

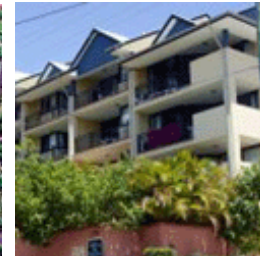


Department of Infrastructure and Planning

Trends and prospects at the local government area level

Alison Taylor

Queensland's future population 2008 edition seminar,
9th December 2008





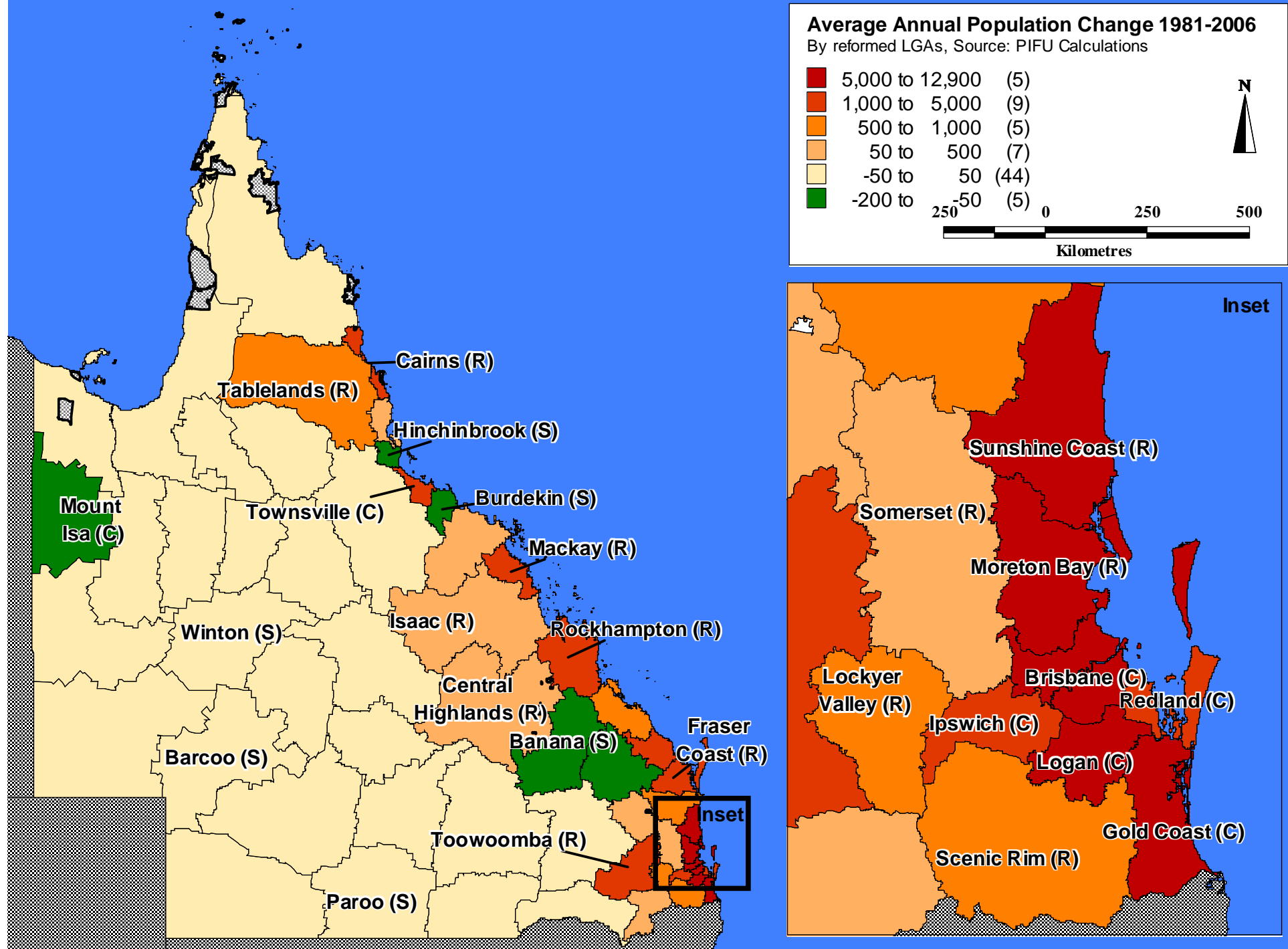
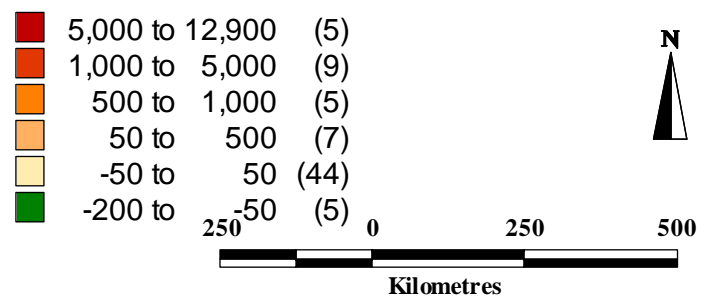
Outline

