



What is shaping population growth in regional Queensland?

Population Insights Workshop - September 2022

.id informed decisions | forecast.id

Today's workshop

1. Who we are
2. Where we thought we were heading
3. What's driving regional growth
4. Real life examples
5. Early insights from the Census
6. Q&A

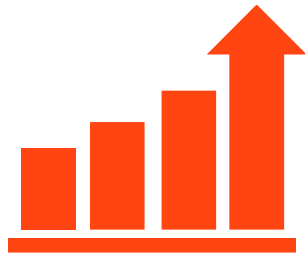




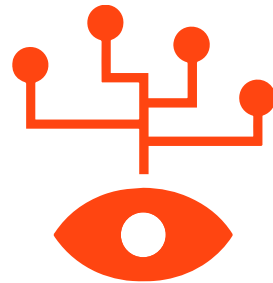
Who are we?

- Company of demographers, housing analysts, forecasters, economists and Census data experts
- 25 years working with Local Government
- 40 employees
- Over 300 local government clients covering 80% of Australia's population
- Partners with National Economics (NIEIR) and IPSOS

What do we do?



We study how cities, towns and regions are growing and changing (population and economy) ...



... and organise complex data in intuitive web applications for people with diverse needs and skills ...



...for a relevant geography to support local area planning...



... so our clients can make informed decisions about when and where to provide services and invest in infrastructure.

...so you can



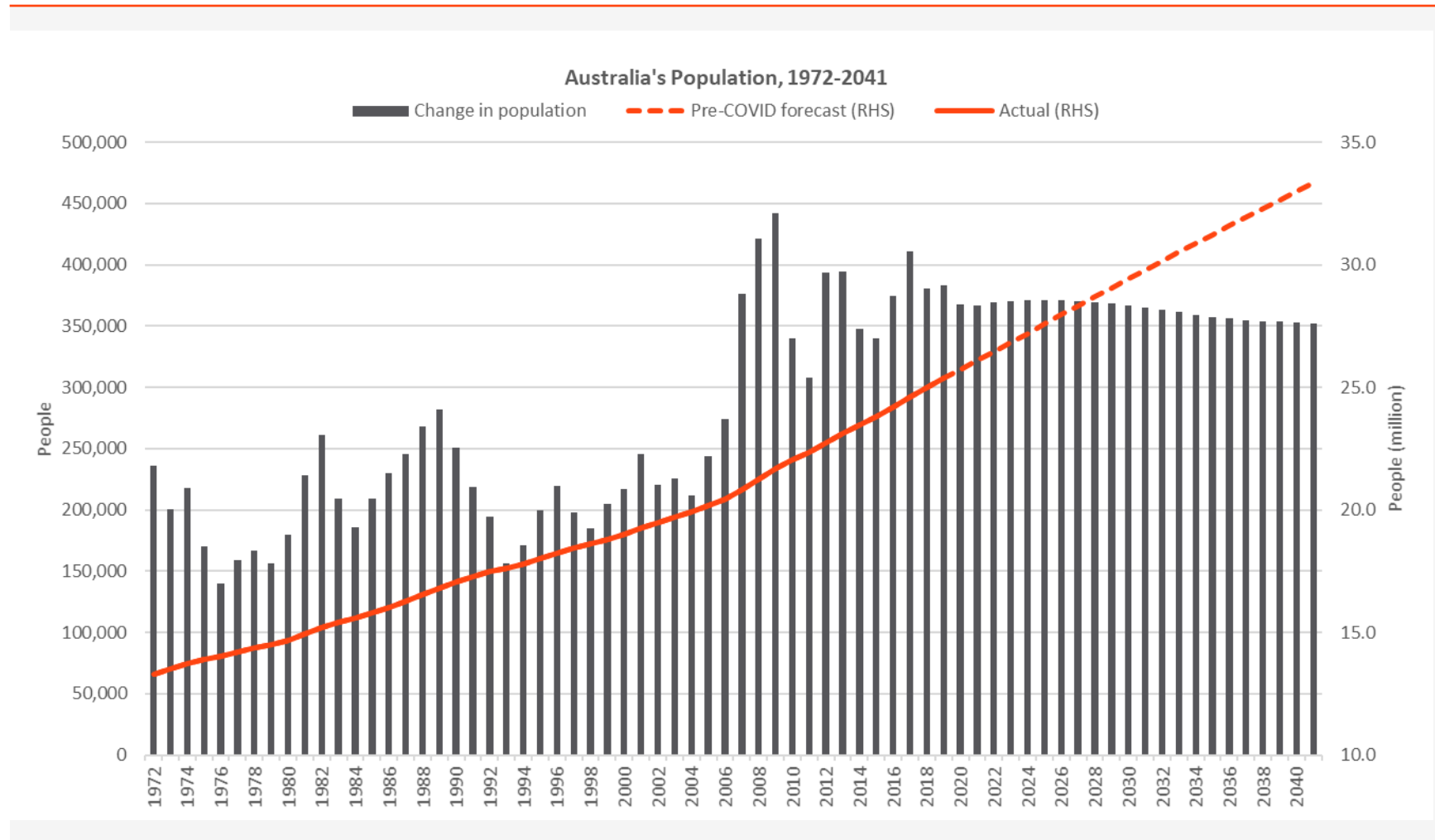
With an evidence base designed to support local government



