



Department of Infrastructure and Planning

Recent population trends and future challenges: it's no longer business as usual

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Griffith University 2009 Seminar Series

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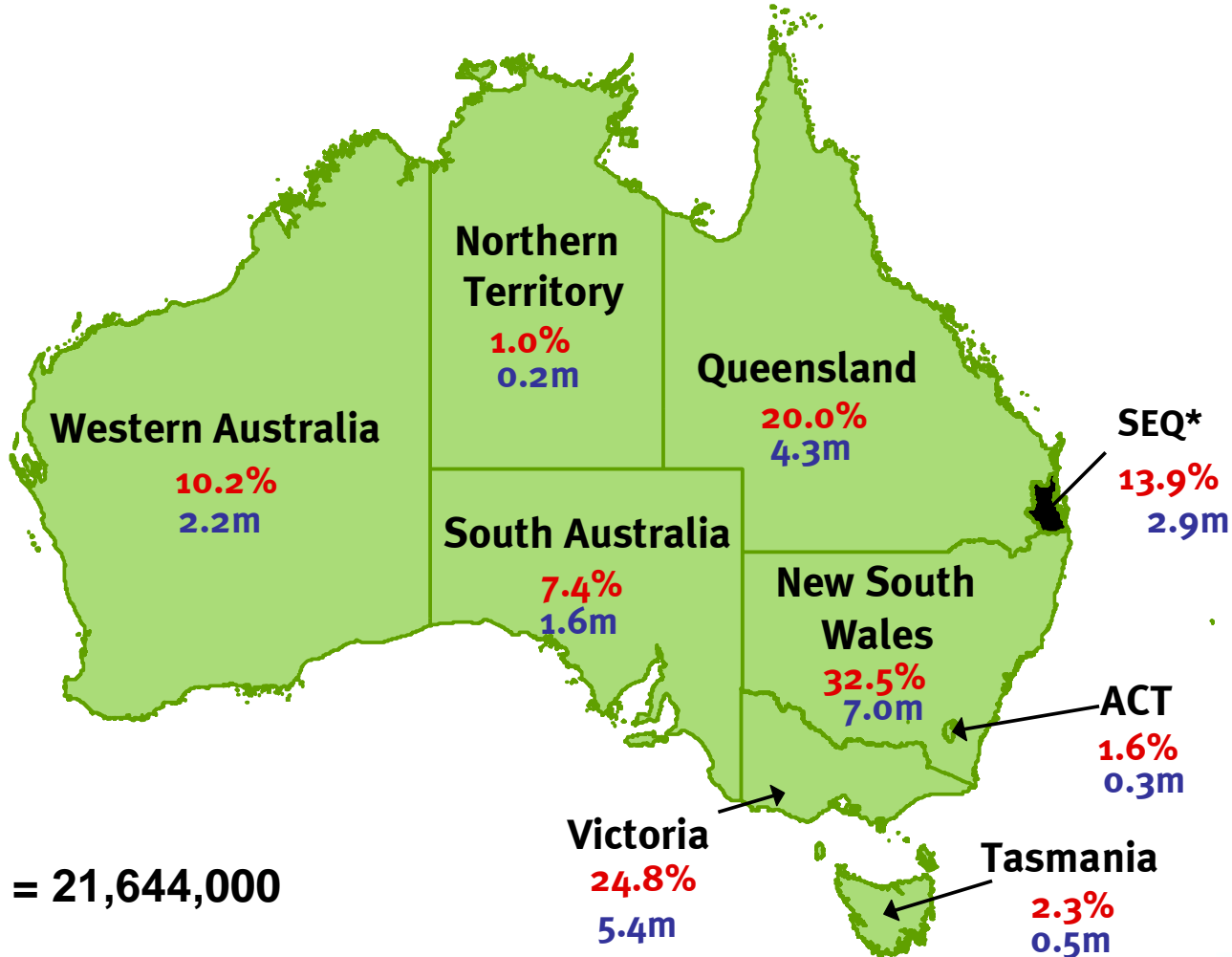




Outline

- Recent trends in
 - births
 - deaths
 - migration
 - population growth.
- Future population growth, distribution and characteristics
 - Areas of growth
 - Available land supply
 - Ageing of the population
 - Changing household structures

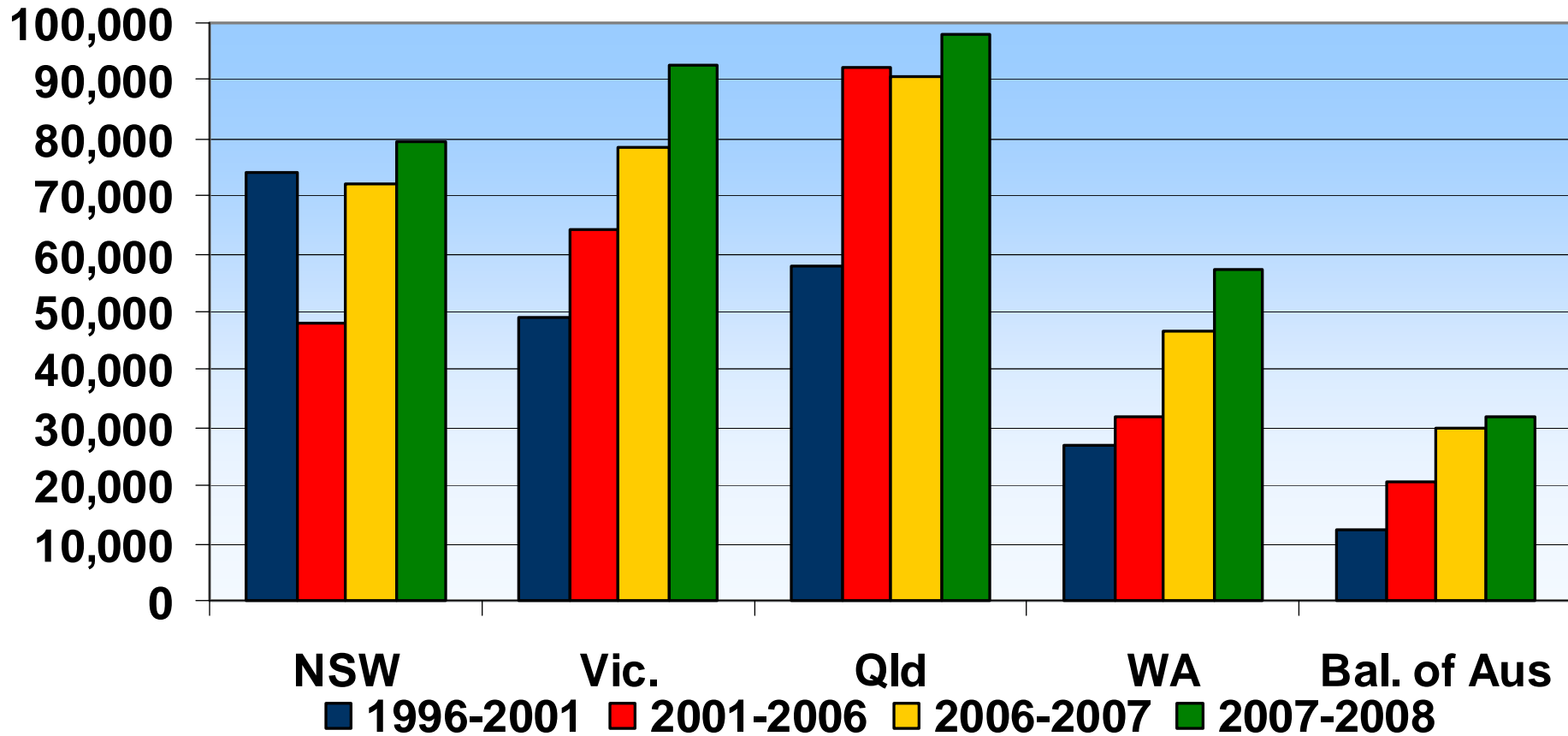
Australia's population, by state and territory, December 2008



Australia = 21,644,000

Queensland – growing more than NSW or Victoria

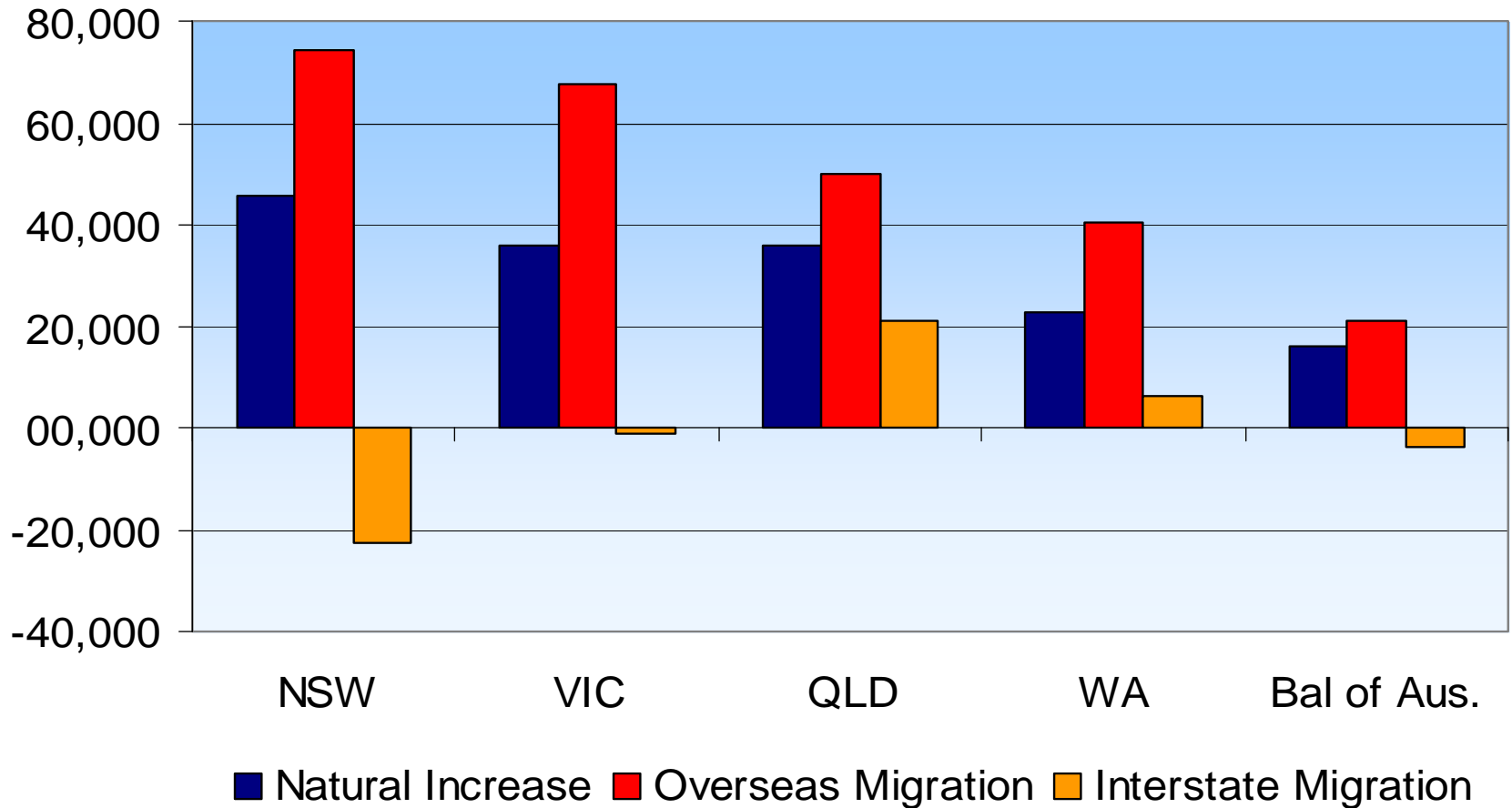
average annual change, years ending June





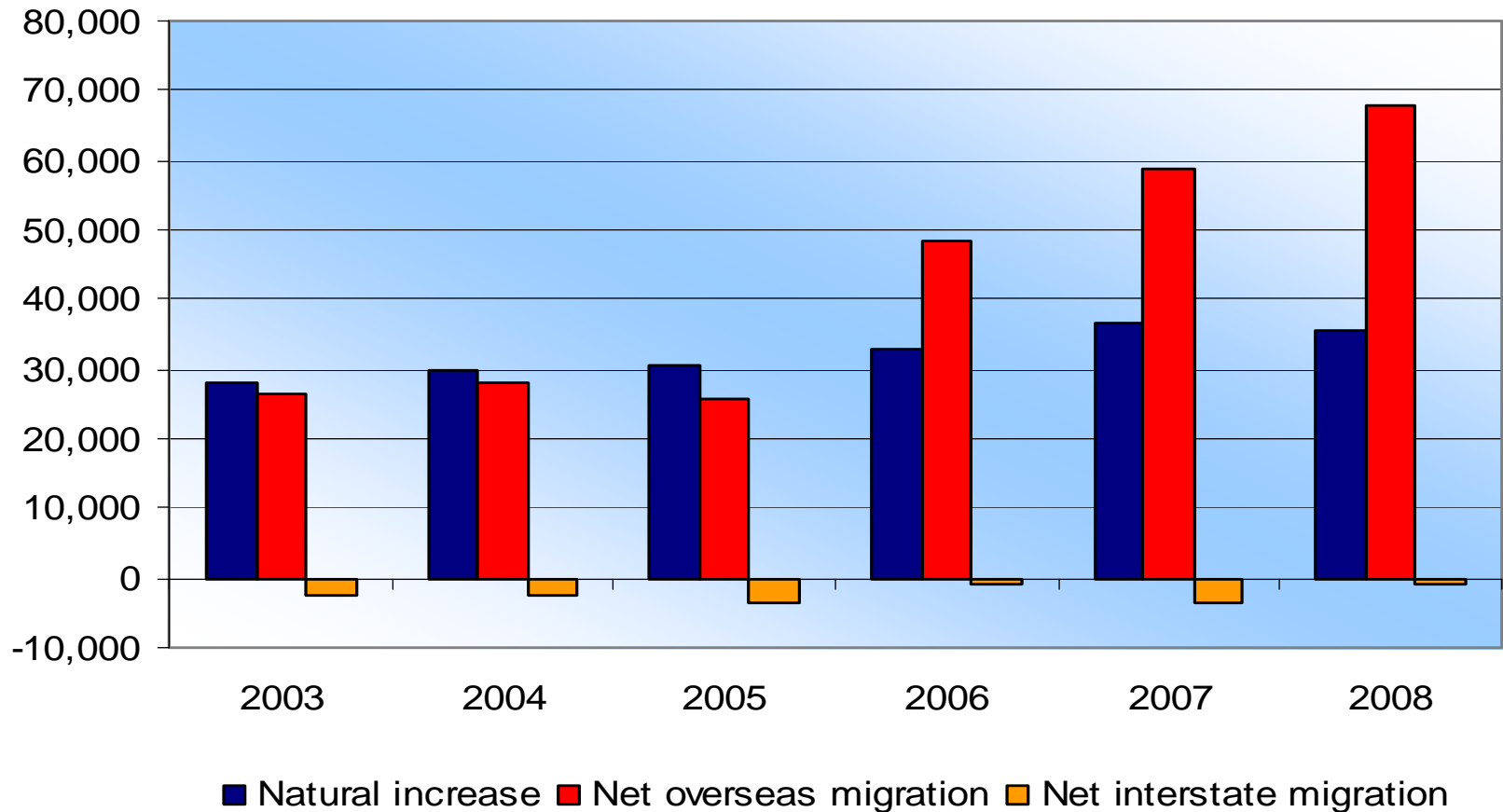
Combinations of different factors are behind each state's growth

