

State of Australia's Growth Areas

**“Demographic and Socio-economic Characteristics of
Growth Areas” report**

Prepared for the National Growth Areas Alliance



November 2022

prepared by **.id**

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1. Executive Summary and key findings

NGAA LGAs are growing at a much faster rate than Australia. Residents in NGAA LGAs are younger, and are more likely to live in family households, than all of Australia. Compared to Australia, households in NGAA LGAs are larger and more likely to be stand-alone dwellings than medium density or high-density dwellings.

NGAA LGAs are very culturally diverse, but the make-up of the population is different than that of Australia overall. There are more residents born overseas in NGAA LGAs than Australia as a whole. Their birthplace characteristics are different with more residents born in countries like India, New Zealand or the Philippines and fewer born in China. Languages spoken statistics reflect this different cultural make-up.

A lower proportion of NGAA LGA residents than Australia need assistance due to disability or long-term health conditions, which is partly related to the younger age structure of NGAA LGAs. However, in NGAA LGAs, older residents have higher rates of disability, with the incidence of long-term health conditions such as diabetes and asthma higher.

NGAA LGA household income statistics show most households are in the middle-income ranges, compared to Australia, but relative household incomes have decreased over time. Labour force participation is higher in NGAA LGAs than Australia. However, employment is slightly lower, with declines in full-time employment and increases in part-time employment over time.

Industries of employment show different trends in NGAA LGAs than in all of Australia. For example, more residents work in healthcare, construction and retail trade industries and fewer work in education and training, professional, scientific and technical services or hospitality related industries.

Due to the location and industry composition of NGAA LGAs, method of travel to work trends are different to Australia with larger proportions of employed residents driving to work and slightly lower proportions working from home, although working from home has increased drastically since 2016, as expected, due to Covid-19. Unpaid childcare is more common in NGAA LGAs than Australia, but volunteering is less common.

Housing tenure statistics in NGAA LGAs reflect age of settlement, role and function of growth areas. This results in higher proportions of households owned with a mortgage compared to Australia and lower proportions of privately rented or fully owned households.

Mortgage and rental costs differ across NGAA LGAs in Australia, but overall mortgage costs are higher than Australia and rental costs, slightly lower. Housing stress is higher for both mortgaged and rented households in NGAA LGAs than Australia. Given that the Census 2021 information regarding housing stress is already somewhat outdated due to increased interest rates, it can be assumed that mortgage stress statistics are higher in 2022.

2. Introduction

This report presents the demographic and socio-economic characteristics of local government areas (LGAs) that are part of the National Growth Areas Alliance (NGAA), a collaboration of 29 Councils across Australia whose areas are experiencing rapid growth. Member Councils of the NGAA are located at the urban-rural interface of metropolitan areas, have significant greenfield future development areas, and are experiencing rapid population and/or urban development growth.

The 29 LGAs which make up the growth areas are:

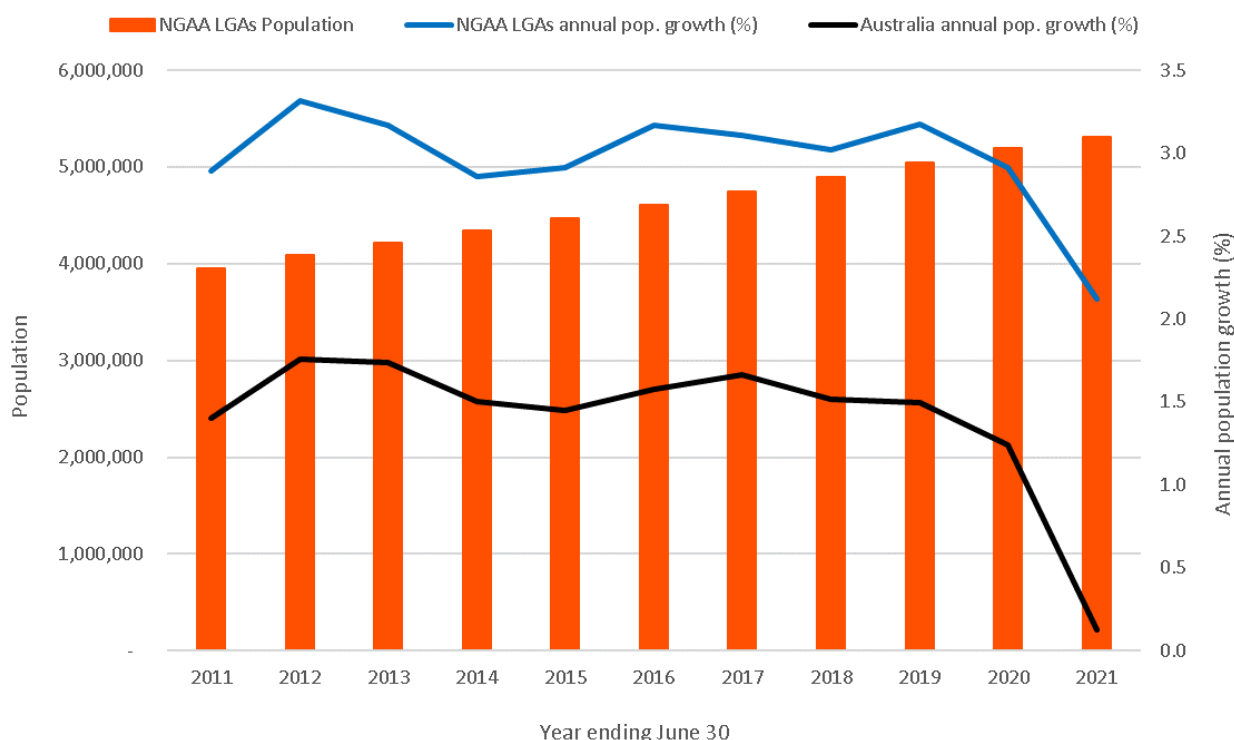
- | | |
|----------------------------|--|
| ▾ Blacktown City, NSW | ▾ Logan City, QLD |
| ▾ Camden Council, NSW | ▾ Moreton Bay Region, QLD |
| ▾ Campbelltown City, NSW | ▾ Redland City, QLD |
| ▾ Liverpool City, NSW | ▾ District Council of Mount Barker, SA |
| ▾ Penrith City, NSW | ▾ City of Playford, SA |
| ▾ The Hills Shire, NSW | ▾ City of Armadale, WA |
| ▾ Wollondilly Shire, NSW | ▾ City of Cockburn, WA |
| ▾ Shire of Cardinia, Vic. | ▾ City of Gosnells, WA |
| ▾ City of Casey, Vic. | ▾ City of Kwinana, WA |
| ▾ City of Hume, Vic. | ▾ City of Mandurah, WA |
| ▾ City of Melton, Vic. | ▾ City of Rockingham, WA |
| ▾ Shire of Mitchell, Vic. | ▾ Shire of Serpentine-Jarrahdale, WA |
| ▾ City of Whittlesea, Vic. | ▾ City of Swan, WA |
| ▾ City of Wyndham, Vic. | ▾ City of Wanneroo, WA |
| ▾ City of Ipswich, Vic. | |

All demographic and socio-economic characteristics are benchmarked to Australia as a whole to demonstrate the similarities and differences between NGAA LGAs to Australia as a whole. Finally, trend analysis looks at the change between 2016 and 2021.

3. Population growth

Over 5.3 million Australians live in growth area LGAs across Australia. This total represents 20.6% of Australia’s population. Since 2016, the share of Australia’s population living in growth areas (NGAA LGAs) has increased by 1.6%. Population growth in NGAA LGAs is considerably higher than the Australian average growth rate. Between 2011 and 2021, the population of NGAA LGAs increased by 1,348,000, a 34% increase. In the same period, Australia’s total population grew by 14.9%.

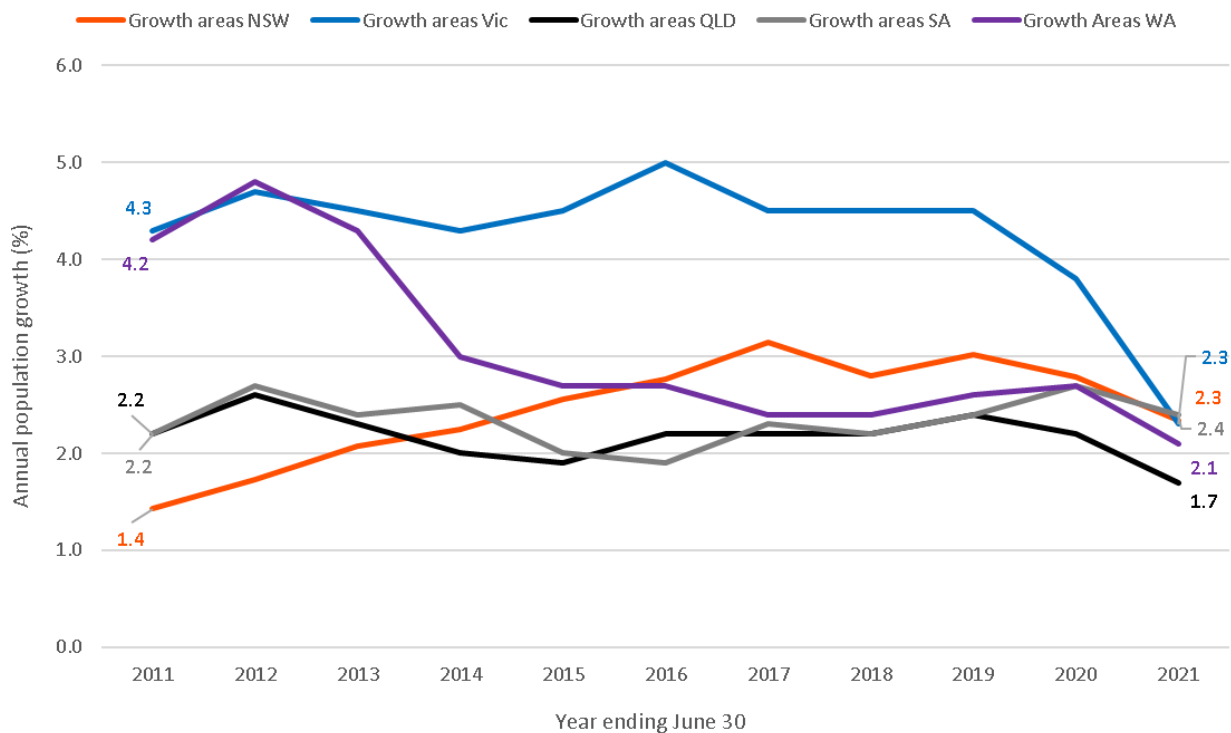
On an annual basis, the population of NGAA LGAs on average increased by 3.0% each year since 2011. Australia’s population, by comparison, increased by an average 1.4% per year in the same period.



Estimated resident population, NGAA LGAs and Australia, 2011-2021 (source: ABS)

Within Australia, NGAA LGAs in Victoria had the highest annual percentage growth in population in the 2011-2021 period, an average growth of 4.3% per year. This was followed by Western Australia, where NGAA LGAs grew by an average 3.1% per year. New South Wales NGAA LGAs grew by 2.4% per year between 2011 and 2021, South Australian NGAA LGAs by 2.3% and Queensland NGAA LGAs by 2.2% per year.

Since 2019, as the Covid-19 pandemic and associated restrictions to overseas migration and internal movement within Australia disrupted population growth, population growth rates decreased for NGAA LGAs in all States and became similar. For example, in 2011 the difference between the slowest and fastest-growing areas by State was 2.9%. In 2021, the difference between the slowest and fastest-growing areas by State was only 0.6%. In 2021, South Australia recorded the most significant annual percentage growth rate (2.4%), followed by New South Wales (2.34%), Victoria (2.30%), Western Australia (2.41%) and Queensland (1.7%).



Annual population growth rates for NGAA LGAs by State, 2011-2021 (source: ABS)

4. Age structure

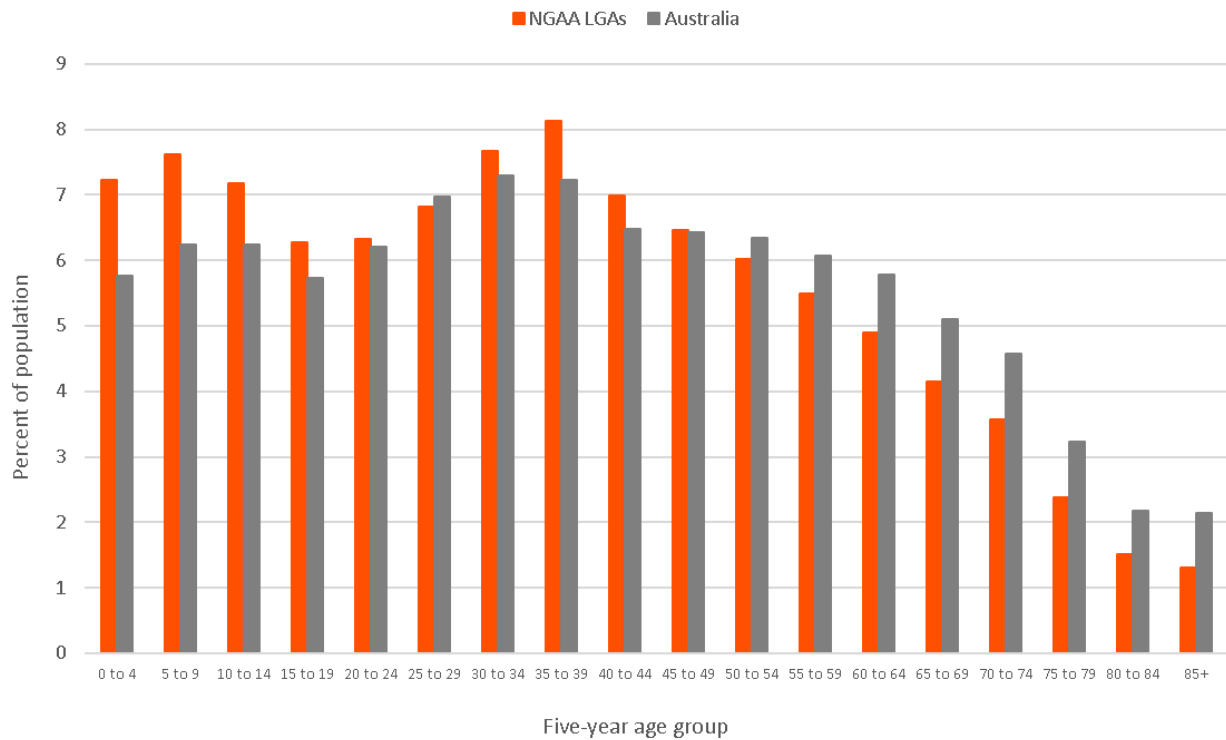
The median age of NGAA LGAs in 2021 was 35 years, 3 years younger than Australia's median age of 38 years. However, since 2016, the median age of NGAA LGAs has increased by 1 year, suggesting some ageing in place of residents.

NGAA LGAs have a notably higher proportion of younger adults and children than Australia and a notably lower proportion of residents aged 55 years or over.

In terms of broad age groups:

- ▣ 22% of the population in NGAA LGAs was younger than 15 years, compared to 18% of Australia.
- ▣ 65% of the population in NGAA LGAs was aged 15-64 years, compared to 64.5% in Australia, however, the Australian population is more represented in the older age groups within this cohort.
- ▣ Within this broad 15-64 year age cohort, 42% of the population in NGAA LGAs was aged 15-44 years, compared to 40% of Australia. Conversely, 23% of the population in NGAA LGAs were 45-64 years old, compared to 25% of Australia.
- ▣ The proportion of the population in NGAA LGAs aged over 65 was 12.9%, compared to 17.2% of Australia. In addition, only 2.8% of the population in NGAA LGAs is aged 80 years or older, compared to 4.3% in Australia.

The different age structures (and household composition) of NGAA LGAs means that the relatively younger population in these LGAs requires additional services and infrastructure from local government, State government or other agencies.



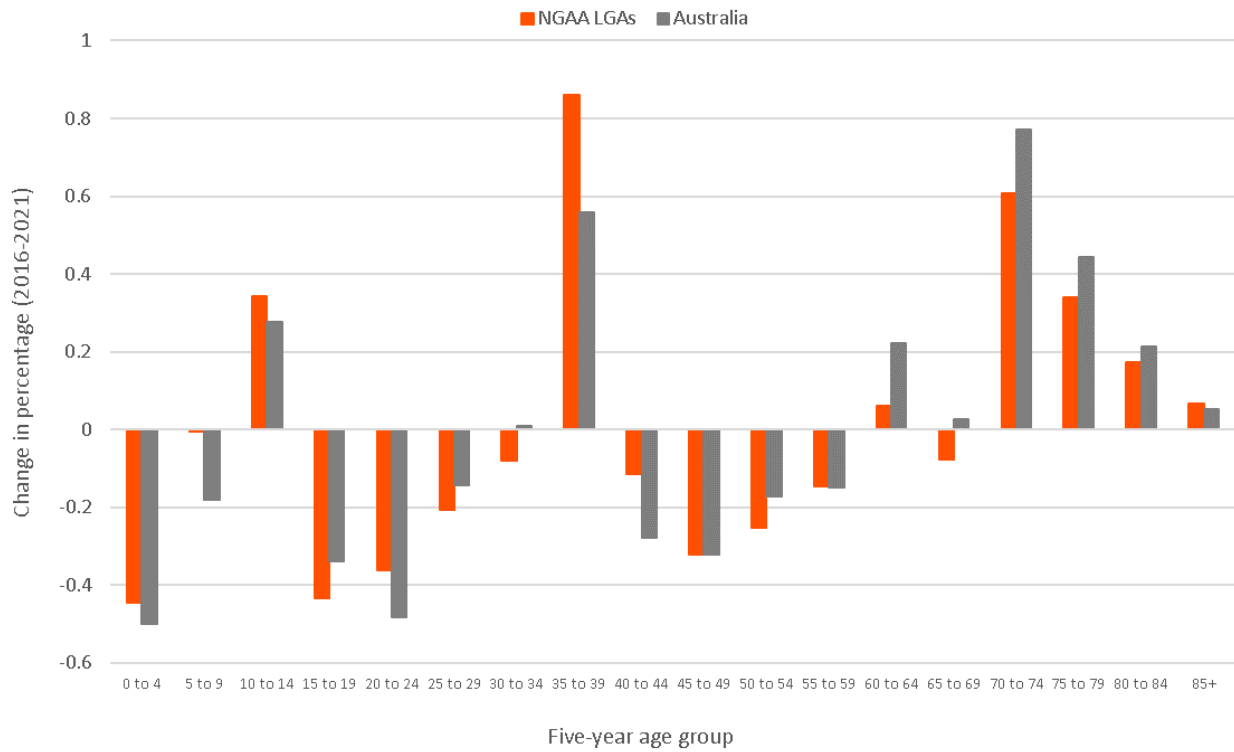
Age structure of NGAA LGAs and Australia, 2021 (source: ABS)

Since 2016, the age structure of NGAA LGAs has changed. There has been a decrease in 0-4 year olds and a slight decrease in the proportion of 5-9-year-olds. Similar trends were recorded in Australia too.

In 2021, there was a lower proportion of 15-29-year-olds in both NGAA LGAs and Australia, compared to 2016. On the other hand, the proportion of 35-39-year-olds and 10-14-year-olds increased, suggesting more younger families and older couples without children (35-29 years).

The proportion of 40-59-year-olds decreased in NGAA LGAs and Australia. In contrast, the proportion of NGAA LGA residents aged 70 years or older increased by 1.2%, slightly less than the proportion increase for this age group in Australia (1.5%).

Proportion changes do not mean that there are fewer people aged 15-34 years in NGAA LGAs in 2021, compared to 2016 (they increased by 161,000), but instead shows that the proportional make up of the population is changing due to somewhat altered migration patterns (partly impacted by Covid-19 in 2020 and 2021) and ageing in place of residents who simply move through age groups as they get older.



Change in the age structure of NGAA LGAs, 2016-2021 (source: ABS)

Within Australia, the median ages of NGAA LGAs by State are:

- ▣ Growth areas NSW – 35 years (+1 year since 2016)
- ▣ Growth areas QLD – 37 years (+1 year since 2016)
- ▣ Growth areas SA – 35 years (+1 year since 2016)
- ▣ Growth areas Vic. – 34 years (+1 year since 2016)
- ▣ Growth areas WA – 36 years (+2 years since 2016).

Victorian NGAA LGAs had the lowest median age, whereas Queensland NGAA LGAs, the highest. This reflects the age of the growth areas, when they were established, how long the population has been ageing in place and the kind of housing market that has been attracted to the growth areas.

5. Migration characteristics

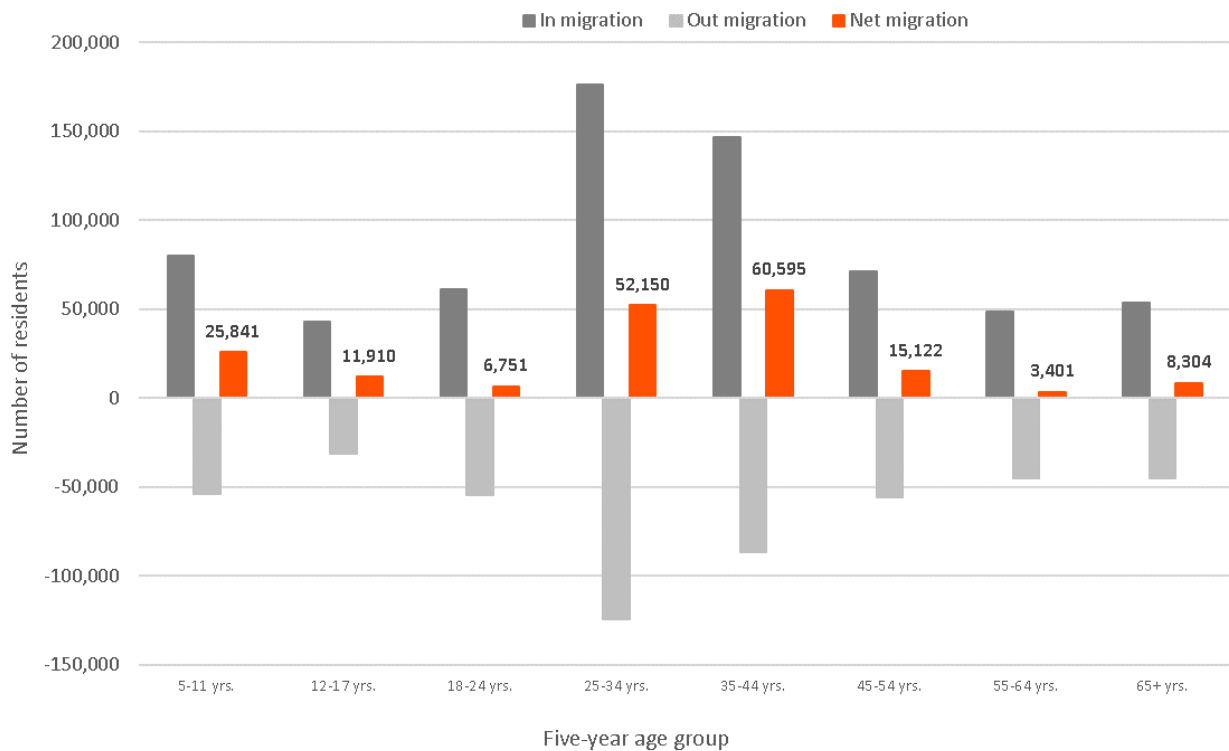
Population growth occurs via different drivers of change – natural increase and net migration. Natural increase refers to the population growth from births minus deaths. Migration is a population driver of change which makes up a large proportion of population growth in NGAA LGAs. Because the LGAs have high levels of housing supply, they are designed to attract new residents, both overseas and within Australia.

For example, the drivers of population change in a few select NGAA LGAs are quite different to that of Australia as a whole. Migration can make up between 40% and 70% of an NGAA LGA's population growth (based on analysis of select LGA components of population change 2019-2020).

Migration by age statistics reveal who is migrating to and from an area. In the case of NGAA LGAs, the migration by age statistics are a combination of in-migration and out-migration for all 29 NGAA LGAs.

The largest net migration gain between 2016 and 2021 was in the 35-44 years and 25-34 age groups, representing young couples with and without children. Children aged 5-11 also recorded high net migration gain levels. No age group recorded a net migration loss, but older age groups (55-64 years) and 65+ years) had low levels of net migration gain, driven by low in-migration and similar levels of out-migration. Older people do not move as much as younger people and migration tends to be caused by housing need (such as in-migration, driven by need to downsize or out-migration driven by age or necessity for aged care).

Younger residents aged 18-24 also recorded relatively low net migration gain to NGAA LGAs. This age group is fairly mobile and in the out-migration category can represent young people leaving home for education and employment opportunities elsewhere. In the in-migration category, they represent children living at home with parents or young adults who migrate to these LGAs for housing opportunities.

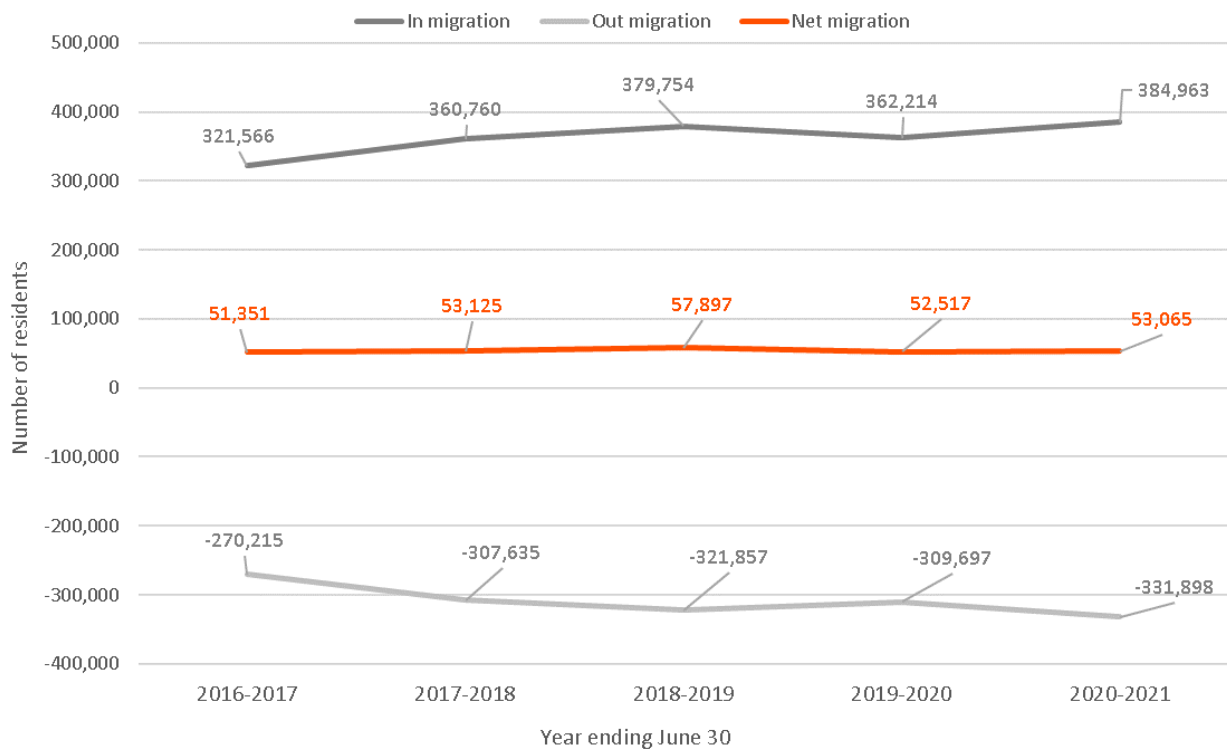


Migration by age for NGAA LGAs, 2016-2021 (source: ABS)

Annual migration figures, sources from the ABS "Regional Internal Migration Estimates" (RIME) collection, are part of the annual Estimated Resident Population update and show movement between all LGAs in Australia. This information shows in, out and net migration statistics for all NGAA LGAs for each year between 2016 and 2021 and is a valuable way of understanding recent migration patterns and any potential influence of Covid-19 on internal migration.

Annual net migration has remained relatively the same since 2016 and was driven by two factors – an increase of in-migration, and an almost proportional increase of out-migration, even in 2020-2021, which is a period affected by Covid-19, but only covering the period from 1. July 2019 to 30 June 2020, only including four months of a Covid-19 affected period).

- ▣ Since 2016, the average annual in-migration to NGAA LGAs has been almost 362,000 residents.
- ▣ The average annual out-migration has been 308,300 residents and
- ▣ The average annual net migration has been 53,600 residents.



Annual migration flows for NGAA LGAs, 2016-2021 (source: ABS RIME by LGA)

6. Cultural diversity

Cultural diversity characteristics indicate the population living in an area and inform any plans or strategies that assist community engagement and the need for appropriate community services.

