

National Growth Areas Alliance



A snapshot of Australia's fast growing outer suburbs
Presentation for the NGAA Conference, City of Swan,
November 2019



About .id at the National Growth Areas Alliance

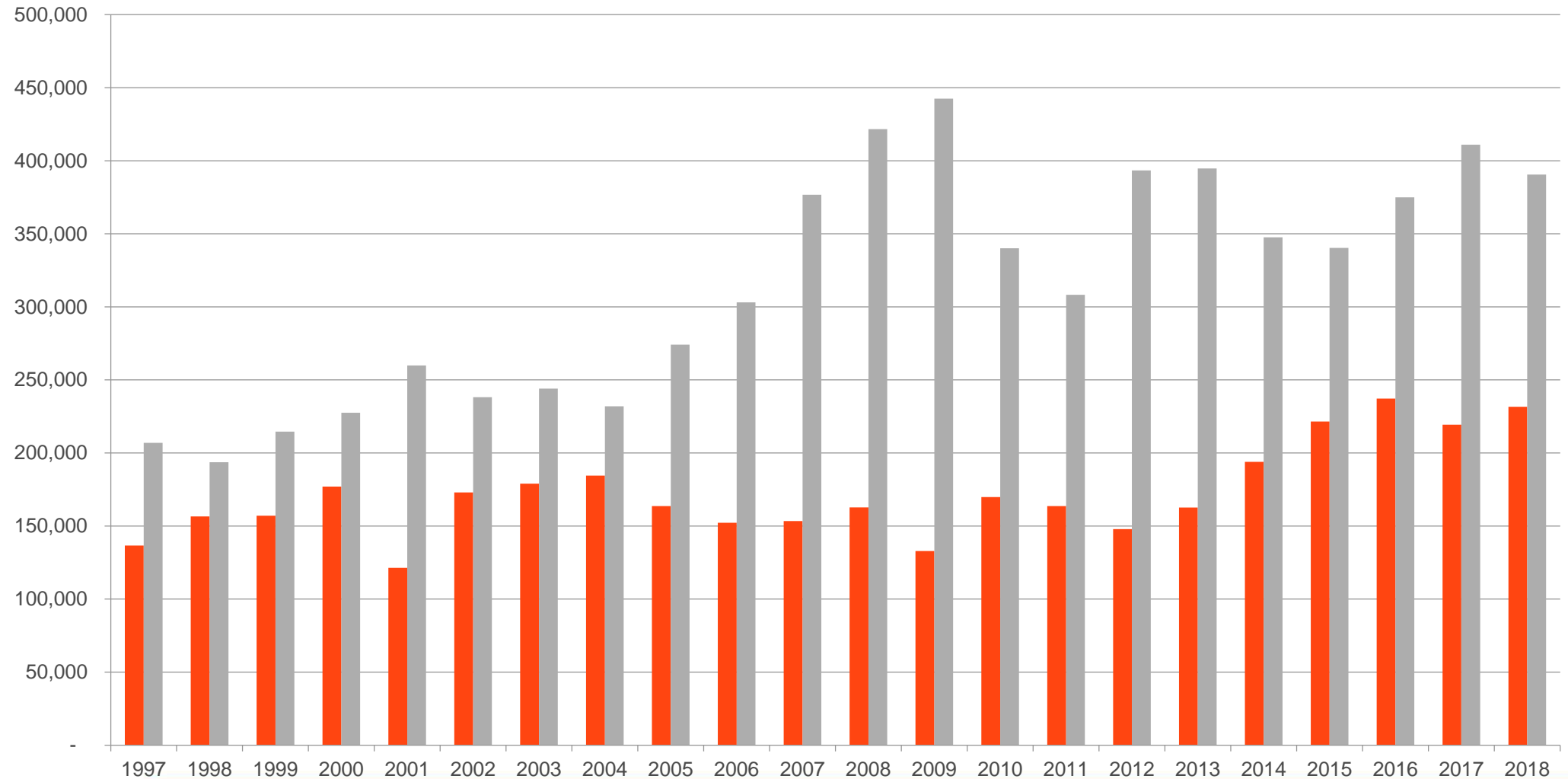
.id is a company of demographers, housing analysts, forecasters and Census data experts who have developed demographic information products specifically for the Australian Local Government market. “id” stands for “informed decisions”.

We work with our clients to promote evidence-based decision making, consulting with you for grant funding applications, demographic and economic studies and advocacy.

We have been working with the NGAA providing population profiles, forecasts and consultancy expertise for the past 10 years.

National population and dwelling growth

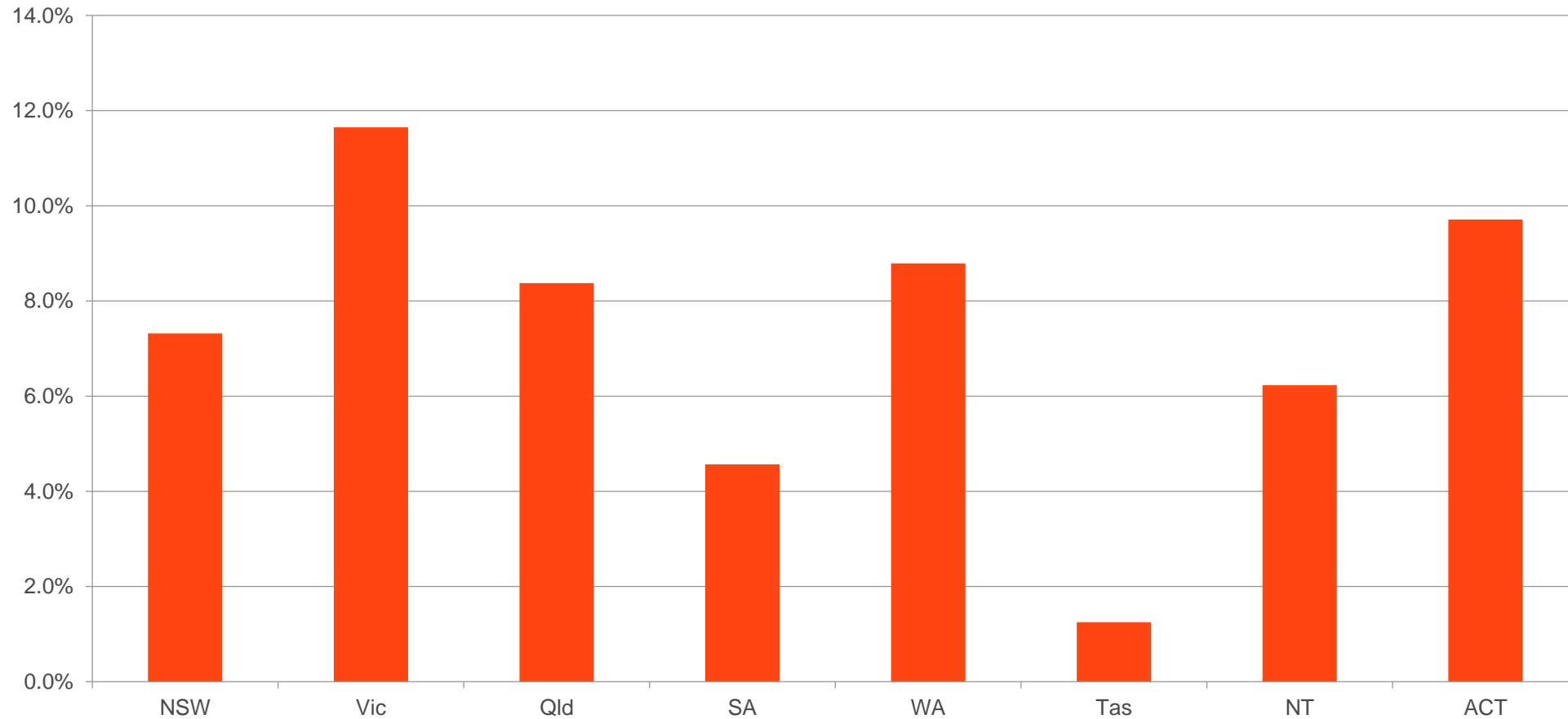
■ Building Approvals ■ Population Growth



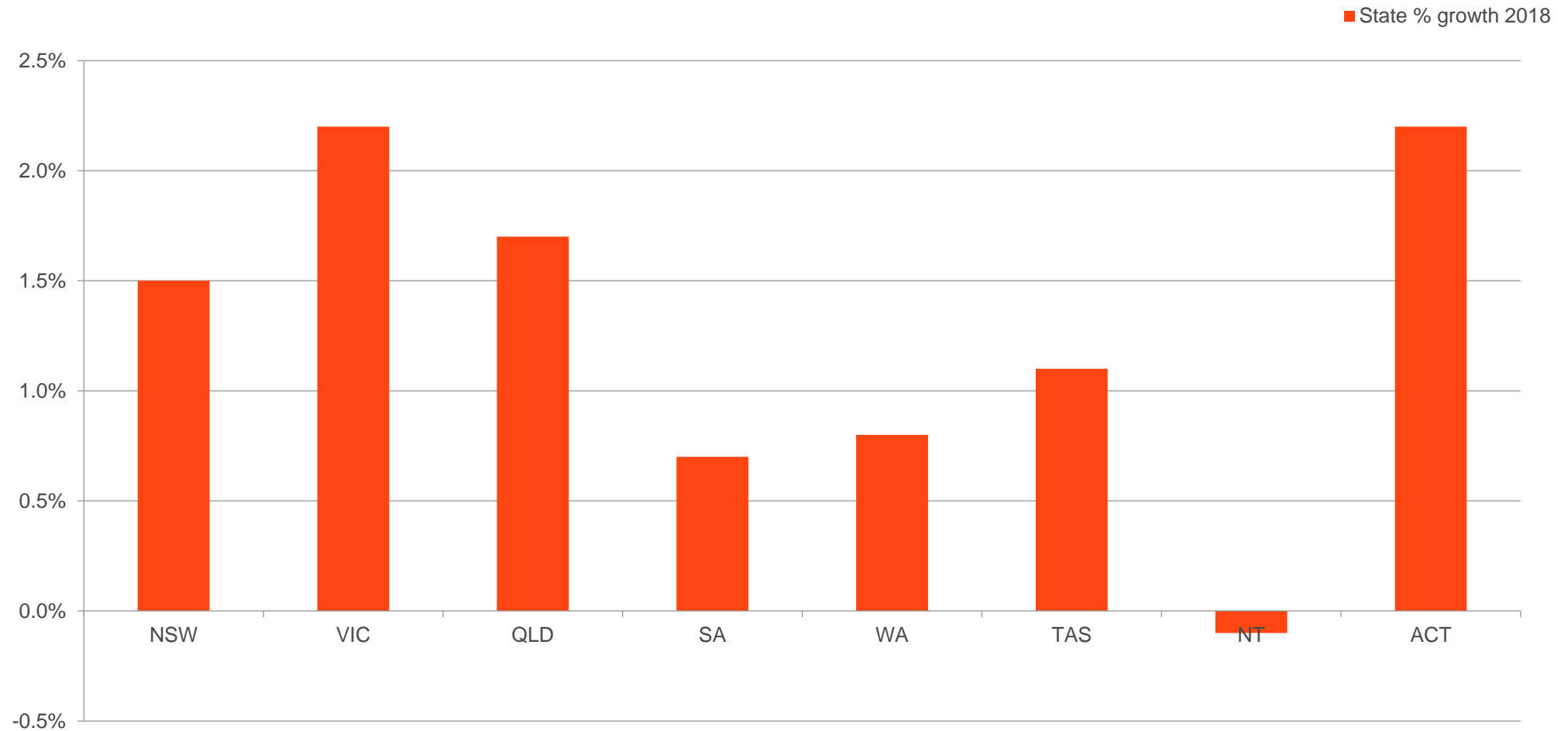
Comparative growth among the states – 2011-16

