



*cutting through complexity™*

# 2014 ACS State Conference

## The Australian Way: Motivational Forces that Shape the Australian Community

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# Australia is a good place to invest

## Biggest

\$USbn  
GDP 2012

1. United States	16.245
2. China	8.227
3. Japan	5.961
4. Germany	3.428
5. France	2.613
6. United Kingdom	2.476
7. Brazil	2.253
8. Russian Fed.	2.015
9. Italy	2.015
10. India	1.859
<b>12. Australia</b>	<b>1.532</b>

## Richest

GDP > \$US500bn  
\$US GDP pc 2012

1. Norway	100,000
2. Switzerland	79,000
<b>3. Australia</b>	<b>68,000</b>
4. Sweden	56,000
5. United States	52,000
6. Canada	52,000
7. Japan	47,000
8. Netherlands	46,000
9. Germany	43,000
10. France	40,000

## Fastest-rising

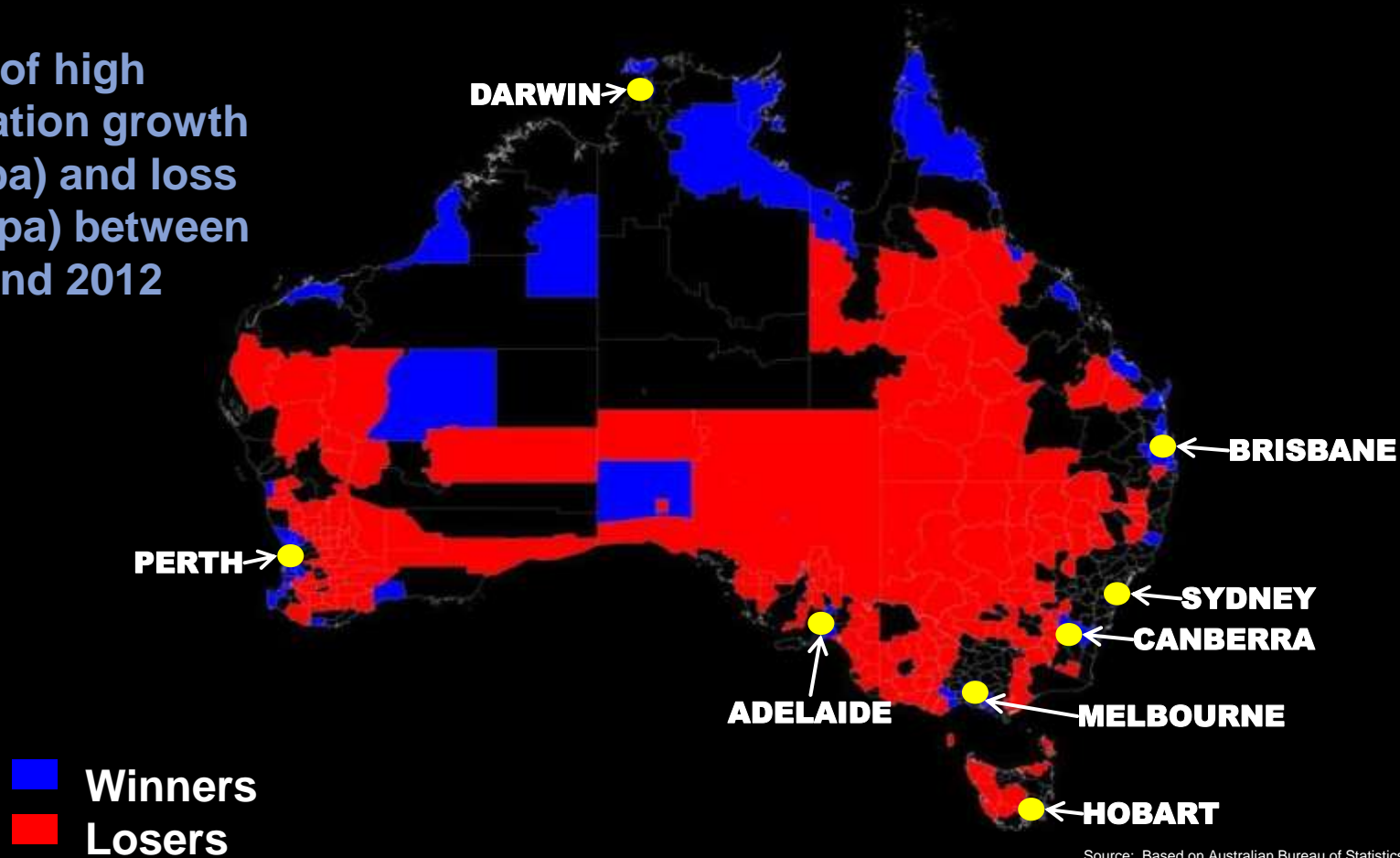
GDP > \$US500bn  
2002 - 2012 %

1. Russian Fed.	484%
2. China	466%
3. Iran	374%
4. Indonesia	349%
5. Brazil	347%
<b>6. Australia</b>	<b>288%</b>
7. Saudi Arabia	277%
8. India	255%
9. Turkey	239%
10. Norway	161%

## • Indicators of economic wealth for leading countries between 2002 and 2012

# We are a coastal people with a preference for coastal housing and lifestyle

Areas of high population growth (>2% pa) and loss (<-1% pa) between 1992 and 2012



# The Chinese and Indians are shaping Australia's ethnic mix

Country of Birth	2011	2006	% change
United Kingdom	1,101,100	1,038,200	6%
New Zealand	483,400	389,500	24%
China	319,000	206,600	54%
India	295,400	147,100	101%
Italy	185,400	199,100	-7%
Vietnam	185,000	159,800	16%
Philippines	171,200	120,500	42%
South Africa	145,700	104,100	40%
Malaysia	116,200	92,300	26%
Germany	108,000	106,500	1%

- **Top 10 ethnicities in Australia at the 2011 and 2006 Censuses**

# New acronyms for the new tribes of Australia

- **PUMCINS ....**  
Professional **U**rban **M**iddle **C**lass **I**n **N**ice **S**uburbs
- **NETTELS ...**  
Not **E**nough **T**ime **T**o **E**njoy **L**ife
- **KIPPERS ...**  
Kids **I**n **P**arents **P**ockets **E**roding **R**etirement **S**avings
- **LOMBARDS ...**  
Lots **O**f **M**oney **B**ut **A** **R**eal **D**ickhead

