



Beyond the Horizon Update and Workshop

Regional Development Australia Gold Coast Inc

11 May 2016



We took soundings from Gold Coast business leaders ...

Soheil & Anne Abedian	- <i>Sunland Group</i>
Tony Tippett	- <i>Robina Group</i>
Professor Ned Pankhurst	- <i>Griffith University</i>
Chris Mills	- <i>Qld Airports Limited</i>
Hans Torv	- <i>102.9 Hot Tomato</i>
Paul Donovan	- <i>Gold Coast Tourism</i>
John Punch	- <i>Short Punch & Greatorix Lawyers</i>
Shannon Willoughby	- <i>Study Gold Coast</i>
Rebecca Frizelle	- <i>James Frizelle's Automotive</i>
Greg Jenke	- <i>John Flynn Private Hospital</i>
Paul Salter	- <i>St Hilda's School</i>
Trish Hogan	- <i>Pindara Private Hospital</i>

... and asked their view as to how things have changed in 12 months

- Key achievements generally?
- Specifically in your industry?
- Opportunities for the future?
- Other comments?

Key achievements over the last 12 months

- Light Rail Stage 1 completed and Stage 2 announced
- Stable cohesive government
- Future Gold Coast changed perception
- Created a focus and given gravitas

Industry achievements over the last 12 months

- Gold Coast Health and Knowledge Precinct announced
- China flights to Wuhan and Hong Kong
- Chinese developers active
- Domestic tourism up ... international passengers up
- New health facilities under construction
- Commonwealth Games venues and Athletes Village commenced
- Investment in retail and leisure property – Pacific Fair redeveloped
- Jupiter's under construction
- Gold Coast Airport upgrade commenced

Opportunities for further development

- Commonwealth Games 2018
- Develop south end of the Gold Coast
- Cruise ship terminal
- Maintain tourism and expand education and health
- Better story telling about the Gold Coast
- Pursue Light Rail Stage 3
- Pursue Skyway

Other comments and ideas

- Develop a dive site
- Promote the Cultural & Arts Precinct
- Monitor apartment supply post 2019
- Identify and celebrate positive stories about the Gold Coast
- Multi-level golf range at Carrara

