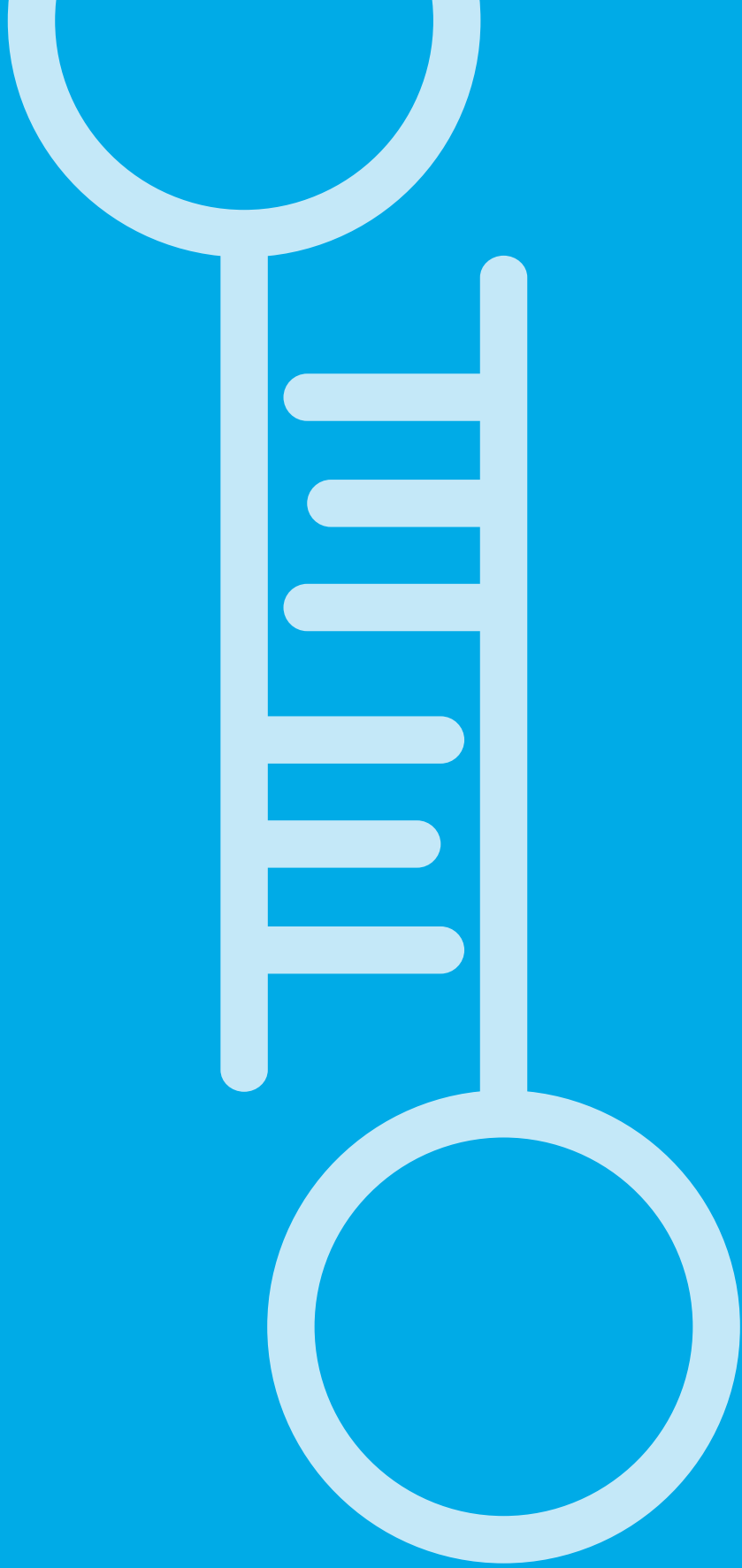


Unlocking true growth
G20: Insights from the
Social Progress Index 2014





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Unlocking true growth

The Group of Twenty (G20) provides a valuable opportunity for leaders to discuss a wide range of global economic issues. Addressing the global growth challenge is a priority for the G20 in 2014. Growth on its own without social progress is an empty goal. A more holistic framework is needed. The Social Progress Index (SPI) provides a framework for comparing countries globally and driving a new dialogue in the debate around opportunities to unlock true growth and sustainable progress.

The world is facing a myriad of new economic and social challenges. In response to these challenges the traditional models are being disrupted by the solution economy. By examining the SPI and subsequent indicators we are able to compare the performance of G20 countries. The SPI can be used to identify opportunities to enhance growth.

Background

The G20 provides a valuable opportunity for leaders to discuss a wide range of global economic issues and to use their collective power to make a difference. Over the past five years, the G20 has shaped the world's efforts to restore growth and build the resilience of financial institutions and national economies. Addressing the global growth challenge is a priority for the G20 in 2014.

Growth has flow-on effects: growth in one country results in growth in other countries providing the opportunity for people to lift themselves from poverty and raise their living standards. Given the economic weight of the G20, growth in these major economies can have a particularly positive impact on the fortunes of all.

Growth strategies

The G20's immediate task is breaking the cycle of low growth including diminished business and consumer confidence. In February 2014, G20 Finance Ministers and Central Bank Governors committed to developing new measures with the aim of raising the level of G20 output by at least 2 per cent above the currently projected level in the next five years. This would translate to millions of additional jobs and contribute over \$2 trillion to global Gross Domestic Product.

The Brisbane Action Plan, to be discussed by leaders in November 2014, will put in place short and medium-term actions to help achieve this growth ambition.

Many governments are at, or close to, the limits of macroeconomic policy responses. The challenge for governments now is that they need to think beyond the usual macroeconomic levers to support social progress. Moreover, growth on its own without social progress is an empty goal.

Traditional approaches to solving society's most complex and challenging social problems are not sustainable. New approaches are needed to achieve growth and a sustainable future. These complex problems take time to come to fruition therefore we to act with a sense of urgency to solve these issues.

Improving the wellbeing and opportunity for all can lift people out of poverty, reducing reliance on Government support and increasing economic activity in the future.

Social Progress Index

GDP has been the gold standard for measuring economic success for over 80 years. There is a growing recognition of the need to measure progress over and above GDP to understand the sustained impact of any growth strategies. A more holistic framework of progress measures is needed, to assess growth and competitiveness which includes economic and social factors to create a complete picture. Deloitte is working with the Social Progress Imperative, a non-profit which is driving the global debate on measuring what matters most to advance progress.