# In Sydney, non-English speaking migrants tend to cluster and can shape the demographics of a suburb

## 1. United Kingdom (182k)

- Manly 16%
- Fairlight 15%
- Queenscliff 14%

## 2. China (149k)

- Hurstville 36%
- Rhodes 28%
- Burwood 28%

## 3. India (88k)

- Harris Park 43%
- Westmead 32%
- Parramatta 24%

## 4. New Zealand (85k)

- Emerton 8%
- Claymore 8%
- Tregear 6%

## 5. Vietnam (70k)

- Cabramatta 35%
- Canley Vale 29%
- Cabramatta West 28%

## 6. Philippines (63k)

- Woodcroft 24%
- Plumpton 19%
- Rooty Hill 18%

## 7. Lebanon (55k)

- Mount Lewis 18%
- Punchbowl 16%
- Greenacre 15%

## 8. Italy (42k)

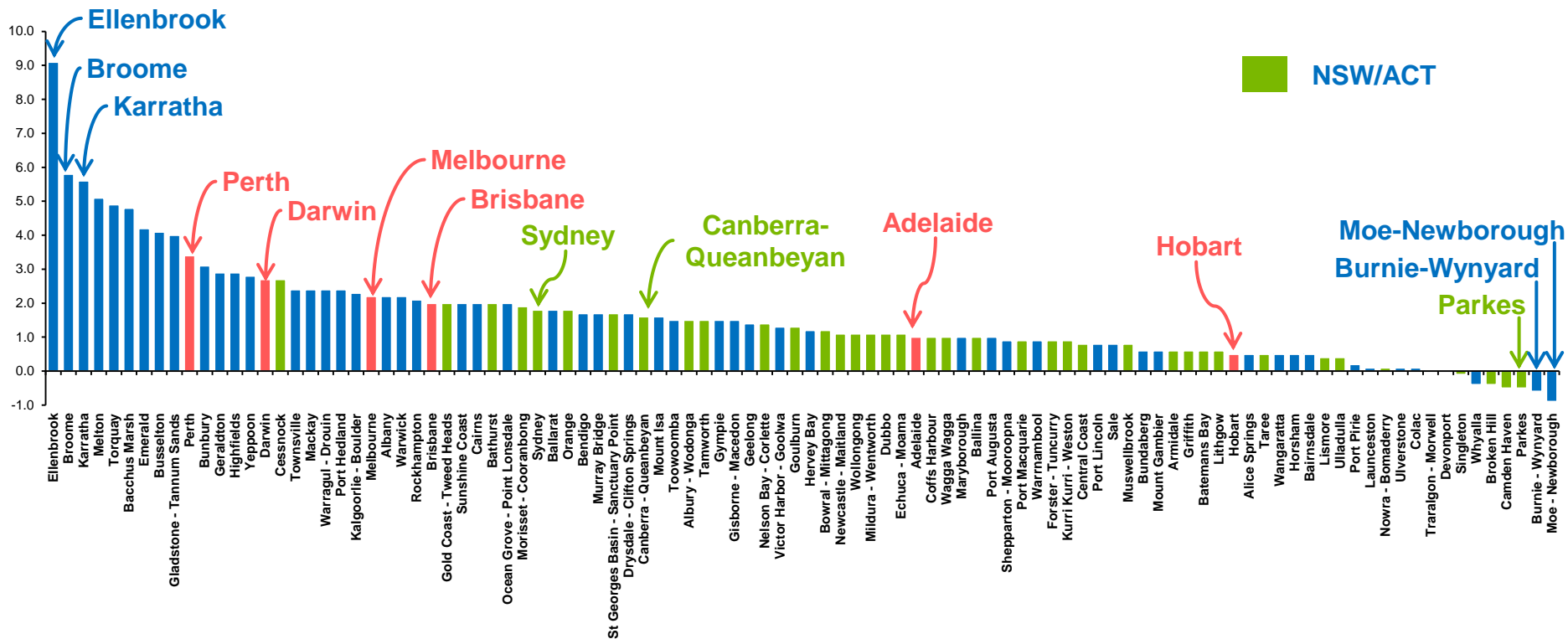
- Haberfield 15%
- Wareemba 13%
- Austral 13%

## 9. South Korea (40k)

- Rhodes 13%
- Newington 12%
- Meadowbank 11%

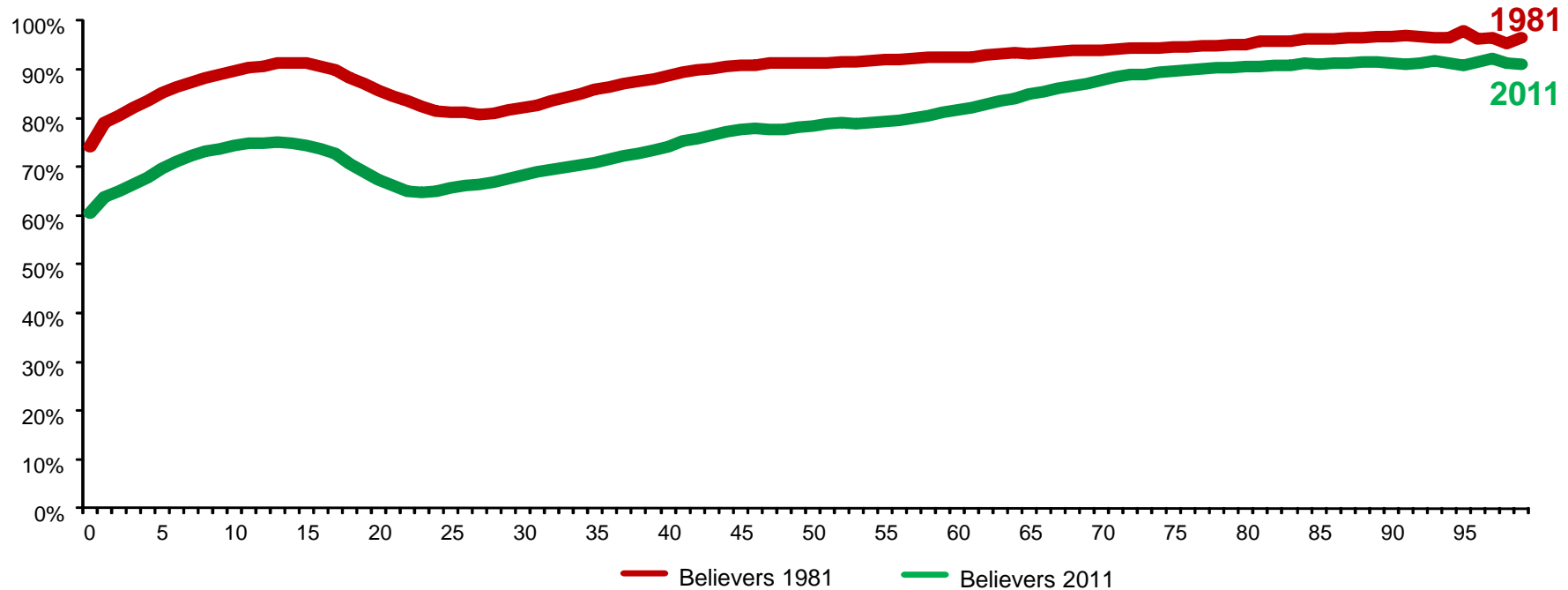
- Per cent concentration of selected nationalities in Sydney suburbs at the 2011 Census