Media outcome has been remarkably positive

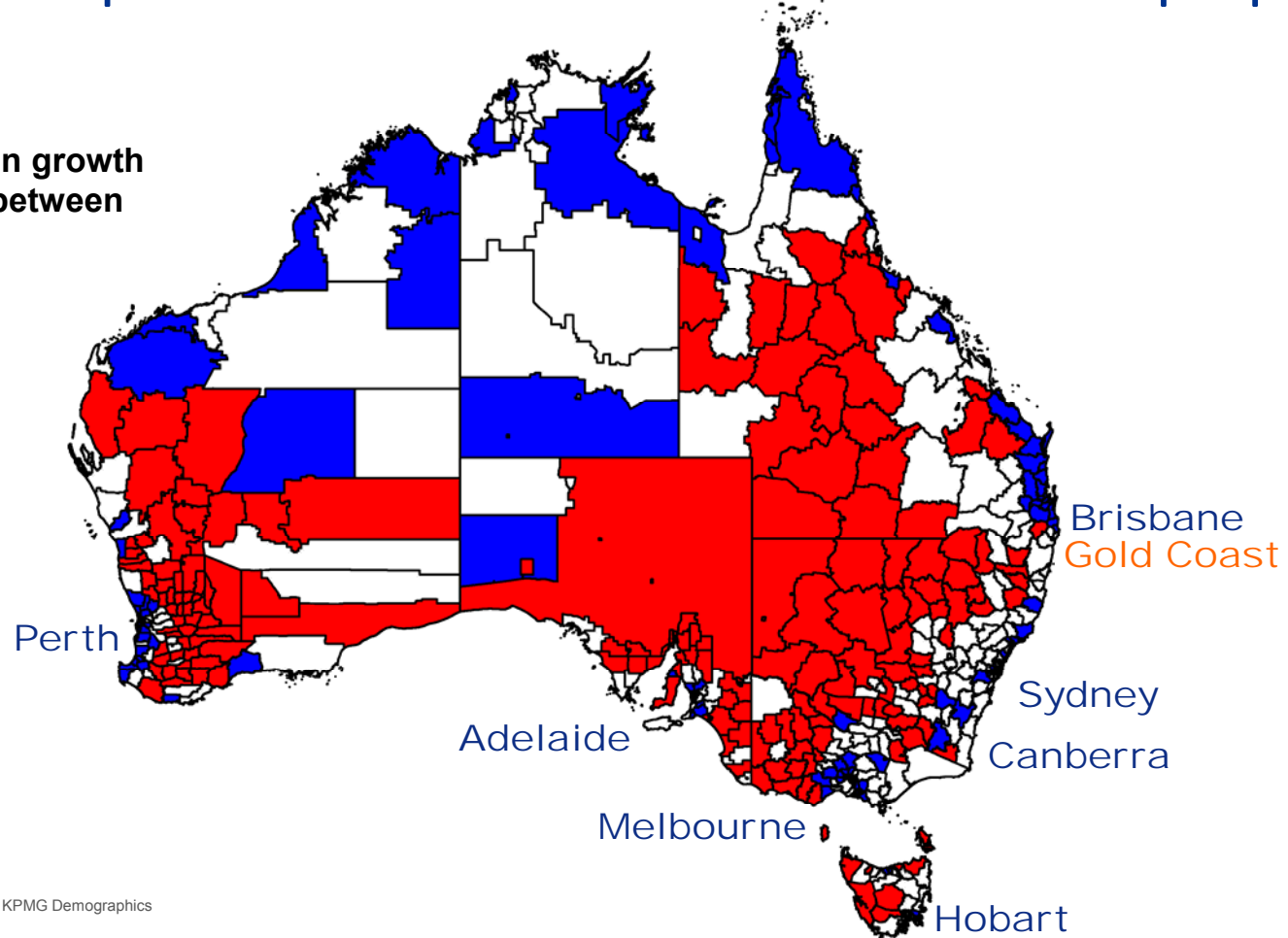
- Launch February 2015
- Op-ed *Sunday Mail*, *The Australian* front page, *Gold Coast Bulletin*, *Courier Mail*
- Website, social media, positive public perception
- Business presentations Brisbane, Sydney, China, UAE
- Genuine shift in perception ... well timed with infrastructure and Commonwealth Games
- Go Queensland *Courier Mail* April 2016 advocates decentralisation to the Gold Coast



