



cutting through complexity™

Timber Queensland

**Queensland in 2040: the who, what,
where, why and how of population and
housing**

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Queensland is coming back in terms of population growth and housing demand

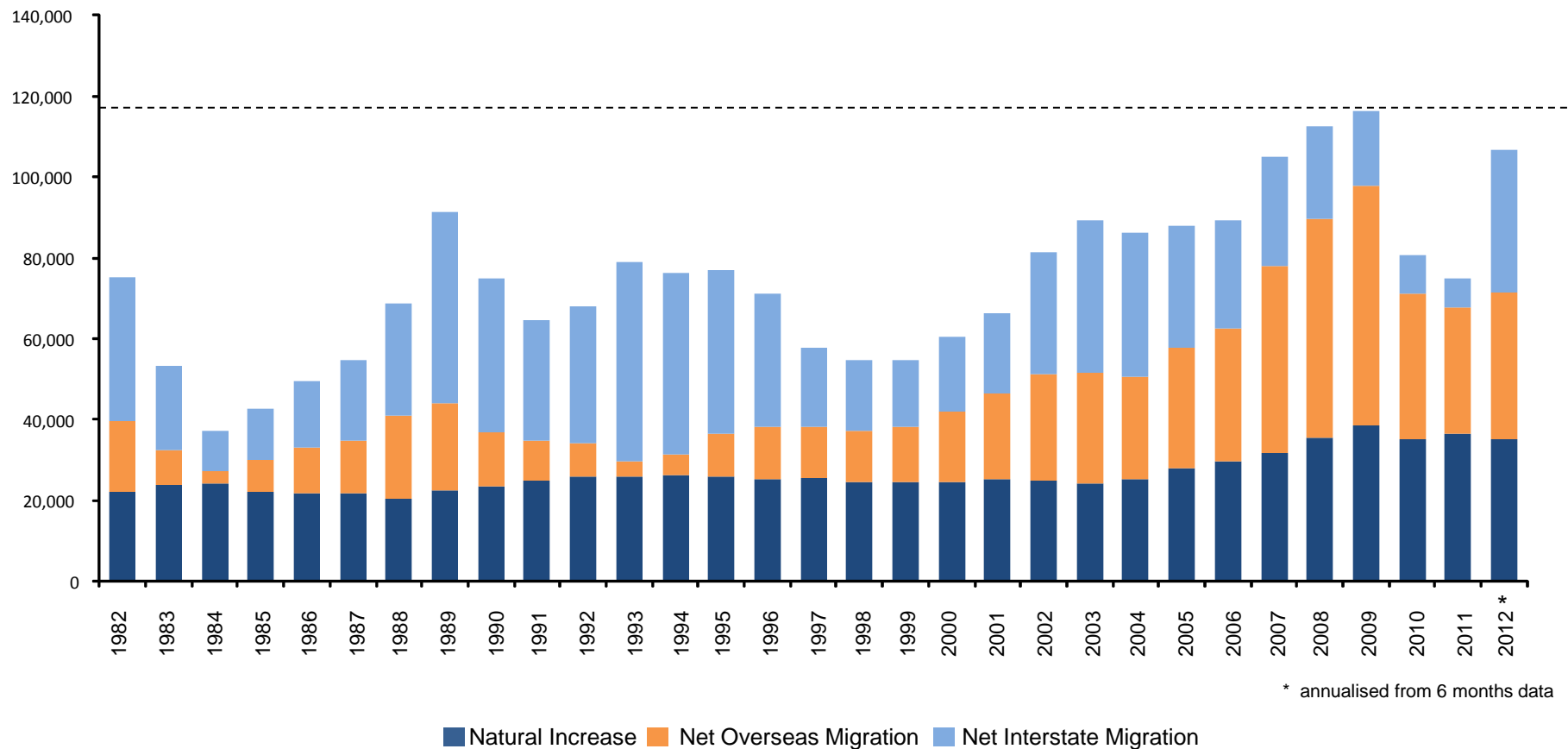
2.90m

3.56m

4.47m

1.20m @ 1950

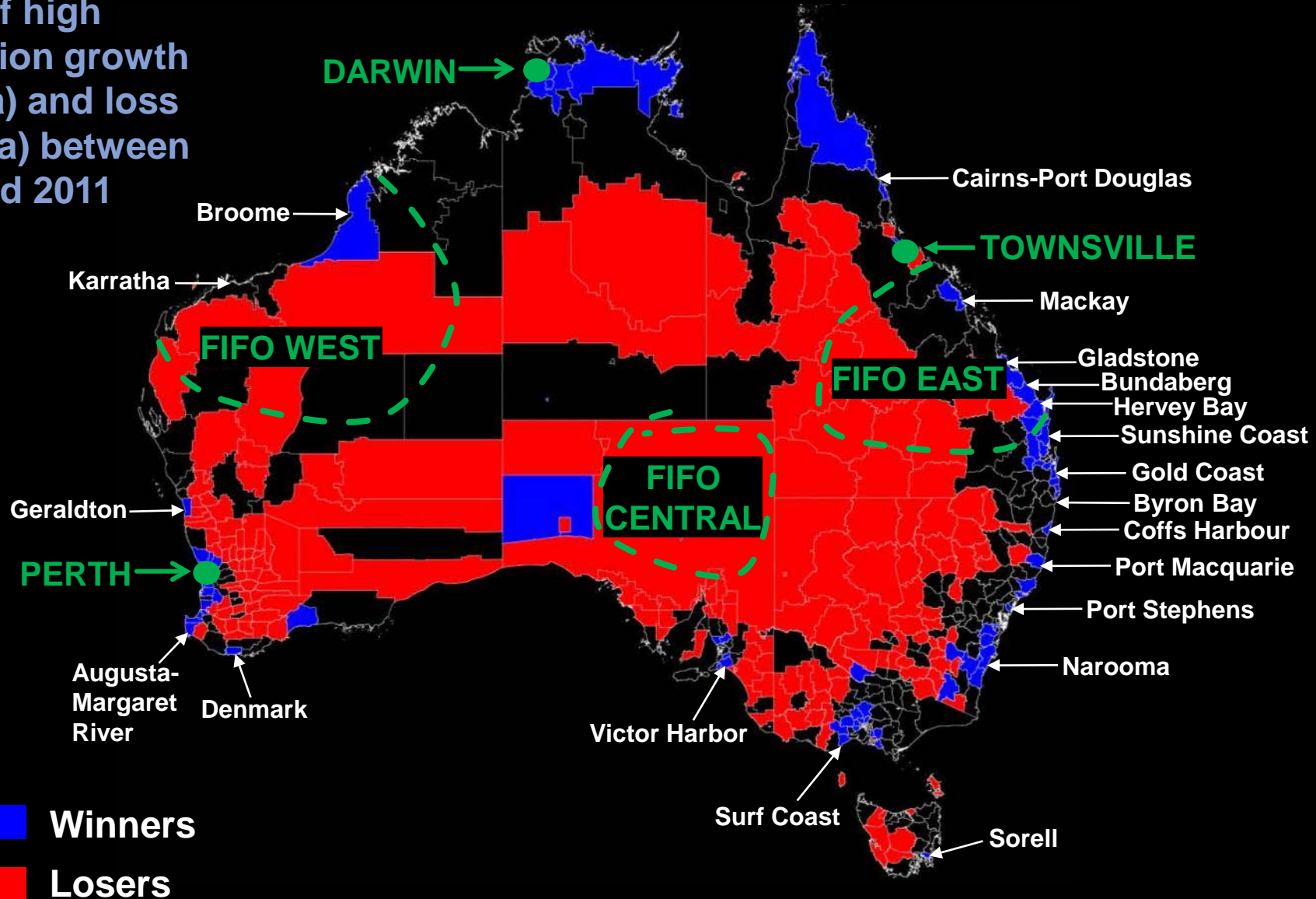
8.22m @ 2050



Components of population growth in Queensland between 1982 and 2012

Australians are reluctant to move from the capital cities or the coast ... FIFO proves this point

