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informed decisions

.id is a company of demographers, housing analysts, forecasters and Census data experts who have developed demographic information products specifically for the Australian Local Government market.

.id stands for “informed decisions” and our work is to provide decision makers within government and the community with readily accessible, easy to use information about the people living in their communities of interest.

.id's products give Councils the evidence base to plan housing policy and service delivery, attract investment and promote their region, support funding submissions and compete for resources, advocate for the community and work collaboratively.



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Sector Connect - .id briefing Aug 2010

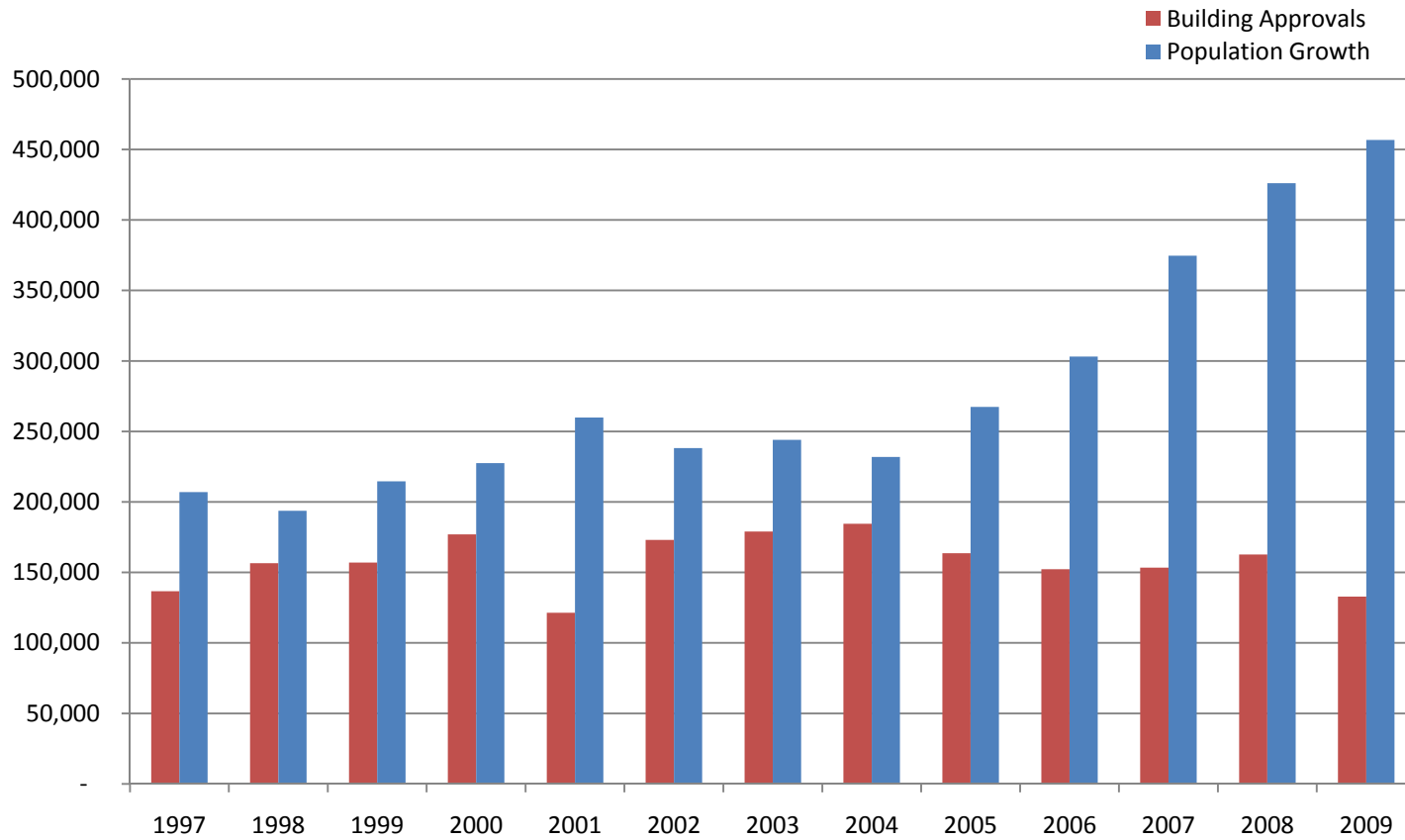
To improve awareness of how .id's information tools can be used at a strategic, council-wide level, .id will be conducting an annual demographic briefing for our Local Government Clients. This can also include regional groupings of councils such as MACROC.

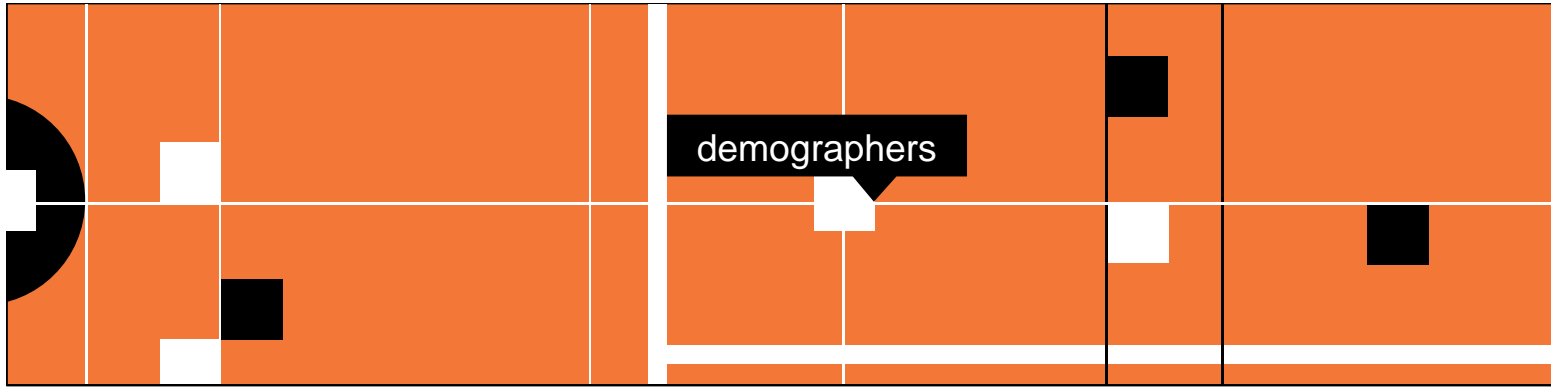
Each briefing will focus on a topic of interest and highlight key points that may be vital in framing policy, allocating scarce resources or developing your service delivery model.

The first briefing looks at the housing role that the Sector Connect region plays within Sydney and how that fits into the updated Metropolitan Strategy.

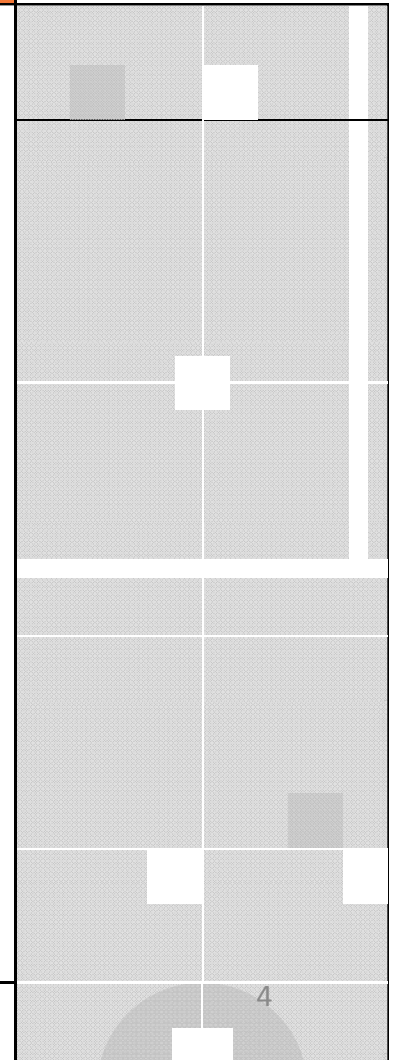
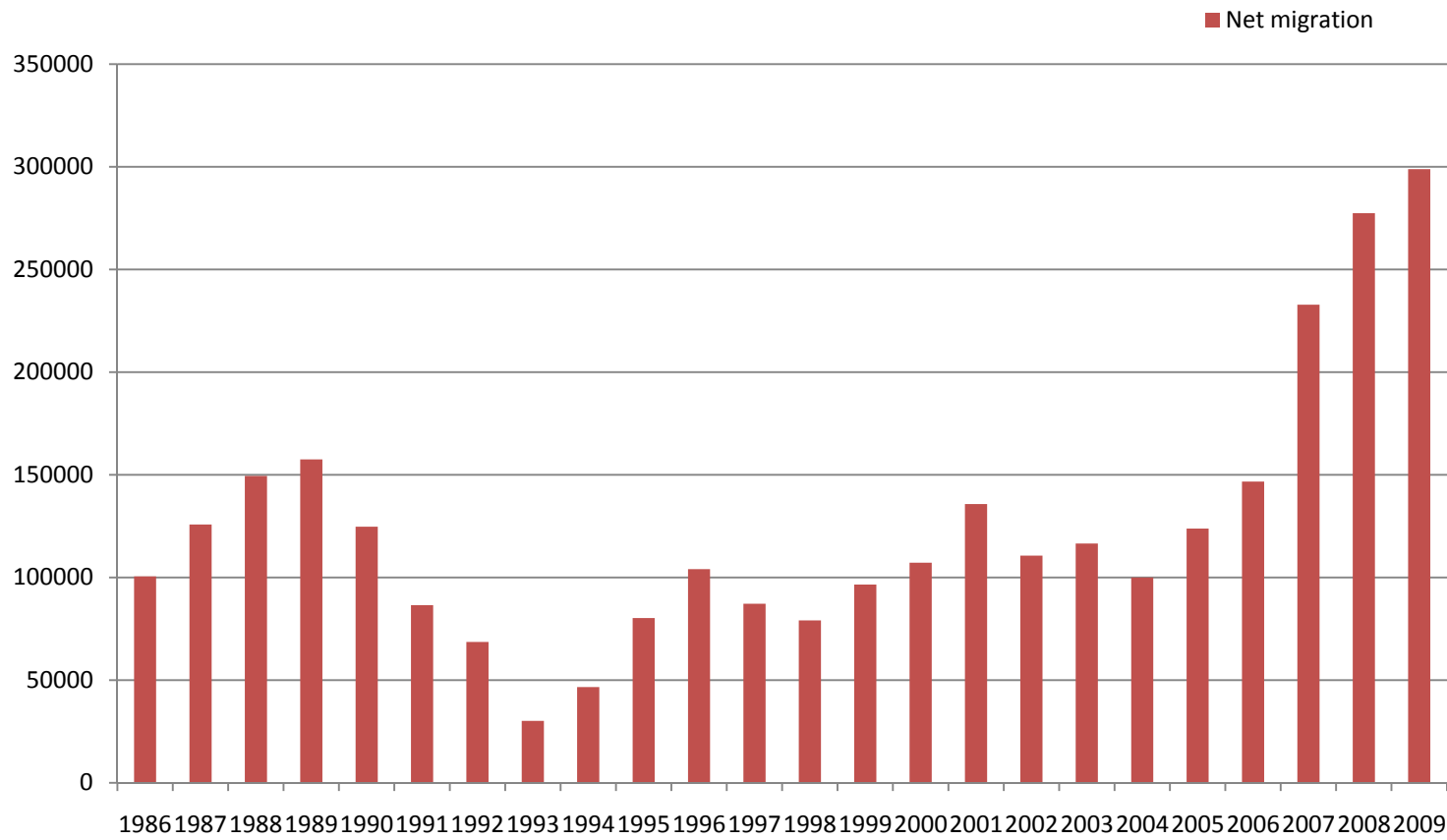
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National Context