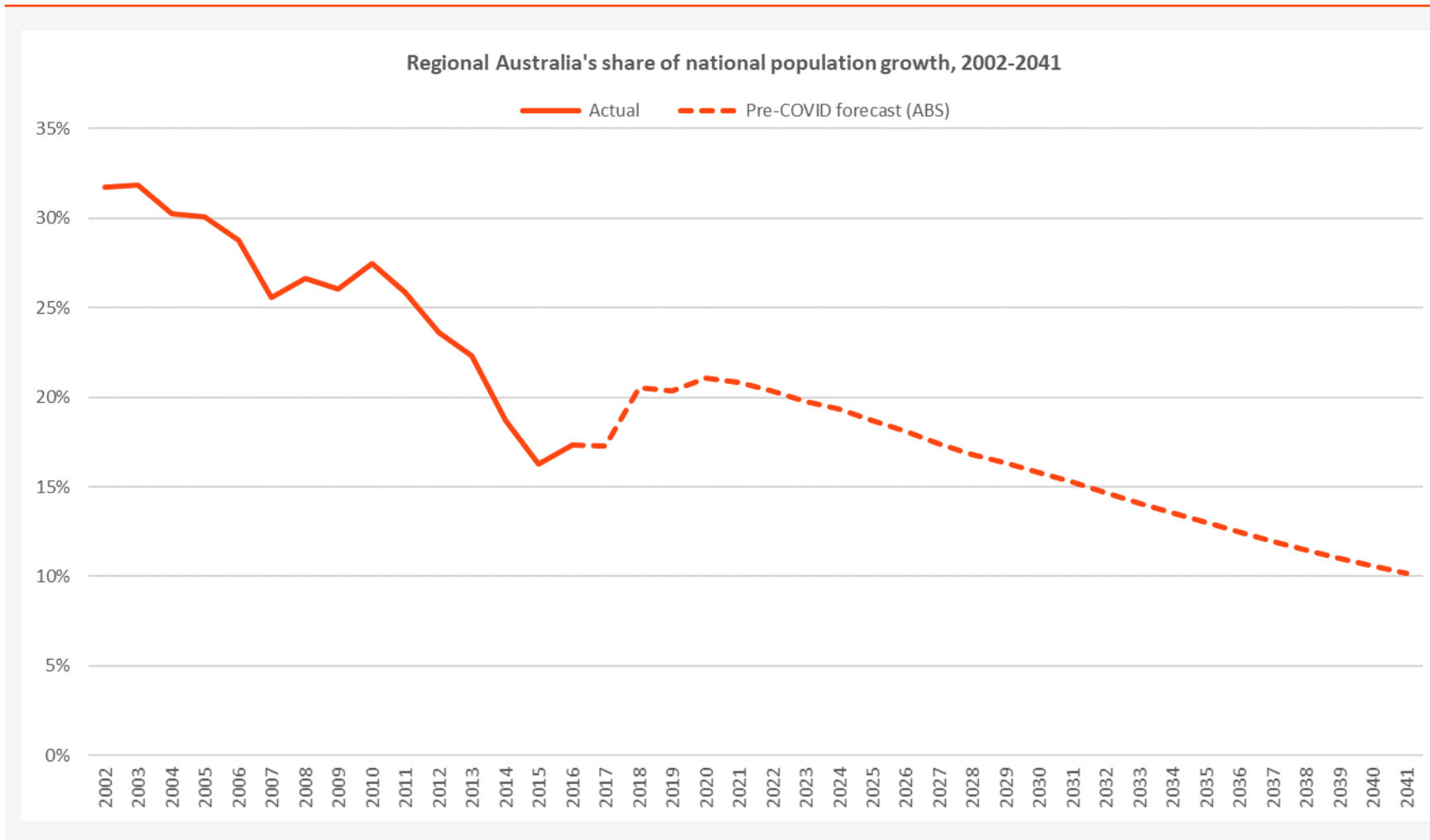
Where we thought we
were heading



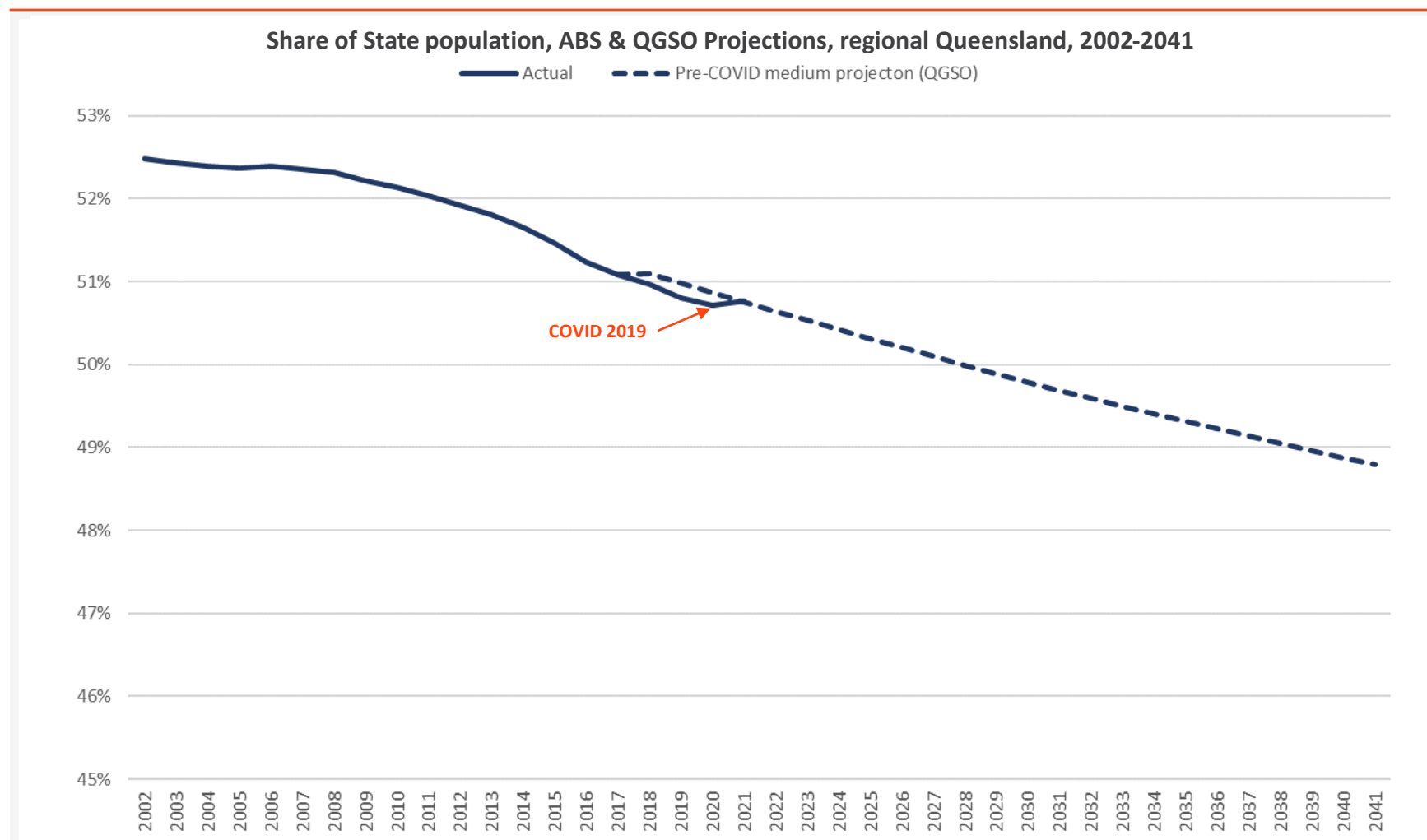
Australia was one of the fastest growing OECD countries, heading to over 33 million people by 2041



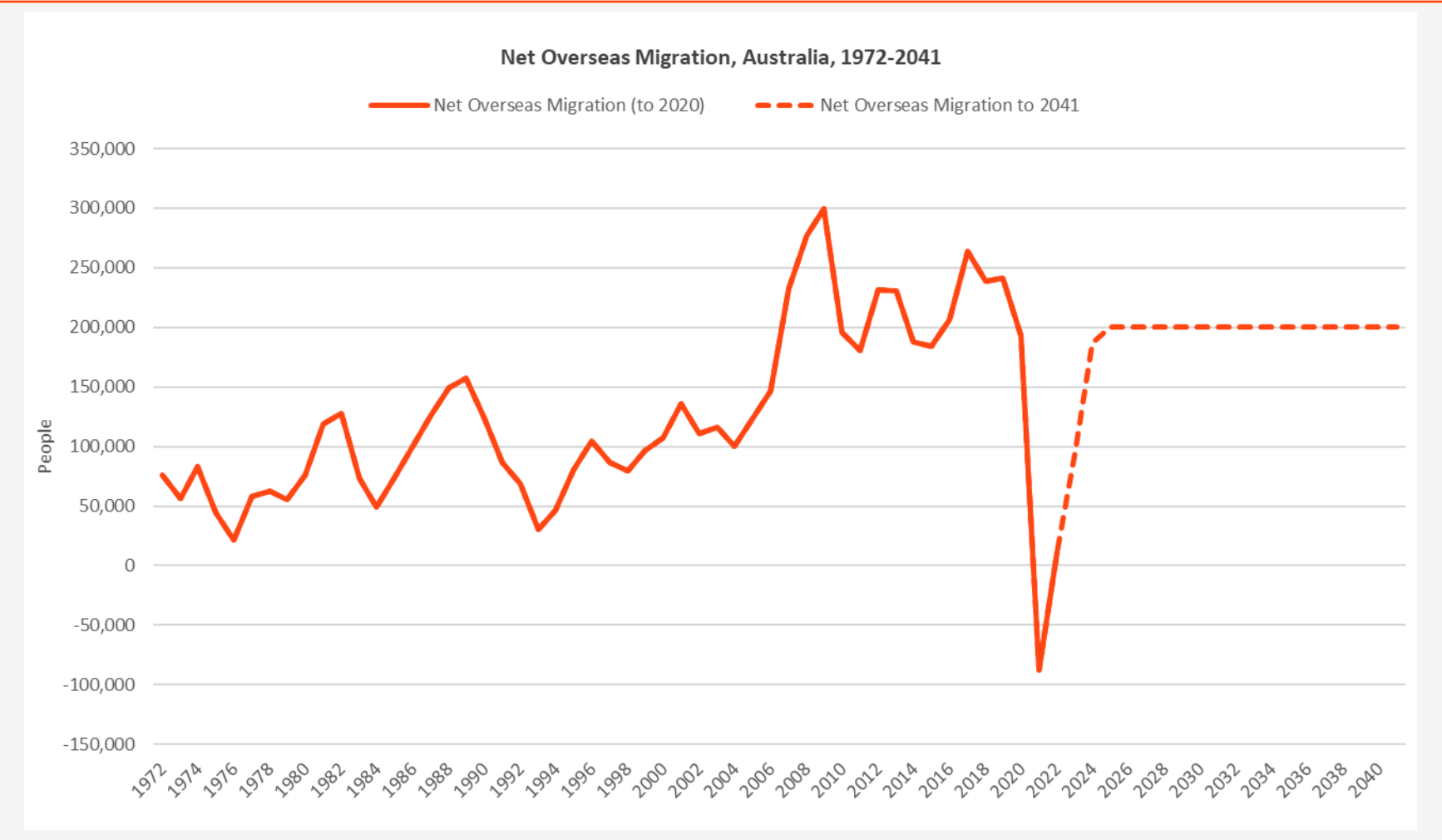
However, ABS' forecasts for regional Australia are still gloomy



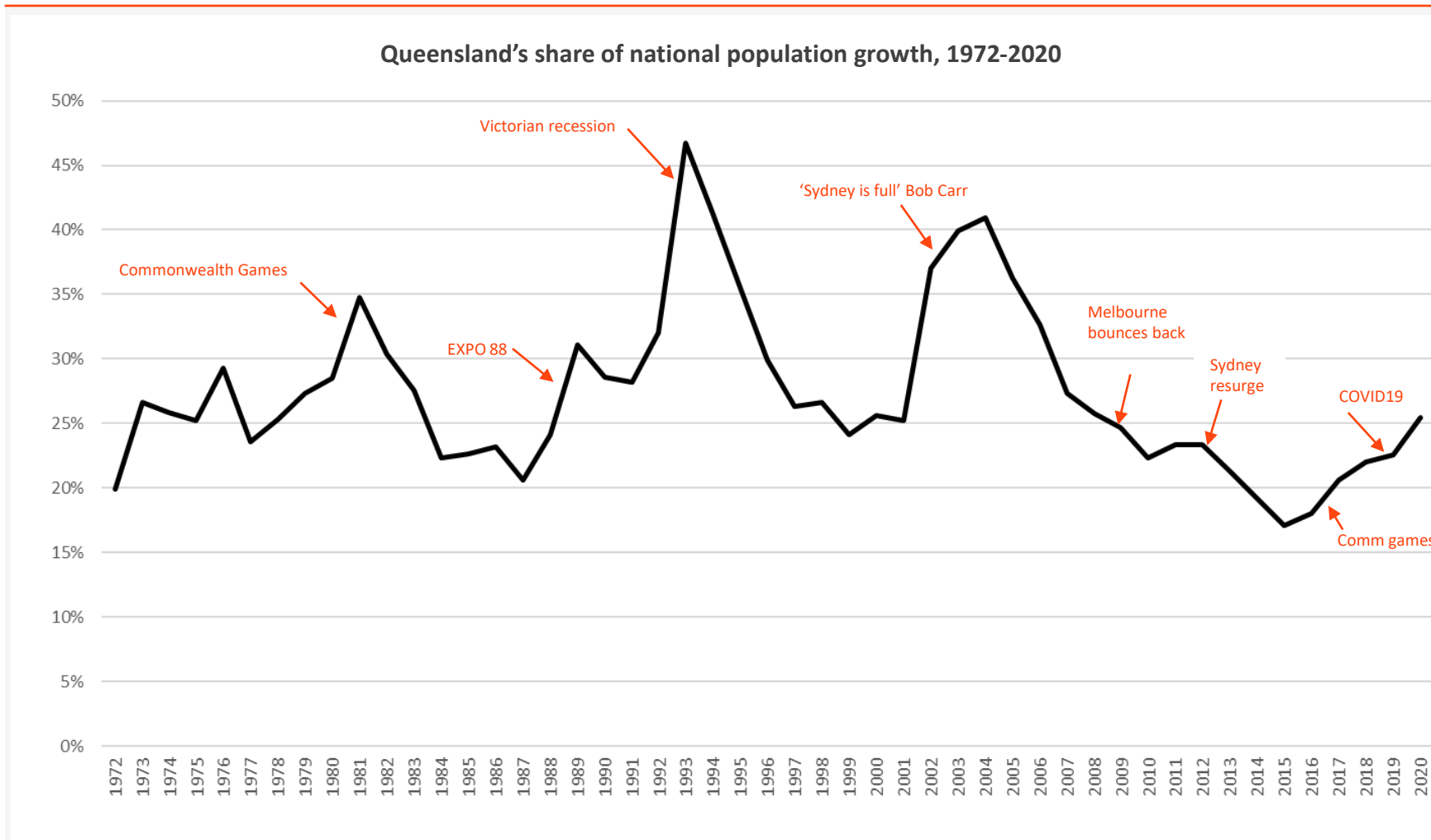
State government regional forecasts are also depressed



We forecast a strong recovery in overseas migration



Queensland's growth is cyclical and closely linked to other parts of Australia



What's driving regional growth?



COVID-19 Impact Assessment Framework

Supporting information

Impact of COVID-19

- About the forecasts >
- Forecast methodology >
- Site map
- Sign in

Other resources

- Latest updates
- Related sites
- Training videos
- Help centre
- NatI Demographic Indicators
- NatI Economic Indicators
- Resource centre
- Blog
- Understand liveability in your LGA
- Gender equity analysis

- can offer unique ambiance and lifestyle, with some areas attractive to 'tree changers' and as well as niche tourism opportunities; and
- provide affordable housing compared to major regional cities and capital cities.

Potential impacts on rural areas

Based on our understanding of the characteristics of rural areas, we consider the following to be likely impacts on population growth. These insights are not necessarily specific to the Griffith City, but reflect challenges and opportunities for this type of place.

Overseas migration

Low short-term impact from the net overseas migration shock as a very low share of overseas migrants move directly to rural areas. However, some rural areas that have industries reliant on migrant workers (including temporary workers) may experience a short-term decline.