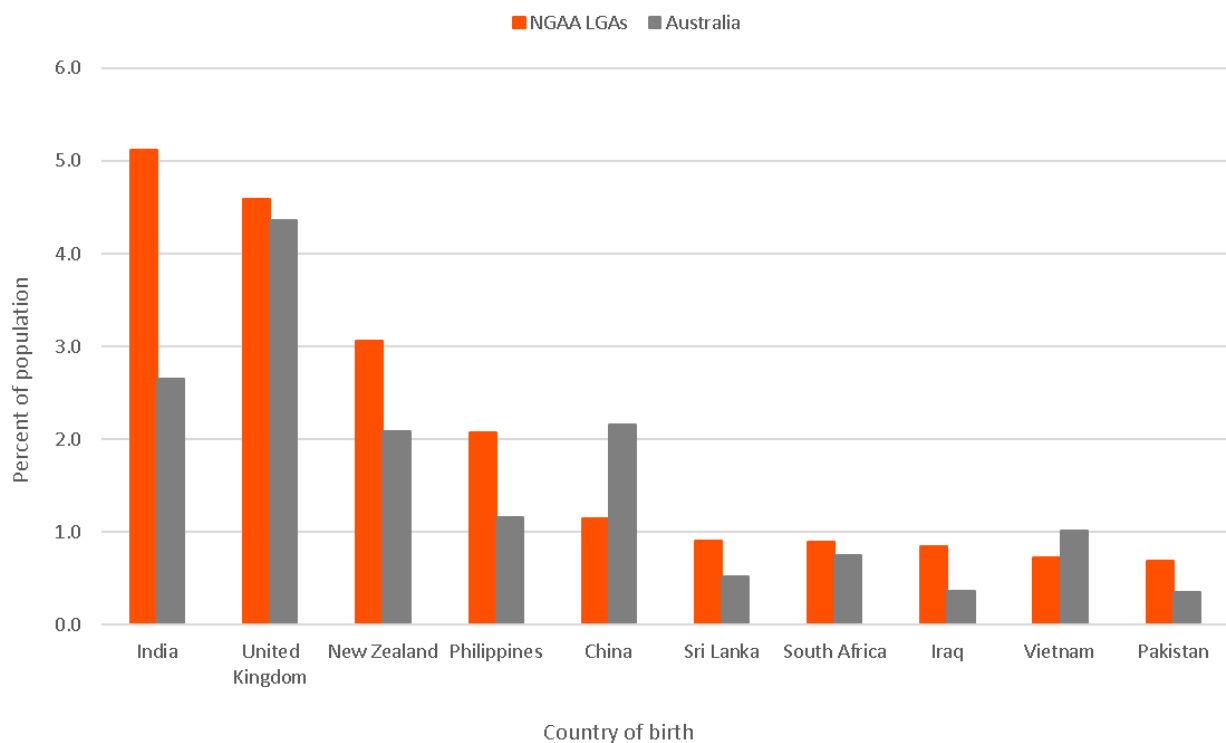
6.1 Birthplace

Country of Birth data identifies where people were born and indicates the level of cultural diversity in NGAA LGAs. The mix of the country of birth groups is also indicative of historical settlement patterns, as source countries for Australia's immigration program have varied significantly over time.

- ▣ In 2021, 33.4% of all residents in NGAA LGAs were born overseas, a proportion higher than in Australia (27.7%).
- ▣ Since 2016, the proportion of overseas-born residents in NGAA LGAs has increased by 2.6%.

The top overseas birthplace of residents in NGAA LGAs is India, with 5.1% of all residents being born there, a proportion almost twice that of Australia's population overall (2.6%). The United Kingdom was the second most common non-Australian birthplace (4.6%), similar to Australia as a whole (4.4%) and New Zealand as the third most common birthplace (3.1% compared to 2.1% in Australia).

NGAA LGAs had notably higher proportions of residents born in India, New Zealand and the Philippines than Australia's overall population and notably lower proportions of residents born in China (1.1% compared to 2.2% in Australia).



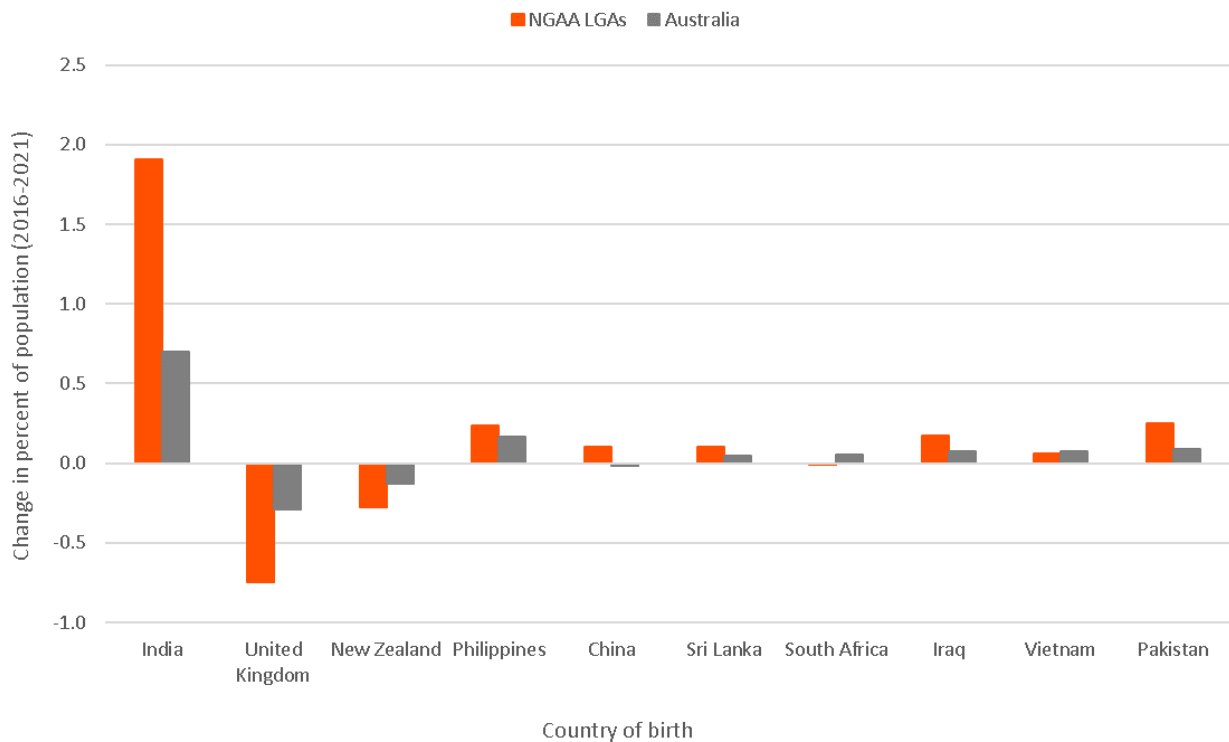
Top 10 countries of birth in NGAA LGAs, 2021 (source: ABS)

Country of birth	Number	NGAA LGAs %	Australia %
India	266,913	5.1%	2.6%
United Kingdom	239,859	4.6%	4.4%
New Zealand	159,861	3.1%	2.1%
Philippines	108,430	2.1%	1.2%
China	59,695	1.1%	2.2%
Sri Lanka	47,522	0.9%	0.5%
South Africa	46,632	0.9%	0.7%
Iraq	44,343	0.8%	0.4%
Vietnam	37,635	0.7%	1.0%
Pakistan	36,013	0.7%	0.4%

Detailed figures on top 10 countries of birth in NGAA LGAs, 2021 (source: ABS)

Between 2016 and 2021, the proportion of residents in NGAA LGAs born in India increased by 1.9%, a proportion significantly higher than in Australia (0.7%). On the other hand, the proportion of United Kingdom-born residents decreased by 0.7% and New Zealand by 0.3%. Both birthplaces decreased in Australia too, at a lower rate.

Some birthplaces increased in NGAA LGAs, but at a lower rate, such as the Philippines (+0.2%), Iraq (+0.2%) and Pakistan (+0.2%).



Change in percentage of population by country of birth, 2016-2021 (source: ABS)

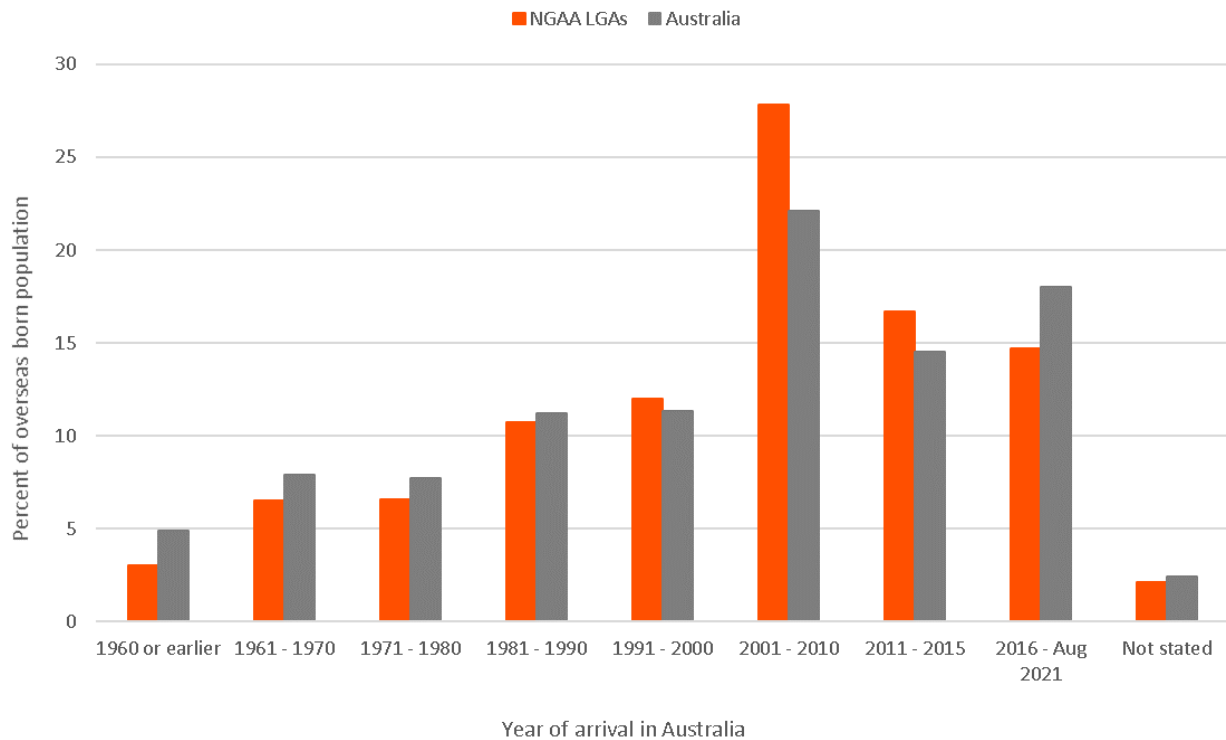
6.2 Overseas arrivals

Year of arrival data records when the overseas-born population arrived in Australia. The data shows the degree to which areas are 'ports' for new overseas arrivals and reveals the role of NGAA LGAs in housing the overseas-born. The number of recent overseas arrivals in an area is often determined by housing affordability, employment opportunities and pre-existing communities located in the area.

A third of all NGAA LGA residents were born overseas. In absolute terms, this was 1,743,000 residents. Most of them are relatively recent arrivals in Australia, with 28% arriving between 2001 and 2010, a proportion higher than Australia (22%). Almost 17% of overseas-born NGAA LGA residents arrived in Australia between 2011 and 2015, again a proportion higher than for Australian overall (14.5%). However, a higher proportion of total residents in Australia

arrived in the most recent period (2016-2021) than was the case for NGAA LGA residents. This is likely related to migration patterns and a likelihood that recent overseas arrivals may settle in some more traditional greater capital city “ports” before migrating to growth areas.

The proportion of overseas-born NGAA LGA residents who arrived in Australia before 1991 is lower than for Australia overall, illustrating that growth areas are more likely to be home to relatively recent arrivals in Australia.



Year of arrival for NGAA LGA residents, 2021 (source: ABS)

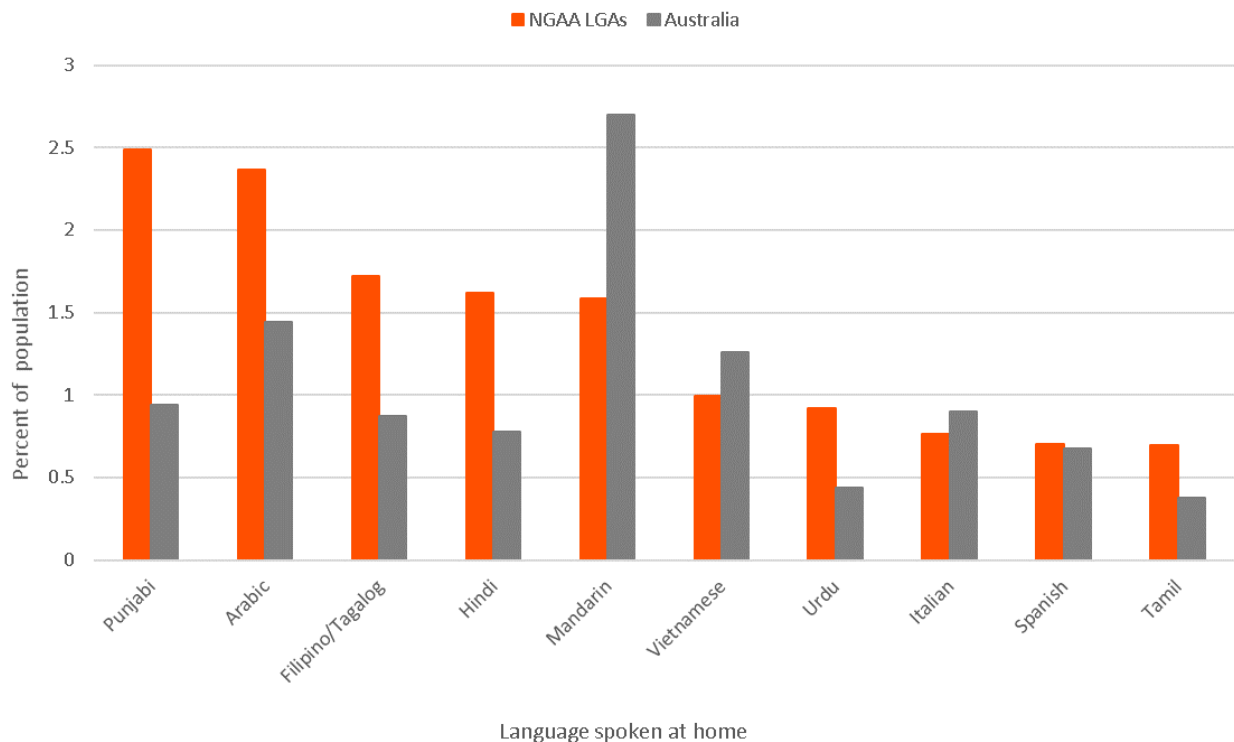
6.3 Languages spoken and English proficiency

Language statistics show the proportion of the population who speak a language at home other than English. They indicate how culturally diverse a population is and the degree to which different ethnic groups and nationalities retain their language.

In 2021, 28.8% of residents living in NGAA LGAs spoke a language other than English at home. This was higher than in Australia as a whole (22.3%) and an increase of 4% since 2016, when 24.8% of residents living in NGAA LGAs spoke a language other than English at home.

The most spoken non-English language in 2021 was Punjabi., with 2.5% of the population and significantly higher than in Australia overall (0.9%) and relates to the high proportion of Indian-born residents in NGAA LGAs. This was closely followed by Arabic (2.4% and higher than Australia, 1%). Filipino/Tagalog was spoken by 1.7% of the population and was also higher than in Australia (0.9%). Another Indian-spoken language, Hindi, was higher in proportion in NGAA LGAs (1.6%) than in Australia (0.8%).

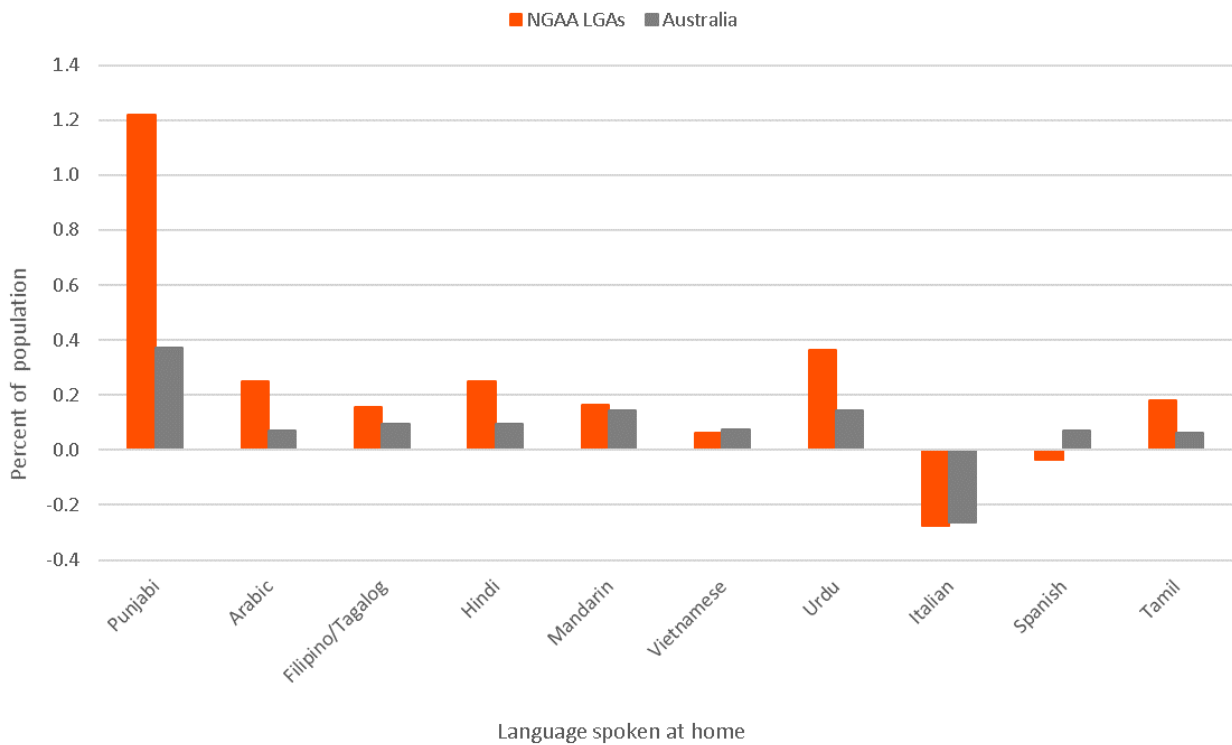
Other languages spoken at home more commonly in NGAA LGAs were Urdu (0.9% compared to 0.4% in Australia) and Tamil (0.7% compared to 0.4% in Australia). Conversely, Mandarin was spoken at home less in NGAA LGAs (1.6%) than in Australia overall (2.7%) and, to a lesser degree, Italian (0.8% in NGAA LGAs and 0.9% in Australia as a whole).



Top 10 languages other than English spoken at home, NGAA LGAs, 2021 (source: ABS)

Since 2016, the proportion of residents in NGAA LGAs who speak Punjabi has increased by 1.2%. Urdu was the second highest proportional increase with 0.4%, followed by Hindi (+0.3%), Arabic (+0.2%) and Filipino/Tagalog (+0.2%). The only commonly spoken language that decreased was Italian (-0.3% in both NGAA LGAs and Australia), which is related to the age of Italian speakers, primarily older people that migrated to Australia after World War II. As

they get older and pass away, the numbers of Italian-born and Italian-speaking residents decrease.



Change in proportion of residents speaking top 10 languages, NGAA LGAs, 2021 (source: ABS)

English proficiency measures the self-assessed proficiency in spoken English of people who speak a language other than English at home.

In NGAA LGAs:

- ▣ 65.7% of residents spoke English only (in 2021), compared to 72% of Australian residents.
- ▣ 25.2% of residents spoke English and another language well or very well, compared to 19.1% of Australian residents.
- ▣ 3.9% spoke another language but did not speak English well or at all, compared to 3.4% of Australia. This figure is referred to as poor English proficiency.

Since 2016:

- ▣ The proportion of NGAA LGA residents who spoke English only decreased by 3.7%
- ▣ The proportion who spoke another language but also spoke English well/very well increased by 4%.
- ▣ The proportion of NGAA LGA residents with poor English proficiency increased by 0.2%.

7. Health

The health characteristics of NGAA LGAs reflect the population living in the area, their demographic characteristics such as age, socio-economic status, and access to healthcare and medical services. This report observes health through two primary datasets: “need for assistance due to disability” and “long-term health conditions”, both self-reported datasets from the Census.

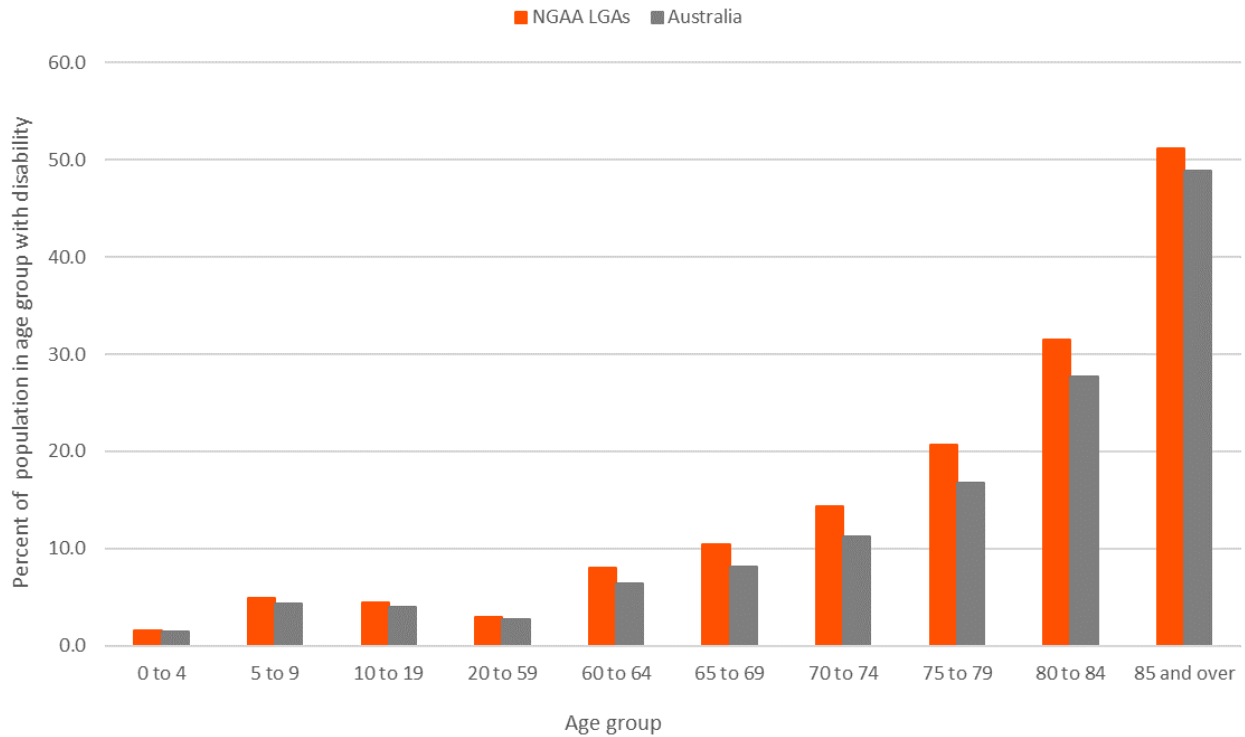
7.1 Need for assistance due to disability

Need for assistance due to disability statistics relates directly to need for assistance due to a severe or profound disability. The information may be used in planning local facilities, services such as day-care and occasional care and in providing information and support to carers. NGAA LGA disability statistics help understand the prevalence of people who need support in the community, along with information on unpaid care to a person with a disability, how that support is provided.

In 2021, 5.7% of the population living in NGAA LGAs needed assistance due to disability, a proportion slightly lower than in Australia (5.8%), and an increase of 0.7% since 2016. In absolute terms, 296,159 people were living in NGAA LGAs who needed assistance due to disability in 2021.

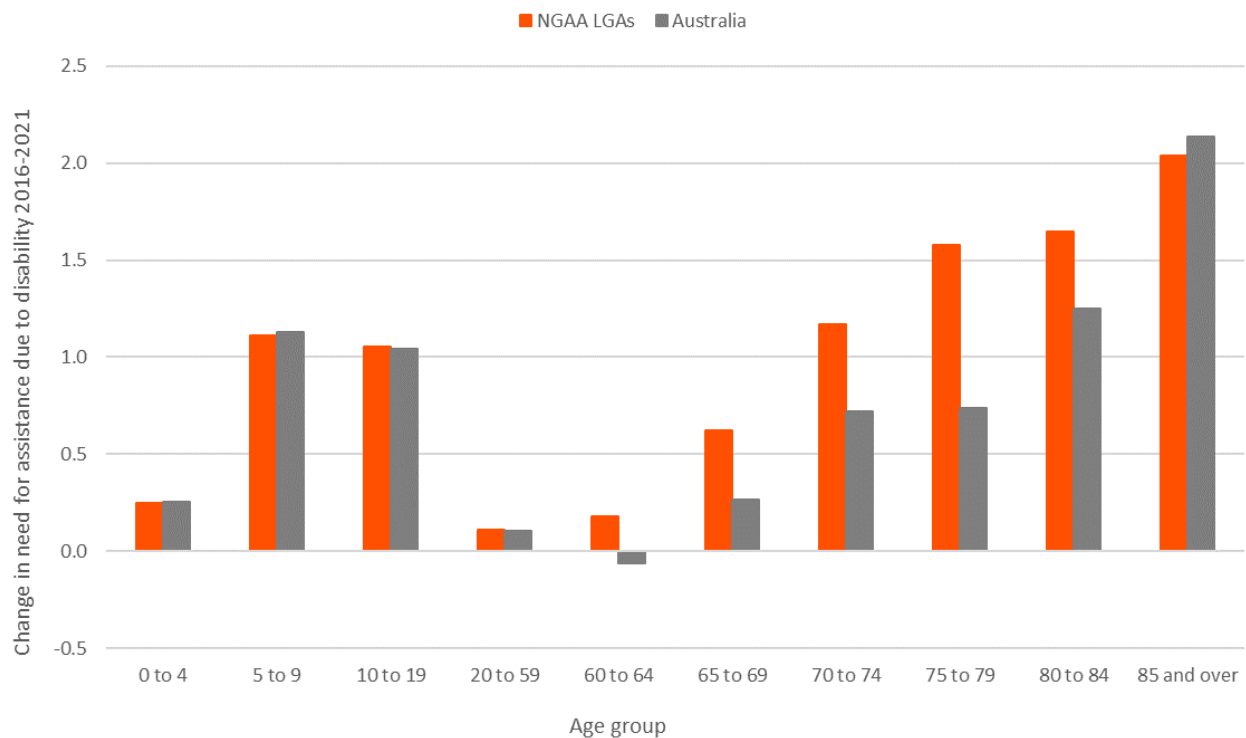
Disability is strongly related to age, so the proportion of residents within an age group with a disability increases with age. Still, the proportions differ from place to place due to other factors. For example, in NGAA LGAs, the need for assistance due to disability was usually higher in all age groups compared to Australia. This is most evident from age 65 and upwards, where the population in NGAA LGAs have a higher proportion of need for assistance due to

disability. For example, in 2021, 19.9% of NGAA LGA residents aged 65 years or older needed assistance due to disability, compared to 18% of Australian residents aged 65 years or older.



Need for assistance by age group, NGAA LGAs, 2021 (source: ABS)

Between 2016 and 2021, the most significant increases in the proportion of residents needing assistance due to disability in NGAA LGAs were in the 70 and older age groups. These increases, apart from 85+-year-olds, were all higher than was recorded for Australia as a whole, indicating that need for assistance for older NGAA LGA is increasing at a higher rate than for the same age groups across Australia as a whole.



Change in need for assistance by age group, NGAA LGAs, 2016-2021 (source: ABS)

7.2 Long-term health conditions

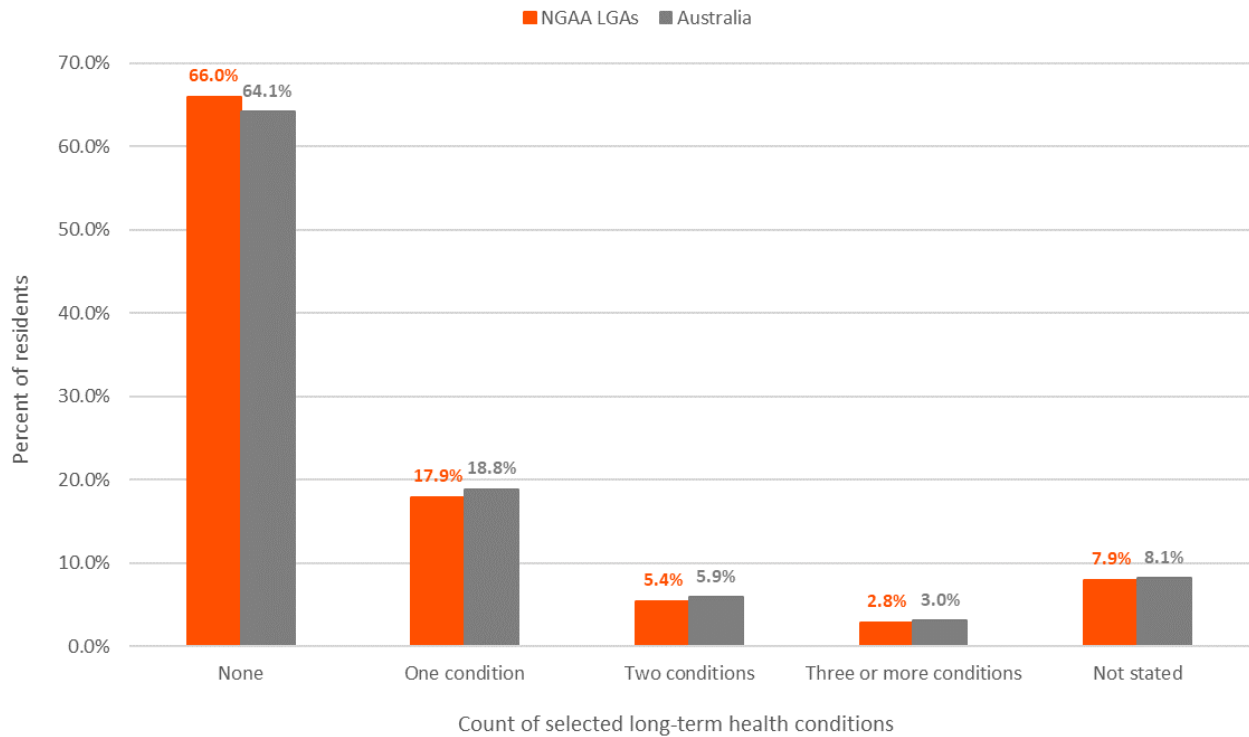
The 2021 Census looked for the first time at the incidence of selected long-term health conditions in the community. The Census question asked respondents if they have been diagnosed with a specific condition (or other condition) from a list of ten conditions plus "other". Combined, these ten conditions comprise approximately 60% of Australia's deaths, and even those that are not deadly contribute substantially to the disease burden.