Gold Coast Update

The Gold Coast speaks to a cultural truth about the Australian people

Areas of high population growth
(1.5% pa) and net loss between
1992 and 2015

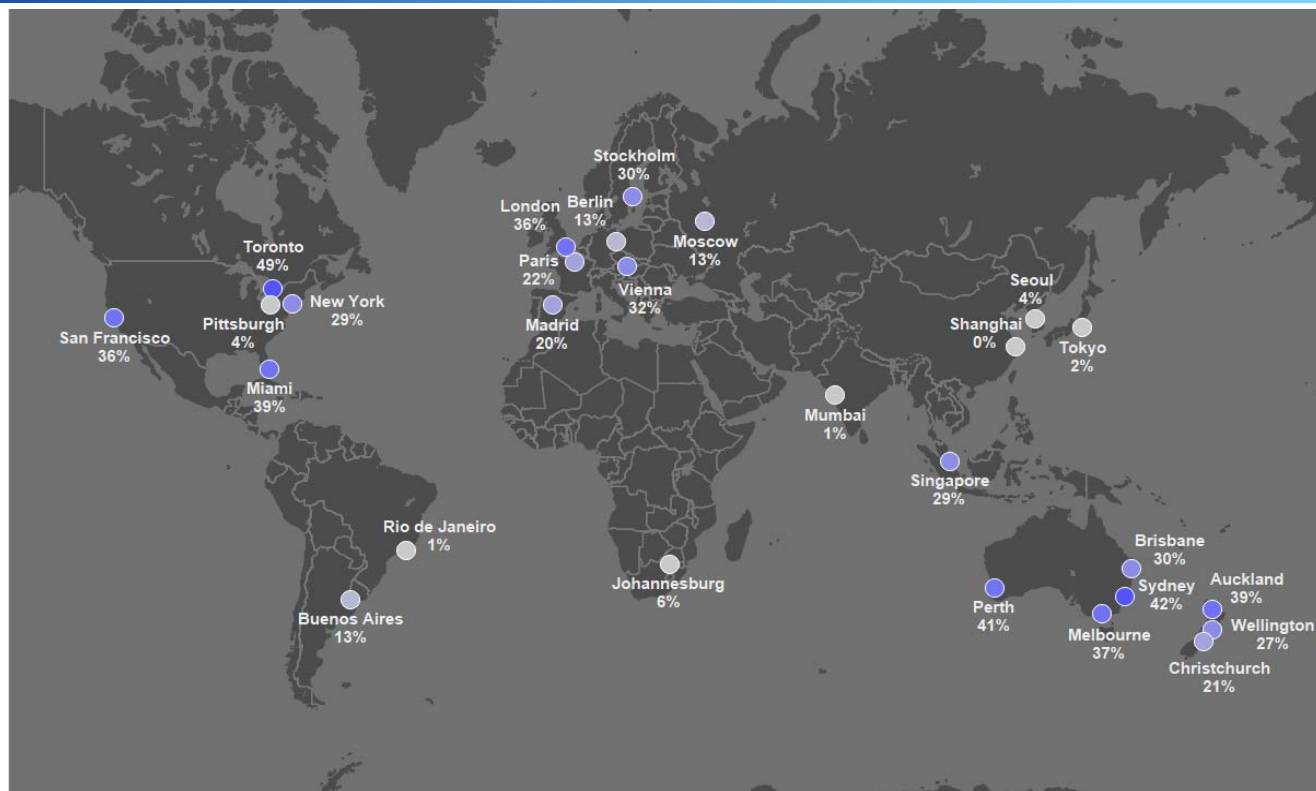


Source: Based on Australian Bureau of Statistics data; KPMG Demographics

Australia must develop a culture of innovation ... let's make a start on the Gold Coast

United States			Australia				
	Year	USbn		Year	USbn		
1.	Apple	1976	522	1.	BHP Billiton	1885	110
2.	Google	1998	508	2.	Commonwealth Bank	1911	94
3.	Microsoft	1975	412	3.	Westpac Banking	1817	72
4.	Exxon Mobil	1870	321	4.	National Australia Bank	1893	51
5.	Facebook	2004	311	5.	ANZ	1835	50
6.	Berkshire Hathaway	1955	310	6.	Telstra	1901	48
7.	Amazon.com	1994	298	7.	CSL	1916	35
8.	Johnson & Johnson	1886	283	8.	Wesfarmers	1914	33
9.	General Electric	1892	266	9.	Woolworths	1924	22
10.	Wells Fargo	1852	250	10.	Macquarie Group	1970	18

Australia's largest cities are truly cosmopolitan ... we welcome migrants and foreign students



Proportion of city population comprising international-born residents as measured by local censuses



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Source: Source: relevant local census data; KPMG Demographics

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A greater proportion of the future Gold Coast population will be overseas-born ... the city must be inclusive and connected



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China's urban middle-class is expanding ...

this presents a lifestyle and education opportunity for the Gold Coast

		Population M	
	City	2015	2000
1	Shanghai *	24	14
2	Beijing *	20	10
3	Chongqing *	13	8
4	Guangzhou *	12	7
5	Tianjin	11	7
6	Shenzhen *	11	7
7	Wuhan *	8	7
8	Chengdu *	8	4
9	Dongguan	7	4
10	Nanjing *	7	4

Top 20 cities in China at 2015 and 2000

		Population M	
	City	2015	2000
11	Hong Kong *	7	7
12	Foshan	7	4
13	Hangzhou	6	3
14	Shenyang	6	5
15	Xi'an *	6	4
16	Suzhou	5	2
17	Haerbin	5	4
18	Qingdao	5	3
19	Dalian	4	3
20	Xiamen *	4	1

*** Cities connected into Australia**



There is scope to increase the number of university students on the Gold Coast

		2011	Students per 1,000 residents
1	Sydney	229,000	52
2	Melbourne	214,000	53
3	Brisbane	108,000	52
4	Perth	85,000	49
5	Adelaide	62,000	50
6	Gold Coast-Tweed	23,000	41
7	Newcastle-Maitland	18,000	46
8	Australian Capital Territory	28,000	79
9	Sunshine Coast	9,000	32
10	Wollongong	14,000	51
	Total	933,000	43