# Commuter, resource and lifestyle towns are driving population growth and business opportunities



- Percentage growth in population over 12 months to June 2013 for the 100 largest significant urban areas (SUA) in Australia

# “Belief” is still important to the Australian community



- Percentage of population with religious affiliation between the 1981 and 2011 Censuses



# Sydney and Canberra are a patchwork of communities

## Median Weekly Family Income\*

• Forrest	\$3,560
• Longueville	\$3,240
• Barton	\$3,130
• Kurraba Point	\$3,070
• Birchgrove	\$3,060
• Deakin	\$3,020
• McMahons Point	\$3,010
• Point Piper	\$3,010
• Red Hill	\$3,000
• Claymore	\$640
• Australian avg.	\$1,480

## Proportion volunteers \*

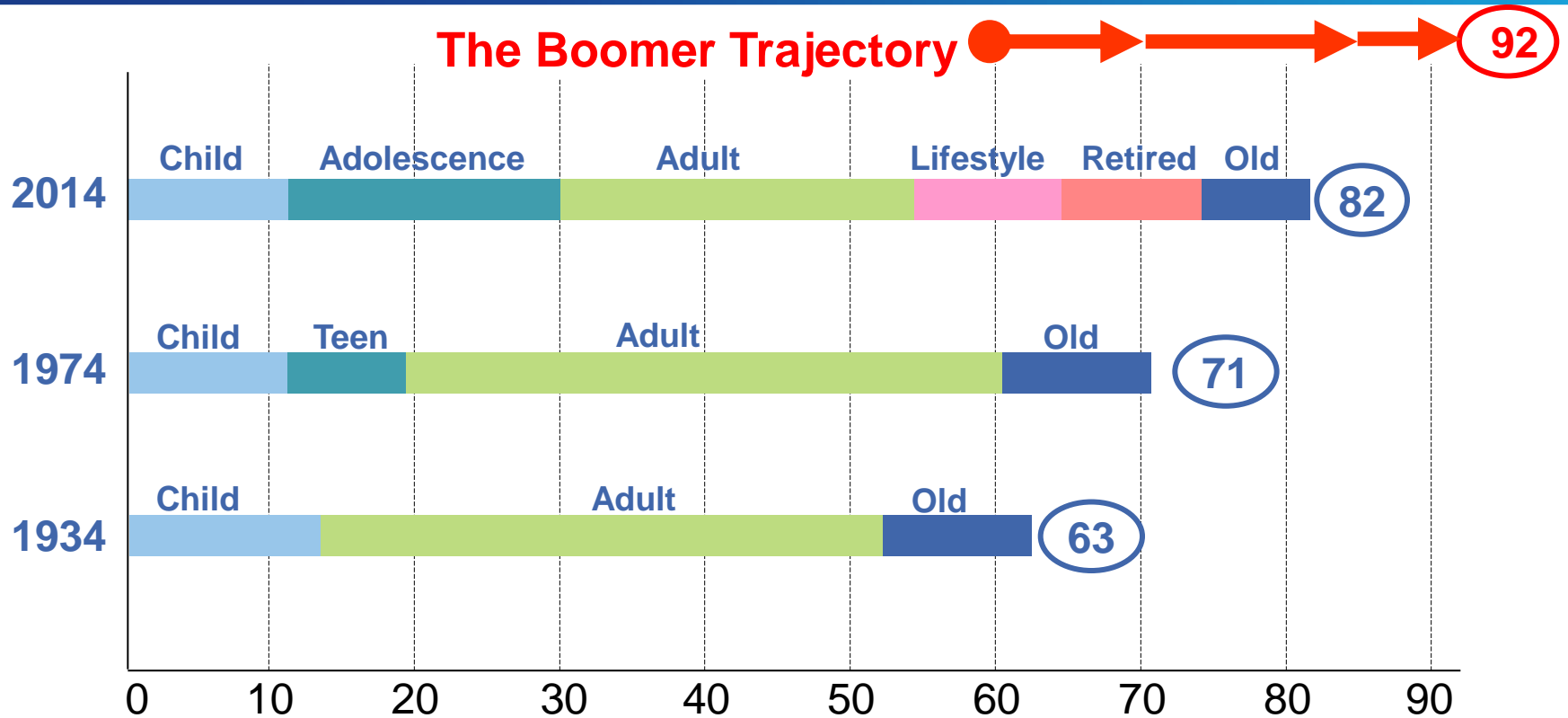
• Acton	41%
• Lane Cove	36%
• Longueville	35%
• Aranda	34%
• Denham Court	33%
• Cheltenham	32%
• Deakin	32%
• Chapman	32%
• Yarralumla	32%
• Cabramatta West	7%
• Australian avg.	19%