It is well known that demographic characteristics such as age and socio-economic factors also contribute to morbidity and health outcomes, with lower-socio economic characteristics correlated with a higher incidence of some health conditions. Including this topic in the Census enables these factors to be explored in more detail.

Almost a third of all NGAA LGA residents (30.1%) had at least one long-term health condition, a proportion lower than in Australia (31.7%) and likely related to a younger age structure of NGAA LGAs.

NGAA LGAs had lower proportions for all categories of "counts of condition", where a lower proportion of residents had one condition (17.9% compared to 18.8% in Australia), two

conditions (5.4% compared to 5.9% in Australia) and three conditions (2.8% compared to 3% in Australia). In absolute terms, 148,182 NGAA LGA residents had three or more long-term health conditions.



Count of long-term health conditions for NGAA LGA residents, 2021 (source: ABS)

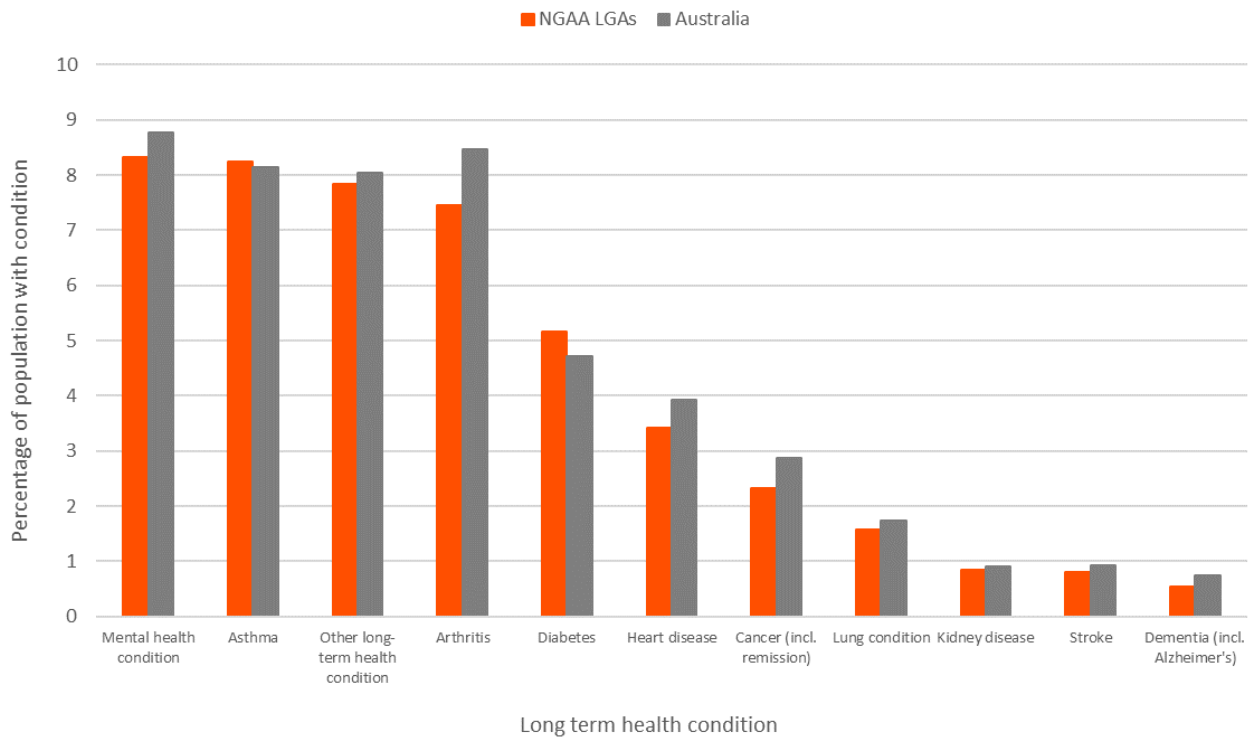
The most prevalent long-term health condition in NGAA LGAs is mental health, with 8.3% of residents (434,621) reporting as having been diagnosed with a mental health condition. This proportion is slightly lower than in Australia (8.8%). Asthma is the second most prevalent condition in NGAA LGAs (also 8.3%) and is somewhat higher than in Australia (8.1%). The “other long-term health conditions” group is the third most common, with 7.8% of NGAA LGA residents reporting having long-term health conditions other than the ones provided to choose from. It is unknown what other conditions this group contains, but the category was slightly lower than in Australia (8%).

Compared to Australia, residents in NGAA LGAs had higher proportions of these long-term health conditions:

- ▾ Diabetes (0.5% higher than Australia)
- ▾ Asthma (0.1% higher)

And lower proportions of these long-term health conditions:

- ▾ Arthritis (1% lower than Australia. *Age is a strong confounding factor with arthritis and relates to the younger age structure of NGAA LGAs*)
- ▾ Cancer (0.6% lower)
- ▾ Heart disease (0.5% lower)
- ▾ Mental health (0.5% lower)
- ▾ Dementia, incl. Alzheimer's (0.2% lower)



Long-term health conditions, by type of condition in NGAA LGAs, 2021 (source: ABS)

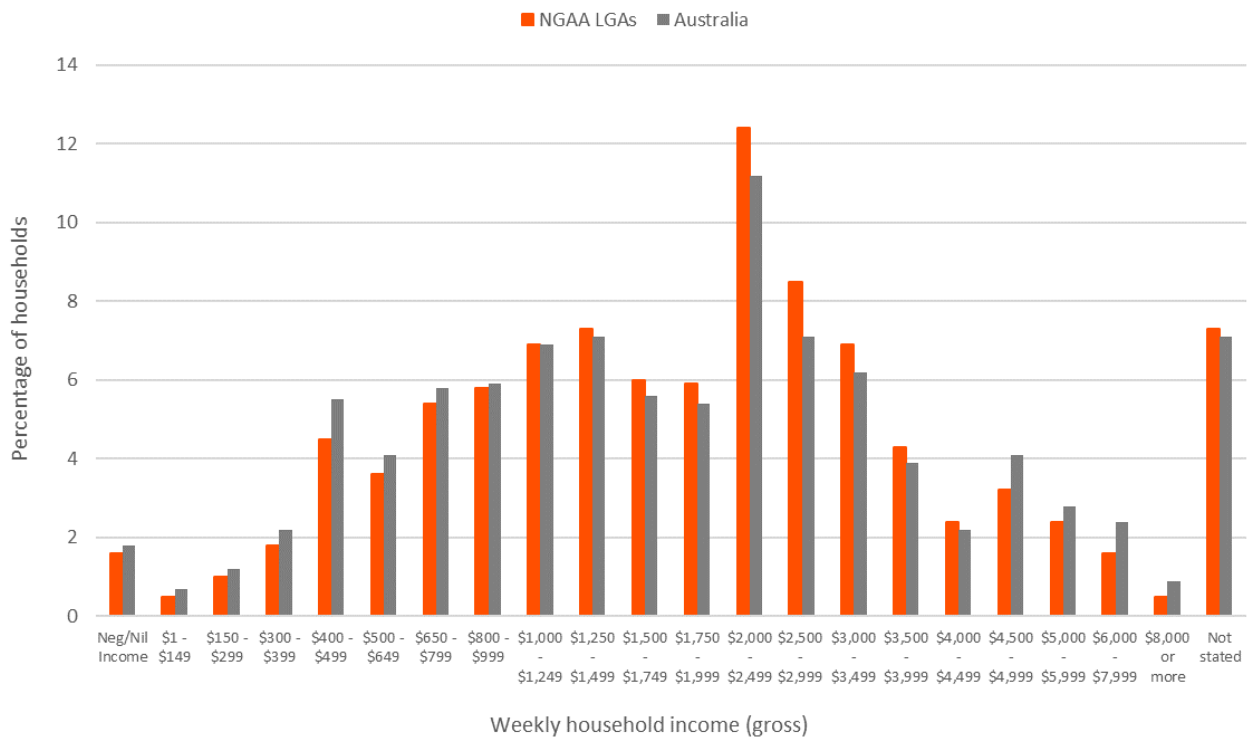
8. Household income

Household Income is one of the most important indicators of socio-economic status. Other data sources, such as “qualifications” and “occupation”, it helps to reveal the economic opportunities and socio-economic status of NGAA LGAs. However, it is important to note that income data is not necessarily a measure of wealth. For example, if an area has many retirees, this will produce a higher proportion of low-income households, but the retirees may have large capital wealth. For this reason, household income should be viewed in conjunction with age and household composition.

The median weekly household income in NGAA LGAs was \$1,827 in 2021, an increase of \$298 (19%) since 2016. The median income in NGAA LGAs is higher than in Australia (\$1,740). Change over time of income data is best done with quartile analysis, which is presented later in this section.

Compared to Australia, NGAA LGAs had a lower proportion of low-income households, a slightly higher of middle-income households and a lower proportion of high-income households. By defining low-income households as those with incomes below \$800 per week, middle-income as those between \$800 and \$3,000 per week and high-income as those over \$3,000 per week:

- ▣ NGAA LGAs have a lower proportion of low-income households than Australia (18.4% compared to 21.3%)
- ▣ A higher proportion of middle-income households than in Australia (52.8% compared to 49.2%) and
- ▣ A lower proportion of high-income households than Australia (21.3% compared to 22.5%).



Weekly household income for NGAA LGAs, 2021 (source: ABS)

Within Australian NGAA LGAs, New South Wales LGAs had the highest household income in 2021 (\$2,072), and South Australian LGAs had the lowest (\$1,371) but recorded the highest percentage increase since 2016.

Area	Median household income	Change since 2016
Growth areas in NSW	\$2,072	+19%
Growth areas in QLD	\$1,652	+15%
Growth areas in SA	\$1,371	+24%
Growth areas in Vic.	\$1,862	+24%
Growth areas in WA	\$1,767	+13%
Australia	\$1,740	+21%

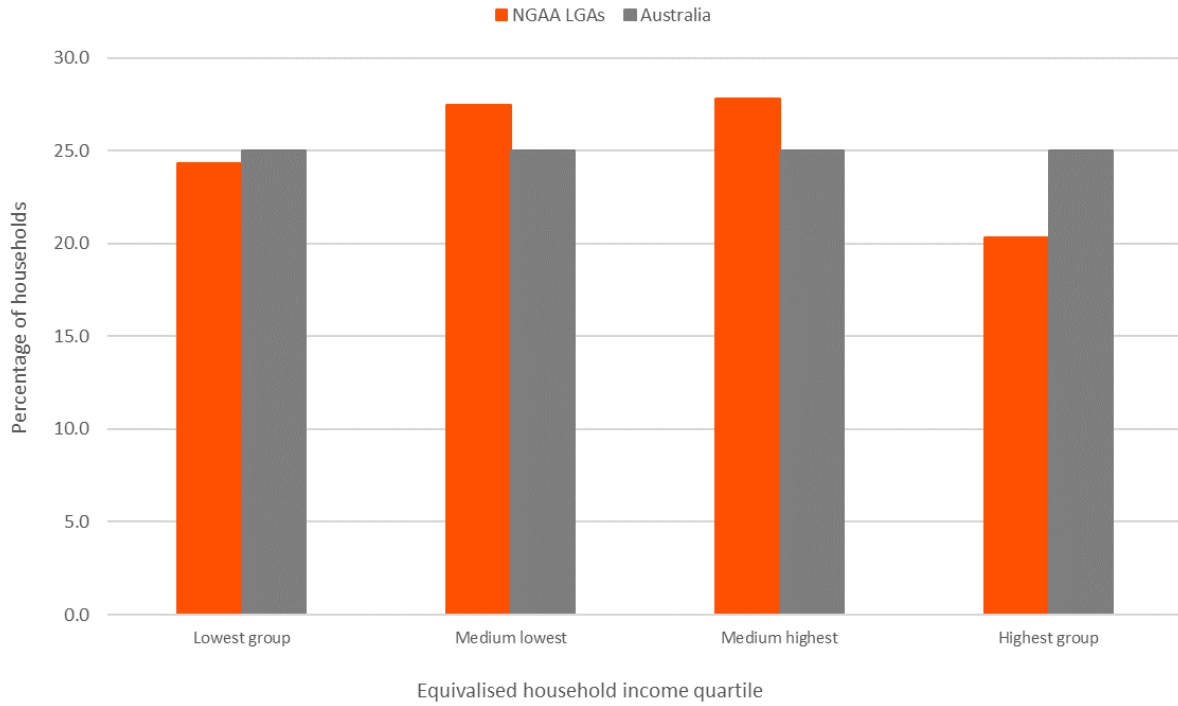
Median household incomes for NGAA LGAs by State/Territory, 2021 (source: ABS)

8.1 Equivalised household income

While household income is a valuable statistic, it is difficult to tell if changes over time and between geographic areas are due to actual changes in income levels or household size and composition. For example, an increase in lower-income households could be due to job losses in key economic sectors or decreased household size as adult children leave home.

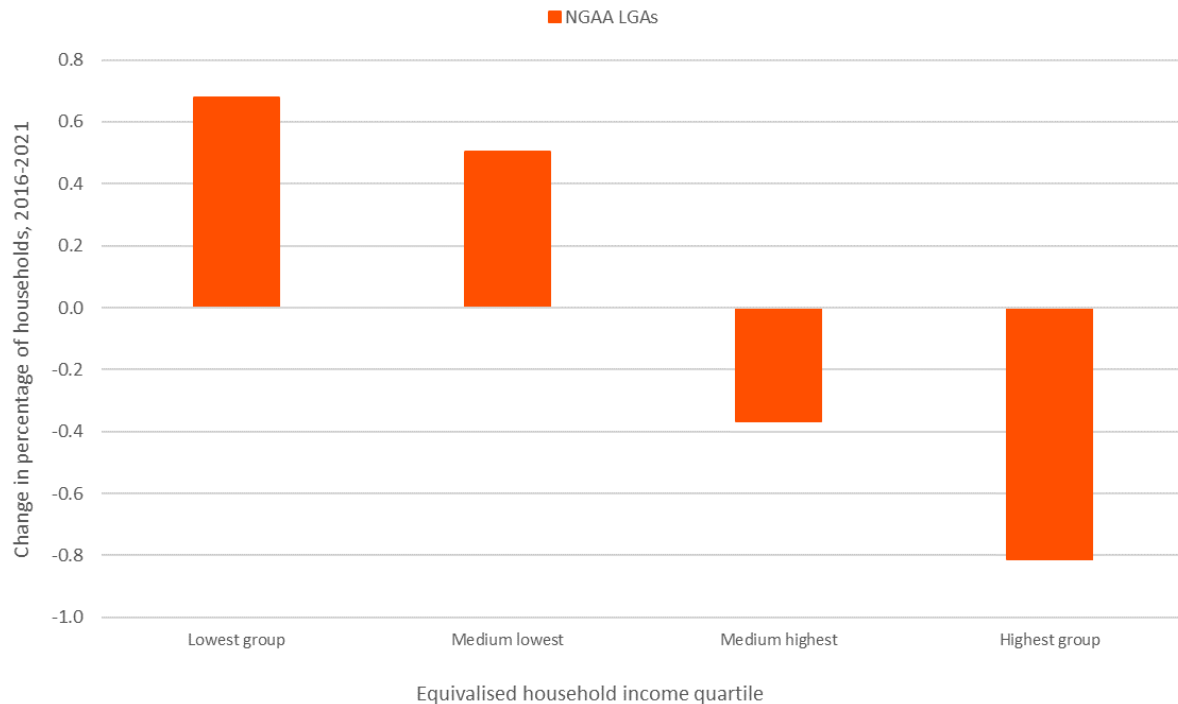
Equivalised Household Income puts all households on an equal footing independent of household size and composition to enable a true comparison between areas and over time. It is an indicator of the income resource available to a household of standard size. It is the best measure of the changing economic fortunes of households living in NGAA LGAs.

Similar to the low/medium/high household income breakdowns, NGAA LGAs had a smaller proportion of households in the lowest quartile (24.4% compared to 25% for Australia) and larger proportions of households in the medium lowest and medium highest quartiles (27.5% and 27.8%, respectively, compared to 25% for both in Australia). NGAA LGAs had a notably smaller proportion of households in the highest group than Australia (20.4% compared to 25%).



Equivalised household income, NGAA LGAs, 2021 (source: ABS)

Since 2016, household income in NGAA LGAs has decreased when assessed via equivalised household income quartiles. In 2021, a more significant proportion of NGAA households will have incomes in the lowest and medium lowest quartiles compared to 2016. Conversely, the proportion of NGAA LGA households in the medium highest and highest income quartiles has decreased since 2016, indicating lower household incomes from this perspective.



Change in equivalised household income ranges for NGAA LGA households, 2016-2021 (source: ABS)

The quartile group dollar ranges for 2021 and 2016 are:

Equivalised household income ranges	2021	2016
Lowest group	\$0 to \$598	\$0 to \$497
Medium lowest	\$599 to \$1,069	\$498 to \$877
Medium highest	\$1,070 to \$1,706	\$878 to \$1,420
Highest group	\$1,707 and over	\$1,421 and over

Equivalised household income - Quartile group dollar ranges

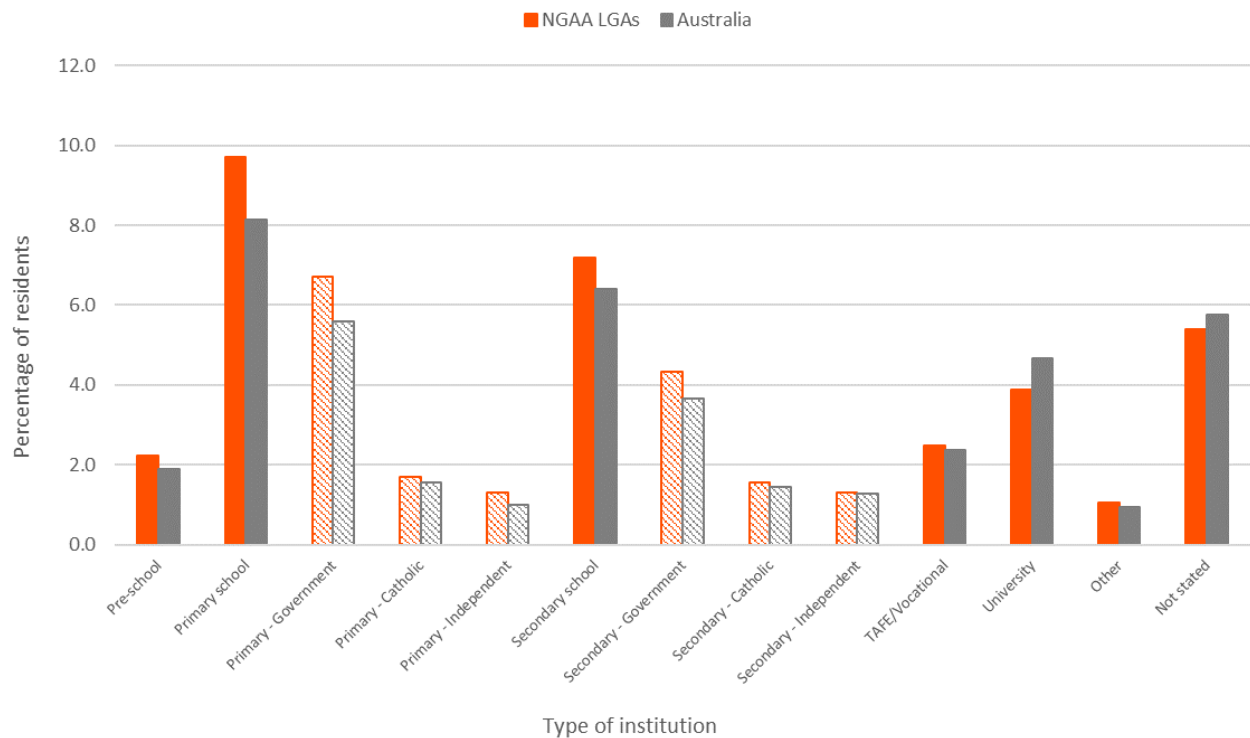
9. Education

9.1 Education institution attending

The share of NGAA LGA population attending educational institutions reflects the age structure of the population, as the number of children attending school influences it; proximity to tertiary education, which can mean young adults leaving home to be nearer to educational facilities and; the degree to which people are seeking out educational opportunities in adulthood, especially in their late teens and early twenties.

In 2021, 26.5% of the total NGAA LGA population attended an education institution, a proportion higher than in Australia (24.4%). Most attend primary school (9.7%), followed by secondary school (7.2%). NGAA LGA attendance of both primary and secondary schools is higher than Australia as a whole and is reflective of the younger age of NGAA LGA population. Attendance statistics for types of primary or secondary schools (government, Catholic or independent) is reliant on local availability of such education providers.

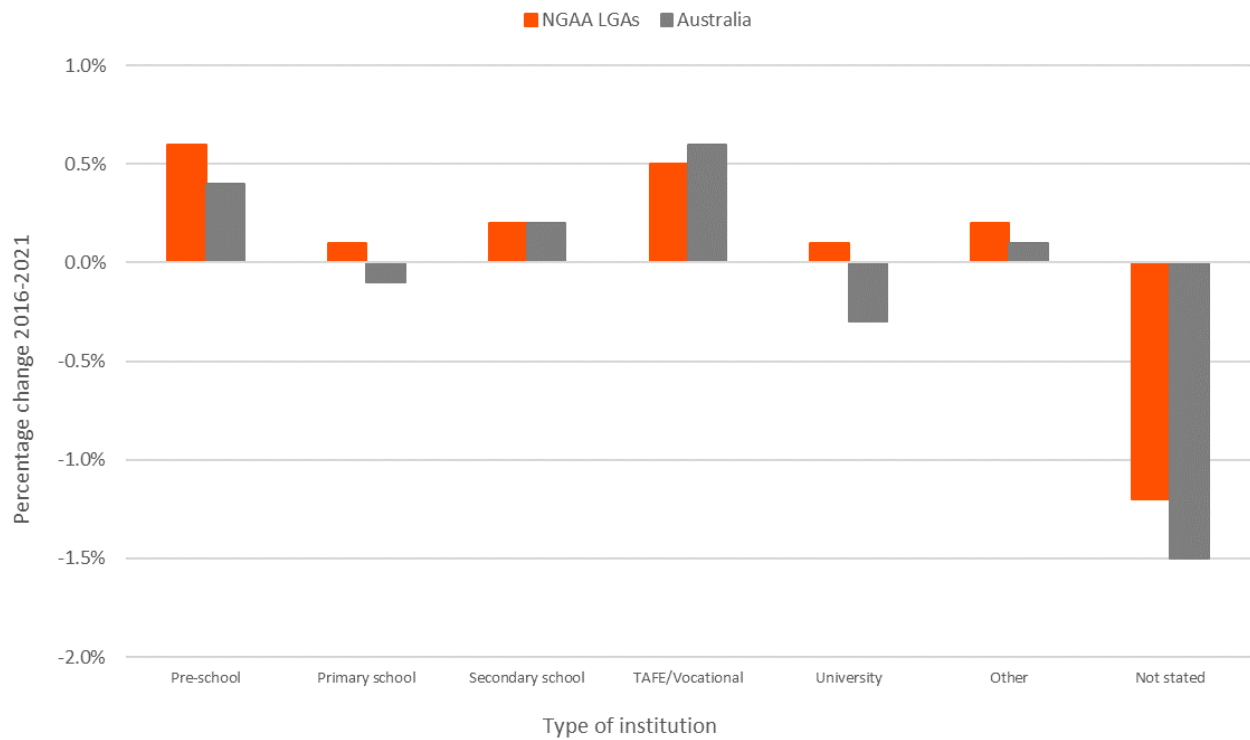
A lower proportion of people living in NGAA LGAs attended a university (3.9%) than in Australia (4.7%) but a slightly higher proportion attended a TAFE or other vocational education institution (2.5%) than in Australia (2.4%).



Education institutions attended by residents in NGAA LGAs, 2021 (source: ABS)

Since 2016, the largest change in this data has been a decrease in the “Not stated” category, indicating that data quality has improved. However, this can over-inflate figures for some of the categories as more people are now answering this question than in 2016.

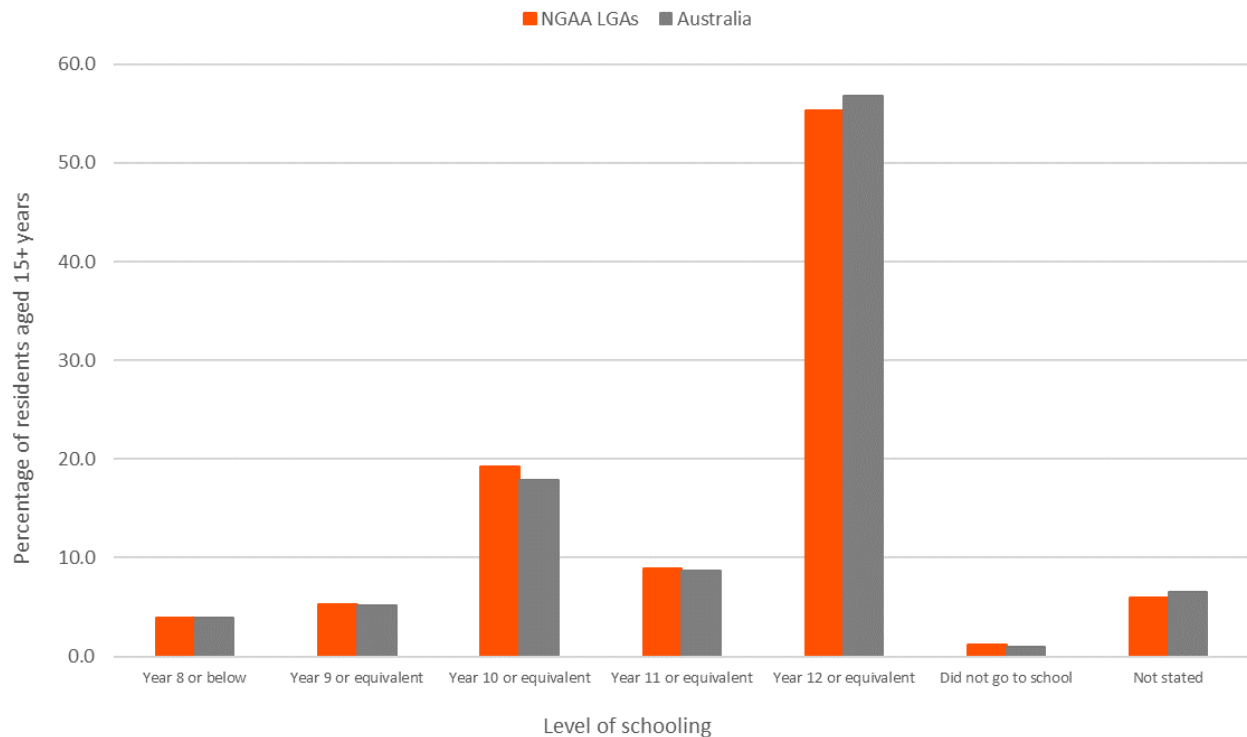
For the type of education institution, the most significant increase in NGAA LGAs was for pre-school attendance (an increase of 0.6% since 2016) and TAFE/Vocational institutions (an increase of 0.5% since 2016). Compared to Australia, NGAA LGAs recorded a larger increase in pre-school attendance over time, a statistic related to the age structure and migration patterns by the age of NGAA LGAs. University attendance has also increased in NGAA LGAs since 2016 (0.1%), whereas Australia decreased by 0.3%.



Change in education institution attendance, NGAA LGAs, 2016-2021 (source: ABS)

Most residents aged 15 years or older in NGAA LGAs completed Year 12 as their highest level of schooling (55.4%). This was slightly lower than for Australia (56.8%). Similar proportions of residents in NGAA LGAs and Australia completed Year 8-11 as their highest levels of schooling with slightly higher NGAA LGA representation for Year 10 (19.2% compared to 17.9% for Australia). In both NGAA LGAs and Australia, very low proportions of residents aged over 15 years did not go to school (1.2% compared to 1% in Australia). In absolute terms, 50,709 NGAA LGA residents aged 15 years or older did not attend school.

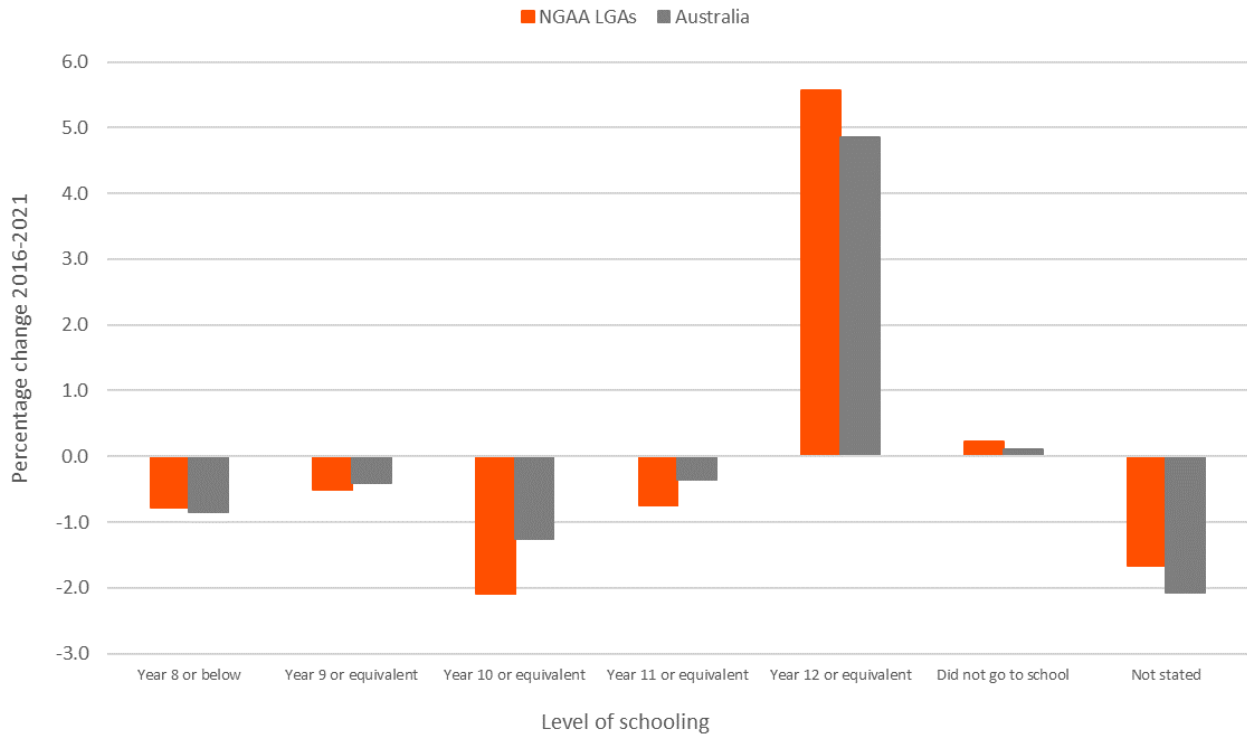
9.2 Highest level of schooling



Highest level of schooling completed by NGAA LGA residents, 2021 (source: ABS)

Over time, the most significant increase in terms of the highest level of schooling completed was for Year 12 or equivalent, a rise of 5.6% since 2016, suggesting a higher proportion of NGAA LGA residents aged 15 years and older completing secondary school. The same trend was recorded for Australia, where 4.9% more residents aged 15 years or older completed Year 12 or equivalent compared to 2016.