Areas of high population growth (>2% pa) and loss (<-1% pa) between 1986 and 2011



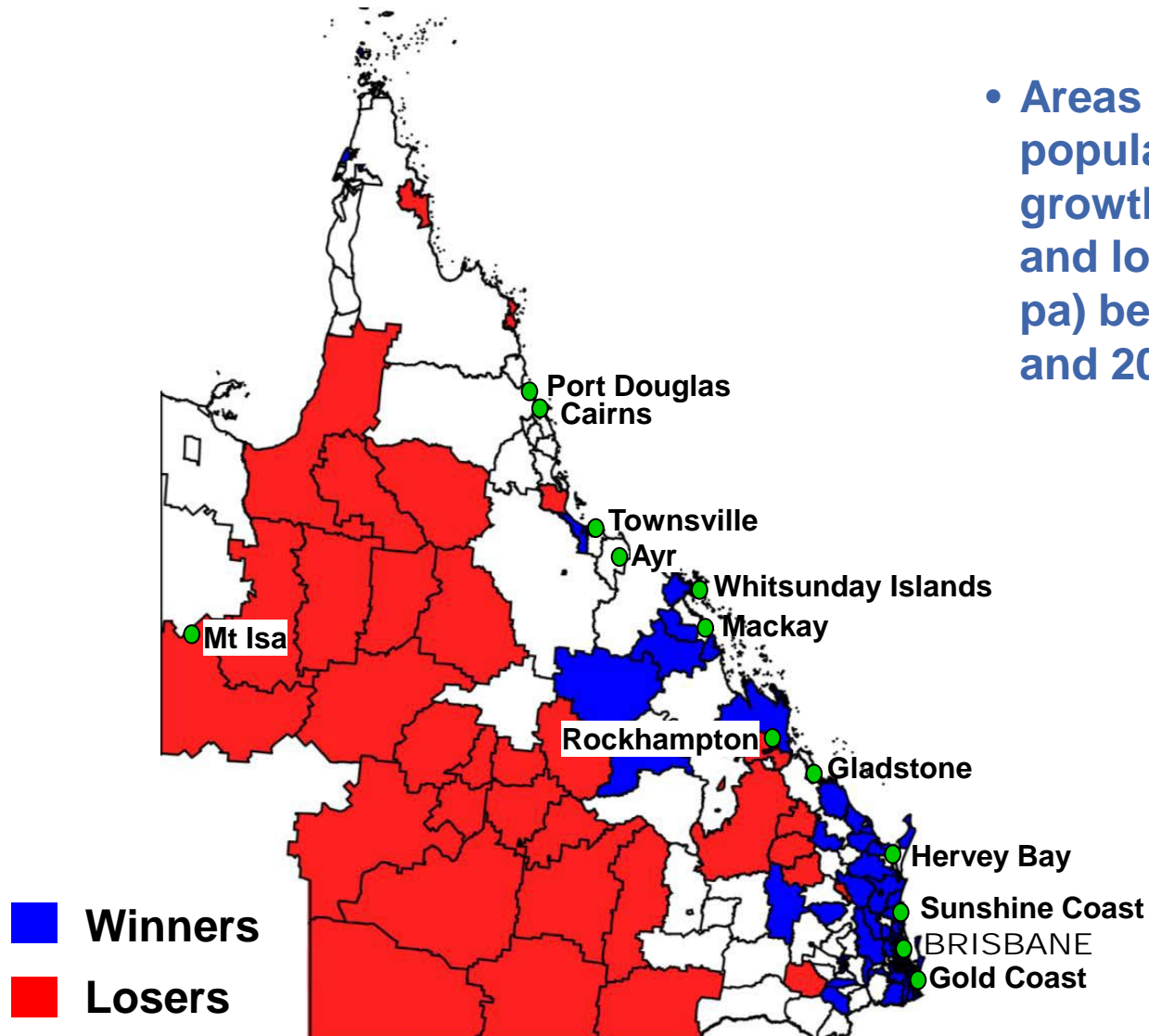
Top 10 growth areas requiring housing in Queensland ... South East Queensland and key regionals

