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. ... 
12. Australia 1.444

**RICHEST GDP $US per capita - 2014**

1. Norway 97,000
2. Switzerland 87,000
3. **Australia** 61,000
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. ... 
11. **Australia** 34%
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 21st century

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sydney</strong></td>
<td><strong>Sydney</strong></td>
<td><strong>Sydney</strong></td>
<td><strong>#</strong></td>
</tr>
<tr>
<td><strong>1</strong></td>
<td><strong>2,841,000</strong></td>
<td><strong>7,688,000</strong></td>
<td><strong>2,847,000</strong></td>
</tr>
<tr>
<td><strong>Melbourne</strong></td>
<td><strong>4,440,000</strong></td>
<td><strong>7,670,000</strong></td>
<td><strong>3,230,000</strong></td>
</tr>
<tr>
<td><strong>Brisbane</strong></td>
<td><strong>2,275,000</strong></td>
<td><strong>1,188,000</strong></td>
<td><strong>1,913,000</strong></td>
</tr>
<tr>
<td><strong>Perth</strong></td>
<td><strong>2,021,000</strong></td>
<td><strong>4,633,000</strong></td>
<td><strong>2,612,000</strong></td>
</tr>
<tr>
<td><strong>Adelaide</strong></td>
<td><strong>1,305,000</strong></td>
<td><strong>1,797,000</strong></td>
<td><strong>492,000</strong></td>
</tr>
<tr>
<td><strong>Gold Coast - T</strong></td>
<td><strong>615,000</strong></td>
<td><strong>1,225,000</strong></td>
<td><strong>610,000</strong></td>
</tr>
<tr>
<td><strong>Newcastle - M</strong></td>
<td><strong>431,000</strong></td>
<td><strong>722,000</strong></td>
<td><strong>298,000</strong></td>
</tr>
<tr>
<td><strong>Canberra - Queanbeyan</strong></td>
<td><strong>423,000</strong></td>
<td><strong>588,000</strong></td>
<td><strong>157,000</strong></td>
</tr>
<tr>
<td><strong>Sunshine Coast</strong></td>
<td><strong>298,000</strong></td>
<td><strong>503,000</strong></td>
<td><strong>206,000</strong></td>
</tr>
<tr>
<td><strong>Wollongong</strong></td>
<td><strong>289,000</strong></td>
<td><strong>384,000</strong></td>
<td><strong>95,000</strong></td>
</tr>
<tr>
<td><strong>Greater Hobart</strong></td>
<td><strong>219,000</strong></td>
<td><strong>340,000</strong></td>
<td><strong>160,000</strong></td>
</tr>
<tr>
<td><strong>Geelong</strong></td>
<td><strong>184,000</strong></td>
<td><strong>301,000</strong></td>
<td><strong>117,000</strong></td>
</tr>
<tr>
<td><strong>Townsville</strong></td>
<td><strong>180,000</strong></td>
<td><strong>265,000</strong></td>
<td><strong>46,000</strong></td>
</tr>
<tr>
<td><strong>Cairns</strong></td>
<td><strong>147,000</strong></td>
<td><strong>225,000</strong></td>
<td><strong>78,000</strong></td>
</tr>
<tr>
<td><strong>Greater Darwin</strong></td>
<td><strong>139,000</strong></td>
<td><strong>209,000</strong></td>
<td><strong>70,000</strong></td>
</tr>
<tr>
<td><strong>Toowoomba</strong></td>
<td><strong>114,000</strong></td>
<td><strong>197,000</strong></td>
<td><strong>83,000</strong></td>
</tr>
<tr>
<td><strong>Battle</strong></td>
<td><strong>99,000</strong></td>
<td><strong>193,000</strong></td>
<td><strong>107,000</strong></td>
</tr>
<tr>
<td><strong>Bendigo</strong></td>
<td><strong>92,000</strong></td>
<td><strong>181,000</strong></td>
<td><strong>82,000</strong></td>
</tr>
<tr>
<td><strong>Albury - Wodonga</strong></td>
<td><strong>88,000</strong></td>
<td><strong>161,000</strong></td>
<td><strong>69,000</strong></td>
</tr>
<tr>
<td><strong>Launceston</strong></td>
<td><strong>87,000</strong></td>
<td><strong>142,000</strong></td>
<td><strong>61,000</strong></td>
</tr>
</tbody>
</table>