Low longer-term impact from the net overseas migration shock as a relatively low share of rural residents are born overseas compared to other regional areas. Typically, overseas migration as a contribution towards total migration is lower in rural areas compared to major regional and metropolitan cities.

Negligible impact on future international student residents. While the impact on the number of new international students will be severe nationally, COVID-19 will have a negligible impact in rural areas which do not contain universities or attract international students*

Internal migration

Interstate migration will be affected considerably in the short-term, due to border closures and economic uncertainty. Areas which typically experience net out-migration to other States will retain more residents, while cities which typically experience net in-migration will not gain as many new residents.

Intrastate migration Typically, rural areas attract new residents from other areas within the State, particularly from capital cities. Levels of net in-migration could increase under COVID-19, particularly for rural areas in closer proximity, with strong transport linkages and relatively short commuting times to major regional and metropolitan cities.

Natural increase

Births are likely to be fewer in the short-term as fertility typically declines in times of economic uncertainty. Rural areas tend to have relatively high levels of fertility and forecast births and as a result may be impacted more than other areas. However, due to the economic resilience of rural areas this impact may be mitigated.

Deaths caused by COVID-19 are currently at very low levels. This is due to low overall case numbers, however, the number of deaths could increase if case numbers increased in areas with vulnerable, elderly residents. Generally, rural areas have relatively higher shares of residents aged over 70 years and therefore a higher mortality exposure compared to other areas.

Economic resilience

Majority of jobs in (resilient) primary and secondary industries means rural areas will experience less overall job loss, compared to other areas with more jobs in tertiary industries (retail trade, education, accommodation and food services). However, exposure may increase if a town is home to a sole employer that is experiencing a downturn in revenue due to COVID-19.

Relatively small decline in employed residents means rural areas may retain (even attract in some LGAs) more residents. Generally rural areas have large numbers of residents working in their respective LGAs in agriculture and manufacturing (primary and secondary industries).

Resident vulnerability

COVID-19 will increase the likelihood of housing relocation among households who are already vulnerable due to factors such as, unemployment or insecure work, low income, and rental or mortgage stress.

Moving house could affect household formation in several ways including: younger residents moving back home with their parents, elderly residents moving in with their children (as dependants), formation of group households and other larger households to share housing costs. This could also mean that rural areas may experience some inflow of previous residents (young and vulnerable adults) who may move back to the family home for

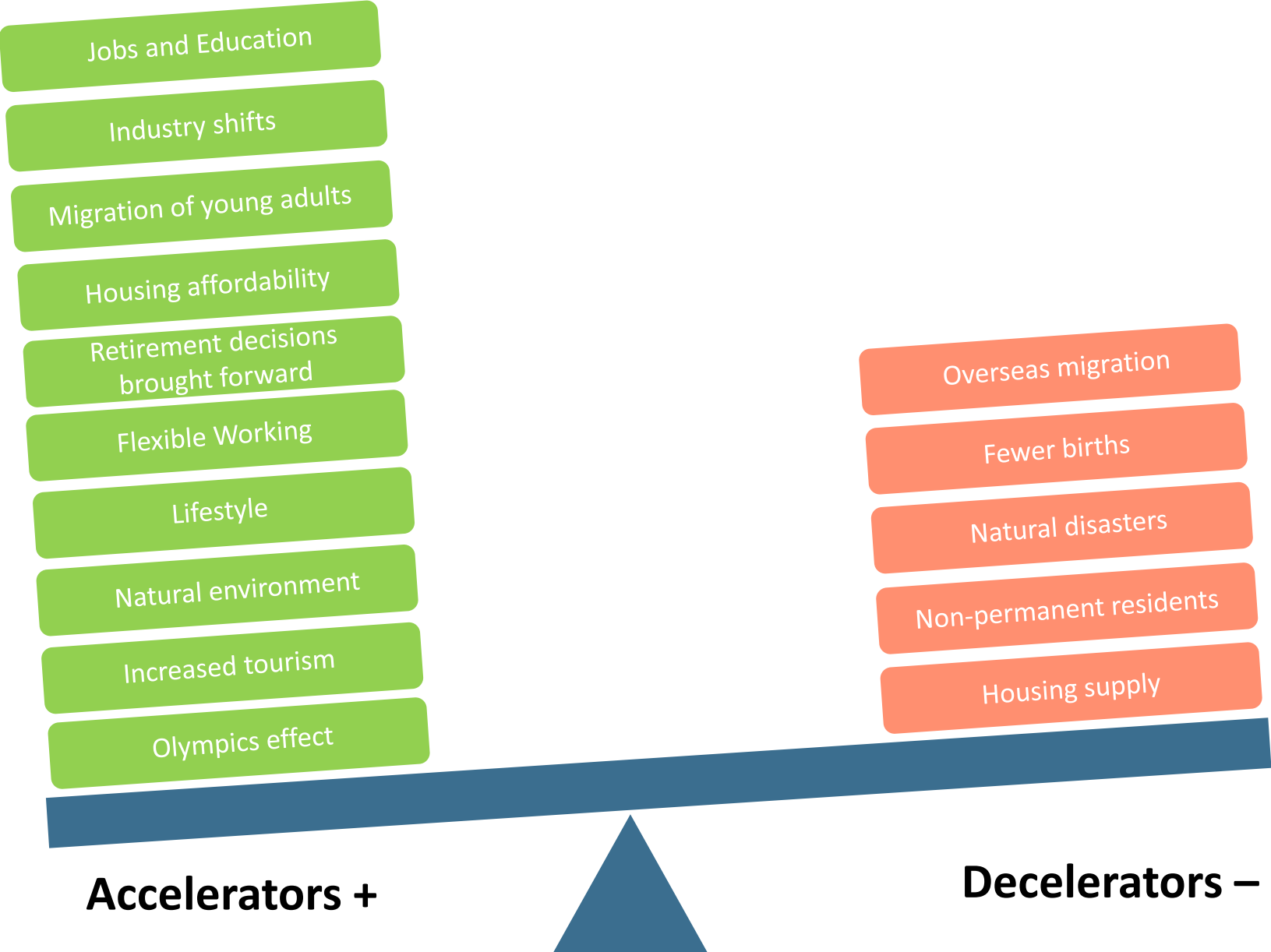
Local amenity

Availability of lifestyle opportunities including access to open space and natural environment. A large number and diversity of lifestyle opportunities can draw residents to rural areas.

Access to affordable quality accommodation means that rural areas will attract new residents from regional and capital cities, which have comparatively more expensive housing.

A range of land uses including farming, forestry, cropping and to a lesser extent tourism, means that rural areas are also attractive to new residents seeking new (and sometimes speculative) ventures including, taking over the operations of family farms, farm stays

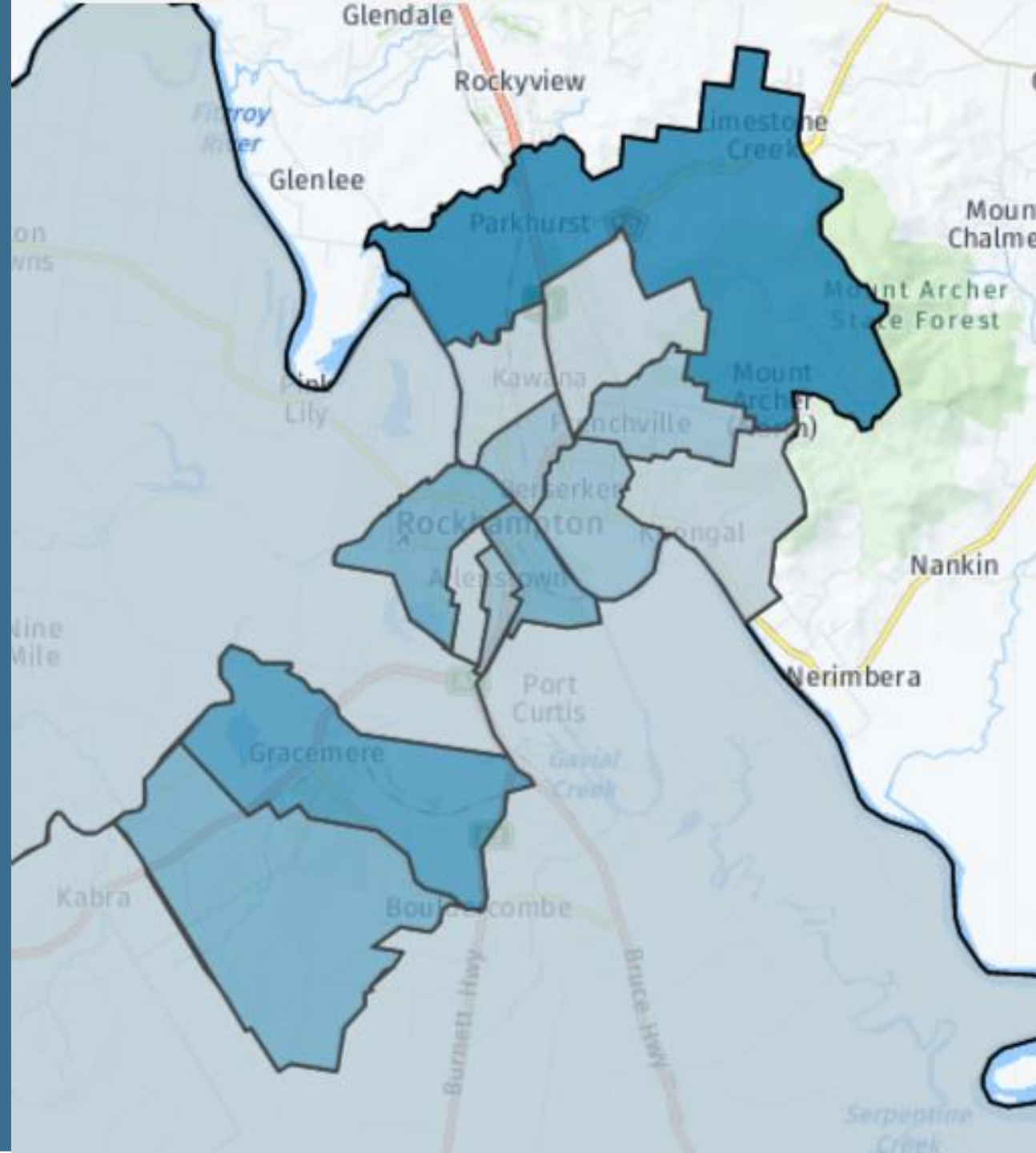
What are the drivers of regional growth?



How are we capturing these drivers?

