



Redland City  
**Draft Economic  
Development Strategy**

July 2014

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# Redland City Draft Economic Development Strategy

## 1. Document overview

This document provides an overview of the Redland City economy, with data from the last census, along with the 2001 and 2006 census data as a way of developing a robust analysis of the city's economic growth over the last decade. This is important as it highlights some key trends occurring in the city's different industry sectors, as well as labour market trends that will have ramifications for the city's economy moving to 2041.

The data has been obtained from a range of sources including but not limited to the Australian Bureau of Statistics, the Department of Employment, Queensland Treasury and Trade, The Australian Workforce and Productivity Agency, the National Institute for Economic and Industry Research and Deloitte Access Economics Industry Trends reports. In addition, SiS Consulting has undertaken an extensive review of a number of key Council documents, including the Rural Futures Strategy, the Centres and Employment Strategy Review by Urbis (2013), the previous Economic Development Strategy and the Tourism Strategy. These have all been compiled as part of a separate research compendium that will accompany the Economic Development Strategy as a supporting document.

At present future industry and employment growth forecasts (to 2041) are still awaiting final modeling analysis and forecasts being prepared by Queensland Treasury and Trade and the Council of Mayors small area labour forecasts being undertaken by the National Institute for Economic and Industry Research. Once these analyses are made available to Council they will be factored into the Economic Development Strategy future growth forecasts for industry and employment.

The following themes are the proposed framework for the Draft Strategy, they are not necessarily indicative of the strategy's final structure. This document is seeking input into the city's economic direction to 2041, please review the information and provide input.

## 2. Foreword from the Mayor

Redland City's Economic Development Strategy provides clear direction for business growth and job generation. Rather than taking an ad hoc approach to economic development the Strategy identifies health, education, tourism, niche manufacturing and construction industries as areas of focus. It calls for close collaboration between businesses as the key to reaping the greatest benefits - for business and for the Redlands community.

The Strategy is designed to deliver and measure positive growth for local businesses and the employment opportunities that will flow from this new level of collaboration. Quite simply, this is businesses' strategy for business. It unashamedly encourages new businesses to establish in the Redlands. New business means new jobs for Redlanders.

The Strategy will not only facilitate better business outcomes, but also put Redland City on the map as the best place to live, work, do business and invest.

### 3. Introduction

Redland City covers an area of 537 km<sup>2</sup> and is located approximately 29 kilometres from the Brisbane CBD. The city is ideally positioned on the doorstep of Asia and the Pacific Rim, with access to major transport corridors in South east Queensland and located just 28 kilometres from Brisbane Airport and 25 kilometres from the Port of Brisbane.

There are two Principal Activity centres in the city, namely Cleveland and Capalaba, with Victoria Point consolidating its role since the last census as a Major Activity hub for the southern portion of the city, with 26% growth in employment (Urbis, 2013)

The city has enjoyed sustained business growth across a number of sectors since the 2008 strategy, most notably in Professional, Scientific and Technical Services, Financial and Insurance Services, Health Care and Social Assistance, Electricity, Gas, Water and Waste Services.

Redland City Council aims to build on this growth by leveraging the unique characteristics of our city in order to build our economic capacity and deliver prosperity for our city and its residents. We take great pride in the qualities that make our city an attractive place to live and we want to enhance our city's economic capacity by also making it an attractive place to do business.

This strategy aims to align with our "open for business" philosophy and together with our economic vision and mission statements will focus activities on the development of initiatives that increase the economic capacity of our city.

While this economic development strategy is Redland City wide, council acknowledges the need to develop specific strategies and plans for North Stradbroke Island and the Southern Moreton Bay Islands due to their unique characteristics.

#### 3.1 Council's Strategic Economic Direction

Redland City Council aims to leverage the unique characteristics of our city in order to build our economic capacity and deliver prosperity for our city and its residents.

We take great pride in the qualities that make our city an attractive place to live and we want to enhance our city's economic capacity by also making it an attractive place to do business.