As with education institution attendance, the not stated category decreased significantly in both NGAA LGAs and Australia between 2016 and 2021, resulting in more complete and improved data but possibly a hindrance in trend analysis.

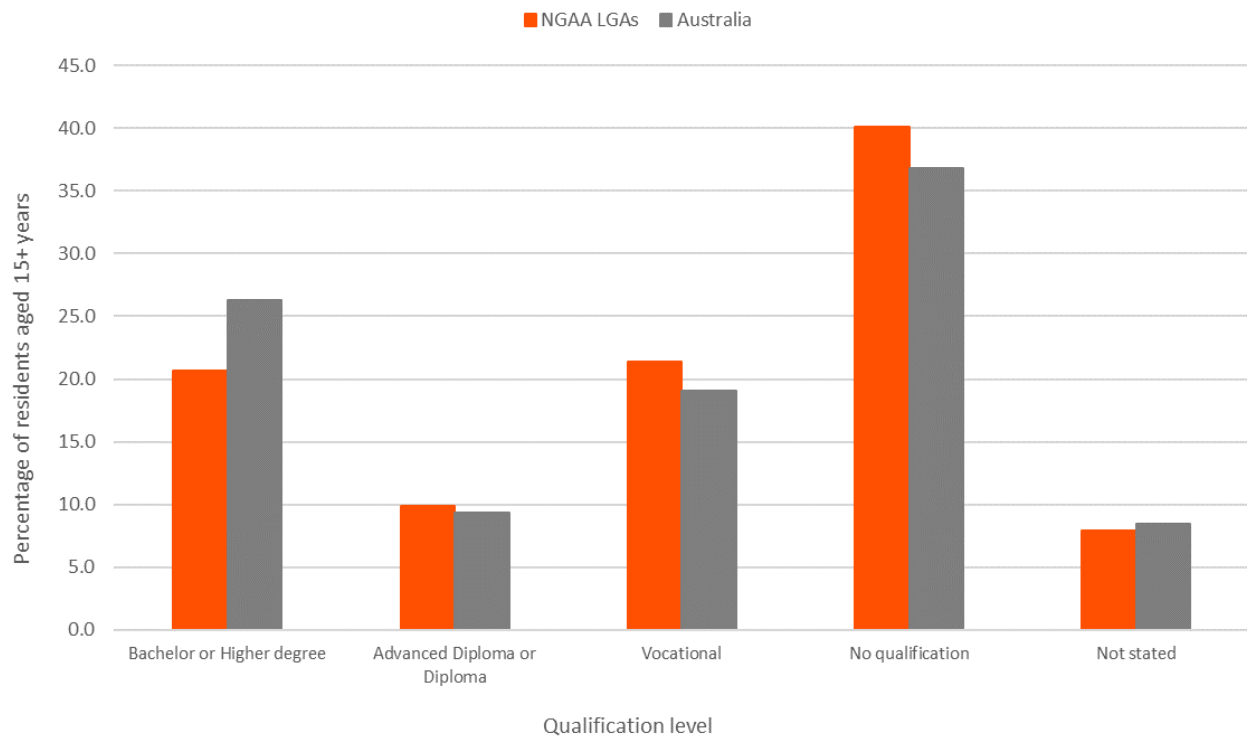


Change in highest level of schooling completed for NGAA LGA residents, 2016-2021 (source: ABS)

9.3 Highest qualification achieved

The highest qualification achieved relates to education outside primary and secondary school and is one of the most important indicators of socio-economic status.

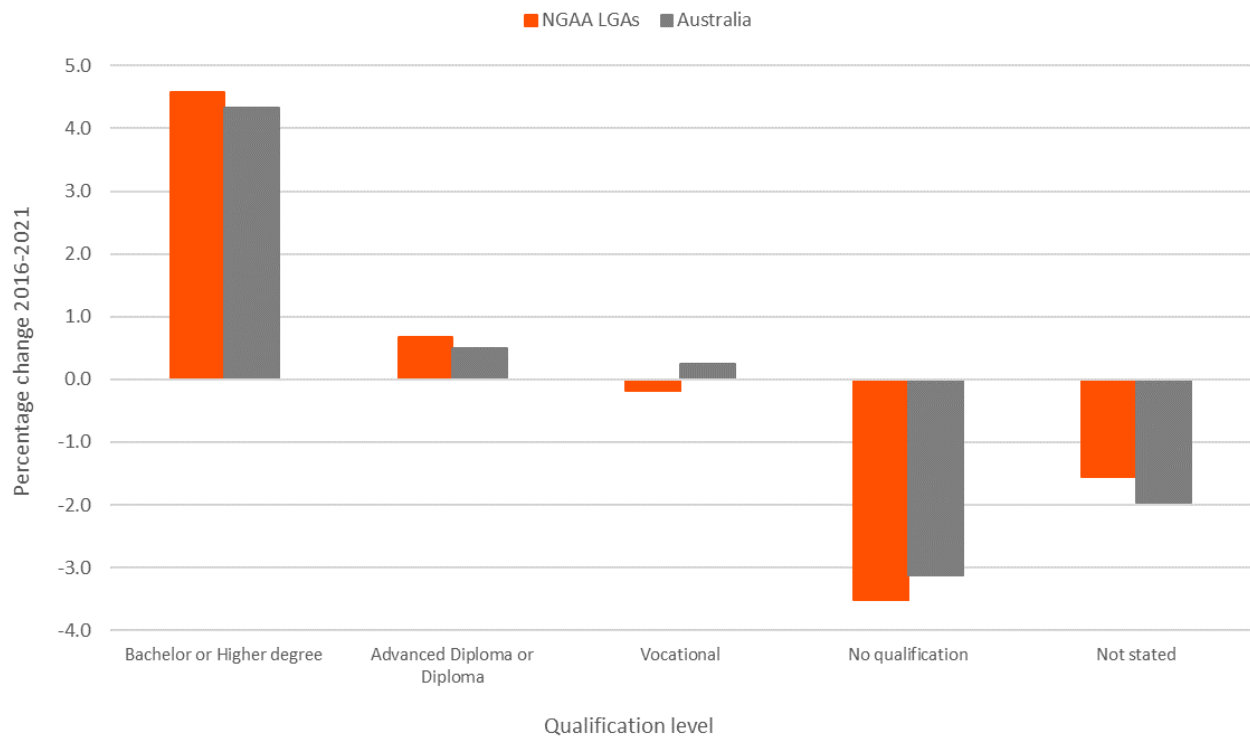
Most residents aged over 15 years in NGAA LGAs had no education qualification outside of primary and secondary school. In NGAA LGAs, 40.1% of residents were in this category compared to 36.8% in Australia. Vocational qualifications were most common in NGAA LGAs (21.4%) and higher than in Australia (19.1%). NGAA LGAs had a lower proportion of residents with a Bachelor or Higher Degree (20.7%) than Australia (26.3%). Similar proportions of residents in NGAA LGAs and Australia had an Advanced Diploma or Diploma (9.9% compared to 9.4%).



Highest qualification achieved for NGAA LGA residents, 2021 (source: ABS)

Over time, the proportion of NGAA LGA residents aged over 15 with no qualifications decreased by 3.5% since 2016. This was also the case in Australia, with a 3.1% decrease in no qualification. The most significant increase in NGAA LGAs was for Bachelor or Higher Degree qualifications, an increase of 4.6% since 2016, higher than in Australia (4.3% increase).

Vocational qualifications decreased slightly over time in NGAA LGAs (-0.2%, compared to 0.2% increase in Australia), and Advanced Diploma/Diplomas as the highest qualification increased by 0.7% in NGAA LGAs and by 0.5% in Australia as a whole.



Change in highest qualification achieved for NGAA LGA residents, 2016-2021 (source: ABS)

10. Employment

10.1 Labour force participation and employment status

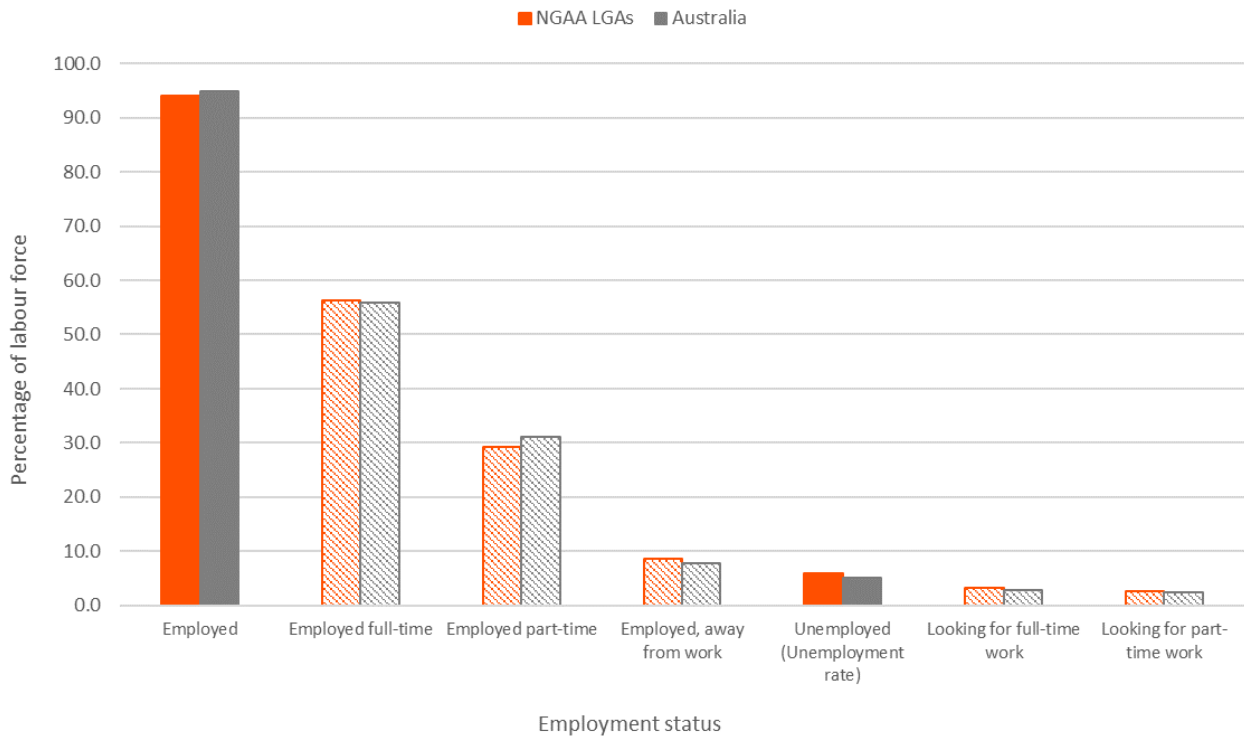
Employment statistics are a significant indicator of socio-economic status. The levels of full or part-time employment, unemployment and labour force participation indicate the strength of the local economy and social characteristics of the population. Employment status is linked to several factors, including age structure, which influences the number of people in the workforce; the economic base and employment opportunities available in the area and; the education and skill base.

Almost 63% of persons aged 15 years or older in NGAA LGAs were in the labour force, meaning they were either employed or looking for work and available to start. Both full and part-time work counts towards the labour force. Australia had a slightly lower proportion of people aged 15 years or older in the labour force (61.1%).

Since 2016, labour force participation in NGAA LGAs remained almost identical, with a slightly 0.1% decrease in the participation rate. On the other hand, the participation rate in Australia has increased by 0.8% since 2016.

A slightly lower proportion of the NGAA LGA labour force is employed (94.1%) than Australia's labour force (94.9%). A somewhat higher proportion of the NGAA LGA labour force is employed full-time (56.3%) than in Australia (55.9%). Conversely, a lower proportion is employed part-time, compared to Australia (29.3% compared to 31.2%).

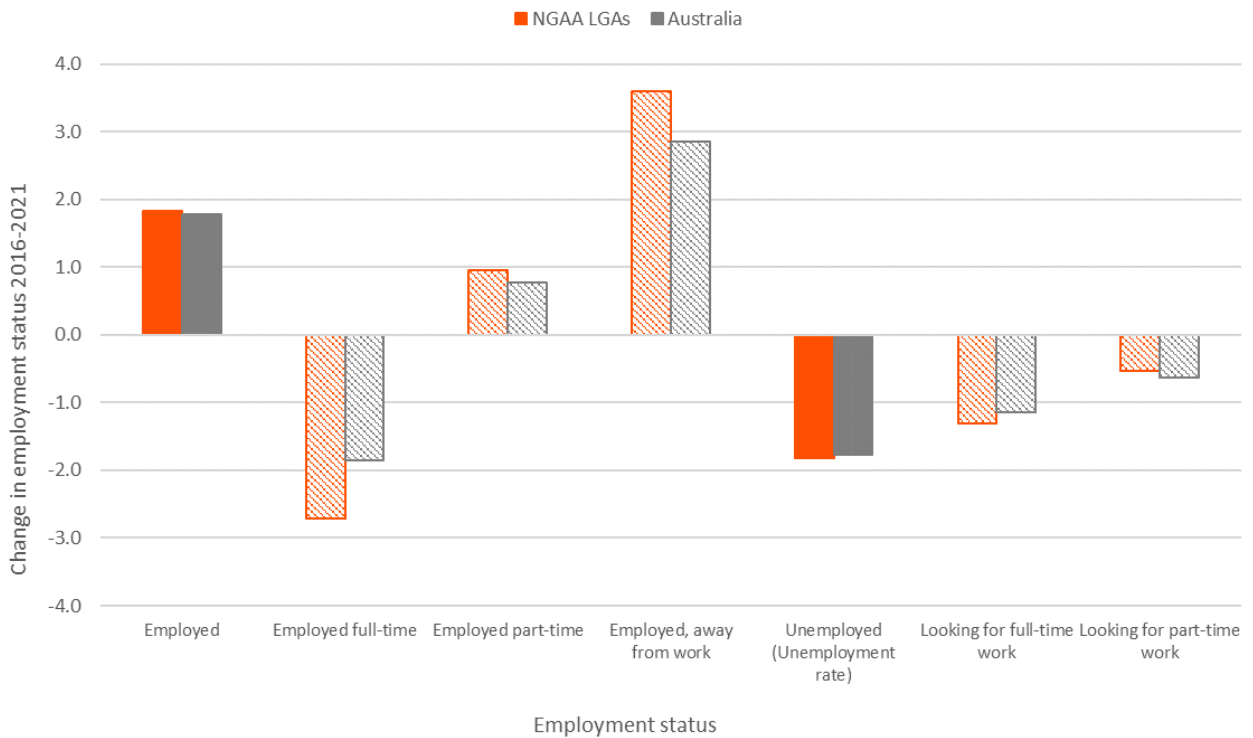
Almost 6% of the NGAA LGA labour force was unemployed in 2021 (5.9%), a proportion higher than for Australia's labour force (5.1%). Of those unemployed, similar proportions were looking for full-time or part-time work.



Employment status of the NGAA LGA labour force, 2021 (source: ABS)

Between 2016 and 2021, the NGAA LGA labour force recorded a 1.8% increase in employment, the same percentage as Australia. In the same period, the make-up of employed residents changed, however. There was a decrease in the proportion of full-time employed residents of 2.7%, higher than the decrease in Australia (1.9%), a slight increase in part-time employment (0.9%) and a notable increase in being employed, but way from work (3.6%, compared to 2.8% for Australia). The ABS categorise persons away from work as either full-time or part-time employed based on the usual hours worked. The category of “employed but away from work” is likely to be higher in many areas in 2021 due to lockdowns.

Unemployment decreased in NGAA LGAs by 1.8%, a proportion identical to Australia.



Change in employment status of the NGAA LGA labour force, 2016-2021 (source: ABS)

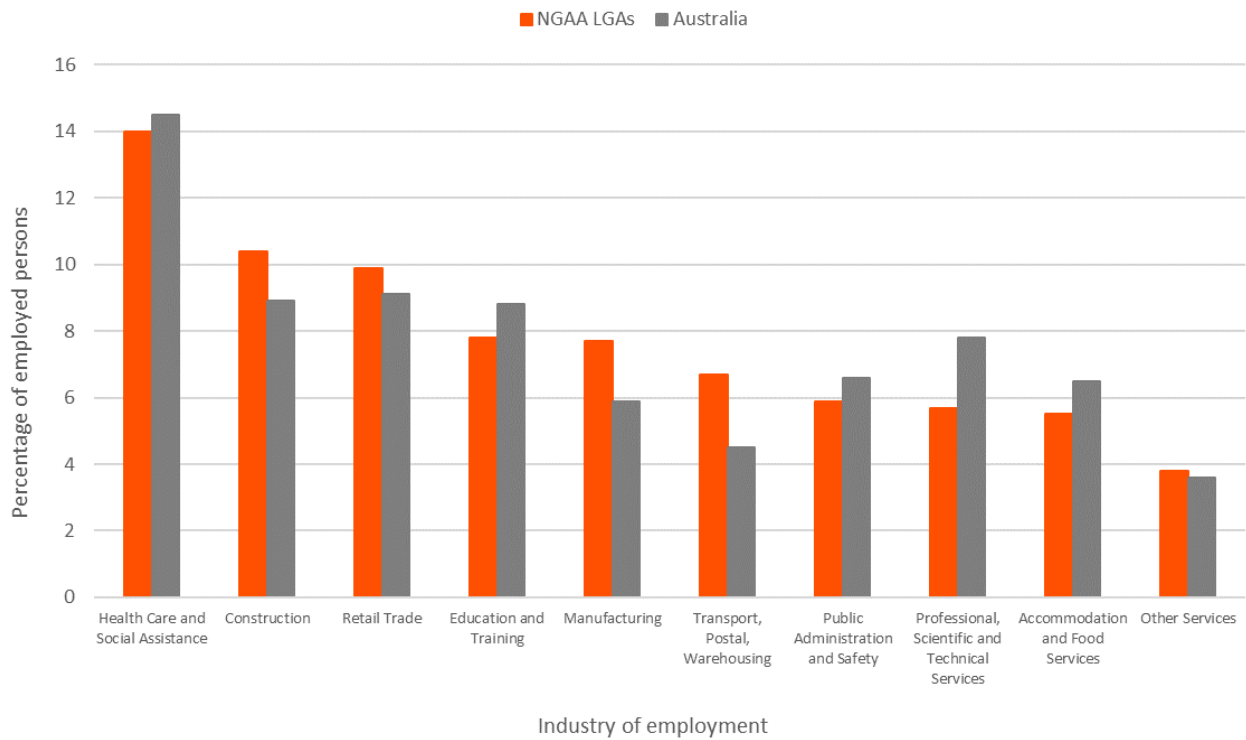
10.2 Industries of employment

Industry statistics identify the industry sectors where the residents work (which may be within the residing area or elsewhere). This will be influenced by the skill base and socio-economic status of the residents as well as the industries and employment opportunities present in the region.

The largest industry of employment in NGAA LGAs was “Healthcare and social assistance”, with 14% of employed residents working in this industry in 2021. Health care and social assistance was also the largest industry of employment in Australia (14.5%). Other significant industries of employment in NGAA LGAs were Construction (10.4%), Retail trade (9.9%), Education and training (7.8%) and Manufacturing (7.7%). The top ten industries of employment presented in this section account for almost 80% of all employed residents in NGAA LGAs.

Compared to Australia, a larger proportion of employed NGAA LGA residents were employed in Construction, Retail trade, Manufacturing and Wholesale trading. Conversely, a lower proportion of employed NGAA LGA residents were employed in Education and training, Public

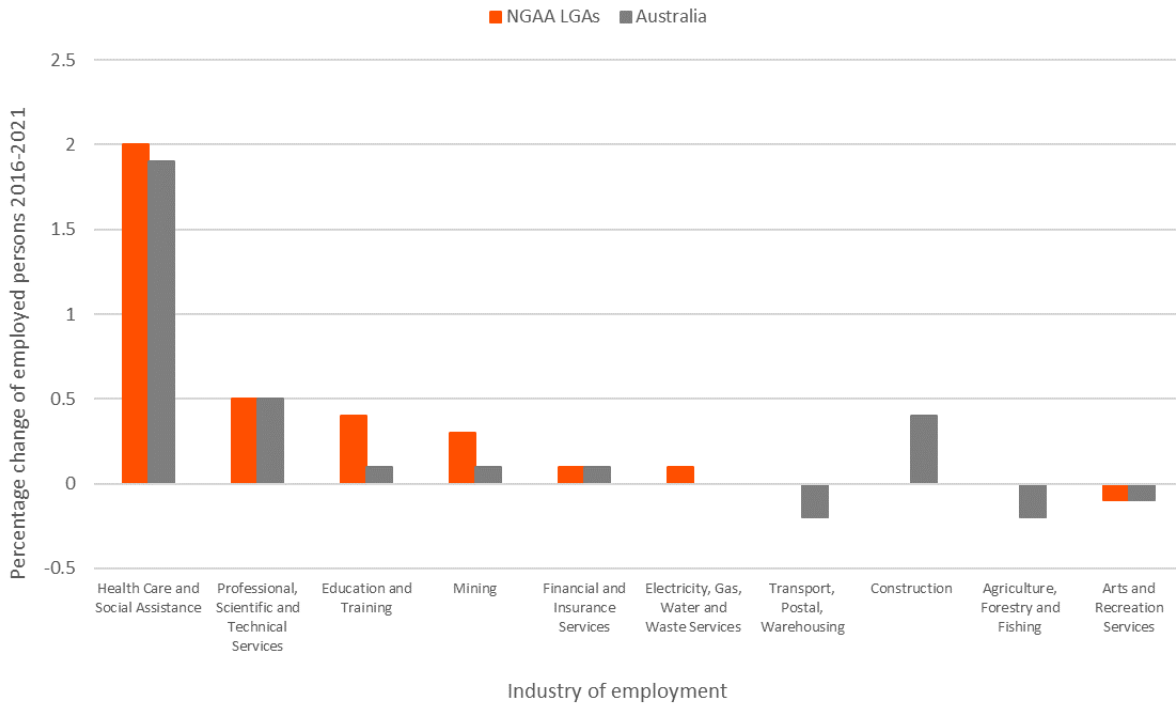
administration and safety, Professional, scientific and technical services, Accommodation and food services, Health care and social assistance, among others.



Top 10 Industries of employment for NGAA LGA employed residents, 2021 (source: ABS)

Since 2016, employment in Healthcare and social assistance increased most in NGAA LGAs, with a 2% increase of employed residents working in this industry. Australia recorded a similar increase (1.9%) in the same period. Other top 10 industries of employment recorded more modest increases or decreases, such as Professional, scientific and technical services increasing by 0.5% in both NGAA LGAs and Australia, and Education and training increasing by 0.4% in NGAA LGAs, compared to 0.1% in Australia.

Employment in the Mining industry increased by 0.3% in NGAA LGAs, compared to 0.1% in Australia. On the other hand, employment in the Construction industry has remained the same in NGAA LGAs since 2016, whereas Australia recorded a 0.4% increase in this industry.



Change in industries of employment for NGAA LGA employed residents, 2021 (source: ABS)

10.3 Occupations of employment

Occupation statistics quantify the occupations in which the residents work (which may be within the residing area or elsewhere). This will be influenced by the economic base and employment opportunities available in the area, education levels, and the working and social aspirations of the population. Occupation is a crucial measure for evaluating the socio-economic status and skill base of NGAA LGAs.

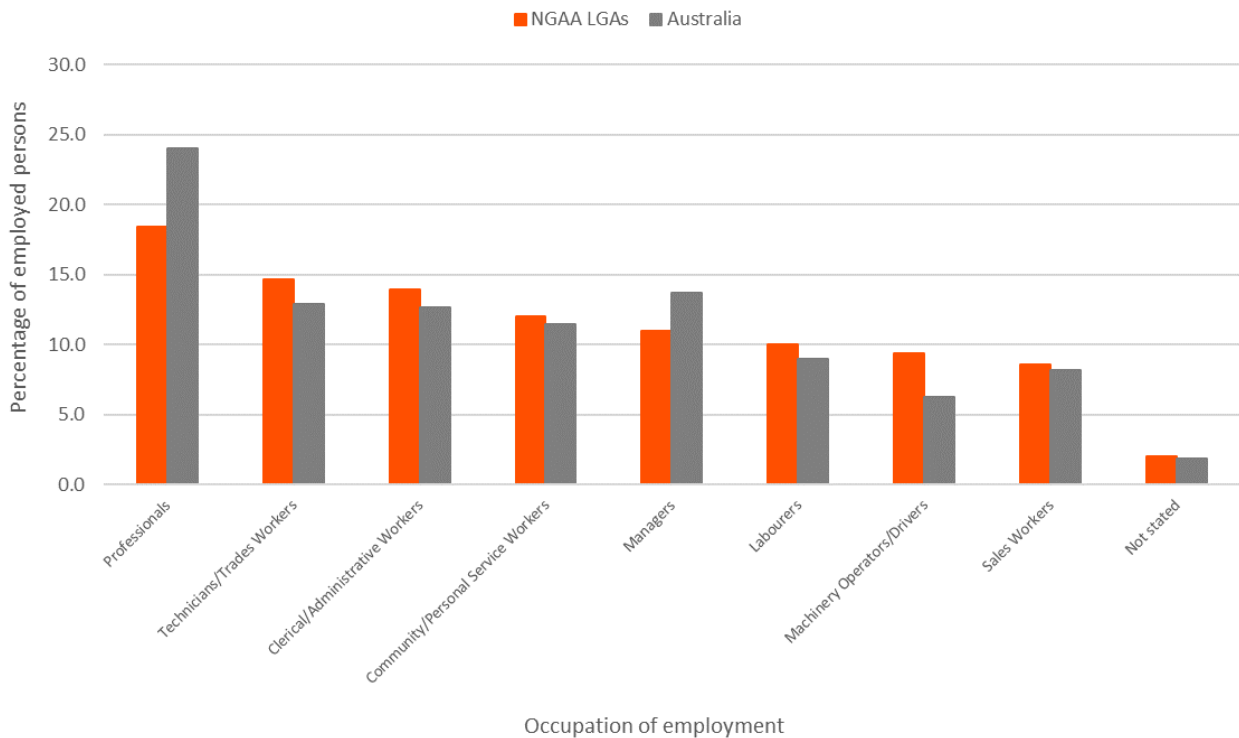
Professionals were the most common employment occupation in NGAA LGAs, with 18.4% of employed residents employed as professionals in 2021. This was a notably lower proportion than that of Professionals in Australia (24.0%). The second most common occupation in NGAA LGAs was Technicians/Trades Workers, with 14.7% of employed residents working in this industry, compared to a lower 12.9% in Australia. Clerical and Administrative Workers also made up a significant proportion of employed residents in NGAA LGAs (13.9%) as did “Community/Personal Service Workers (12%). For both professions, NGAA LGAs were slightly higher in proportion than in Australia.

Compared to Australia, NGAA LGAs had a higher proportion of employed residents with the following occupations:

- ▣ Technicians and Trades workers – 14.7% compared to 12.9% in Australia.
- ▣ Clerical and Administrative Workers – 13.9% compared to 12.7% in Australia.
- ▣ Community and Personal Service Workers – 12% compared to 11.5% in Australia.
- ▣ Labourers – 10% compared to 9% in Australia.
- ▣ Machinery Operators/Drivers – 9.4% compared to 6.3% in Australia.
- ▣ Sales Workers – 8.6% compared to 8.2% in Australia.
- ▣

NGAA LGAs only had a lower proportion of employed residents in these occupations compared to Australia:

- ▣ Professionals – 18.4% compared to 24% in Australia.
- ▣ Managers – 11% compared to 13.7% in Australia.