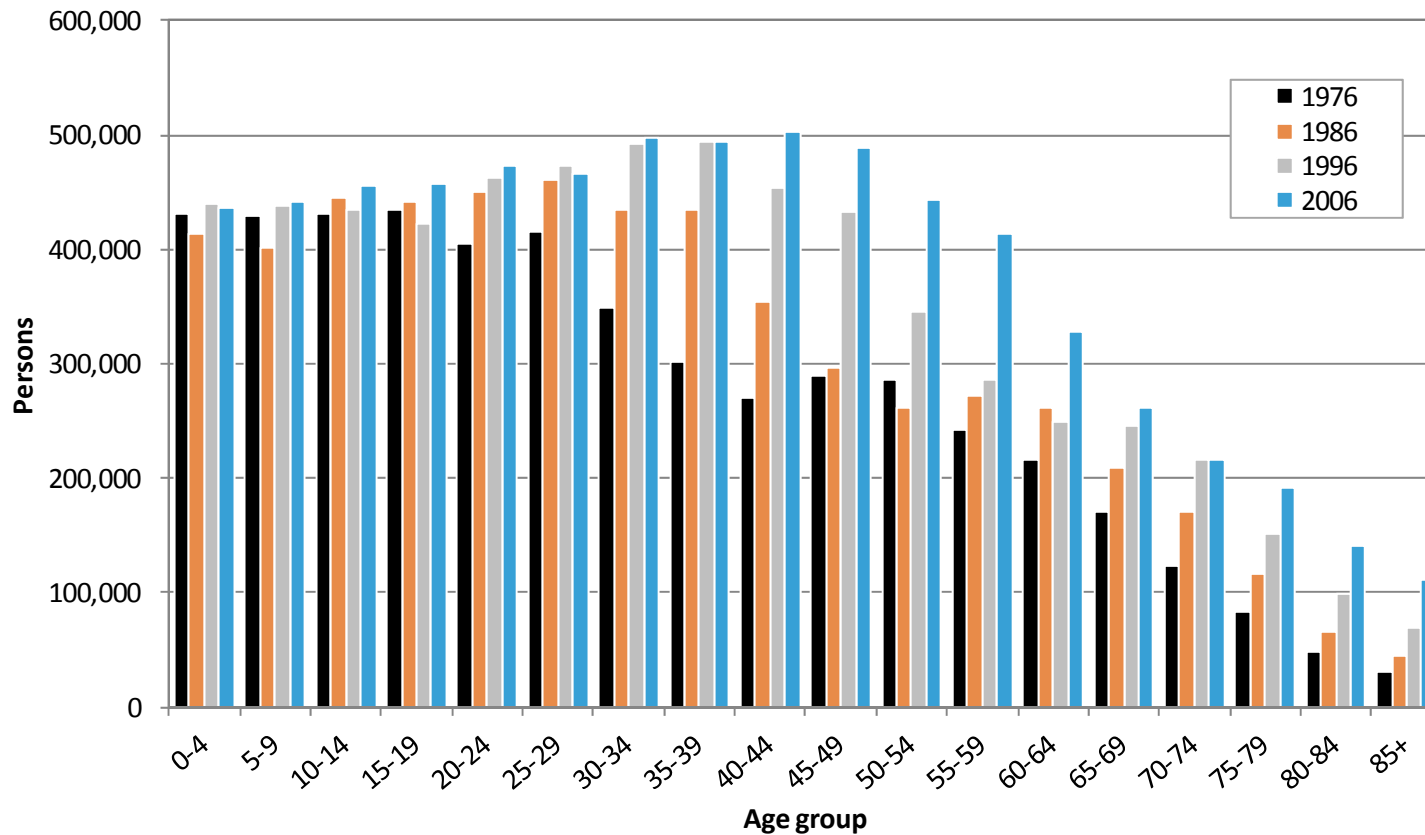




Historical Migration

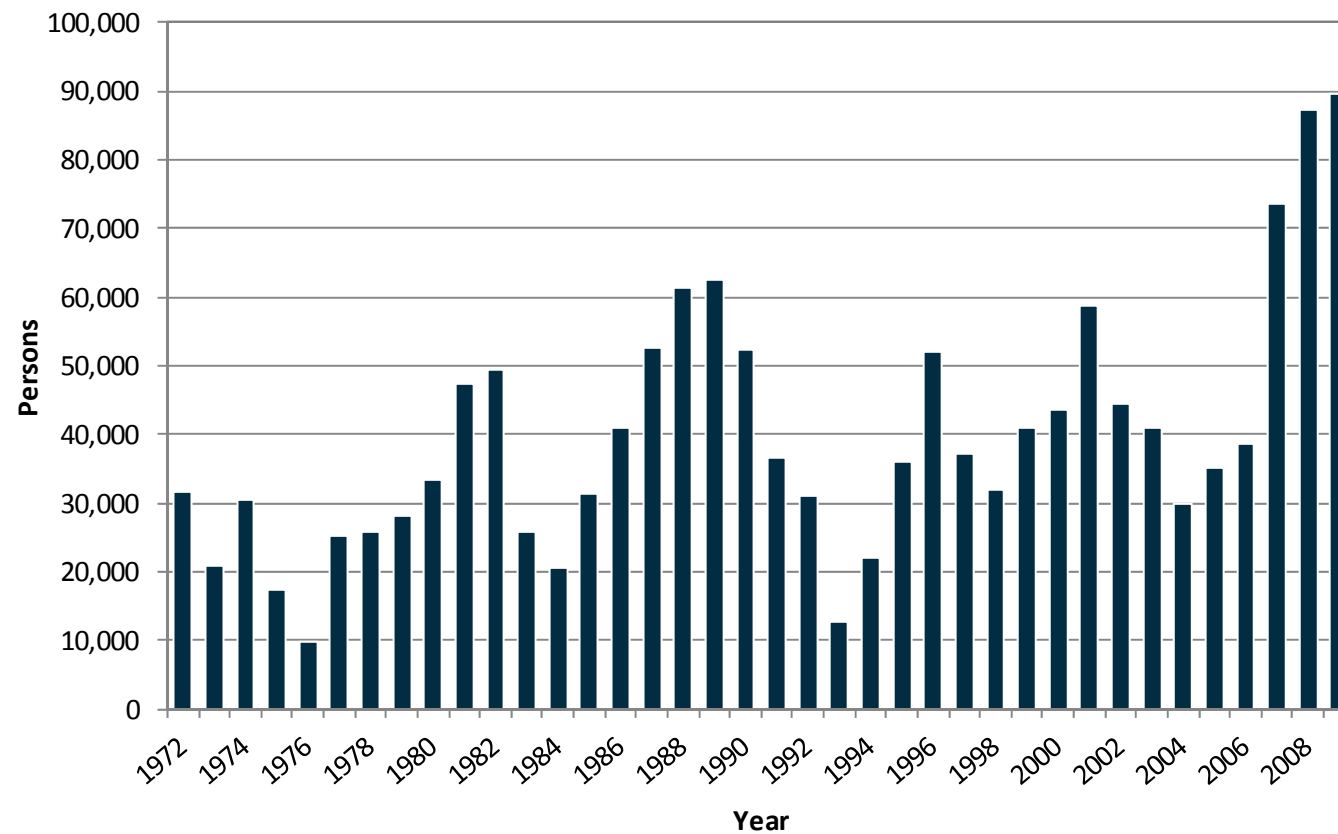


Population by five year age group, New South Wales, 1976-2006

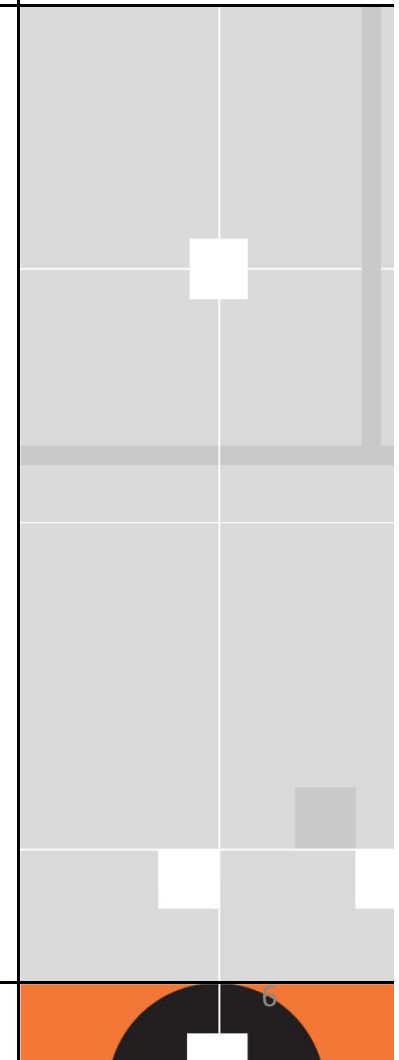


Source: ABS, Australian Historical Population Statistics, 2008

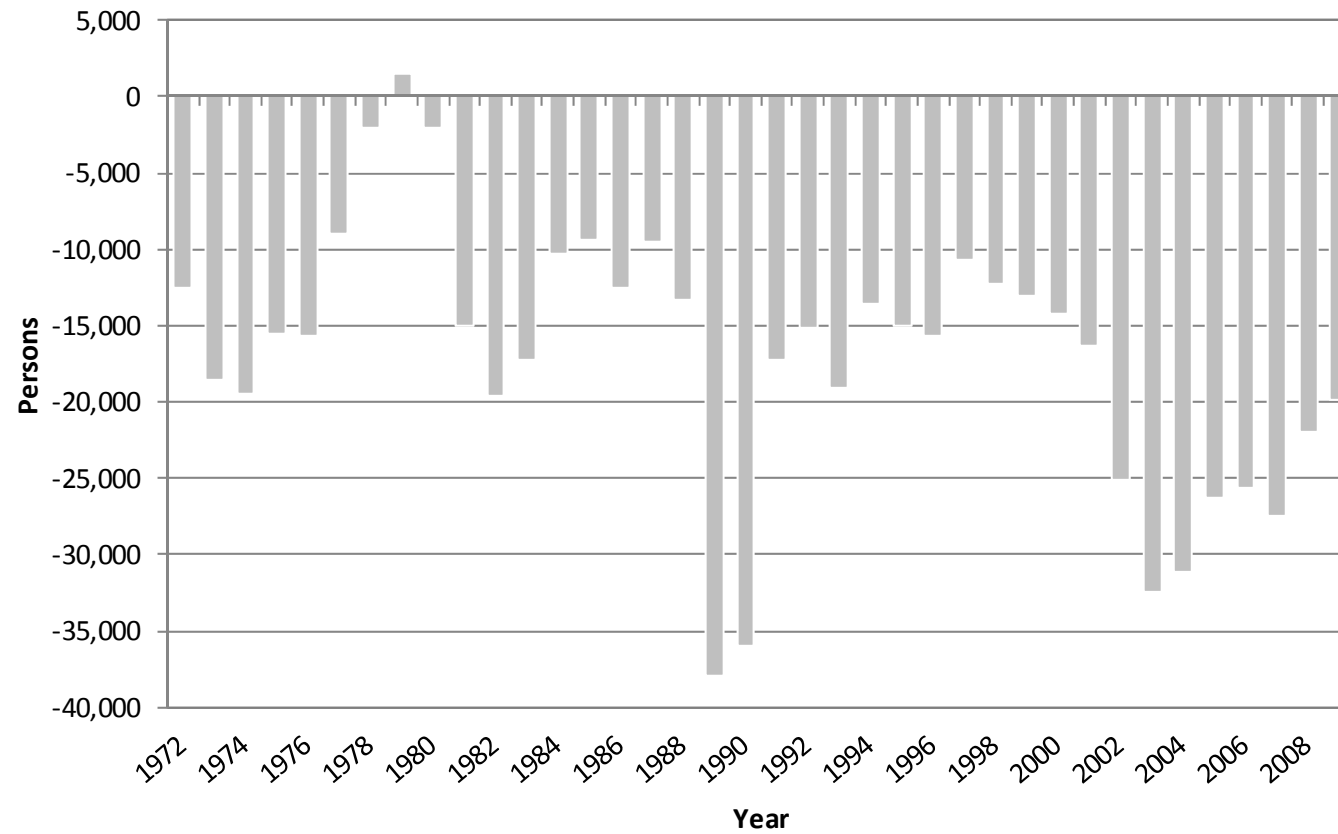
Net overseas migration, New South Wales, 1972-2009



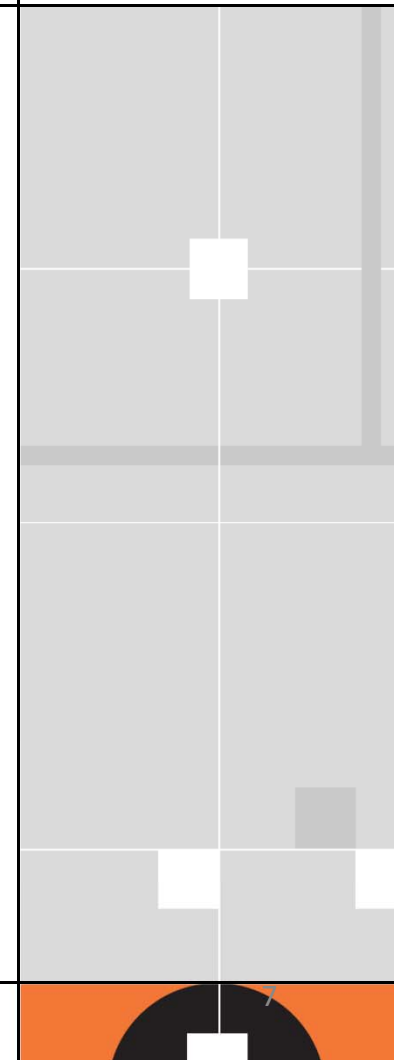
Source: ABS, Australian Demographic Statistics



Net interstate migration, New South Wales, 1972-2009



Source: ABS, Australian Demographic Statistics





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Sydney Metropolitan Strategy

Planning for population growth in the Sydney basin.

- Expected population growth of 1.7M by 2036
- South West to more than double in population to 874,000 by 2036 (this includes Liverpool, excludes Wingecarribee)