Our focus is the development of key industry sectors that can deliver economic growth and enhance the liveability of our city through increased employment opportunities, training and skills development for our city's workforce, infrastructure development, investment attraction and an overall increase in the city's economic capacity.

Redland City's strategic economic direction will state that:

***Redland City will be a destination of choice for business through a culture of innovation and creativity that encourages the development of employment generating enterprises creating opportunity and prosperity for the city and its residents.***

## **Redland City Council's Role**

*To enhance the economic development of the City by facilitating the attraction, retention and development of businesses in key sectors, leveraging our competitive advantages including lifestyle and geographic location.*

### **3.2 Current state of the economy**

#### **I. GRP**

The Redland City economy's Gross Regional Product (GRP) was \$4,392m in 2012, up from \$4,352m in 2011, or 1.6%. The overall trend has been down on growth from previous years and comparative to the Queensland economy as a whole which grew by 3.1% during the same period (NIEIR, 2013).

Key indicators include imports and exports from the city, where exports include all sales of goods and services to non-resident households, businesses and organisations outside the city's boundaries and imports includes the sale of goods and services from industries to resident households, businesses and other organisations in the city.

Mirroring state and national trends, Redland City has a deficit of imports over exports. Statistics show that manufacturing was the largest exporting sector in the city accounting for 44% of the city's exports. It was also the largest importer with nearly 34% of all imports into the city. Table A2 provides the total dollar figure of the city's exports and imports from 2011/12.

#### **II. Employment (Internal & External)**

The largest employer in Redland City by sector is Healthcare and Social Assistance, closely followed by Retail, which combined employ nearly 29% of the city's workforce. The next largest employer is Construction (11.7%), followed by Education and Training employing 9.8% of the city's workforce (ABS, 2011).

Combined, these four sectors employ half of the city's workforce, with all but Retail experiencing employment growth since 2006. The strongest growth occurred in the Healthcare and Social Assistance sector, with employment rising by nearly 5% of the city's workforce since 2006 (NIEIR, 2013).

Employment growth was more subdued across other sectors of the local economy, with declining employment experienced across a number of sectors (other than retail), including Wholesale Trade, Agriculture, Forestry and Fishing, Public Administration and Safety. Overall, however the city's total employment to 2011 grew by nearly 5000 from 2006 figures (NIEIR, 2013). This is highlighted in table A3.

#### **III. Population**

The city is home to an estimated resident population of 145,507 people in 2012, up from 136,771 since the release of the last Economic Development Strategy in 2008 and up from 115,832 since 2001 (Australian Bureau of Statistics. 2012). Population growth in the city since 2001 has averaged 2.1%; however, growth has slowed considerably since 2009 averaging 1.3% over that period. This trend is in line with the state growth rates over the

same period, with the state also experiencing below average population growth from 2009. This has had implications for demand driven industries that are reliant on population growth such as construction and retail.

The declining population growth rate has serious implications for the city's economy and if the downward trend continues, it will impact on the residential construction sector in particular, which is largely driven by population growth. In addition to the construction sector, lower population growth will have implications for the city's retail sector, with spending in this sector is also dependent on population growth as well as disposable and discretionary income which will also affect spending patterns.

#### **IV. Key sectors value -add (GRP)**

The measurement of the city's GRP is most accurately quantified through value-add, rather than total output by industry. Value-add provides an indicator of how productive an industry is, as it factors input expenditure into the final output figure, highlighting those industries that may have high input costs and hence are not as productive.

The Redland City economy is dominated by 9 key industry sectors that account for 75% of the city's total output and GRP, providing the city with a moderately diverse economy within Southeast Queensland. These nine sectors in turn however, are dominated by four sectors that are generating almost half of the city's economic output and value-add and with the exception of manufacturing are population serving and driven by population growth. The nine sectors in order of GRP contribution are:

1. Construction
2. Retail
3. Manufacturing
4. Healthcare and Social Assistance
5. Wholesale Trade
6. Education and Training
7. Professional, Scientific and Technical Services
8. Financial and Insurance Services
9. Transport, Postal and Warehousing

#### **V. UQ Business Survey**

This study was initiated through the University of Queensland Business School. Discussions between the University researchers, Redland City Council and the Chamber of Commerce revealed a need for Redlands to focus efforts on maturing the economy to generate wealth and high-value employment. The ultimate goal was to have a self-sustaining economy rather than just a dormitory suburb of Brisbane.