Full and part-time university student numbers living in top ten cities at the 2011 Census

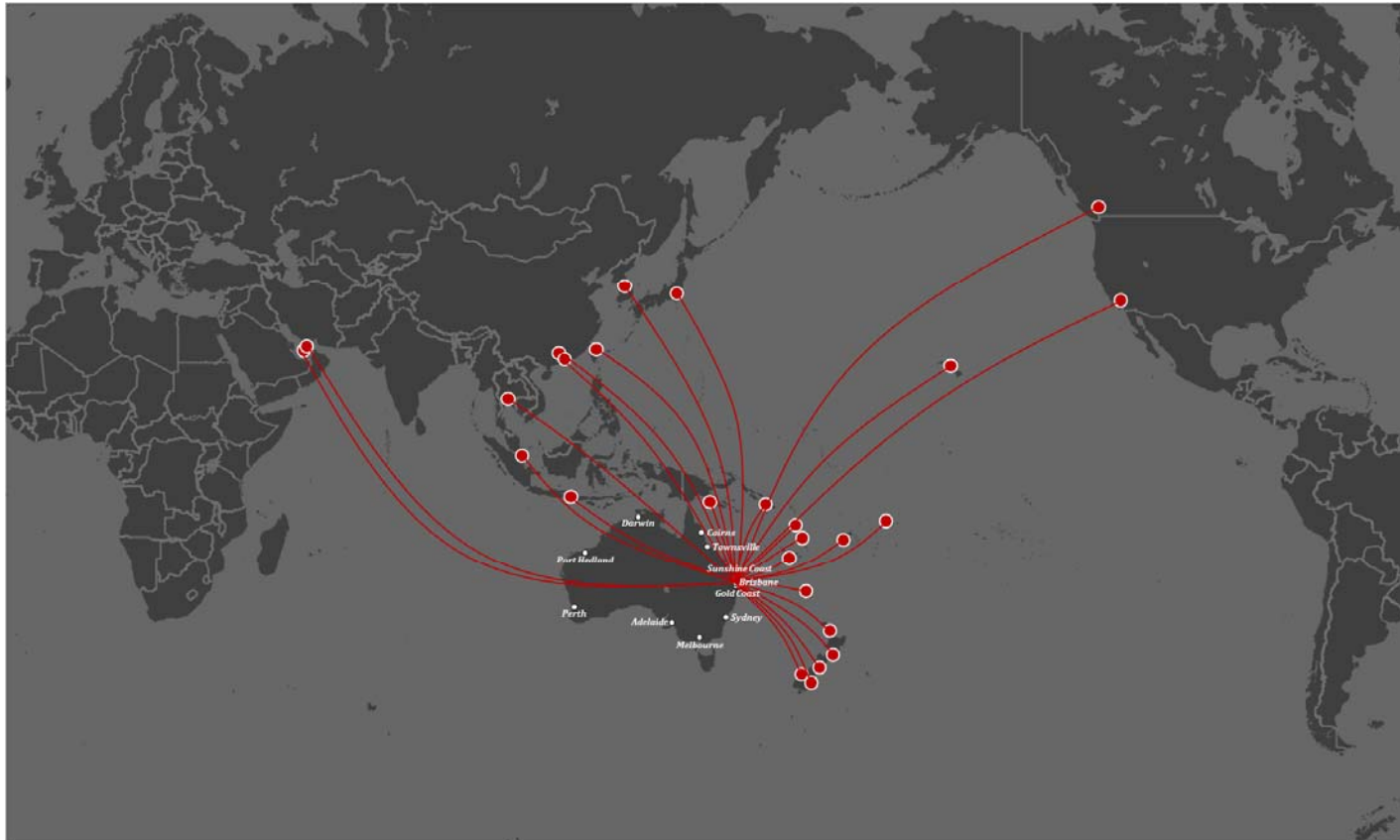


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Brisbane, Gold Coast North, connects with 27 international cities...