- Focus on containing urban growth to existing centres by densification.
- Nevertheless, much of the fringe growth is expected to be in the SouthWest.

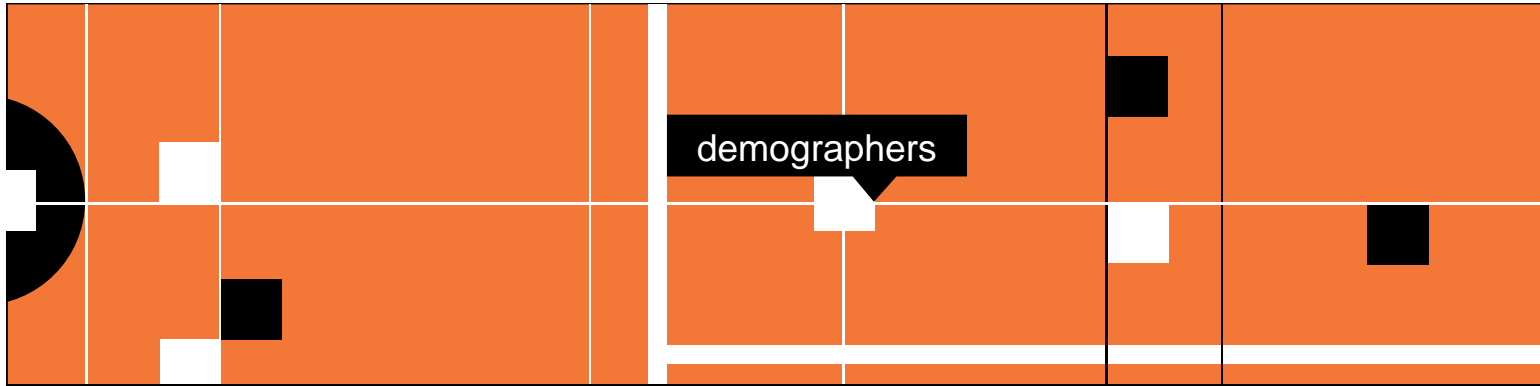


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Sydney Metropolitan Strategy

Planning for population growth in the Sydney basin.

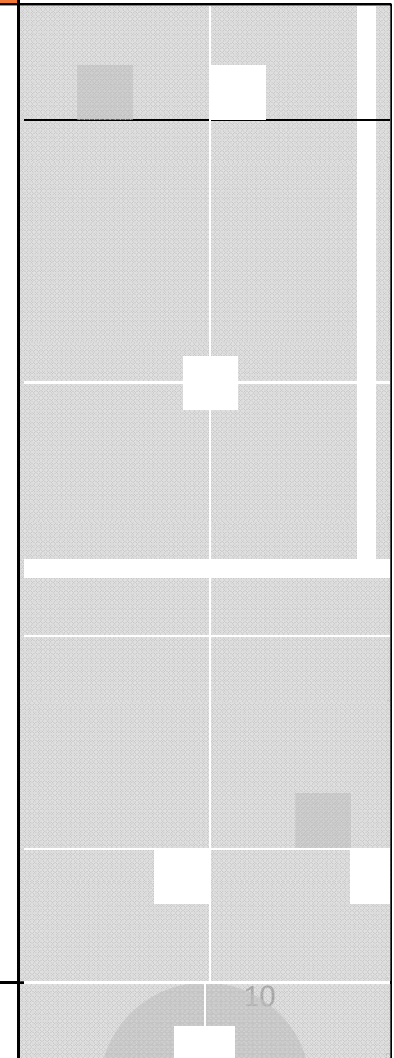
- Liverpool is designated the main centre in the region, with Campbelltown a secondary centre.
- South West corridor has a low level of jobs per person in the labour force (0.73 jobs per resident worker). Large population travel outside to work.
- Nevertheless, Campbelltown centre added significantly more jobs between 2001-2006 to be almost the same size as Liverpool.



MACROC Region – who are we?