While this goal is clear, the means to achieve it are not. A previous strategic plan had a long list of actions but to execute all of these would require time and resources beyond those available to Redland City Council. The objective of the present study was to find the most significant levers for economic growth that were in the domain of council.

The conclusions from the survey, which was based around best practice outcomes from the Queensland Innovation survey, the Brisbane City Innovation survey and research from the United Kingdom and the United States, were that the post GFC years have been challenging for local businesses. In addition it found that local government has little control over these exogenous factors, however there were three key areas that Council can play a role in the economic development of the city.

The three areas are:

- I. High performance internet – Redlands is behind in the digital economy and needs to catch up to retain its best businesses
- II. Planning to support business growth – need to ensure sufficient office and business space and road arteries that access key areas in SEQ
- III. Two-way communication with growth businesses – identify high growth firms and large employers. Keep lines of communication open in order not to lose the firms at key growth cycles.

The report recommended that Council concentrate on growing existing businesses in the city, rather than developing a strategy of trying to attract new businesses, though it was agreed that an investment attraction plan is an important piece of the economic puzzle.

### **3.3 Future State - Key Growth Objectives**

Four key growth measures which provide the broad economic objectives to 2041

- I. Population Target**  
1.2% annualised average growth (annualised average between 2003 and 2013 was 1.8%)
- II. Number of jobs**  
60% self-containment target
- III. GRP growth**  
Averaging 3% pa to 2041. Council's ability to influence GRP is limited; however it can do so through the following levers:
  - Increase government consumption
  - Facilitate exports
  - Investment attraction
  - Leveraging from the connectivity to the South East Queensland economy
- IV. Tourism growth**  
A target of 2% of total economic output, which is less than the Australian average (Dept. of Resources, Energy and Tourism, 2014), however above trend growth for the sector in the city over the last decade.  
  
Tourism is currently 1.4% of total output; the Australian average is 3% of the economy's output. It is a sector where growth is dependent on the strength of the broader economy

as well as infrastructure development, amenity improvement and investment attraction to expand existing products and develop new ones.

### **3.4 Future State - Key industry sectors**

Based on current economic output, industry trends, future growth opportunities and council's economic vision, this draft strategy identifies the following industry sectors as drivers of growth. Separate Action Plans will be developed for these sectors based around the key objectives of the strategy. The purpose of these Action Plans is to deliver the Strategy at an operational level. The Action Plans will be developed around the following sectors:

1. Construction
2. Education and Training
3. Financial and Insurance Services and Professional services
4. Healthcare and Social Assistance
5. Niche Manufacturing
6. Retail
7. Tourism

It is important to note that future growth in population (or demand driven) sectors such as construction, Education and Training, Healthcare and Social Assistance and Retail will potentially be curtailed by lower projected population growth to 2041. In order to meet average annual GRP growth of 3% to 2041 the city will need to substantially lift export oriented and value-add industries, and/or aim for higher population growth.

Further analysis of these forecasts will be undertaken after the release of data from Queensland Treasury and Trade is made public, along with internal small area employment forecasts currently being undertaken by the Council of Mayors South East Queensland.

## **4. Overview of the integrated approach to achieving the vision:**

Redland City Council understands that developing partnerships will be the key to ensuring the success of our economic development strategy. In particular, strong partnerships with the business community are a critical element in developing the economic capacity of our city. We embrace an integrated approach to economic development through an engagement framework that incorporates the key elements of the economic development strategy:

- stakeholder partnerships
- key industry sectors
- sustainable environment
- planning & infrastructure
- lifestyle and community wellbeing.