State % growth 2011-2016

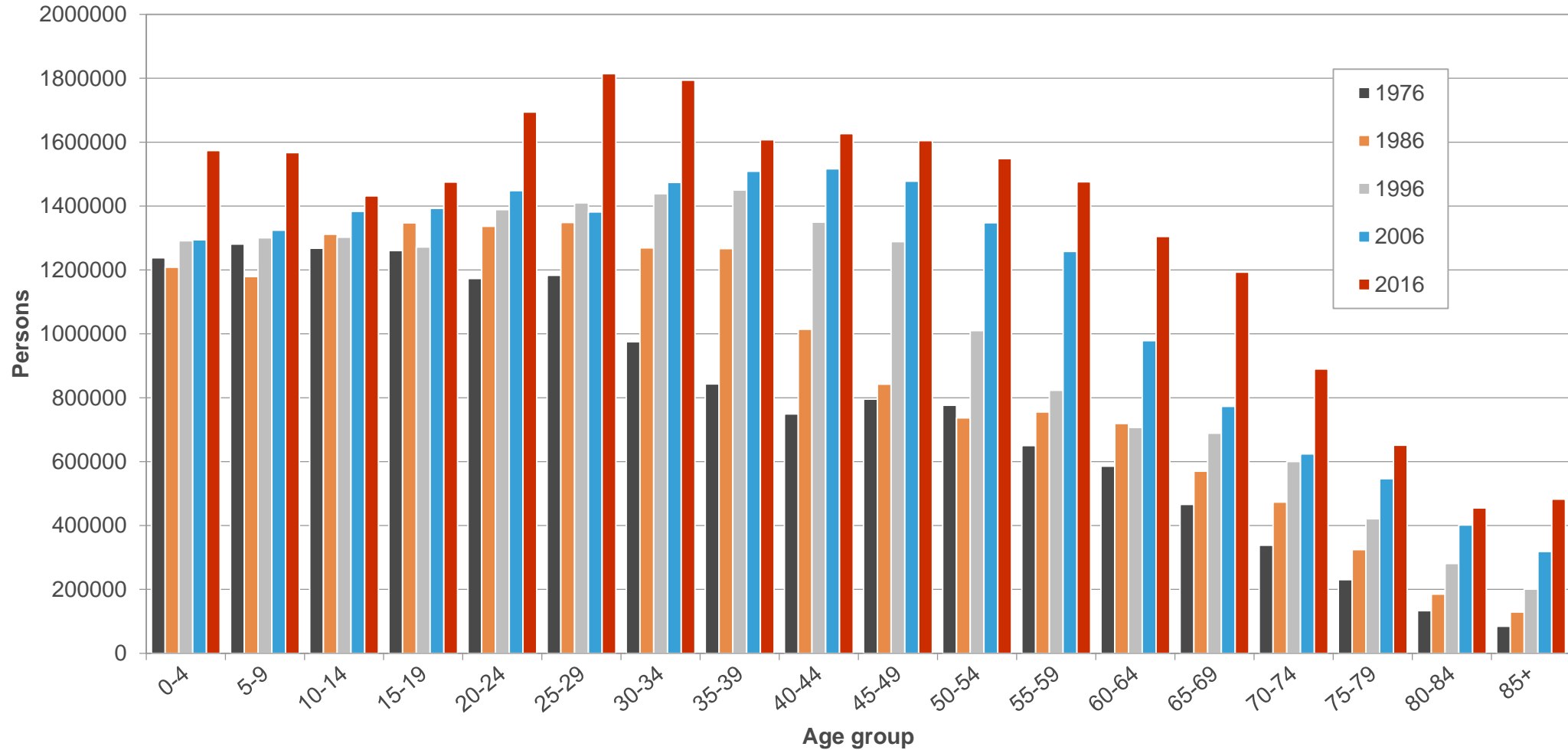
■ 5 year growth %



Comparative growth among the states – 1 year

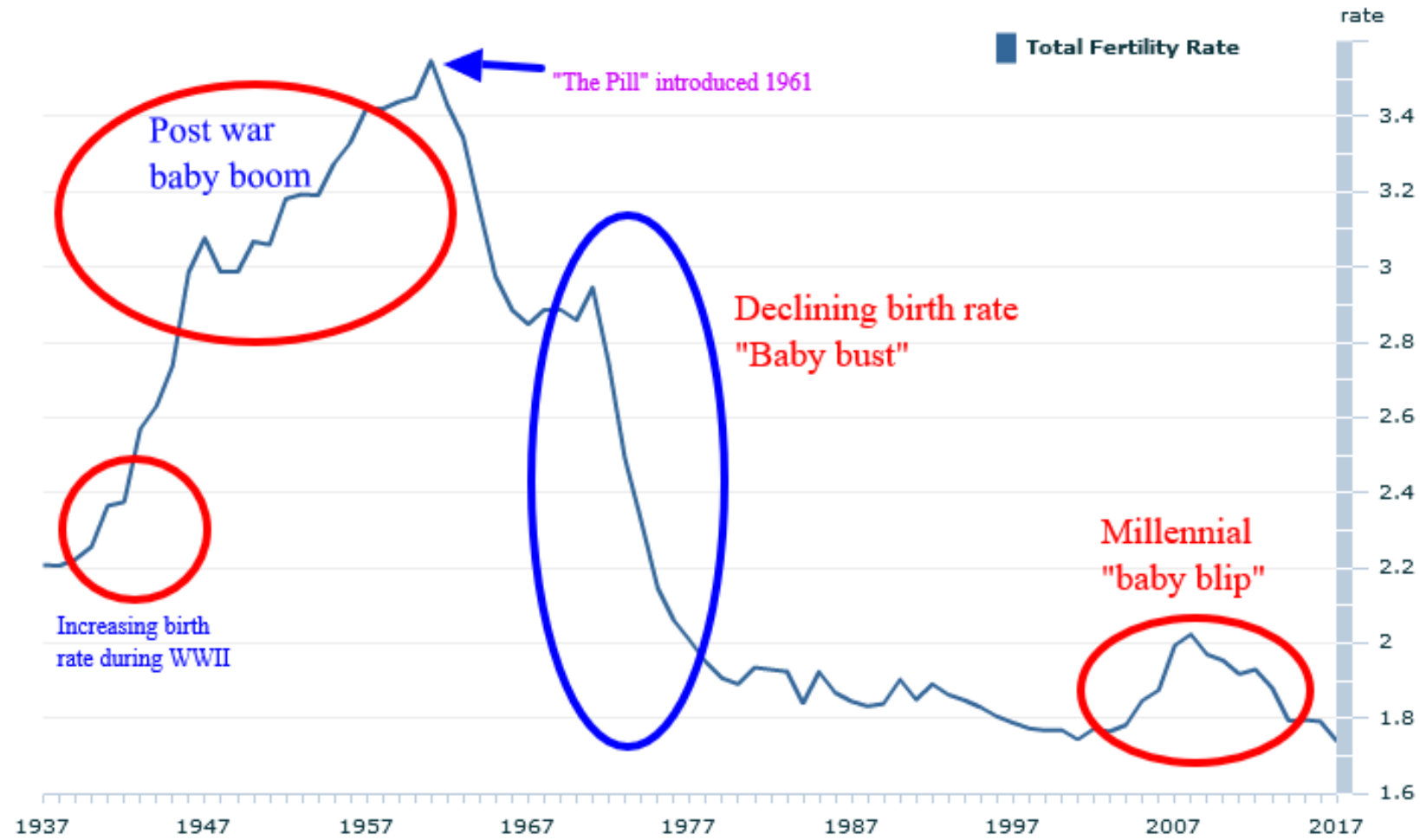


Population by 5 year age groups over 40 years, Australia



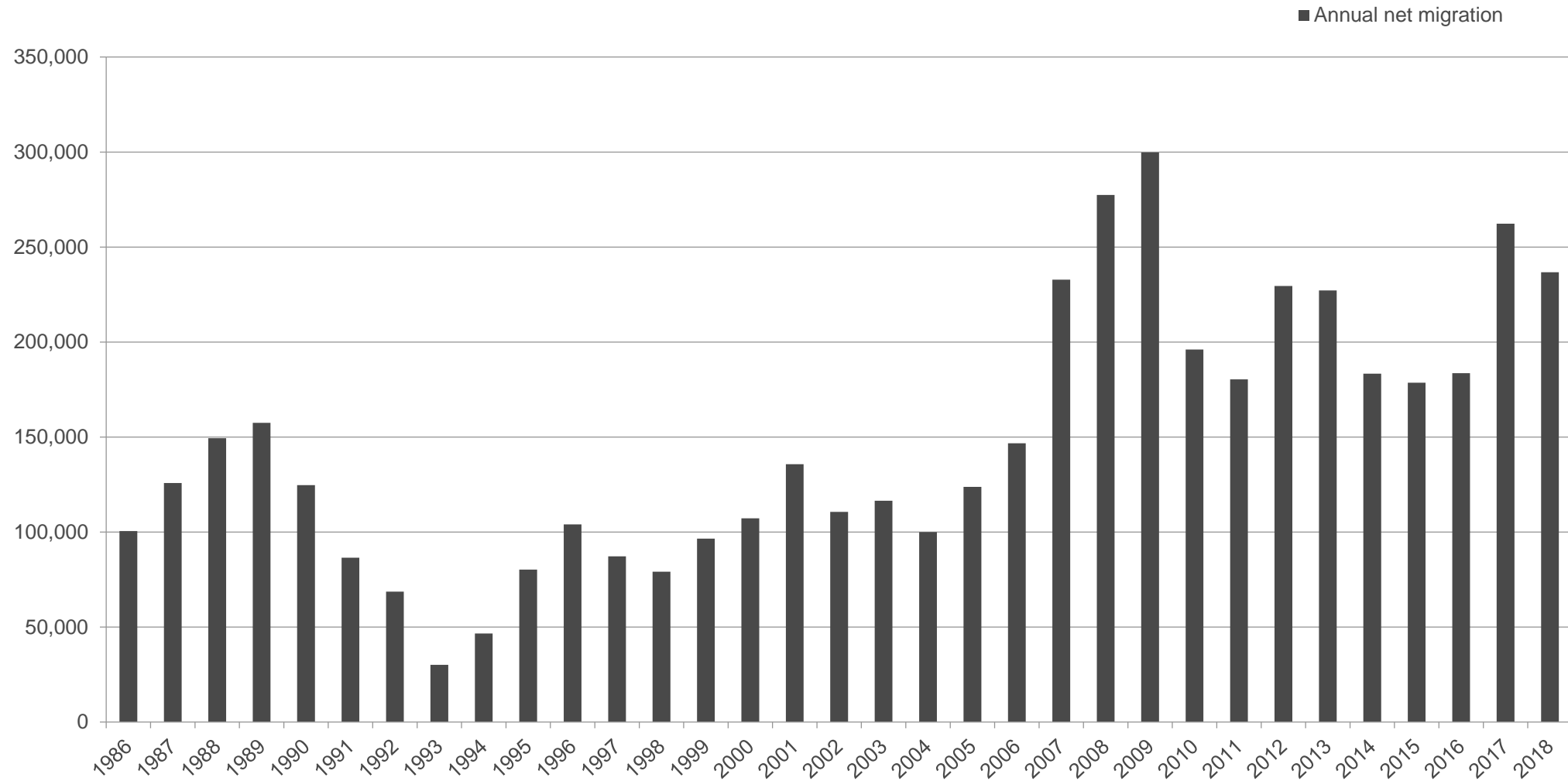
National fertility rate, 1937 to 2017

Total Fertility Rate, Australia - 1937 to 2017(a)



Source: ABS, Births Australia, 2017, 3301.0

Historical migration - national



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- Online information tool, for NGAA staff, council staff, and for the public.
- 1991, 1996, 2001, 2006, 2011 and 2016 Census data.
- A range of demographic topics for telling the changing story of your area.
- Each NGAA council is represented, along with the group as a whole.
- Detailed migration and SEIFA datasets.
- Reporting and data export options designed to integrate with other output tools.
- <http://profile.id.com.au/ngaa>

Measure	Australia	Growth Areas (NGAA)	% of Australia in the NGAA
Population 2018	24,981,326	4,950,082	19.8%
Growth (5 years to 2018)	+1,505,640 (+6.5%)	+675,040 (+15.8%)	44.8%
Median age	38 (+1 year)	34 (Unchanged)	
Language other than English	20.8% +2.7% in 5 years	24.7% + 3.9% in 5 years	22.8%

Measure	Australia	Growth Areas (NGAA)	% of Australia in the NGAA
Dwellings	9,924,844 (+8.5%)	1,650,466 (+15.1%)	27.6% of dwelling growth
Unoccupied dwellings	10.5%	7.1%	
Average household size	2.55 (unchanged)	2.87 (+0.01)	NGAA households have about a third of a person more than the Australian average.

Population trends by LGA – NSW and Vic

NGAA area	2018	2013	2008	5 year change	10 year change
Blacktown City	366,534	324,797	292,002	12.9%	25.5%
Camden Council	94,159	64,093	53,736	46.9%	75.2%
Campbelltown City	168,139	154,348	148,407	8.9%	13.3%
Liverpool City	223,304	196,122	177,372	13.9%	25.9%
Penrith City	209,210	190,527	179,851	9.8%	16.3%
The Hills Shire	172,473	152,429	141,230	13.1%	22.1%
Wollondilly Shire	52,230	46,399	42,401	12.6%	23.2%
Shire of Cardinia	107,120	84,591	63,647	26.6%	68.3%
City of Casey	340,419	278,023	237,529	22.4%	43.3%
City of Hume	224,394	184,873	161,863	21.4%	38.6%
City of Melton	156,713	123,936	92,552	26.4%	69.3%
Shire of Mitchell	44,299	37,788	32,302	17.2%	37.1%
City of Whittlesea	223,322	179,272	138,446	24.6%	61.3%
City of Wyndham	255,322	190,211	133,063	34.2%	91.9%
National Growth Areas Alliance (NGAA)	4,950,082	4,271,536	3,647,567	15.9%	35.7%