		Change 10-11	% change
1.	Brisbane	14,100	1.3
2.	Gold Coast	9,637	1.8
3.	Moreton Bay	8,118	2.1
4.	Logan	5,325	1.9
5.	Sunshine Coast	4,955	1.5
6.	Ipswich	4,920	2.9
7.	Townsville	4,511	2.4
8.	Cairns	2,647	1.6
9.	Mackay	2,452	2.1
10.	Redland	2,380	1.7

- Top 10 growth areas in Queensland over 12 months to June 2011

Meet the two states of Queensland ... the fast-growing coast and south east are now joined by the Bowen Basin

- Areas of high population growth (>2% pa) and loss (<0% pa) between 2001 and 2011



Consumer behaviour and belief varies throughout Queensland

Proportion volunteers *

2011 Census	
	%
• Barcaldine	41
• Maleny	35
• Miles	34
• Blackall	33
• Chelmer	33
• Palm Island	8
• Mission River	11
• Yarrabah	11
• Deeragun	12
• Hillcrest	12

Belief *

2011 Census	
	%
• Kowanyama	95
• Hope Vale	94
• Cotswold Hills	92
• Yarrabah	92
• Allora	91
• Petrie Terrace	52
• Cooran	57
• Highgate Hill	59
• West End	59
• Port Douglas	60

Homes with internet*

2011 Census	
	%
• Brookwater	99
• Pullenvale	97
• Eatons Hill	96
• Bunya	96
• Upper Kedron	96
• Yarrabah	26
• Mount Morgan	53
• Monto	56
• Cunnamulla	56
• Texas	57

* Excludes suburbs with total population less than 1,000 and with fewer than 400 households

The main game remains detached dwellings in Queensland

		Queensland		Australia
	2006	2011	% change	% change
Separate House	1,107,000	1,215,000	10%	7%
Semi-detached House	106,000	129,000	22%	16%
Flat, unit or apartment	156,000	182,000	17%	13%
Caravan, cabin, houseboat	17,000	16,000	-6%	-7%
Other*	6,000	5,000	-17%	-10%
Total	1,392,000	1,547,000	11%	9%

Queensland dwellings at 2001: 1,355,000

* Includes improvised homes, tents, sleepers out, homes attached to shops and offices, not stated and not applicable

- Comparison of the number of occupied private dwellings in Queensland between the 2011 and 2006 Censuses

Queenslanders organise themselves into families ... families want detached houses

		Queensland		Australia	
	2006	2011	% change	% change	
Couple family with children	447,000	491,000	10		7
Couple family w/out children	404,000	453,000	12		11
One parent family	164,000	185,000	13		10
Other family	17,000	19,000	12		9
Lone person households	317,000	354,000	12		9
Group households	63,000	73,000	16		14
Total	1,412,000	1,575,000	12		9