- ✓ **Increased construction activity** due to pent up domestic demand
- ✓ **Tighter dwelling vacancy rates** due to increased demand for lifestyle
- ✓ **Tighter dwelling vacancy rates** due to short term take up of holiday homes
- ✓ **Tighter dwelling vacancy rates** due to increased demand for work
- ✓ **Larger households** due to housing stress
- ✓ **Net in-migration of young-adults** in many regional areas
- ✓ **Fewer births** in areas with higher share of younger overseas migrants

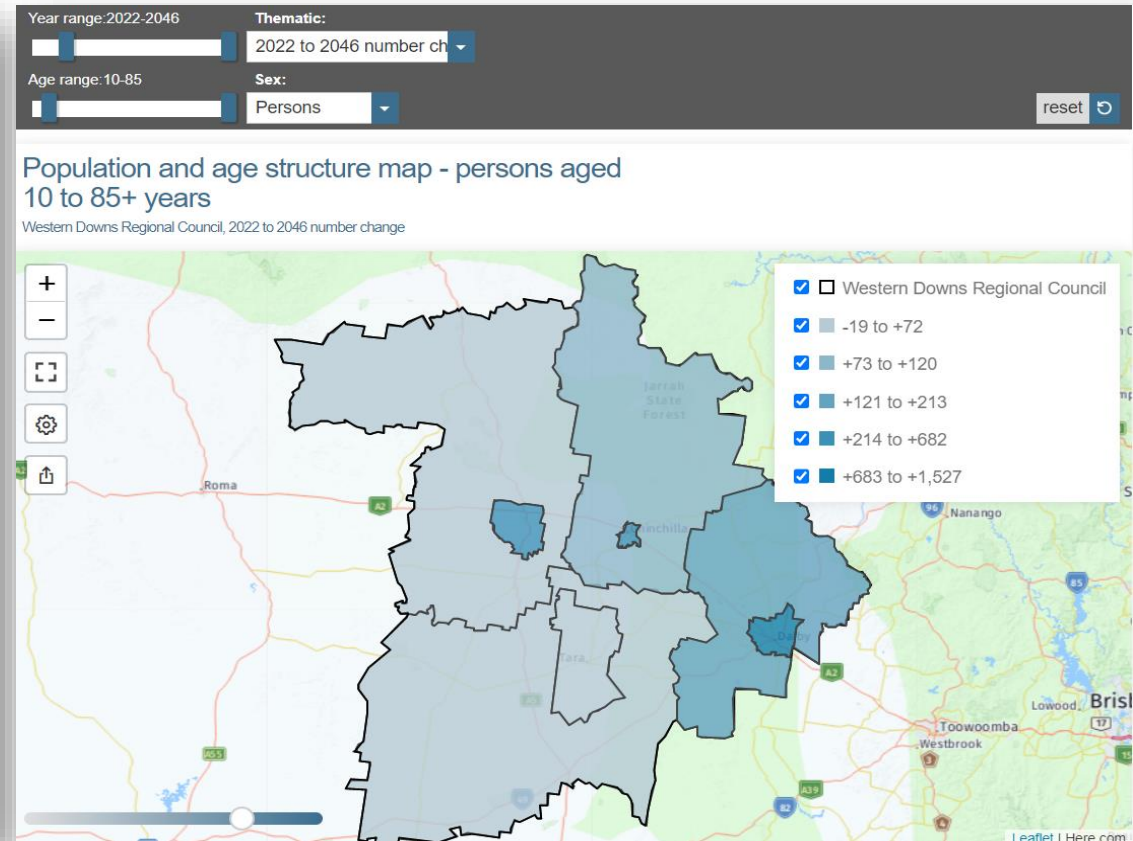
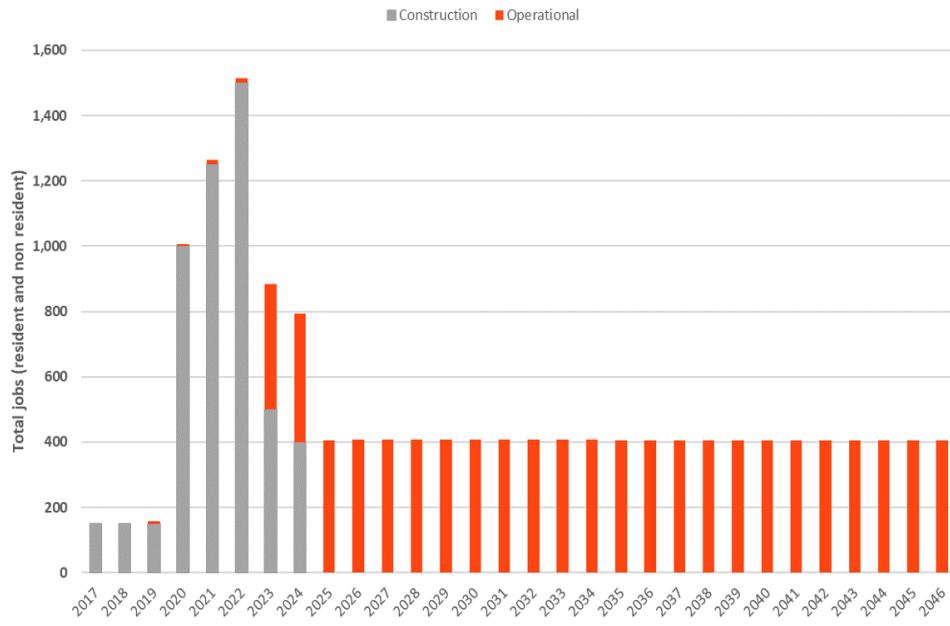
Real life examples



Western Downs: building a pipeline of growth

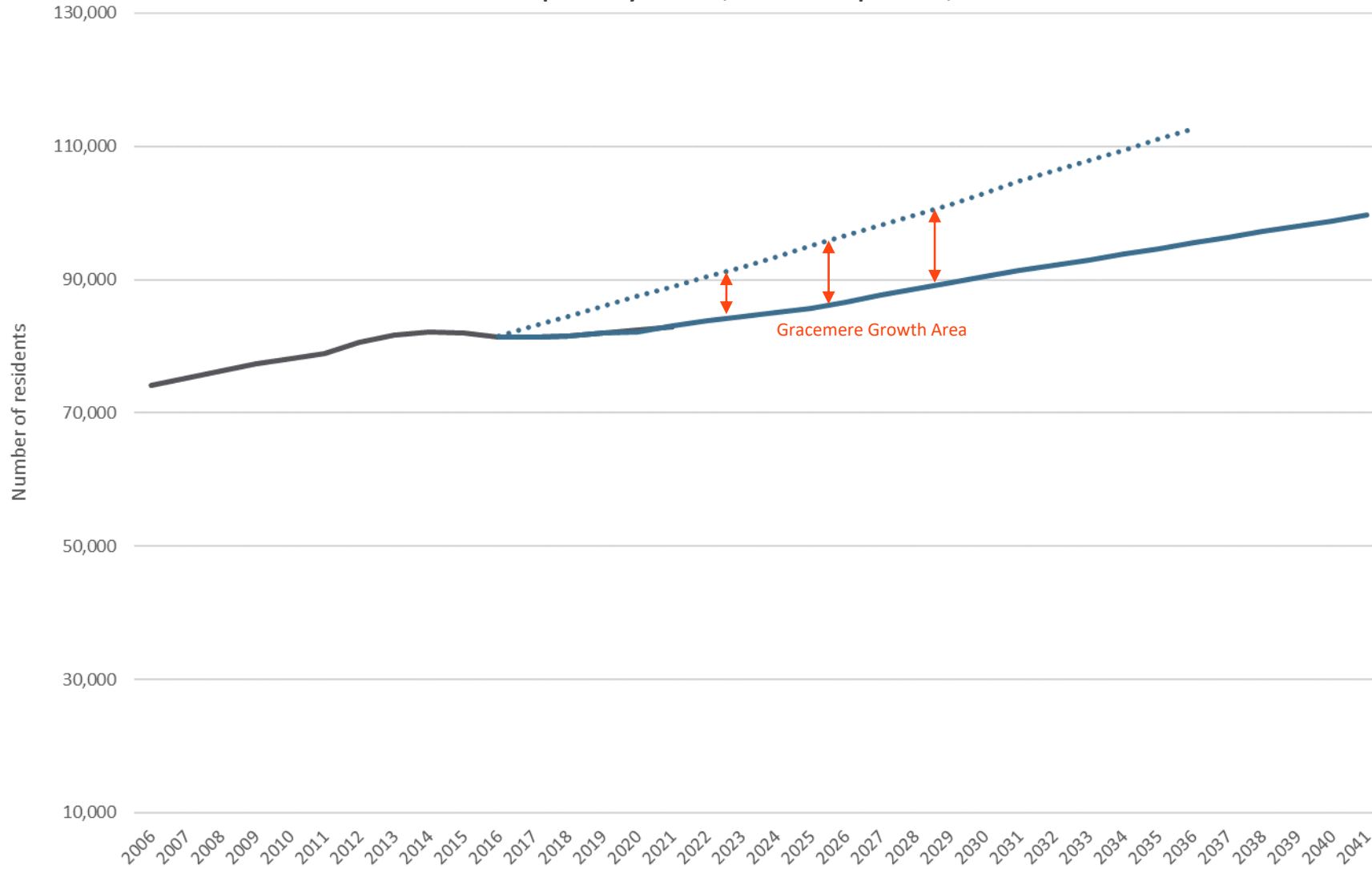
The major project pipeline

Additional jobs generated through known development pipeline for major projects, Western Downs Regional Council, 2017 to 2041