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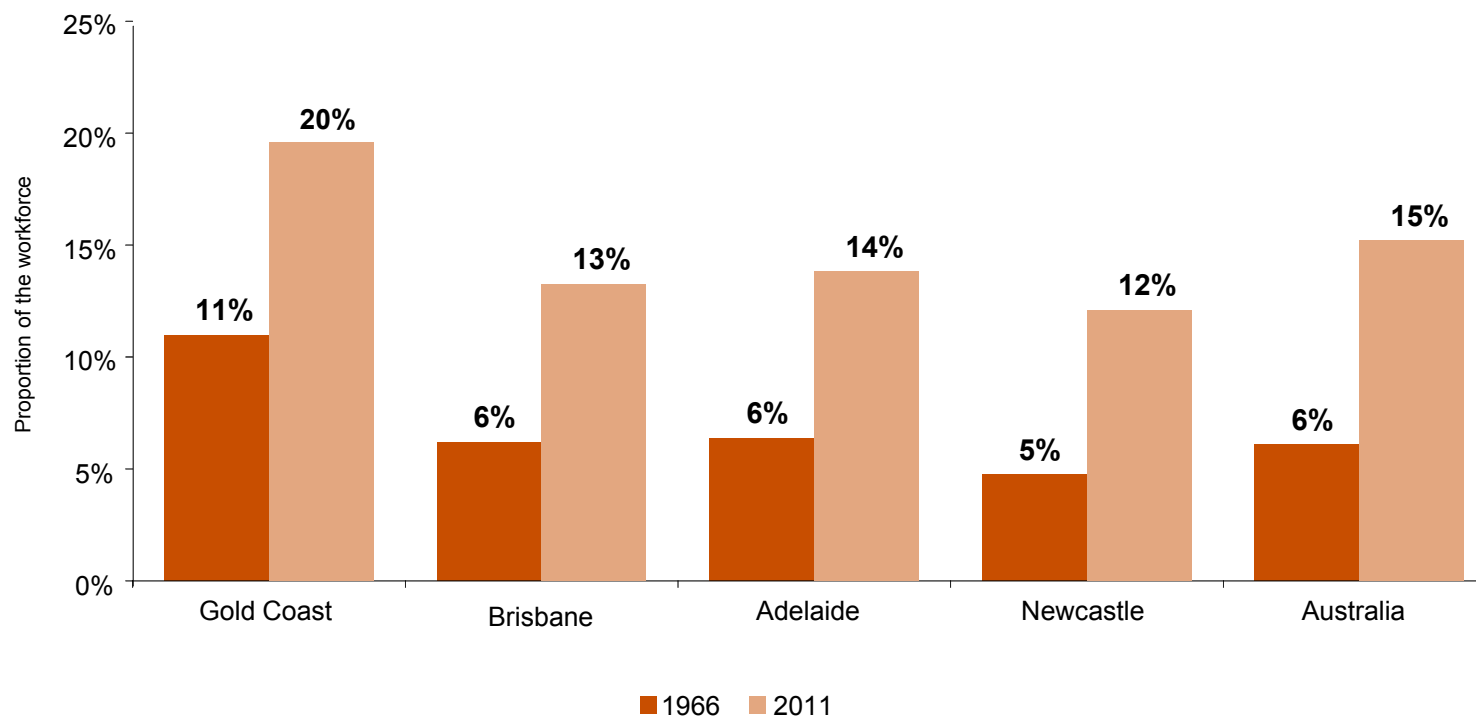
... the Gold Coast airport connects with 9 overseas cities including Wuhan & Hong Kong