Engagement and activities in these focus areas are driven and monitored by the Economic Development Advisory Committee and the RCC Project Team. This engagement framework will not only assist in increasing the economic capacity of the Redlands by aligning activities with Council's economic vision, it will also ensure that

Council’s mantra for the Redlands, “Lifestyle, a great place to live, work and play”, is at the forefront of economic development decisions.

#### **4.1 Business, Community, Federal/State partnerships**

It is recognised that the implementation of the Economic Development Strategy will require active engagement with key stakeholders.

In addition, the draft strategy also recognises that partnerships are an integral part of any successful strategy because they define the roles and responsibilities of the key stakeholders and require the development of collaborative frameworks to drive actions and activities.

Partnerships are an integral part of any successful strategy because they define the roles and responsibilities of the key stakeholders and require the development of collaborative frameworks. These partnerships are defined as a relationship between key groups that is characterized by mutual cooperation and responsibility, for the achievement of a specified goal, that is, increasing the economic capacity of the Redlands.

While there are a number of stakeholders, from an economic development perspective, one of the key partnerships that will need to be developed is with the business community. Any growth in the economic capacity of the Redlands will come from investment in key industry sectors.

In order to obtain support and “buy in” from the local business community, the draft Economic Development Strategy proposes the formation of an Economic Development Board, to be made up of members from each of the key industry sectors as well as an independent chair and a council representative.

The Draft Strategy also proposes to establish an economic development project team responsible for implementing any action plans that fall out of the ED strategy, as well as being the link to federal and state bodies and community groups.

Figure 1 below is a representation of the Economic Development Strategic Engagement Framework. At the centre of all activity is the city’s strategic economic direction which links all of the elements of the strategy.

Figure 1: Draft Economic Development Strategic Engagement Framework



## 4.2 Economic Development Advisory Committee Structure

The strategy recognises that the success of the new EDS will in part depend on the relationship between Council and the business community. In order to strengthen that relationship and develop a partnership between Council and the business community, the Draft Strategy is proposing to establish an Economic Development Advisory Committee made up of representatives from each of the seven key identified industry sectors identified for future growth in the city.

The Economic Development Strategy proposes that the committee will oversee the implementation of the economic development strategy, including specific actions plans, and provide advice to the Mayor and Councilors on its progress and any necessary changes in order to enhance the success of the strategy. The Draft Strategy recommends that this committee act only in an advisory capacity and that control of any budget associated with the city's economic development (including tourism) remain with Council.

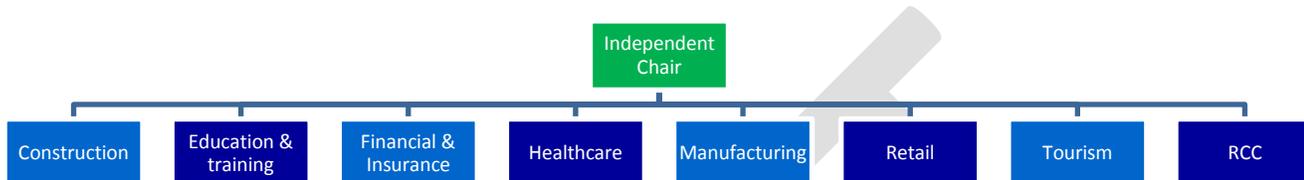
The committee will also act as the link between Redland City Council and the seven key industry sectors identified in the Draft Strategy, with the aim of developing partnerships that allow for the development of initiatives to drive economic growth.

The Economic Development Strategy proposes that the Committee's role will be to:

- Oversee the implementation of the Draft Economic Development Strategy;
- Assist with the development and implementation of key industry action plans;
- Review and report on the progress of the Draft Economic Development Strategy and associated action plans and ensure their alignment to the goals and objectives of the Draft Economic Development Strategy;
- Advise Redland City Council on any necessary adjustments to the Draft Economic Development Strategy based on industry or economic trends, opportunities and or threats.
- Act as the link between Council and the key industry sectors and ensure open two way communication between the public and private sectors.
- Actively promote the city as a great place to do business.
- Partner with Council to attract investment into the City, including lobbying the State and federal Governments on key initiatives and projects.