forecast.id's single scenario allows you to monitor your policies

Rockhampton City Council, Forecast Population, 2016-2020



Early Census insights

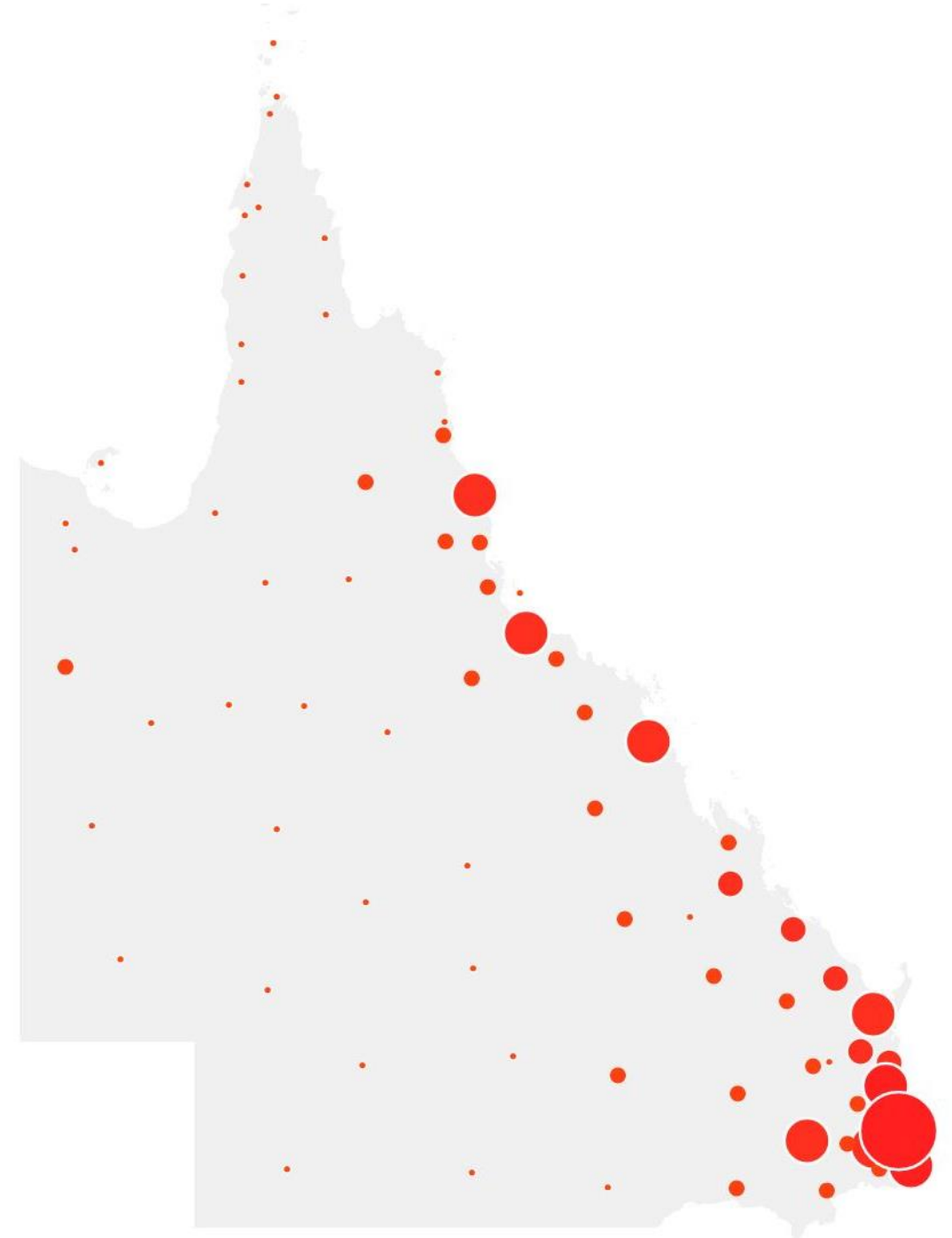


Queensland is the most decentralised state

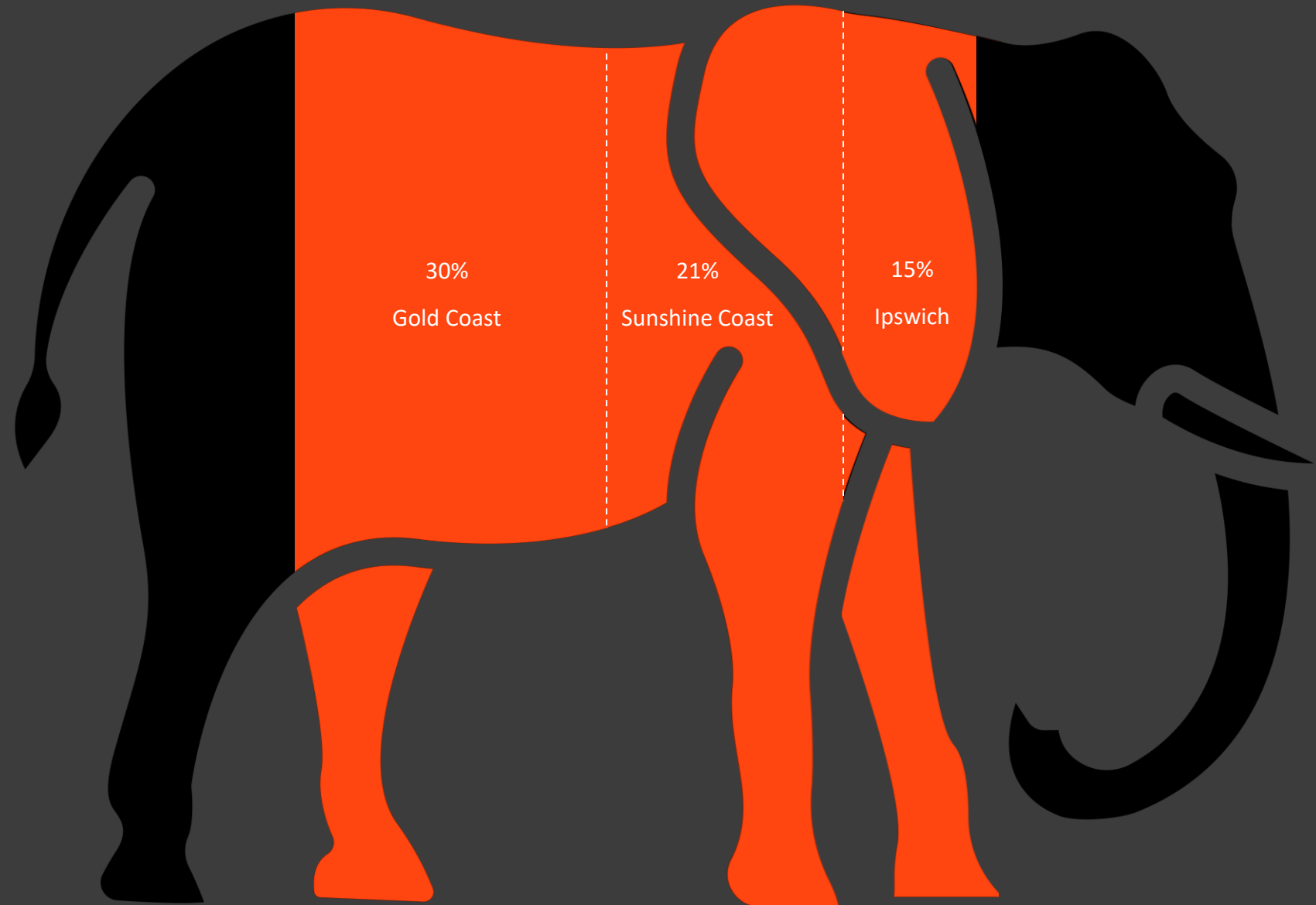
More than half of all Queenslanders live regionally

That's over 3 million people

Beware of the elephant in the room

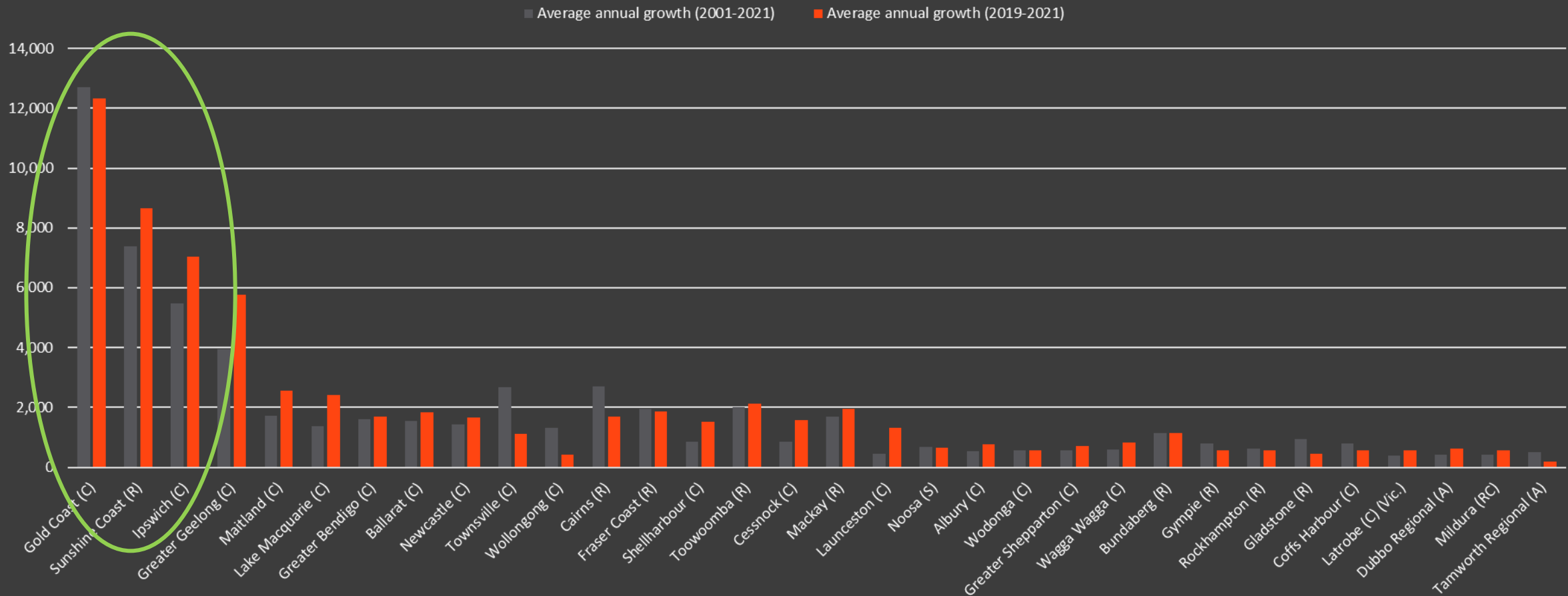


Share of regional growth



Gold Coast and Sunshine Coast and Ipswich are three fastest growing major regional cities in Australia for the past 20 years