The region in the past, particularly Camden and Campbelltown, have accommodated families relocating from closer to the city, seeking affordable housing opportunities. Wollondilly and Wingecaribee, being further out, have been home to lifestyle properties and a significant amount of agriculture and forestry.

The different areas within MACROC have quite different roles to play in the region.



MACROC Region – who are we?

The different areas within MACROC have quite different roles to play in the region.

1. Campbelltown

- employment centre
- 5th most disadvantaged LGA in Sydney.
- Population boomed in the 1970s and 80s.
- Decline 2001-2006.
- Significant cultural diversity – Islanders, South Asian communities, Philippino.
- [Age structure](#)
- [Birthplace groups](#)



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MACROC Region – who are we?

The different areas within MACROC have quite different roles to play in the region.

1. Campbelltown

- Since 2006, Campbelltown has reinvented itself.
- Public housing rebuilding (One Minto).
- Innovative affordable housing (eg. Leumeah).
- Urban consolidation (Park Central).
- Growth in 2009 was the largest of the 4 LGAs in Sector Connect.
- Forecasts available from .id, show growth to 182,000 by 2031.

MACROC Region – who are we?

The different areas within MACROC have quite different roles to play in the region.

2. Camden

- The main growth area in the region over the last decade.
- However growth nearly stalled for several years, as focus of growth moved to Liverpool.
- Upgrader area, with some first home buyers.
- Very affluent and young in most parts, except central Camden, which is elderly.
- Low cultural diversity.
- South West Growth corridor expected to have a massive impact in future. .id forecasts not yet available.
- [Age structure](#) and [incomes](#), Harrington Park.

MACROC Region – who are we?

The different areas within MACROC have quite different roles to play in the region.

3. Wollondilly

- Largely rural but generally included in Sydney Statistical Division.
- Population growth slow and consistent, about 500 people per year.
- Attracts upgraders and mature families seeking semi-rural lifestyle.
- Very little urban development so far, but lots of rural residential estates.
- .id population forecasts show growth to 58,000 by 2031, but this was based on Macarthur South Growth plan which has been superceded. Needs review.

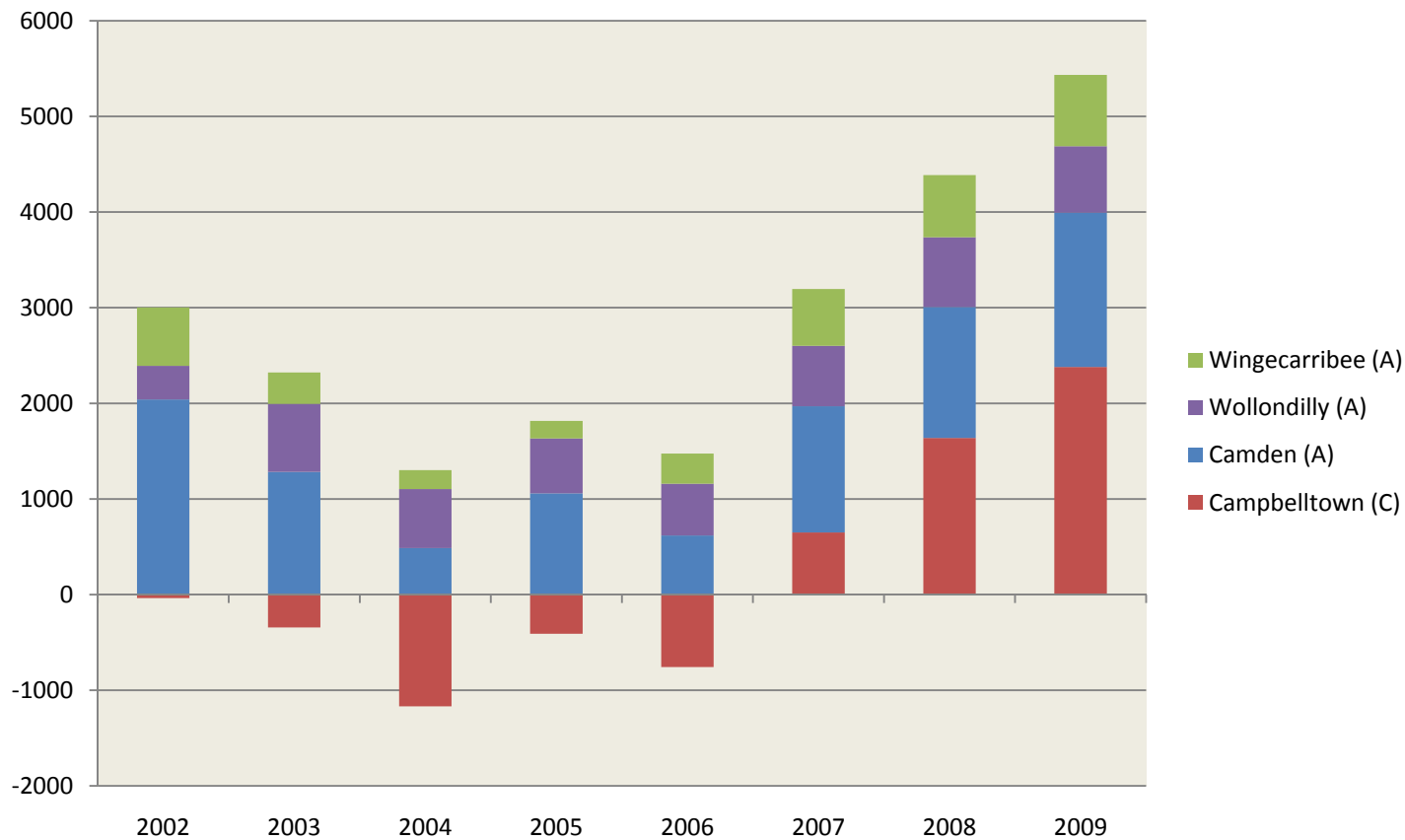
MACROC Region – who are we?

The different areas within MACROC have quite different roles to play in the region.

4. Wingecarribee

- Largely rural but with significant urban concentration in Mittagong-Bowral-Moss Vale.
- Considered to be outside the Sydney Statistical Division by the ABS, part of the Illawarra Region.
- Small but increasing population growth.
- Relatively elderly population. Retirement centre.
- Population increase including lifestyle upgraders, similar to Wollondilly.
- .id don't have a profile or a forecast at Wingecarribee.

Population growth by year, SC LGAs



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Latest Estimated Resident Population

- 2009 ERP – 296,992
- Up by 5,435 in one year.
- Record growth not seen in decades.
- Consistent growth across Western/SW Sydney.
- Driven mainly by migration.

Growth forecasts in the region

- Between 2001 and 2006, most growth in the MACROC region was in Camden, but Liverpool had stronger growth than the entire region.
- Most growth is due to fringe housing developments, which take population from older developments, as household sizes decrease. Eg. Campbelltown->Camden.
- South West Growth Corridor expecting a doubling of population in 30 years. Affects Camden and Campbelltown, but only modest growth outside Liverpool at this stage.

Growth forecasts in the region

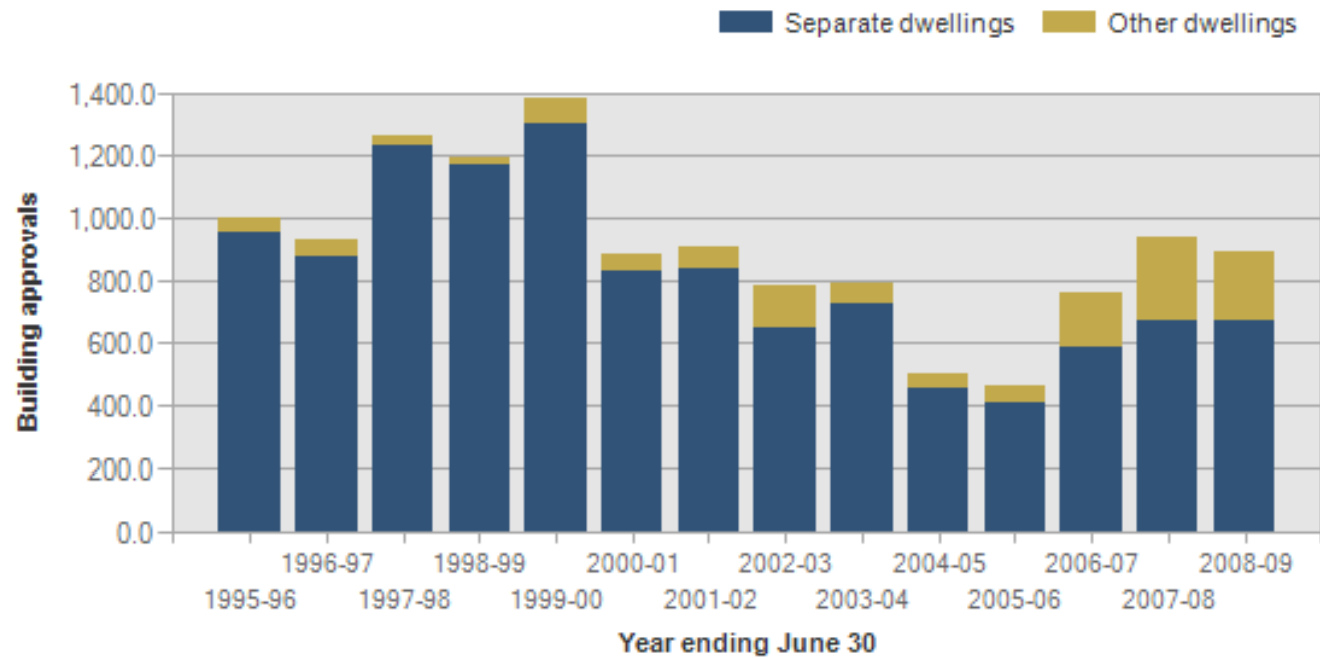
- id's population forecasts expect an increase of about 47,000 people in Campbelltown and Wollondilly by 2031.
- Next review in Campbelltown will probably increase this a bit.
- Planning NSW forecasts show population of 558,000 for the region by 2031. Most of the growth is in Camden.
- Will the region have the jobs to support such a large population?