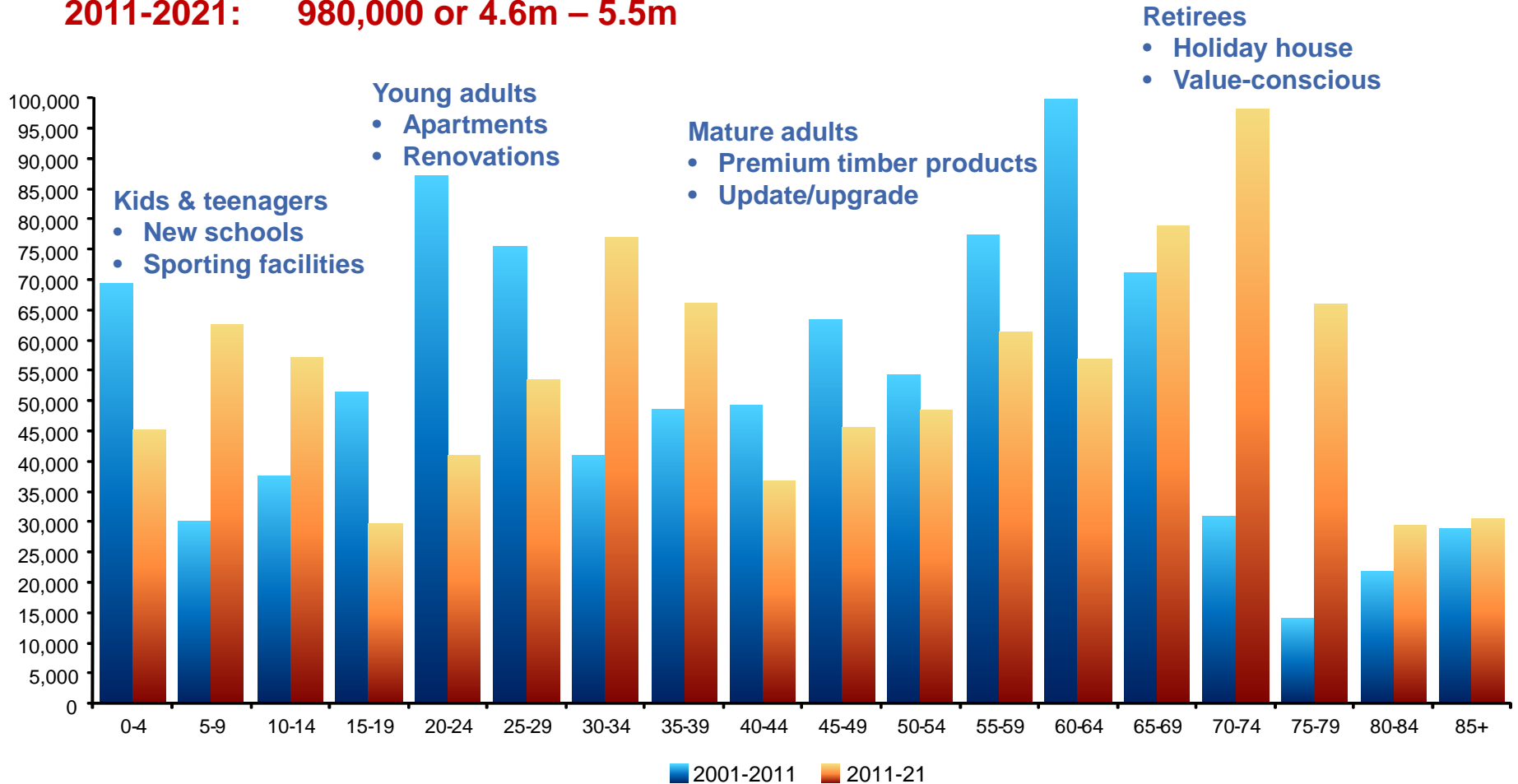
Queensland households at 2001: 1,289,000

- Comparison of household composition in Queensland between the 2011 and 2006 Censuses