The Social Progress Index (SPI)¹ is driving a new dialogue in the debate around opportunities to unlock true growth and sustainable progress. Designed to complement other economic indicators, the SPI 2014 measures a country's social and environmental strengths and weaknesses to help prioritise investment decisions. Utilising indicators above and beyond standard economic factors, the SPI presents a more holistic assessment of 132 countries ranked across three key dimensions (see figure 1).

The key design principals focus on:

- **Exclusively social and environmental indicators:**
Allows SPI to rigorously and systematically analyse the relationship between economic development and social development
- **Outcomes not inputs:**
To measure what matters to the lives of real people
- **Actionability:**
A practical tool to help leaders in government, business and civil society implement policies and programs that will drive meaningful social progress
- **Relevance to all countries:**
A holistic measure of social progress that encompasses the health of any civil society.

Figure 1: Social Progress Index



SPI Methodology 2014

The SPI methodology incorporates three architectural elements devised after extensive review of the literature and availability of data: dimensions, components, and indicators. Dimensions represent the broad conceptual categories which define social progress. The Index is calculated as the equal weighted average of a country's score on each dimension. Within each dimension are components: four unique but related concepts together composing each dimension. Each component is composed of indicators which measure as many valid aspects of the component as possible. These indicators are aggregated using a weighted average, where the weights are determined by factor analysis. The individual indicators within the SPI framework are shown in figure 2.

The use of data in the Index is limited to 2004–2014 data for any given indicator and country. This is done to create the most current index possible while not excluding indicators or countries that update on a less frequent basis. The average year of data in the 2014 Social Progress Index is 2011. A small number of data points are from 2007 or earlier; these are mostly from OECD countries and are indicators where progress is made slowly, such as literacy rates, access to electricity, and deaths from indoor air pollution.

Figure 2: Social Progress Index²

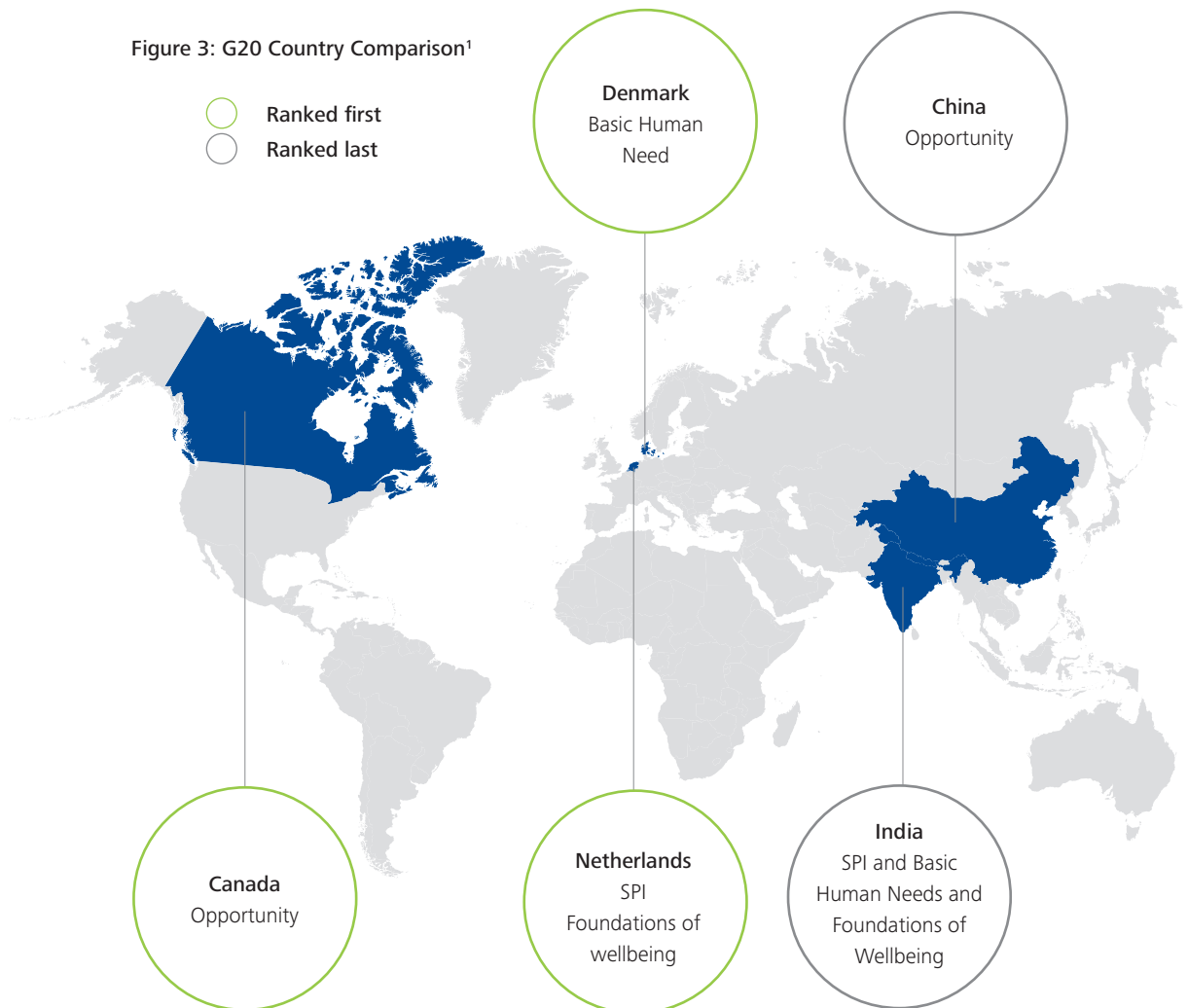


Country comparison

In contributing to the G20 growth strategy debate it is worth examining how the G20 countries compare in terms of their social and economic progress. The SPI can be used to compare countries on facets of social progress, allowing the identification of specific areas of strength or weakness at the country level. It also allows countries to benchmark themselves against peer countries both at the level of individual indicators as well as in terms of more aggregate measures of social progress.

Of the G20 countries[^], Netherlands ranks number one overall in the SPI for the G20 and highest for the Foundations of Wellbeing component. Denmark ranks highest in terms of the Basic Human Needs component and Canada for the Opportunity component. India ranks lowest of the G20 countries in terms of overall SPI, and the Basic Human Needs and Foundations of Wellbeing components, while China ranks last in terms of the Opportunity component.