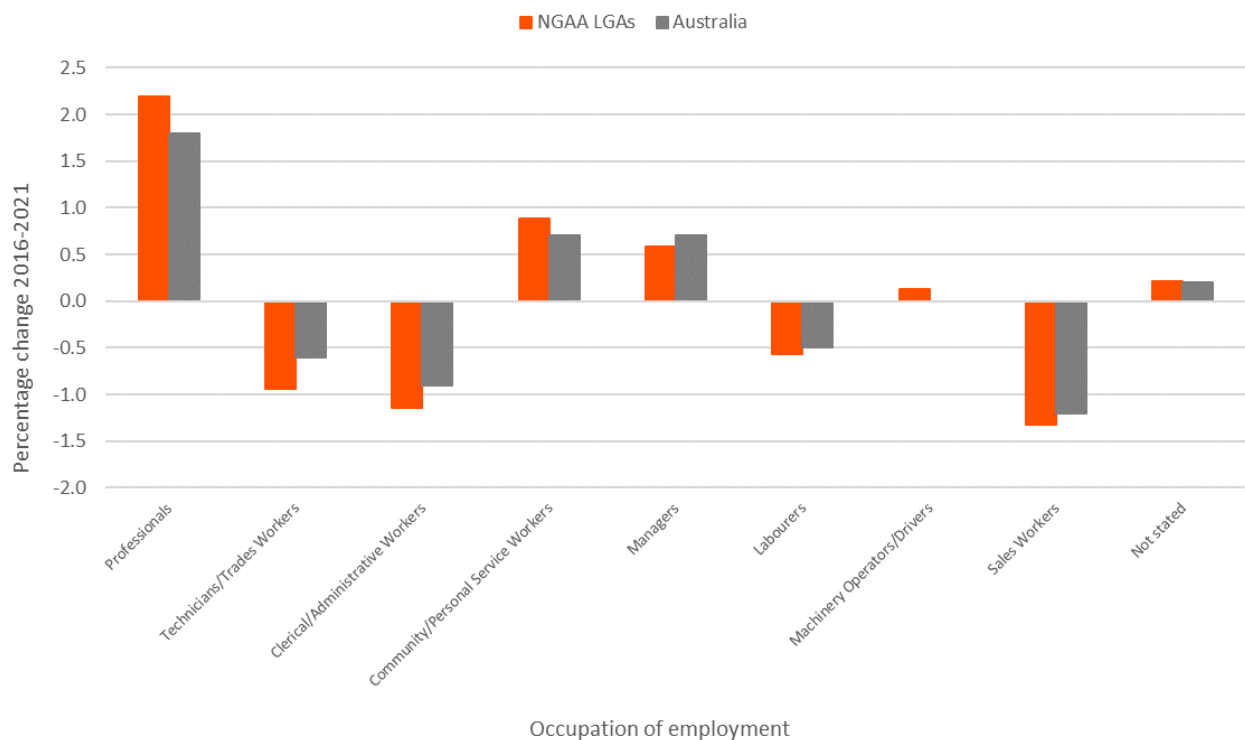
Occupations of employment in NGAA LGAs, 2021 (source: ABS)

Since 2016, the largest increase in occupations of employment in NGAA LGAs has been in Professionals, which increased by 2.2%, higher than the 1.8% recorded for the occupation in Australia. The proportion of employed residents working as “Community and Personal Service Workers” also increased by 0.9% between 2016 and 2021, slightly higher than in Australia (0.7% increase). As an occupation of employment, managers increased by 0.6% between 2016 and 2021, similar to Australia’s (0.7% increase).

On the other hand, occupations of employment that decreased most in percentage terms in NGAA LGAs were:

- ▣ Sales Workers (-1.3%, -1.2% in Australia),
- ▣ Clerical and Administrative Workers (-1.1%, -0.9% in Australia)
- ▣ Technicians and Trades Workers (-0.9%, -0.6% in Australia) and
- ▣ Labourers (-0.6%, -0.5% in Australia).

So NGAA LGAs have kept in trend with the occupation of employment trends also seen across Australia.

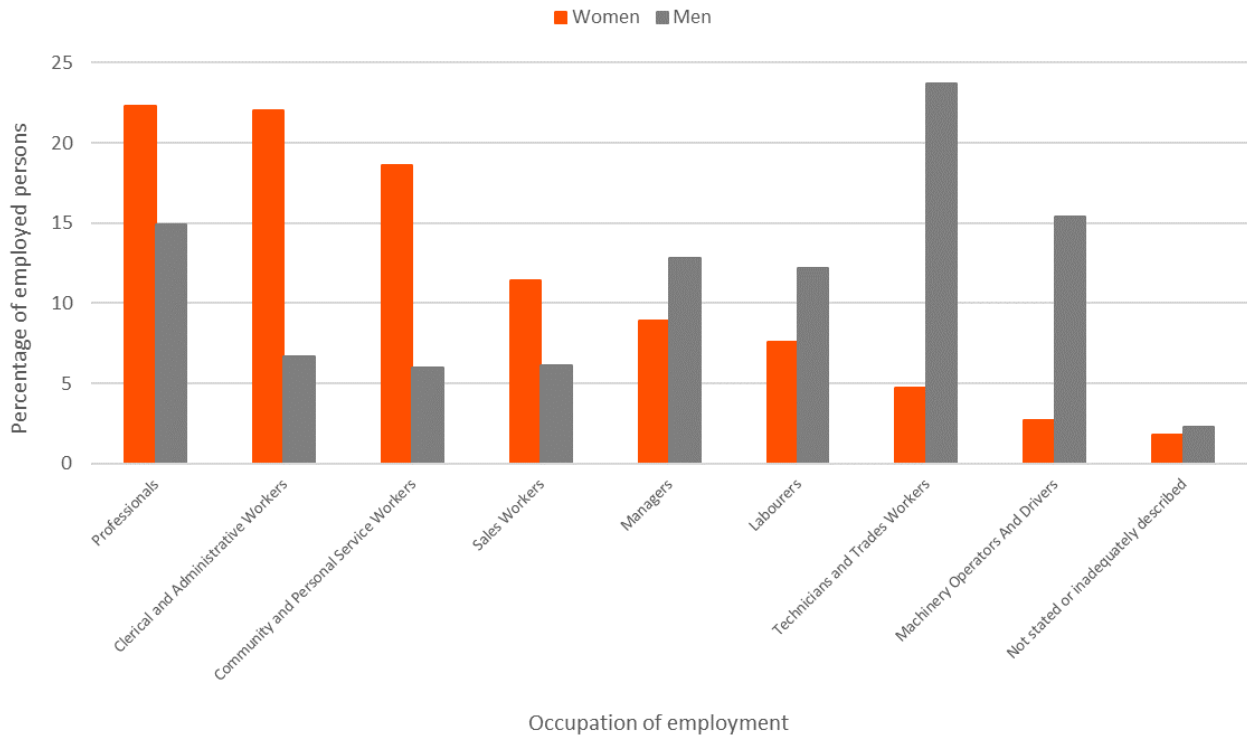


Change in occupations of employment, NGAA LGAs, 2016-2021 (source: ABS)

Occupations of employment also differ between women and men; these differences are also evident in NGAA LGAs.

Compared to employed men, employed women in NGAA LGAs work more predominantly as Professionals (7.4% higher than men), Clerical and Administrative Workers (15.3% higher than men), Community and Personal Service Workers (12.6% higher than men) and Sales Workers (5.3% higher than men).

Conversely, a higher proportion of employed men than women are employed as Machinery Operators and Drivers (12.7% higher than women), Technicians and Trades Workers (19% higher than women), Labourers (4.6% higher than women) and Managers (3.9% higher than women).



Occupations of employment for employed women and men residents of NGAA LGAs, 2021
(source: ABS)

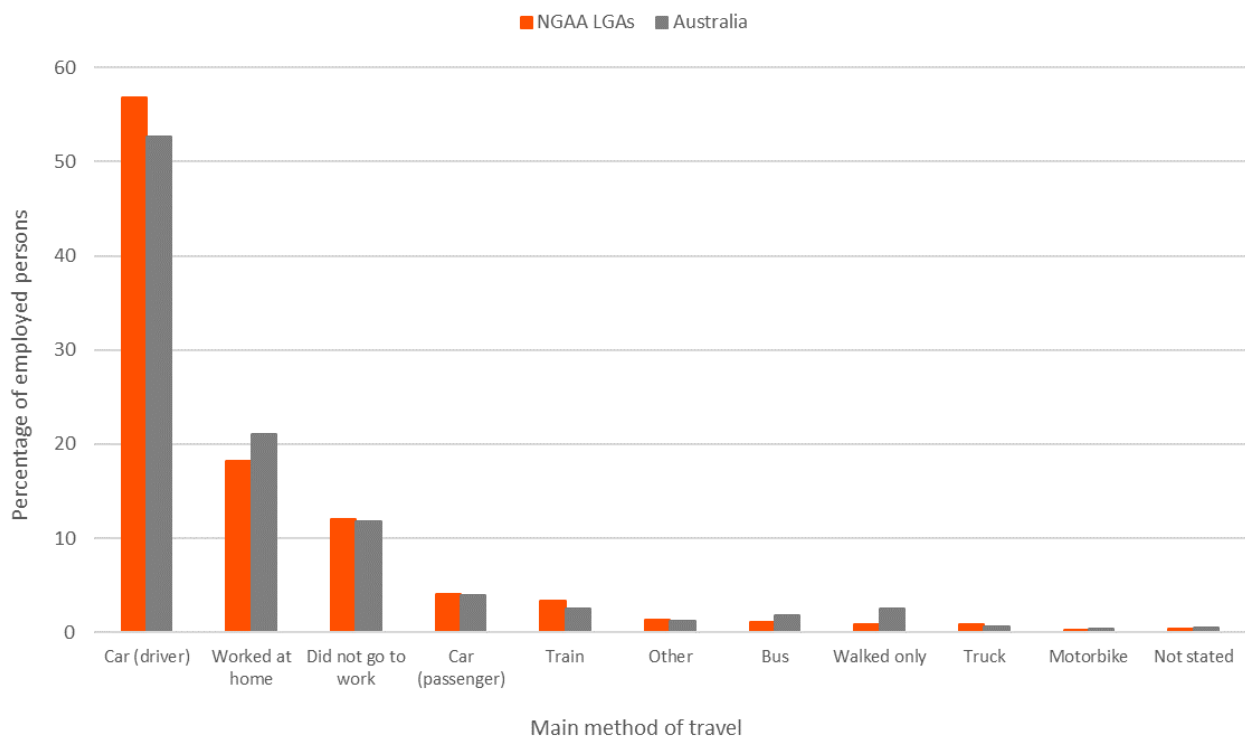
10.4 Method of travel to work

Commuting statistics reveal the main modes of transport residents get to work. There are several reasons why people use different modes of transport to get to work, including affordable and effective public transport options, the number of motor vehicles available within a household, and the distance travelled to work. Commuting data is very useful in transport planning as it informs decision-makers about the availability, effectiveness and utilisation of local transport options.

- ▣ Most employed residents in NGAA LGAs drove a car to work in 2021 (56.8%), a proportion higher than in Australia (52.7%). A significant proportion also worked from home (18.2%) compared to 21% in Australia. This method of work travel was considerably higher in 2021 than in 2016 due to Covid-19 and government-imposed restrictions on movement and places of work. However, a similar proportion of NGAA

LGA and Australian residents did not go to work on Census Day (12% compared to 11.8% in Australia).

Smaller proportions of methods of travel to work were for being a passenger in a car (4.1% compared to 3.9% in Australia) and train, which was higher in NGAA LGAs (3.4%) than Australia (2.5%) and is related to accessibility and availability of such transport infrastructure. A lower proportion of NGAA LGA residents travelled by bus (1.1% compared to 1.8%), and a significantly lower proportion walked to work (0.9% compared to 2.5% in Australia).

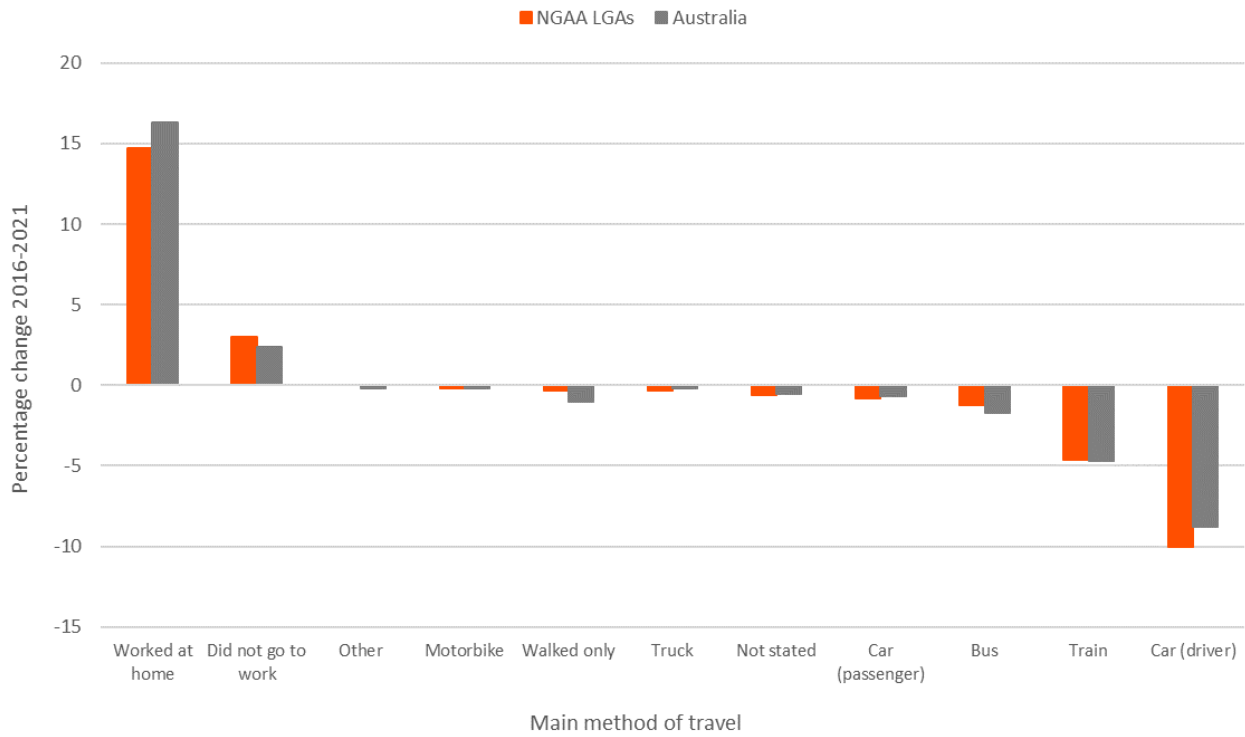


Top 10 methods of travel to work for employed NGAA LGA residents, 2021 (source: ABS)

Since 2016, the most significant increase in the main method of travel to work was in “worked from home”, as expected given Covid-19 restrictions on movement, commuting to work and increased capabilities to work from home. Working from home increased by 14.7% in NGAA LGAs and 16.3% in Australia. The proportion of employed residents who did not work also increased by 3% in NGAA LGAs and 2.4% in Australia.

Several methods of travel, such as motorbikes, walking, truck or car as a passenger, did not change significantly since 2016. However, modes of transport such as buses decreased by 1.2% in NGAA LGAs and 1.7% in Australia. Train, as a primary method of travel, decreased by 4.6% in NGAA LGAs and 4.7% in Australia, another impact of Covid-19 and a likely aversion of people to not take public transport, coupled with the increase of working from

home. Lastly, driving a car to work was almost the inverse of working from home, especially in NGAA LGAs, where driving a car to work is typically the main mode of travel to work. Driving a car to work decreased by 10% in NGAA LGAs, compared to 8.8% in Australia.



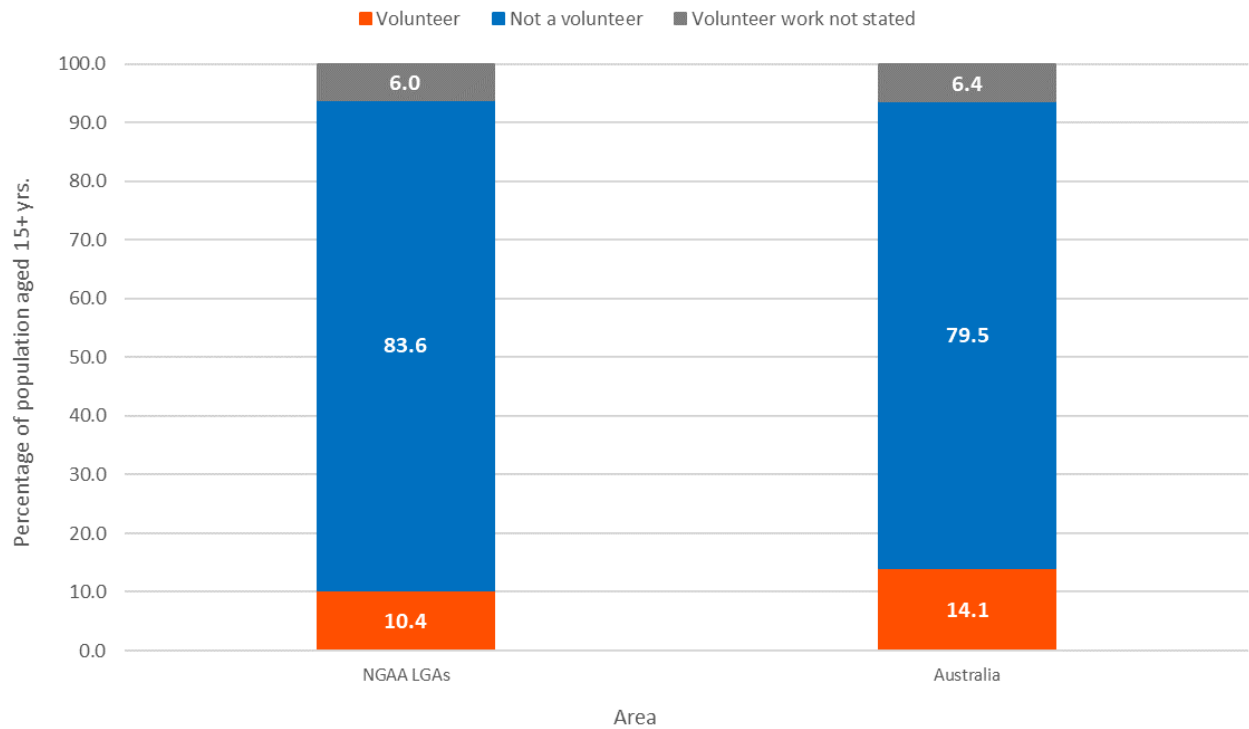
Change in methods of travel to work for employed NGAA LGA residents, 2016-2021 (source: ABS)

11. Unpaid work

11.1 Volunteer work

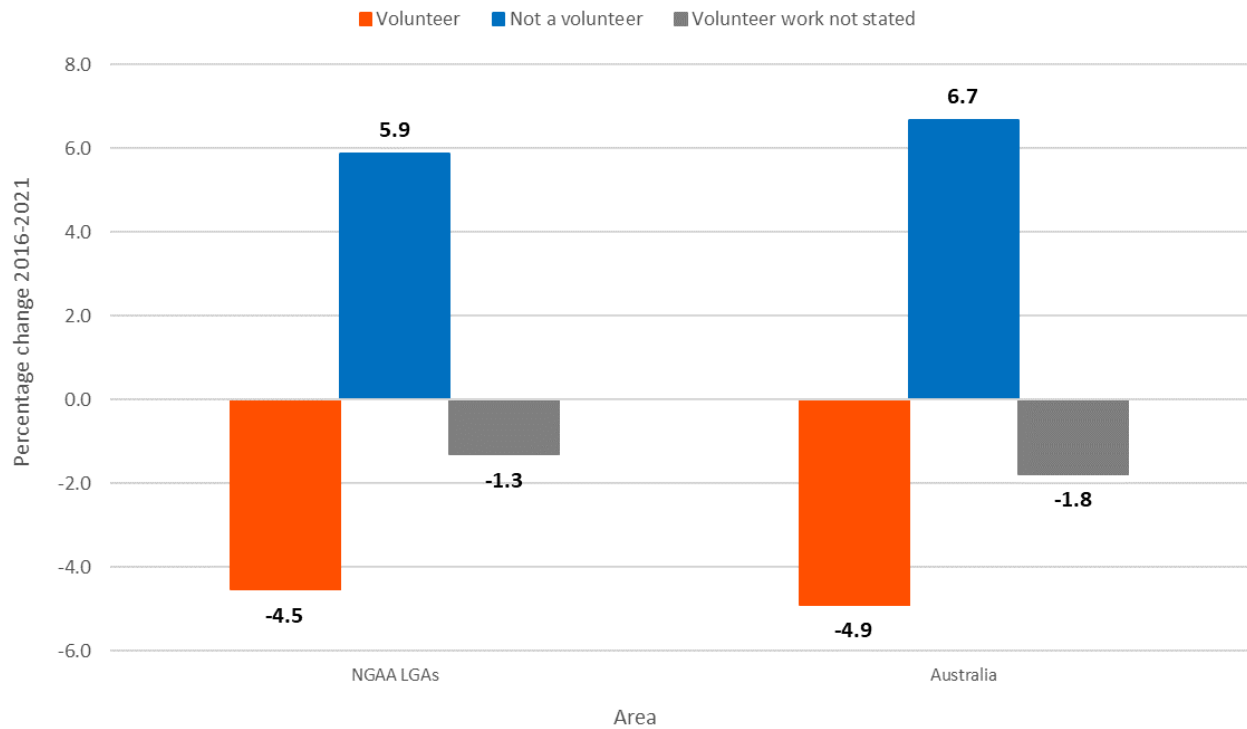
The voluntary work sector is an important part of Australia's economy. The level of volunteering can indicate the community's cohesiveness and how readily individuals can contribute to that community. Factors impacting the level of volunteering in NGAA LGAs include the population's age structure, proficiency in English, Income and Education levels.

In 2021, 10.4% of the population aged 15 years and older in NGAA LGAs volunteered through an organisation or group. This proportion was lower than in Australia, where 14.1% of residents aged 15 and older volunteered through an organisation or group.



Volunteer status, NGAA LGAs, 2021 (source: ABS)

Since 2016, volunteering has decreased across Australia. In NGAA LGAs, there were 94,372 fewer volunteers in 2021 than 2016, a 4.5% decrease in the volunteering rate. Australia's volunteering rate also decreased by 4.9% since 2016. It is thought that Covid-19 restrictions across Australia on movement, gathering, and operating organisations such as volunteer groups were partly responsible for the decline in volunteering rates in both NGAA LGAs and across Australia.

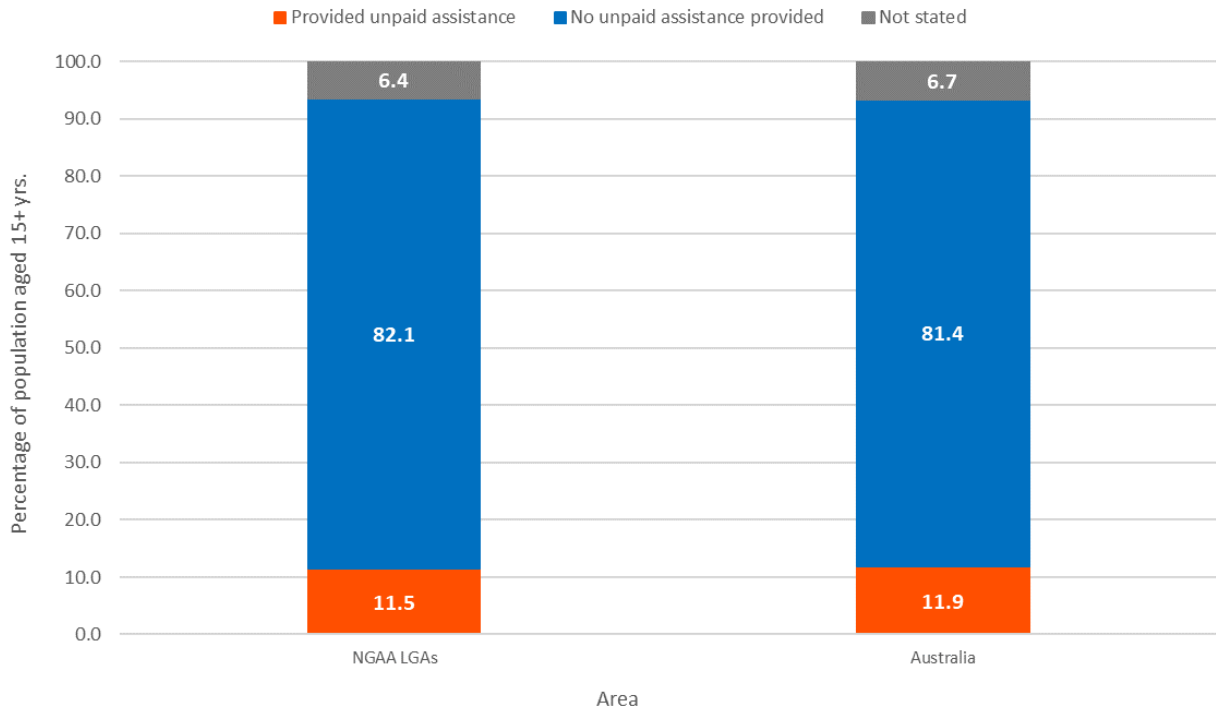


Change in volunteer status, NGAA LGAs, 2016-2021 (source: ABS)

11.2 Unpaid care

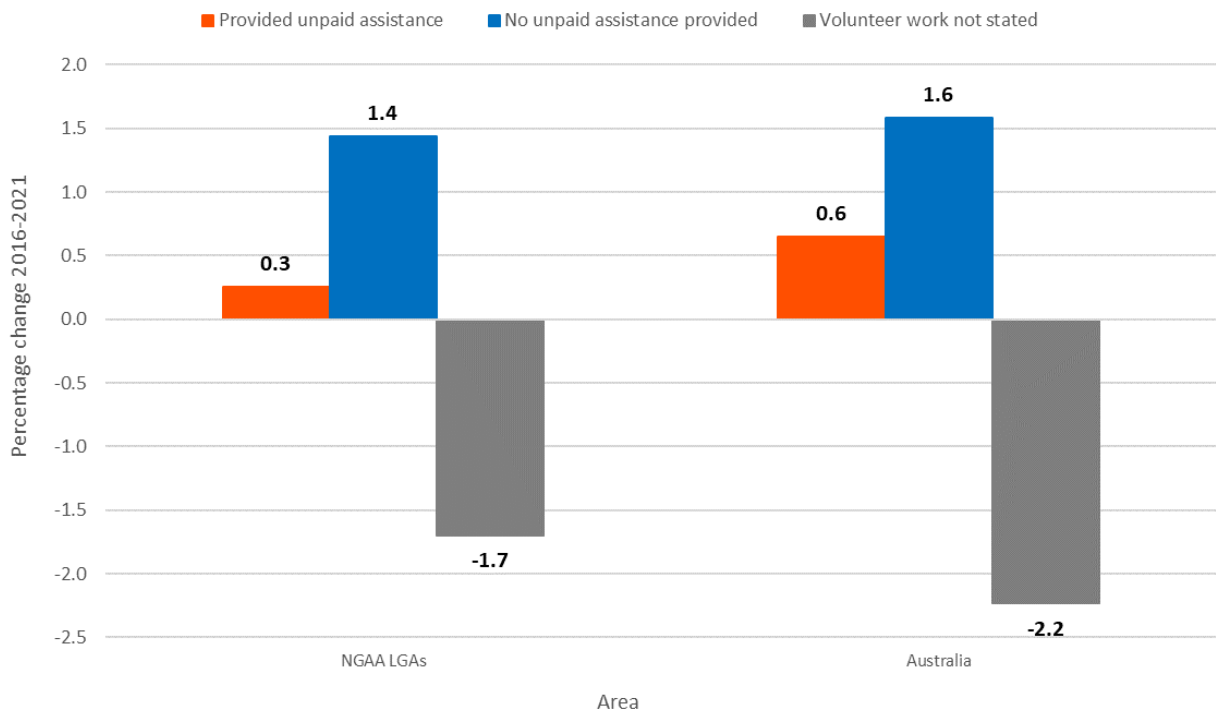
The proportion of people providing unpaid care for the aged and disabled in NGAA LGAs can be an essential indicator of the demand for aged care services and facilities by local and State governments. An increasing proportion of carers among the population may indicate inadequate aged care provision, the need for in-home support, or support for the carers themselves. The level of care provided by individuals is likely to be affected by household income, age structure and the ethnic make-up of the community, as well as the sense of community cohesiveness.

Unpaid care rates are slightly lower in NGAA LGAs than in Australia. In 2021, 11.5% of NGAA LGA residents aged 15 years or older provided unpaid assistance to a person with a disability, long-term illness or old age, a rate lower than 11.9% in Australia.



Assistance to a person with a disability, long-term illness, or old age, NGAA LGAs, 2021
(source: ABS)

Since 2016, the proportion of residents aged 15 years or older in NGAA LGAs has increased modestly by 0.3%. In the same period, the provision of unpaid assistance to a person with a disability, long-term illness, or old age in Australia also increased by 0.6%.