Figure 2 below provides a diagrammatical representation of the proposed Committee Structure, as recommended by this Draft Strategy.

Figure 2: Economic Development Advisory Committee Structure



### 4.3 Sustainable environment

Currently over 50% of the area of the Redlands is protected in order to conserve important natural and cultural assets. The Draft Strategy recommends that Redland City Council is firmly committed to the principles of sustainable environment and aims to develop a wide range of plans which embody these principles.

This commitment to environmental sustainability is set against an economic development vision that aims to increase the economic capacity of the Redlands and improve the economic wellbeing of its residents.

The Draft Strategy is proposing that Redland City Council aims to find a balance between the economy and environmental sustainability by measuring economic initiatives against its principles of sustainable environment.

### 4.4 Planning & Infrastructure

Ensuring the facilitation of initiatives to drive economic development will largely be dependent on Council's planning scheme and the development of the required infrastructure to drive an increase in economic capacity.

Redland City's Draft Economic Development Strategy recommends that Redland City Council aims to ensure that planning supports the economic development vision while at the same time maintains the critical balance between environmental sustainability, lifestyle and community wellbeing.

The Draft Strategy is proposing that investment in infrastructure will be measured against economic returns as well as, environmental sustainability impacts and community wellbeing.

#### **4.5 Lifestyle & community wellbeing**

There are five key elements to sustainable community development, these are; the levels of service, local economy, environment, society and culture.

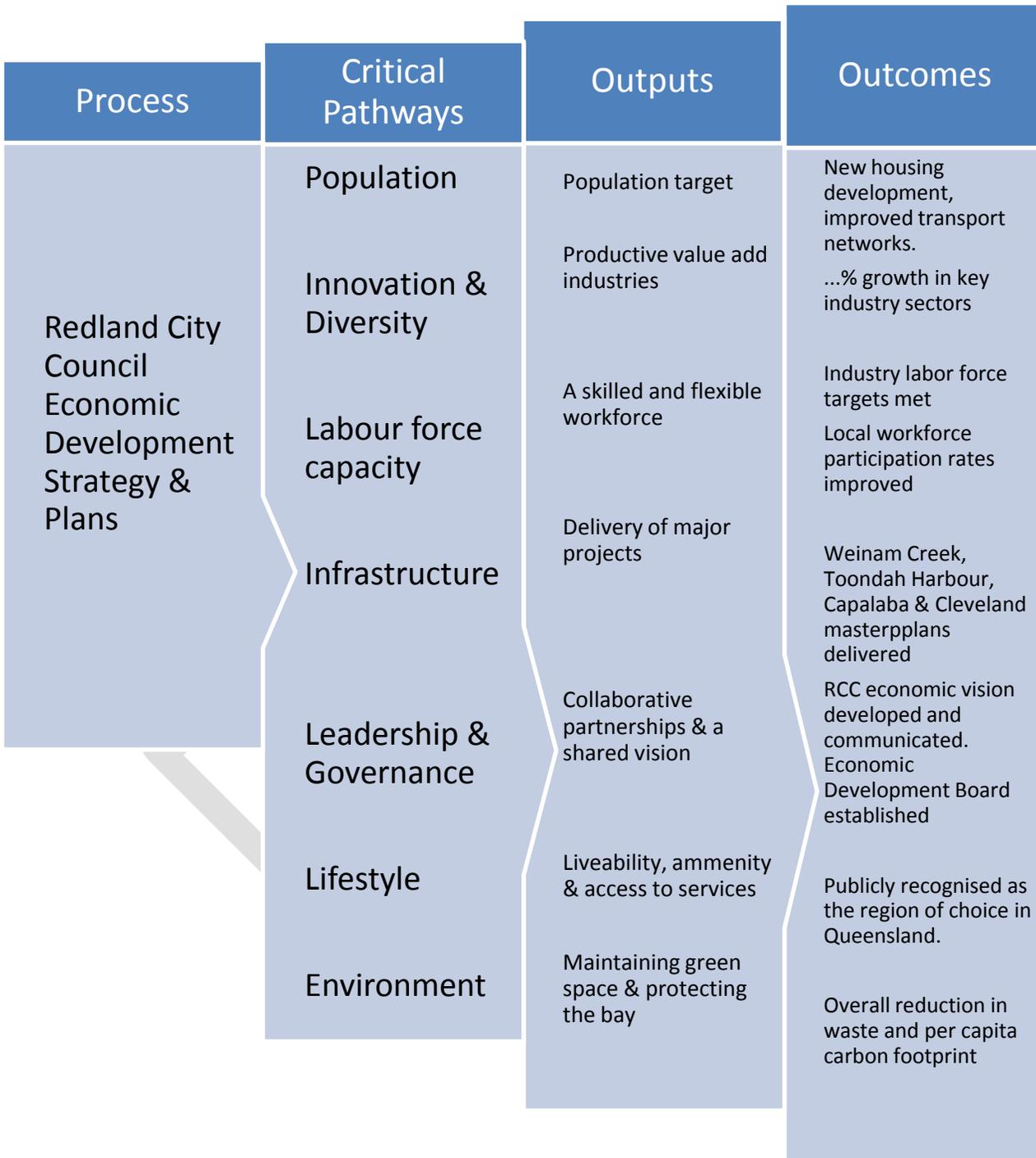
While this economic development strategy focuses on improving the economic capacity of Redland City and increasing GRP, it will also directly and indirectly impact on the other three areas of community development.