year to December 2008



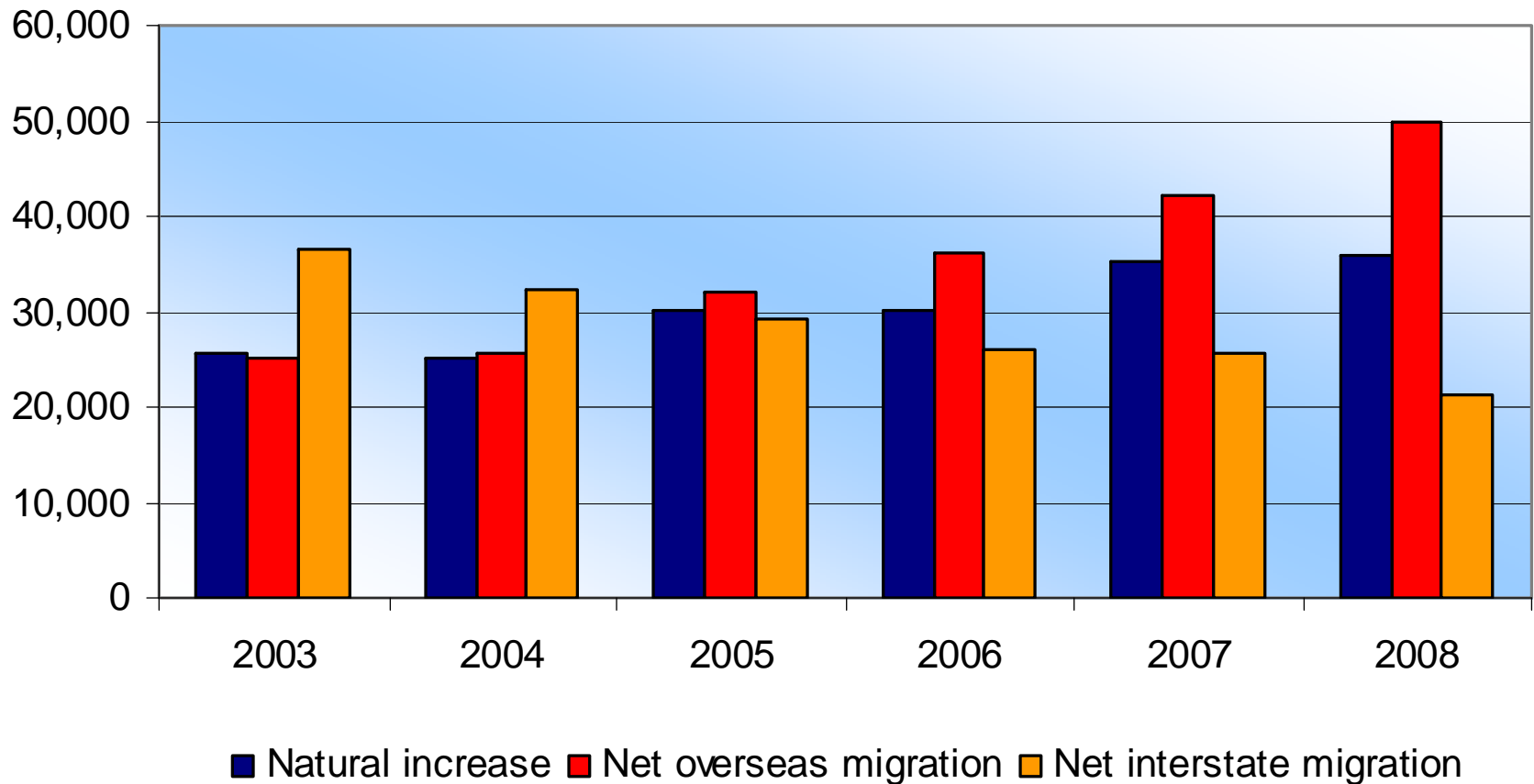


Changing components of growth, Victoria, 2003-2008

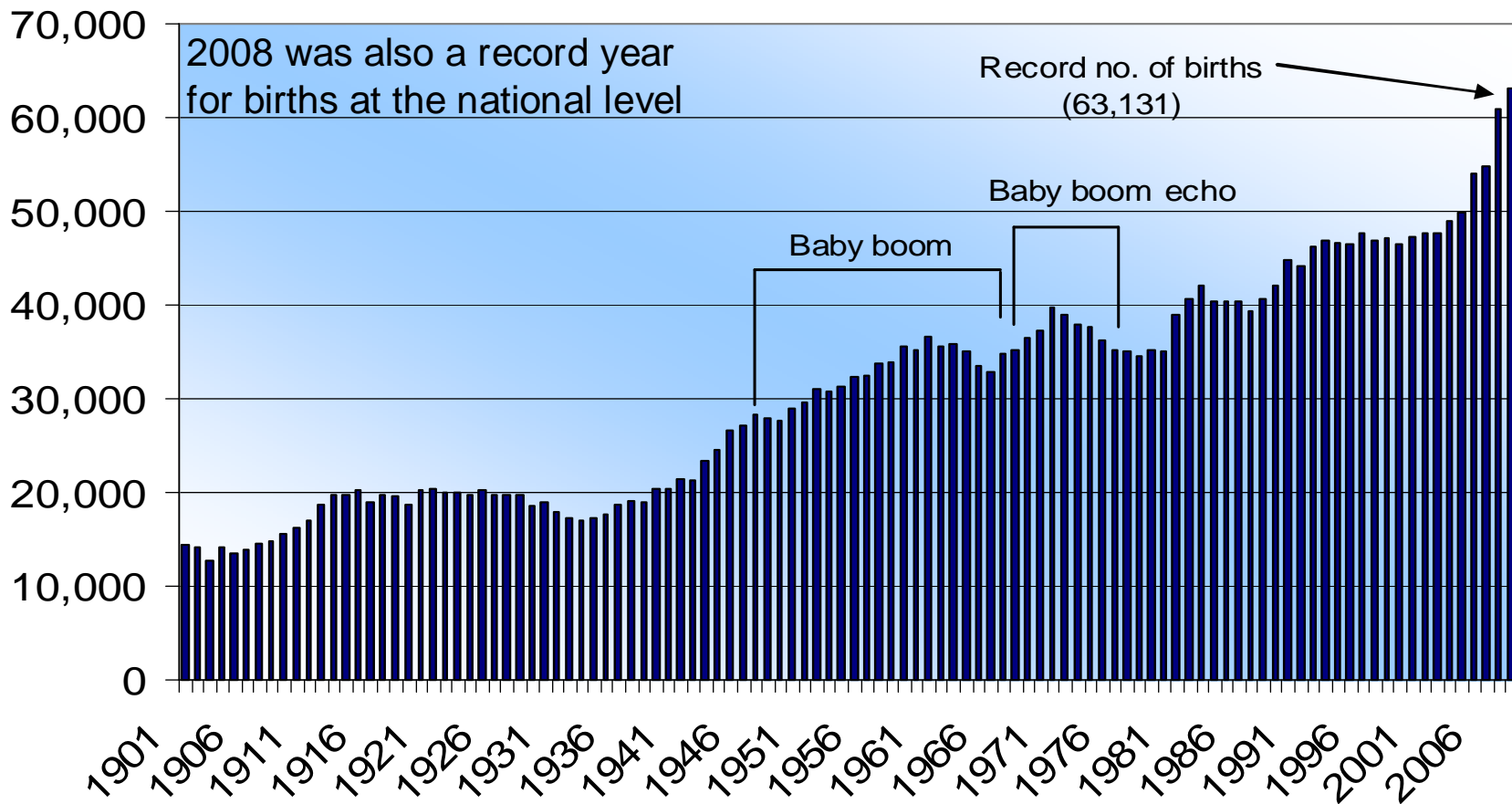




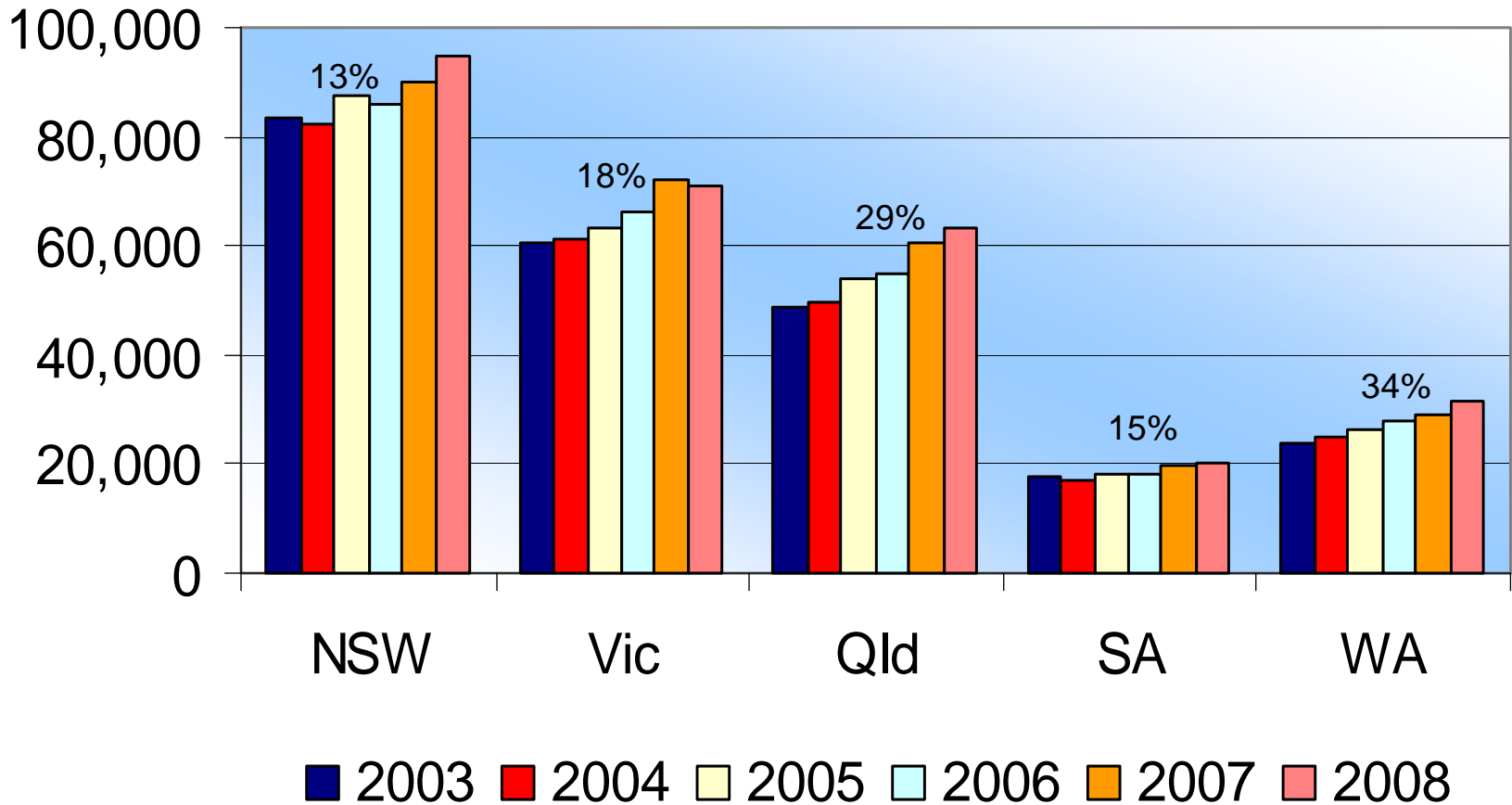
Changing components of growth, Queensland, 2003-2008



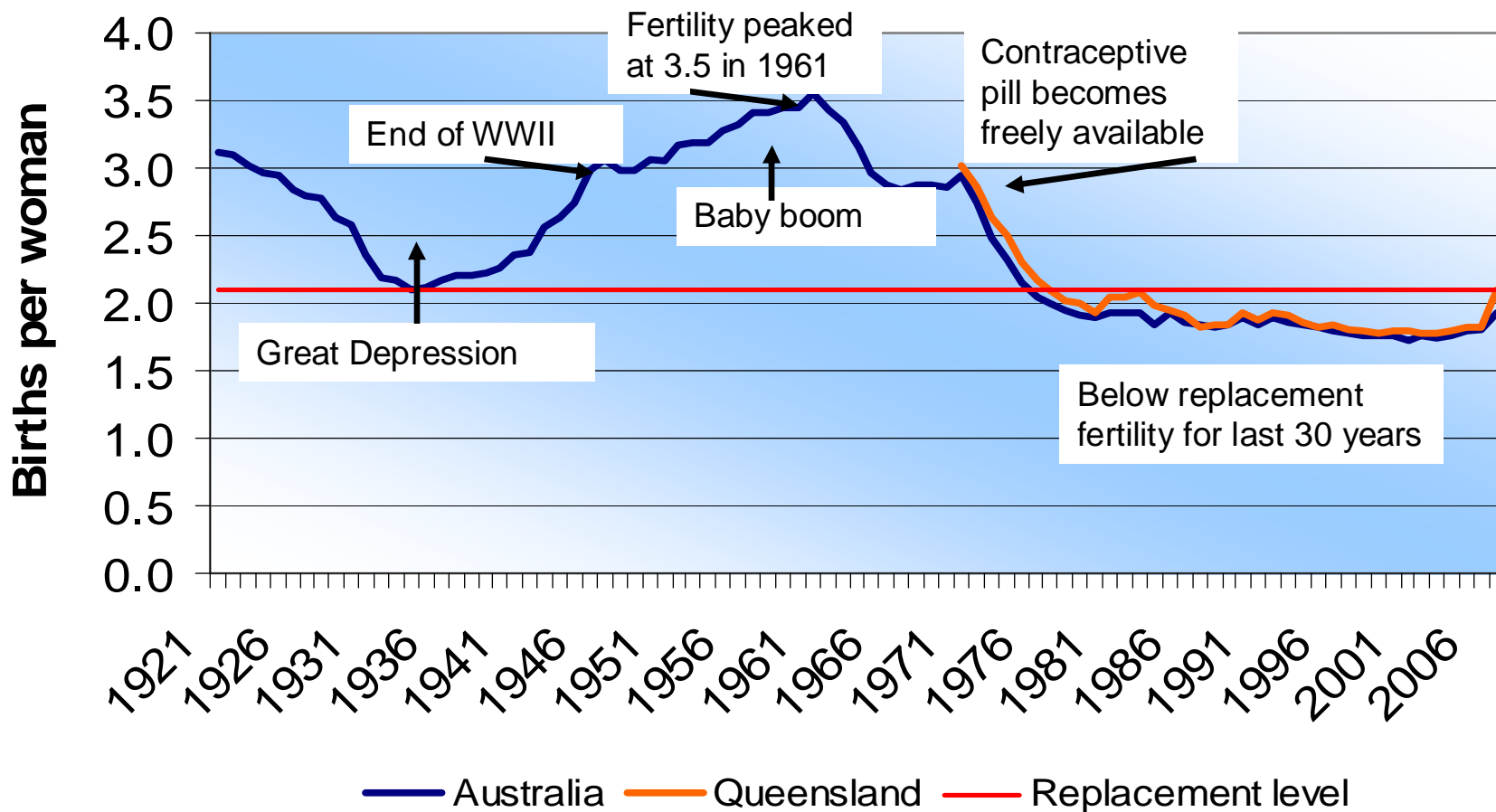
Births, Queensland, 1901-2008



Births have increased substantially in all states over the last five years



Longer term patterns of fertility

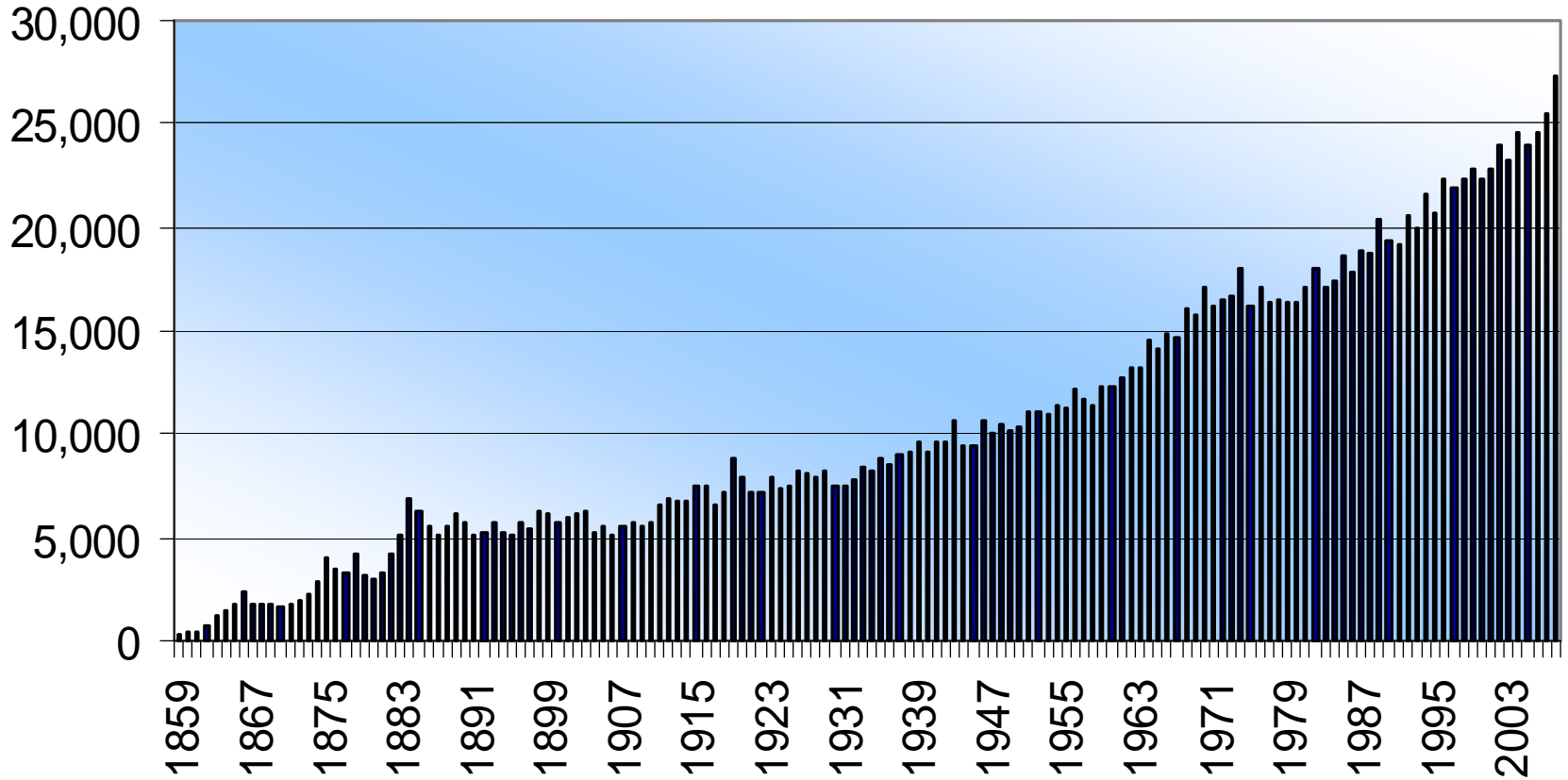




The impact of the pill in Australia...