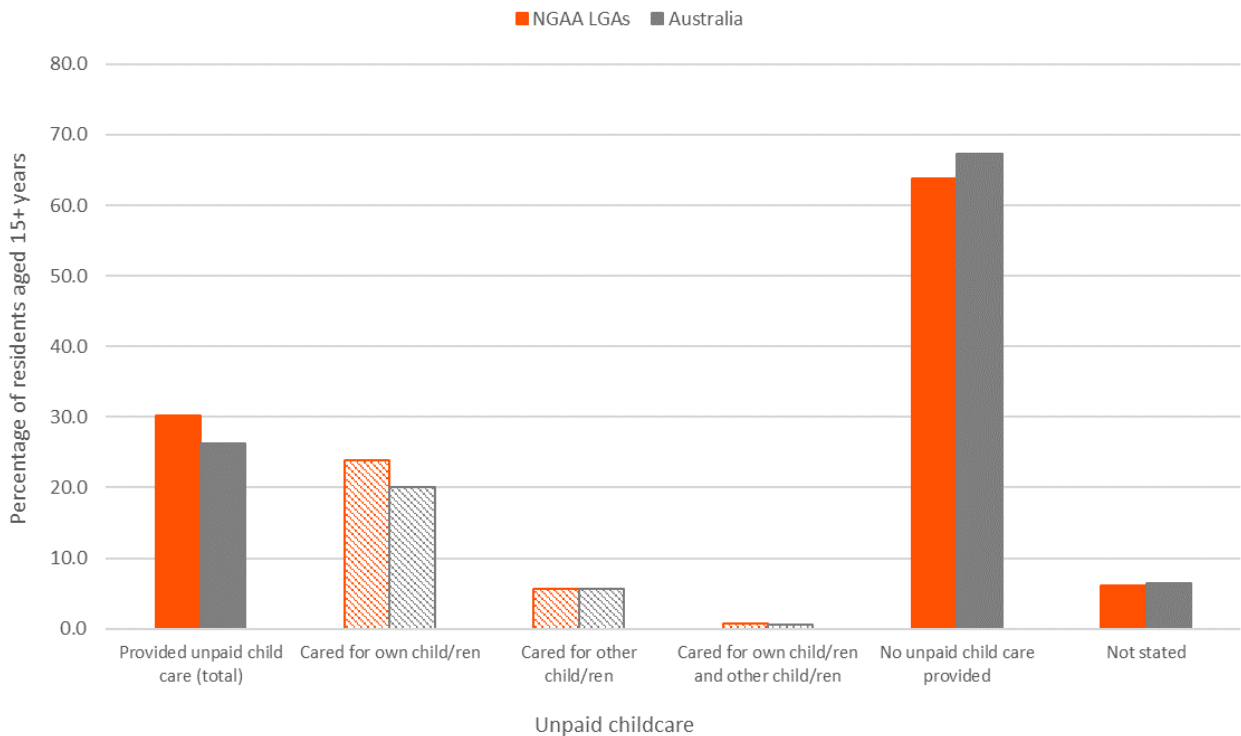


Change in provision of unpaid care, NGAA LGAs, 2016-2021 (source: ABS)

11.3 Unpaid childcare

Many different factors determine the role of unpaid childcare in NGAA LGAs. For example, areas with high levels of unpaid childcare may have a dominance of single-income families with one significant earner, or there could be a lack of provision of paid childcare in the area. The level to which people care for others' children can also indicate the role of extended family (e.g. grandparents caring for grandchildren, family day care).

A higher proportion of NGAA LGA residents aged 15 years or older provided unpaid childcare than Australia. In 2021, 30.2% of residents aged 15 years or older in NGAA LGAs provided unpaid childcare, compared to 26.3% of Australians overall. Most of this childcare was for their own children, with only 5.6% of childcare being for others' children.

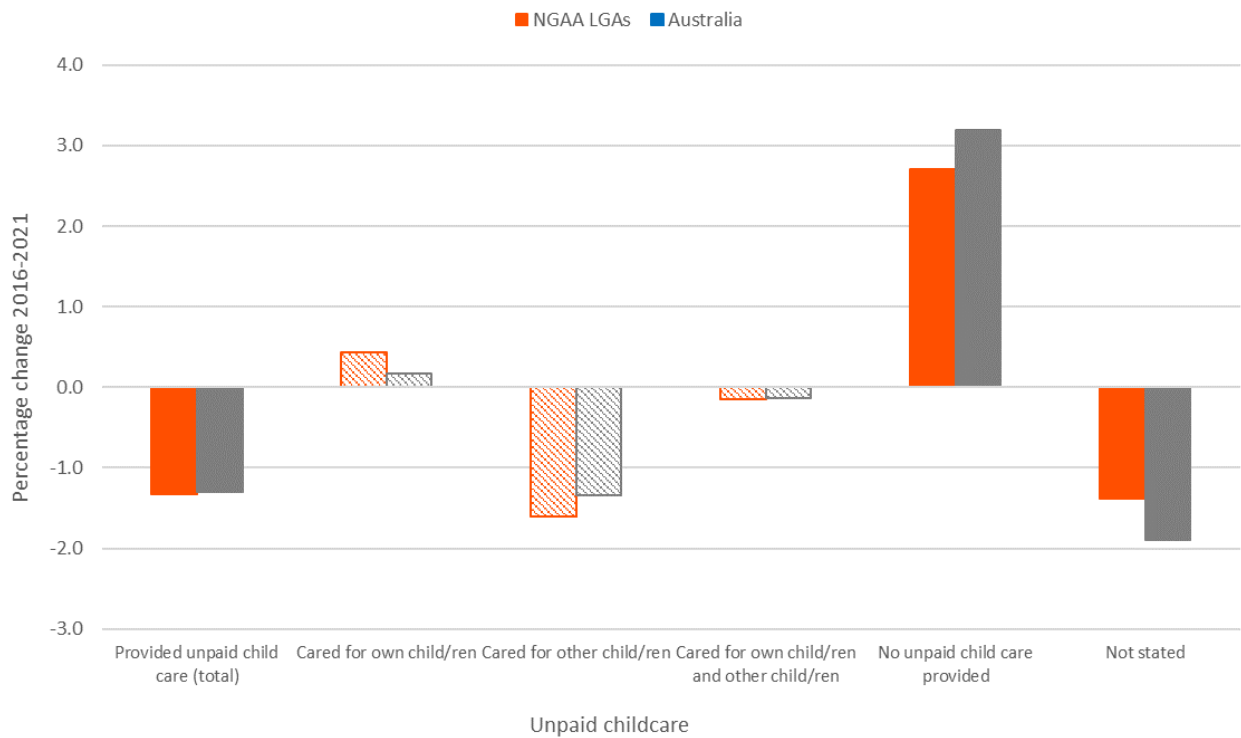


Provision of unpaid childcare in NGAA LGAs, 2021 (source: ABS)

Since 2016, the provision of unpaid childcare has decreased in both NGAA LGAs and Australia. In NGAA LGAs, childcare provision decreased by 1.3%, which was the same as in Australia. Within this category, however, the provision of childcare for their own children increased by 0.4% in NGAA LGAs and 0.2% in Australia. The sub-category which decreased the most and drove the overall decrease in unpaid childcare is the provision of unpaid childcare to other children. In NGAA LGAs, the decrease was 1.6%, and in Australia, 1.3%.

These decreases could be related to Covid-19 and the inability to provide unpaid childcare to other children as households were restricted from interacting or visiting one another for long periods during 2020 and 2021 in many parts of Australia, especially the eastern States such as Victoria and New South Wales.

Unpaid childcare statistics usually vary between women and men, which is no different in NGAA LGAs. In 2021, 34% of women and 26% of men provided unpaid childcare. Over time, the provision of unpaid childcare decreased for men in NGAA LGAs, by 0.7%, whereas unpaid childcare decreased by 2%, since 2016.



Change in provision of unpaid childcare, NGAA LGAs, 2016-2021 (source: ABS)

12. Household composition

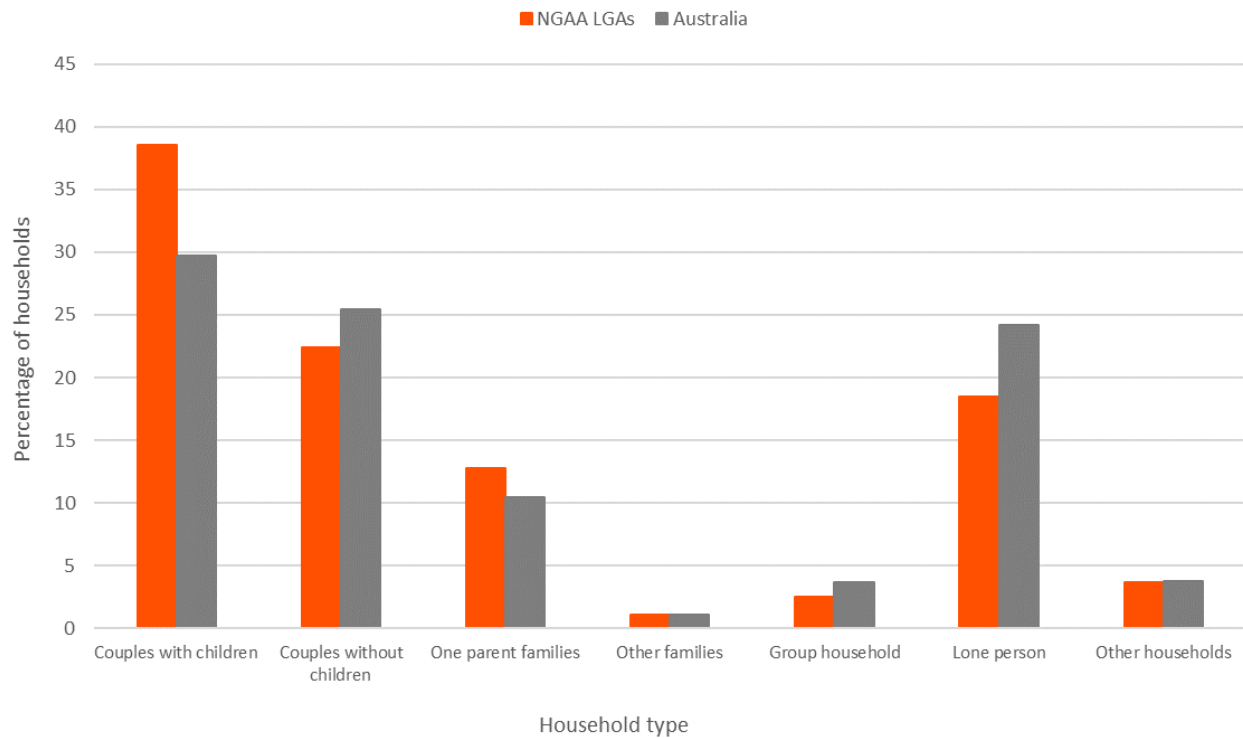
Household and family structure is one of the most important demographic indicators. It reveals the area's residential role and function, era of settlement. It provides key insights into the level of demand for services and facilities as most are related to age and household types. NGAA LGAs are primarily located in growth areas, which have a role and function of housing families and provide larger housing to accommodate this housing market segment.

Households in NGAA LGAs are predominantly families, where couples with children make up 38.5% of all households, a proportion higher than in Australia overall (29.7%). The second largest household type is couples without children (22.4%), a proportion slightly lower than in Australia (25.4%). Couples without children can include younger and older couples without children, representing very different cohorts of the population. Younger couples without children usually represent younger couples who will in the future start a family. Older couples without children usually represent empty nesters, where children left home.

In 2021, older couples without children (aged 65 years and older) made up a more significant proportion of couples without children (8.4% of 22.4%), followed by middle-aged couples without children (45-64 years) who made up 7.1% of households and then young couples without children (15-44 years old), who represented 6.9% of households. Since 2016, the proportion of young couples without children remained the same; the proportion of middle-aged couples without children decreased by 0.8% and older couples without children increased by 0.4%.

Other dominant household types in NGAA LGAs are lone-person households, which make up 18.5% of all households, a proportion lower than in Australia (24.2%). Lone-person households are also primarily made up of older lone-person households in NGAA LGAs and recording an increase over time, reflective of the older overall age structure of NGAA LGAs compared to 2016.

The proportion of one-parent families is higher in NGAA LGAs than Australia overall, 12.8% compared to 10.5%.

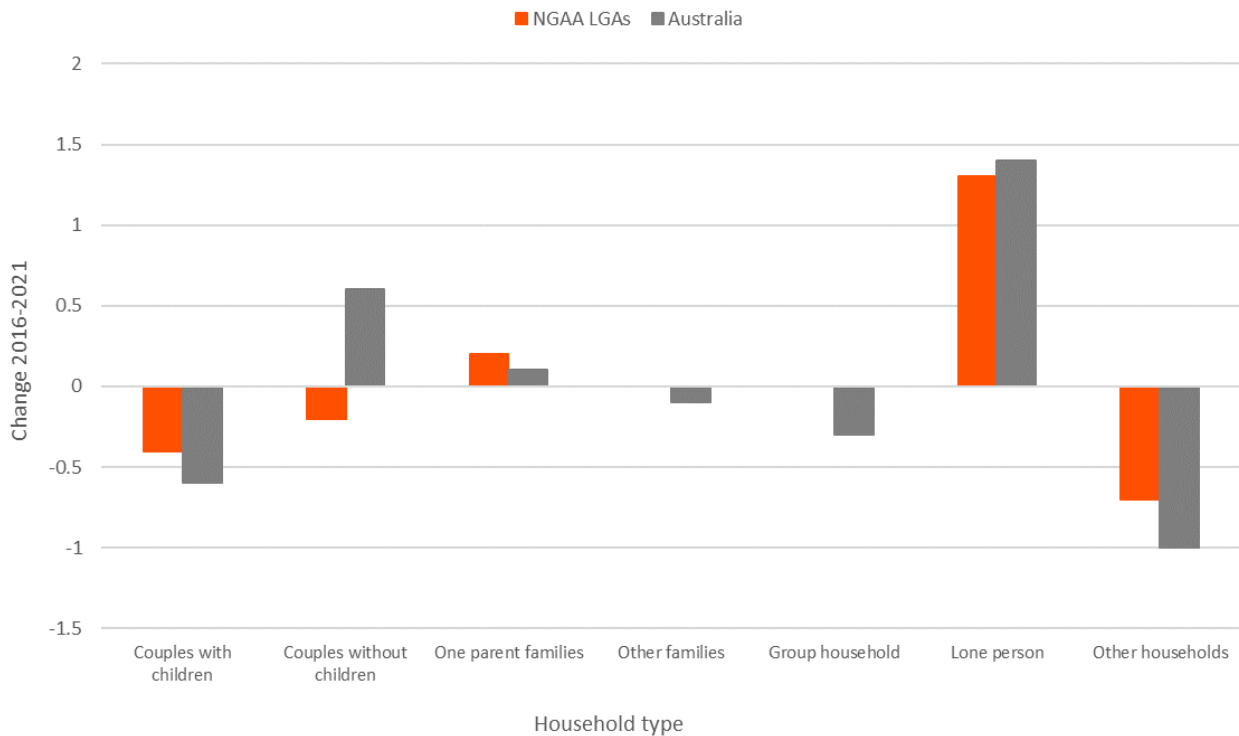


Household composition of NGAA LGAs, 2021 (source: ABS)

Compared to 2016, the proportion of households in NGAA LGAs, couples with children, decreased by 0.4%. In Australia, a decrease was also recorded, at 0.6%. Couples without children also decreased in proportion in NGAA LGAs, with a 0.2% decline since 2016, a trend different to that of Australia where the proportion of couples without children increased by 0.6%.

The most significant increase in NGAA LGAs has been for lone-person households, which has increased by 1.3% since 2016. However, of those lone-person households, older lone-person households increased the most (by 0.7%), signifying ageing in place of some older residents since 2016.

One-parent households slightly increased in proportion in NGAA LGAs since 2016 (0.2%), and the proportion of other families (multigenerational families) or group households remained the same. In both NGAA LGAs and Australia, the proportion of other non-classifiable households decreased between 2016 and 2021, a likely outcome of increased online completion. These households consist mainly of dwellings the Census Field Officer believes were occupied on Census night but no form was returned.



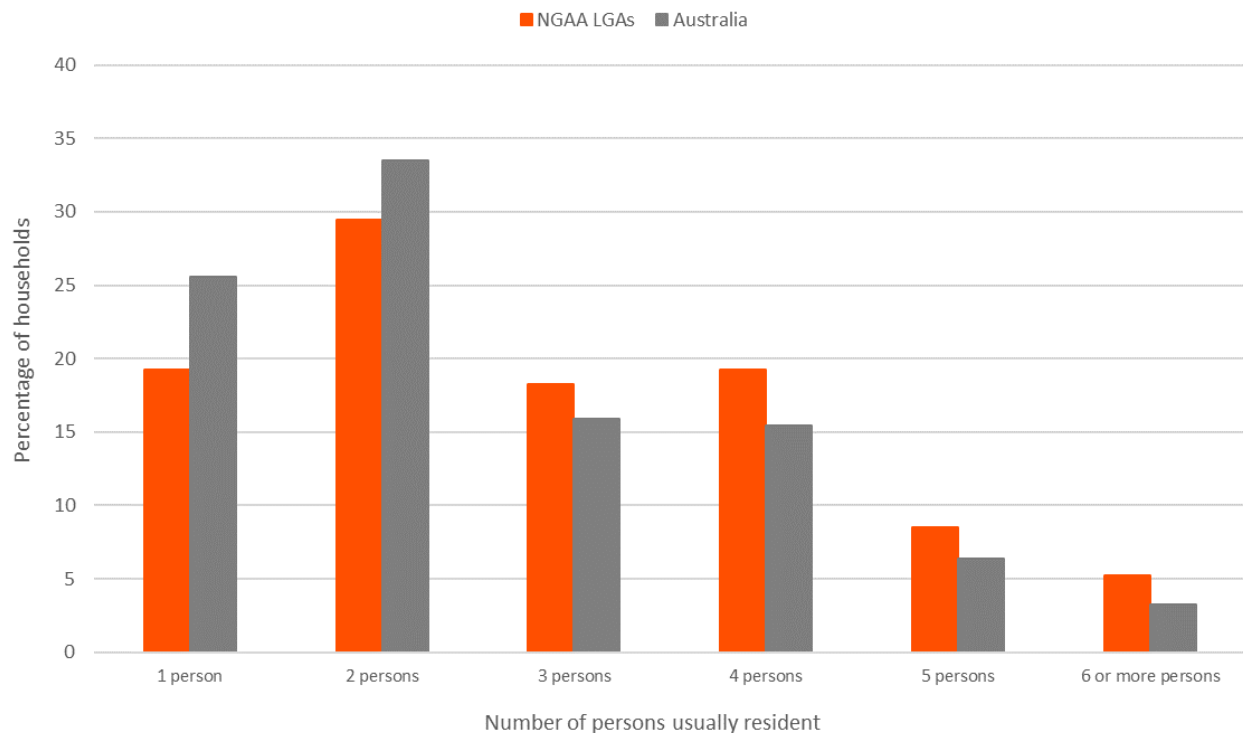
Change in household composition of NGAA LGAs, 2021 (source: ABS)

13. Average household size

The size of households in general, follows the life cycle of families. Households are usually small at the stage of relationship formation (early marriage), and then increase in size with the advent of children. They later reduce in size again as these children reach adulthood and leave home. Household size can also be influenced by a lack (or abundance) of affordable housing. Overseas migrants and indigenous persons often have a tradition of living with extended family members, significantly affecting household size.

NGAA LGA household sizes have been larger than those in the rest of Australia due to the role and function of NGAA LGAs, which is to provide housing to families. However, within NGAA LGAs, suburban lifecycles play a role, and as some growth areas, LGAs reach capacity where no new housing is added to the local stock, and the process of ageing in place begins. Young families become mature and eventually empty nest households when children leave home. At these critical suburban lifecycle milestones, average household size decreases. Because many growth areas are developed rapidly and tend to house a similar population, significant changes in suburban lifecycles affect a broader population segment. They can result in more significant average household size declines than in other LGAs, where there is more of a mix of households and ages of residents.

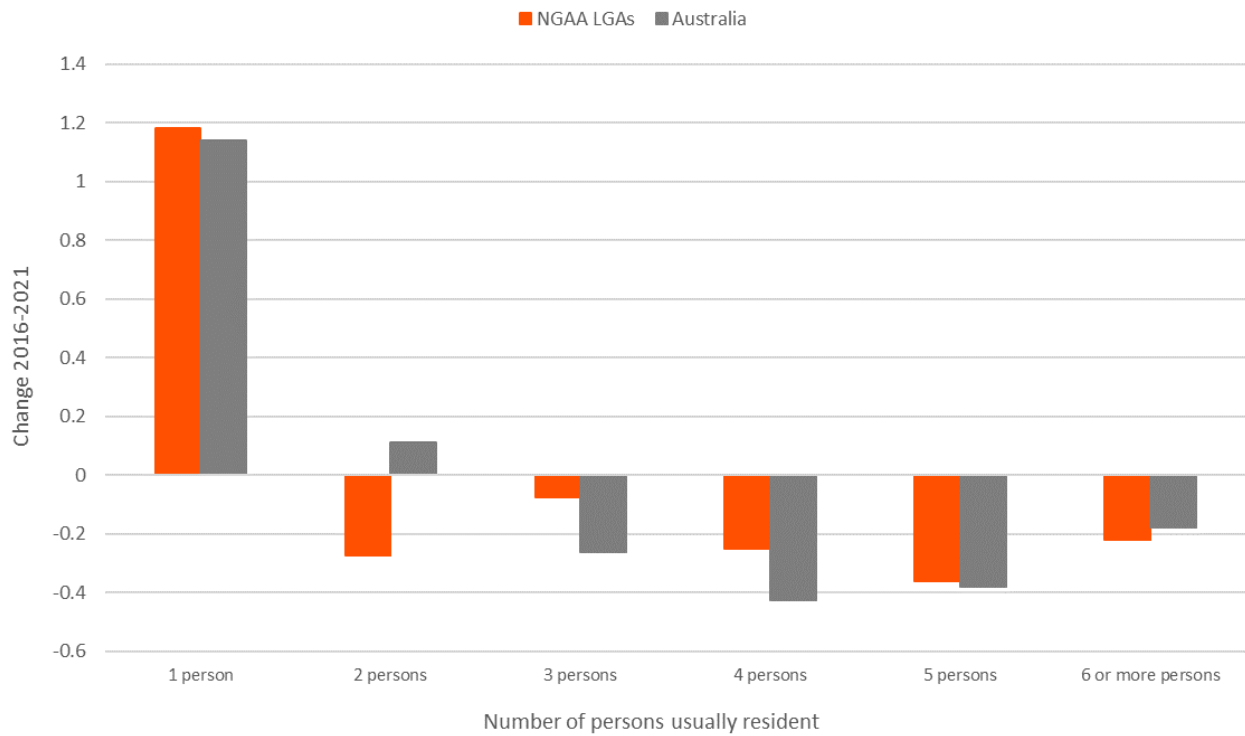
NGAA LGAs have a lower proportion of 1 and 2-person households than in Australia, and a higher proportion of households with 3 or more residents. In 2021, 49% of households had 1 or 2 persons usually resident, compared to 59% of Australia. On the other hand, 51% of households have 3 or more persons usually resident, compared to 41% in Australia.



Number of residents usually resident in households, NGAA LGAs, 2021 (source: ABS)

Since 2016, the proportion of 1-person households increased most in NGAA LGAs and Australia. In NGAA LGAs, the increase was 1.2% and 1.1% in Australia. This increase could be related to the overall ageing of the population in both NGAA LGAs and Australia, as well as perhaps more design-driven influences, such as increases in the proportion of high-density dwellings, which tend to house lower numbers of people.

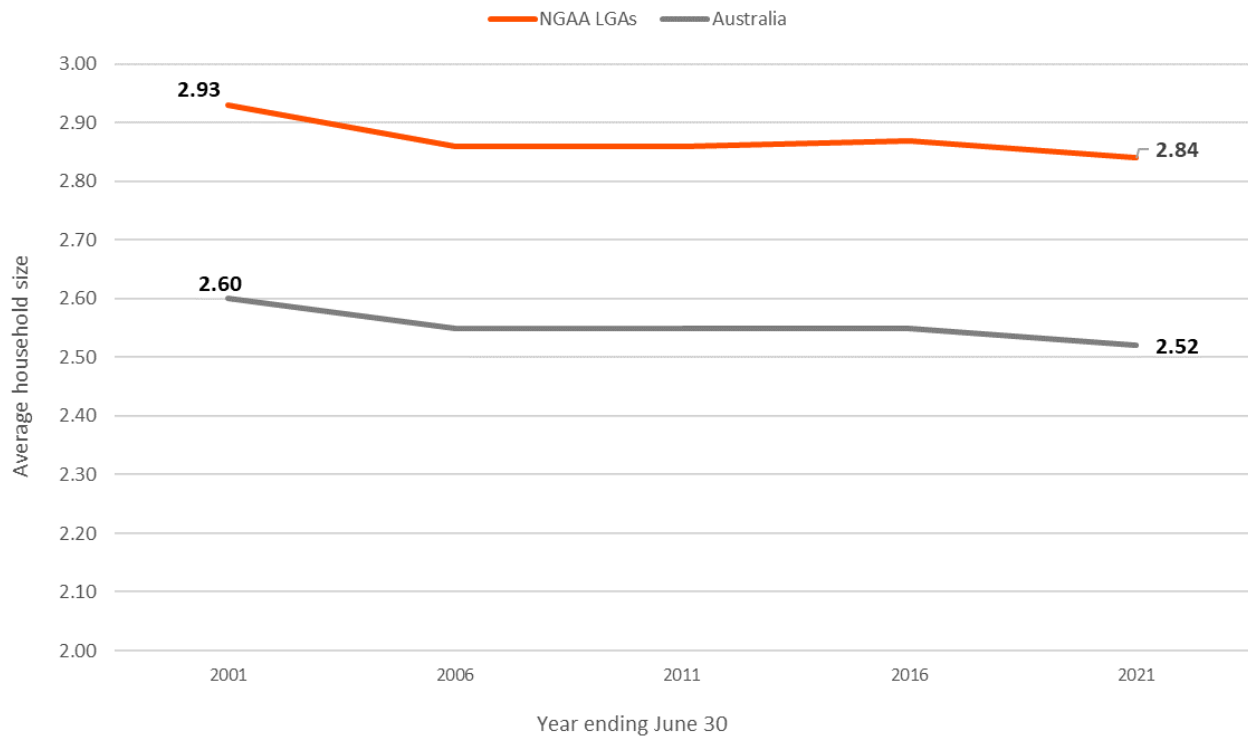
The proportions of all other household sizes decreased slightly in NGAA LGAs and in some cases, Australia too.



Change in number of residents usually resident in households, NGAA LGAs, 2016 - 2021
(source: ABS)

The average household size has been consistently higher in NGAA LGAs than in Australia for at least 20 years. However, in 2001, some of the LGAs included in the NGAA LGAs outlined earlier in this report were not developing as growth areas yet.

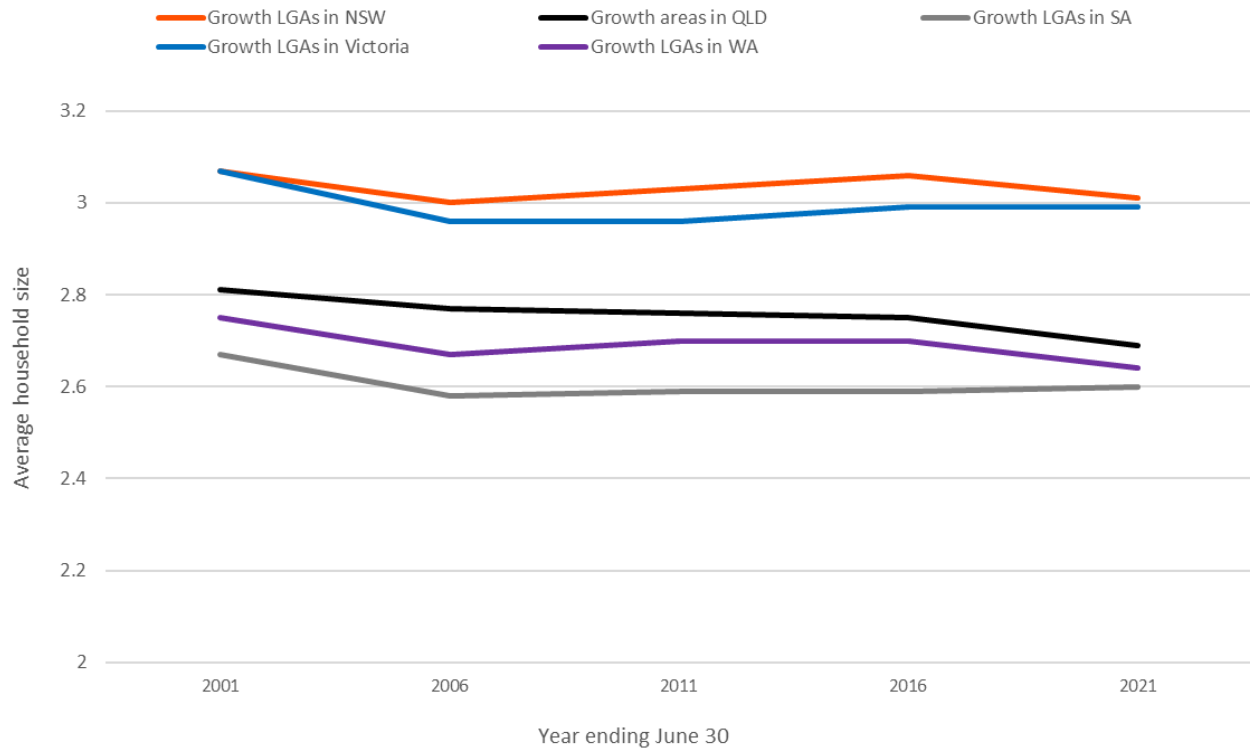
In 2021, the average household size of NGAA LGAs was 2.84 persons per household, higher than in Australia (2.52). The average household size of NGAA LGAs has been decreasing since 2001 at a rate like that of Australia but is still notably higher than in Australia as a whole.



Average household size in NGAA LGAs, 2001-2021 (source: ABS)

Within NGAA LGAs, growth areas in NSW had the largest average household size in 2021 (3.01 persons per household) and have consistently been the highest average household size (compared to 2001). Larger average household sizes were also in Victorian growth areas (2.99). Conversely, growth areas in States such as South Australia had lower average household sizes (2.64), with Western Australia close by at 2.64 persons per household in 2021.

Different household sizes in other States can reflect the stage of development that growth areas are in, with mature areas likely to be in a household size decline phase compared to newer areas with a higher proportion of families. The size of the housing product delivered is also a driver of average household size, so areas where 4- or 5-bedroom dwellings are more common than 2 or 3-bedroom dwellings, will have larger average household sizes.