Redland City Council is committed to ensuring that improvements in economic capacity are linked to improved lifestyle outcomes for our city which subsequently improve community wellbeing.

### **5. Strategy Implementation Framework**

Ensuring the effective implementation of the Draft Economic Development Strategy and associated action plans is critical. Previous strategies have not been effective because they lacked the outcome focused approach taken in this Draft Economic Development Strategy. The framework represented in Figure 3 is a roadmap for ensuring the delivery of key outcomes in the Draft Strategy. It highlights the need to focus on outcomes that link to the critical pathways and can be tracked and measured. Figure 3 outlines the proposed implementation framework for the Draft Strategy.

Figure 3: Draft Strategy Implementation Framework



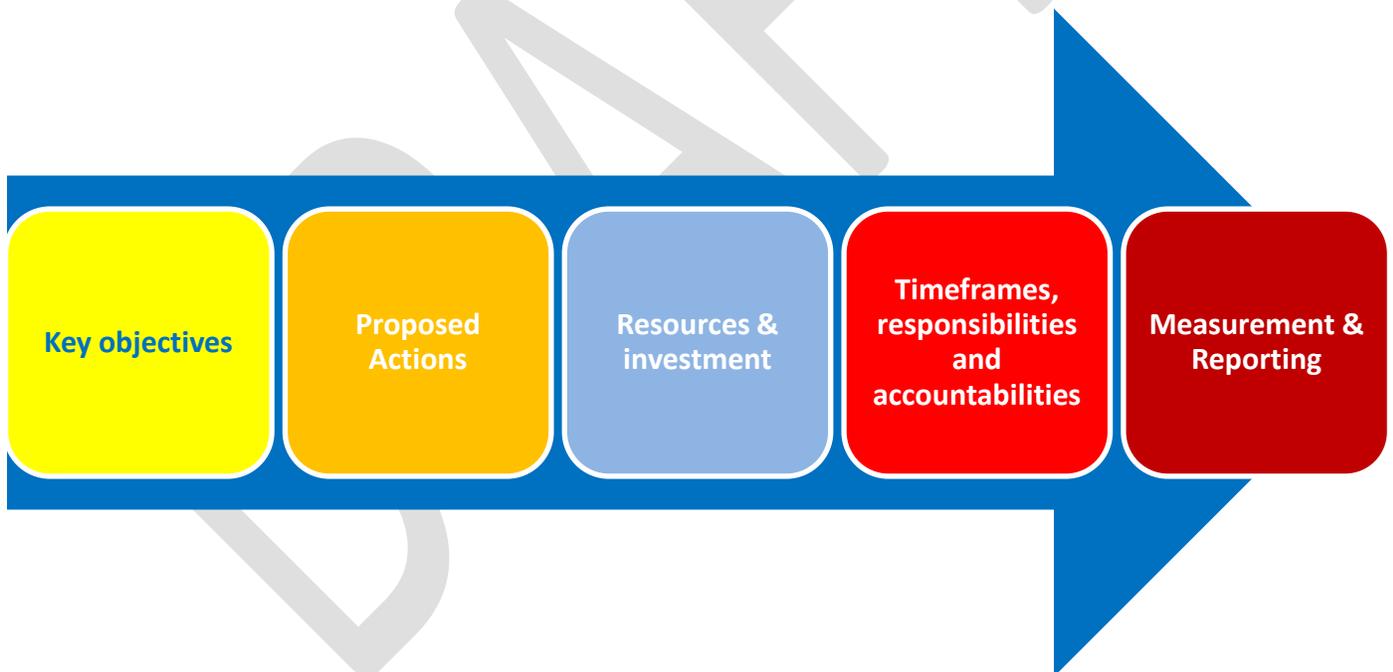
## 5.1 Action Plans

The success of the EDS will largely be dependent on the activities that facilitate growth in the identified key industry sectors of the Redland's economy. Each identified key industry sector will require a specific action plan detailing the initiatives and activities that will be undertaken in order to achieve key growth objectives as well as the level of investment required.

The action plans will be used to drive activity, monitor progress and report on outcomes. Figure 2 below outlines the framework that will be used to develop each detailed action plan.

They will be "live" plans, meaning that they will be actively monitored and adjusted as changes to the economy and industry sectors are detected and assessed. An action plan template has been developed and will be populated for each key industry sector, see Appendix B.

Figure 4: Industry Sector Action Plan Framework



## 6. Strategy Implementation

The Strategic Engagement section of this strategy outlines the importance of partnerships to the success of the Draft Economic Development Strategy implementation. The Draft Strategy is recommending that Redland City Council recognises the need to work collaboratively with the city’s business community in order to provide leadership and direction.