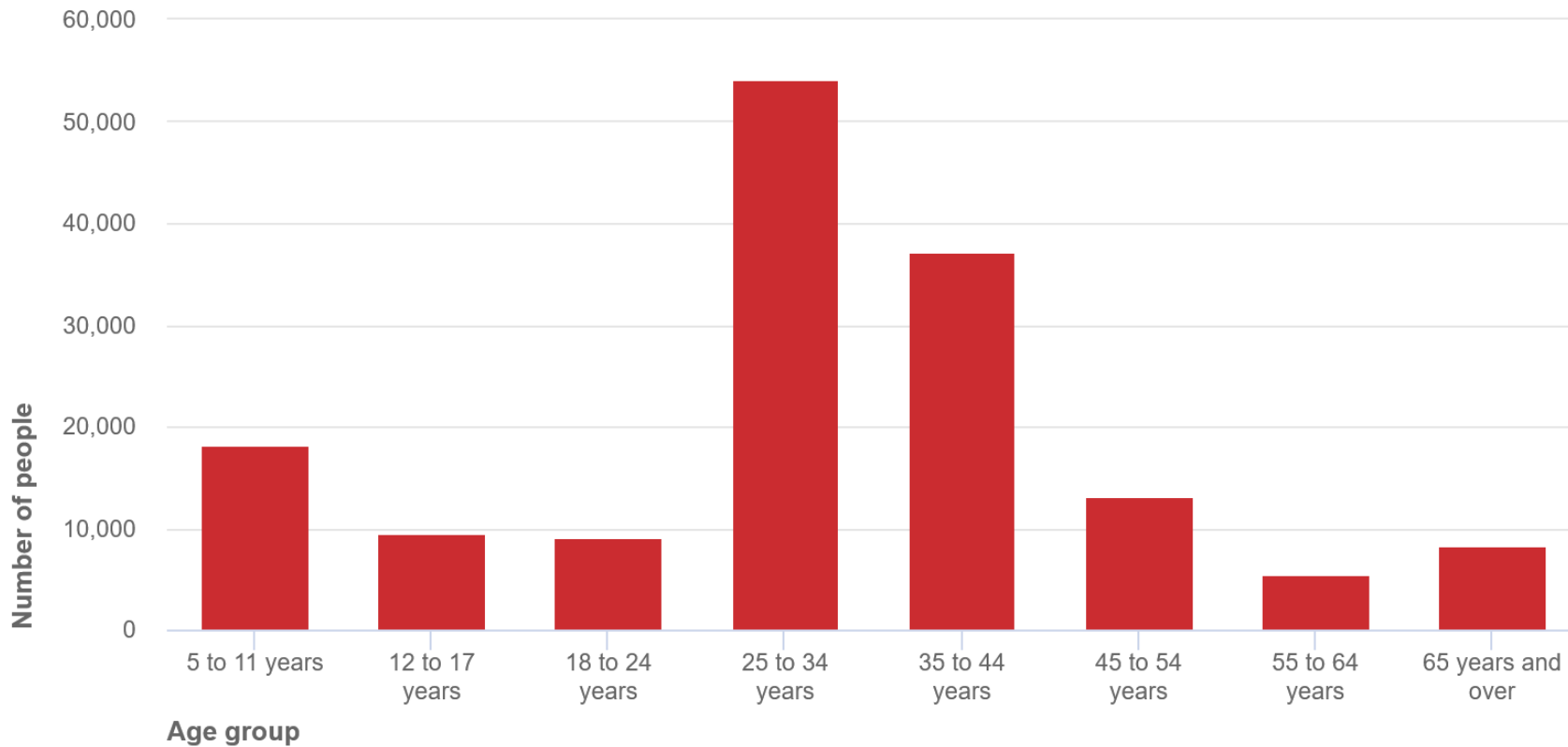
Population trends by LGA – Qld, SA, WA, NT

NGAA area	2018	2013	2008	5 year change	10 year change
City of Ipswich	213,638	183,688	154,428	16.3%	38.3%
Logan City	326,615	300,545	270,628	8.7%	20.7%
Moreton Bay Region	459,585	410,687	357,499	11.9%	28.6%
Redland City	156,863	147,328	136,771	6.5%	14.7%
District Council of Mount Barker	35,545	31,580	28,695	12.6%	23.9%
City of Playford	93,426	85,232	74,514	9.6%	25.4%
City of Armadale	87,634	72,662	55,809	20.6%	57.0%
City of Cockburn	112,165	102,787	84,909	9.1%	32.1%
City of Gosnells	123,325	119,381	101,907	3.3%	21.0%
City of Kwinana	43,511	34,707	26,482	25.4%	64.3%
City of Mandurah	85,302	79,292	64,940	7.6%	31.4%
City of Rockingham	133,389	119,300	96,506	11.8%	38.2%
Shire of Serpentine-Jarrahdale	30,933	22,011	15,224	40.5%	103.2%
City of Swan	143,374	123,643	103,027	16.0%	39.2%
City of Wanneroo	203,679	176,627	135,840	15.3%	49.9%
Shire of Litchfield	25,598	22,195	18,401	15.3%	39.1%
City of Palmerston	37,862	32,462	27,586	16.6%	37.3%
National Growth Areas Alliance (NGAA)	4,950,082	4,271,536	3,647,567	15.9%	35.7%

NGAA in one word – “Families”

Net migration by age group 2016

National Growth Areas Alliance (NGAA)

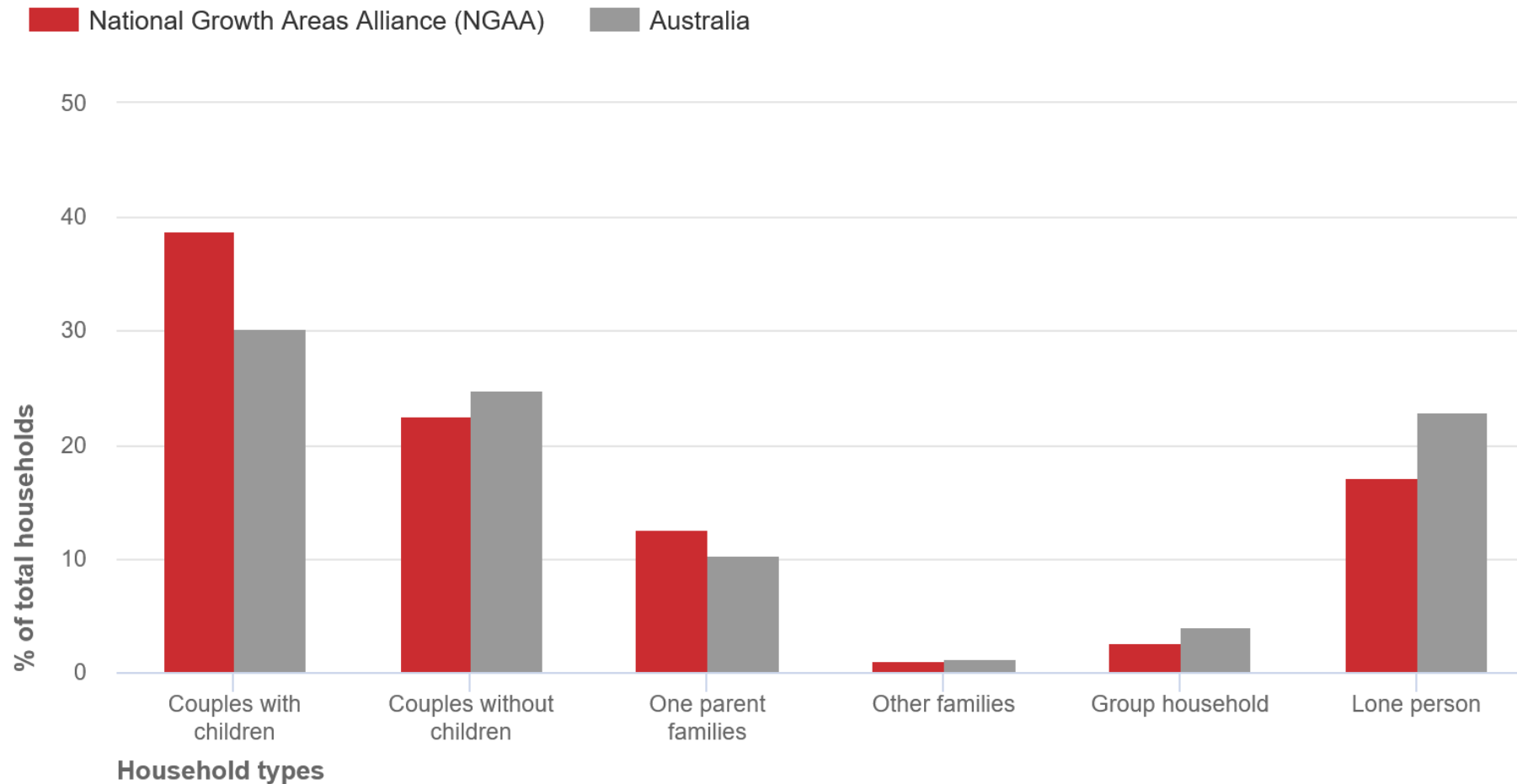


Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residents data). Compiled and presented in profile.id by .id, the population experts.

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NGAA in one word – “Families”

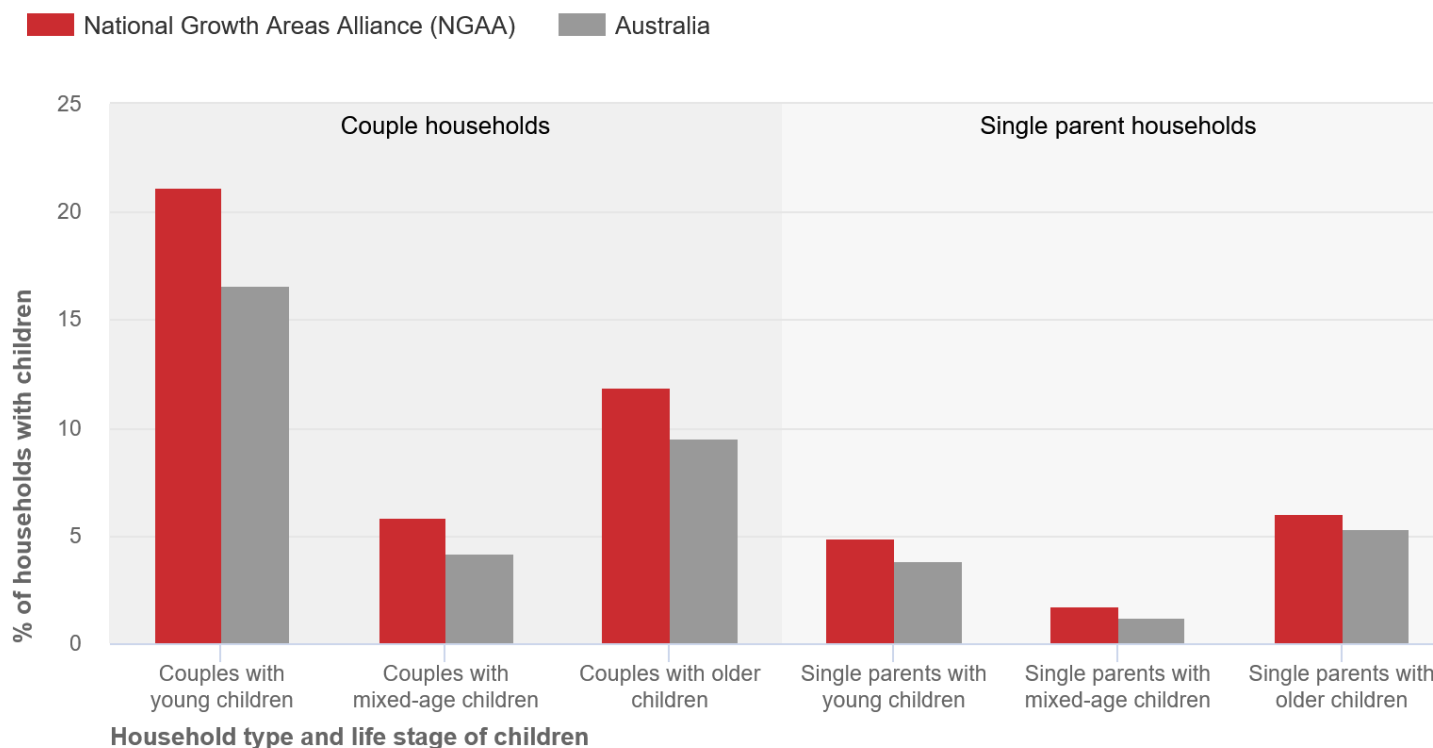
Household type, 2016



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Enumerated data). Compiled and presented in profile.id by .id, the population experts.

NGAA in one word – “Families”

Households with children, 2016



Across NGAA, couple families with young children (all kids <15) increased by 45,300 households – this is 43% of the total increase across Australia, occurring in the NGAA area.

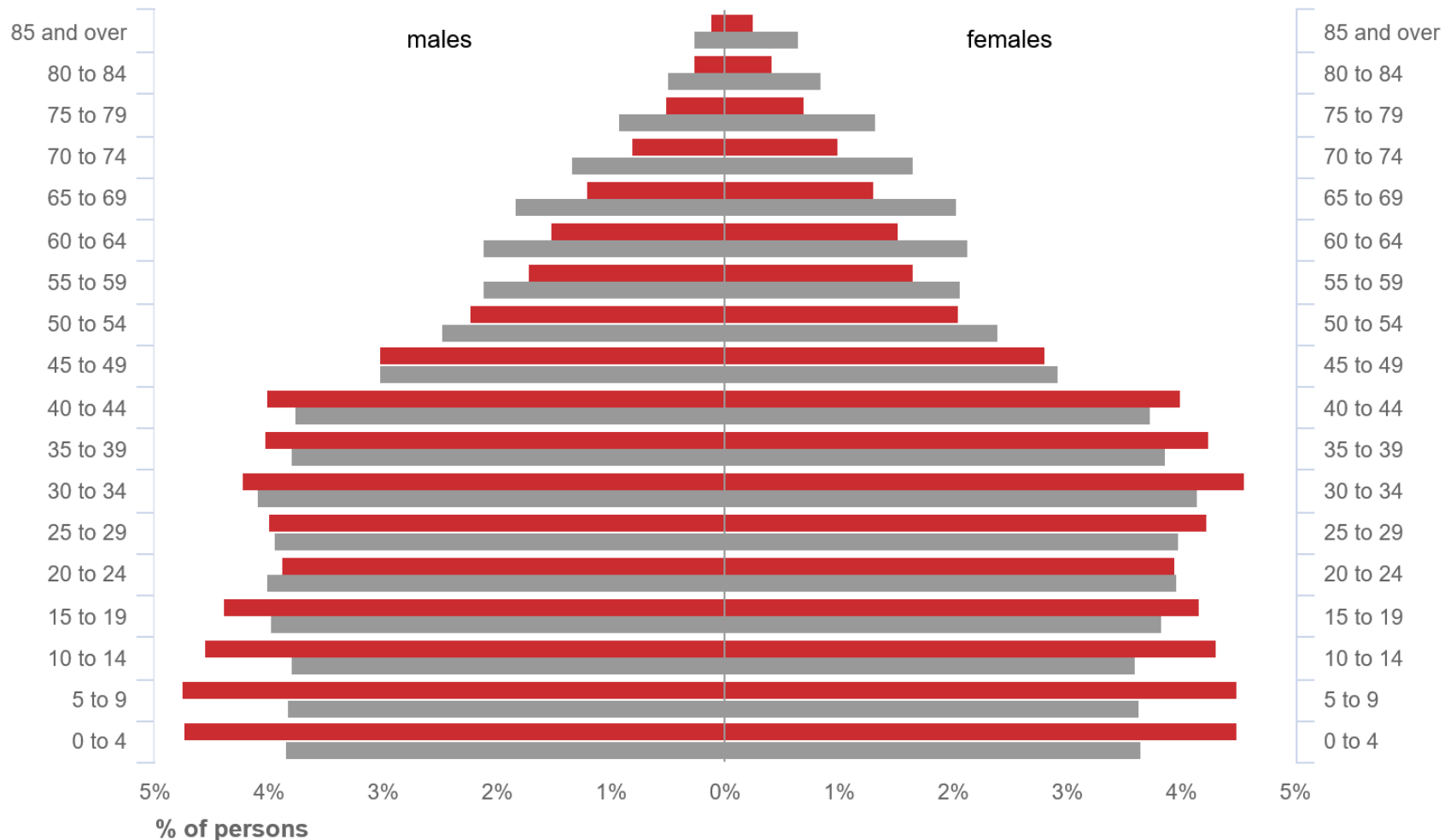
Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Enumerated data). Compiled and presented in profile.id by .id, the population experts.

