

Snapshot Social Infrastructure as Property Asset Class

Social infrastructure is a broad and diverse asset class. This data only takes into account non-government education and health assets, however, social infrastructure also includes sport and recreation, culture, community support, emergency services assets, and much more.

Social infrastructure employs nearly 10% of South East Queensland's labour force, and directly accommodates the needs of some 2 million people.



Where does Social Infrastructure fit within SEQ's property landscape?

CURRENT CAPITAL INVESTED



Social infrastructure
assets are valued at almost
\$40 billion



Newly seeded funds
are estimated to represent
**\$10.5 billion in
managed assets**



In the 2019/20 financial year, some
\$2.1 billion in capital expenditure
was attributed to 82 Ministerial Infrastructure
Designations, including 51 schools and two hospitals.

many of which include weighted
average lease expiries of
between 10 and 20 years
compared to the largest office,
industrial and retail weighted
average lease expiries which are
generally **below 5 years**.

KNOWN PIPELINE VALUE



Non-government
health and education
projects represents
an estimated value of some
\$4.5 billion

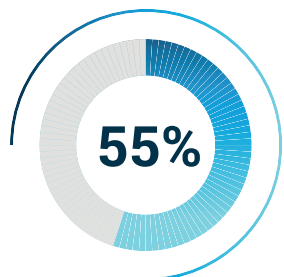


There is currently
\$3 billion
worth of new
education
infrastructure
across 127 projects.

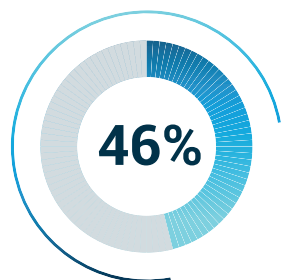


There is approximately
\$6.3 billion
worth of new health
infrastructure
across 38 projects.

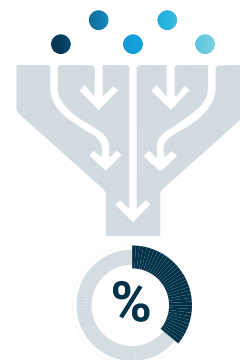
NON-GOVERNMENT CONTRIBUTION



More than half of the pipeline of **education infrastructure projects' value** is attributable to **non-government investment**.



Nearly half of the pipeline of **health infrastructure projects' value** is attributable to **non-government investment**.



Non-government projects represent 36.7% of the total number of **pipeline infrastructure projects**



There are **11 universities** supporting **225,000 enrolments** across **1.9 million sqm of GFA**

or less than 9m²/per enrolment, an effective floorspace scale and utilisation approaching **comparison to the 2.3million sqm Brisbane CBD office market**.



There are **337 residential aged care facilities**

including 32,750 operational beds, **37% more than the number of hotel rooms in Brisbane**.



37 private hospitals (including psychiatric) supporting **6,100 beds**