## Belief \*

• Horsley Park	97%
• Mount Lewis	96%
• Mount Vernon	96%
• Greenacre	95%
• Old Guildford	95%
• West Hoxton	95%
• Bossley Park	95%
• South Granville	95%
• Abbotsbury	95%
• Darlington	43%
• Australian avg.	75%

• Per cent comparison of selected social indicators in Sydney and Canberra at the 2011 Census

# Australians are dividing the lifecycle into 'thirds'



• **Change in life expectancy over 80 years in Australia**

# Baby Boomers and Generation Y set the demographic agenda ... although it is Generation X that is now in charge

## BABY BOOMERS

- Born 1950 – 1959
- Today 55 – 64
- Peak 2.8m in 1995
  - Hierarchical
  - Raised by Depression parents
  - Sandwich generation

## GENERATION X

- Born 1965 - 1974
- Today 41 - 50
- Peak 3.1m in 2010
  - Forgotten generation
  - Wrong place at the wrong time
  - Angsty about Ys

## GENERATION Y

- Born 1980 – 1989
- Today 25 – 34
- Peak 4.2m in 2025
  - Special ... Global
  - Chaotic connection
  - Entrepreneurial generation

## WAR BABIES

- Born 1935 – 1944
- Today 71 – 80
- Peak 1.8m in 1980
  - Command and control
  - Spiritual ... Anglo
  - Grey nomads