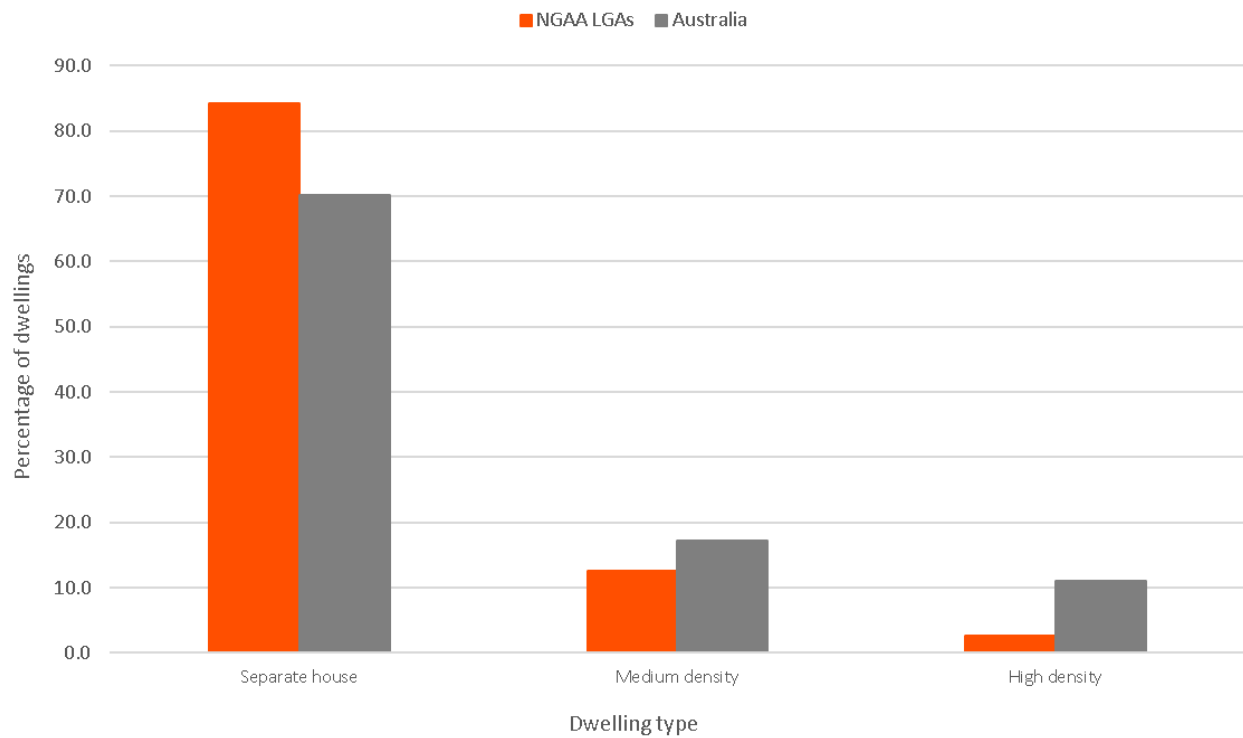


Average household size in NGAA LGAs, by State/Territory, 2001-2021 (source: ABS)

14. Dwelling types

Dwelling types determine the settlement patterns and household composition of an area. NGAA LGAs are traditionally growth areas designed to provide housing for families. Most housing in NGAA LGAs has been developed in greenfield areas, predominantly lower density, low-rise, separate house-dominated suburbs. Developers, planners and structure plans aim for a mix of housing stock to allow a variety of housing options for different types of residents, but usually – greenfield areas are primarily composed of stand-alone, separate houses.

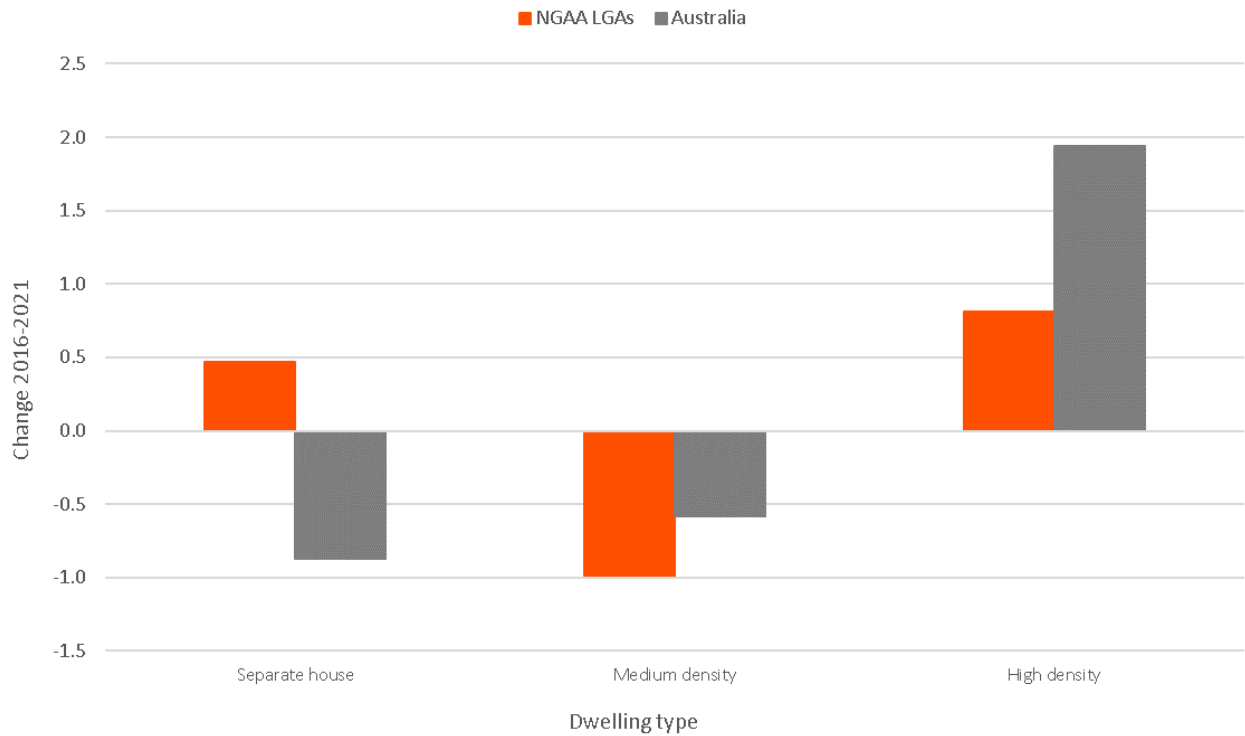
Most dwellings in NGAA LGAs are separate houses. In 2021, 84.3% of all dwellings were separate houses, a higher proportion than in Australia (70.3%). Only 12.5% of NGAA LGAs were medium-density dwellings, a proportion lower than in Australia (17.3%). Medium-density dwellings include all semi-detached, row, terrace, townhouses and villa units, flats and apartments in blocks of 1 or 2 storeys, and flats attached to houses. Only 2.7% of all dwellings in NGAA LGAs were high-density dwellings, that is – flats and apartments in three-storey buildings or higher.



Dwelling types in NGAA LGAs, 2021 (source: ABS)

Although separate houses are the dominant dwelling type in NGAA LGAs, since 2016, high-density dwellings have experienced the largest percentage increase. Between 2016 and 2021, the proportion of high-density dwellings in NGAA LGAs increased by 0.8%. In Australia, high-density dwellings increased by an even more considerable margin, 1.9%.

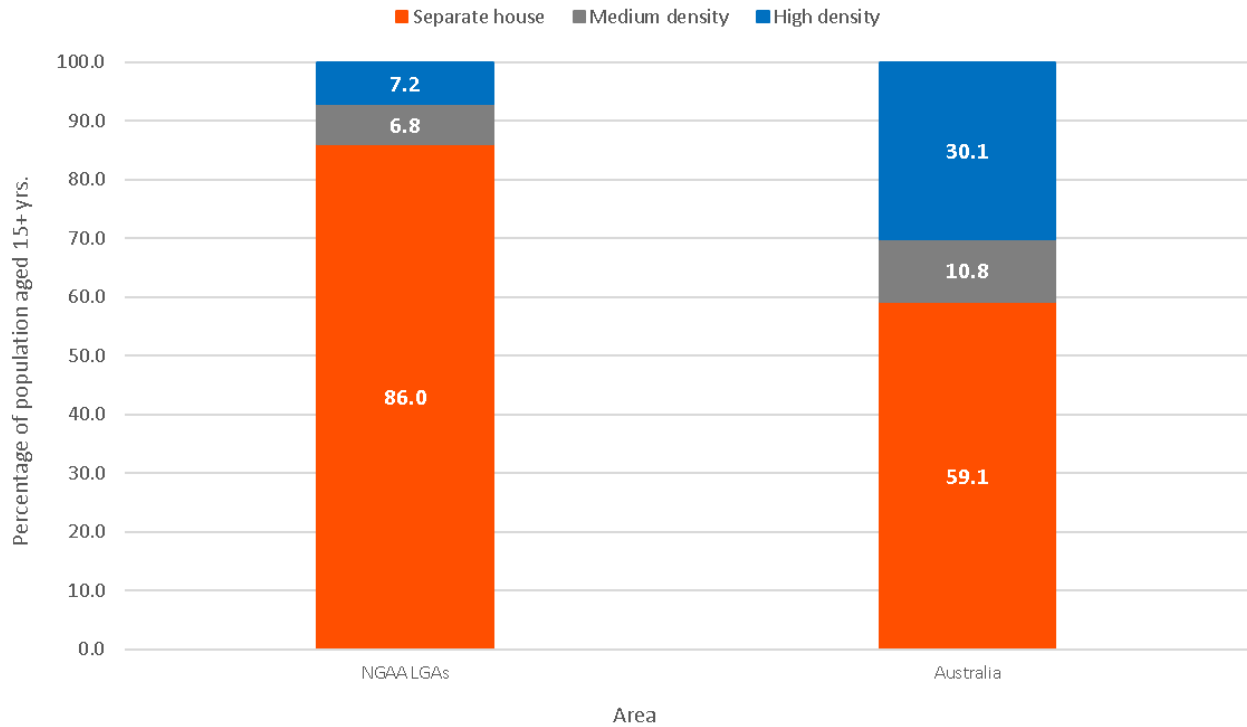
Separate houses increased by 0.5% in NGAA LGAs between 2016 and 2021, a trend different to that of Australia, where separate houses, as a proportion of all dwelling types, decreased by 0.9%. Medium-density dwellings decreased in proportion in both NGAA LGAs and Australia. However, in NGAA LGAs, the proportion of medium-density dwellings has decreased by 1% since 2016, whereas in Australia, the decrease was 0.6%.



Change in dwelling type for NGAA LGAs, 2016-2021 (source: ABS)

Since the 2016 Census, 286,216 new separate houses, and medium-density and high-density dwellings were added to the housing stock in NGAA LGAs. Of those, 86% were separate houses, 6.8% were medium-density dwellings, and 7.2% were high-density dwellings.

This mix of housing types is different from Australia as a whole. Between 2016 and 2021, 59.1% of all new dwellings were separate houses, 10.8% medium density dwellings, and 30.1% were high-density dwellings.



Dwelling types for new dwellings in NGAA LGAs completed between 2016 and 2021 (source: ABS)

15. Tenure type

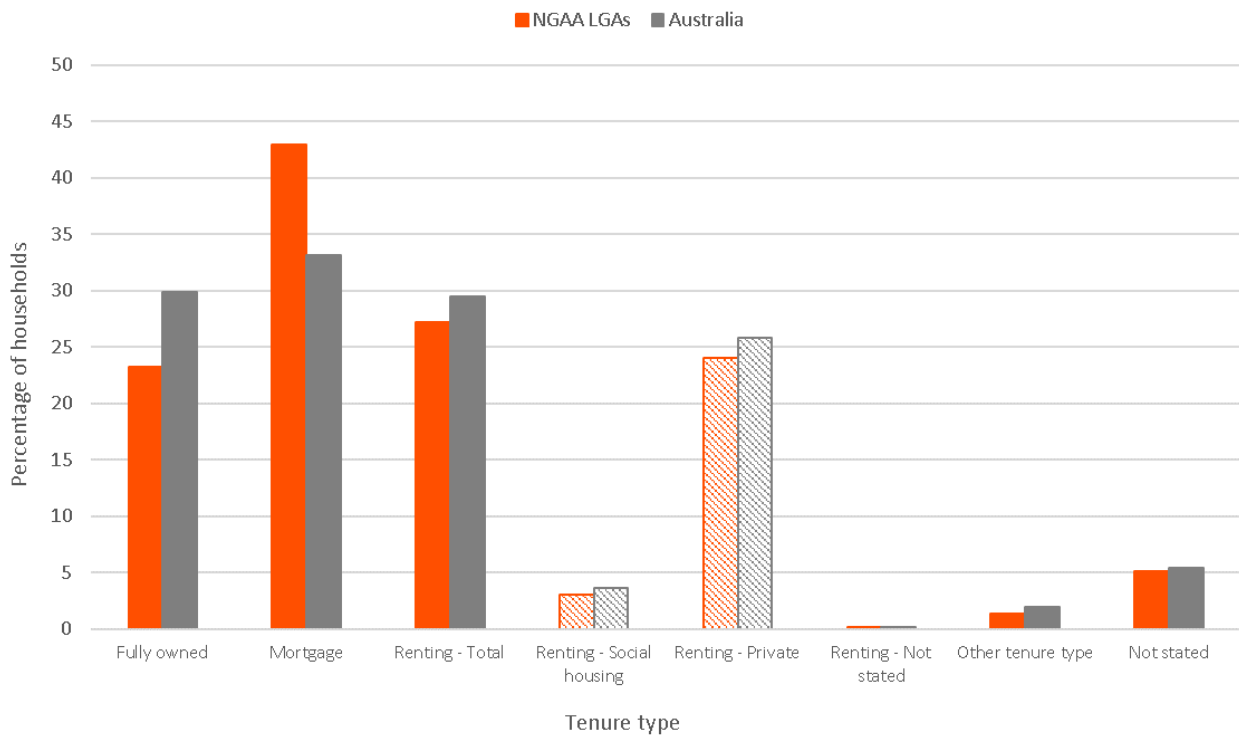
Housing tenure data provides insights into the socio-economic status of NGAA LGAs and their role in the housing market. For example, a high concentration of private renters may indicate a transient area attractive to young singles and couples, while a concentration of homeowners indicates a more settled area with mature families and empty-nesters. Tenure can also reflect built form, with a significantly higher share of renters in high-density housing and a substantially larger proportion of home-owners in separate houses. However, this is not always the case.

Most households in NGAA LGAs are owned with a mortgage. In 2021, 43% of households owned a mortgage, a proportion notably higher than in Australia, where 33.2% of households owned a mortgage.

As NGAA LGAs are usually homes to younger homeowners or occupants, there is a higher proportion of households owned with a mortgage, as the occupants are in the early stages of their mortgage lifespan. This information can also be helpful when assessing mortgage stress, especially for residents and newly purchased households.

Renting was the second most dominant tenure type in NGAA LGAs, with 27.2% of households being rented, most of them privately. Compared to Australia, NGAA LGAs have a slightly lower proportion of rented households. Social housing comprised only 3% of all households in NGAA LGAs, a proportion marginally lower than in Australia (3.6%).

Fully owned households make up 23.2% of all households in NGAA LGAs. This proportion is lower than in Australia, where 29.9% of all households are fully owned.

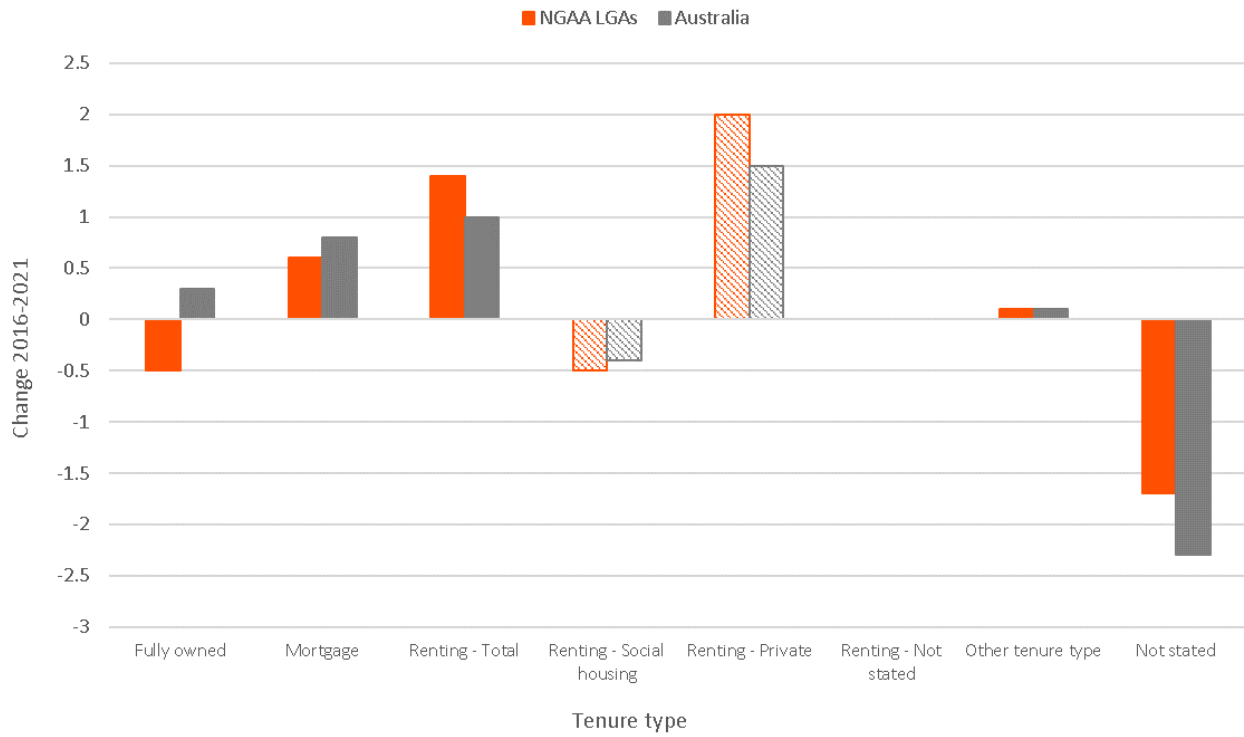


Tenure types in NGAA LGAs, 2021 (source: ABS)

Since 2016, the most significant increase in tenure type has been for renting, with an increase of 1.4%. However, when split by private and social, social housing renting as a tenure type decreased by 0.5% since 2016 whereas private renting increased by 2%. A similar trend was recorded in Australia, where social housing renting decreased proportion and private renting increased.

Households owned with a mortgage increased in NGAA LGAs by 0.6% since 2016 and 0.8% in Australia. Conversely, fully-owned households decreased in proportion in NGAA LGAs by 0.5% but increased in Australia by 0.3% since 2016.

Lastly, the not stated category decreased significantly between 2016 and 2021, a sign of improved data quality in 2021 but something that could overinflate increases in some actual tenure types.



Change in tenure type, NGAA LGAs, 2016-2021 (source: ABS)

16. Housing costs

Housing costs are an important cost of living component and are determined by several factors such as the demand levels in a housing market locally, the tenure type and specifics of housing costs/purchase prices and home loan levels or rental prices. For example, if housing costs in certain areas are very high, it could be indicative of over-demand or inadequate levels of housing supply (both housing stock for purchase and rental).

In 2020/21, housing costs made up around 20% of Australia’s household expenditure, based on modelled analysis by the National Institute of Economic and Industry Research (NIEIR).

Modelled data suggests that housing expenditure in Australia has been increasing over time.

In 2015/16, housing made up 19.5% of all household expenditures in Australia. Note – this modelling does not differentiate between rental payments or home loan repayments.

The information used in this section is from the 2021 Census and .id acknowledges that since then, the Reserve Bank of Australia (RBA) cash rate, Australia’s official interest rate has

increased, with steady monthly increases since April 2022. These increases in the official cash rate would have influenced tenure costs (mainly home loan repayments) and mortgage affordability. Still, findings in this section are valuable, and if specific metrics suggest high levels of home loan repayments or mortgage stress, it can be assumed that these trends have only amplified since the 2021 Census.

16.1 Mortgage costs

In 2021, the median weekly mortgage repayments in NGAA LGAs was \$443 (\$1,920 monthly), slightly higher than in Australia, where median weekly mortgage repayments were \$432 (\$1,872 monthly).

A low proportion of NGAA LGAs has monthly housing loan repayments of \$1,200 or less. Compared to Australia, 17% of NGAA households with a housing loan pay less than \$1,200 monthly loan repayments. In Australia, 21.4% pay less than \$1,200 each month.

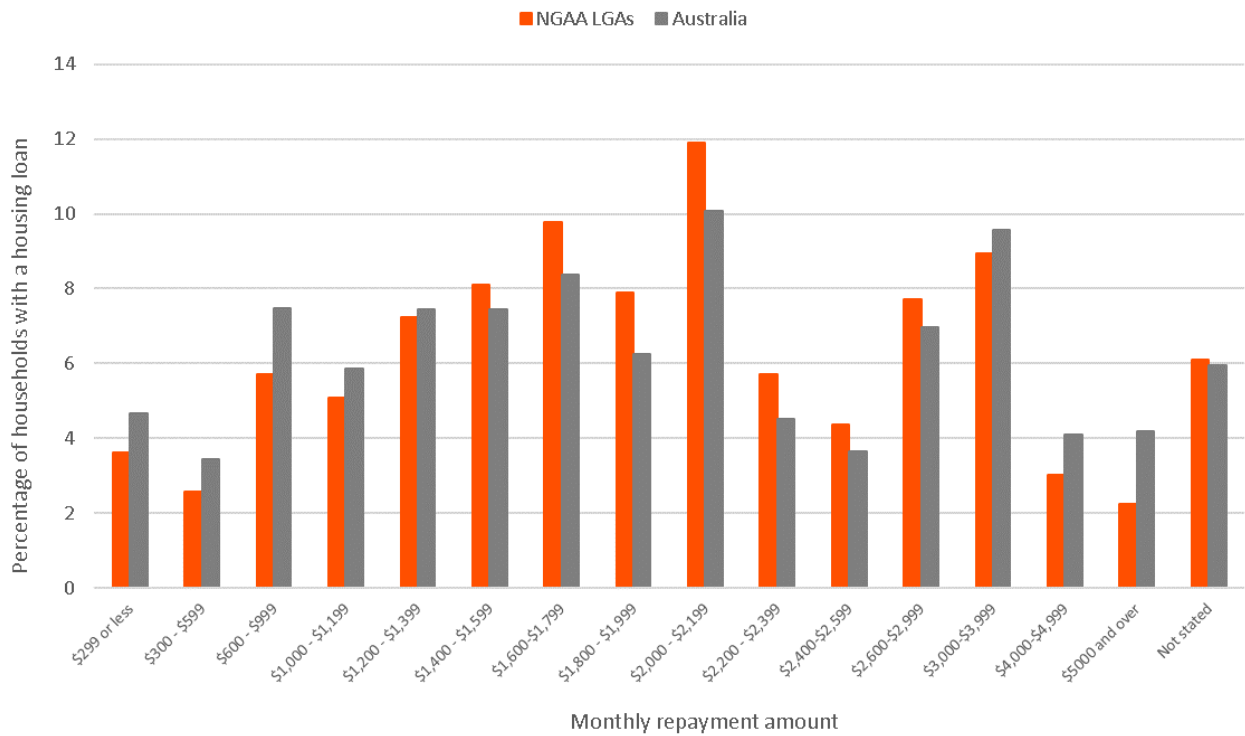
A higher proportion of NGAA LGAs households pay between \$1,200 and \$2,599 in loan repayments each month (54.9%), which is higher than in Australia, where 47.8% of households with a housing loan pay between \$1,200 and \$2,599 a month.

A lower proportion of NGAA LGAs pay over \$2,600 in loan repayments each month (21.9%) compared to Australia, where 24.8% of households spend over \$2,600 in loan repayments each month.

Within NGAA LGAs, these are the median weekly mortgage/housing loan repayments by State/Territory for 2021:

- ▣ Growth areas in NSW: **\$539 per week**
- ▣ Growth areas in QLD: **\$403 per week**
- ▣ Growth areas in SA: **\$317 per week**
- ▣ Growth areas in Vic: **\$437 per week**
- ▣ Growth areas in WA: **\$417 per week**

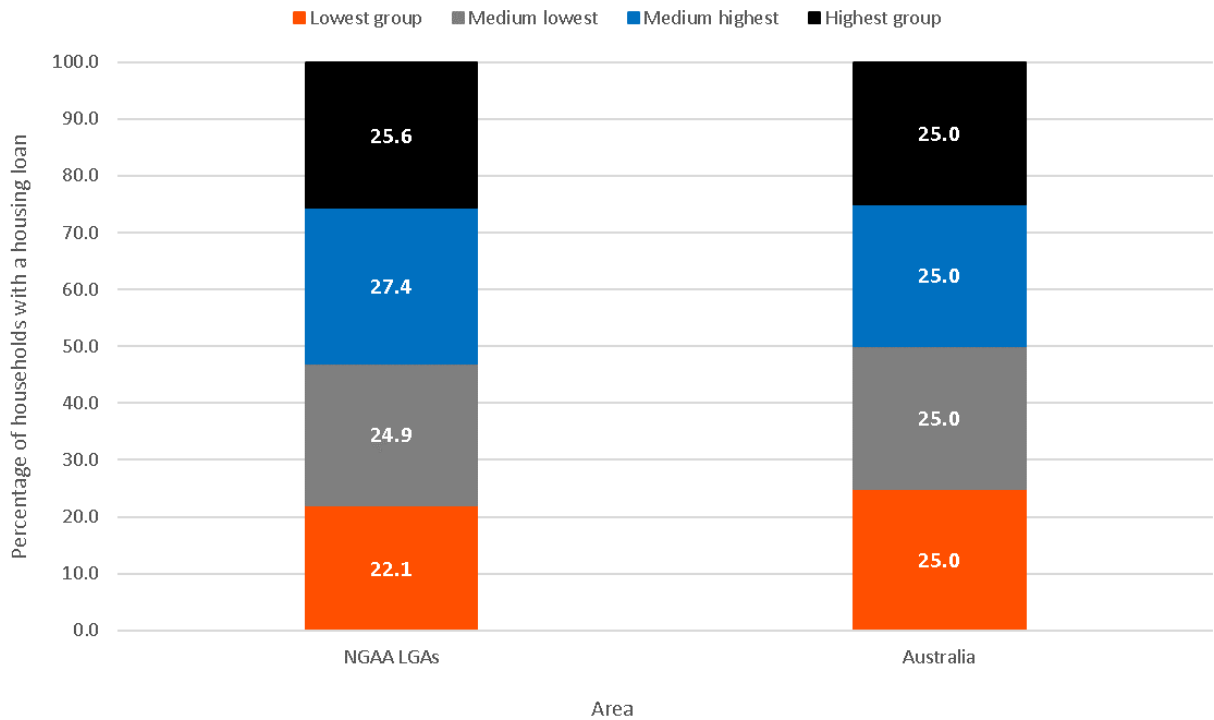
- ▣ **NGAA LGAs: \$443 per week**



Monthly housing loan repayments, NGAA LGAs, 2021 (source: ABS)

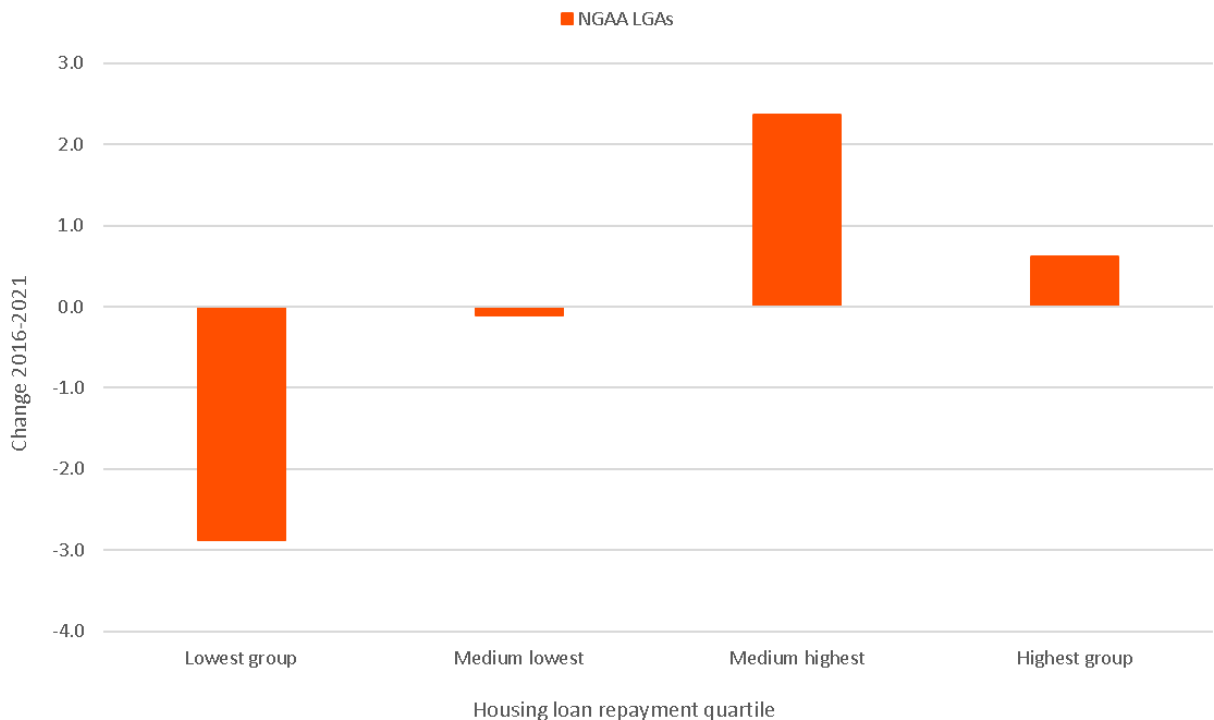
Housing loan quartile assessment provides the ability to compare levels of housing loan payments over time. The quartile group dollar ranges for 2016 and 2021 are outlined later in this section. In 2021, fewer households in NGAA LGAs were in the lowest quartile (22.1%) than in Australia (25%). An almost similar proportion of households are in the medium lowest quartile in NGAA LGAs (24.9%) as in Australia.

On the other hand, more households in NGAA LGAs were in the medium highest and highest loan repayment quartiles than Australia, with 27.4% of households in the medium highest quartile (compared to 25% of Australia) and 25.6% in the highest quartile (again compared to 25% of Australia).