Figure 3: G20 Country Comparison¹



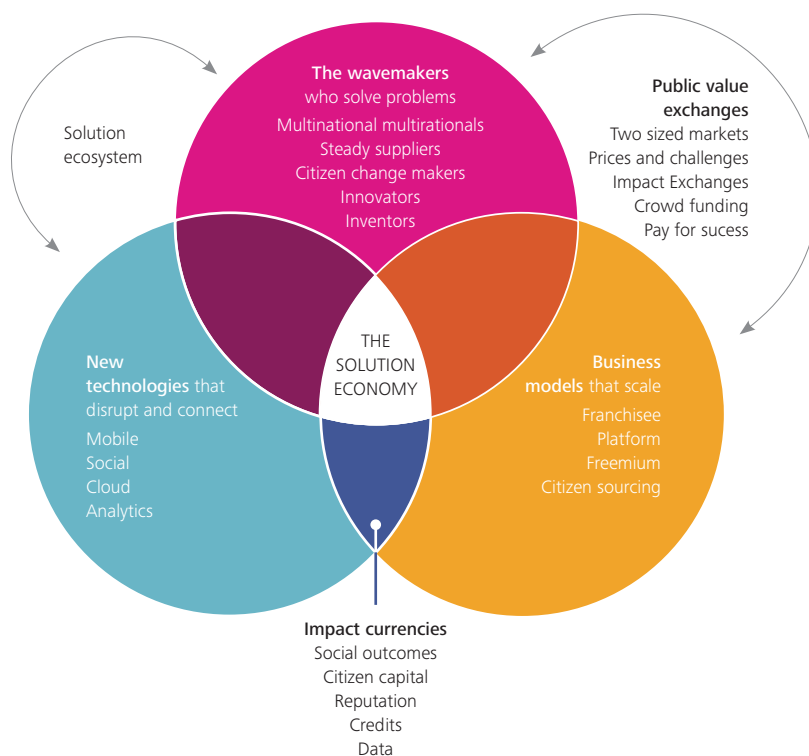
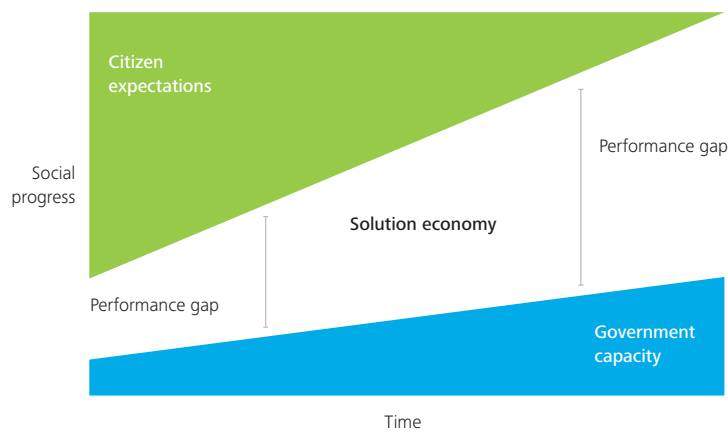
[^] The G20 is made up of 40 countries including Argentina, Australia, Austria, Belgium, Brazil, Bulgaria, Canada, China, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, India, Indonesia, Ireland, Italy, Japan, Republic of Korea, Latvia, Lithuania, Mexico, Netherlands, Poland, Portugal, Romania, Russia, Saudi Arabia, Slovakia, Slovenia, South Africa, Spain, Sweden, Turkey, United Kingdom, and United States.

Solution economy

The world has never seemed so complicated, the problems facing us have never been so insurmountable. Businesses, governments, NGOs – all of us, need a better way to problem solve. Together, we now have a valuable opportunity to improve the lives of many.

In recent years governments have increasingly struggled to meet the needs of their citizens. The world is facing a myriad of new economic and social challenges. The global financial crisis and changing demographics have created extra pressure while citizens' expectations for public services and benefits continue to rise. A gap has been created between expectation and capacity as shown in figure 4.

Figure 4: The solution economy³



In tandem, many non-governmental actors are increasingly playing a role in driving social progress, filling the gap left by governments. From foundations to social enterprises, to large multi-nationals the space is getting busier. This shift, from a government-dominated model to one in which government is just one player among many, has been termed the 'Solution Economy'. By erasing public-private sector boundaries, they are unlocking trillions of dollars in social benefit and commercial value. There are five central elements which comprise the solution ecosystem as shown in figure 5:

- Wavemakers
- Impact currencies
- Public value exchanges
- Disruptive technologies and
- New business models.

By examining the SPI indicators and comparing G20 countries we demonstrate the ways in which the SPI can be used to unlock opportunities for true growth in Australia and examples of how these opportunities could be solved through the solution economy.

Figure 5: The solution ecosystem³



Australia

Out of the 132 countries ranked in the 2014 Social Progress Index New Zealand ranks number one followed by Switzerland and Iceland, with Australia ranked 10 (see appendix 1).

Of the 40 G20 countries the Netherlands, Sweden and Canada ranked the highest in terms of social progress as shown in figure 6. Among G20 countries Australia ranked 6th on the SPI which was made up of the following dimensions:

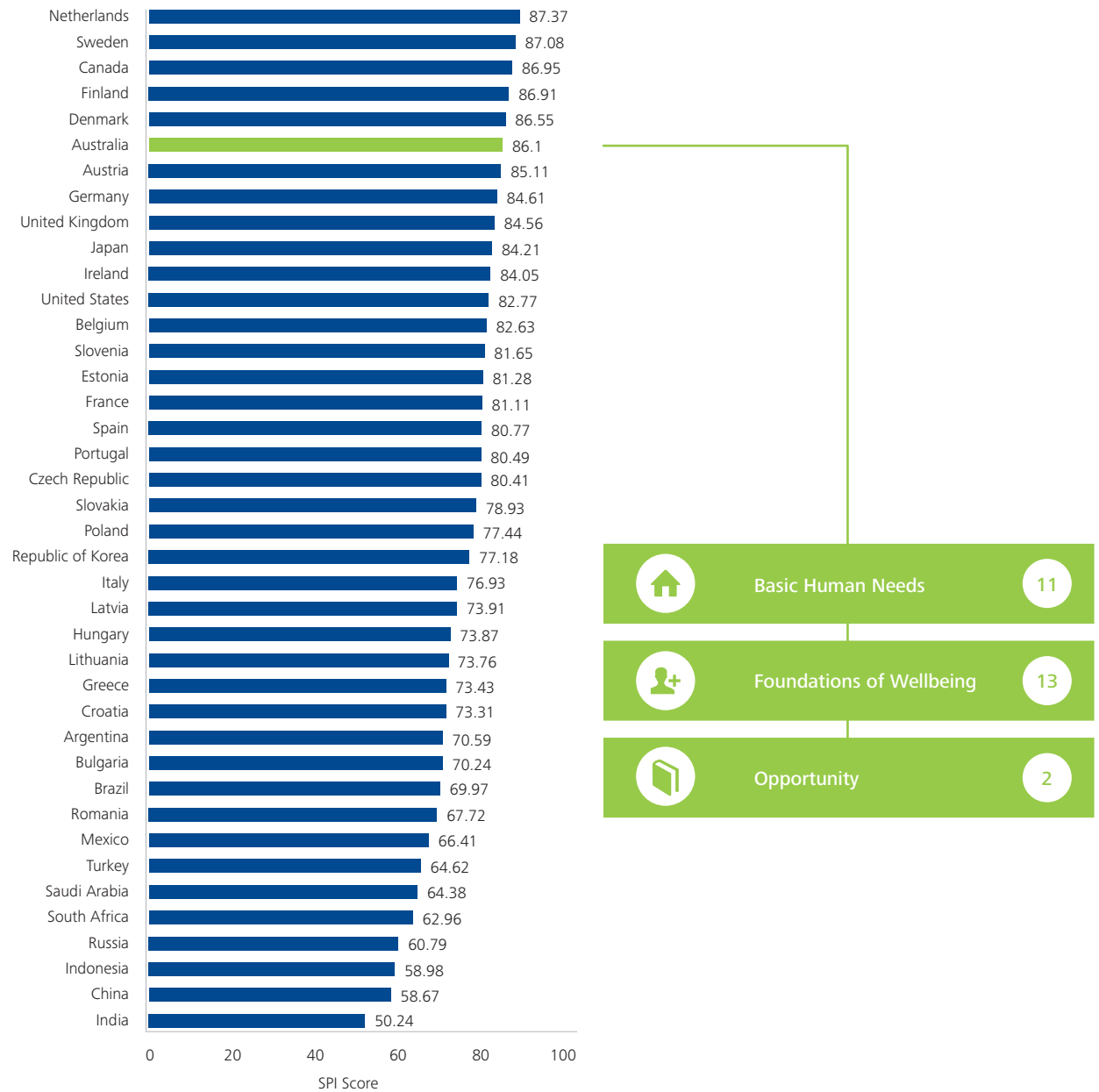
- Basic Human Needs ranked 11 of the G20 countries providing an indication of the level to which a country provides for its people's most essential needs
- Foundations of Wellbeing ranked 13 providing an indication of the degree to which building blocks are in place for people to improve their lives
- Opportunity ranked 2 providing an indication of the opportunity for people to improve their position in society.

Each country can analyse the components of their SPI and determine what areas can be actioned for maximum growth. For example while Australia performs well broadly across the SPI there are still areas for improvement. The following pages include a deep dive into some of Australia's key social challenges identified through the SPI, when compared to other G20 countries including:

- Adult literacy
- Obesity and
- Affordable housing.

These indicators were selected as SPI indicators in which Australia compared poorly relative to other G20 countries.

Figure 6: G20 countries – Social Progress Index



There are 40 countries represented in the G20 due to the inclusion of the European Union.

Basic human needs

Dimension – Basic Human Needs
Component – Shelter
Indicator – Availability of affordable housing
(% satisfied)

Housing affordability is an important determinant of the standard of living. Higher cost housing leaves less in discretionary incomes, thus increasing financial stress. House prices have risen at much greater trajectories than household incomes in many economies. This has invariably been associated with urban containment policy and is most evident in Australia, New Zealand, the United Kingdom and some markets of Canada and the United States⁴.

The housing affordability problem is even worse in emerging economies because rapidly increasing household income combined with constraints on appropriate land supply are putting an enormous pressure on housing prices. Australia ranks 21 of the 40 G20 countries in terms of availability of affordable housing, leaving significant room for improvement as shown in Table 1. This indicator shows the percentage of respondents answering satisfied to the question, ‘In your city or area where you live, are you satisfied or dissatisfied with the availability of good, affordable housing?’. G20 Countries such as Japan, Denmark and China rank favourably.

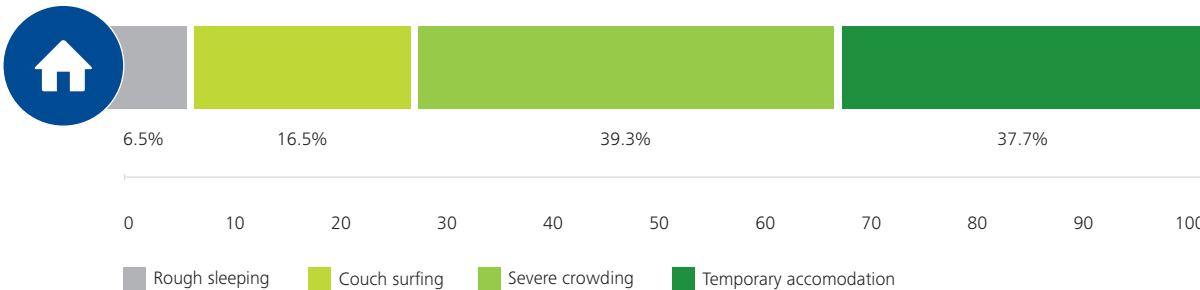
In Australia housing affordability has continued to decline. In Australia 862,000 lower income households were experiencing housing stress, comprising 15.8 per cent of all Australian households and 28.2 per cent of low income households in 2002–03⁵. In addition 105,237 people in Australia were homeless in 2011⁶. The proportion of homeless by type is shown in Figure 7.

Housing affordability stress is particularly acute for private renters, single-person households under the age of 65 and low income home purchasers⁵. The decline in housing purchase affordability is a structural problem created by house prices growing faster than incomes over the last half century⁵.

Table 1: Ranking of G20 countries – availability of affordable housing (% satisfied)

Rank	Country	% Satisfaction
1	Japan	79.0
2	Denmark	72.0
3	China	71.0
21	Australia	50.0
38	Slovenia	24.0
39	Russia	23.0
40	Poland	21.0

Figure 7: Proportion of homeless by occupancy type (2011)



House and rental price instability has significant consequences for the broader economy by affecting household spending patterns and generally reinforcing economic volatility. Lack of affordability in particular areas also affects employment. Housing affordability problems are predicted to increase as a result of anticipated demographic and housing market changes. A generation unable to purchase homes leads to widening and unsustainable inequalities⁵.

So how can Australia address this issue?



Wavemakers

who revolutionise approaches to tough social challenges.

Over the last decade or so, a variety of new players have entered the societal problem solving arena. We call them Wavemakers. They are for profit, nonprofit, and governmental organisations or individuals that revolutionise how the world approaches social challenges.

Good practice in the area of affordable housing and reduction of homelessness should incorporate services that target homelessness and all of its causes and consequences, including housing, health, work, mental health issues, education, vocational skills, life and social skills.