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NGAA is relatively young, but not as young as it used to be...

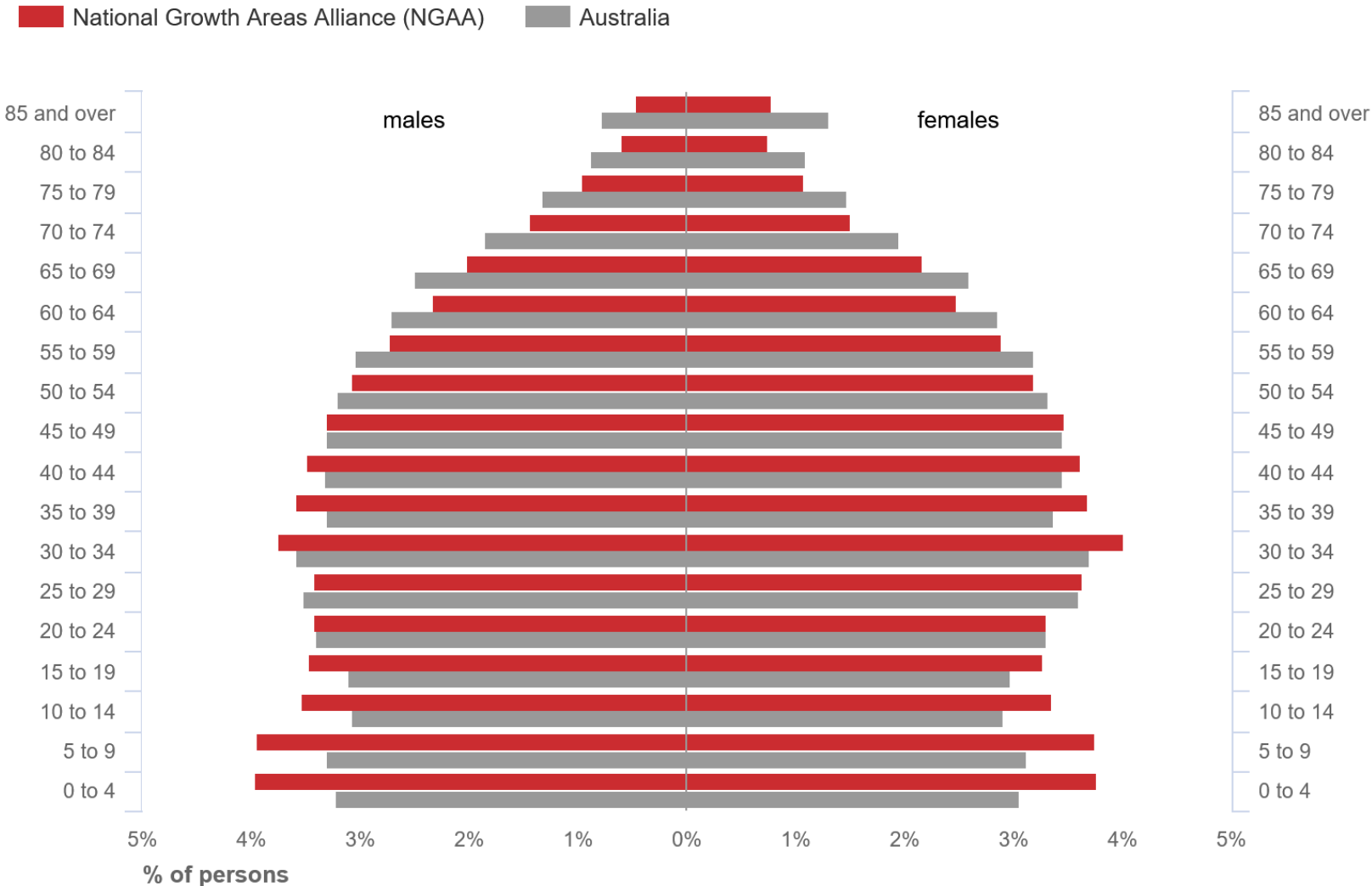
Age-sex pyramid, 1991

■ National Growth Areas Alliance (NGAA) ■ Australia



NGAA is relatively young, but not as young as it used to be...

Age-sex pyramid, 2016



Birth rate in the NGAA

Australia birth rate 2017

1.74 (babies per female)



NGAA birth rate 2017

2.06 (babies per female)



NGAA birth rate is significantly higher than Australia, so more babies, and it keeps the population young. Birth rate is very close to replacement level, with no migration.

Source: ABS, *Births Australia*, 2017, 3301.0

Epicentre of cultural diversity in Australia shifts to the outer suburbs..

In 1996, the NGAA area had 15.2% speaking a language other than English (Australia was 14.5%, so almost the same), and 25.2% overseas-born.

In 2016, NGAA had 30.8% overseas-born and 24.8% speaking a language other than English.

This is an extra 716,000 people speaking a language other than English in 20 years, or about 40% of total population growth.



Cultural diversity

Arrivals 2011-2016 – only 18.8% in the NGAA

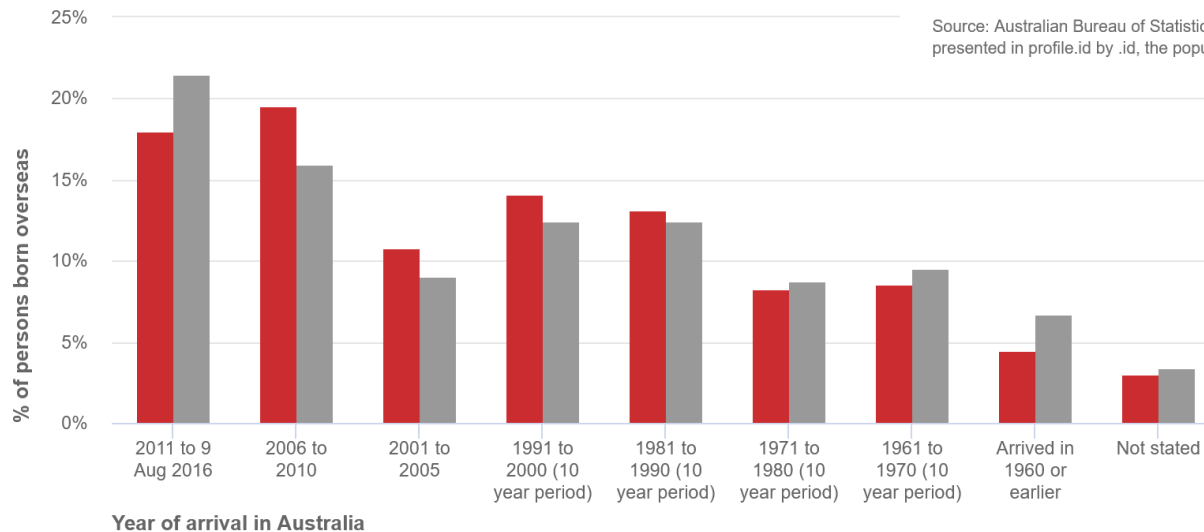
Arrivals 1990-2011 – About 25-30%

NGAA is an UPGRADER area – where migrants move after being in Australia 5-10 years. Where they buy a house.

Overseas arrivals, 2016

Total persons

■ National Growth Areas Alliance (NGAA) ■ Australia

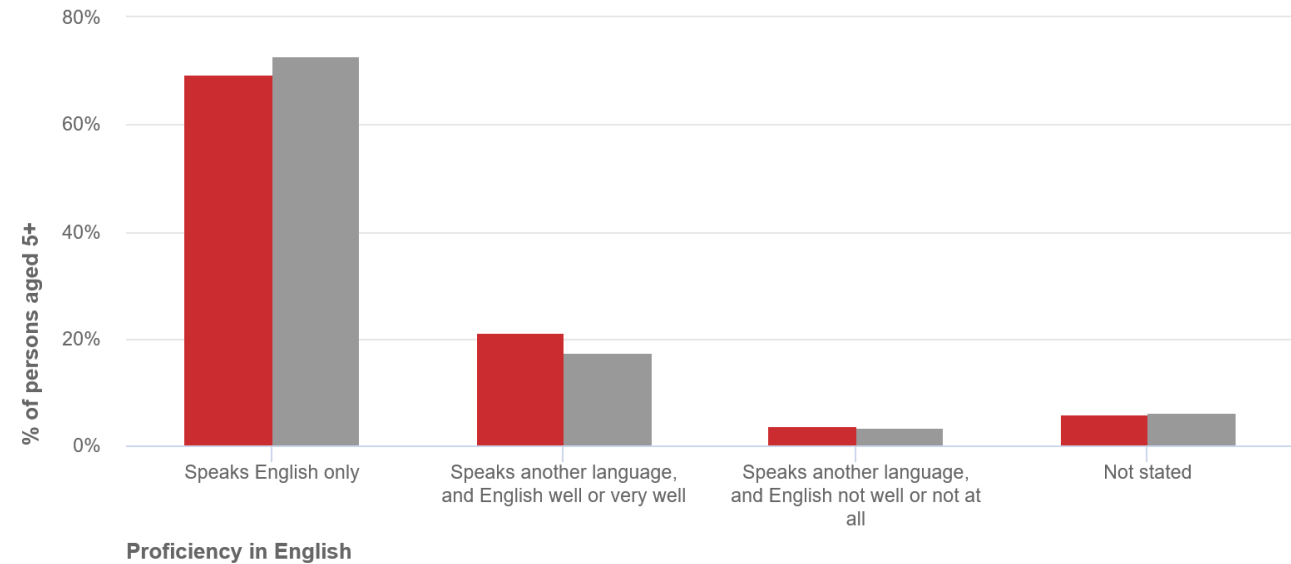


Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Proficiency in English, 2016

Total persons

■ National Growth Areas Alliance (NGAA) ■ Australia



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

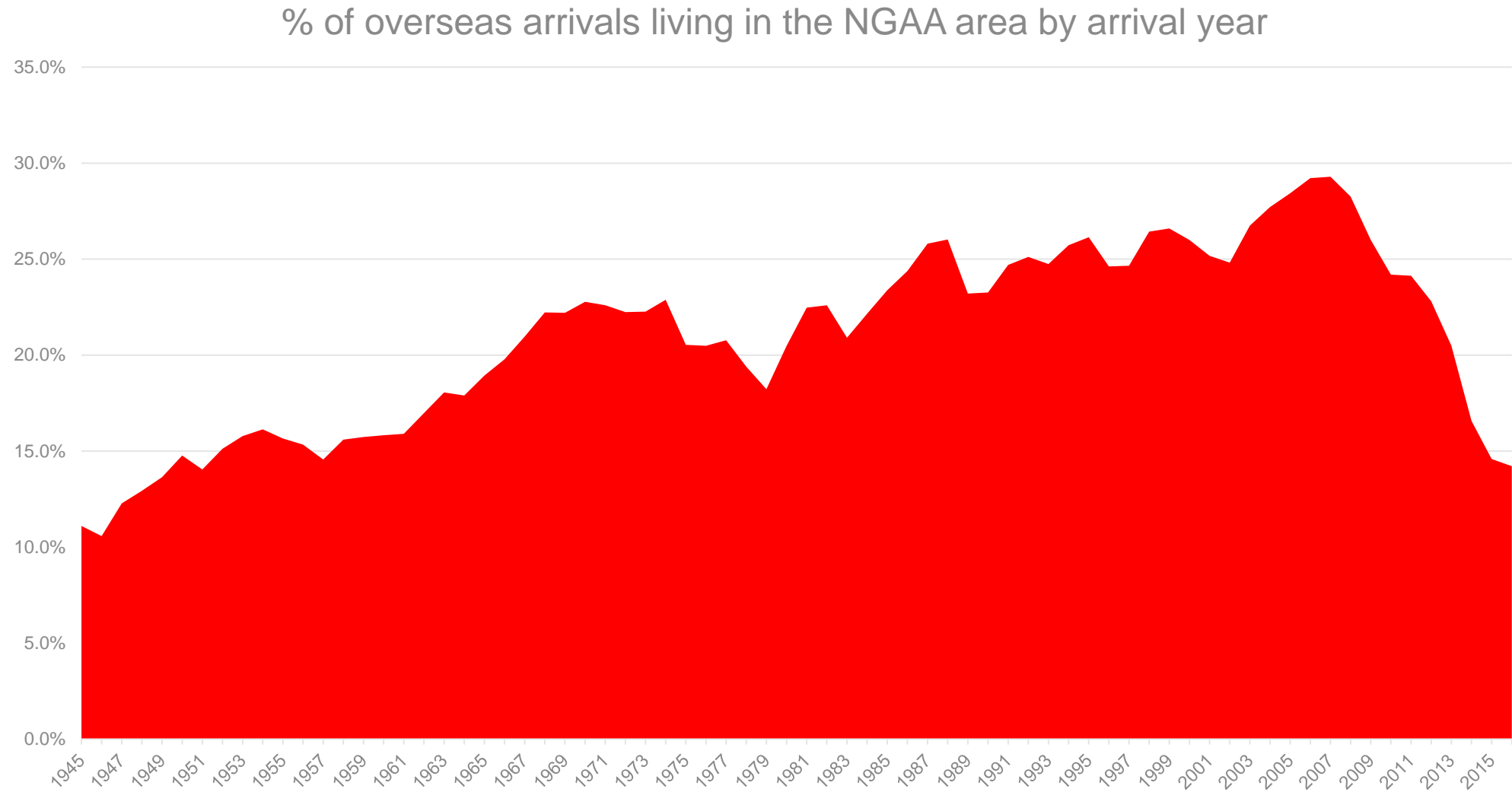
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While some of the inner suburbs of our capital cities **DECLINE** in cultural diversity, the outer suburbs continue to **INCREASE**.