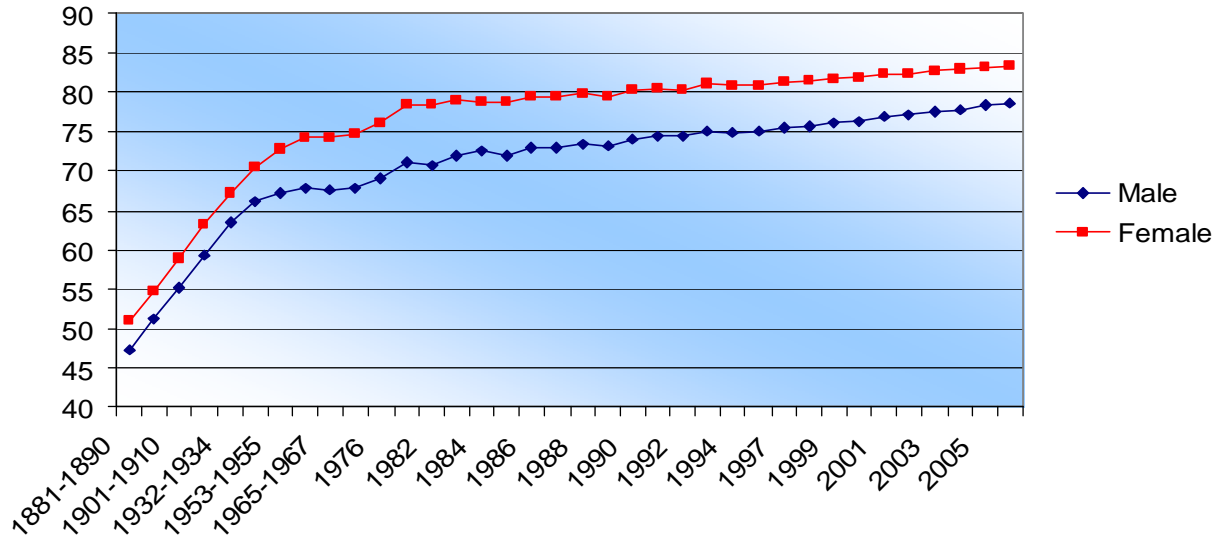
The oral contraceptive pill was released in Australia in 1961 and for a time Doctors would only prescribe it for married women. By the mid-1970s however, the pill had become the most widely used method of contraception in Australia and Australian women were the highest users in the world. (Taking precautions: the story of contraception, Powerhouse Museum Sydney).

Deaths, Queensland, 1859-2008



Life expectancy at birth, Queensland

- 1881-1890 males – 47.2 females - 50.9 (Australia)
- 1920-1922 males – 59.2 females – 63.3 (Australia)
- 1946-1948 males – 66.1 females – 70.6 (Australia)
- 1971 males – 67.8 females – 74.7
- 1991 males – 74.4 females – 80.5
- 2001 males – 76.9 females – 82.3
- 2006 males – 78.5 females – 83.4



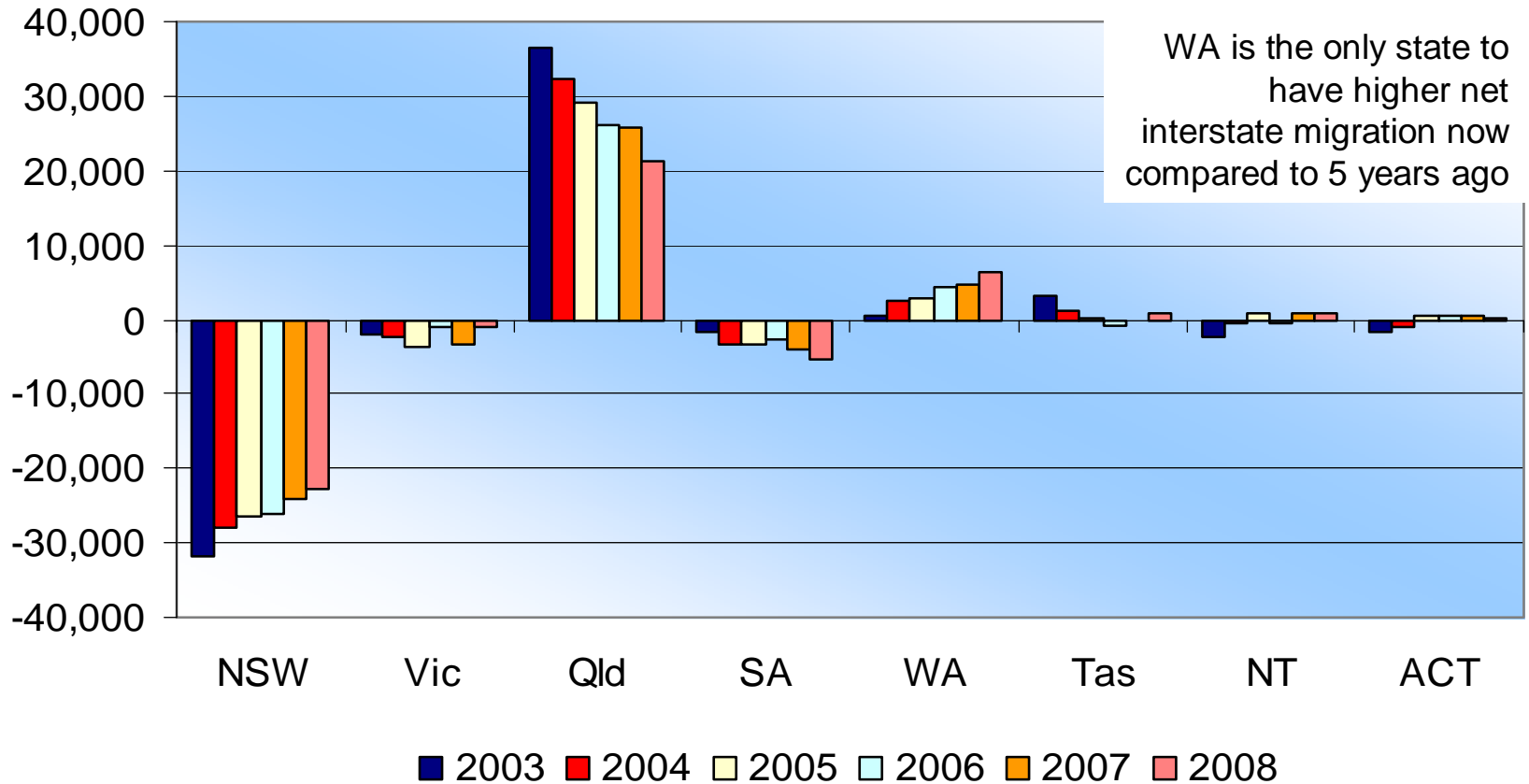
Source: ABS Cat no. 3105.0.65.001
 Australian historical population
 statistics and ABS Cat no. 3302.0
 Deaths Australia, various editions



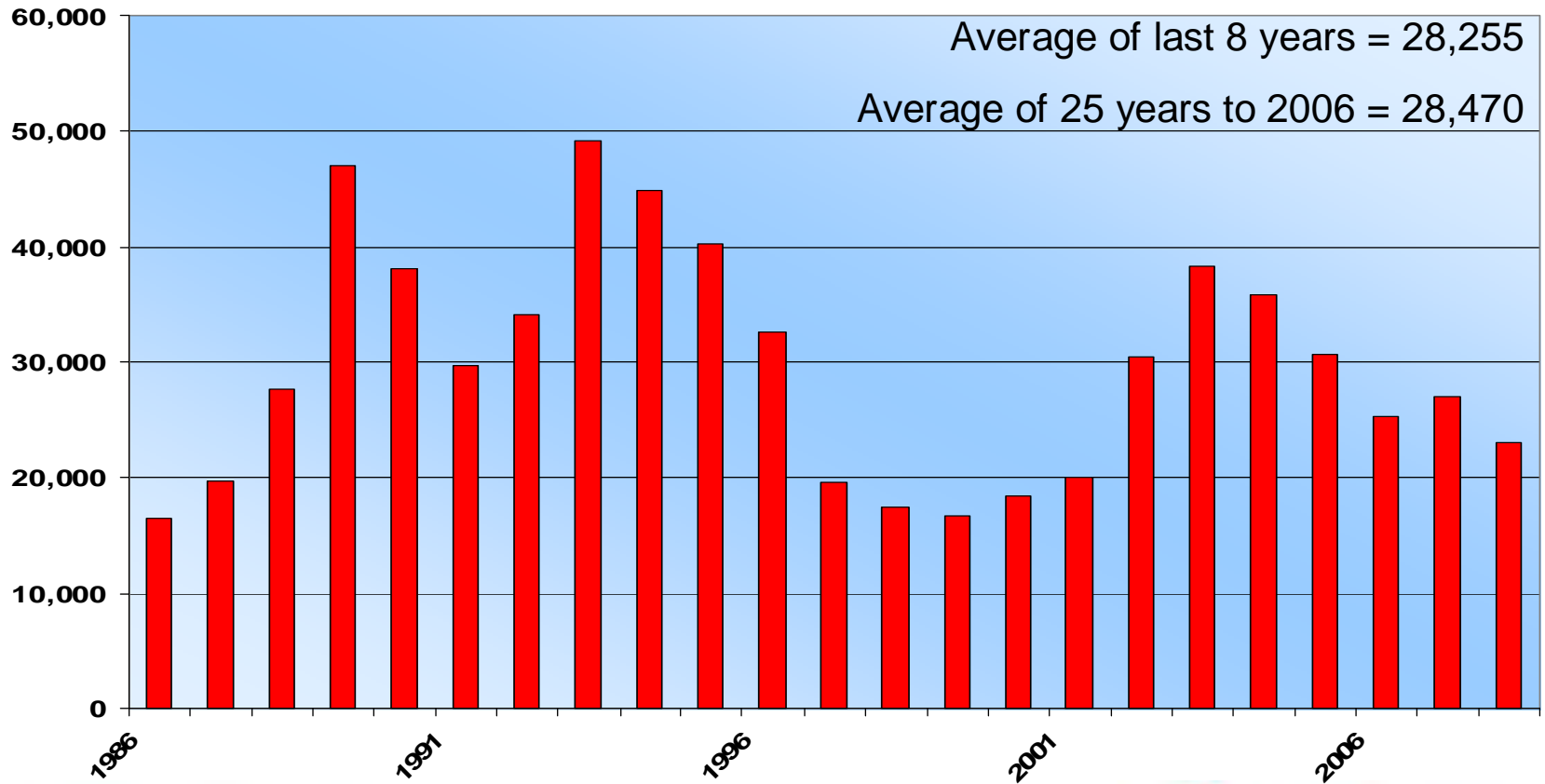
Life expectancy at selected ages

- At 25 years of age – male 54.9 years, female 59.3 years
- At 45 years of age – male 36.0 years, female 39.7 years
- At 50 years of age – male 31.4 years, female 35.2 years
- At 65 years of age – male 18.5 years, female 21.6 years