# Here's where 22 million Australians spent Census night

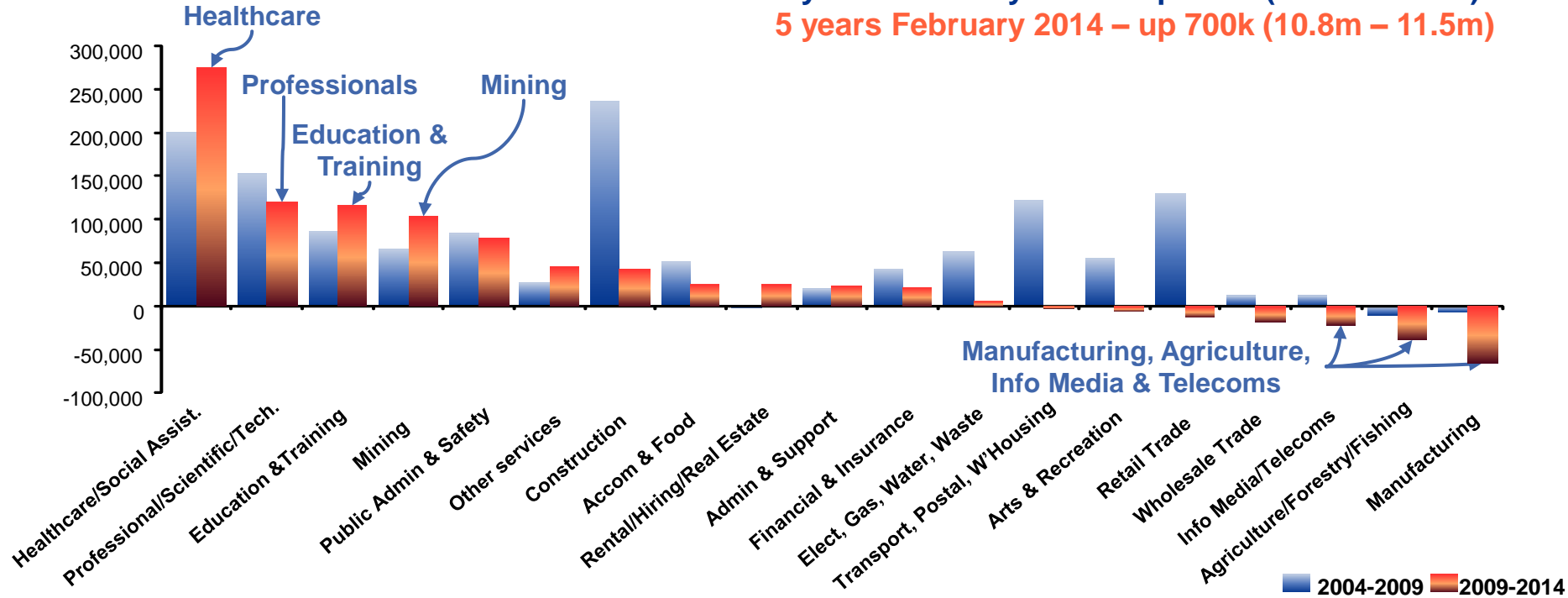
<b>Separate Houses</b>	<b>Apartments</b>	<b>Townhouses</b>	<b>Hotels, motels &amp; B&amp;Bs</b>	<b>Retirement villages</b>	<b>Caravan and camping parks</b>
16,714,000	2,111,000	1,664,000	265,000	155,000	146,000
<b>Nursing homes</b>	<b>Staff quarters</b>	<b>Residential Colleges</b>	<b>Aged care accommodation</b>	<b>Other &amp; non classifiable</b>	<b>Public hospitals</b>
129,000	96,000	57,000	50,000	41,000	41,000
<b>Attached to an office or shop</b>	<b>Prisons</b>	<b>Caravans, cabins and houseboats</b>	<b>Boarding schools</b>	<b>Boarding houses and private hotels</b>	<b>Private hospitals</b>
39,000	30,000	23,000	22,000	18,000	17,000
<b>Manufactured home estates</b>	<b>Improvised homes &amp; tents</b>	<b>Hostels for the disabled</b>	<b>Other welfare institution</b>	<b>Psychiatric hospitals</b>	<b>Homeless hostels and refuges</b>
16,000	13,000	10,000	8,000	7,000	5,000
<b>Immigration detention centres</b>	<b>Convents &amp; monasteries</b>	<b>Marinas</b>	<b>Nurses' quarters</b>	<b>Corrective institutions for children</b>	<b>Childcare institutions</b>
4,000	4,000	3,000	2,000	1,000	1,000

 Denotes accommodation up 20 per cent over previous census

## • Number of Australian population living in certain types of housing based on 2011 Census

# There has been a shift in the Australian economy ... away from manufacturing and towards healthcare and social assistance

5 years February 2004 – up 1.4m (9.4m – 10.8m)  
 5 years February 2014 – up 700k (10.8m – 11.5m)



- Net change in total jobs in Australia over two successive five-year periods, February 2004 – February 2014

# Australia is growing jobs in caring, selling, servicing, managing and “doing” ...

		Change 2006-2011			Change 2006-2011
		No.			No.
1.	Aged or Disabled Carer	30,800	11.	Teachers' Aide	13,900
2.	General Clerk	30,100	12.	Miner	13,600
3.	Child Care Worker	21,000	13.	Barista	13,400
4.	Electrician (General)	20,100	14.	Chef	13,100
5.	Checkout Operator	20,000	15.	Accountant (General)	13,000
6.	Accounts Clerk	17,600	16.	Carpenter	11,500
7.	Program or Project Administrator	16,000	17.	ICT Project Manager	11,500
8.	Office Manager	16,000	18.	Solicitor	11,400
9.	Truck Driver (General)	14,400	19.	Primary School Teacher	11,400
10.	Sales Assistant (General)	14,000	20.	Fitter (General)	10,700