*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 KPMG name and logo “cutting through complexity” are registered trademarks or trademarks of KPMG International Cooperative (“KPMG International”). Liability limited by a scheme approved under Professional Standards Legislation.
The University-student life form is expanding… either bigger campuses or more Universities or both

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

Note: This data shows Australian University enrolments only
Source: Australian Universities – Australian Government Department of Education and Training
There’s around 1.3 million University students in Australia today …

<table>
<thead>
<tr>
<th>Rank</th>
<th>University</th>
<th>Total University students 2014*</th>
<th>Percentage change 2008 to 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Monash University</td>
<td>67,076</td>
<td>19%</td>
</tr>
<tr>
<td>2</td>
<td>RMIT University</td>
<td>59,213</td>
<td>27%</td>
</tr>
<tr>
<td>3</td>
<td>The University of Sydney</td>
<td>55,975</td>
<td>16%</td>
</tr>
<tr>
<td>4</td>
<td>The University of Melbourne</td>
<td>55,596</td>
<td>24%</td>
</tr>
<tr>
<td>5</td>
<td>The University of New South Wales</td>
<td>53,481</td>
<td>20%</td>
</tr>
<tr>
<td>6</td>
<td>The University of Queensland</td>
<td>50,749</td>
<td>33%</td>
</tr>
<tr>
<td>7</td>
<td>Curtin University of Technology</td>
<td>50,429</td>
<td>24%</td>
</tr>
<tr>
<td>8</td>
<td>Deakin University</td>
<td>49,185</td>
<td>37%</td>
</tr>
<tr>
<td>9</td>
<td>Queensland University of Technology</td>
<td>47,218</td>
<td>20%</td>
</tr>
<tr>
<td>10</td>
<td>Griffith University</td>
<td>45,296</td>
<td>22%</td>
</tr>
<tr>
<td>11</td>
<td>University of Western Sydney</td>
<td>43,885</td>
<td>32%</td>
</tr>
<tr>
<td>12</td>
<td>Macquarie University</td>
<td>39,637</td>
<td>21%</td>
</tr>
<tr>
<td>13</td>
<td>Charles Sturt University</td>
<td>39,275</td>
<td>21%</td>
</tr>
<tr>
<td>14</td>
<td>The University of Technology, Sydney</td>
<td>39,032</td>
<td>21%</td>
</tr>
<tr>
<td>15</td>
<td>The University of Newcastle</td>
<td>37,414</td>
<td>32%</td>
</tr>
<tr>
<td>16</td>
<td>La Trobe University</td>
<td>35,081</td>
<td>21%</td>
</tr>
<tr>
<td>17</td>
<td>Swinburne University of Technology</td>
<td>34,609</td>
<td>70%</td>
</tr>
<tr>
<td>18</td>
<td>The University of South Australia</td>
<td>31,962</td>
<td>-11%</td>
</tr>
<tr>
<td>19</td>
<td>The University of Wollongong</td>
<td>31,395</td>
<td>34%</td>
</tr>
<tr>
<td>20</td>
<td>Australian Catholic University</td>
<td>29,613</td>
<td>82%</td>
</tr>
</tbody>
</table>

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

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

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

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

- 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!