Net interstate migration, states and territories of Australia, 2003-2008

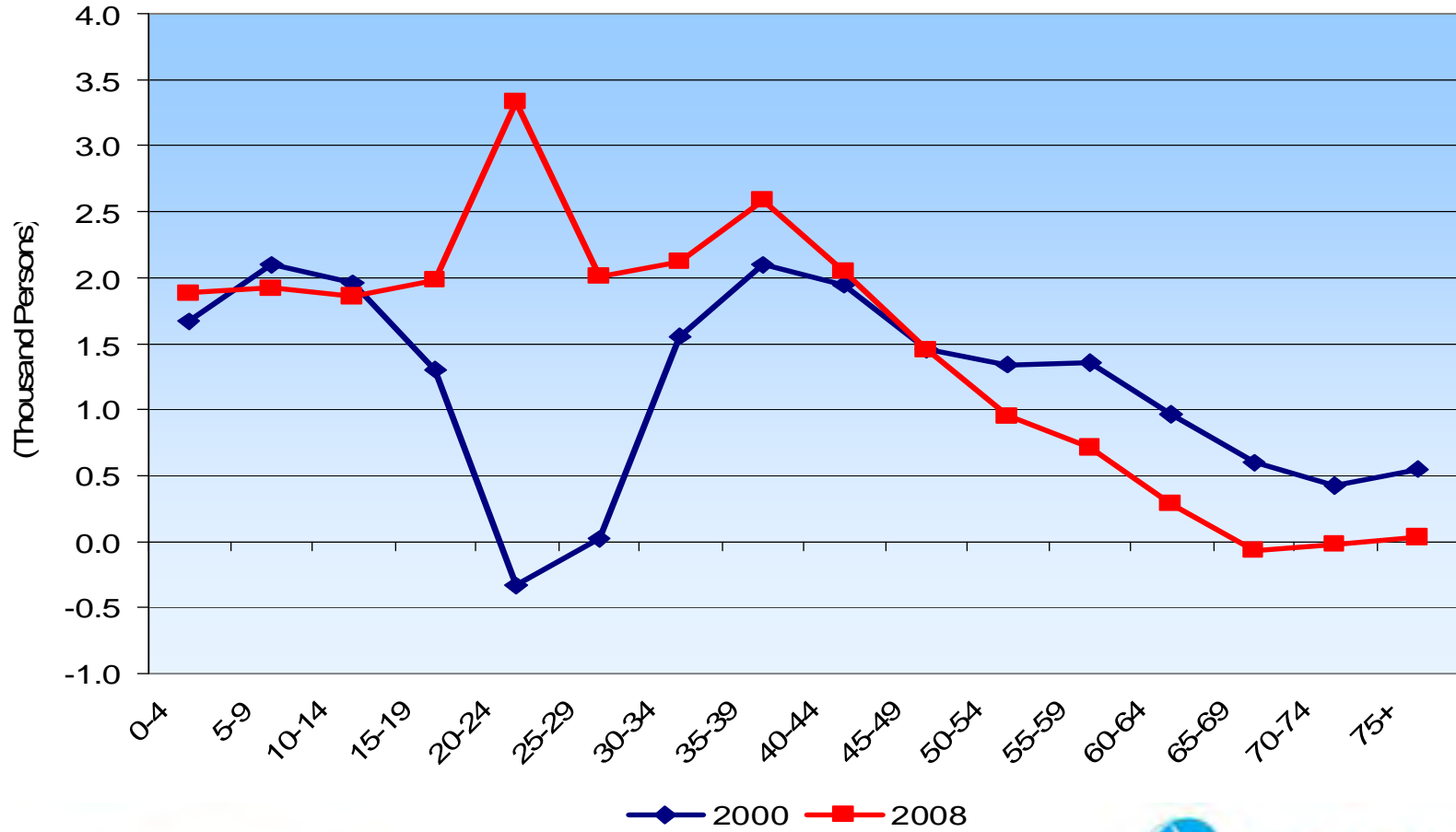


Net interstate migration, Queensland



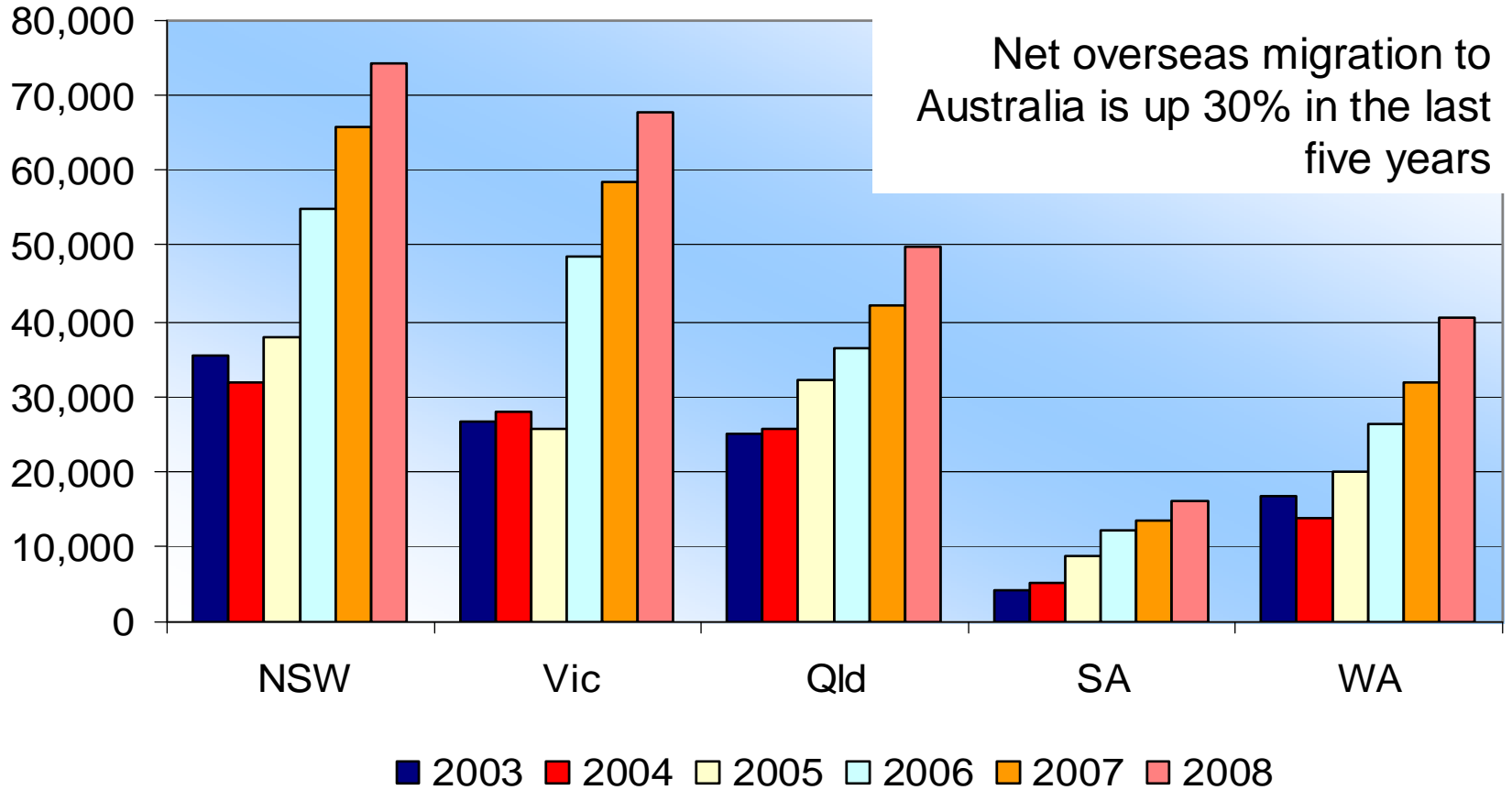
Source: ABS Cat no. 3101.0, various editions, financial years

Changing age distribution of net interstate migration, Queensland, 2000 and 2008



Source: ABS Cat no. 3412.0, various editions

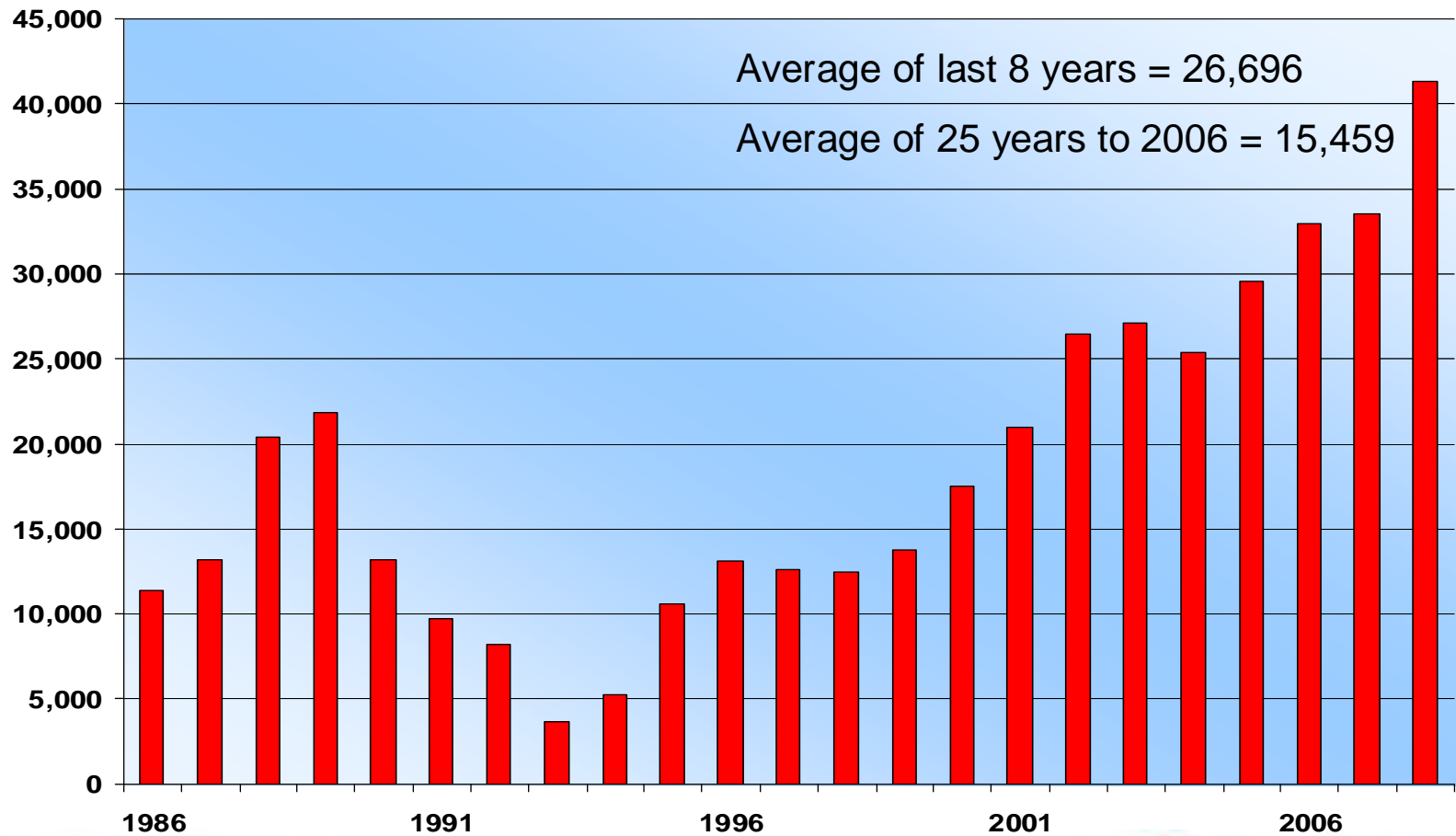
Net overseas migration, states and territories of Australia, 2003-2008



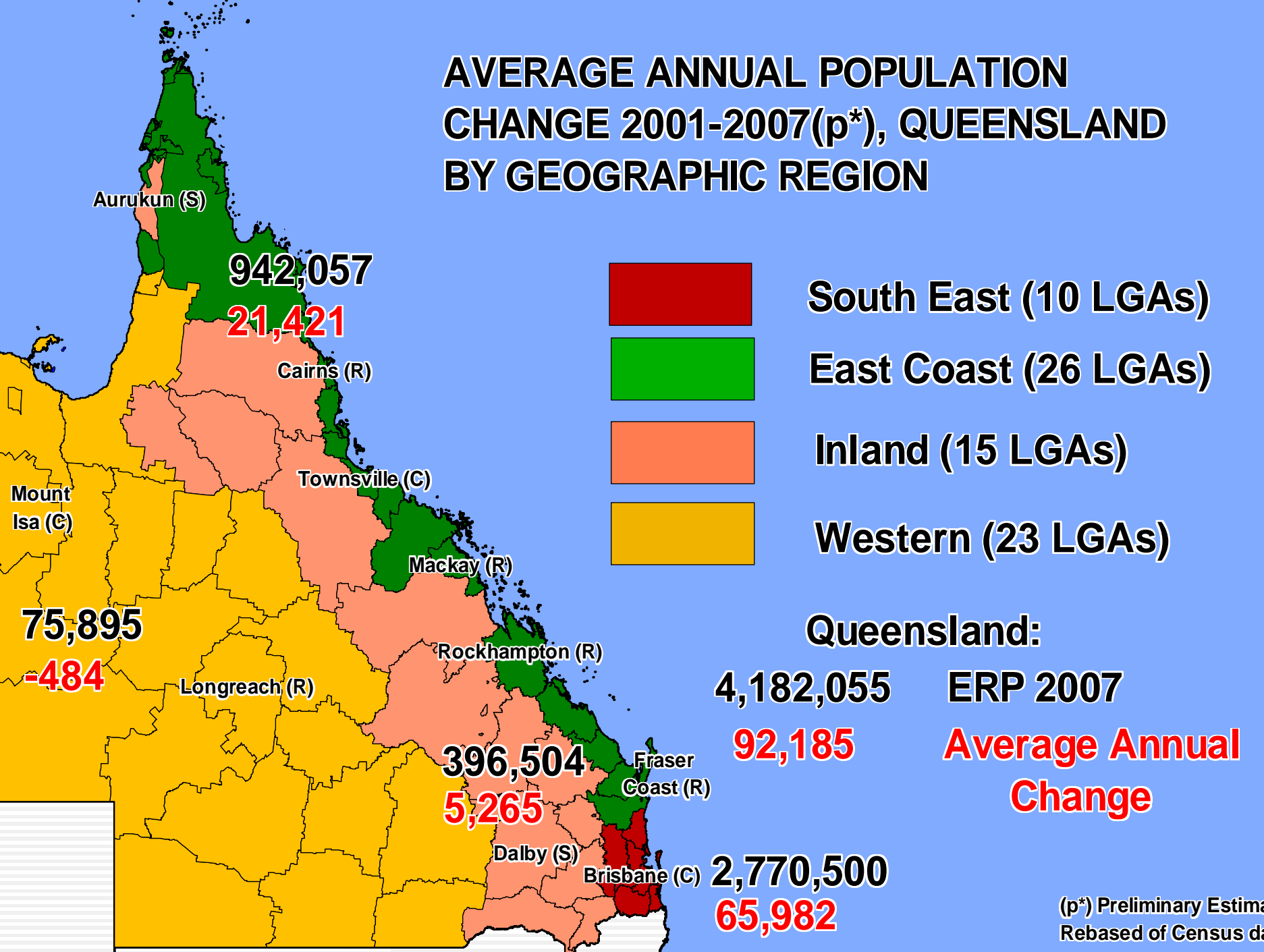
Source: ABS Cat no. 3101.0, calendar years



Net overseas migration, Queensland (financial years)



AVERAGE ANNUAL POPULATION CHANGE 2001-2007(p*), QUEENSLAND BY GEOGRAPHIC REGION



(p*) Preliminary Estimate
Rebased of Census data

10 Largest growing LGAs in Queensland

Average annual growth, 2001-2006, 2006-2007 and 2007-2008

Rank	LGA	2001-2006		2006-2007		2007-2008	
		No.	%	No.	%	No.	%
1	Brisbane (C)	18,922	2.0%	19,219	1.9%	17,368	1.7%
2	Gold Coast (C)	15,866	3.8%	18,205	3.8%	13,210	2.7%
3	Moreton Bay (R)	9,266	3.0%	12,016	3.5%	11,831	3.4%
4	Sunshine Coast (R)	9,583	3.6%	8,986	3.0%	8,734	2.9%
5	Ipswich (C)	3,405	2.6%	5,572	3.8%	6,104	4.1%
6	Cairns (R)	3,889	2.9%	5,130	3.4%	5,985	3.9%
7	Logan (C)	4,557	1.9%	4,740	1.8%	5,225	2.0%
8	Townsville (C)	4,098	2.7%	5,130	3.0%	5,134	3.0%
9	Fraser Coast (R)	3,009	3.8%	3,318	3.6%	3,124	3.4%
10	Redland (C)	2,792	2.3%	2,858	2.1%	2,876	2.1%

10 Largest growing LGAs in Regional Queensland

Average annual growth, 2001-2006, 2006-2007 and 2007-2008

Rank	LGA	2001-2006		2006-2007		2007-2008	
		no.	%	no.	%	no.	%
1	Cairns (RC)	3,889	3.04	5,130	3.48	5,985	3.92
2	Townsville (C)	4,098	2.83	5,130	3.10	5,134	3.01
3	Fraser Coast (RC)	2,968	3.99	3,318	3.72	3,124	3.37
4	Mackay (RC)	3,250	3.57	2,625	2.45	2,650	2.41
5	Bundaberg (RC)	1,791	2.27	2,404	2.73	2,039	2.26
6	Gladstone (RC)	1,514	3.27	1,775	3.29	1,871	3.36
7	Rockhampton (RC)	1,858	1.89	2,599	2.42	1,412	1.28
8	Gympie (RC)	1,115	2.89	1,110	2.51	1,084	2.39
9	Whitsunday (RC)	685	2.45	774	2.47	997	3.10
10	Tablelands (RC)	541	1.33	875	2.01	915	2.06

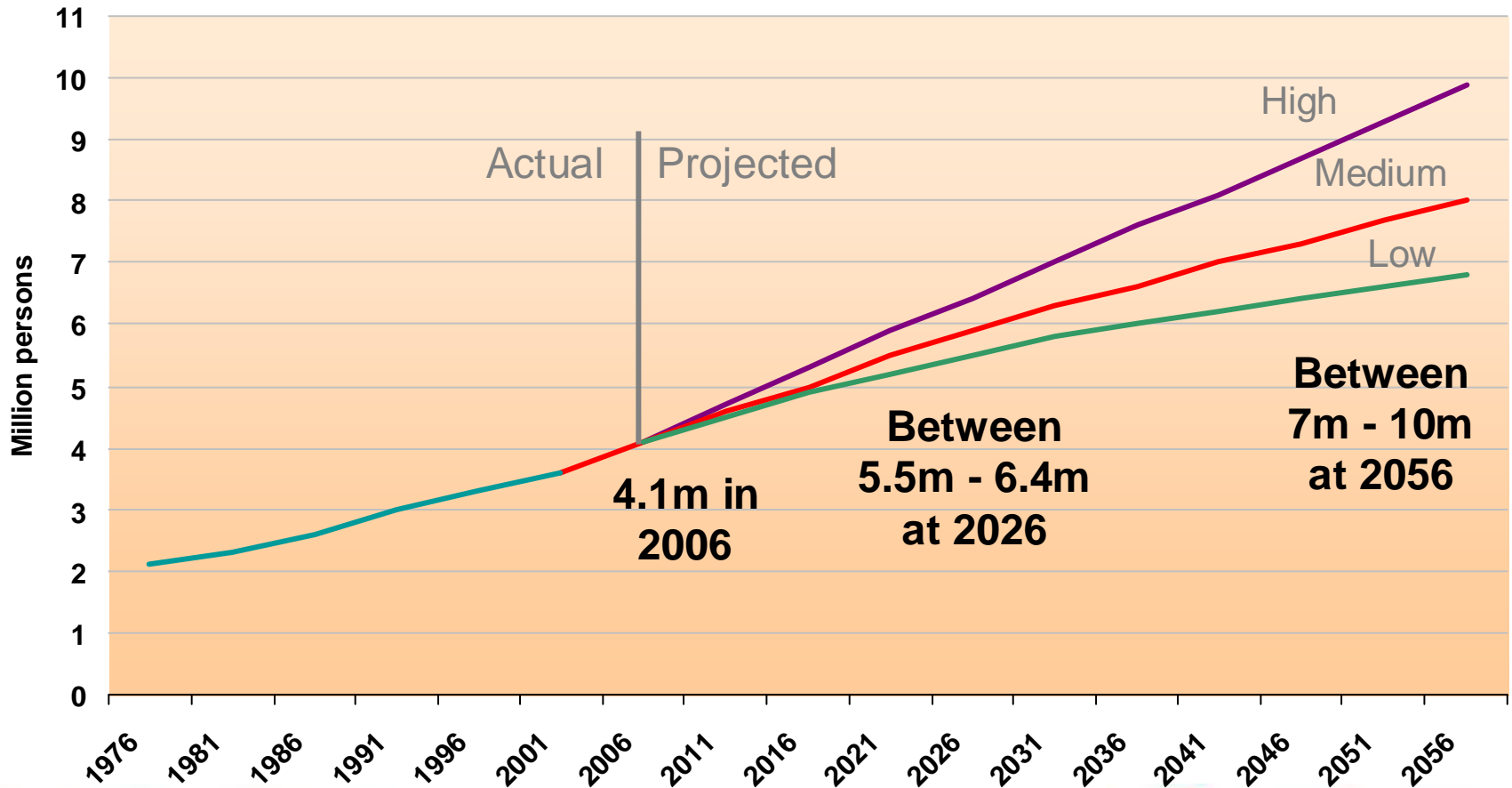


Three series of population projections are produced

- Low, medium and high series are produced
- These reflect more or less optimistic assumptions leading to a lower projected population in the low series and a higher projection in the high series
- We encourage use of a range (between the low and high outcomes), rather than a single number, to reflect variability
- Other outcomes may eventuate if any of the assumptions diverge from what has been assumed

Actual & projected population, Queensland

1976 to 2056



Source: ABS Cat No 3311.3 & Department of Infrastructure and Planning population projections, 2008 ed.