Anticipate demand around changes in the Queensland demographic profile

2001-2011: 950,000 or 3.6m – 4.6m

2011-2021: 980,000 or 4.6m – 5.5m



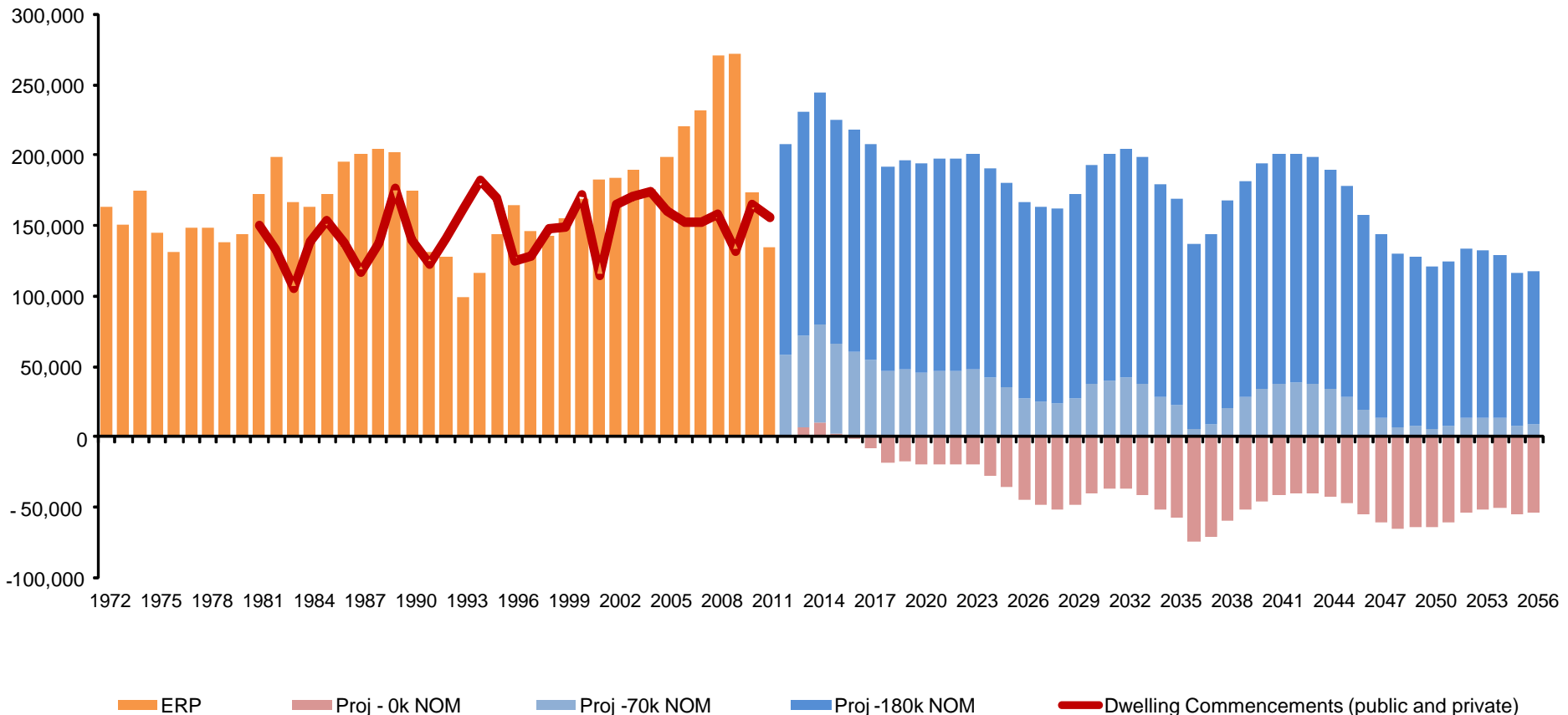
- Net change in Queensland by 5-year age group over 10 years to 2011 and 10 years to 2021

Australia is moving from baby boom to baby bust ... we need either more tax or more tax payers

1972

2012

2056



- Net growth in working age population (15-64) over 100 years in Australia based on 2008 outlook with different annual migration assumptions