Long term solutions will require collective action from wavemakers focusing on facilitating independence and moving people into permanent housing.

Foundations of wellbeing

Dimension – Foundations of Wellbeing
Component – Access to Basic Knowledge
Indicator – Adult Literacy Rate (Pop. 15+)

The modern economy is marked by an increasing demand for information processing skills and other high level cognitive and interpersonal skills. The availability and appropriate use of these skills is essential for continuing growth in our economic productivity. Individuals lacking competency across these skill areas are at risk of not being able to participate fully in the labour market, education and training, and social and civic life.

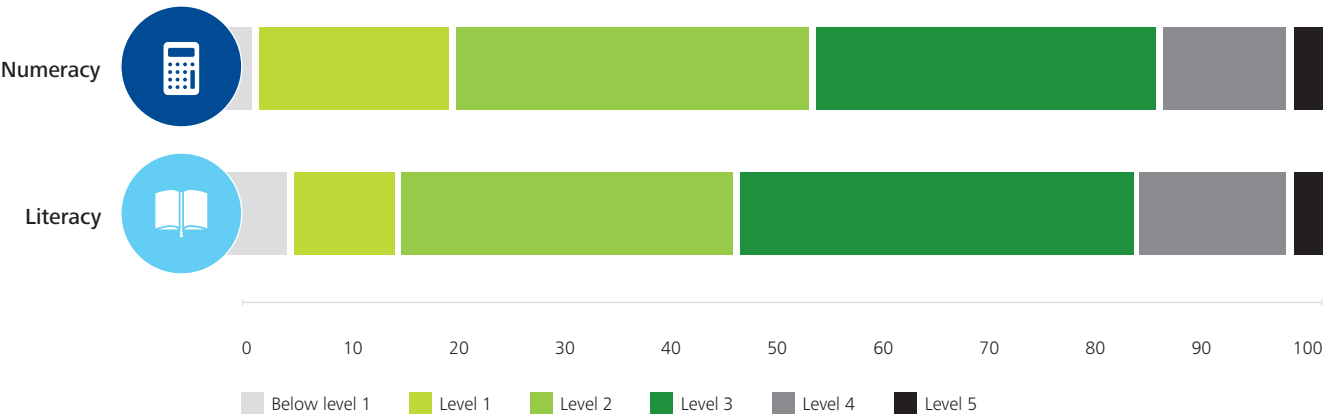
Among the G20 countries, Australia ranks 21st in terms of the adult ‘literacy rate’ – (as shown in table 2). This indicator shows the percentage of the population aged 15 and above who can, with understanding, read and write a short, simple statement on their everyday life. Literacy skills are also linked to an individual’s ability to undertake problem solving and the use and application of her/his numeracy skills. Countries such as Finland, Estonia and Latvia ranked favourably.

Figure 8: Proportion of adults at each literacy and numeracy level 2011–12

Even though Australia does well on the high level measure, there are problematic trends below the surface. In 2011–12 around 3.7% (620,000) of Australians aged 15 to 74 years had literacy skills estimated at below Level 1, with a further 10% (1.7 million) at Level 1 and 30% (5.0 million) at Level 2 (noting that the assessment scale ranges between below Level 1 – the lowest rating – and Level 5). Regarding numeracy skill levels, close to 6.5% (1.1 million) of Australians were estimated at below Level 1, 15% (2.5 million) at Level 1 and 32% (5.4 million) at Level 2 as shown in figure 8.

Table 2: Ranking of G20 Countries – Adult Literacy Rate (Pop. 15+)

Rank	Country	% of Population
1	Finland	100.0
2	Estonia	99.8
3	Latvia	99.8
21	Australia	99.0
38	Brazil	90.4
39	Saudi Arabia	87.2
40	India	62.8



The implications of these results are clear, with low levels of literacy and numeracy skills linked to low socio-economic status high unemployment, lower productivity and poorer economic outcomes.

So how can Australia address this issue?



Disruptive technologies
that enable new approaches
at radically lower costs

Emerging technologies can enable innovation to apply new approaches to an incredibly diverse range of challenges, at radically lower costs than previously possible. These powerful tools are enabling better access to methods and instruments for enhancing literacy (and numeracy) skills. Across each tier of education – from early childhood education to higher education – many of the benefits of technological developments will involve improvements in the quality and range of services provided to students. In schooling, for example, tablet technology is increasingly being used in the classroom to enhance existing teaching strategies, ranging from the use of eBooks in reading groups, through to the recording of stories and reading. In vocational education, pre-training literacy and numeracy assessments are being conducted electronically by many training providers.

Dimension – Foundations of Wellbeing
Component – Health and Wellness
Indicator – Obesity rate (% of pop.)

Worldwide obesity has nearly doubled since 1980⁸. Overweight and obesity are leading risks for global deaths, with around 3.4 million adults dying each year as a result of these conditions⁸. Globally overweight and obesity contribute to⁸:

- 44% of the diabetes burden,
- 23% of the ischaemic heart disease burden and
- between 7% and 41% of certain cancer burdens.

The risk for these diseases increases, with higher body mass index (BMI).

The growing trend in overweight and obesity is reflected in Australia. Between 2007–08 and 2011–12, the rate of adult overweight and obesity significantly increased nationally to nearly two thirds (from 61.1% to 63.2%)⁹. Children are also affected with a quarter (25.3%) of children (aged 5–17 years) being overweight or obese in 2011–12, (17.7% overweight and 7.6% obese)⁹. The distribution of adults and children in each weight category is shown in figure 9.