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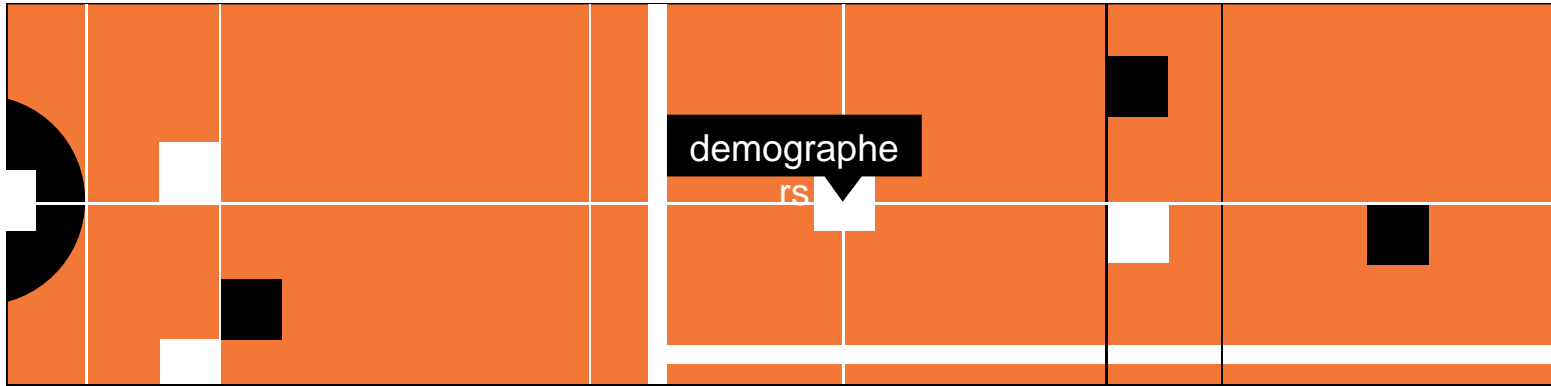
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Dwelling approvals in MACROC

Residential Building approvals, Macarthur Regional Organisation of Councils



Source: Australian Bureau of Statistics, Building Activity, Australia, (catalogue number: 8752.0 to 8752.7)

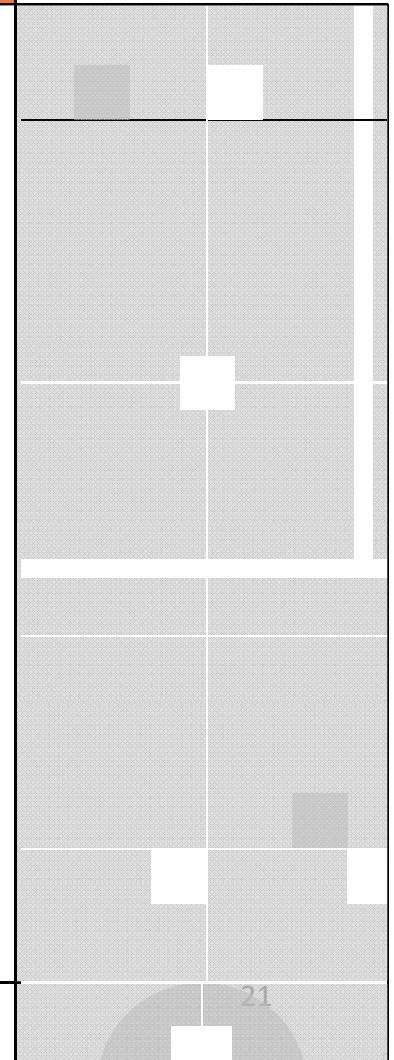


Population quandry?

New dwellings and population growth don't quite add up.

Seem to be adding 4-5 people per dwelling. This is even higher than the national average which is now extremely high.

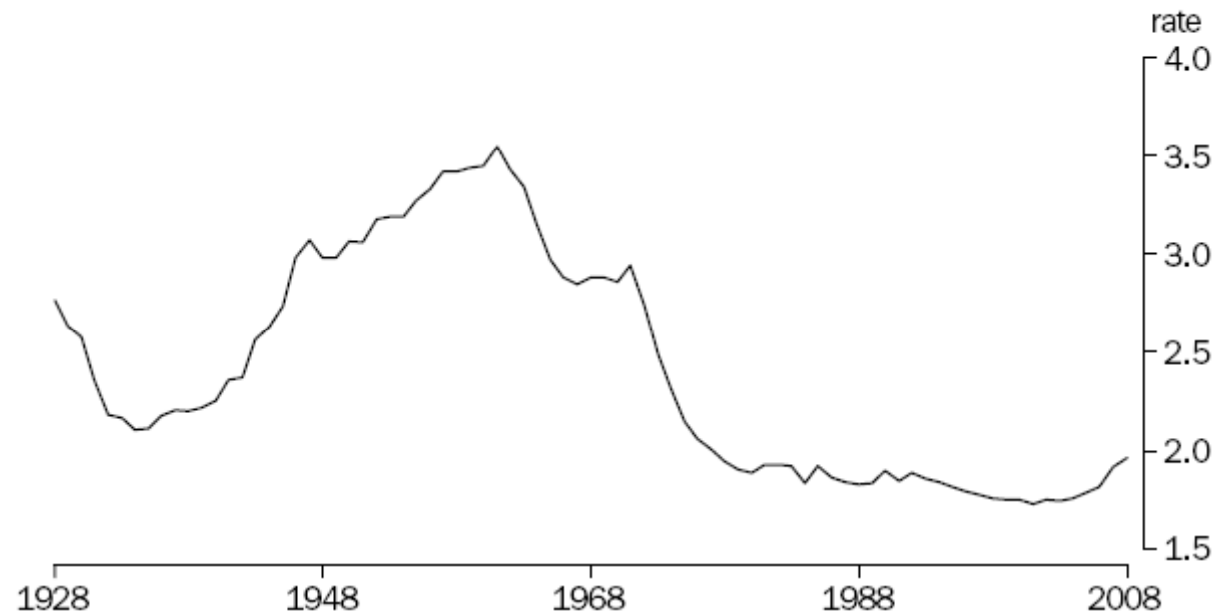
Could it be due to a new baby boom?



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Baby boom?

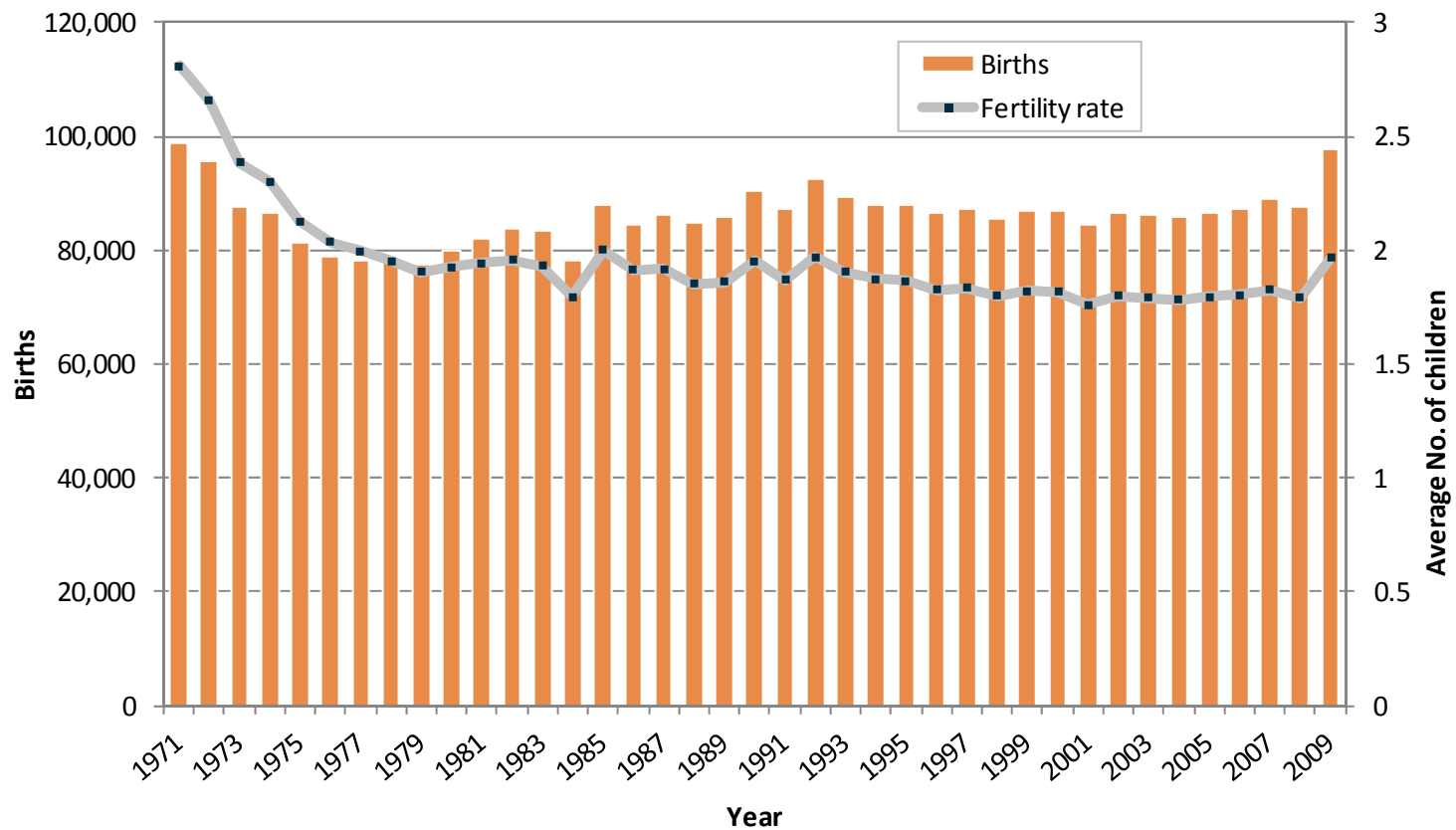
2.1 TOTAL FERTILITY RATE (a), Australia



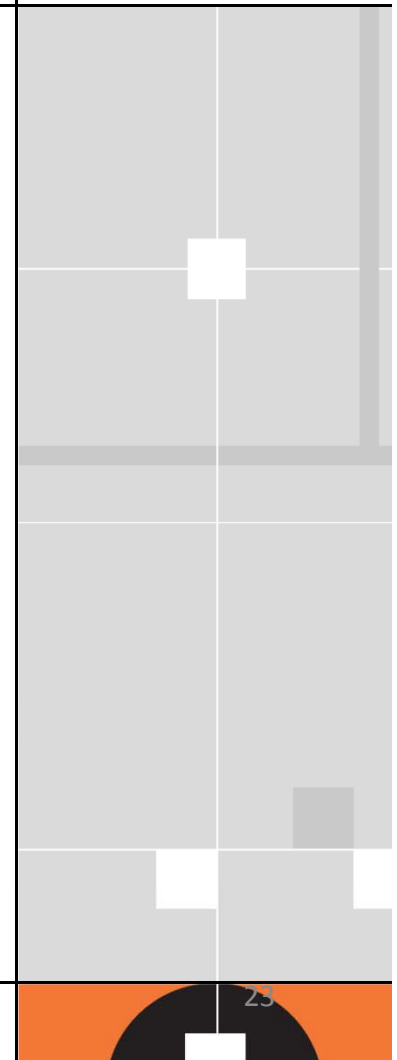
(a) Births per woman.