Annual population change, Major Regional Cities, 2001-2021



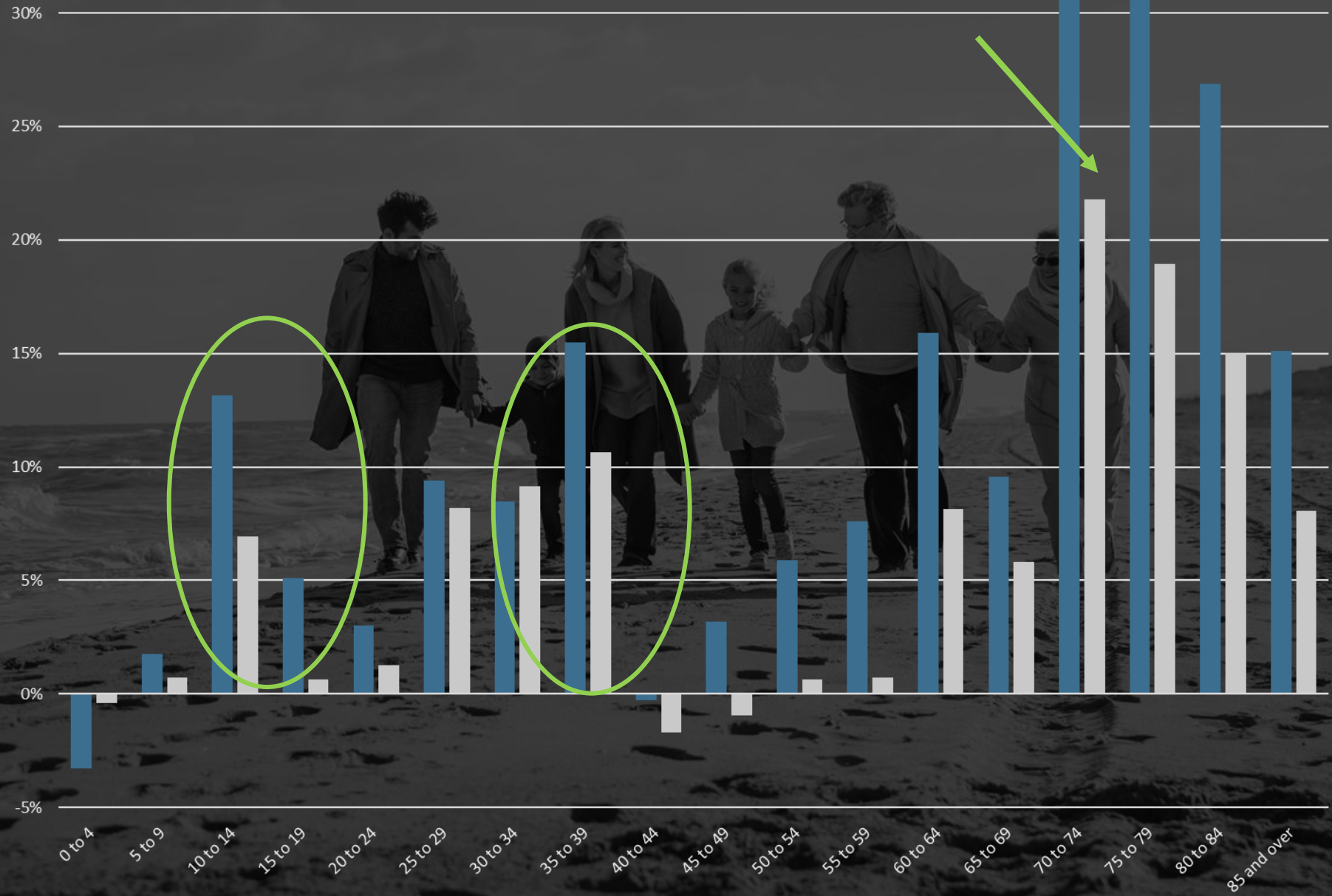
Age structure

Strong growth in young adults, families, and older age groups



Change in residents by age (%), regional Queensland, 2016-2021

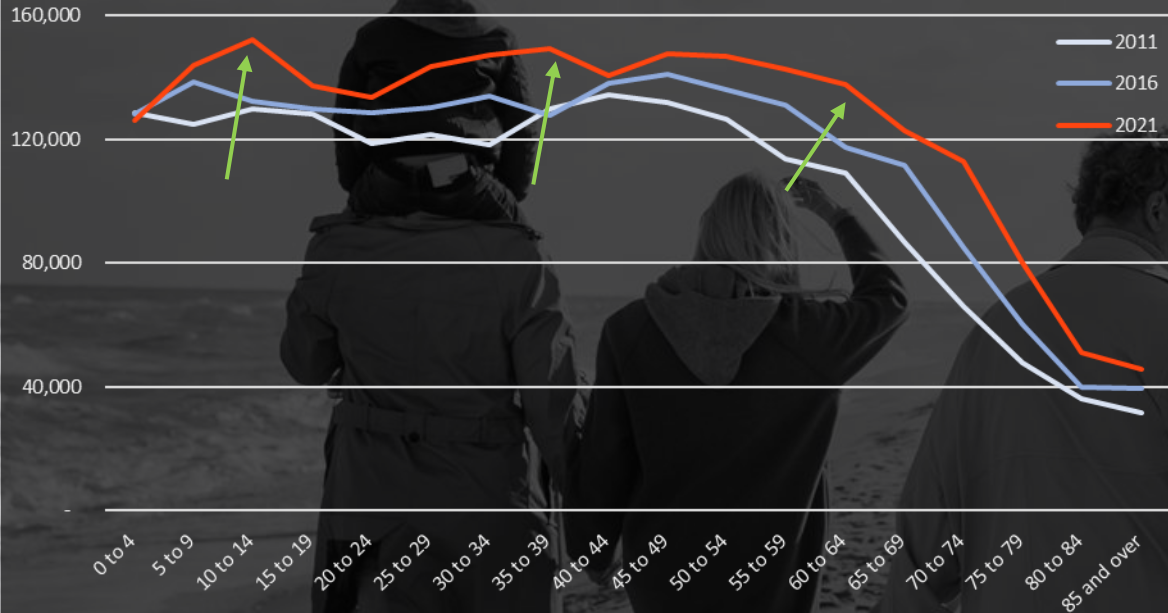
■ Regional Queensland ■ Rest of regional Australia



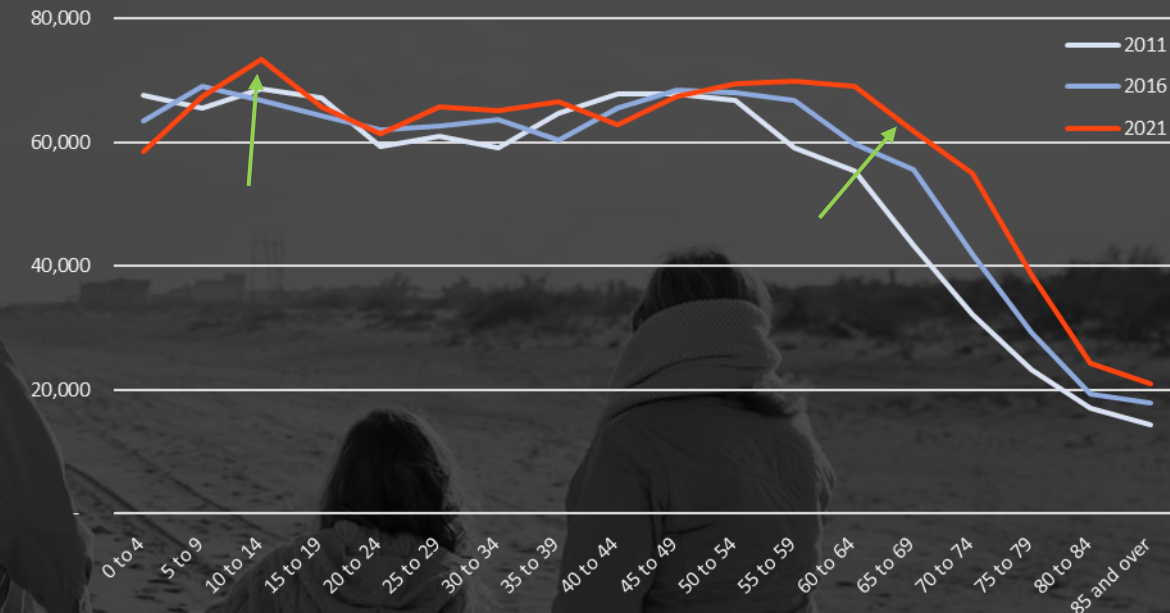
With older children outgrowing the rest of regional Australia

However, growth is nuanced in regional Queensland areas

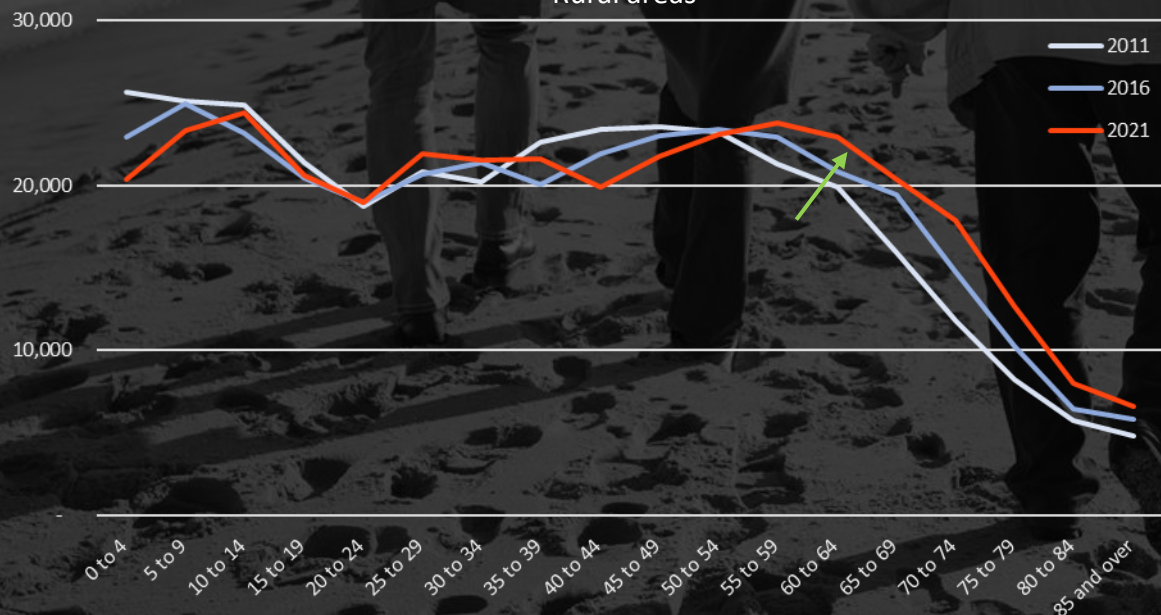
Major regional cities



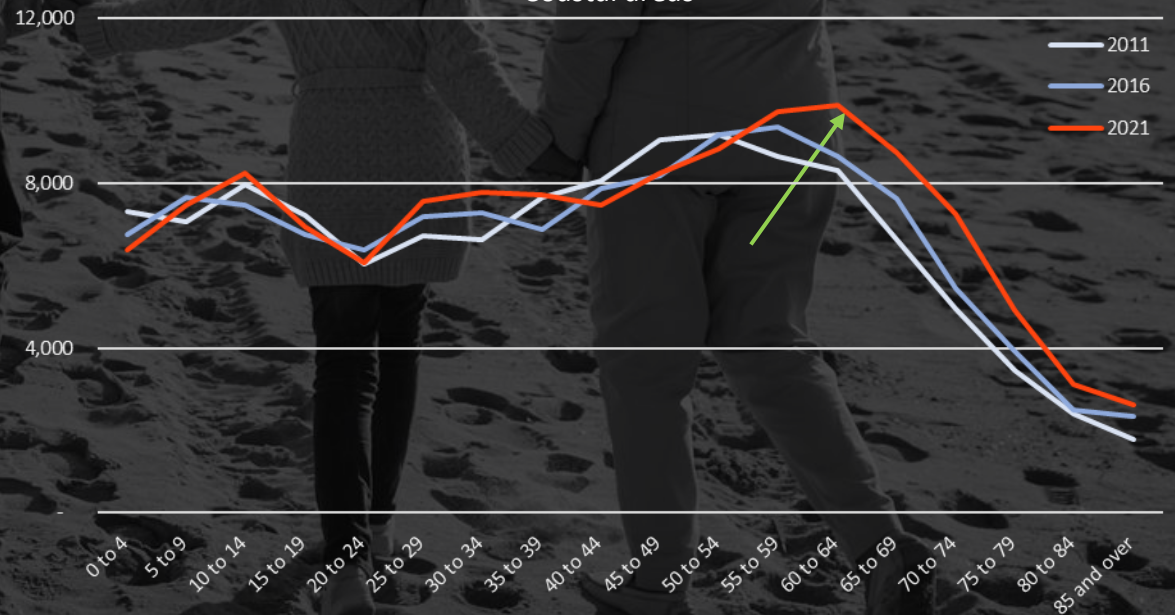
Major regional cities excl Gold Coast, Sunshine Coast & Ipswich