### 6.1 Roles and Responsibilities

The key objectives outlined in the Draft Economic Development Strategy and the action plans associated with them, will require Council and the City’s business community to work together to ensure their success. Clearly articulating the roles and responsibilities of each partner will assist in the management of the relationship and enhance the likelihood of success.

Figure 5: Proposed roles of Redland City Council and the business community

Redland City Council	Redlands Business Community
<p>Ensure the planning scheme supports the development of the key industry sectors outlined in the ED strategy</p>	<p>Work with RCC to develop a strong partnership focused on the economic development of the city.</p>
<p>Facilitate business growth by ensuring processes are streamlined and red tape reduced. Continue to work with business to identify further improvements.</p>	<p>Support and encourage growth in the identified key sectors through collaborative partnerships.</p>
<p>Ensure that all of council, top to bottom, as well as external stakeholders, understand the ED objectives and their role in facilitating its implementation.</p>	<p>Support the Economic Development Board by encouraging local business leaders to nominate for board positions. Work collaboratively with the board to develop key sector growth plans.</p>
<p>Drive initiatives to attract investment into the city, particularly in the key sectors outlined in the strategy, education, tourism and health.</p>	<p>Work with RCC to actively promote Redland City’s as “open for business” Identifying opportunities to value add to the city’s economy thorough industry supply chain expansion.</p>
<p>Facilitate local businesses’ access to support programs that enable growth.</p>	<p>Co-invest with RCC in the establishment of a business support program aimed at encouraging investment in the identified key industry sectors.</p>