Nowhere is this more apparent than growth areas of Perth – Eg. Swan, Gosnells, Armadale

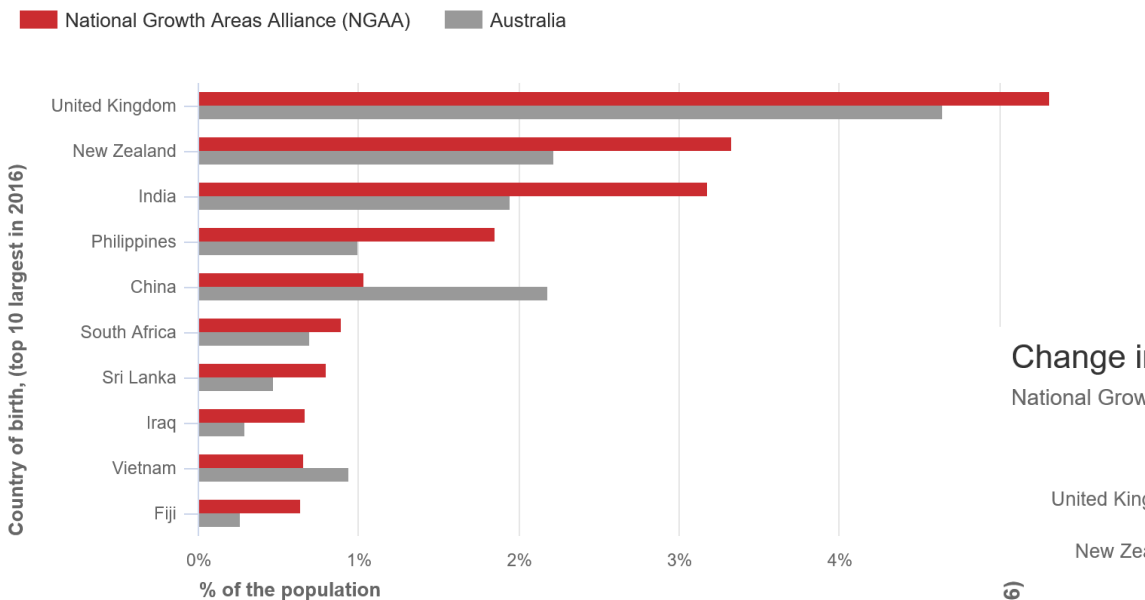
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Year of arrival



Birthplace groups in the NGAA

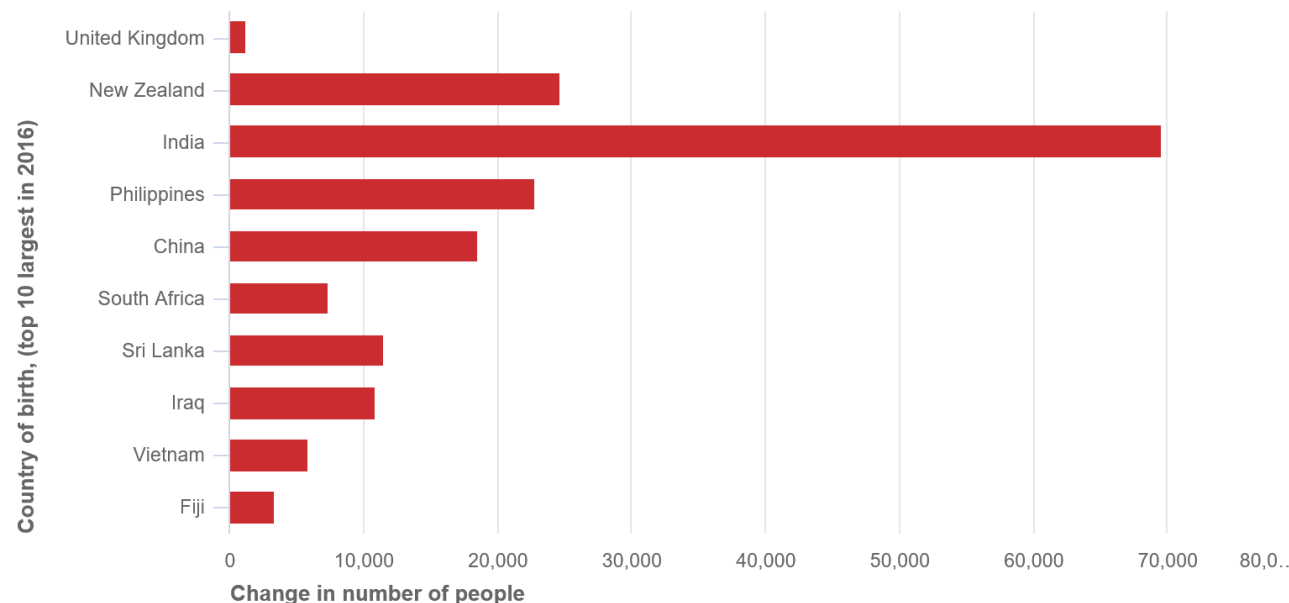
Birthplace, 2016



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Change in birthplace, 2011 to 2016

National Growth Areas Alliance (NGAA)



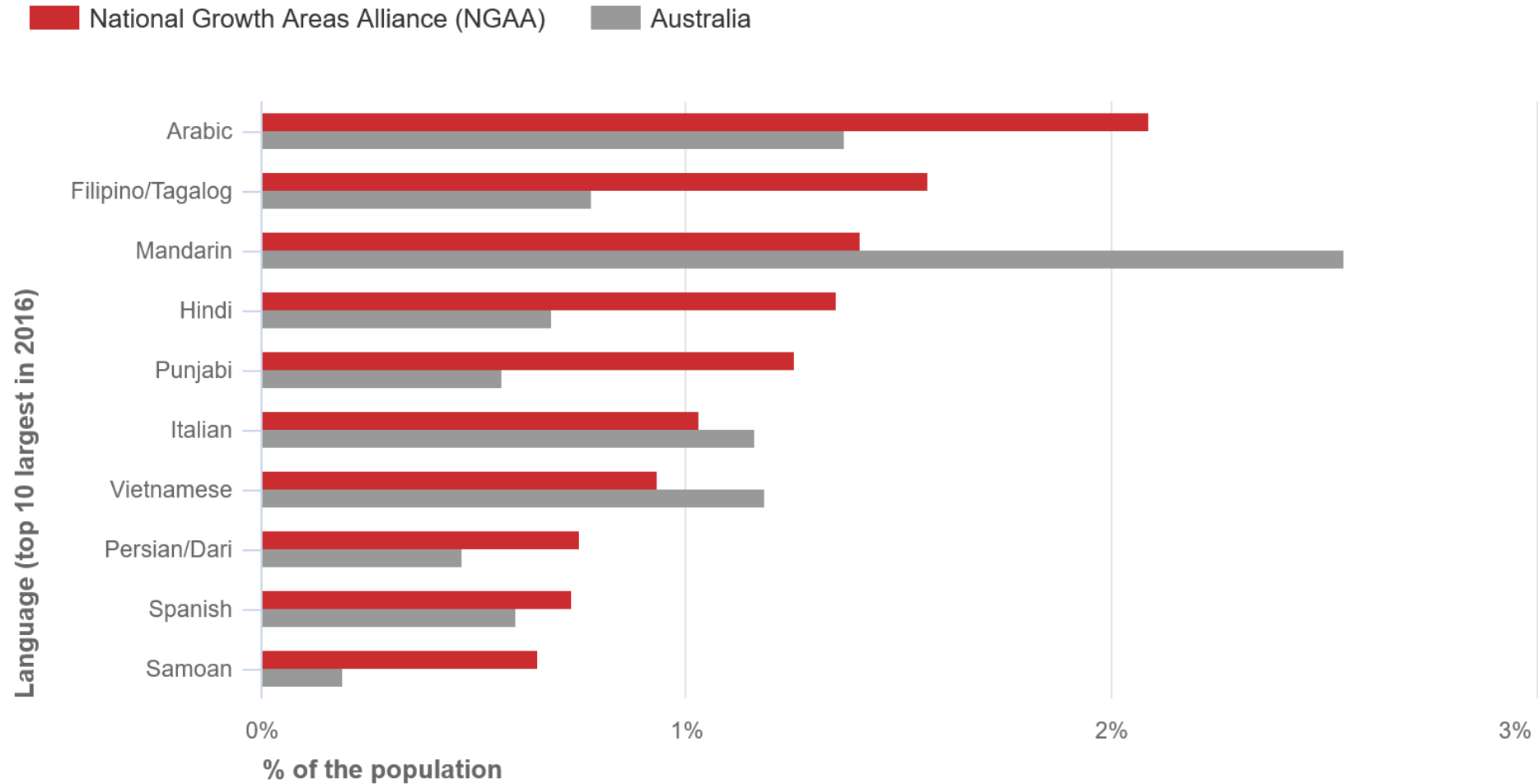
Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Birthplace groups with the greatest percentage of their Australian population living in the NGAA, 2016 Census

Country of Birth	NGAA Total	Australia total	% in NGAA
Samoa	15,056	24,016	62.7%
South Sudan	3,919	7,697	50.9%
Fiji	28,870	61,472	47.0%
Iraq	29,948	67,353	44.5%
Sudan	7,317	17,029	43.0%
El Salvador	4,087	9,573	42.7%
Cook Islands	2,894	6,830	42.4%
Afghanistan	18,543	46,799	39.6%
Mauritius	9,508	24,324	39.1%
Timor-Leste	3,416	9,242	37.0%
Ghana	1,924	5,283	36.4%
Philippines	83,527	232,391	35.9%
Turkey	11,518	32,183	35.8%
Laos	3,668	10,401	35.3%
Romania	5,064	14,387	35.2%
Tonga	3,368	9,967	33.8%
Sri Lanka	36,046	109,850	32.8%
Malta	12,303	37,609	32.7%
Pakistan	19,778	61,918	31.9%
Nigeria	2,698	8,487	31.8%
India	143,231	455,385	31.5%
Bosnia and Herzegovina	7,506	23,959	31.3%

Language groups prevalent in the NGAA

Language spoken at home, 2016



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Measure	Australia	The Fast Growing Outer Suburbs (NGAA)	% in NGAA
Economy (2017/18)	\$1,720 billion	\$207 billion	12.0%
Total jobs (2017/18)	12,580,227	1,703,589	13.5%
Employed Residents (2017/18)	12,580,227	2,425,353	19.2%

Source: National Economics, modelled series, 2017/18 update for economy.id

Job growth by LGA 2011 to 2018 (top 25)

12 of the top 25 top jobs growth
LGAs in the past 7 years are in the
NGAA region LGAs.



LGA	Change	
	No.	%
Sydney (C)	129,426	25.6%
Melbourne (C)	96,206	21.1%
Gold Coast (C)	52,562	21.6%
Brisbane (C)	51,560	6.4%
Moreton Bay (R)	28,533	24.7%
Blacktown (C)	28,392	25.8%
Sunshine Coast (R)	25,823	22.4%
Liverpool (C)	23,392	32.7%
Parramatta (C)	22,755	14.7%
Greater Dandenong (C)	21,729	21.1%
Australian Capital Territory	21,686	9.5%
Hume (C)	21,611	22.7%
Greater Geelong (C)	21,251	22.6%
Wyndham (C)	20,074	35.0%
The Hills Shire (A)	19,405	30.1%
Yarra (C)	19,254	22.5%
Casey (C)	18,650	28.9%
Monash (C)	18,313	15.6%
Whittlesea (C)	18,072	35.5%
Logan (C)	17,255	17.5%
Brimbank (C)	16,661	24.2%
Cockburn (C)	16,234	42.8%
Ryde (C)	16,073	18.3%
Penrith (C)	15,544	21.9%
Campbelltown (C) (NSW)	15,486	34.2%

Source: National Economics 2019

Workforce self-containment

While 70% of workers in the NGAA region live within an NGAA area...

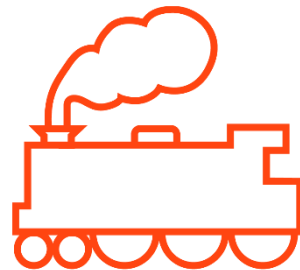
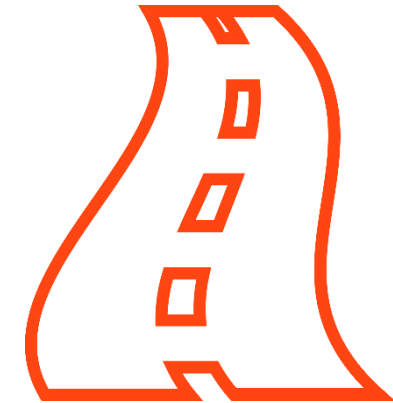
Only 46% of residents work within the NGAA area.

Well over half of NGAA residents have to leave their local area to work.