- **Net change in employment by occupation in Australia over 5 years to 2011**

# ... but is contracting jobs in typing, assembling, farming, machining and “filling”

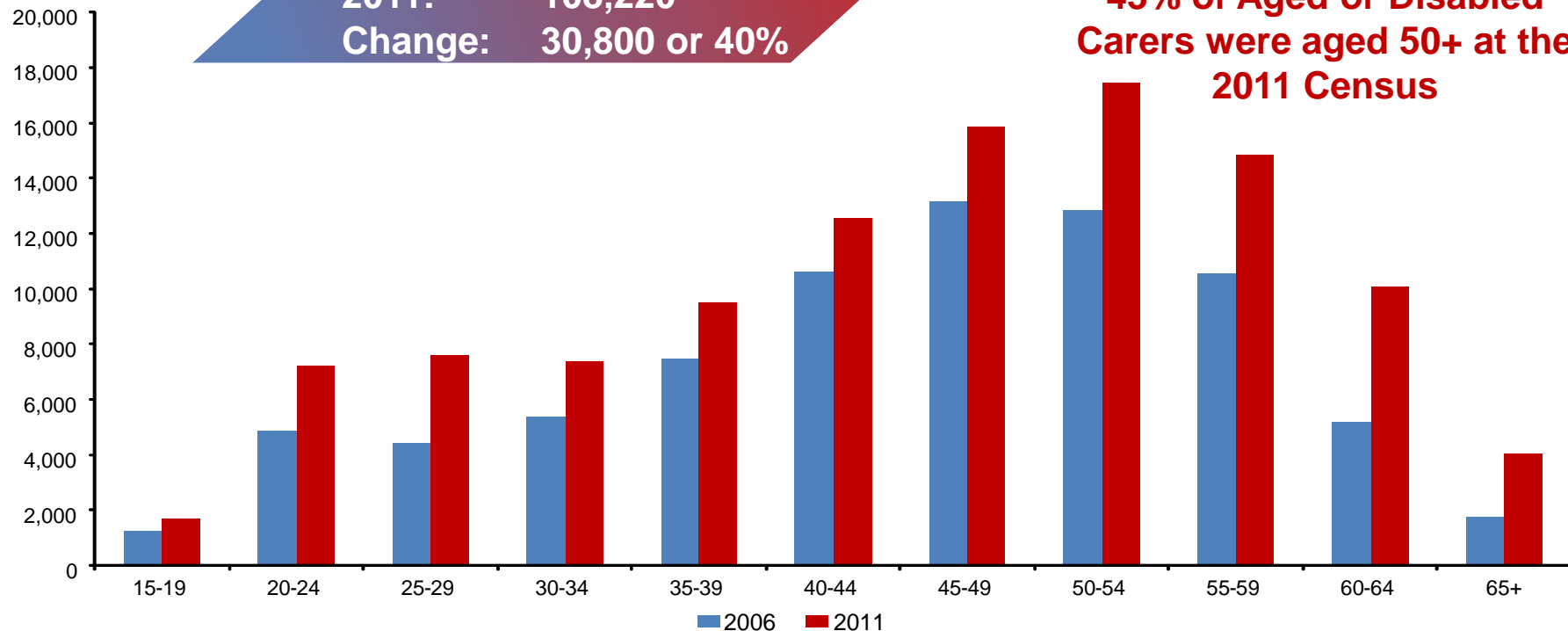
		Change 2006-2011			Change 2006-2011
		No.			No.
1.	Secretary (General)	-28,700	11.	Dairy Cattle Farmer	-3,000
2.	Corporate Services Manager	-14,400	12.	Sewing Machinist	-2,600
3.	Product Assembler	-7,800	13.	Safety Inspector	-2,500
4.	Mixed Crop & Livestock Farmer	-6,600	14.	Switchboard Operator	-2,500
5.	Shelf Filler	-6,400	15.	Mixed Livestock Farmer	-2,400
6.	Medical Laboratory Technician	-5,500	16.	Credit or Loans Officer	-2,200
7.	Office Cashier	-4,700	17.	Residential Care Officer	-2,200
8.	Metal Engineering Process Worker	-4,500	18.	Analyst Programmer	-2,100
9.	Real Estate Representative	-3,500	19.	Integration Aide	-2,000
10.	Vineyard Worker	-3,100	20.	Telecommunications Technician	-1,900