- Past and future growth at the local government area level
- Past 25 years 1981-2006 and future 25 years 2006-2031
- Mix of 'old' and 'new' local government area boundaries
- Total populations and age structure

- South East Queensland
- Regional Queensland (Eastern and Western)

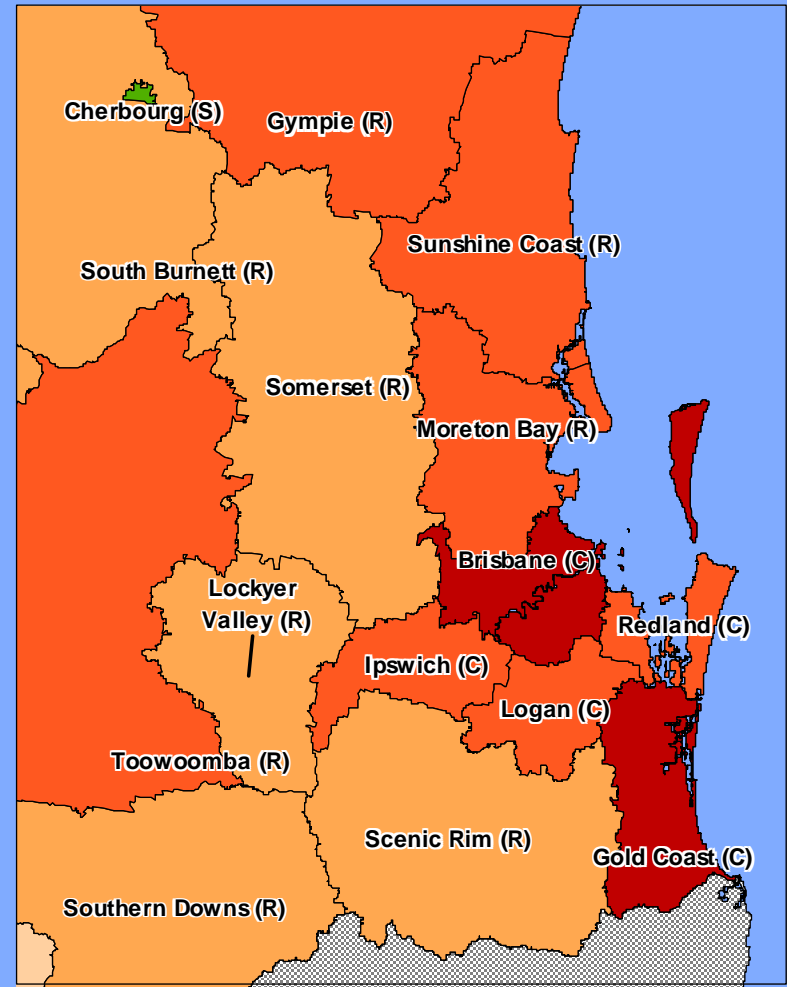
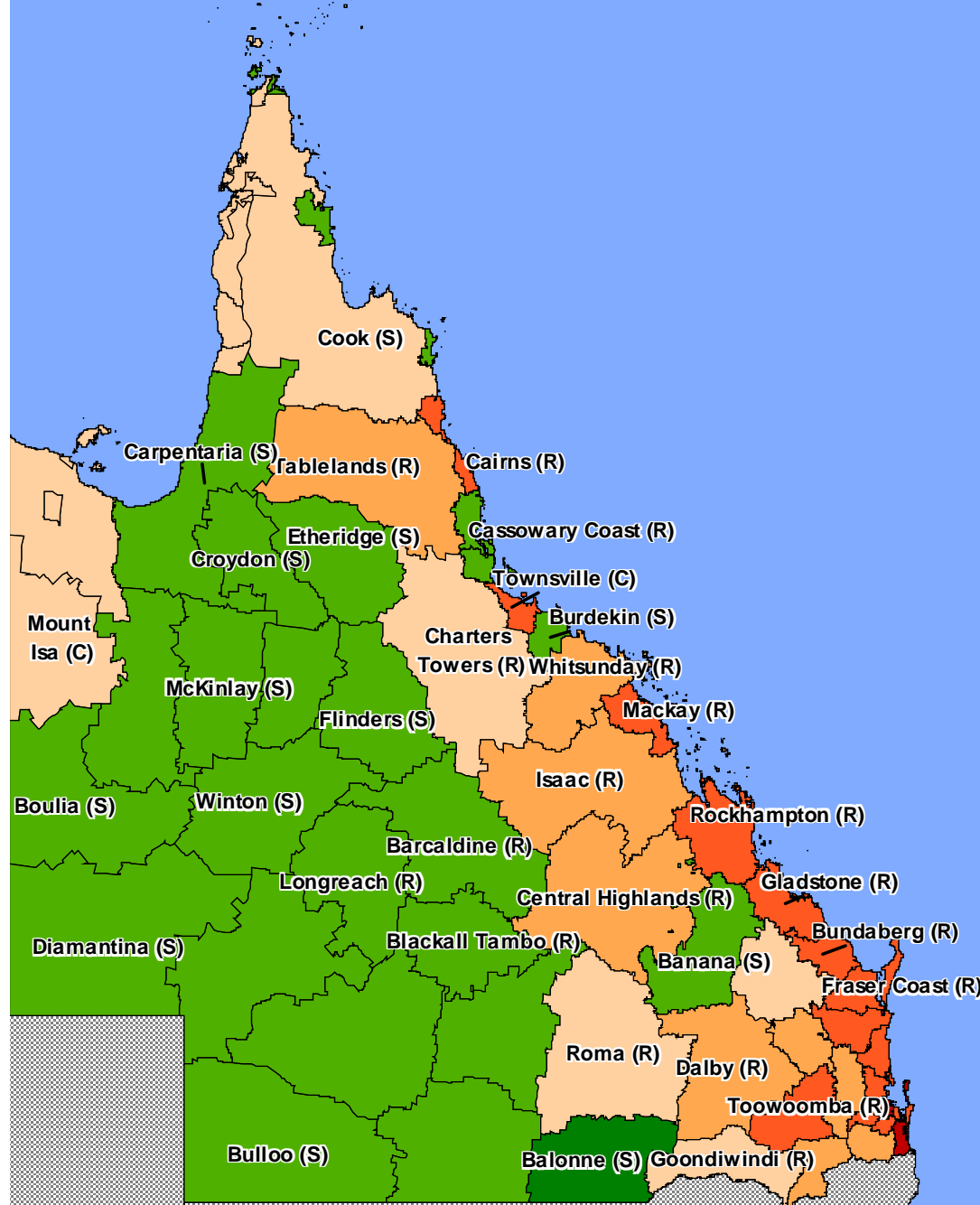
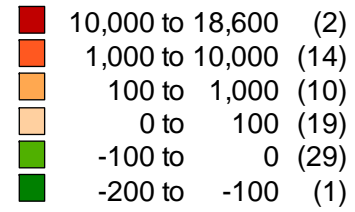
Average Annual Population Change 1981-2006