A key goal of economic development in the area needs to be providing jobs for locals.

Maintain the jobs to workers ratio in the case of increasing population growth.

To maintain the current ratio (not improve it), NGAA areas need about 42,000 new jobs every year, to account for population growth. This just keeps the percentage of total jobs steady relative to employed residents.



The future

.id currently have population forecasts for 25 of the 31 Local Government areas making up the NGAA. These are bottom up forecasts done at the suburb level, giving a strong grounding of the future population, based on agreed development assumptions with council.

For 4 LGAs in Queensland, we have sourced Queensland (medium series) Government projections, which give an indication of likely future growth.

For NT we have applied the NT Government territory projected growth rate for the whole state. These are not locally based and will be the least reliable, but make up a very small proportion of the total NGAA.

The future

By 2036, approximately 7,900,000 people are expected to live in the NGAA, making up 24.9% of Australia's population, up from 19.8% currently.

The NGAA's importance to Australia's population will continue to grow, driven by an average growth rate of 3.3% p.a., to Australia's 1.5% (ABS medium series).

Forecast population by NGAA LGA – NSW and Vic

NGAA area	2018	2036	Average annual change
Blacktown City	366,534	505,278	2.1%
Camden Council	94,159	233,299	8.2%
Campbelltown City	168,139	275,778	3.6%
Liverpool City	223,304	358,870	3.4%
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National Growth Areas Alliance (NGAA)	4,950,082	7,904,801	3.3%

Forecast population by NGAA LGA – Qld, SA, WA, NT

NGAA area	2018	2036	Average annual change
City of Ipswich	213,638	480,339	6.9%
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Redland City	156,863	185,631	1.0%
District Council of Mount Barker	35,545	56,710	3.3%
City of Playford	93,426	131,726	2.3%
City of Armadale	87,634	141,176	3.4%
City of Cockburn	112,165	161,479	2.4%
City of Gosnells	123,325	170,048	2.1%
City of Kwinana	43,511	85,158	5.3%
City of Mandurah	85,302	119,877	2.3%
City of Rockingham	133,389	192,805	2.5%
Shire of Serpentine-Jarrahdale	30,933	68,335	6.7%
City of Swan	143,374	239,934	3.7%
City of Wanneroo	203,679	369,430	4.5%
Shire of Litchfield	25,598	31,742	1.3%
City of Palmerston	37,862	46,948	1.3%
National Growth Areas Alliance (NGAA)	4,950,082	7,904,801	3.3%

Case study – Even in a very high growth area, it's not all about growth...

Future growth in Melton is large, with an expected population of 400,000 by 2041, and 485,000 by 2051 (up from 2018's 156,000).

This is typical of the highest growth areas of the NGAA.

The largest increases are in areas not yet developed, such as Rockbank, Thornhill Park, Cobblebank-Strathtuloh, Fraser Rise, Deanside and Truganina-Strathtuloh.

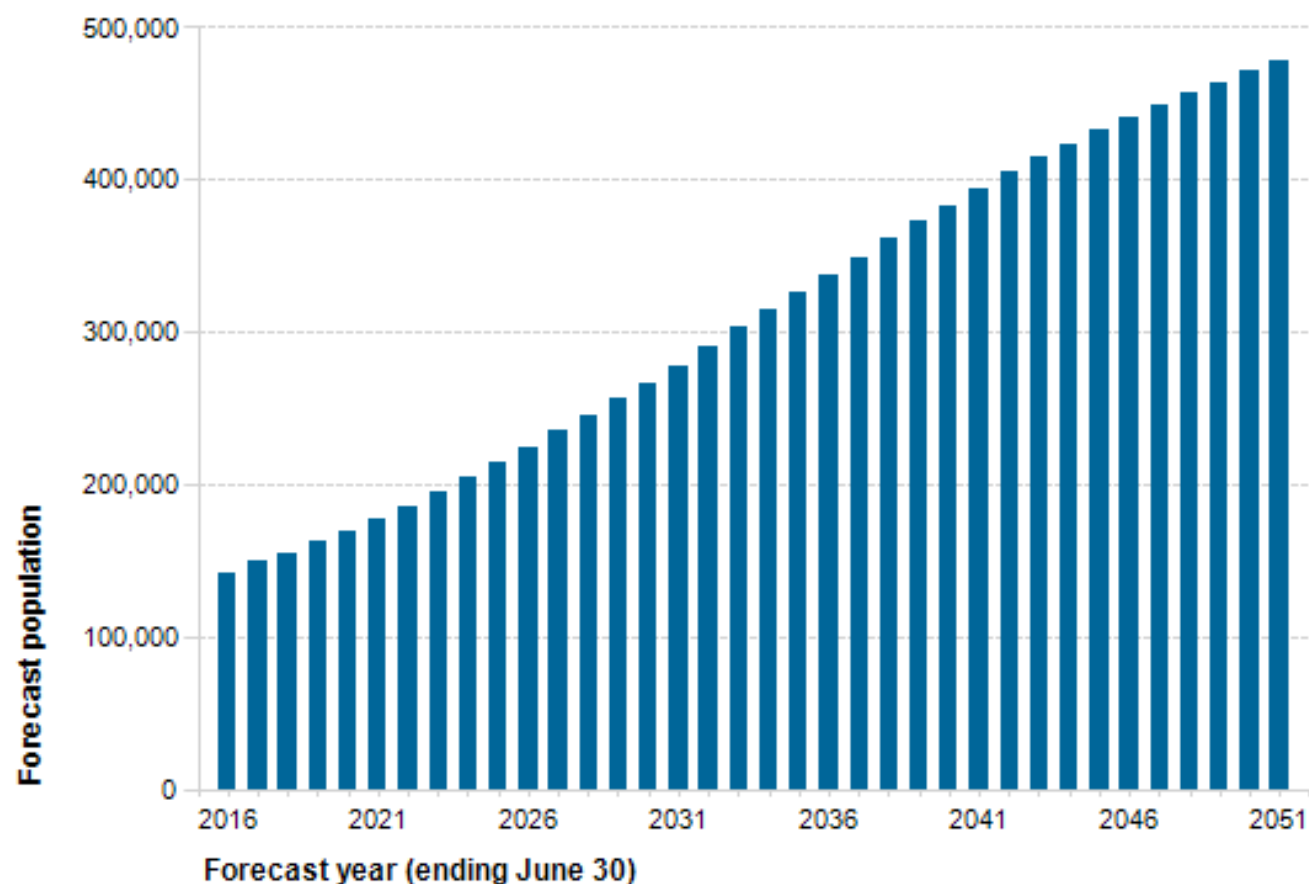
Despite this staggering growth, there are two suburbs showing population declines to 2051 (Caroline Springs, Taylors Hill).

Many areas are like this. As the growth front moves on, what happens to the suburbs which are now developed?

[Melton Population growth forecast summary](#)

Forecast population

City of Melton

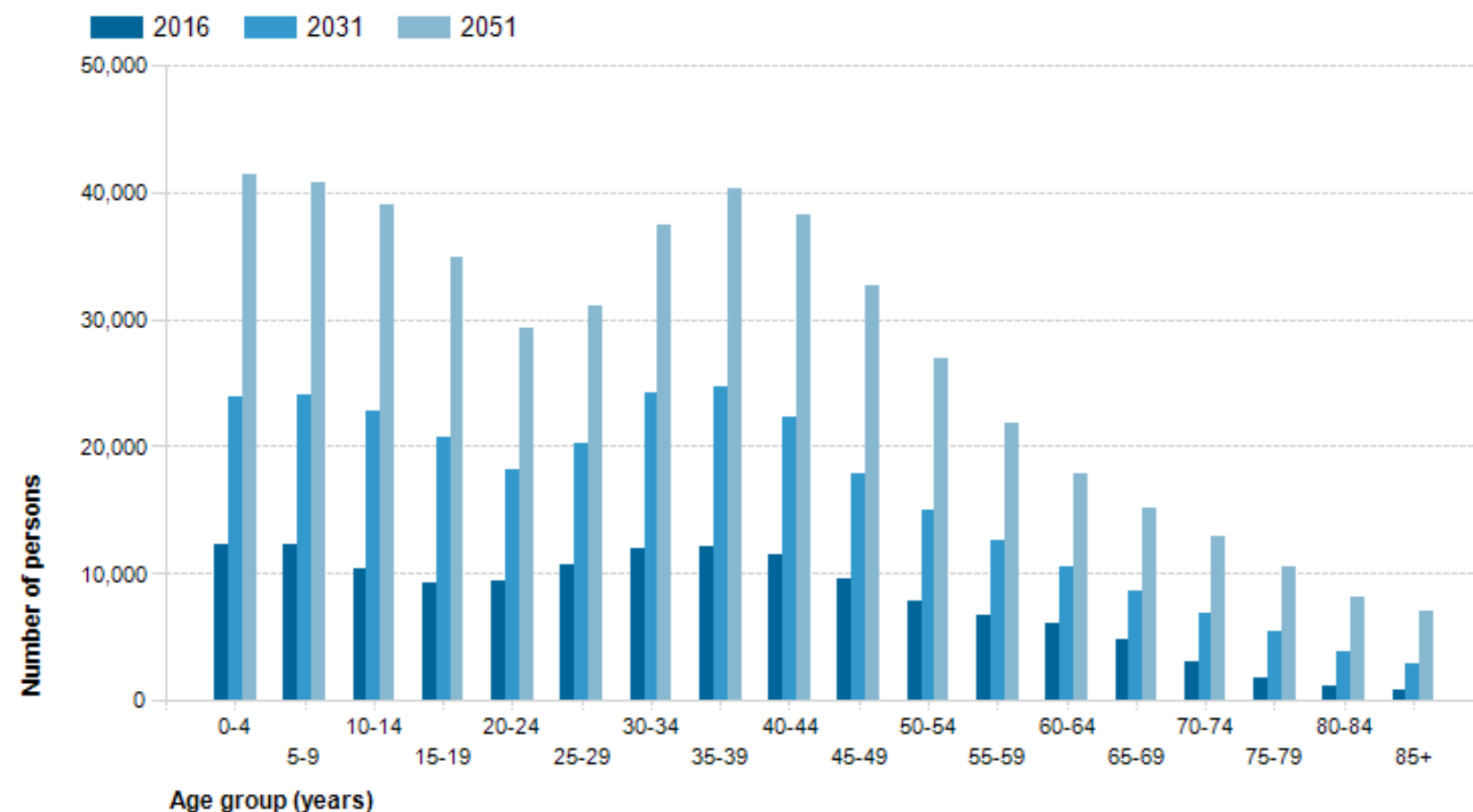


Population and household forecasts, 2016 to 2051, prepared by .id, July 2018.

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Forecast age structure - 5 year age groups

City of Melton - Total persons



Population and household forecasts, 2016 to 2051, prepared by .id the population experts, May 2019.

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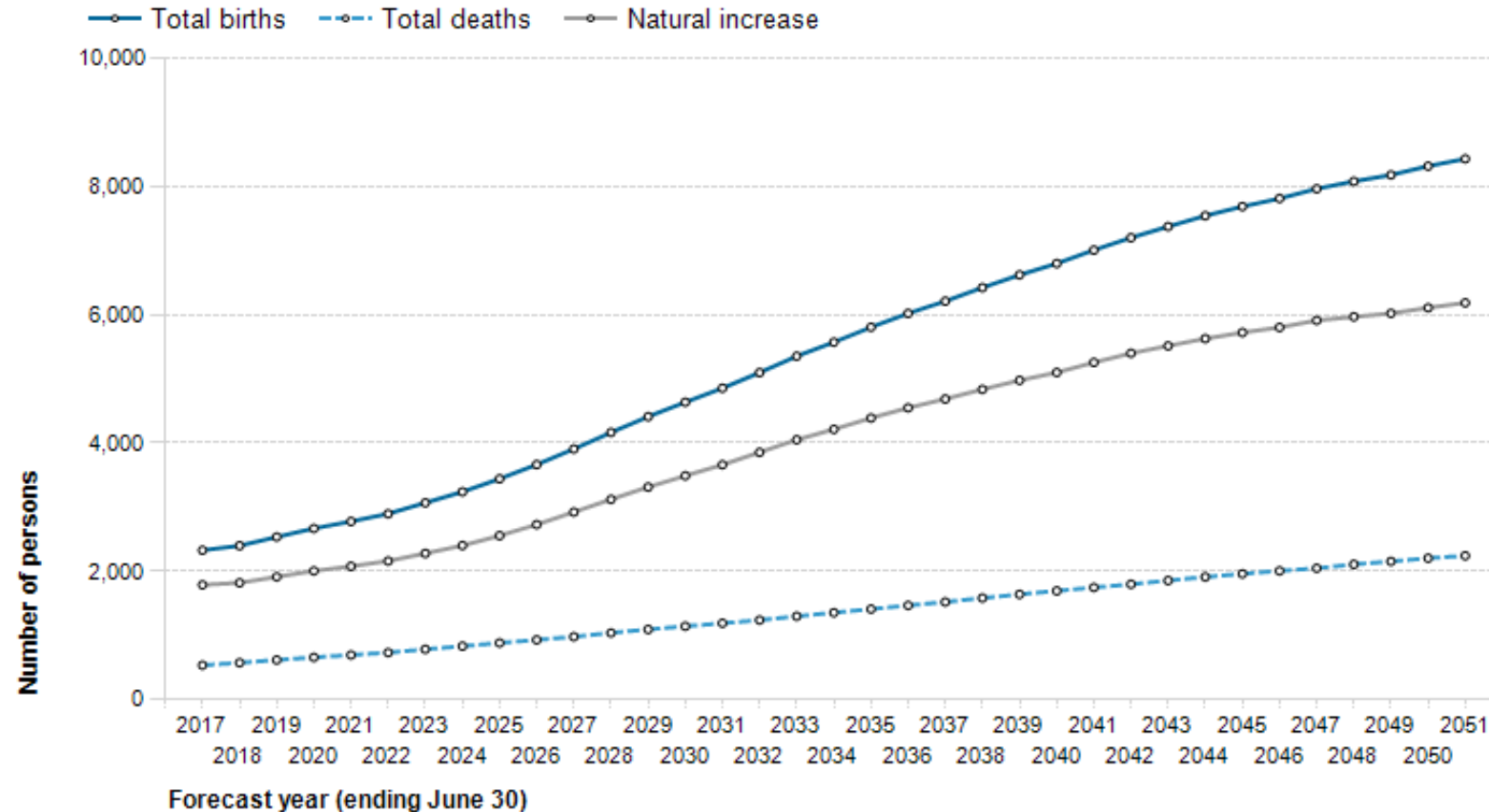
Currently, about $\frac{3}{4}$ of Melton's growth comes from net migration and only $\frac{1}{4}$ from natural increase

By 2051, this will be reversed, and about $\frac{3}{4}$ will come from natural increase, as Melton becomes an internal household generator.