Source: ABS, Births, Australia, 2008 (3301.0)

Total births and fertility rates, New South Wales, 1971-2009



Source: ABS, Australian Historical Population Statistics, 2008



Births

- All 4 LGAs in Sector Connect have fertility rates above the national and state averages.
- But they haven't experienced the large increases we've seen in some areas.
- 2008 – 4,186 births, up by 250 from the year before.
- Birth rates across Australia have been increasing since 2002.
- National fertility rate 1.97 births/female resident
- Campbelltown 1.98, others just over 2.0.
- Also 1,536 deaths in the region in 2008.

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Summary

- “Natural” growth in the Sector Connect region about 2,600 per year.
- Remaining 2,800 growth 2008-09 must be due to migration.
But from where?
- Building about 1,100 new dwellings per year, easily enough to accommodate this at existing average household size.
- But prior to 2006, these dwellings were being built, but mainly accommodating smaller households.

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Summary

- Where is everyone living?
 - Increasing household size?
 - Households bunching up in existing dwellings?
 - Less retirement, more families?
 - Children staying home longer?
- We may not know until after the next Census.



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Ageing population?

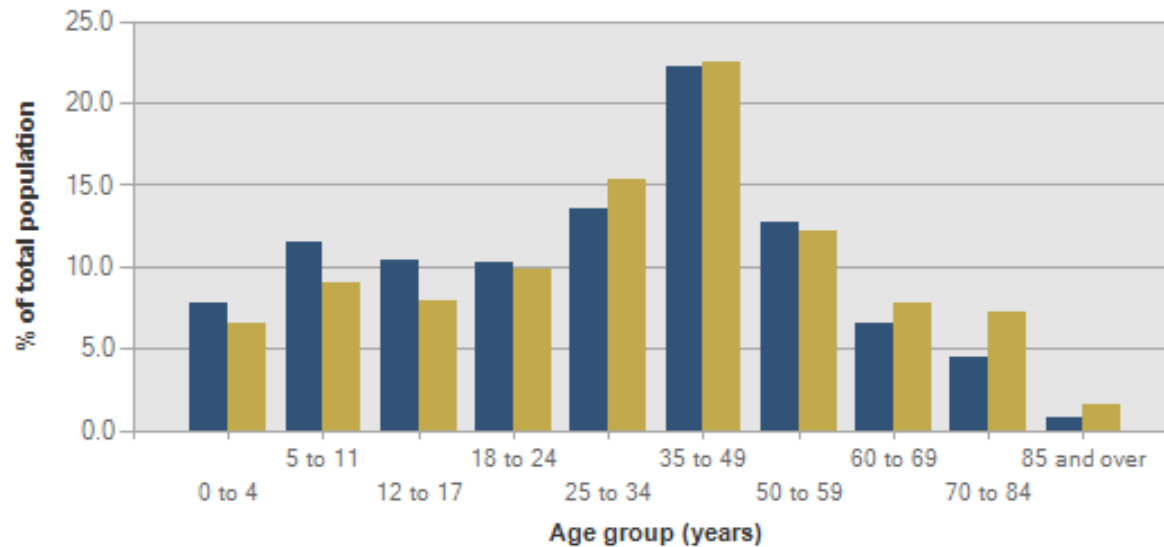
- The trend towards ageing in Australian society is well established.
- Campbelltown had a high level of ageing between 2001-2006, as young people left.
- Migration underpins some of the growth in the region, but not to the same extent as areas to the north.

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Ageing population?

Age structure of MACROC and Sydney Statistical Division, 2006 (Enumerated data)

■ MACROC
■ Sydney Statistical Division

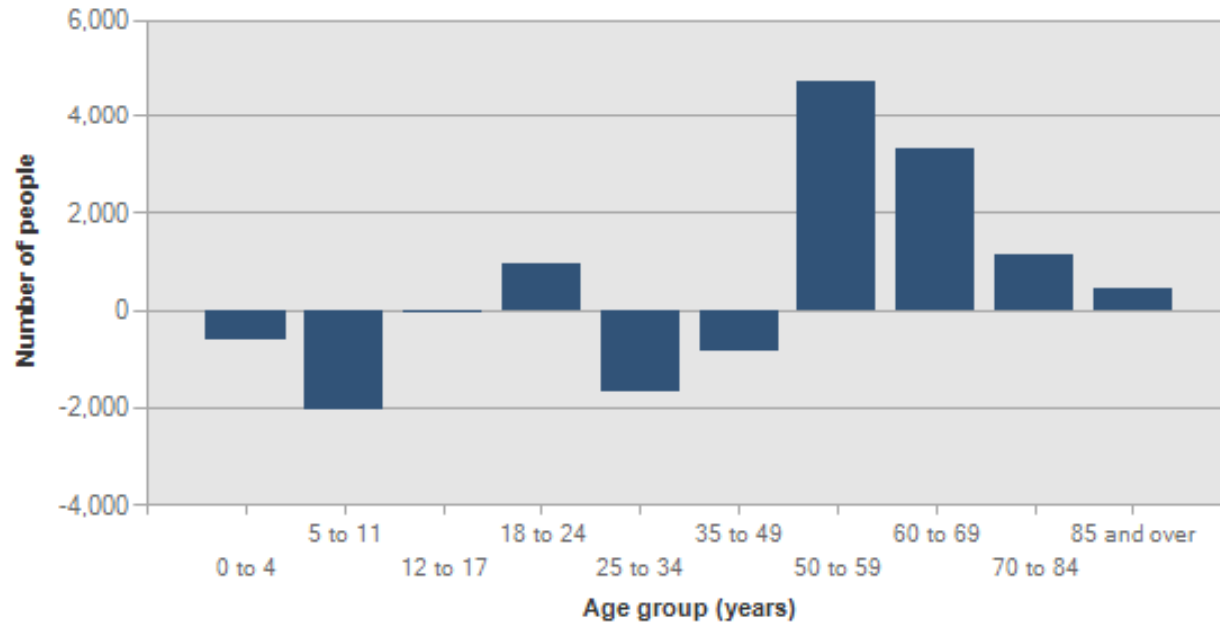


Source: Australian Bureau of Statistics, 2006 Census of Population and Housing (Enumerated)

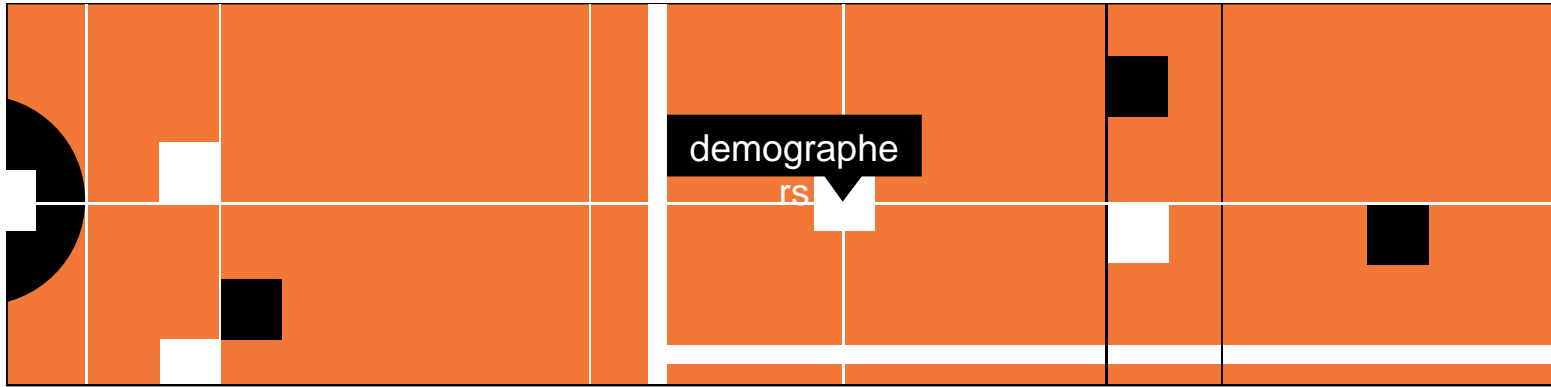
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Ageing population?