By reformed LGAs, Source: PIFU Calculations



Average annual population change

2001-2007 by revised local government areas



10 fastest growing LGAs in Queensland

Average annual growth, 2001-2006 and 06-07

Rank	LGA	2001-2006		2006-2007	
		No.	%	No.	%
1	Weipa (T)	171	6.9%	193	6.4%
2	Gold Coast (C)	15,910	3.8%	16,562	3.5%
3	Ipswich (C)	3,376	2.6%	5,026	3.5%
4	Fraser Coast (R)	3,010	3.8%	2,978	3.3%
5	Moreton Bay (R)	9,241	3.0%	10,816	3.3%
6	Cairns (R)	3,882	2.9%	4,598	3.1%
7	Gladstone (R)	1,521	3.1%	1,582	2.9%
8	Townsville (C)	4,033	2.6%	4,529	2.7%
9	Sunshine Coast (R)	9,592	3.6%	7,952	2.7%
10	Lockyer Valley (R)	656	2.2%	828	2.6%

10 largest growing LGAs in Queensland

Average annual growth, 2001-2006 and 2006-2007

Rank	LGA	2001-2006		2006-2007	
		No.	%	No.	%
1	Gold Coast (C)	15,866	3.8%	16,780	3.6%
2	Brisbane (C)	18,922	2.0%	16,641	1.7%
3	Moreton Bay (R)	9,226	3.0%	10,691	3.2%
4	Sunshine Coast (R)	9,583	3.6%	7,966	2.7%
5	Ipswich (C)	3,396	2.6%	4,925	3.5%
6	Cairns (R)	3,889	2.9%	4,565	3.1%
7	Townsville (C)	4,098	2.7%	4,206	2.5%
8	Logan (C)	4,546	1.8%	3,413	1.3%
9	Fraser Coast (R)	3,023	3.8%	2,910	3.3%
10	Redland (C)	2,792	2.3%	2,513	1.9%

10 largest growing LGAs in regional Queensland

Average annual growth, 2001-2006 and 06-07

Rank	LGA	2001-2006		2006-2007	
		No.	%	No.	%
1	Cairns (R)	3,882	2.9%	4,598	3.1%
2	Townsville (C)	4,033	2.6%	4,529	2.7%
3	Fraser Coast (R)	3,010	3.8%	2,978	3.3%
4	Mackay (R)	3,258	3.3%	2,241	2.1%
5	Rockhampton (R)	1,881	1.8%	2,219	2.1%
6	Bundaberg (R)	1,757	2.1%	2,084	2.4%
7	Gladstone (R)	1,521	3.1%	1,582	2.9%
8	Gympie (R)	1,063	2.6%	967	2.2%
9	Tablelands (R)	565	1.3%	723	1.7%
10	Whitsunday (R)	678	2.3%	661	2.1%