This becomes more and more common throughout the NGAA

Forecast births, deaths and natural increase/decrease

City of Melton

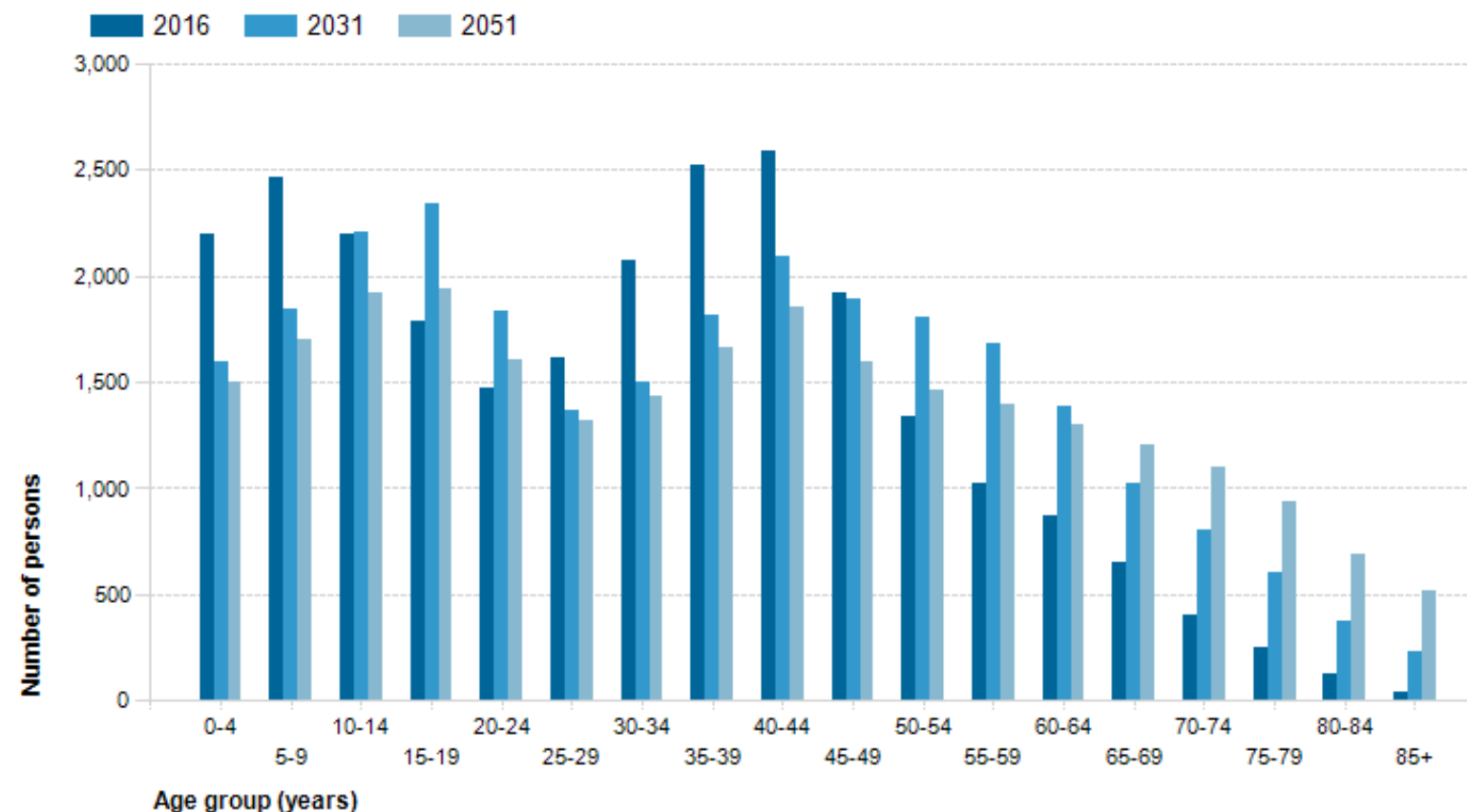


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Caroline Springs – Ageing of families, more elderly population

Forecast age structure - 5 year age groups

Caroline Springs - Total persons

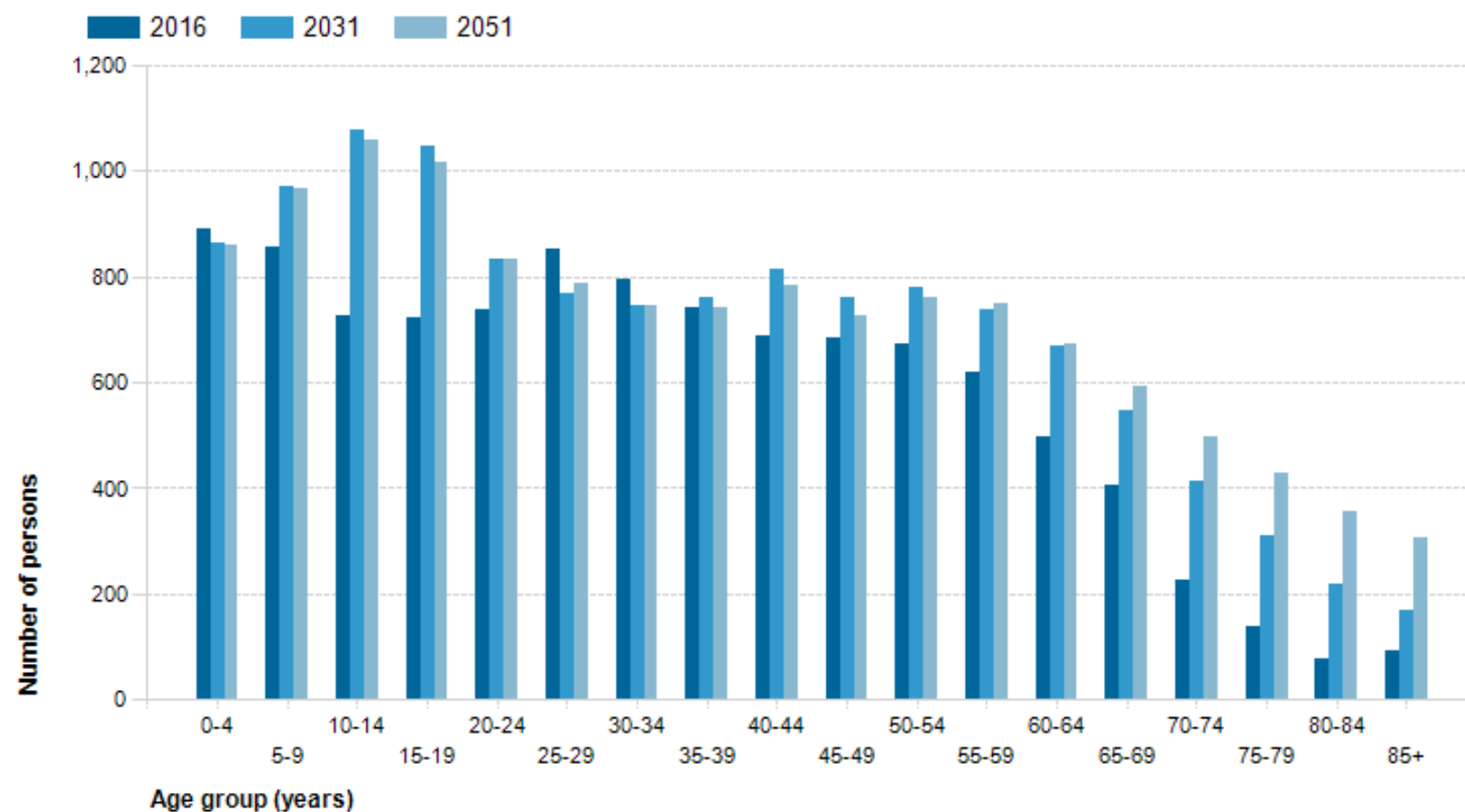


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Kurunjang – Parents with children, ageing

Forecast age structure - 5 year age groups

Kurunjang - Total persons

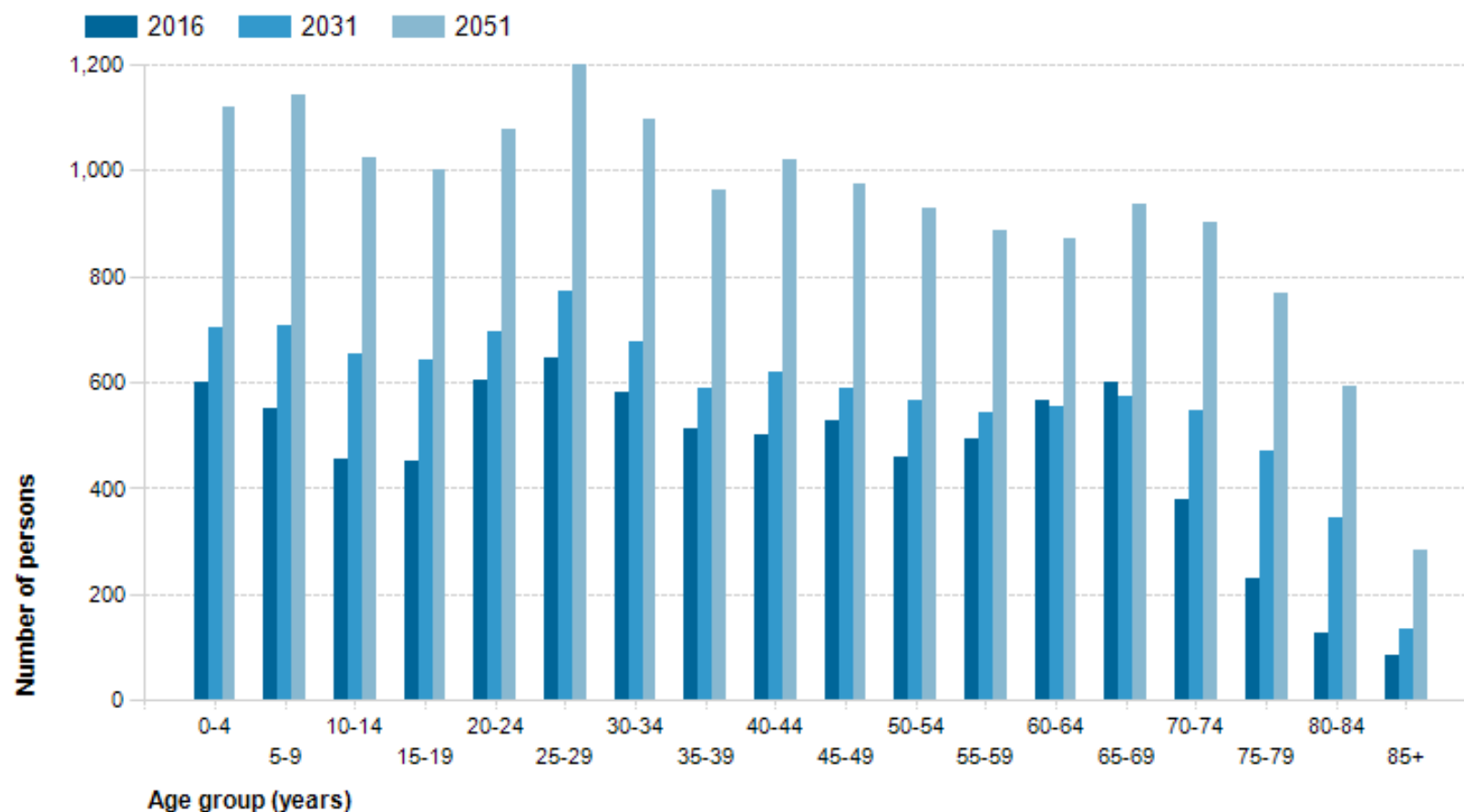


Population and household forecasts, 2016 to 2051, prepared by .id the population experts, May 2019.