## **7. Resourcing and Investment**

Strategies required by Council employees to oversee the draft strategy's implementation will need to include, but not be limited to:

- I. Attracting Investment
- II. Encourage innovation/Value-add
- III. Skill development
- IV. Lifestyle promotion/perception changing
- V. Securing funds/Collaborative partnerships

## **8. Review process**

The review mechanism for the implementation of the strategy to ensure its success will include the following mechanisms

- I. Reporting and tracking against key objectives
- II. Accountability for document – outline where accountability for outcomes lies both within and outside Council
- III. Operational review of strategy by 2019

## Appendix A: Key Economic Indicators

### A1: Redland City GRP

Table 1: GRP Redland City 2001-2012

	Redland City	
Year (ending June)	GRP \$m	% change from previous year
2012	4,392	+1.6
2011	4,325	+3.5
2010	4,179	+1.8
2009	4,105	+0.5
2008	4,087	+3.9
2007	3,932	+4.4
2006	3,767	+4.8
2005	3,595	+5.4
2004	3,410	+4.2
2003	3,271	+4.6
2002	3,126	+6.2
2001	2,943	

### A2: Redland City Imports and Exports

Table 2: Redland City Exports and Imports 2011/12

	2011/12	\$m
Exports		1,190.1
Imports		4,354.8

## A3: Redland City Employment by Industry

Table 3: Employment by Industry

Redland City			
Industry	Number	%	2006/07 to 2011/12
Agriculture, Forestry and Fishing	478	1.1	-86
Mining	321	0.7	-10
Manufacturing	3,198	7.1	+223
Electricity, Gas, Water and Waste Services	266	0.6	+33
Construction	5,280	11.7	+603
Wholesale Trade	1,336	3.0	-100
Retail Trade	6,531	14.5	-533
Accommodation and Food Services	3,936	8.7	+697
Transport, Postal and Warehousing	1,423	3.2	-16
Information Media and Telecommunications	532	1.2	-74
Financial and Insurance Services	821	1.8	+112
Rental, Hiring and Real Estate Services	1,131	2.5	+44
Professional, Scientific and Technical Services	2,192	4.9	+192
Administrative and Support Services	1,936	4.3	+381
Public Administration and Safety	1,644	3.7	-33
Education and Training	4,424	9.8	+986
Health Care and Social Assistance	6,563	14.6	+1,979
Arts and Recreation Services	809	1.8	+167
Other Services	2,174	4.8	+359
<b>Total Industries</b>	<b>44,996</b>	<b>100.0</b>	<b>+4,923</b>

## A4: Redland City Value-Add by Industry

Table 4: Value-Add by industry sector

Redland City - Constant prices			
Industry	\$m	%	2006/07 to 2011/12
Agriculture, Forestry and Fishing	54.7	1.5	+26.1
Mining	56.5	1.6	+1.2
Manufacturing	379.7	10.6	+3.3
Electricity, Gas, Water and Waste Services	46.8	1.3	-1.4
Construction	446.2	12.5	-7.6
Wholesale Trade	254.8	7.1	-14.4
Retail Trade	380.6	10.6	+60.9
Accommodation and Food Services	129.5	3.6	-8.7
Transport, Postal and Warehousing	164.7	4.6	+7.9
Information Media and Telecommunications	97.8	2.7	+33.7
Financial and Insurance Services	213.7	6.0	+36.5
Rental, Hiring and Real Estate Services	137.4	3.8	+13.2
Professional, Scientific and Technical Services	224.1	6.3	+36.6
Administrative and Support Services	105.3	2.9	+12.3
Public Administration and Safety	152.8	4.3	+10.8
Education and Training	238.5	6.7	+27.9
Health Care and Social Assistance	366.2	10.2	+96.0
Arts and Recreation Services	20.9	0.6	+3.4
Other Services	104.4	2.9	+19.8
<b>Total Industries</b>	<b>3,574.8</b>	<b>100.0</b>	<b>+357.4</b>