Key facts

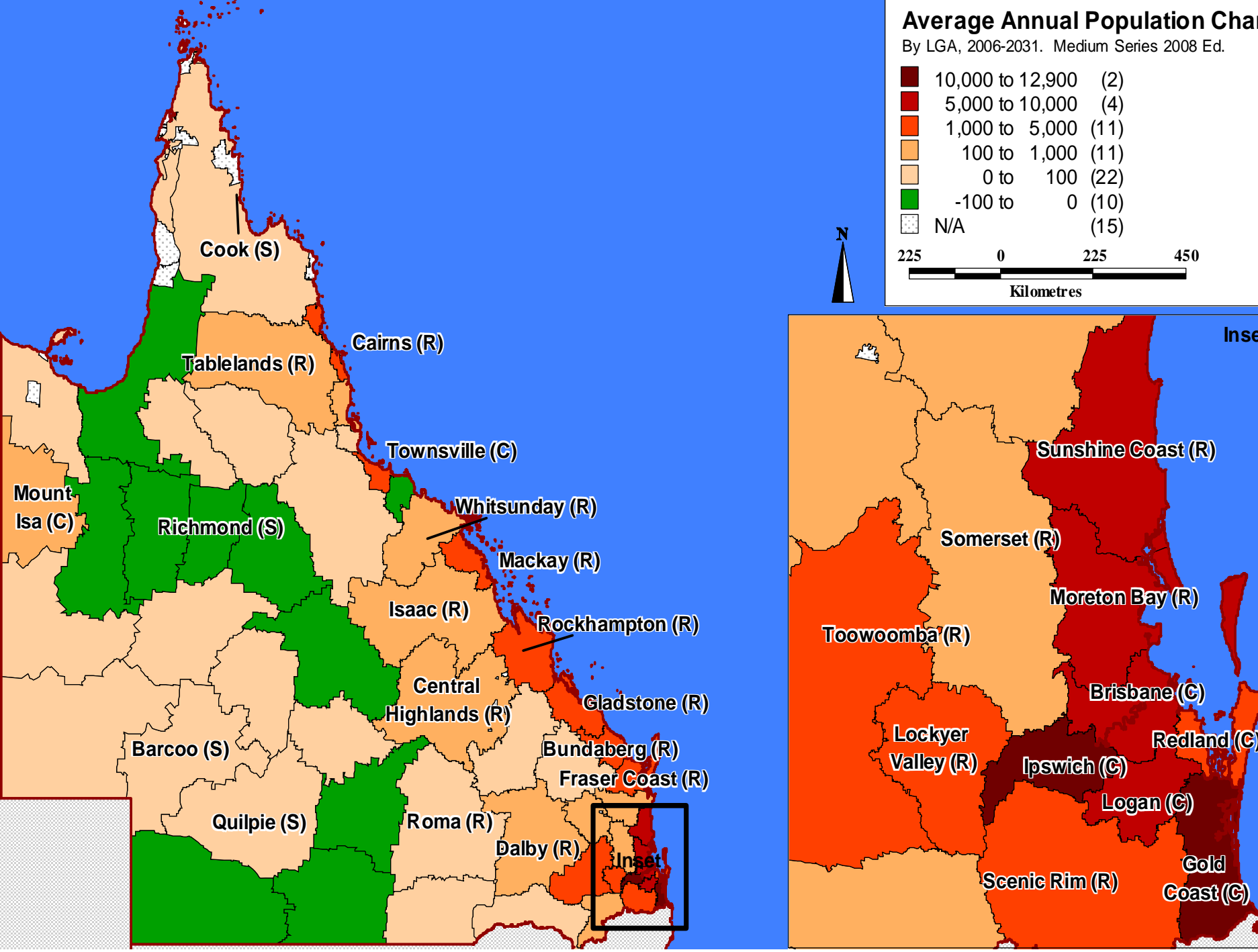
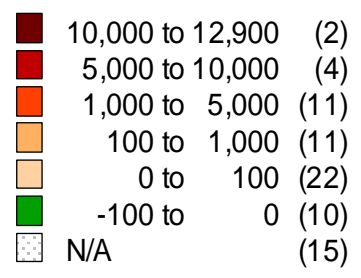
- 4.1m in 2006, 5.9m in 20 years and 8m in 50 years if resemble the medium series
- Higher growth in next 20 years (1.8m) than last 20 (1.5m)
- Highest growth projected in the short term – 95,000pa till 2016

Population milestones

1 million	1938
2 million	1974
3 million	1992
4 million	2006
5 million	2016
6 million	2028
7 million	2042
8 million	2057

Average Annual Population Change

By LGA, 2006-2031. Medium Series 2008 Ed.



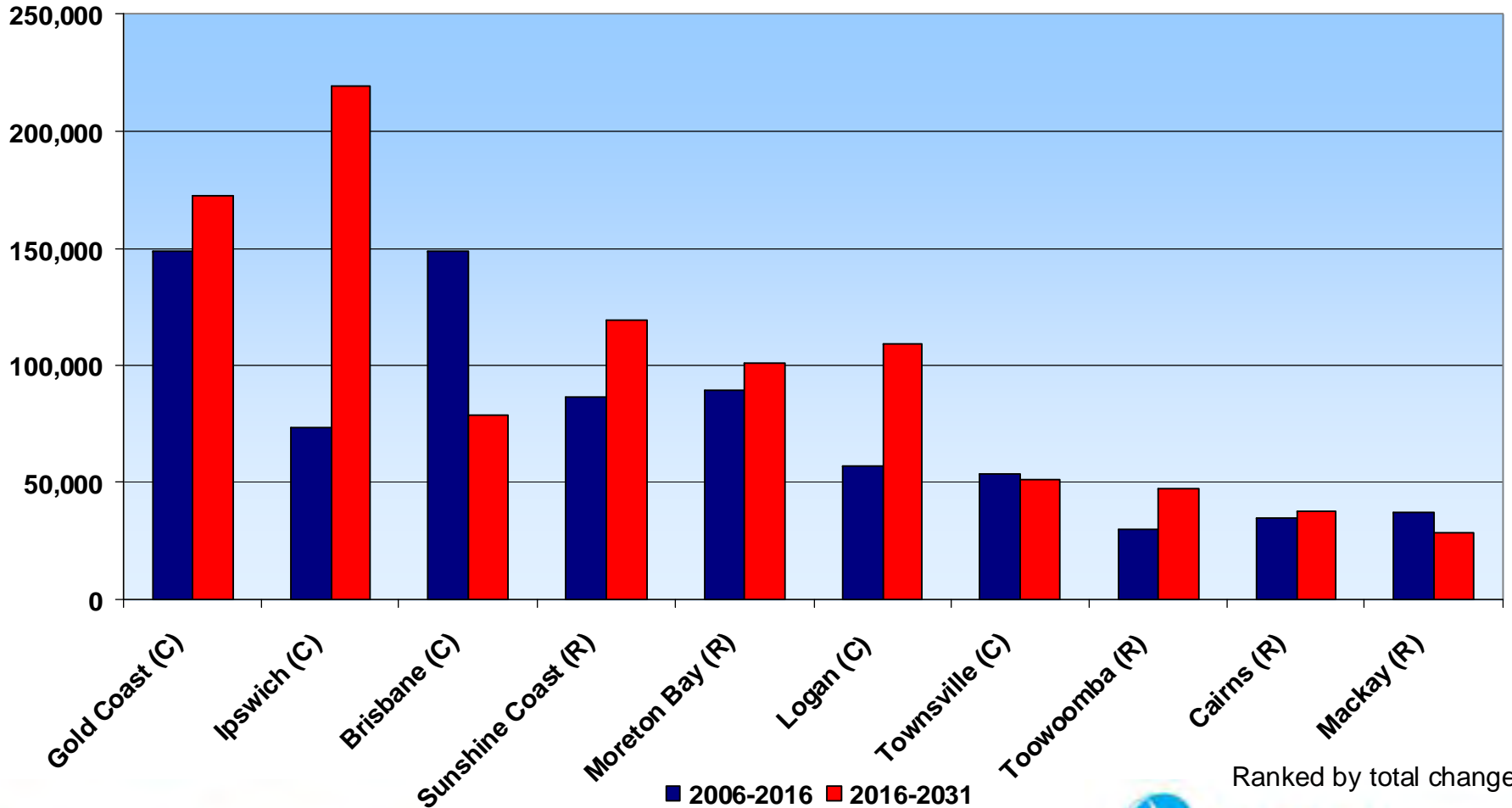
10 largest growing LGAs in Queensland

Average annual growth, 2006-2031

Rank	LGA	Population		Average annual population change	
		2006	2031	No.	%
1	Gold Coast (C)	466,433	788,231	12,872	2.1
2	Ipswich (C)	142,400	434,788	11,696	4.6
3	Brisbane (C)	991,260	1,220,543	9,171	0.8
4	Sunshine Coast (R)	295,084	501,179	8,244	2.1
5	Moreton Bay (R)	332,862	523,037	7,607	1.8
6	Logan (C)	260,081	425,918	6,633	2.0
7	Townsville (C)	165,278	270,500	4,209	2.0
8	Toowoomba (R)	151,297	228,461	3,087	1.7
9	Cairns (R)	147,538	222,640	3,004	1.7
10	Mackay (R)	107,332	172,993	2,626	1.9



Ten LGAs with largest population growth (2006-2031)



Ranked by total change





South East Queensland*

- 2.97m people in 2008
- Growth last 25 years (1981-2006) = 1.34m
 - Average 1981-2006 - 53,700 each year
 - Average 2001-2006 - 66,340 each year
- Projected growth next 25 years (2006-2031) = 1.60m to reach 4.43m
 - Average 2006-2031 - 64,100 each year
 - Average 2006-2011 – 66,850 each year



* SEQ Region including Toowoomba Statistical District





South East Queensland - outlook

- Prospects are for strong growth to continue
- Migration will continue to be the main driver of growth - overseas
- Main cities – Brisbane, Gold Coast, (Moreton Bay), Sunshine Coast
- Growth will be split between
 - major greenfield areas of Ipswich, Logan and West Moreton
 - Brisbane inner city infill and redevelopment
 - coastal cities of Gold Coast and Sunshine Coast
 - TODs and other centres or nodes
- Population will continue to cluster along the coast although policy, affordability and planned infrastructure provision will favour the west



Eastern Regional Queensland

- 1.37m people in 2008
- Growth last 25 years (1981-2006) = 451,500
 - 1981-2006 – average of 18,000 each year
 - 2001-2006 – average of 26,700 each year
- Projected growth next 25 years (2006-2031) = 614,300 to reach 1.93m
 - 2006-2031 – average of 24,575 each year



Main growth areas in Eastern Regional Queensland



Shares of growth	1981-1991	1991-2001
Cairns (R)	16.6%	20.3%
Townsville (R)	13.3%	15.8%
Toowoomba (R)	11.0%	10.1%
Fraser Coast (R)	9.5%	12.0%
Mackay (R)	7.6%	10.0%
Shares of growth	2001-2011	2011-2021
Townsville (R)	16.3%	18.6%
Cairns (R)	14.1%	10.5%
Mackay (R)	12.1%	12.7%
Fraser Coast (R)	10.6%	9.2%
Toowoomba (R)	10.1%	12.0%



Eastern Regional Queensland - outlook

- Strong relative advantages
- Impact of ongoing resource activity
 - Resident workers
 - Expansion of businesses to service industry
- Strong industrial, educational and tourism sectors lead to job creation and continuing migration prospects
- Lifestyle destinations will continue to attract people
- Future population will concentrate even further into key regional cities and major towns and these will account for most of the growth
- Smaller communities (ageing, rationalisation of agricultural workforce, increased contracting) to have small declines

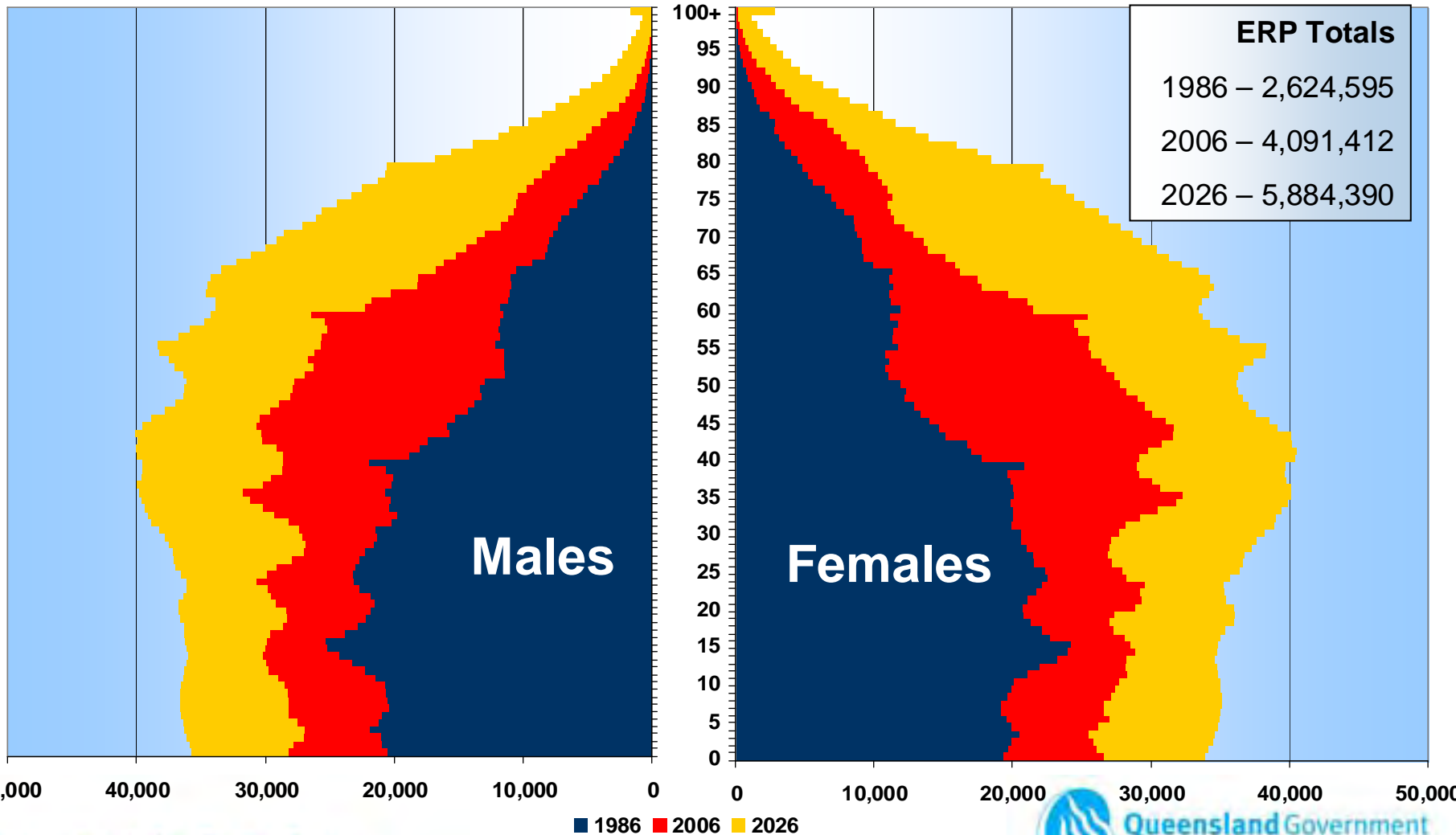


Western Regional Queensland

- 72,200 people in 2007
- Decline last 25 years (1981-2006) = 10,000
 - 1981-2006 average of -400 each year
 - 2001-2006 average of -520 each year
- Projected growth next 25 years (2006-2031) = 6,900 to reach 78,095
 - 2006-2031 – average of 275 each year
- Past decades 10 yrs to 1991 -238, 10 yrs to 2001 -603
- Future decades 10 yrs to 2011 will be 93, 10 yrs to 2021 will be 17