Central Melton – regeneration projects and inner urban developments attracting all ages back in

Forecast age structure - 5 year age groups

Melton - Total persons

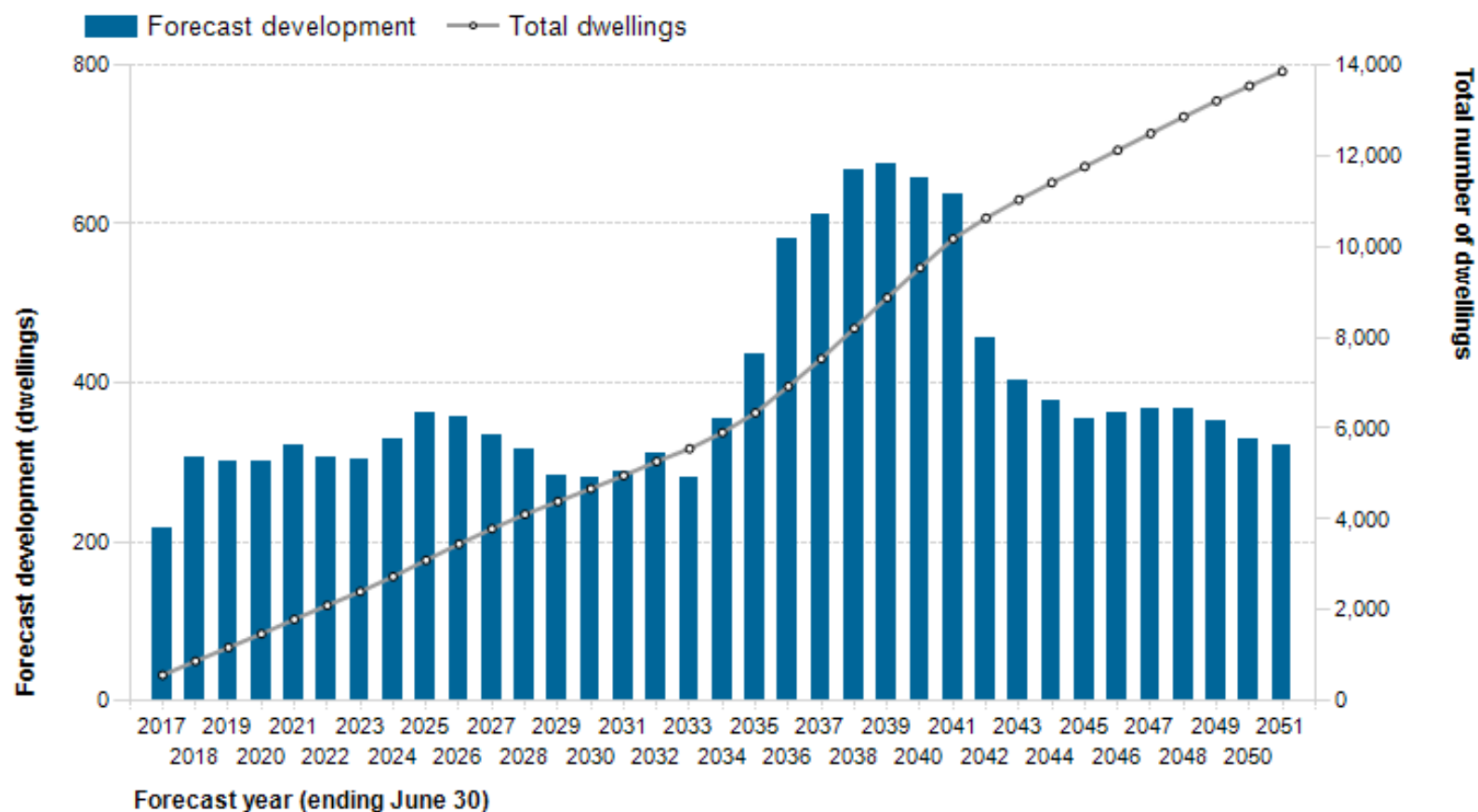


Population and household forecasts, 2016 to 2051, prepared by .id the population experts, May 2019.

Cobblebank – Strathtulloh – Growth to 42,000 – young families

Forecast residential development

Cobblebank - Strathtulloh

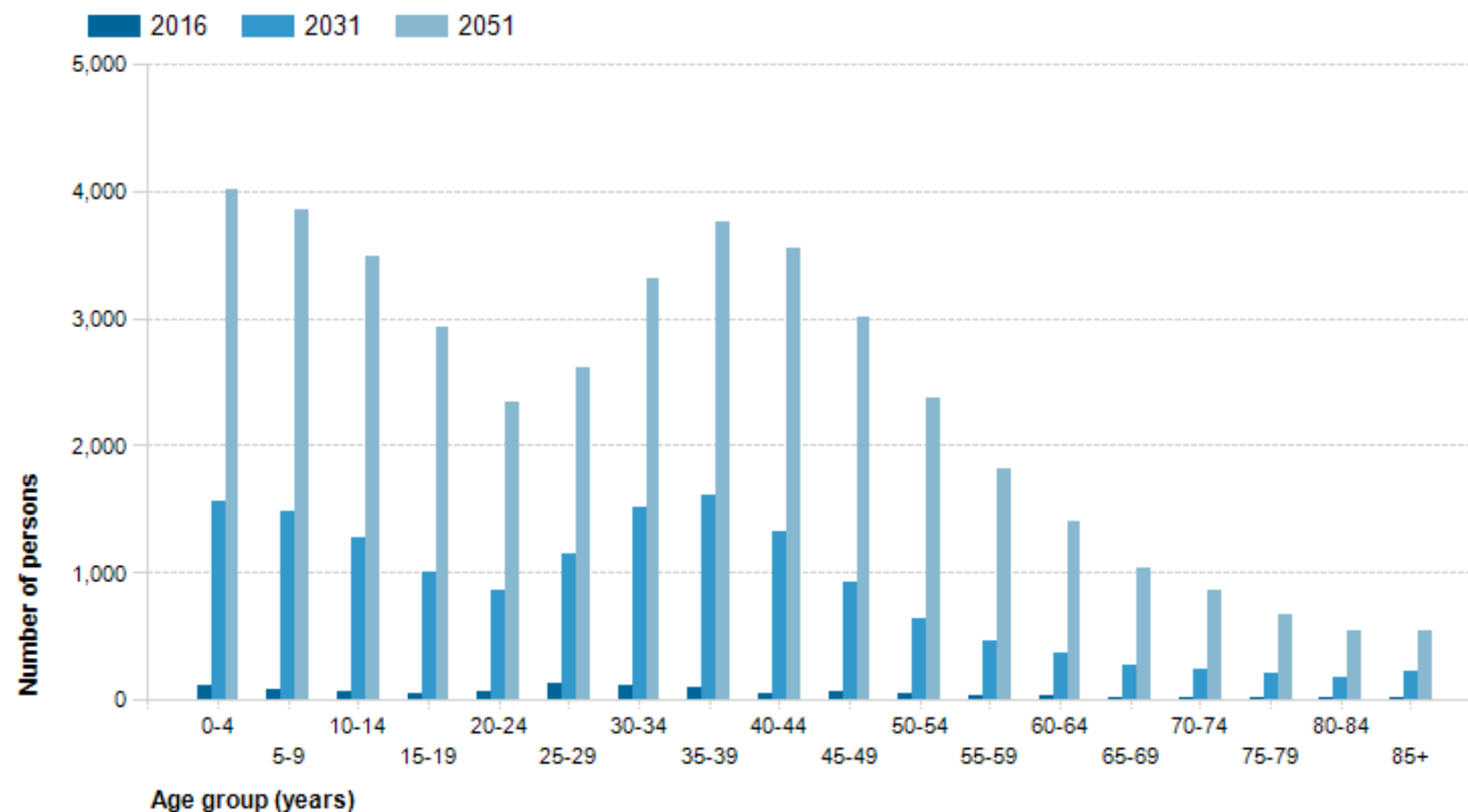


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Cobblebank – Strathtulloch – Growth to 42,000 – young families

Forecast age structure - 5 year age groups

Cobblebank - Strathtulloch - Total persons



Population and household forecasts, 2016 to 2051, prepared by .id the population experts, May 2019.

Summary

- ▶ NGAA is 31 councils making up around 20% of Australia's population, but 45% of population growth, on the fringes of our major cities.
- ▶ The Alliance has become the epicenter for multicultural growth in Australia, as new migrants, and upgraders from other areas increasingly move to the area.
- ▶ NGAA is younger than other parts of Australia, but not immune from the ageing process.
- ▶ By 2036, NGAA's share of Australia's population is likely to hit 25%.
- ▶ It is about growth, but not ALL about growth – many established suburbs have declining populations and substantial ageing. Providing services for areas where a growth front which has passed is a key challenge.
- ▶ Generating jobs for locals to ensure meaningful employment in the fast growing outer suburbs is also a key challenge for economic development.

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NGAA members and .id's Community Suite

	profile.id	atlas.id	forecast.id	economy.id	housing.id
VIC					
City of Casey	✓	✓	✓	✓	
Cardinia Shire Council	✓	✓	✓	✓	
Wyndham City Council	✓	✓	✓	✓	
City of Melton	✓	✓	✓		
Hume City Council	✓	✓	✓		
City of Whittlesea	✓	✓	✓	✓	✓
Mitchell Shire Council	✓	✓	✓		
WA					
City of Wanneroo	✓	✓	✓	✓	
City of Swan	✓	✓	✓	✓	
City of Cockburn	✓	✓	✓	✓	
City of Kwinana	✓	✓	✓	✓	
City of Armadale	✓	✓	✓	✓	
City of Gosnells	✓	✓	✓	✓	
Shire of Serpentine Jarrahdale	✓	✓	✓	✓	

NGAA members and .id's Community Suite

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NSW

Blacktown City Council



Camden Council



Liverpool City Council



Penrith City Council



Wollondilly Shire Council



SA

District Council of Mount Barker



City of Playford



Summary

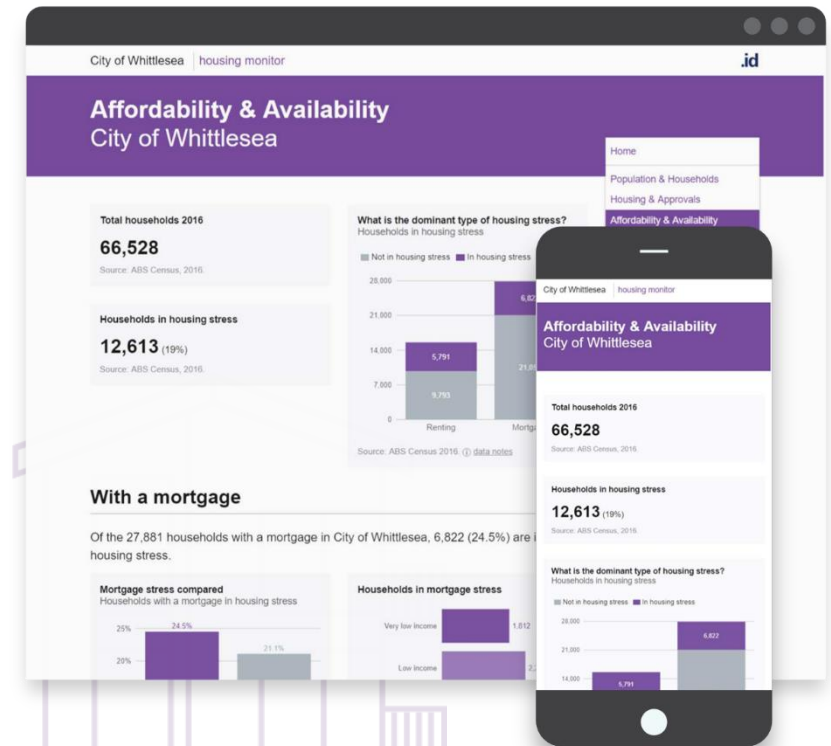
- ▶ The NGAA region Community profile site is online and available to all users to look at the overall characteristics of the alliance, and individual LGA level characteristics.
- ▶ Most members also have at least their own community profile with suburb level information for 1991 to 2016 Census.
- ▶ .id is available to help and provide training and ongoing support for all staff and users of the data.
- ▶ <http://profile.id.com.au/ngaa>
- ▶ Available to add –
 - Communities of Interest module, looking at the characteristics of small population groups like young people, elderly, people with a disability, people born in a specific country etc.
 - Economy.id – detailed economic and workforce information and economic modelling
 - Housing.id – information on housing supply and consumption, and changing housing affordability.

economy.id

housing.id

A clear story of housing supply, demand and affordability in your LGA to help you advocate for and monitor your community's housing needs

- Developed using .id's 20 years of housing consulting experience.
- Combines demographic, economic, housing and population forecast data in one place
- **Monitor.** Regular data updates enable responsive policy making.
- **Demand.** Understand what housing your community needs
- **Supply.** Understand how housing supply is changing
- **Affordability.** Quantify housing affordability in your area
- **Availability.** Quantify availability of housing for very low, low and moderate income households



Who lives in what type of housing, 2016

Percent of households in dwelling types by household type

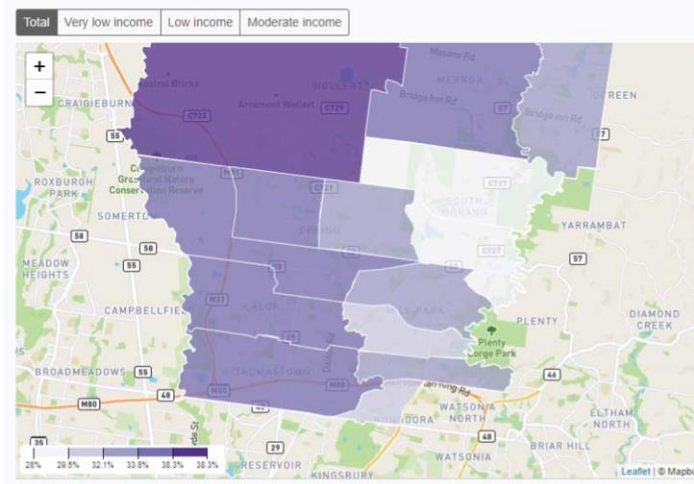
Source: ABS Census, 2016. [data notes](#)

What kinds of housing do people live in?

Inform housing diversity strategy by understanding what your households are consuming.

Where is rental stress felt?

Total households in rental stress by SA2



Where is housing stress felt?

Use small area information to understand where the local effects of the housing market are affecting households in different income brackets.

Is there enough affordable housing available?

Number of affordable rental listings in 2018

Source: ABS Census 2016 and Hometrack. [data notes](#)

Is the market supplying affordable housing?

Get the exact number of listings on the market in the last 12 months that would be affordable. Updated on a 6-month basis so that you can monitor how your housing market is affecting affordability.

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