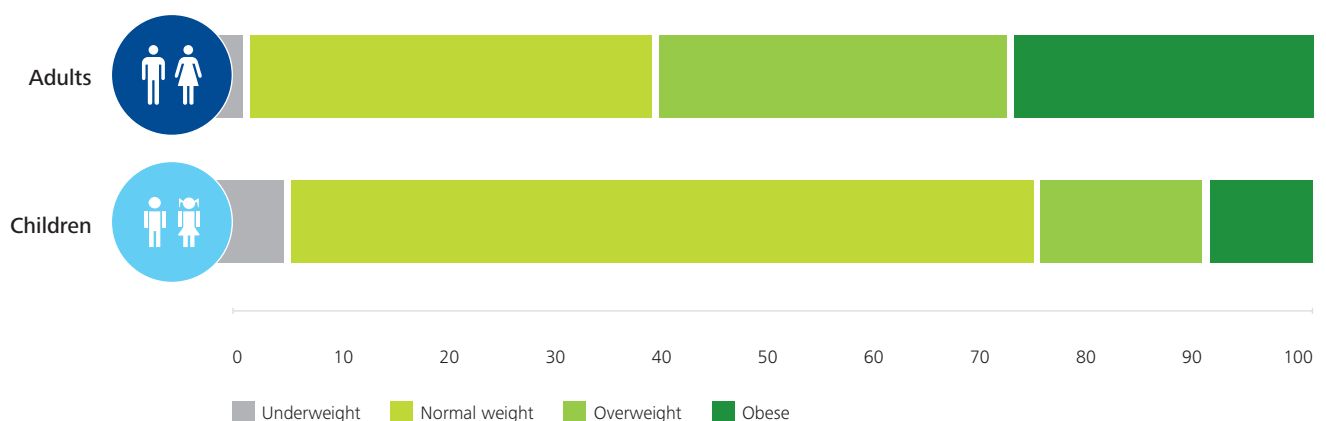
Australia ranks 32 of the 40 G20 countries in terms of obesity demonstrating significant room for improvement as shown in Table 3. This indicator only includes the population with a BMI of 30 kg/m² or higher. Countries such as India, Japan and Indonesia rank more favourably.

Table 3: Ranking of G20 Countries – Obesity rate (% of pop.)

Rank	Country	% Satisfaction
1	India	1.9
2	Japan	4.5
3	Indonesia	4.7
32	Australia	25.1
38	Mexico	32.8
39	South Africa	33.5
40	Saudi Arabia	35.2

Not only are there direct health costs associated with obesity but there are also other costs including productivity losses, forgone taxation revenue and career costs, welfare and other government payment costs, losses in wellbeing and premature death. In Australia the financial cost of obesity in 2008 was estimated as \$8.283 billion¹⁰. The net cost of lost wellbeing (the dollar value of the burden of disease, netting out financial costs borne by individuals) was valued at a further \$49.9 billion, bringing the total cost of obesity in 2008 to \$58.2 billion¹⁰. These costs have implications on the sustainability of economies to support growth and social progress.

Figure 9: Proportion of adults and children in each weight category 2011–12⁹



So how can Australia address this issue?



New business models
that disrupt & quickly scale.

Overweight and obesity, as well as their related diseases are largely preventable. New business models provide great potential to solve the obesity problem through creating supportive environments and communities that are fundamental in shaping people's choices, making the healthier choice of foods and regular physical activity the easiest choice (accessible, available and affordable), and therefore preventing obesity and its associated costs. We are seeing an increase in innovative collaborative business models and projects which are replicable and scalable being used to address health and wellness issues. Businesses are recognising the value of healthy workforce and interesting by providing access to wellness programs.

The way forward

Responses to these social challenges

Each generation seeks to leave the next generation better off. Yet the challenges facing business, government and non-government organisations are increasingly complex with numerous competing priorities to improve society's economic and social wellbeing. Traditional approaches to solving society's most complex and challenging social problems are not sustainable. A new approach is needed.

To achieve growth G20 countries will need to:

- Harness a mix of macroeconomic and structural reforms that suit each country's circumstances in areas with the greatest potential to lift domestic and ultimately global prosperity
 - Bring together the right people to co-design and co-deliver solutions
 - Support a more collaborative approach that brings together experience and expertise from government, business and society to be the wavemakers that develop innovative solutions to our most complex social issues
 - Utilise collective impact approaches and foster partnerships
 - Translate decisions into specific actions to be undertaken by each country
 - Use metrics which measure the right things to drive long term sustainable growth and social progress.
- There is no doubt that metrics matter.

The good news is governments, non government organisations, individual investors and the private sector have been moving towards the solution economy. This will provide new ideas and solutions to social problems, improved communication and collaboration to break down historical silos and unlock true growth. There is a real opportunity to bring new approaches and perspectives to solving society's most complex challenges, to take an outcomes based focus and collaborate to deliver improved outcomes.

'In an increasingly performance-oriented society, metrics matter. What we measure affects what we do. If we have the wrong metrics, we will strive for the wrong things.'
Jean-Paul Fitoussi, Amartya Sen, Joseph Stiglitz – Mismeasuring Our Lives.

Contact details

**Lynne Pezzullo****ACT**

Partner, Deloitte Access Economics
Tel: +61 2 6175 2000
lpezzullo@deloitte.com.au

**Andrew Johnstone-Burt****National Lead for Public Sector**

Partner
Tel: +61 2 9322 7182
ajohnstonburt@deloitte.com.au

**Michael Kissane****New South Wales**

CEO, Deloitte Access Economics
Tel: +61 2 9322 7233
mkissane@deloitte.com.au

**Chris Campbell****National Lead for Not For Profits**

Partner
Tel: +61 2 9322 7180
chricampbell@deloitte.com.au

**Luke Baxby****Queensland**

Partner, Deloitte Access Economics
Tel: +61 7 3308 7202
lbaxby@deloitte.com.au

**Tharani Jegatheeswaran****Not For Profits**

Partner
Tel: +61 2 9322 5292
tjegatheeswaran@deloitte.com.au

**Lachlan Smirl****Victoria**

Partner, Deloitte Access Economics
Tel: +61 3 9671 7567
lsmirl@deloitte.com.au

**Matt Judkins****Western Australia**

Partner, Deloitte Access Economics
Tel: +61 8 9365 8095
mjudkins@deloitte.com.au

**Adrian O'Dea****South Australia**

Partner, Deloitte Access Economics
Tel: +61 8 8407 7143
AODea@deloitte.com.au

**Ursula Brennan****New South Wales**

Partner, Deloitte Access Economics
Tel: +61 2 9322 5573
ubrennan@deloitte.com.au

Authors:**Natasha Doherty**

Director, Deloitte Access Economics
Tel: +61 7 3308 7225
ndoherty@deloitte.com.au

**Amalia Savini**

Senior Analyst, Deloitte Access Economics
Tel: +61 7 3308 7355
amsavini@deloitte.com.au