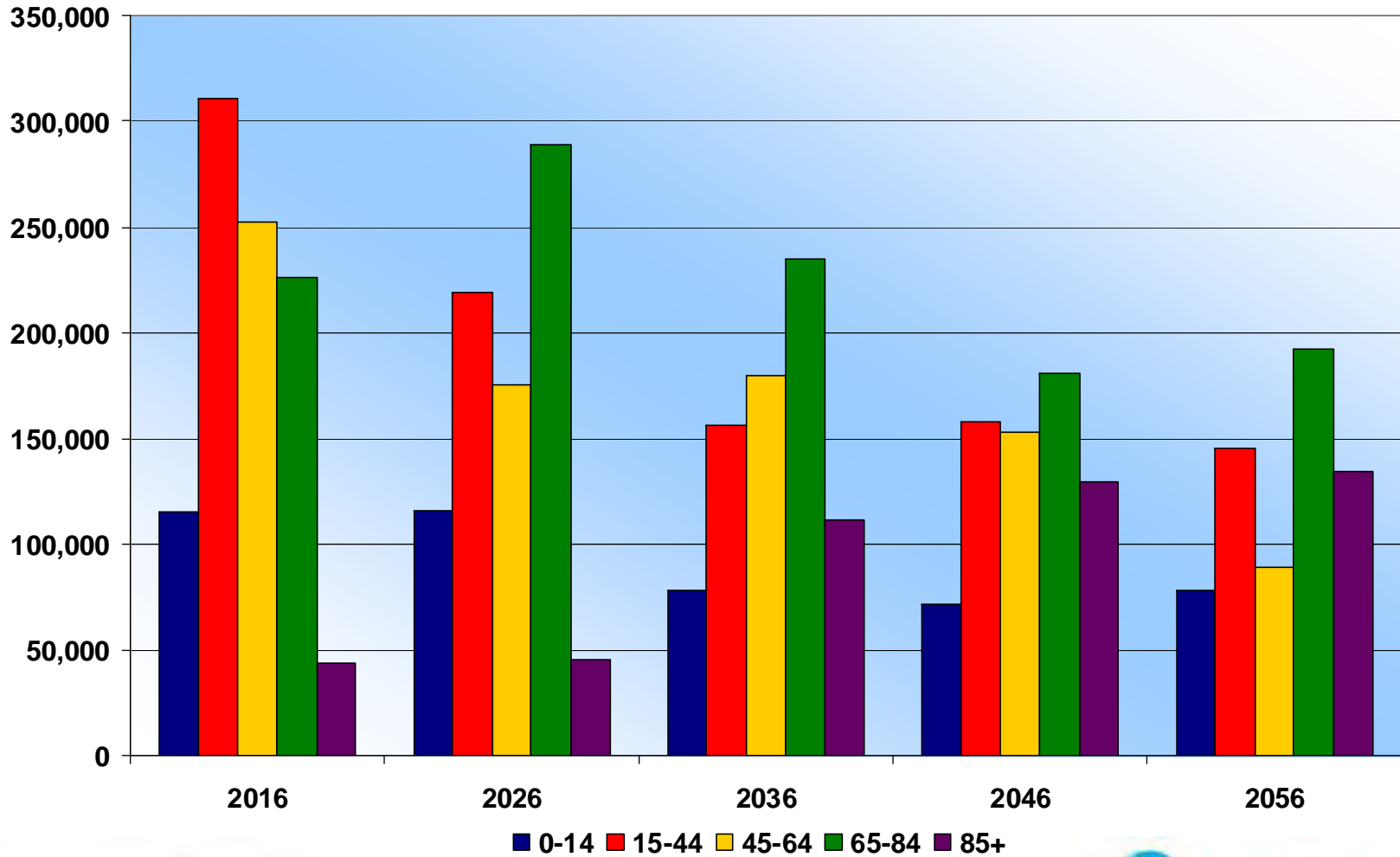


Queensland age by sex, 1986, 2006, 2026



Population change by broad age groups, QLD

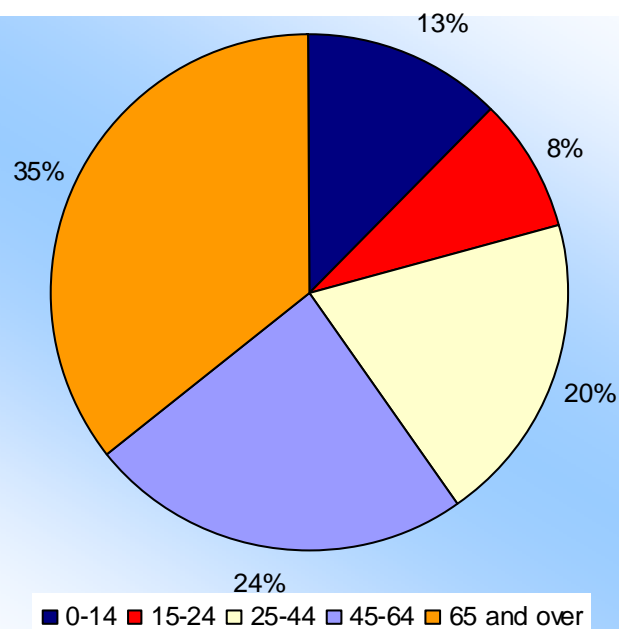
decades ending





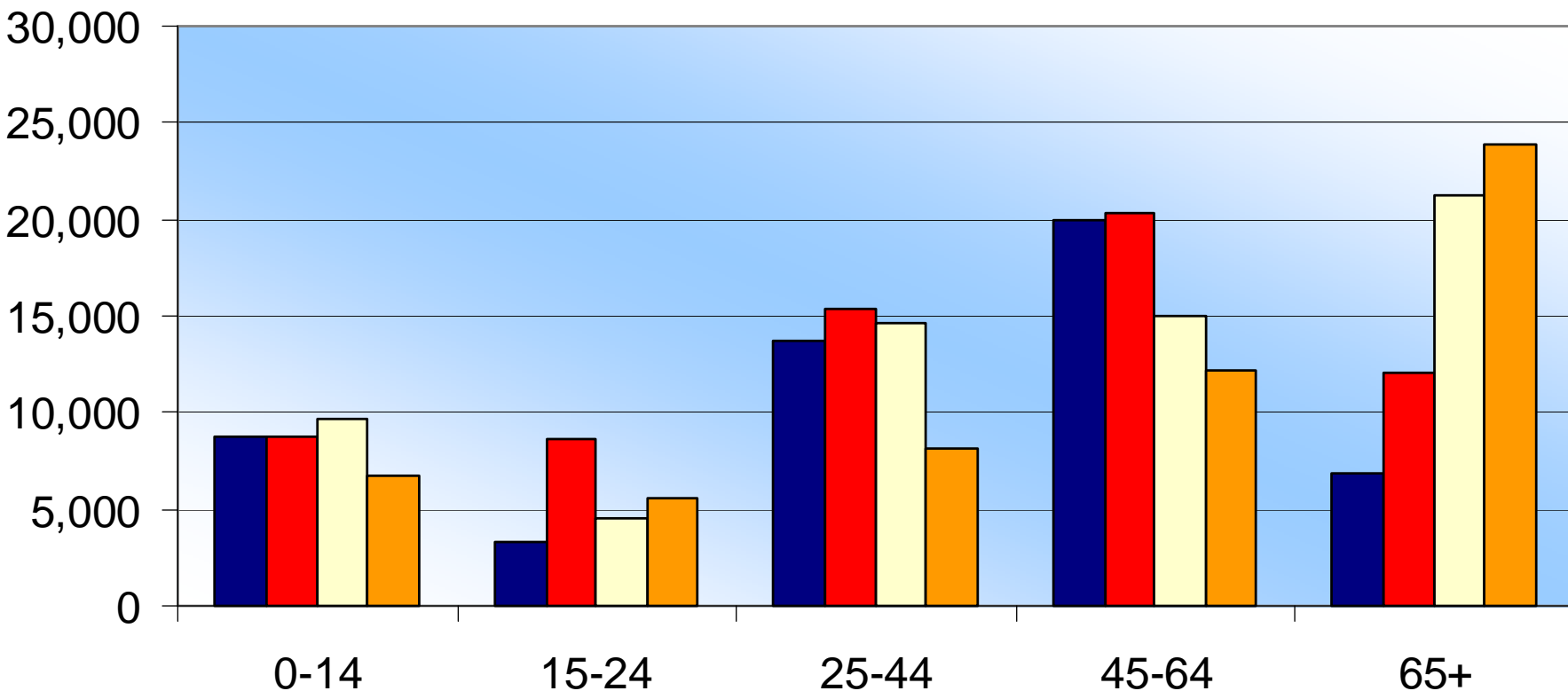
Projected changes to Queensland's age structure

- Of the projected increase of 2.2m people over the next 25 years
 - 36% (or 781,000 people) will be 65 and over
 - 24% (or 519,500 people) will be between 45 and 64 years
 - 20% (or 428,000 people) will be between 25 and 44 years
 - 12% (or 275,250 people) will be less than 15 years
 - 8% (or 178,430 people) will be between 15 and 24 years





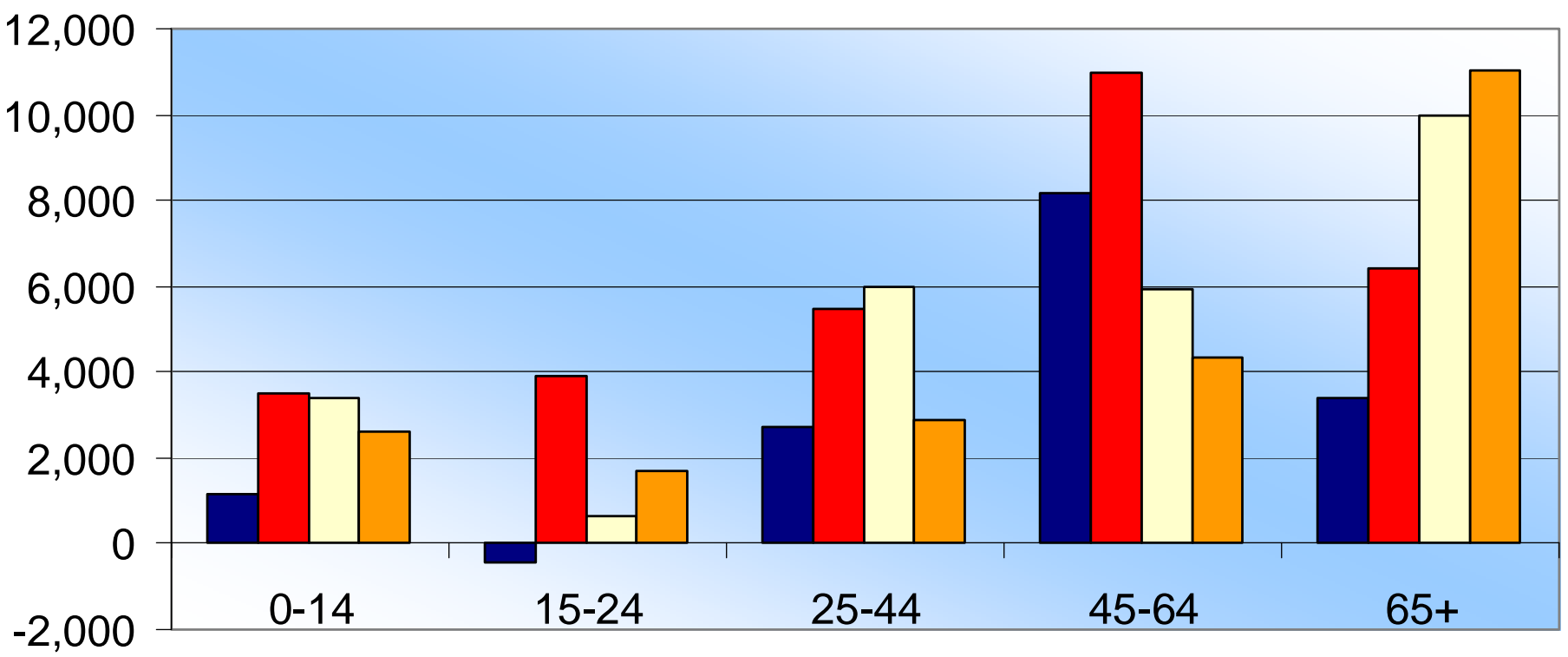
Past and projected change to SEQ age structure



■ 10 years to 2001 ■ 10 years to 2011 ■ 10 years to 2021 ■ 10 years to 2031



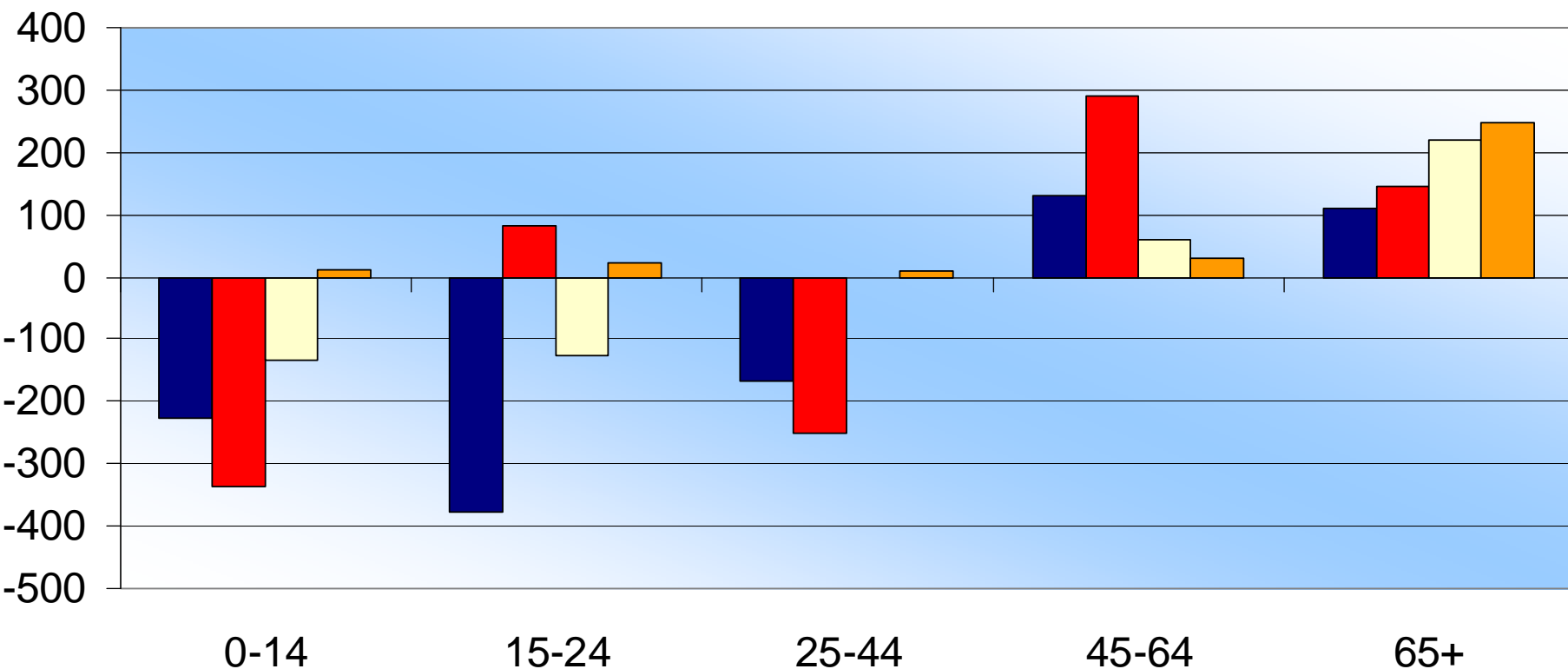
Past and projected change to Eastern Regional Queensland age structure



