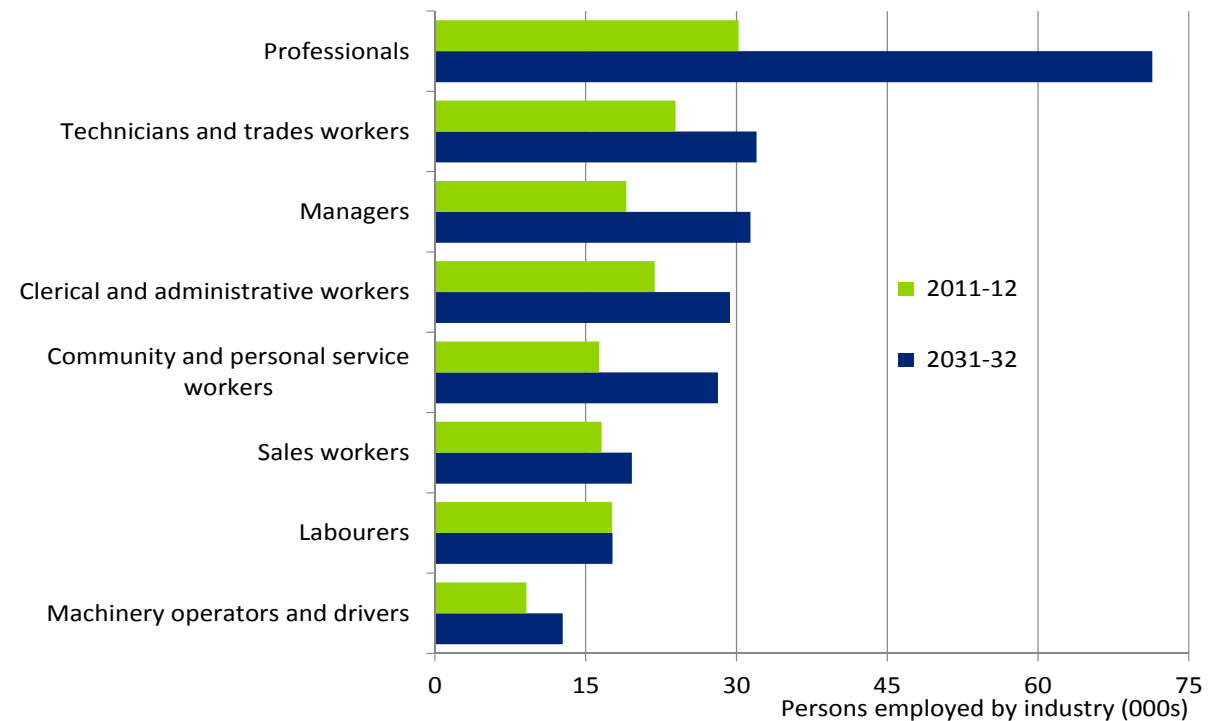
Sunshine Coast – future occupational structure

By occupation, demand for professionals is expected to be particularly strong over the period, followed by community and personal service workers (lifted by growth in health and aged care and hospitality workers in particular), and managers.

Occupational types which are expected to grow less strongly over the forecast period include labourers, sales workers and technicians and trades workers.

Expected softer growth in construction generates only modest demand for 'blue-collar' workers.

Sunshine Coast occupational structure





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