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

Note: Approximate students includes domestic and international students

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Melbourne has Universities to service its suburbs

<table>
<thead>
<tr>
<th>Region</th>
<th>Population 2014</th>
<th>University students 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melbourne north</td>
<td>994,000</td>
<td>33,900</td>
</tr>
<tr>
<td>Melbourne inner</td>
<td>592,000</td>
<td>128,350</td>
</tr>
<tr>
<td>Melbourne west</td>
<td>698,000</td>
<td>27,700</td>
</tr>
<tr>
<td>Melbourne south-east</td>
<td>2,090,000</td>
<td>82,200</td>
</tr>
<tr>
<td>Greater Geelong</td>
<td>225,000</td>
<td>11,050</td>
</tr>
</tbody>
</table>

**Notes:** Approximate students includes domestic and international students


---

**Melbourne Universities**
- Victoria University
- RMIT University
- University of Melbourne
- La Trobe University
- Monash University
- Deakin University
- Swinburne University
- Australian Catholic University

---

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Even Perth has University campuses north side and south side

<table>
<thead>
<tr>
<th>Region</th>
<th>Population 2014</th>
<th>University students 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perth Inner</td>
<td>472,000</td>
<td>83,850</td>
</tr>
<tr>
<td>East</td>
<td>441,000</td>
<td>0</td>
</tr>
<tr>
<td>North</td>
<td>571,000</td>
<td>12,000</td>
</tr>
<tr>
<td>South</td>
<td>537,000</td>
<td>31,150</td>
</tr>
</tbody>
</table>


Perth Universities
- Edith Cowan University
- Notre Dame University
- University of Western Australia
- Curtin University
- Murdoch University

Perth Inner: 472,000
83,850 students

East: 441,000
0 students

North: 571,000
12,000 students

South: 537,000
31,150 students
The Greater Moreton Bay Region has been over-looked by the knowledge worker development industry.

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

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

Monash, VIC

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


The blue boundary identifies the Statistical Area Level 2 geographic definition
Sydney too has its very own “Geek Island”

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


The blue boundary identifies the Statistical Area Level 2 geographic definition.
Even Perth has the makings of a suburban knowledge worker hotspot

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


The blue boundary identifies the Statistical Area Level 2 geographic definition
The MBRUP has all the attributes to be Brisbane’s knowledge worker hotspot.

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


The blue boundary identifies the Statistical Area Level 2 geographic definition.
The MBRUP has better transport than Monash

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

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

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**

- **5km**
  - Strathpine Centre

- **10km**
  - Westfield North Lakes
  - Deception Bay Shopping Centre
  - Aspley Hypermarket
  - Centro Taigum

- **15km**
  - Westfield Chermside
  - Brookside Shopping Centre
  - Arana Hills Plaza
  - Peninsula Fair Kippa-Ring
  - Burpengary Plaza

- **20km**
  - Morayfield Shopping Centre
  - Stafford City
  - Centro Toombul

Source: MapInfo Professional, Metways Online 2015

Population of Greater Brisbane 2026: 2,854,000
Local high schools will have somewhere local to send kids

Schools within 5km

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

Source: MapInfo Professional, Melways Online 2015
Job creation and economic engine room

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)

10,000
Uni students within 10 years

CREATE OVER 2,200
ONGOING JOBS for the Greater Moreton Bay Region by 2031

100 DIRECT
CONSTRUCTION JOBS
each year for (2016-30)

$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

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

5
REGIONAL SHOPPING CENTRES
(within 10kms of site)

250 ADDITIONAL
ONGOING JOBS
in the local education and health sector from 2031

812,000
RESIDENTS in the Greater Moreton Bay Region in 2031

$950M
ECONOMIC BENEFIT
to the greater Moreton Bay Region

100 DIRECT
CONSTRUCTION JOBS
each year for (2016-30)

67,000
18-24 YEAR OLDS IN the Greater Moreton Bay Region by 2031

$950M
ECONOMIC BENEFIT
to the greater Moreton Bay Region

Connectivity

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

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

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

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.

The Greater Moreton Bay Region’s University is the best location for a new University in Australia based on current demographics.
For too long Moreton has been overlooked…
the time for a local University is now

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

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

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

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
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