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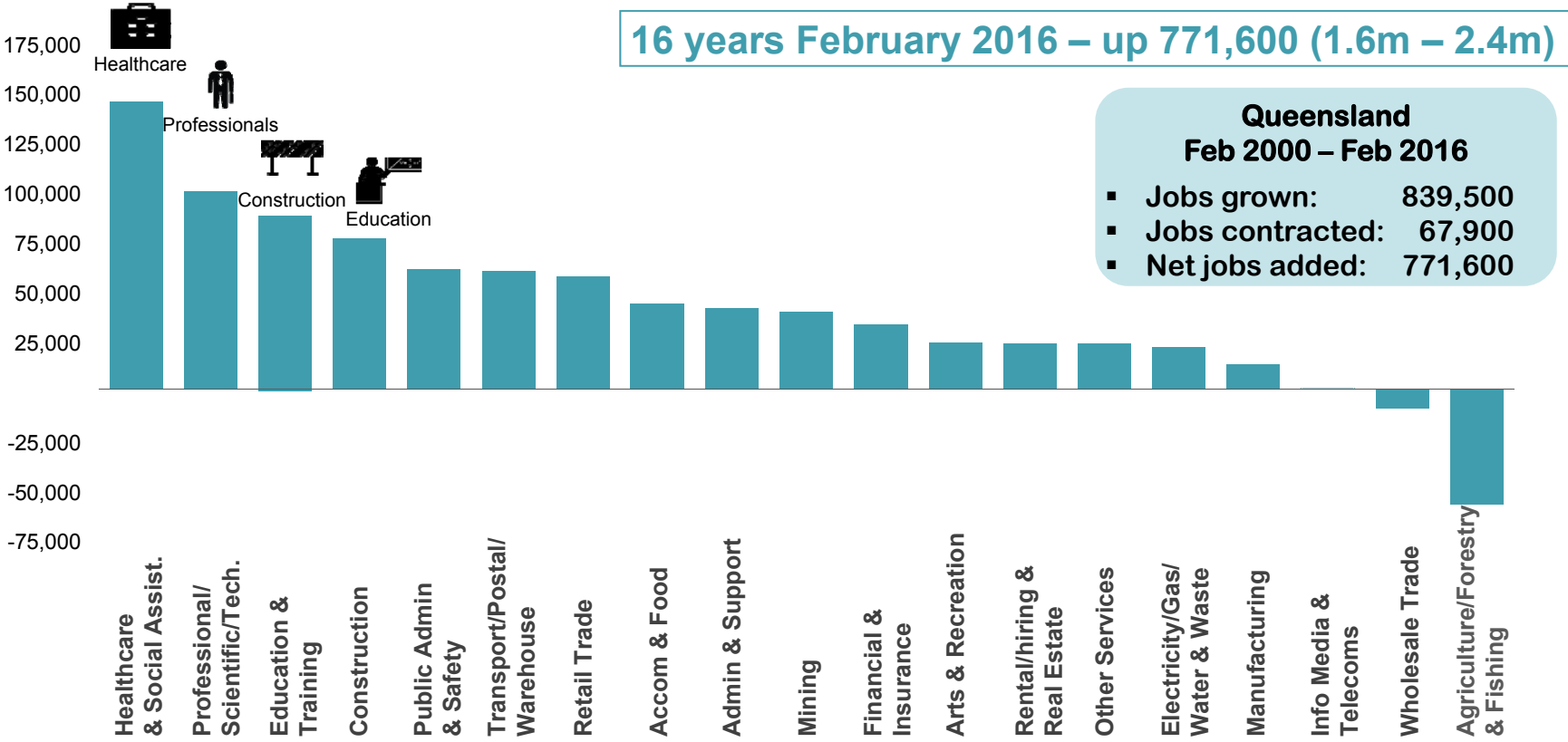
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The Gold Coast has always been a city of entrepreneurs ... perhaps the city should embrace a Festival of Entrepreneurial Thinking?



Proportion of the workforce who owned their own business by region in 1966 and 2011

The workforce is transitioning to knowledge work ... must mean more students



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Key outcomes and aspirations ... so far

1. The Future Gold Coast initiative has been declared a success ... momentum is building
2. Big projects are being completed like the Light Rail and Pacific Fair and the city is better connected than ever
3. But there is more to do and especially around education, China connectivity, the Health and Knowledge Precinct in Southport, Ramsay Health research collaboration with Bond University, a Festival of Enterprise
4. And then there are the aspirational projects such as Light Rail Stage 3, the Cruise Ship Terminal, Skyway.....and build upon a galvanised community



Workshop

City leader workshops

- 7 sectors
 - Diverse cross-section of the Gold Coast business community invited to participate
 - Brainstorm initiatives aligned with current city planning
 - Outcomes published on Future Gold Coast web-site
<http://futuregoldcoast.com.au>
1. Investment & Development
 2. Education
 3. Health
 4. Tourism & Retail
 5. Smart City
 6. Professional Services
 7. Sports, Community & Arts



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