■ 10 years to 2001 ■ 10 years to 2011 □ 10 years to 2021 ■ 10 years to 2031



Past and projected change to Western Regional Queensland age structure



■ 10 years to 2001 ■ 10 years to 2011 ■ 10 years to 2021 ■ 10 years to 2031



Summary

- Most of the future growth will be focused in the south east corner - particularly along the coast and in Ipswich
- Regional cities, also mostly along the coast except for Toowoomba, will also have continuing strong growth
- Smaller towns and localities, on or near the coast, adjacent to a larger centre or seen as lifestyle destinations, will grow
- Smaller centres inland or in western Queensland will have either stable populations or small declines
- Exceptions are locations near to resource development activity – if the associated workforce chooses to live locally

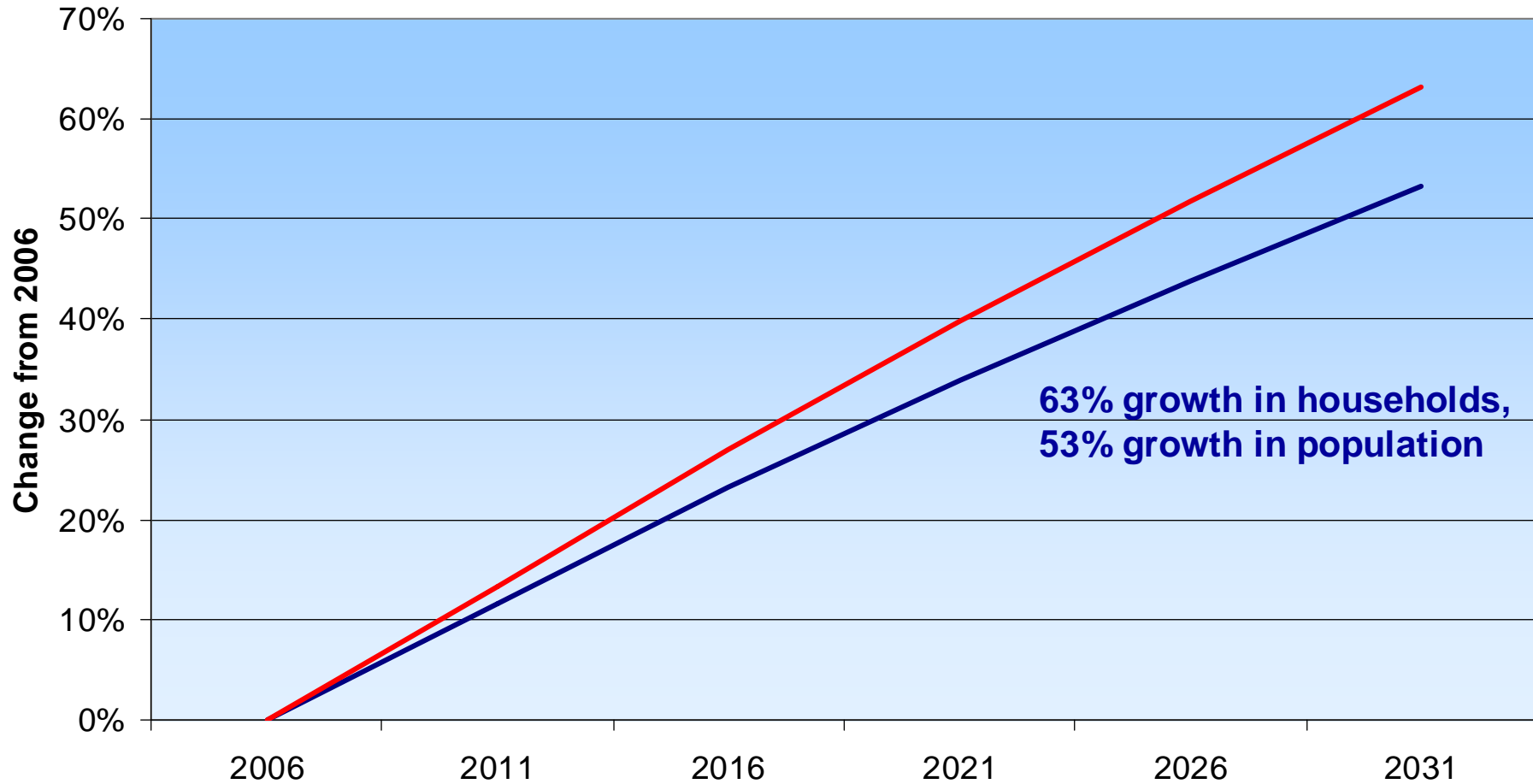


Queensland's future population will be very different to the current one

- Size – will be much larger (2031 population will be 1.4 – 1.7 times larger than in 2006)
- Distribution – increasing concentration in SEQ but pace will slow as regional cities are the location of more growth than in past years. Western Queensland will continue to lose population but more slowly than in the past.
- Composition – ageing, ageing, ageing
 - Under 45 years 40% of growth
 - 45 years or more (60% of growth (one in three new people will be aged 65 years or more)
 - More overseas born



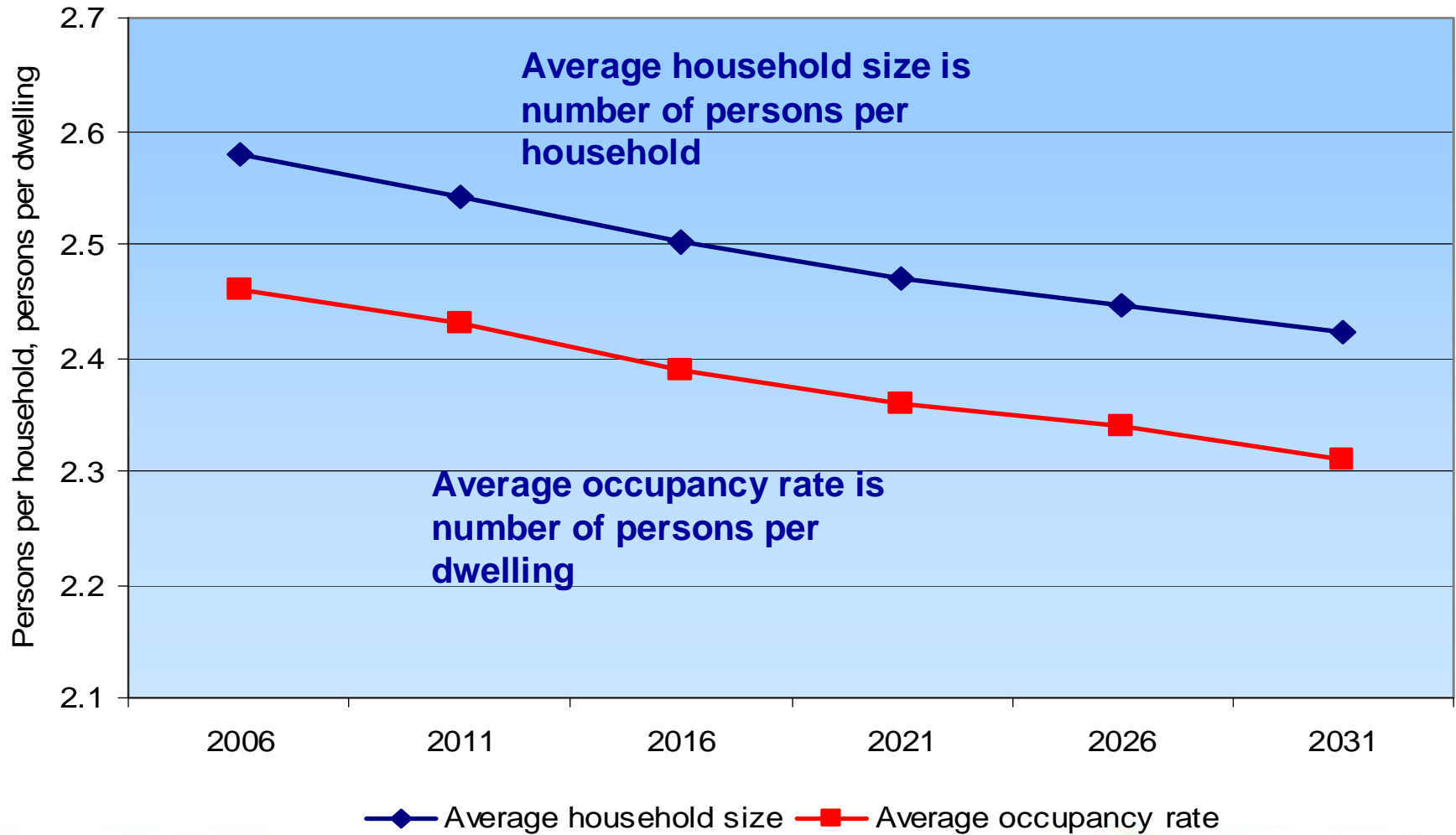
Household growth will outstrip population growth in QLD



**63% growth in households,
53% growth in population**

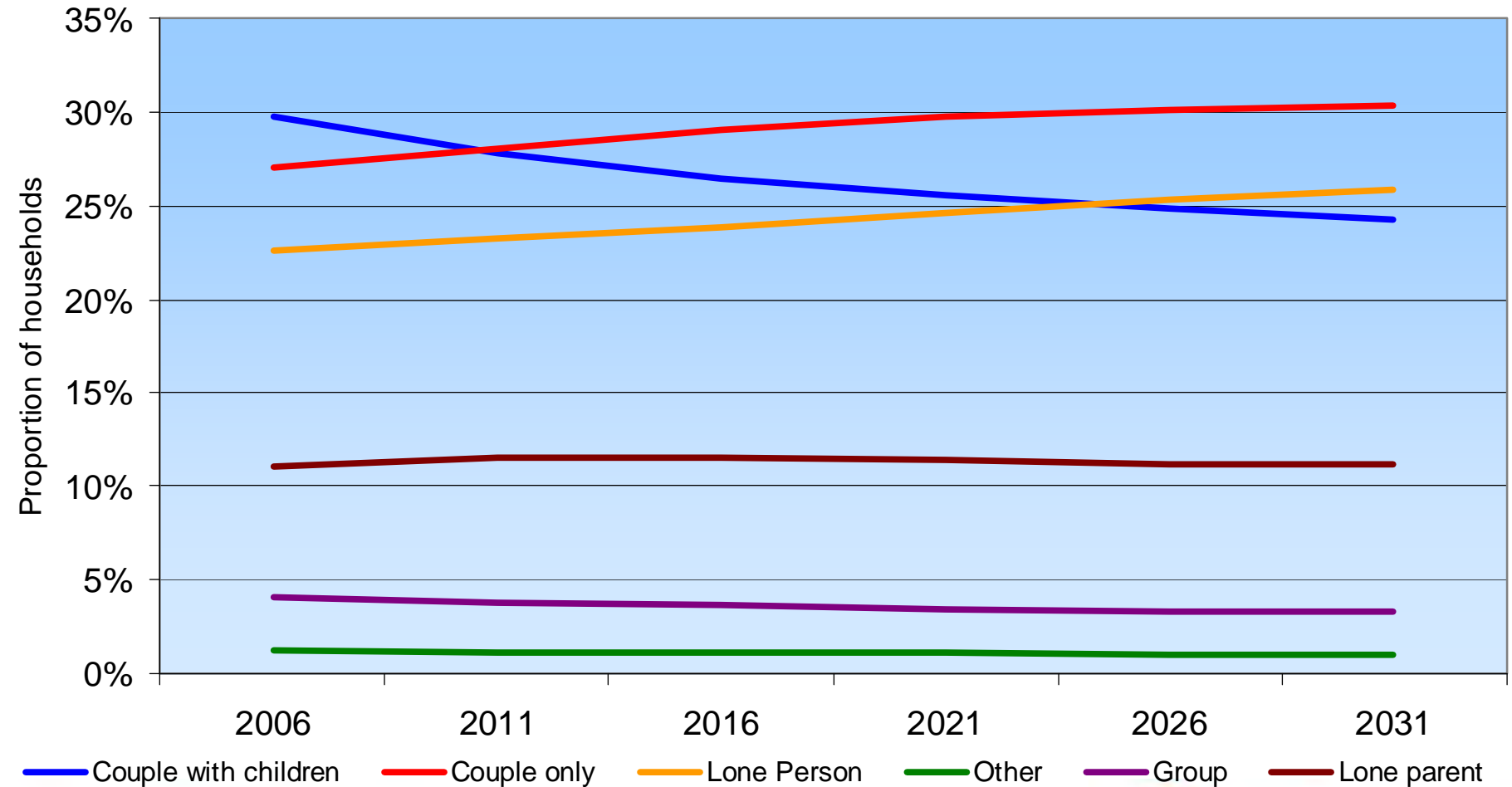


Average household size & occupancy rate, QLD 2006-2031





Increasing dominance of couple only and lone person households in Queensland



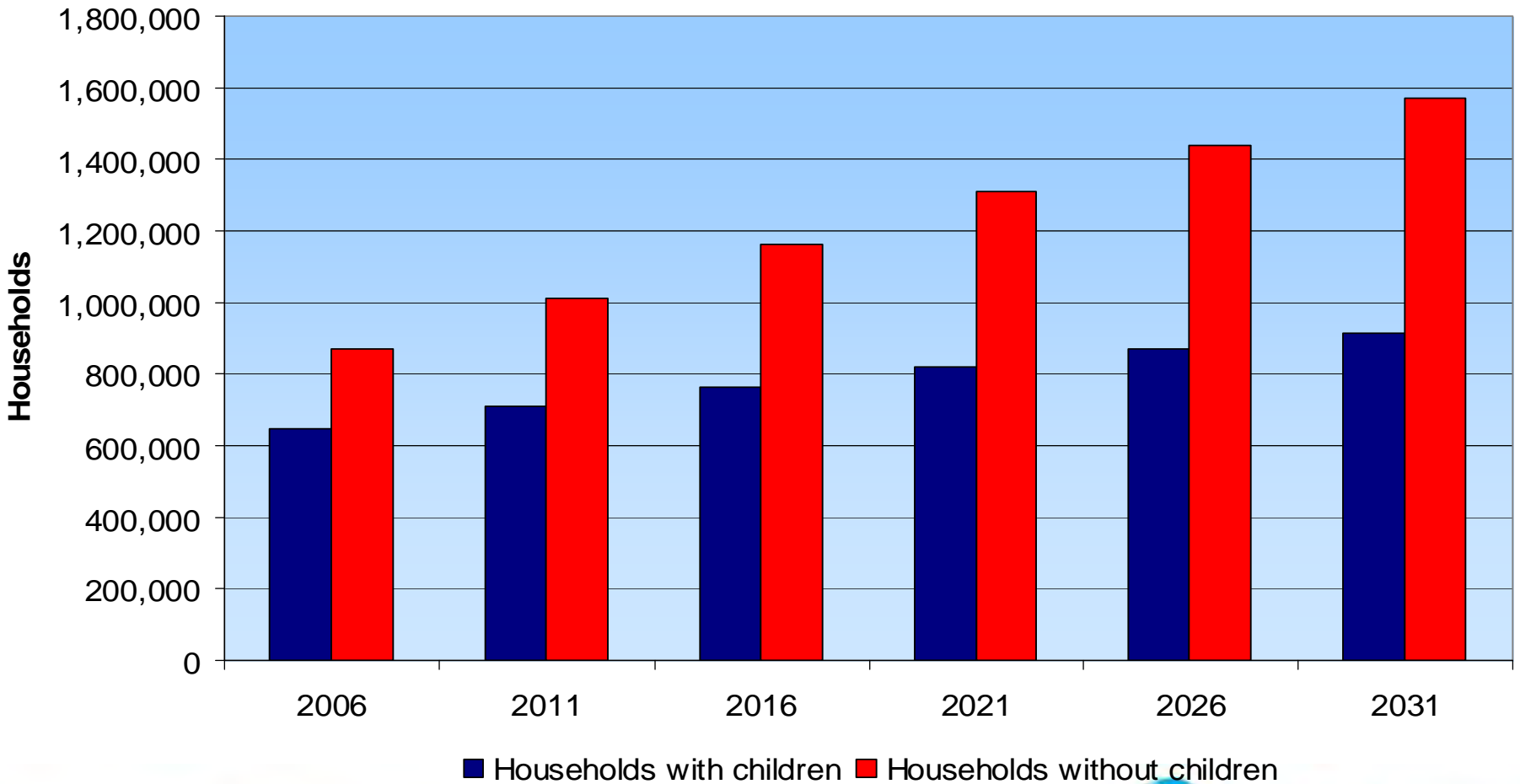


Drivers of change

- Large increase in last 15 years in households without children, at the expense of traditional family households
 - Due to population ageing and increasing life expectancy
 - Baby boomers moving into retirement and couple only households – will become lone person households
 - Children of the boomers moving into young family stage
 - Delayed fertility may have stalled
 - Increasing number of older people will be main influence on future household structure