Rural areas



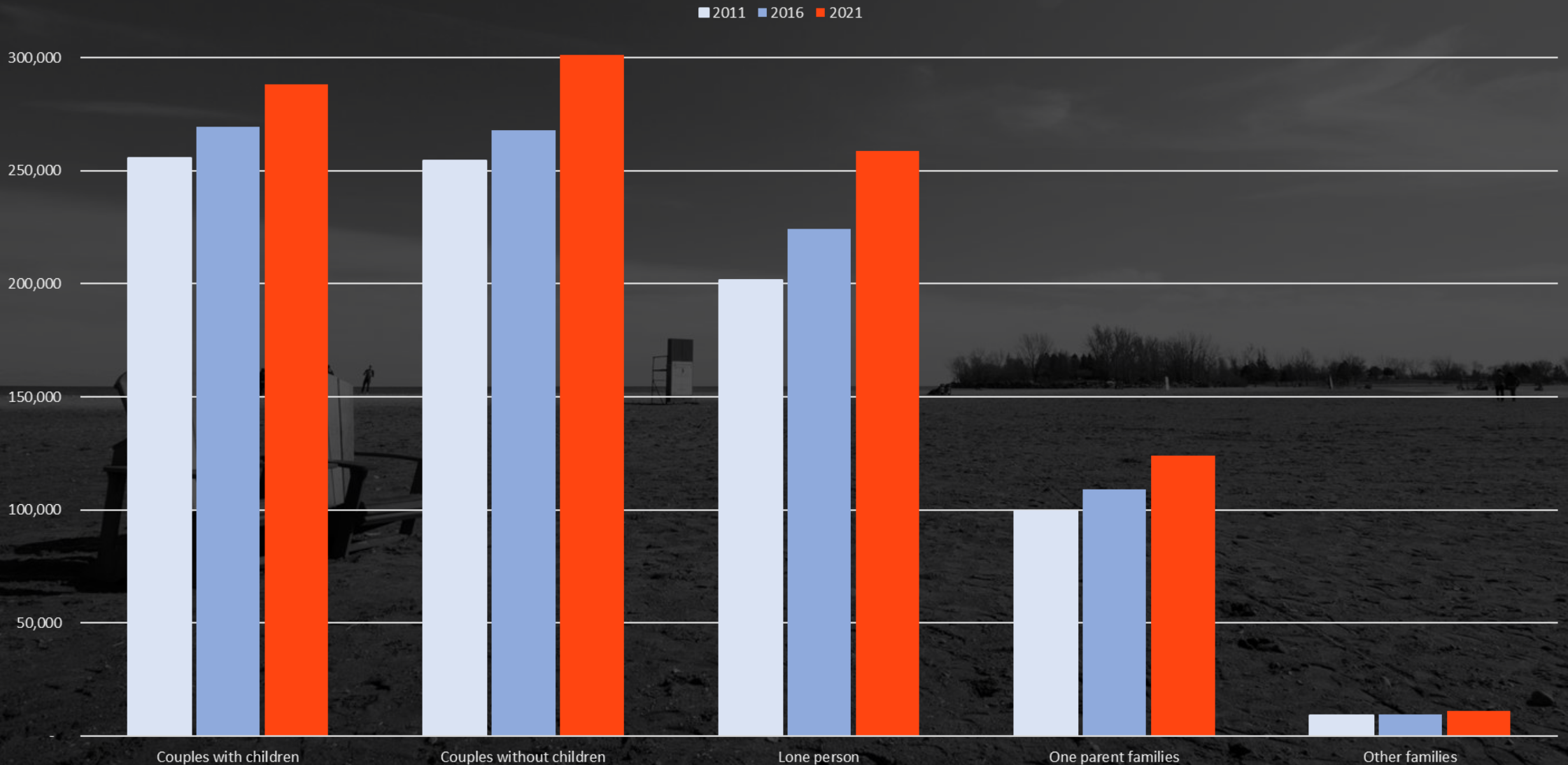
Coastal areas



Households

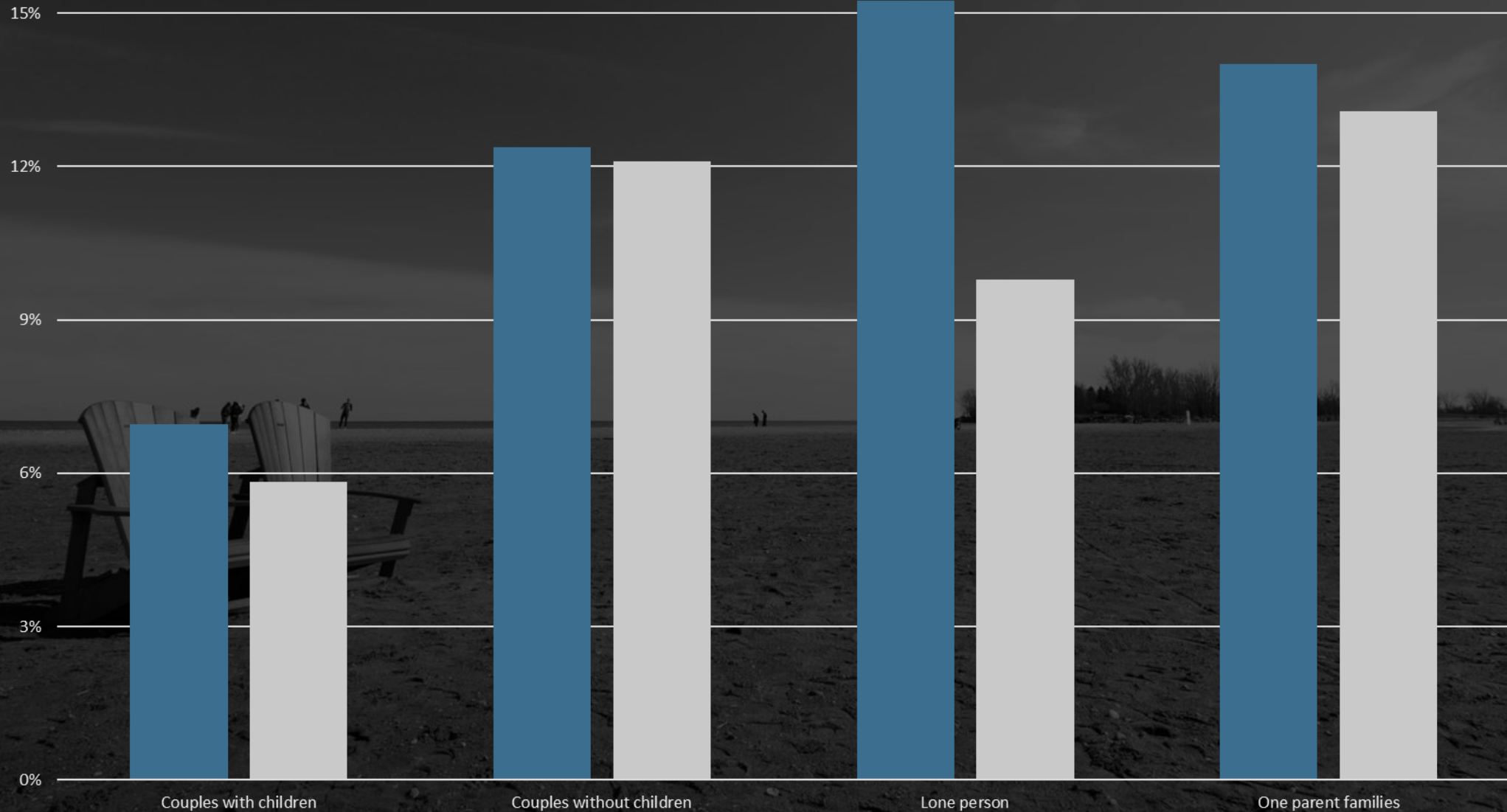
Couples without children is now the number one household type