Change in age structure of MACROC, 2001 to 2006 (Enumerated data)

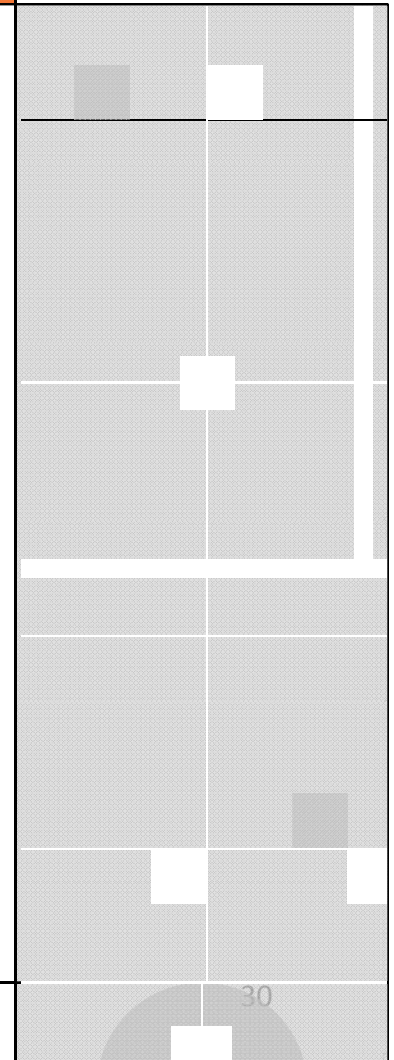


Source: Australian Bureau of Statistics, 2006 and 2001 Census of Population and Housing (Enumerated)



Ageing population?

[Forecast age structure for Campbelltown, 2031](#)





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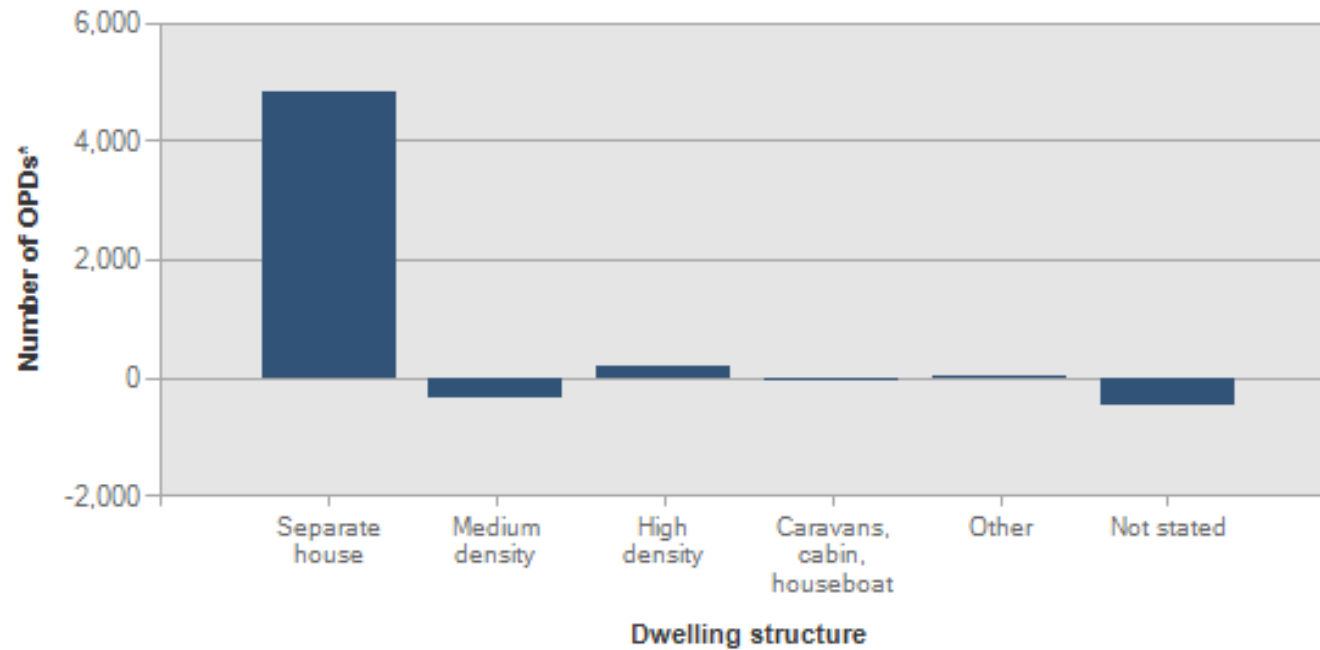
Ageing population?

- There will be a need for significantly more aged care, and regular dwellings suited to elderly residents.
- While the influx of growth in metro strategy growth corridors will be younger, a lot of the population increase will still be elderly, particularly in Campbelltown.

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Dwelling growth

Change in dwelling structure, MACROC, 2001 to 2006 (Enumerated data)

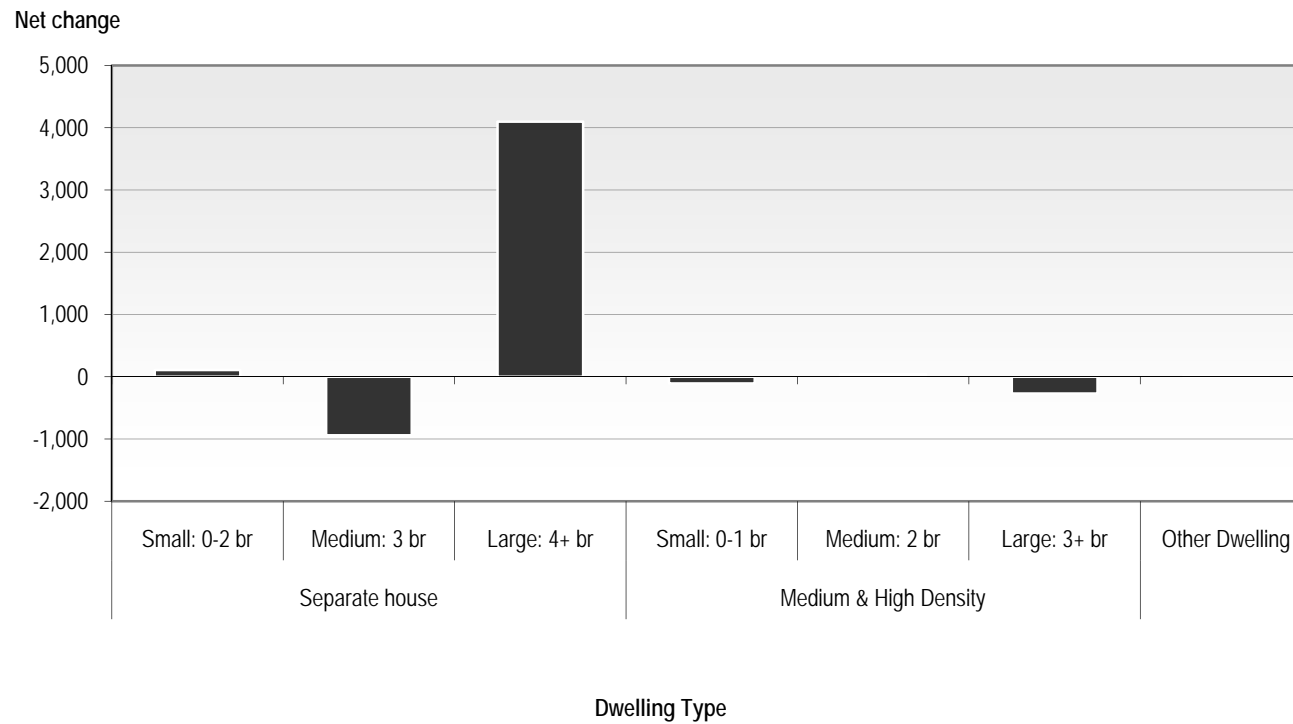


*OPDs refers to Occupied Private Dwellings.
Source: Australian Bureau of Statistics, 2006 and 2001 Census of Population and Housing (Enumerated)

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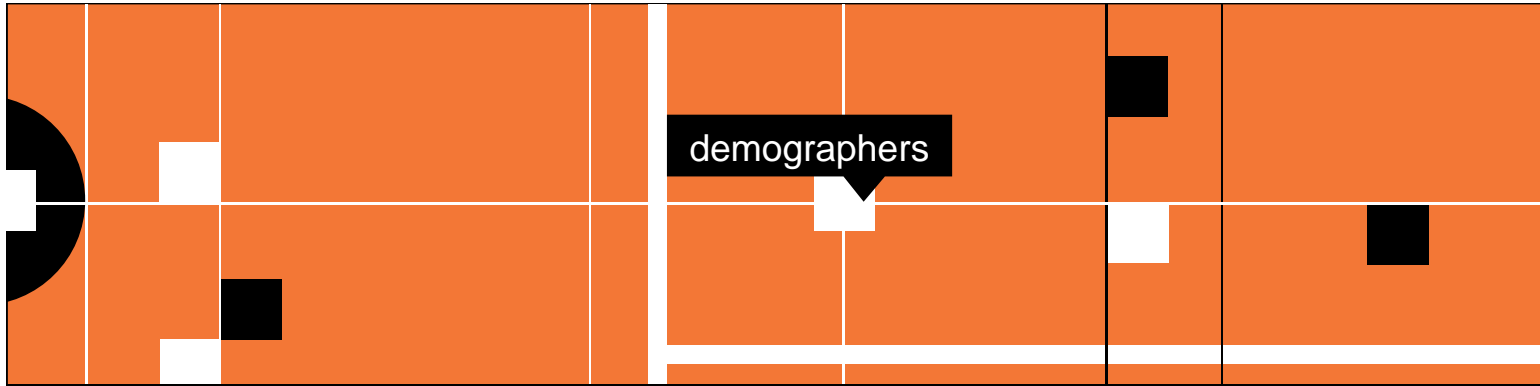
Dwelling growth