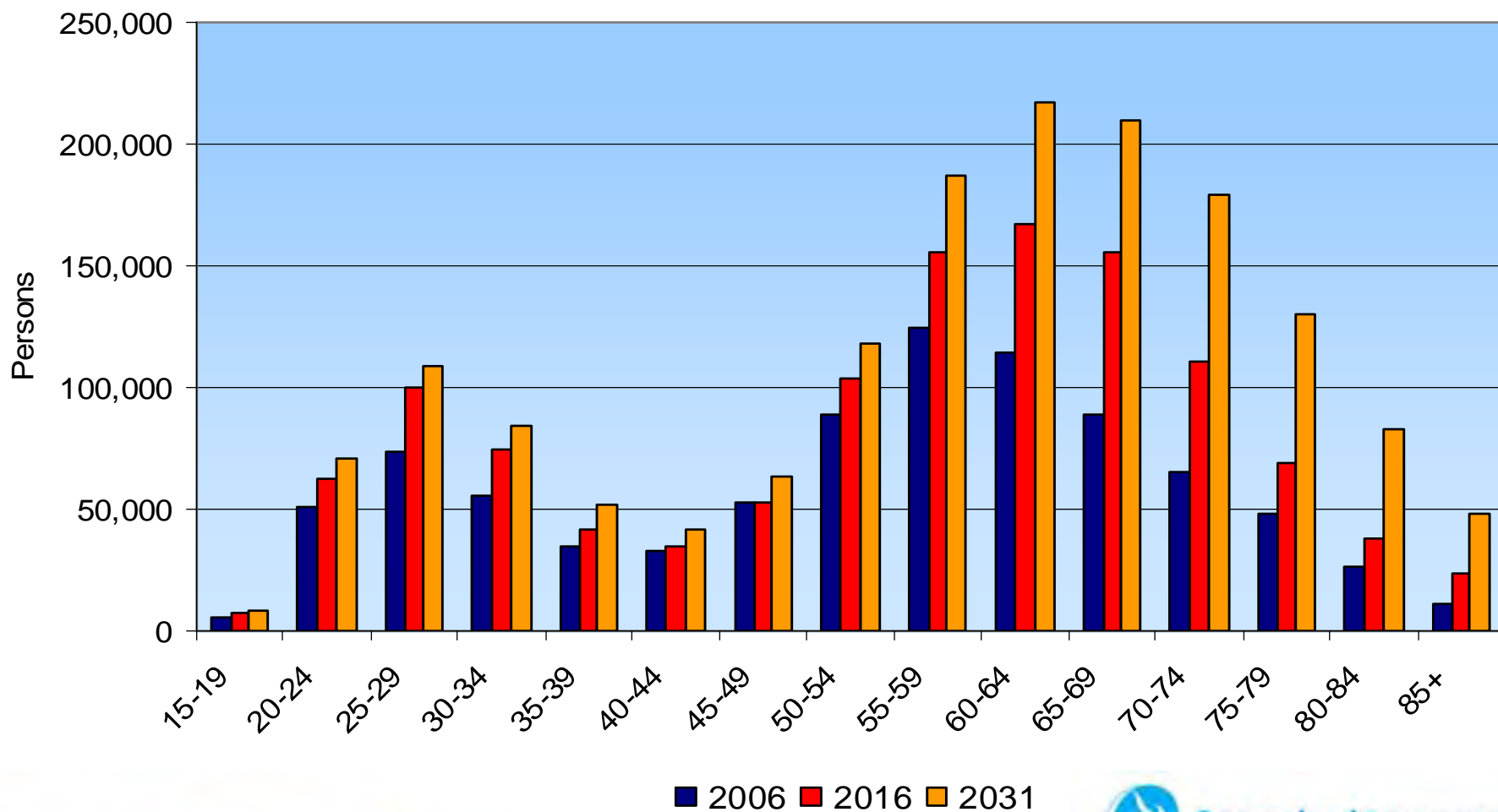


Households with and without children, Queensland



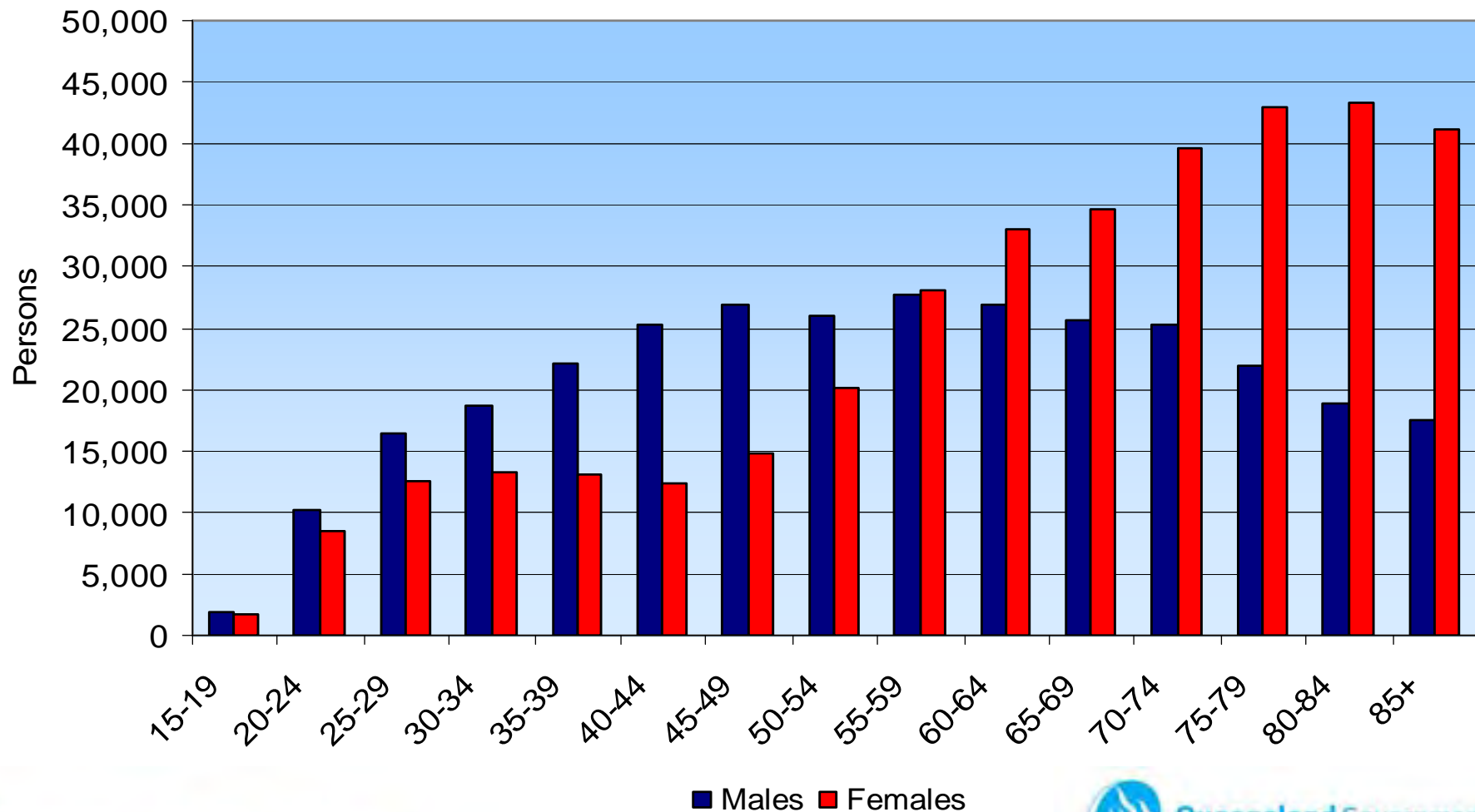


Couple only households by age, QLD 2006-2031





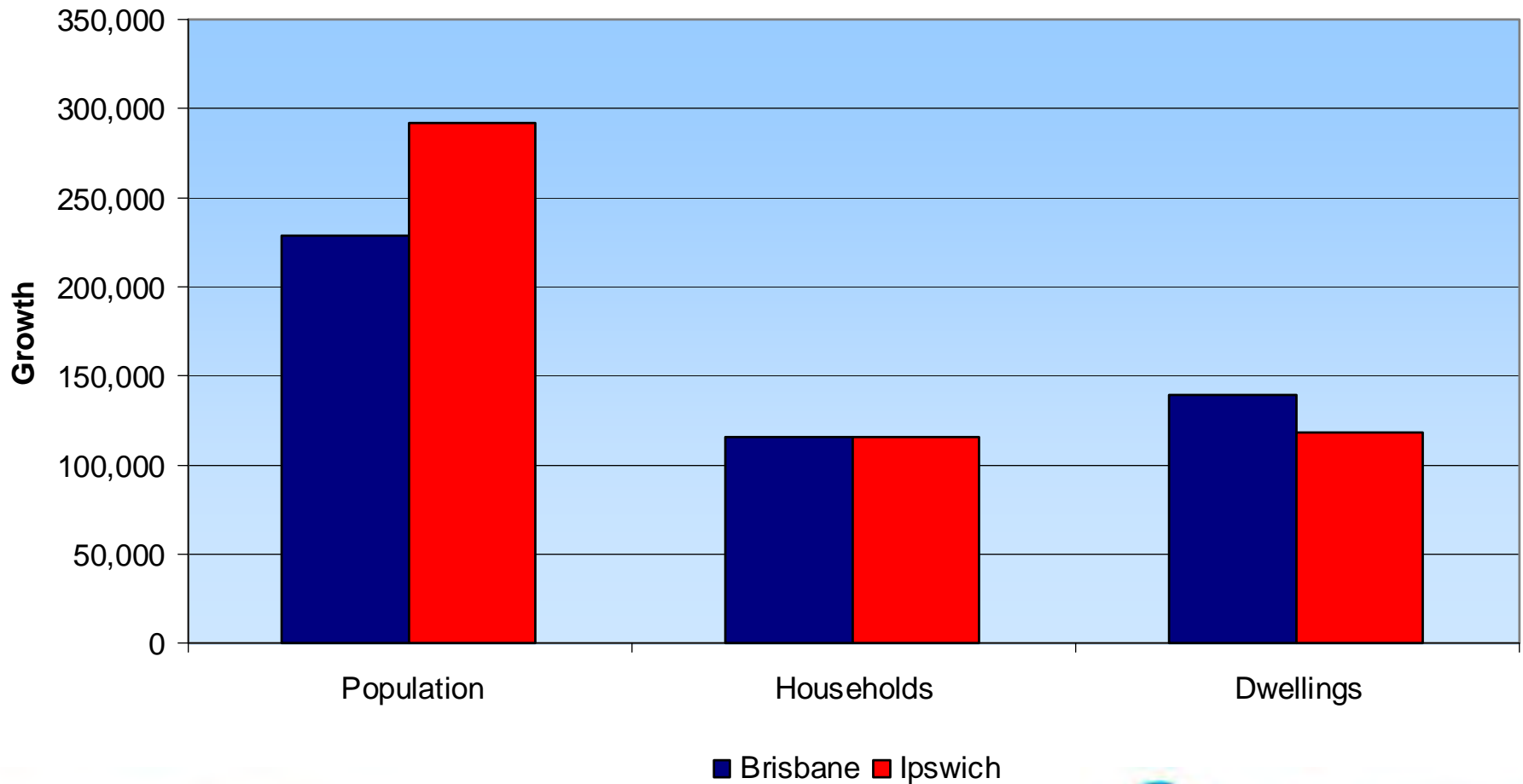
Lone person households by age and sex, QLD 2031



■ Males ■ Females

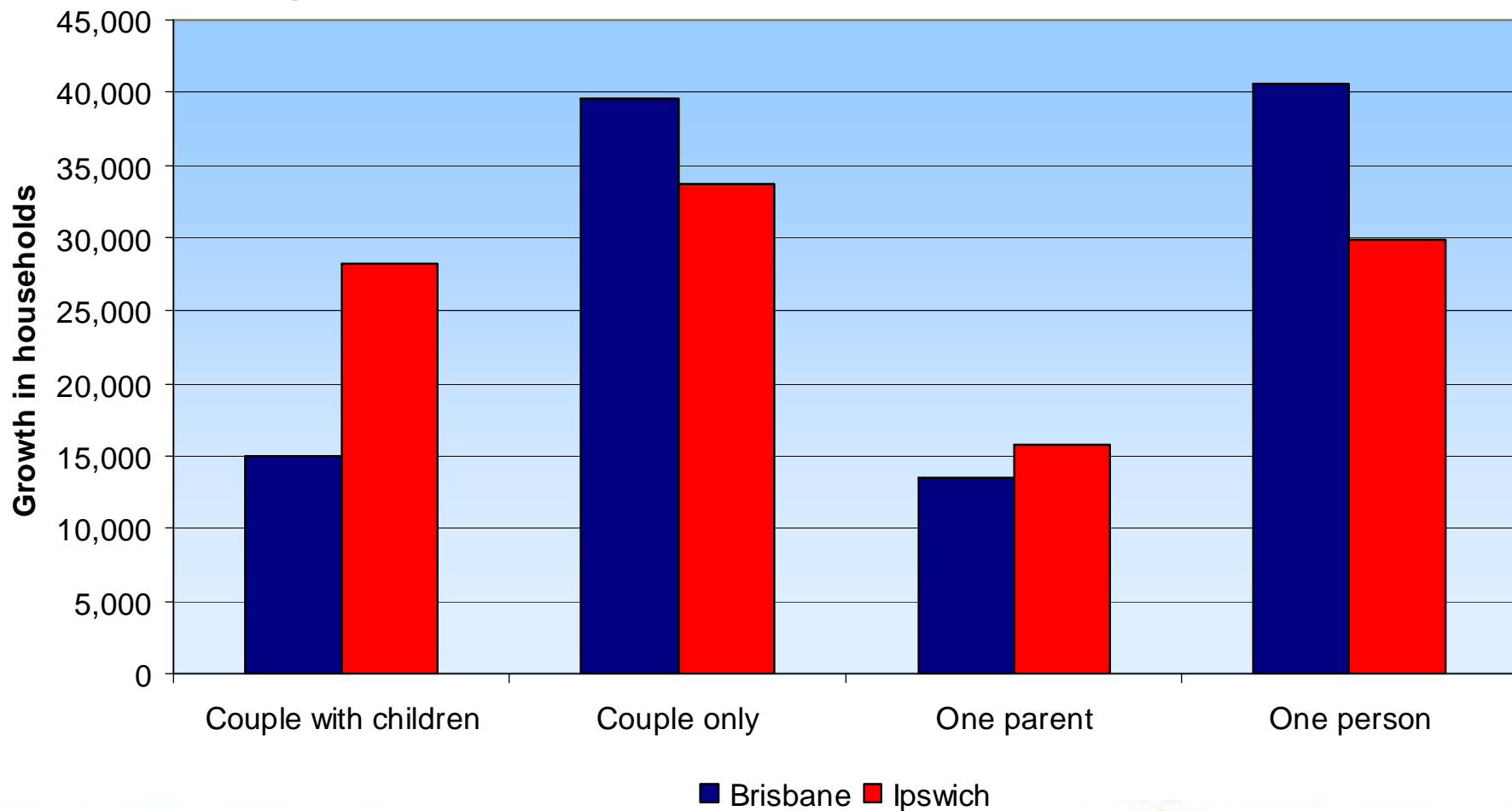


Growth in population, households and dwellings 2006-2031





Projected growth by household type, 2006-2031





Summary

- While Queensland's population growth is rapid, household and dwelling growth will be faster
- The ageing population will have very significant impacts on the living arrangements of Queensland residents in the future
- Households without children (couple, lone person, group households) will make up a larger share of the total



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