- **Net change in employment by occupation in Australia over 5 years to 2011**

# Aged or Disabled Carers have increased ... but there is still a need to attract a younger workforce to offset their soon-to-be-retiring colleagues

2006: 77,410  
2011: 108,220  
Change: 30,800 or 40%

43% of Aged or Disabled Carers were aged 50+ at the 2011 Census



## • Age profile of Aged or Disabled Carers between the 2006 and 2011 Censuses

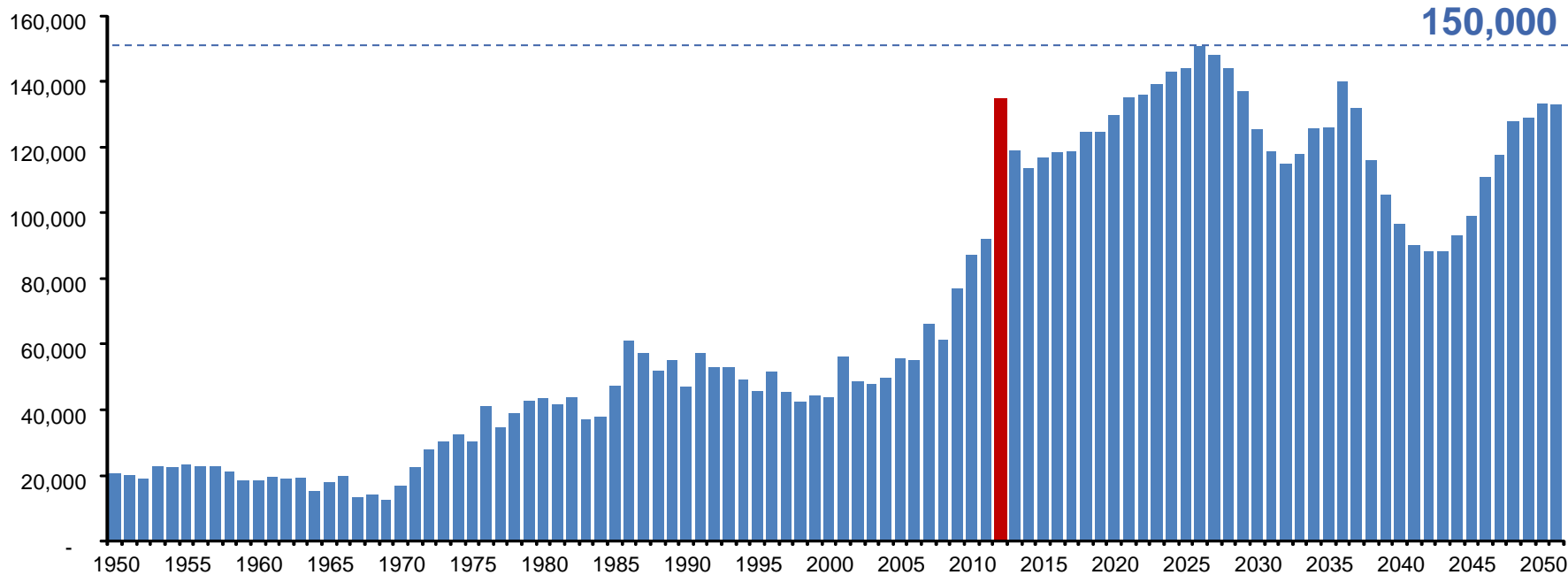


# Boomers set to “tip” beyond work and into the lifestyle stage of the lifecycle

1950

2000

2050



• Net growth in population aged 65+ over 100 years in Australia

# Common themes in the corporate world and in the community

## Corporate

1. **'More for Less' ... customers want you to deliver more and to pay you less**
2. **Competition from left field ... often associated with new technology**
3. **Globalisation ... new players discovering Australia**

## Community

1. **Celebration of the individual ... rights, entitlements ... minorities**
2. **Loss of faith in institutions ... church, unions, big business, politicians, not sure about public sector**
3. **Consequential rise of the need for transparency, accountability, apology and regulation**



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