Net change in dwellings over 10 years, Campbelltown



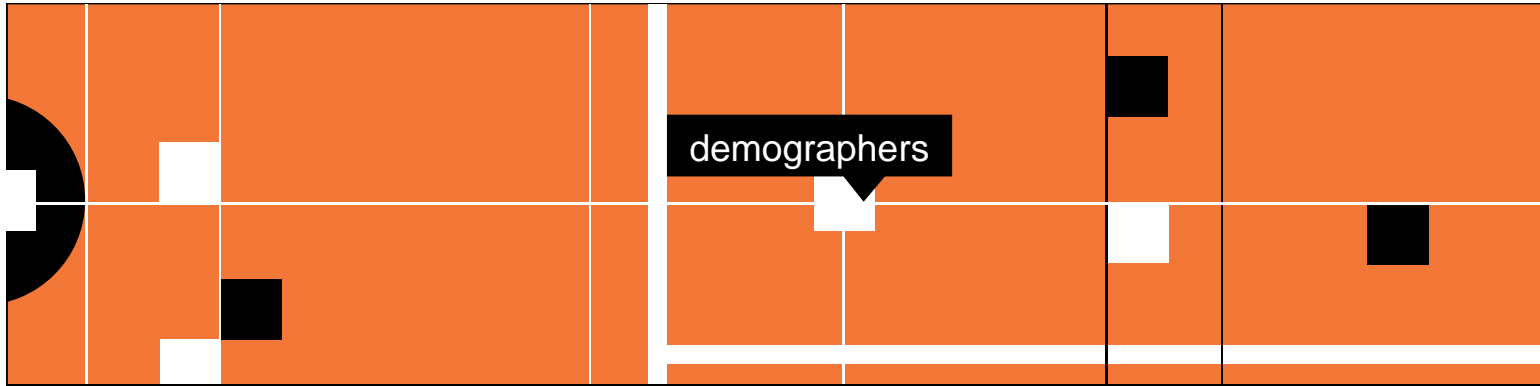
Things to think about

- What impact will a higher birth rate have on children's services?
- How will the ageing of the population in place impact HACC services etc?
- Will MACROC retain a younger population in future? Where will employment come from?
- What types of housing will be needed to cater for this population?



Use the tools

- Campbelltown, Camden and Wollondilly have a range of tools to help understand key trends and plan for the future of the City.
- .id is available to help and provide training
- Every department that serves the community will be influenced by the changing demographic landscape – so please encourage your staff to understand the tools and how to use them.



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Use the tools.

Online now:

profile.id – understand your communities now and in the past.

<http://www.id.com.au/profile/MACROC>

<http://www.id.com.au/profile/campbelltown>

<http://www.id.com.au/profile/camden>

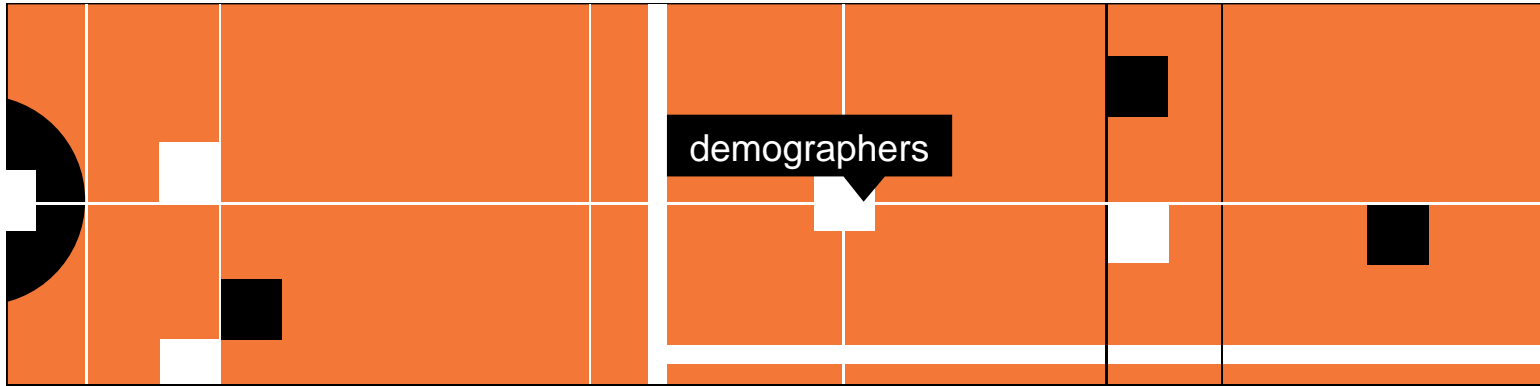
<http://www.id.com.au/profile/wollondilly>

atlas.id – understand the spatial distribution of characteristics

<http://www.id.com.au/atlas/campbelltown>

<http://www.id.com.au/atlas/camden>

<http://www.id.com.au/atlas/wollondilly>



Use the tools.

Online now:

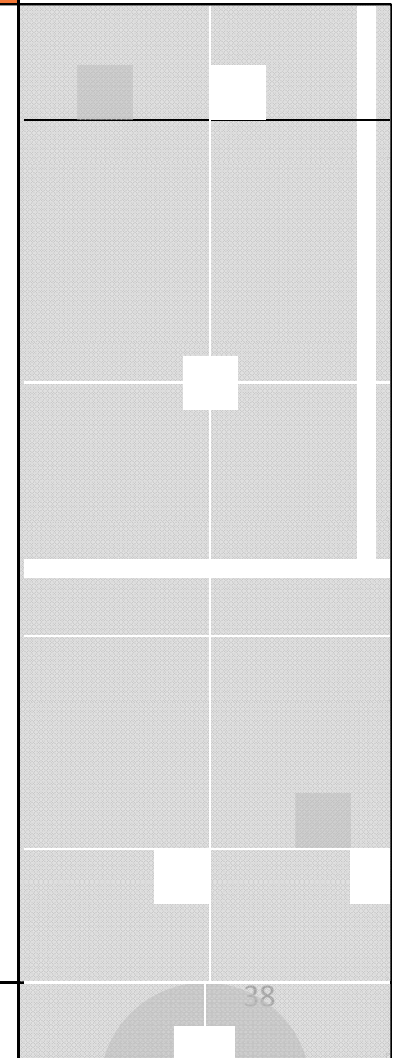
forecast.id – understand how your communities will change in the future.

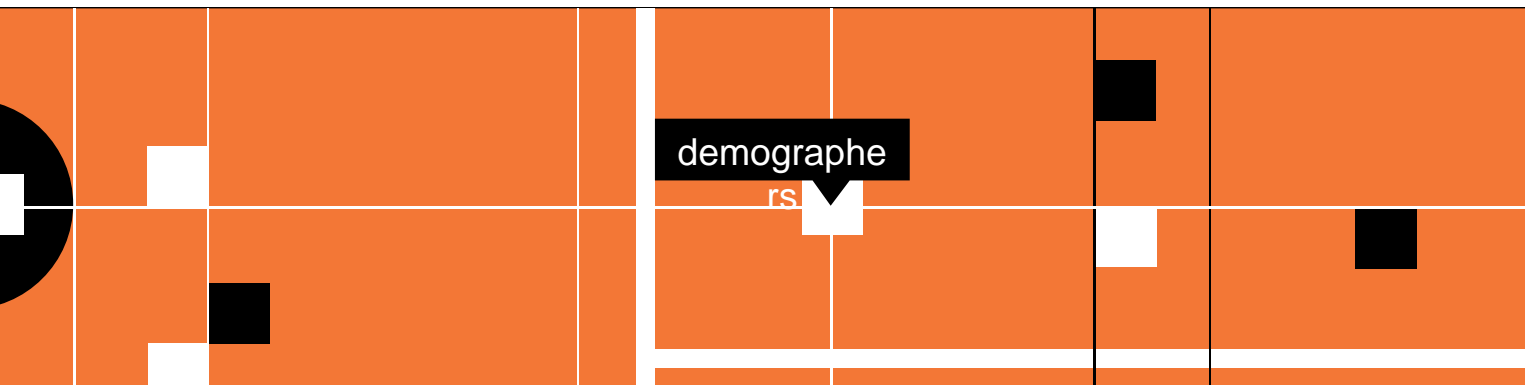
<http://www.id.com.au/forecast/campbelltown>

<http://www.id.com.au/forecast/wollondilly>

Forecasts are available for councils which currently don't have them. Forecast is approximately a 4-6 month process, with key input from council, and regular reviews.

Profile and atlas are available immediately for Wingecarribee, including Census updates.



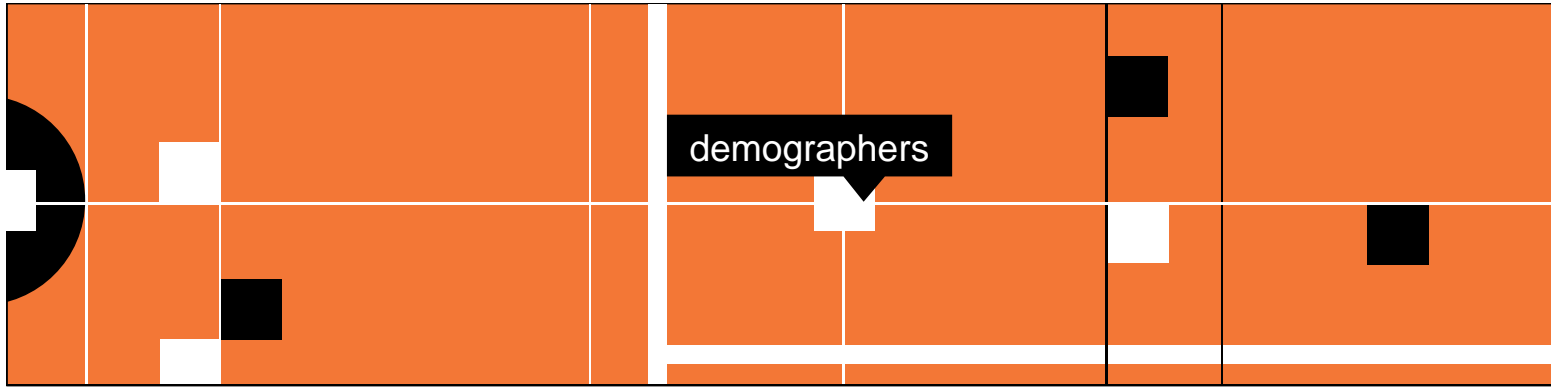


Taking it further.

Also available:

economy.id:

- Understand your economic role and function.
- Spatial distribution of industries across the LGA.
- Characteristics of the workforce in each industry
- Wider labour force region accessible to business.
- Promote your area to new business.



Questions?