Housing loan repayment quartiles, NGAA LGAs, 2021 (source: ABS)

Since 2016, the proportion of housing loan repayments in lower quartiles has decreased in NGAA LGAs. However, it increased in higher repayment quartiles, meaning that households in NGAA LGAs are paying more in housing loan repayments. The lowest quartile decreased by 2.9%; little change was recorded in the medium lowest quartile, with increases of 2.4% in the medium highest quartile and 0.6% in the highest quartile.



Changes in housing loan repayment quartiles, 2016-2021 (source: ABS)

Housing loan repayment quartile	2021	2016
Lowest group	\$0 to \$1,254	\$0 to \$1,184
Medium lowest	\$1,255 to \$1,873	\$1,185 to \$1,784
Medium highest	\$1,874 to \$2,675	\$1,785 to \$2,518
Highest group	\$2,676 and over	\$2,519 and over

Housing loan – quartile group dollar ranges

16.2 Rental costs

In 2021, the median weekly rental payments in NGAA LGAs were \$371, slightly lower than in Australia, where median weekly rental payments were \$380.

A low proportion of NGAA LGAs has rental payments of \$249 or less per week. Compared to Australia, 13.1% of NGAA households that rent pay less than \$249 in rental payments each week. In Australia, 18.1% pay less than \$249 each week.

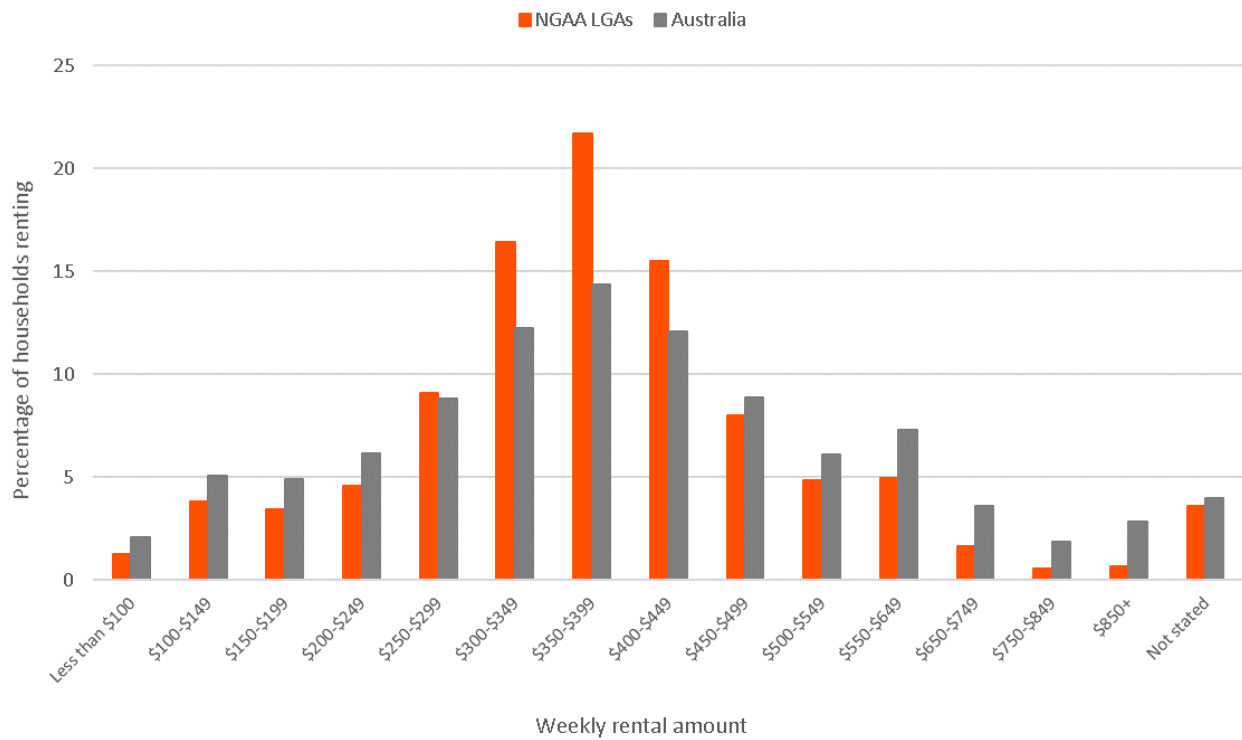
A higher proportion of NGAA LGAs households pay between \$250 and \$499 in rental payments each week (70.7%), which is higher than in Australia, where 56.3% of households that rent pay between \$250 and \$499 per week.

A lower proportion of NGAA LGAs pay over \$500 in rental payments each week (12.7%) compared to Australia, where 21.6% of households spend over \$500 in rental payments each week.

Within NGAA LGAs, these are the median weekly rental payments by State/Territory for 2021:

- ▾ Growth areas in NSW: **\$423 per week**
- ▾ Growth areas in QLD: **\$360 per week**
- ▾ Growth areas in SA: **\$282 per week**
- ▾ Growth areas in Vic: **\$373 per week**
- ▾ Growth areas in WA: **\$344 per week**

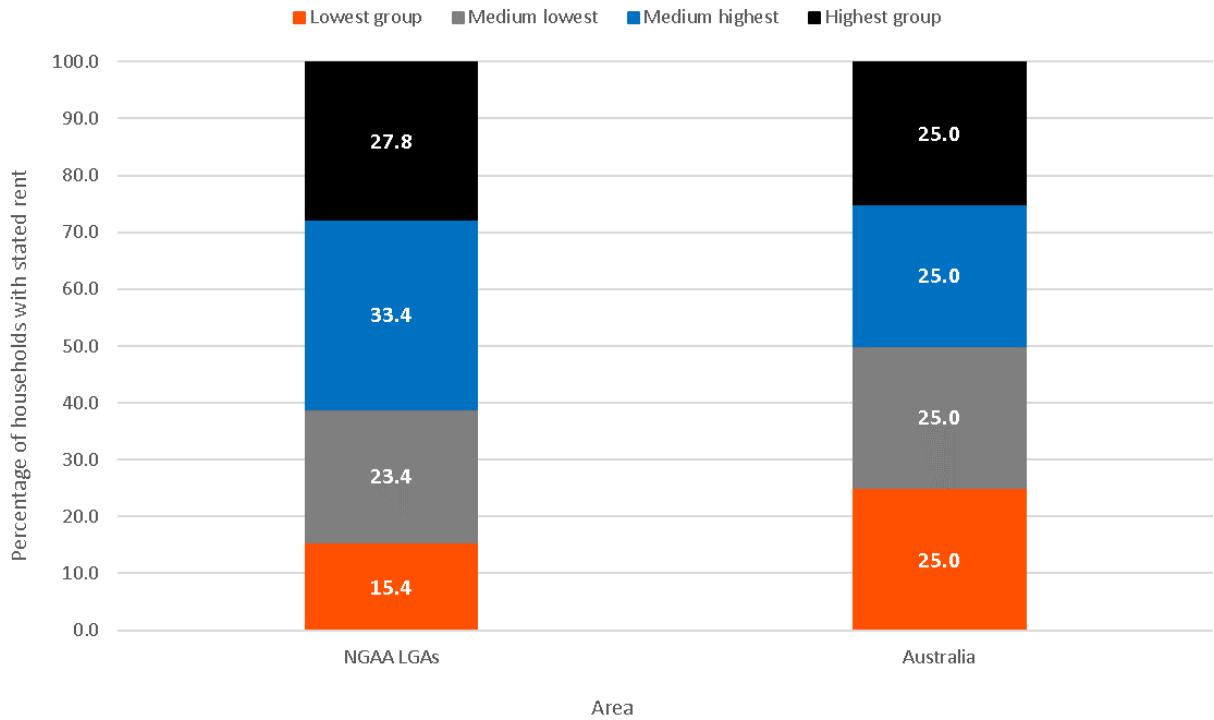
- ▾ **NGAA LGAs: \$371 per week**



Weekly rental amount payments, NGAA LGAs, 2021 (source: ABS)

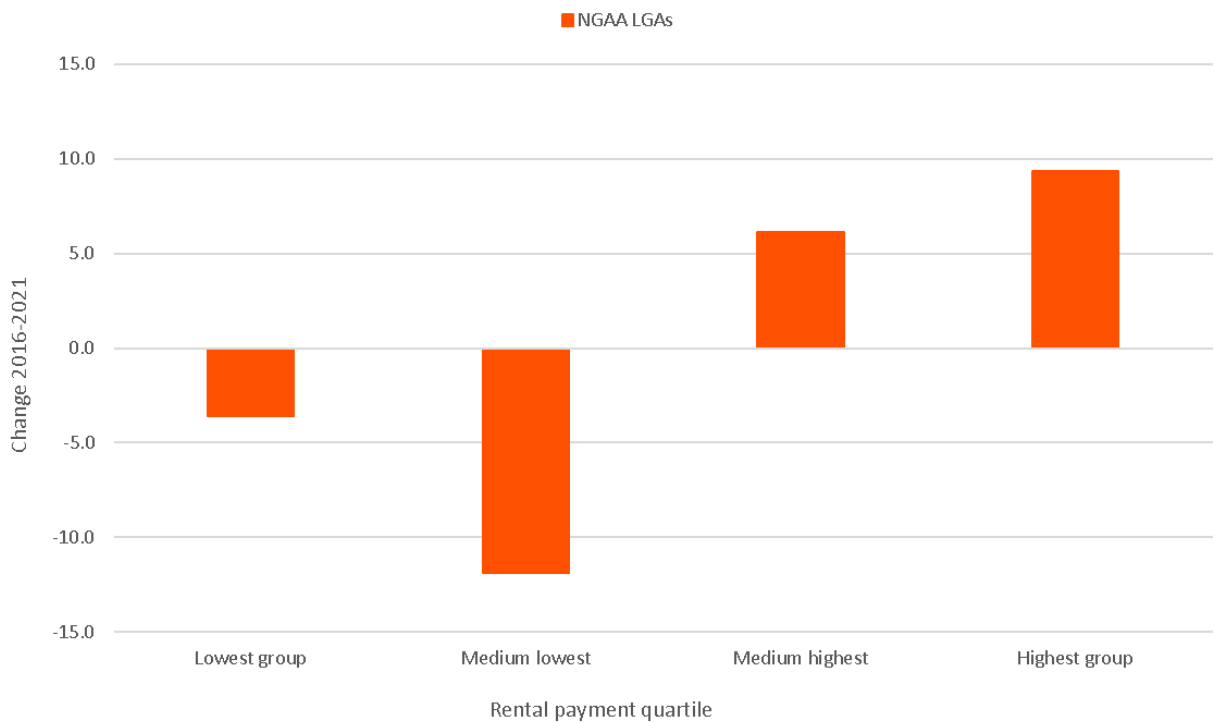
The housing rental quartile assessment provides the ability to compare levels of rental payments over time. The quartile group dollar ranges for 2016 and 2021 are outlined later in this section. In 2021, fewer households in NGAA LGAs were in the lowest quartile (25.4%) than in Australia (25%). A slightly lower proportion of households were in the medium lowest quartile in NGAA LGAs (23.4%) than in Australia (25%).

On the other hand, more households in NGAA LGAs were in the medium highest and highest rental payment quartiles than Australia, with 33.4% of households in the medium highest quartile (compared to 25% of Australia) and 27.8% in the highest quartile (again compared to 25% of Australia).



Housing rental payment quartiles, NGAA LGAs, 2021 (source: ABS)

Since 2016, the proportion of rental payments in lower quartiles has decreased in NGAA LGAs. However, it increased in higher payment quartiles, meaning that households in NGAA LGAs are paying more in rental payments. The lowest quartile decreased by 3.6%, with the medium lowest quartile decreasing by an even larger margin, 11.9%, since 2016. The medium-highest quartile of rental payments increased by 6.1%, and the highest, by 9.4%.



Changes in rental payment quartiles, 2016-2021 (source: ABS)

Rental payment quartile	2021	2016
Lowest group	\$0 to \$282	\$0 to \$248
Medium lowest	\$283 to \$380	\$249 to \$345
Medium highest	\$381 to \$485	\$346 to \$446
Highest group	\$486 and over	\$447 and over

Rental payments– quartile group dollar ranges

16.3 Mortgage affordability

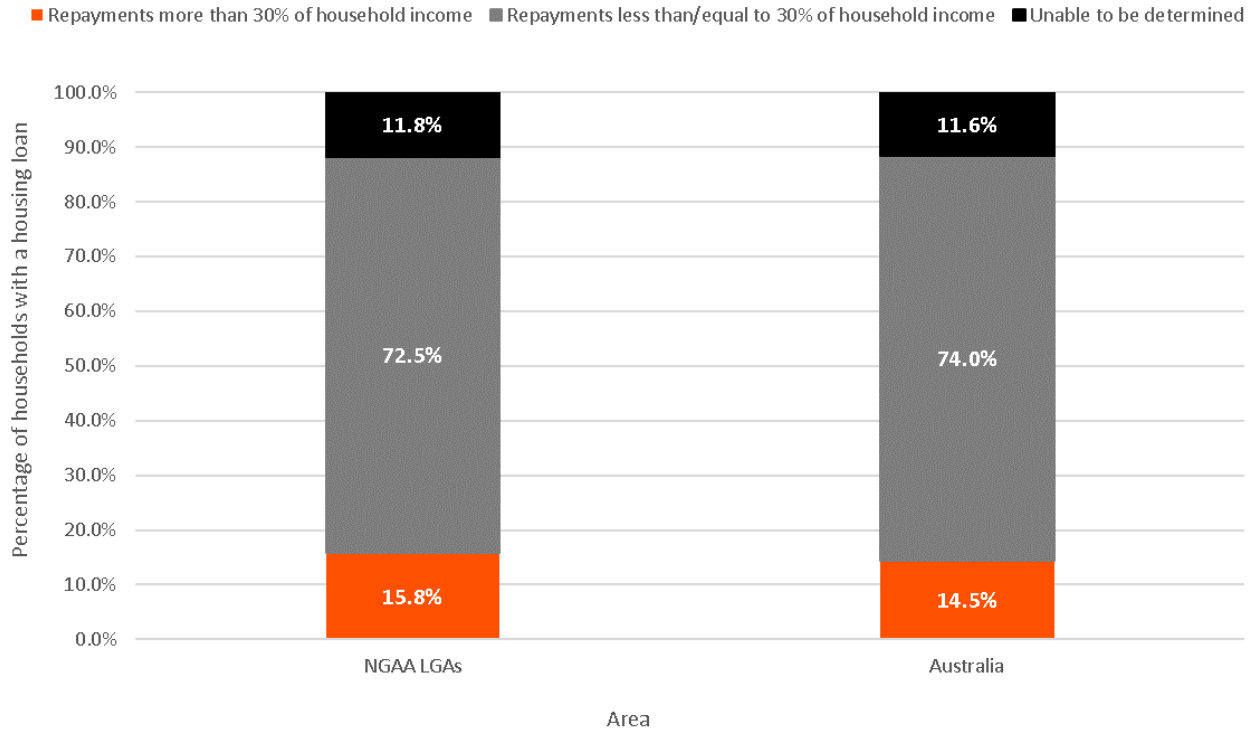
As part of the Census 2021 data release, the Australian Bureau of Statistics created a “Mortgage affordability indicator (MAID)”. This variable allocates an in-scope household to one of two categories:

- ▣ Mortgage repayments less than or equal to 30% of household income.
- ▣ Mortgage repayments more than 30% of household income.

These statistics can be considered basic mortgage stress statistics and are valuable when understanding what proportion of NGAA LGA households are paying more than 30% of their household income to service mortgage payments.

Given that this information is from 2021 before several interest rate increases occurred, it is logical to assume that since 2021, mortgage affordability has decreased. This is because more households are paying over 30% of their household income towards mortgage repayments as payments increase due to interest rate rises.

In 2021, 15.8% of households with a housing loan were paying more than 30% of their household income on loan repayments. This was higher than in Australia, where 14.5% of households with a housing loan spent 30% or more of household income on loan repayments.



Mortgage affordability in NGAA LGAs, 2021 (source: ABS)

Within NGAA LGAs, municipalities that had the highest levels of households with repayments of over 30% were: Liverpool (23%), Campbelltown (21.2%), Hume (20.4%), The Hills Shire (18.8%), Camden (18.3%), Casey (also 18.3%) and Whittlesea (18.2%). Overall, 12 LGAs were experiencing higher levels of “mortgage stress” than NGAA LGAs as a whole and 16 of 29 LGAs had “mortgage stress” levels above that of Australia.

On the other hand, LGAs such as Ipswich had much lower rates of “mortgage stress”, with only 10.1% of households paying more than 30% of household income towards mortgage payments. Other NGAA LGAs with low levels of mortgage stress were Rockingham (11.5%), Redland (11.8%), Mandurah (12.5%) and Cockburn (12.6%).

NGAA LGA	Repayments of more than 30% of household income
Liverpool	23.0%
Campbelltown (NSW)	21.2%
Hume	20.4%
The Hills Shire	18.8%
Camden	18.3%
Casey	18.3%
Whittlesea	18.2%

NGAA LGA	Repayments of more than 30% of household income
Blacktown	18.0%
Melton	17.3%
Wollondilly	17.0%
Penrith	16.8%
Wyndham	16.5%
NGAA LGAs	15.8%
Gosnells	15.4%
Swan	15.1%
Cardinia	15.1%
Serpentine-Jarrahdale	14.8%
Australia	14.5%
Wanneroo	14.4%
Mitchell	14.3%
Playford	14.1%
Armadale	13.8%
Kwinana	13.6%
Logan	13.2%
Cockburn	12.6%
Mandurah	12.5%
Redland	11.8%
Rockingham	11.5%
Moreton Bay	11.2%
Mount Barker	10.7%
Ipswich	10.1%

Mortgage affordability for all NGAA LGAs, 2021 (source: ABS)

16.4 Rental affordability

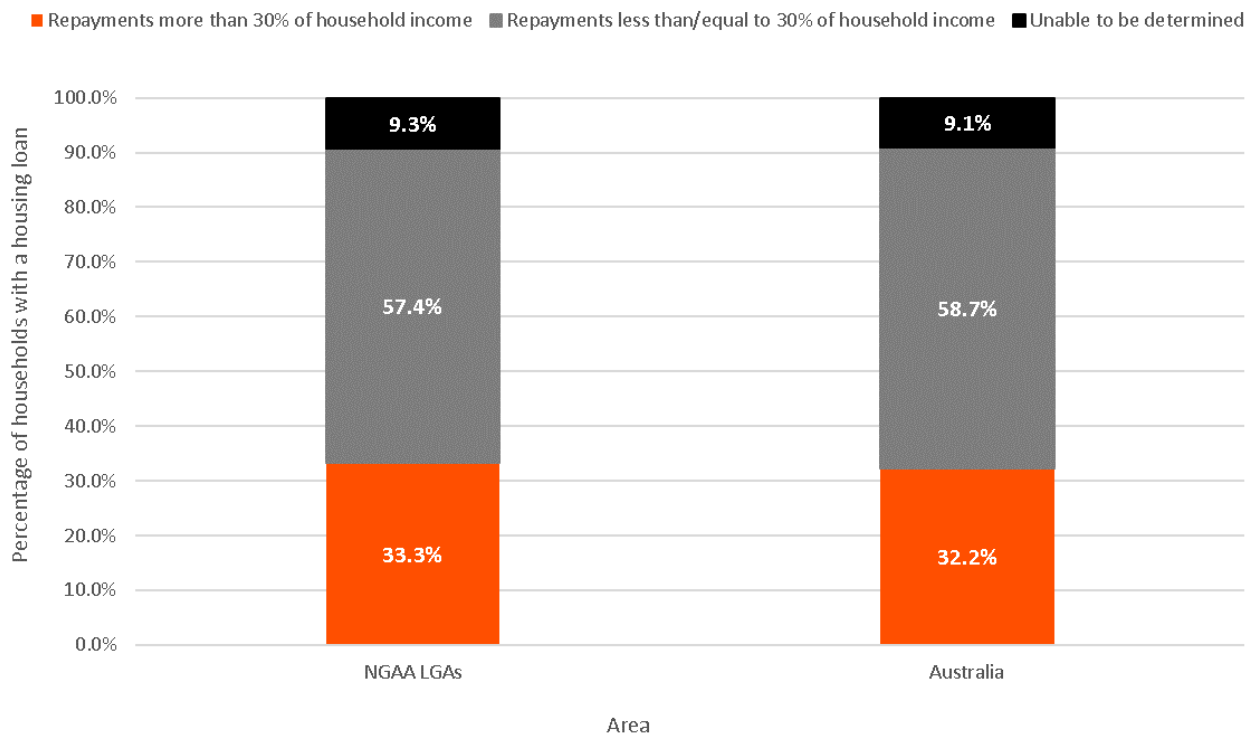
As part of the Census 2021 data release, the Australian Bureau of Statistics also created a “Rental affordability indicator (RAID)”. This variable allocates an in-scope household to one of two categories:

- ☐ Rent payments less than or equal to 30% of household income.
- ☐ Rent payments more than 30% of household income

These statistics can be considered basic rental stress statistics and are valuable when understanding what proportion of NGAA LGA households are paying more than 30% of their household income towards rental costs.

Given that this information is from 2021 and rental costs have increased variably within Australia, it could be assumed that any rental stress recorded in the 2021 statistics would have increased since then.

In 2021, 33.3% of households with stated rent were paying more than 30% of their household income on loan repayments. This was slightly higher than in Australia, where 32.2% of households with a housing loan paid 30% or more of household income on loan repayments.



Rental affordability in NGAA LGAs, 2021 (source: ABS)

Within NGAA LGAs, municipalities that had the highest levels of households with rental payments of over 30% were: Liverpool (41.2%), Mandurah (39.7%), Wollondilly (37.7%), Hume (37.1%), Redland (36.4%) and Moreton Bay (35.2%). Overall, 10 LGAs were experiencing higher levels of “rental stress” than NGAA LGAs as a whole and 16 of 29 LGAs had “rental stress” levels above that of Australia.

On the other hand, LGAs such as Wyndham had much lower rates of “rental stress”, with 27.9% of households paying more than 30% of household income towards mortgage payments. Other NGAA LGAs with relatively low levels of mortgage stress were Mitchell (29.0%), Cockburn (29.5%), Casey (29.9%) and The Hills Shire (also 29.9%).

NGAA LGA	Repayments of more than 30% of household income
Liverpool	41.2%
Mandurah	39.7%
Wollondilly	37.7%
Hume	37.1%
Redland	36.4%
Moreton Bay	35.2%
Logan	34.8%
Penrith	34.8%
Campbelltown (NSW)	34.3%
Melton	34.0%
NGAA LGAs	33.3%
Armadale	33.3%
Wanneroo	33.2%
Playford	32.9%
Rockingham	32.8%
Whittlesea	32.7%
Camden	32.3%
Australia	32.2%
Serpentine-Jarrahdale	32.1%
Swan	31.9%
Mount Barker	31.8%
Cardinia	31.4%
Blacktown	31.1%
Ipswich	30.8%
Gosnells	30.8%
Kwinana	30.5%
The Hills Shire	29.9%
Casey	29.9%
Cockburn	29.5%
Mitchell	29.0%
Wyndham	27.9%

Rental affordability for all NGAA LGAs, 2021 (source: ABS)

17. Summary of demographic and socio-economic characteristics

- Growth areas across Australia have different demographic and socio-economic characteristics from the rest of Australia.** Apart from growing rapidly, there are also key differences between residents, household composition and the built form of dwellings in these areas to the rest of Australia which should be understood to plan effectively and allocate resources appropriately in these areas.
- In 2021, 5.3 million Australians lived in growth area LGAs across Australia, representing 20.6% of Australia's population.** The population of NGAA LGAs grew by 34% between 2011 and 2016, more than double the growth rate of Australia in the same period. Even in the 2020-21 period, when much of Australia's growth was low (0.1%) due to international border closures and lack of net overseas migration, NGAA LGAs grew in population by 2.1%.
- The median age of NGAA LGAs is 35 years, which is three years younger than Australia's median age.** NGAA LGAs have a higher share of family-forming aged residents with children than Australia, and a lower percentage of residents aged over 65 years. However, even in NGAA LGAs, the trend of ageing is beginning to show through demographic statistics, with a 1.2% increase in residents aged 70 years or older since 2016.
- Households in NGAA LGAs are predominantly families with children.** This is related to the role and function of growth areas – to provide housing for families, first-home buyers and those seeking more affordable or competitively priced housing. Households are larger in NGAA LGAs, compared to Australia, and dwelling types are predominantly larger stand-alone houses. However, over time, lone-person households have increased most, in proportion terms. This is partly a result of ageing in place of residents who have lived in NGAA LGAs for some time.
- The migration dynamics in NGAA LGAs show large net gains of residents aged 25-44 years, representing young couples and families with young children, but a loss (or low net gain) of 18-24-year-olds, who usually represent home leavers.** Substantial migration to NGAA LGAs remained even in 2020-21, as housing supply

continued to attract new residents located within Australia, even with low levels of net overseas migration.

- ▾ **From a cultural diversity perspective, NGAA LGAs are diverse but with a different cultural make-up.** There are more residents born overseas in NGAA LGAs than Australia, and their birthplace characteristics are different. More overseas-born NGAA LGA residents are born in countries like India, New Zealand or the Philippines, and fewer in countries like China, which is a more common birthplace in Australia.
- ▾ **Strongly related to birthplace statistics are the languages spoken statistics.** They also show a different profile in NGAA LGAs than in Australia. For example, in growth areas, Punjabi, Arabic, Filipino/Tagalog and Hindi are much more commonly spoken than in Australia. Conversely, Mandarin is more widely spoken in Australia than in NGAA LGAs.
- ▾ **A lower proportion of overseas arrivals in NGAA LGAs are recent arrivals (last five years) compared to the rest of Australia,** indicating that recent arrivals likely settle in larger metropolitan centres first before moving out to growth areas. However, in 2021, a much higher proportion of overseas-born NGAA LGA residents arrived in Australia 10-15 years ago.
- ▾ **NGAA LGAs had slightly lower proportions of residents who required assistance than Australia.** This is likely related to the overall younger age profile of NGAA LGAs. However, need for assistance by age group statistics show that beyond the age of 60, residents in NGAA LGAs had a higher need for assistance due to disability than Australia.
- ▾ **Residents in NGAA LGAs have slightly higher rates of diabetes and asthma but lower rates of other conditions such as arthritis, cancer, heart disease, mental health or dementia.** Age is a confounding factor for some of these conditions and likely plays a part in the lower rates of long-term health conditions in NGAA LGAs.
- ▾ **Household incomes in NGAA LGAs are predominantly in the middle-income ranges but have declined to lower income ranges over time.** Within Australia, New South Wales growth areas had the highest median household incomes, followed by Victoria. On the other hand, growth areas in South Australia and Queensland had the lowest median household incomes.

- ▣ **Education statistics for NGAA LGAs show slightly lower (but increasing) levels of Year 12 completion compared to Australia.** The highest qualifications achieved for NGAA residents who have post-school qualifications were Vocational qualifications, followed by Bachelor or higher degrees. Compared to Australia, NGAA LGA residents had higher levels of vocational qualifications and lower levels of Bachelor or Higher degree qualifications.
- ▣ **Labour force participation in NGAA LGAs was slightly higher than in Australia overall,** but a somewhat lower proportion of residents were employed than in Australia. Over time, rates of full-time employment decreased and part-time increased.
- ▣ **Top industries of employment in NGAA LGAs are “Health Care and Social Assistance”, “Construction” and “Retail Trade”.** Compared to Australia, NGAA LGAs have more residents employed in industries such as retail trade, manufacturing or construction and fewer in education and training, professional/scientific and technical services and accommodation and food services.
- ▣ **Methods of travel to work in NGAA LGAs reflect their geographic position, usually on the outer edges of Greater Capital Cities or larger regional centres.** A higher proportion of employed residents drive a car to work than in Australia; a higher proportion use trains, but a lower proportion walk to work. A slightly lower proportion of employed residents living in NGAA LGAs work from home than in Australia overall, which is likely related to the industries of employment where some industries are not adaptable to working from home. However, as in all of Australia, working from home has been the most significant growing “method of travel to work” since 2016 due to Covid-19 and associated restrictions on movement and working from shared spaces.
- ▣ **Fewer NGAA LGA residents volunteer for a group or organisation compared to Australia, and similar proportions of them provide care** to a person with a disability, long-term illness, or old age. In addition, unpaid childcare is more common in NGAA LGAs than in Australia.
- ▣ **Housing tenure types in NGAA LGAs reflect the role and function of growth areas and the era of settlement.** As most NGAA LGAs are home-to-first-home buyers, the proportion of households owned with a mortgage is higher than in Australia, while the proportion of privately rented or full-owned households, is lower.

- **Mortgage costs in NGAA LGAs are slightly higher than in Australia** and across Australia, are highest in New South Wales and lowest in South Australia, reflective of the local housing markets. On the other hand, Rental costs are lower in NGAA LGAs than in Australia but, as with mortgage costs, are highest in New South Wales and lowest in South Australia.
- **Mortgage and housing affordability and mortgage and rental stress levels are higher in NGAA LGAs than in Australia.** However, these statistics are based on 2021 housing costs, which have increased since then, especially for mortgage repayments, which would have increased mortgage repayment costs and, very likely, mortgage stress too.

18. About .id

.id's team of population experts combine an in-depth knowledge of people and places with interactive web applications to help organisations decide where and when to locate their services to meet changing needs.

The .id team have an incredible curiosity and knowledge about the way in which people organise themselves into communities and cities.

We are driven by a strong desire to contribute to the development of a good society where everyone has access to housing, education, employment, social & political inclusion, culture, health, recreation and information.

Because of our passion for society, we are excited by the projects we engage in, and genuinely interested in the outcomes. This means we work very closely with our clients on scoping projects. We design projects that are pointy, practical and achievable. We draw meaning from data to provide insights that inject confidence into the decision-making process.



expertise Team of over 40 people with extensive knowledge of people and places, helping local governments tackle community and social issues.



understanding 20 years of development and service to local government. Today we work with over 250 councils providing over 650 online information resources and consulting services



evidence Online resources inform in depth analysis which connects demographic, economic, housing, and population forecasting information.



insight Transforming data into knowledge through robust analytical frameworks which focus on the right questions and inject confidence into your decision-making process