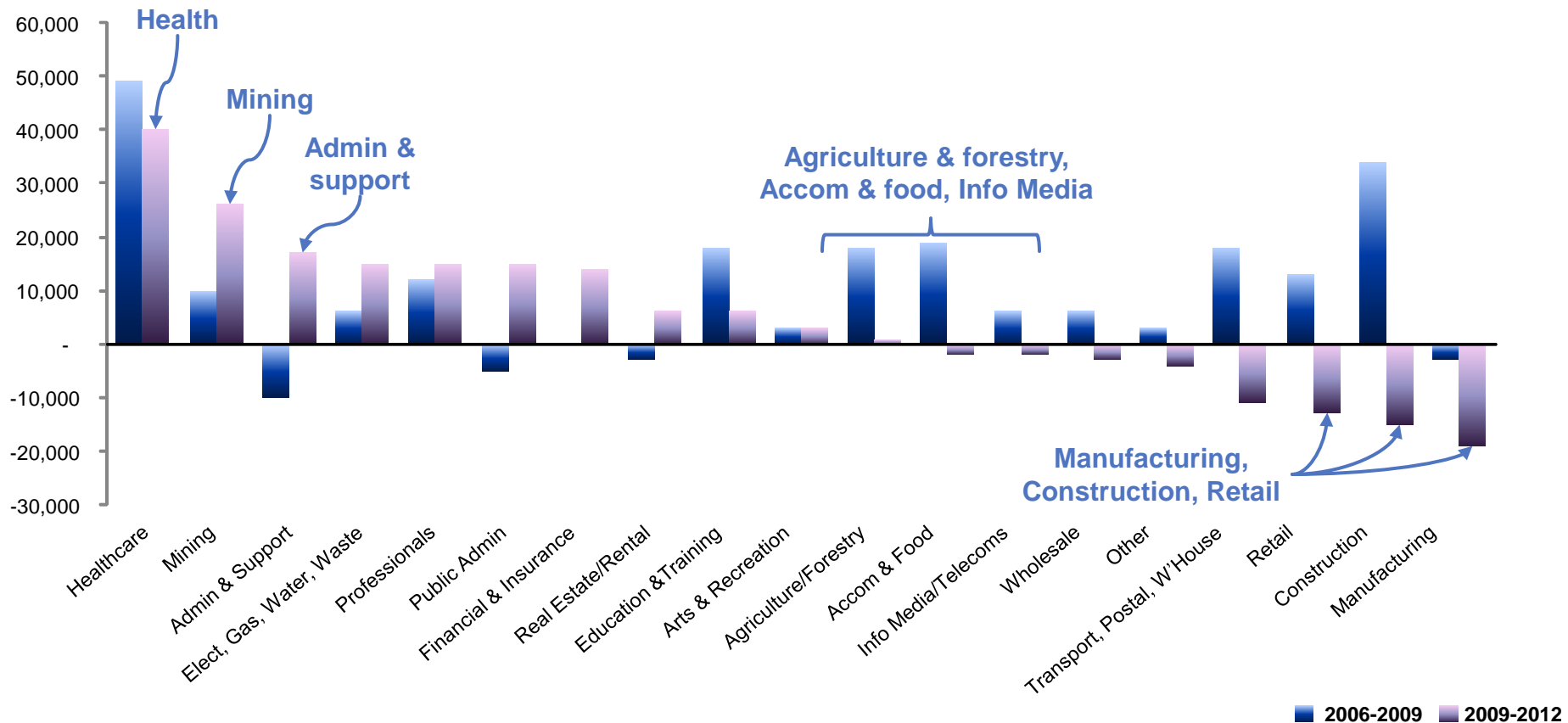
The population debate needs to be re-framed ... Australia is very much on target for a Big Australia

1930	6.5m	
1970	12.7m	93%
2010	22.2m	74%
2050 (IGR)	35.9m	62%
2090 (ABS)	42.7m	19%

There has been a shift in the Queensland economy ... away from manufacturing and towards healthcare