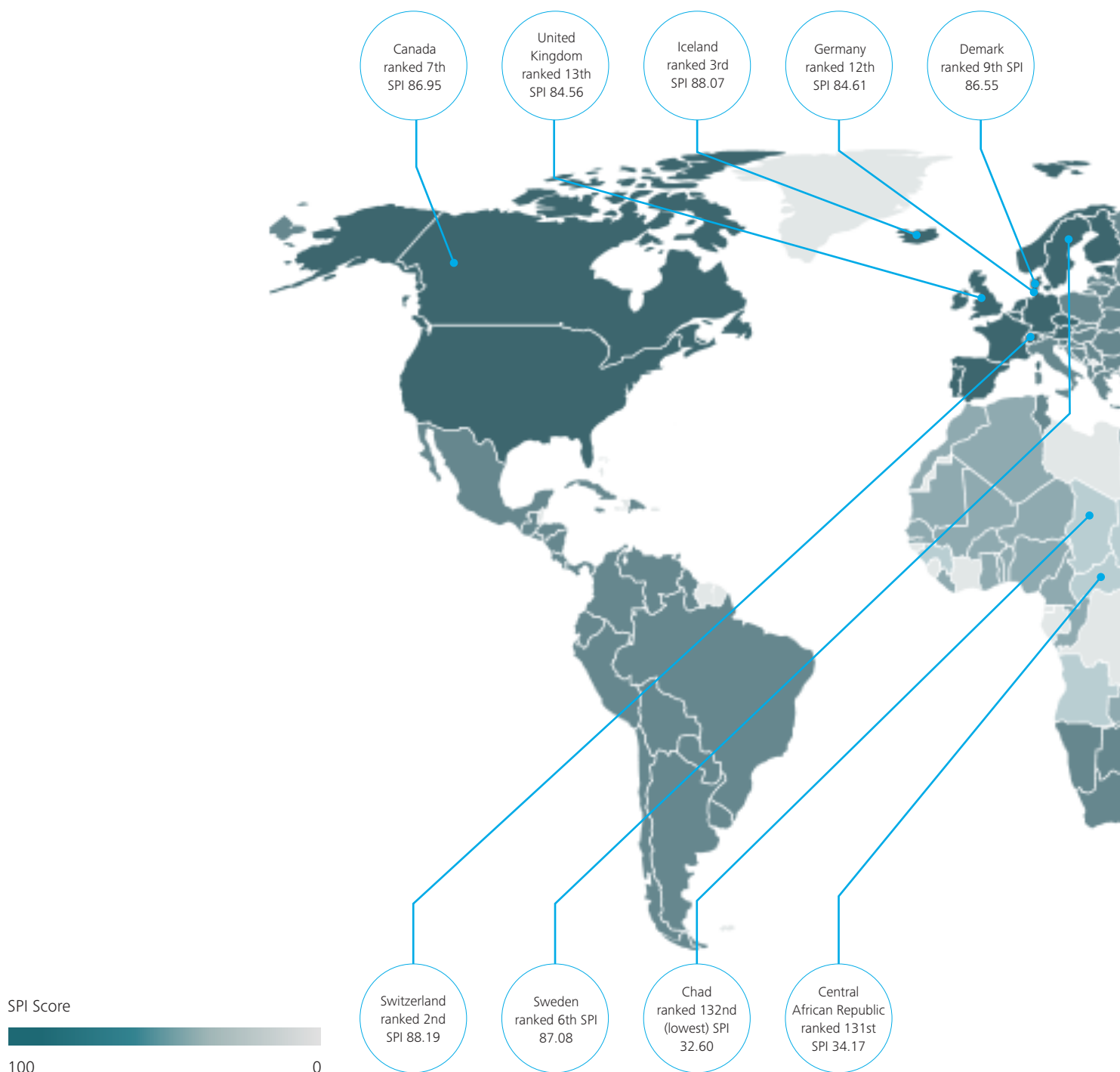
**Rebecca Pettiford**

Analyst, Deloitte Access Economics
Tel: +61 7 3308 7525
rpettiford@deloitte.com.au

Appendix 1

Figure A1: Overall world heat map – SPI ratings

Figure A1 displays the overall SPI heat map scores for 132 countries. The top three and bottom three SPI countries as well as 10 countries of similar GDP to Australia: Canada, United Arab Emirates, Sweden, Germany, Iceland, United Kingdom, Denmark, Switzerland, Japan and Kuwait are depicted.





Appendix 2

Country	Social Progress Index	Gross Domestic Product	Basic human needs	Foundations of wellbeing	Opportunity
New Zealand	1	22	18	6	1
Switzerland	2	4	2	1	12
Iceland	3	16	7	2	9
Netherlands	4	9	8	3	11
Norway	5	2	10	4	10
Sweden	6	12	5	9	7
Canada	7	14	11	17	2
Finland	8	17	4	11	8
Denmark	9	13	1	8	13
Australia	10	10	14	18	3
Austria	11	7	6	5	20
Germany	12	11	12	7	16
United Kingdom	13	20	16	19	6
Japan	14	19	3	21	14
Ireland	15	8	9	37	4
United States	16	5	23	36	5
Belgium	17	15	13	23	15
Slovenia	18	27	15	12	25
Estonia	19	32	28	10	22
France	20	18	19	20	21
Spain	21	23	22	28	17
Portugal	22	31	20	33	19
Czech Republic	23	28	17	13	28
Slovakia	24	29	21	14	34
Costa Rica	25	59	42	16	24
Uruguay	26	43	34	48	18
Poland	27	36	36	15	27
Republic of Korea	28	25	24	32	26
Italy	29	21	30	26	26
Chile	30	40	39	45	23
Latvia	31	39	41	22	40
Hungary	32	35	33	50	31
Lithuania	33	33	47	24	37
Mauritius	34	49	31	54	33
Greece	35	30	29	41	42
Croatia	36	41	26	29	56

Country	Social Progress Index	Gross Domestic Product	Basic human needs	Foundations of wellbeing	Opportunity
United Arab Emirates	37	3	25	30	59
Panama	38	47	56	25	36
Israel	39	24	35	52	49
Kuwait	40	1	27	44	66
Serbia	41	65	46	27	61
Argentina	42	N/A	53	58	32
Jamaica	43	77	75	31	29
Bulgaria	44	52	44	51	48
Malaysia	45	37	32	34	75
Brazil	46	56	73	38	35
Trinidad and Tobago	47	26	63	53	30
Albania	48	68	49	43	57
Macedonia	49	62	45	69	54
Ecuador	50	71	69	35	51
Romania	51	45	67	42	55
Colombia	52	63	74	39	50
Montenegro	53	57	50	65	64
Mexico	54	50	65	72	46
Peru	55	64	78	46	47
Philippines	56	88	80	63	38
Botswana	57	55	82	47	43
Belarus	58	46	38	73	89
Thailand	59	58	66	49	71
Armenia	60	82	51	62	77
Bosnia and Herzegovina	61	72	37	88	78
Ukraine	62	78	52	91	53
El Salvador	63	80	77	75	45
Turkey	64	42	43	82	76
Saudi Arabia	65	6	40	60	103
Georgia	66	86	62	70	72
Venezuela	67	44	84	40	67
Dominican Republic	68	67	83	56	65
Tunisia	69	61	55	77	88
South Africa	69	70	93	71	39
Bolivia	71	90	87	55	58
Paraguay	72	83	89	78	44