Number of households by type, regional Queensland, 2021-2021



As lone person households accelerates faster than the rest of regional Australia

Change in household types (%), regional Queensland , 2016-2021

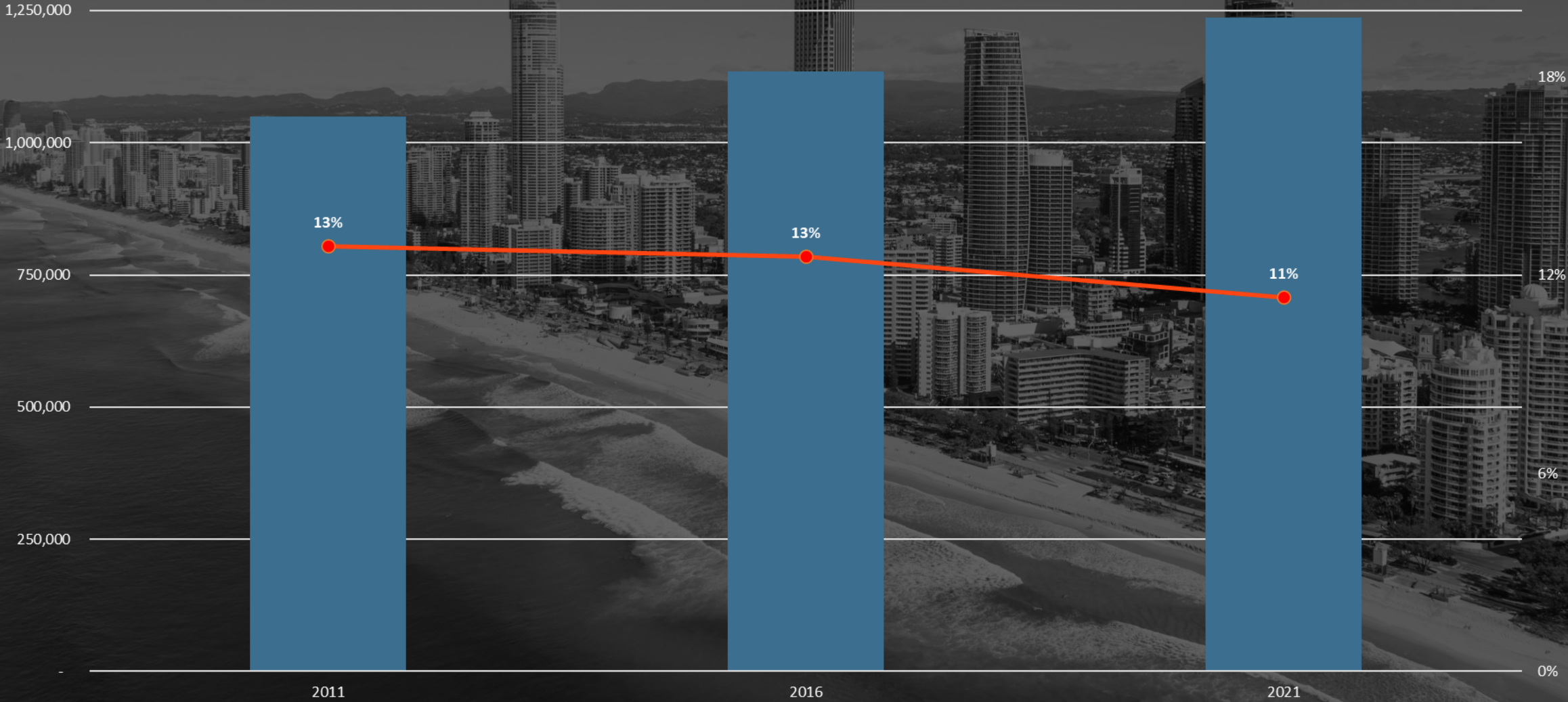


Dwellings

Construction continues, while vacancies fall to tightest levels in regional Australia

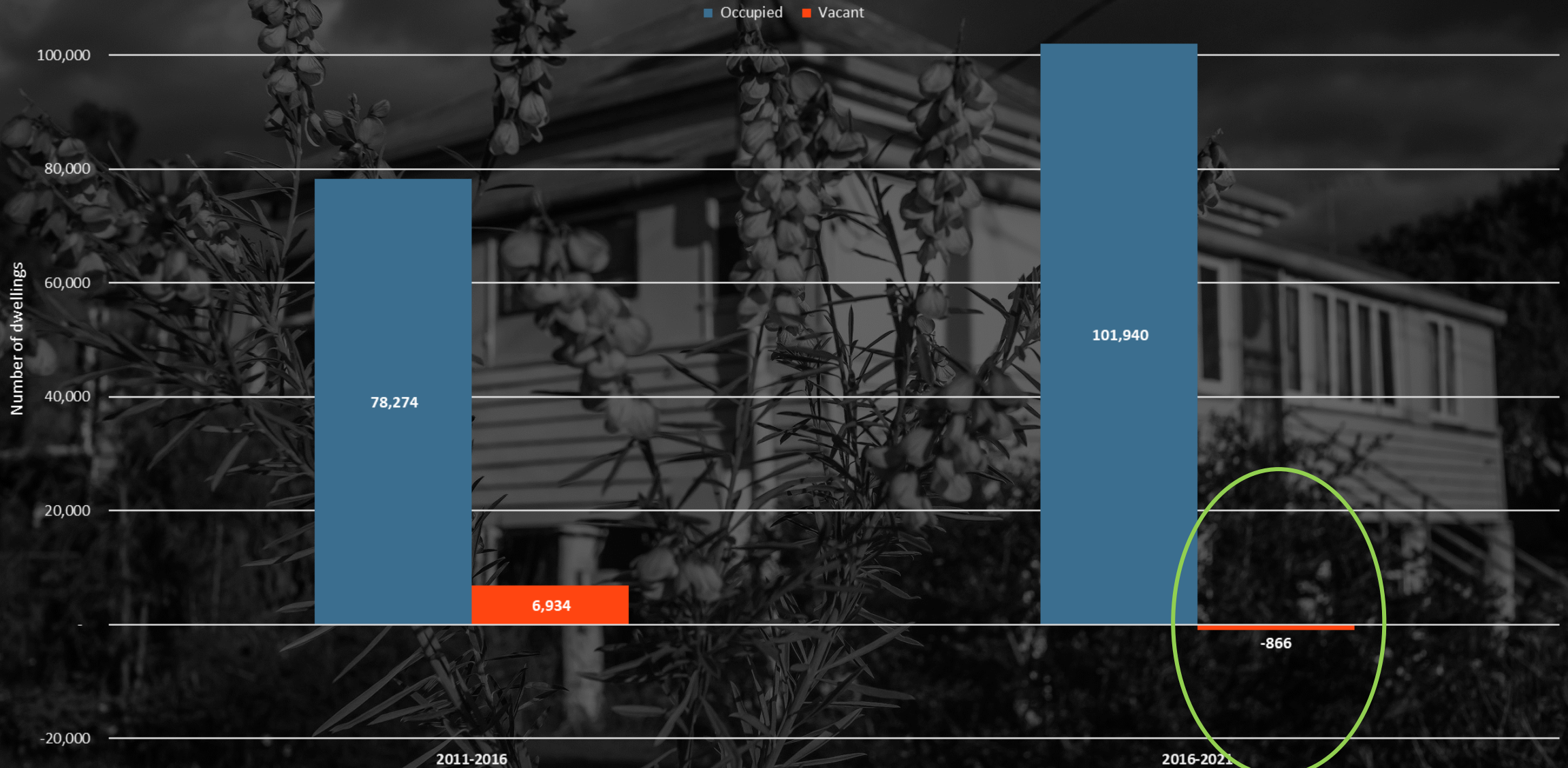
Private Dwellings, regional Queensland, 2011-2021

Dwellings Vacancy rate



Driven by an actual reduction in number of vacant dwellings

Change in dwellings, regional Queensland, 2011- 2021



Vacancies fell in most places

Change in vacancy rate, regional Queensland, 2011- 2021



Key insights

- ✓ **Very strong growth in families** (and young adults) will demand quality services, education and jobs
 - ✓ **Aging in place** means even more focus on services and infrastructure for an even older population
 - ✓ **Quality housing choice** - Households are diversifying (*Couples without children now dominant, lone person catching up*)
 - ✓ **In the right locations** – to balance increased regional demand residential construction and vacancy rates
 - ✓ **Protect your natural environment** –natural environment is a key asset and most valued by your residents
- 

Q&A
forecast.id



Central Coast NSW



Cessnock City Council



Clarence Valley Council



Coffs Harbour City Council



Colac Otway Shire



Canberra Region Joint Organisation area



Cumberland City Council



Shire of Dardanup



City of Darebin



East Gippsland Shire



Eurobodalla Shire Council



Fairfield City



Frankston City



Fraser Coast Regional Council



City of Greater Geelong



Georges River Council



City of Glen Eira



Glenelg Shire



Golden Plains Shire



City of Gosnells



Goulburn Mulwaree



Griffith City

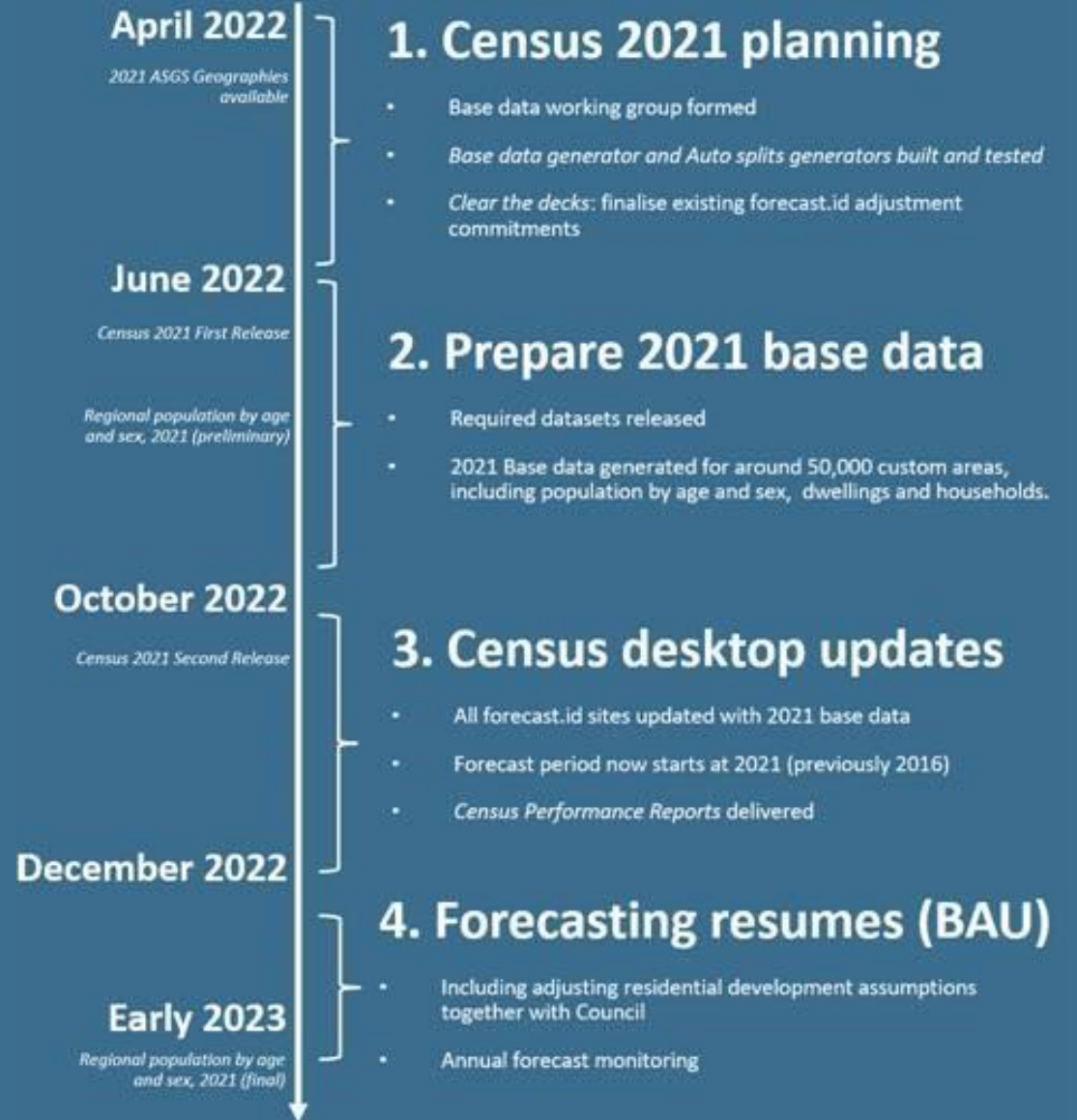


Hilltops Council area



Hobsons Bay City

Stay up-to-date with our progress to deliver the fastest Census update yet



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