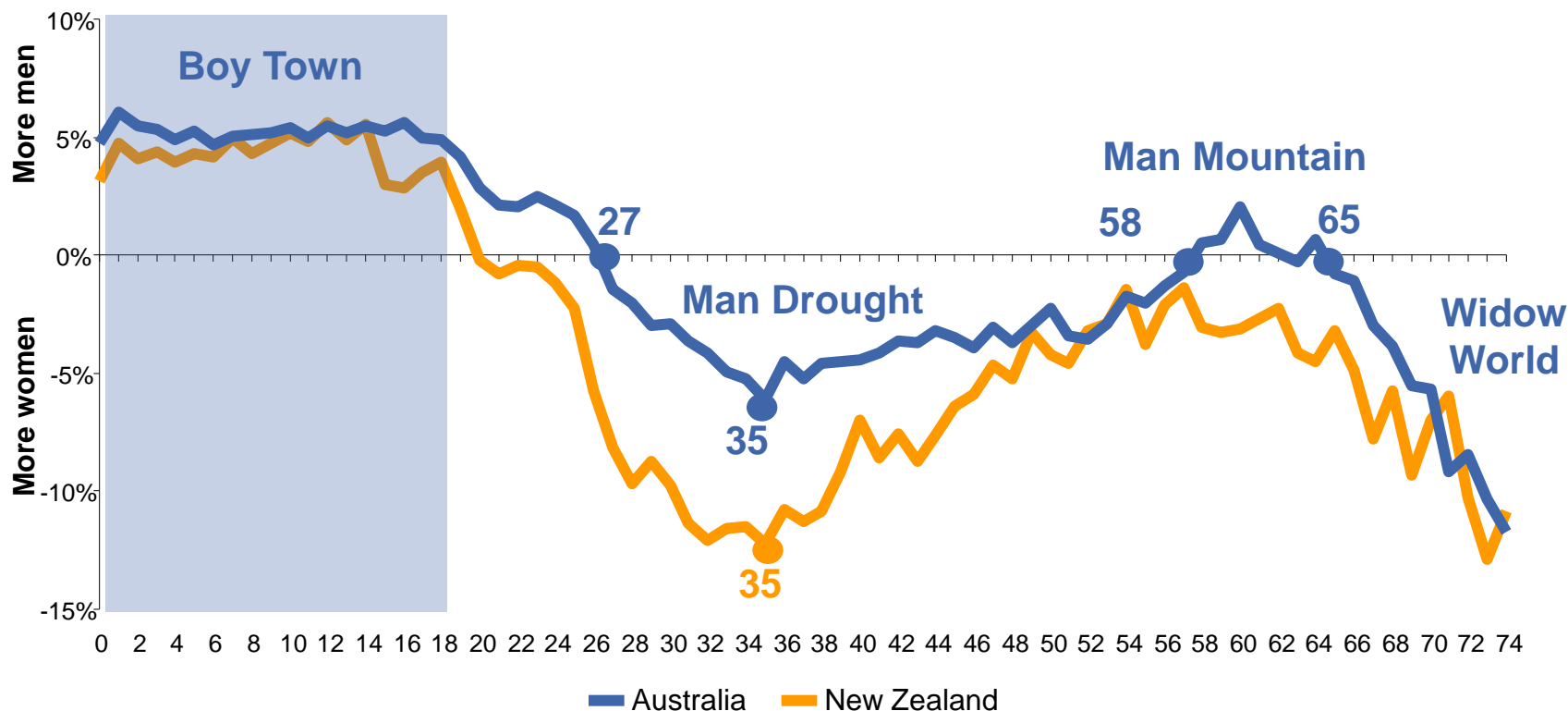
3 years May 2009 – up 194k (2.1m – 2.2m)

3 years May 2012 – up 90k (2.2m – 2.3m)



- Net change in total jobs in Queensland over two successive three-year periods between May 2006 and May 2012

The Great Australasian Man Drought ... Stage 3A restrictions now apply



- Percentage difference in the number of men and women in Australia and New Zealand by individual year in 2006

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