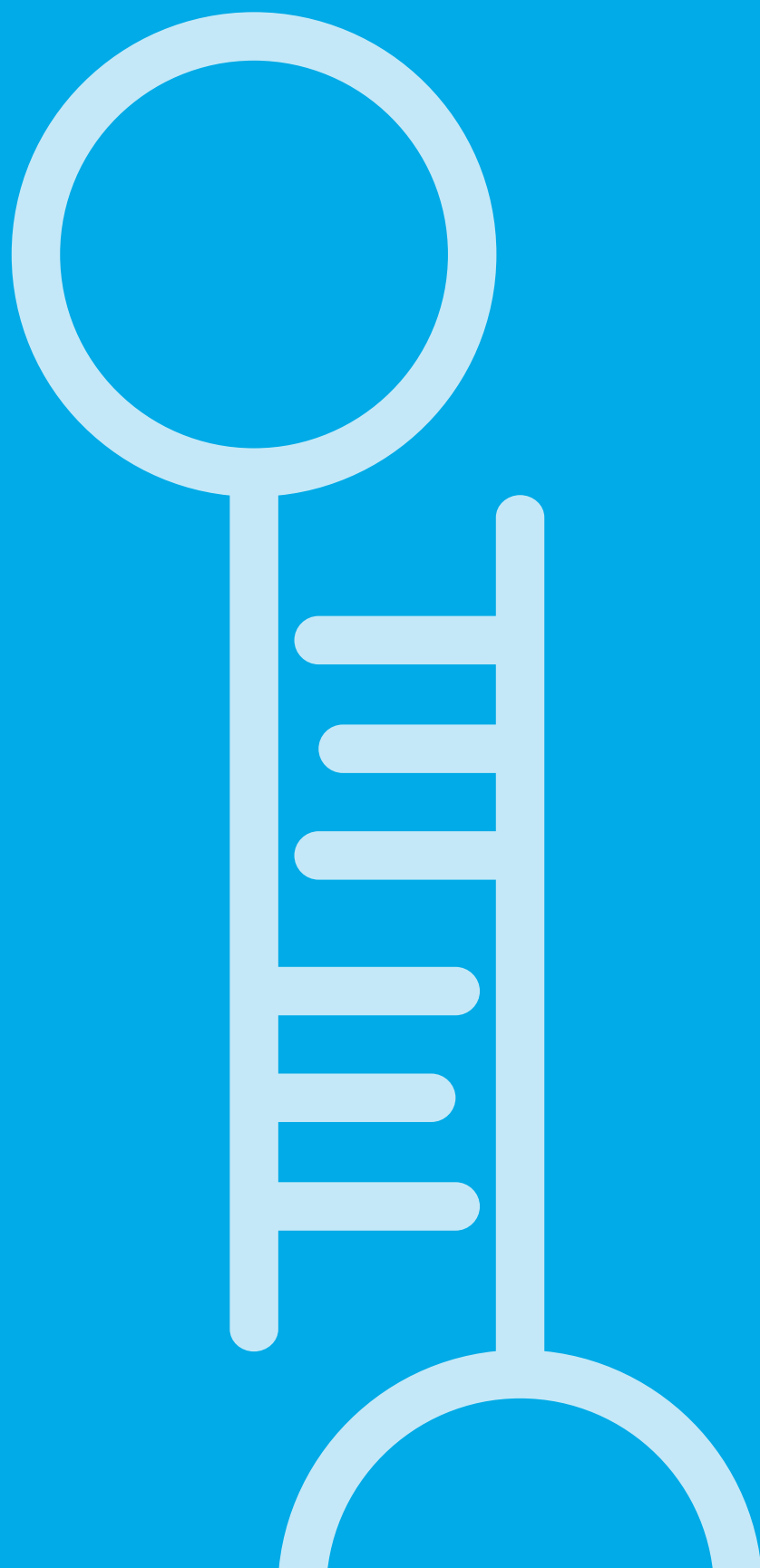
Country	Social Progress Index	Gross Domestic Product	Basic human needs	Foundations of wellbeing	Opportunity
Azerbaijan	73	51	59	67	96
Nicaragua	74	98	90	57	62
Jordan	75	66	48	93	91
Guatemala	76	84	81	68	70
Honduras	77	95	88	59	69
Namibia	78	74	95	64	52
Cuba	79	N/A	43	101	92
Russia	80	34	71	86	79
Moldova	81	99	70	98	74
Guyana	82	87	79	100	60
Lebanon	83	48	64	92	87
Egypt	84	69	57	66	116
Sri Lanka	85	75	76	74	95
Kazakhstan	86	38	61	109	73
Algeria	87	60	58	83	113
Indonesia	88	76	86	61	90
Mongolia	89	79	100	85	41
China	90	68	68	84	107
Morocco	91	85	72	89	104
Uzbekistan	92	94	60	113	94
Kyrgyzstan	93	105	85	96	81
Iran	94	53	54	100	118
Tajikistan	95	110	91	95	86
Ghana	96	101	101	80	68
Senegal	97	111	99	87	93
Laos	98	96	95	90	115
Bangladesh	99	109	96	99	105
Cambodia	100	106	108	76	100
Nepal	101	119	97	97	112
India	102	93	98	106	106
Kenya	103	113	109	79	110
Zambia	104	103	122	85	76
Rwanda	105	119	104	103	102
Benin	106	115	107	105	97
Lesotho	107	108	114	117	63
Swaziland	108	89	103	114	91

Country	Social Progress Index	Gross Domestic Product	Basic human needs	Foundations of wellbeing	Opportunity
Malawi	109	128	111	108	82
Republic of Congo	110	91	126	81	84
Uganda	111	121	113	94	108
Burkina Faso	112	118	119	107	83
Mali	113	117	110	115	98
Tanzania	114	116	121	104	99
Djibouti	115	N/A	94	130	114
Cameroon	116	107	112	112	109
Mozambique	117	124	117	118	85
Iraq	118	54	92	126	126
Madagascar	119	120	120	116	101
Liberia	120	127	123	119	80
Mauritania	121	104	105	110	128
Togo	122	122	118	111	117
Nigeria	123	92	124	102	119
Pakistan	124	97	102	122	124
Yemen	125	100	106	121	129
Niger	126	126	127	120	111
Angola	127	81	116	125	121
Sudan	128	102	115	124	127
Guinea	129	123	125	128	122
Burundi	130	129	128	127	120
Central African Republic	131	125	129	123	125
Chad	132	114	130	129	123

GDP values are GDP PPP (2011 constant international \$)

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