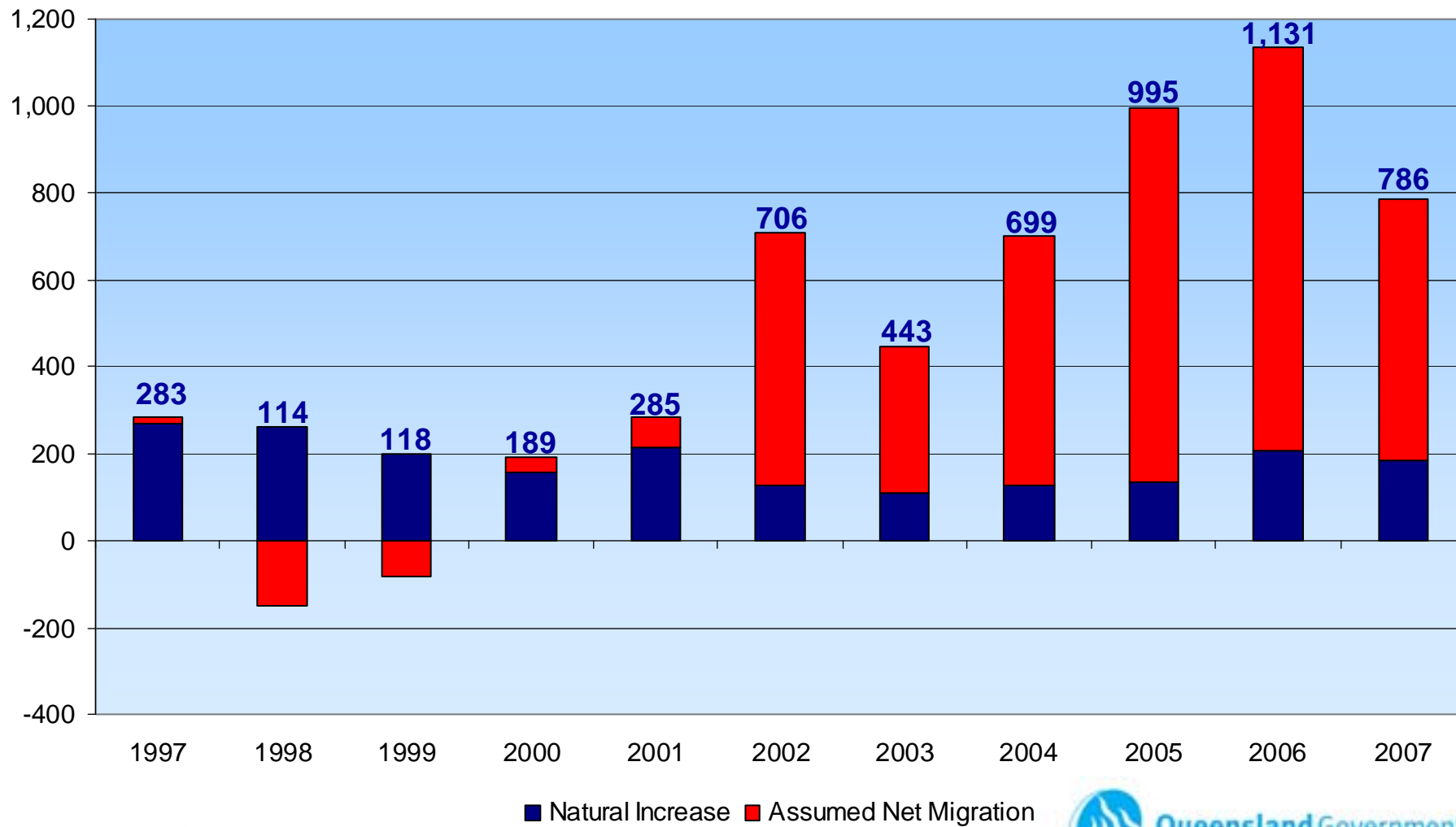


How much notice do we take of patterns of past growth?

- We consider all the data
- We look at the longer term (25 years), recent past (last two intercensal periods 1996-2001 and 2001-2006) and the immediate past (2006-2007)
- We try to isolate the trends and unpick recent patterns for the main drivers of growth
- For example, we try to determine if an area is growing because people are moving there for jobs or lifestyle reasons
- Or, if an area is not growing because there is movement out of the area and deaths exceed births



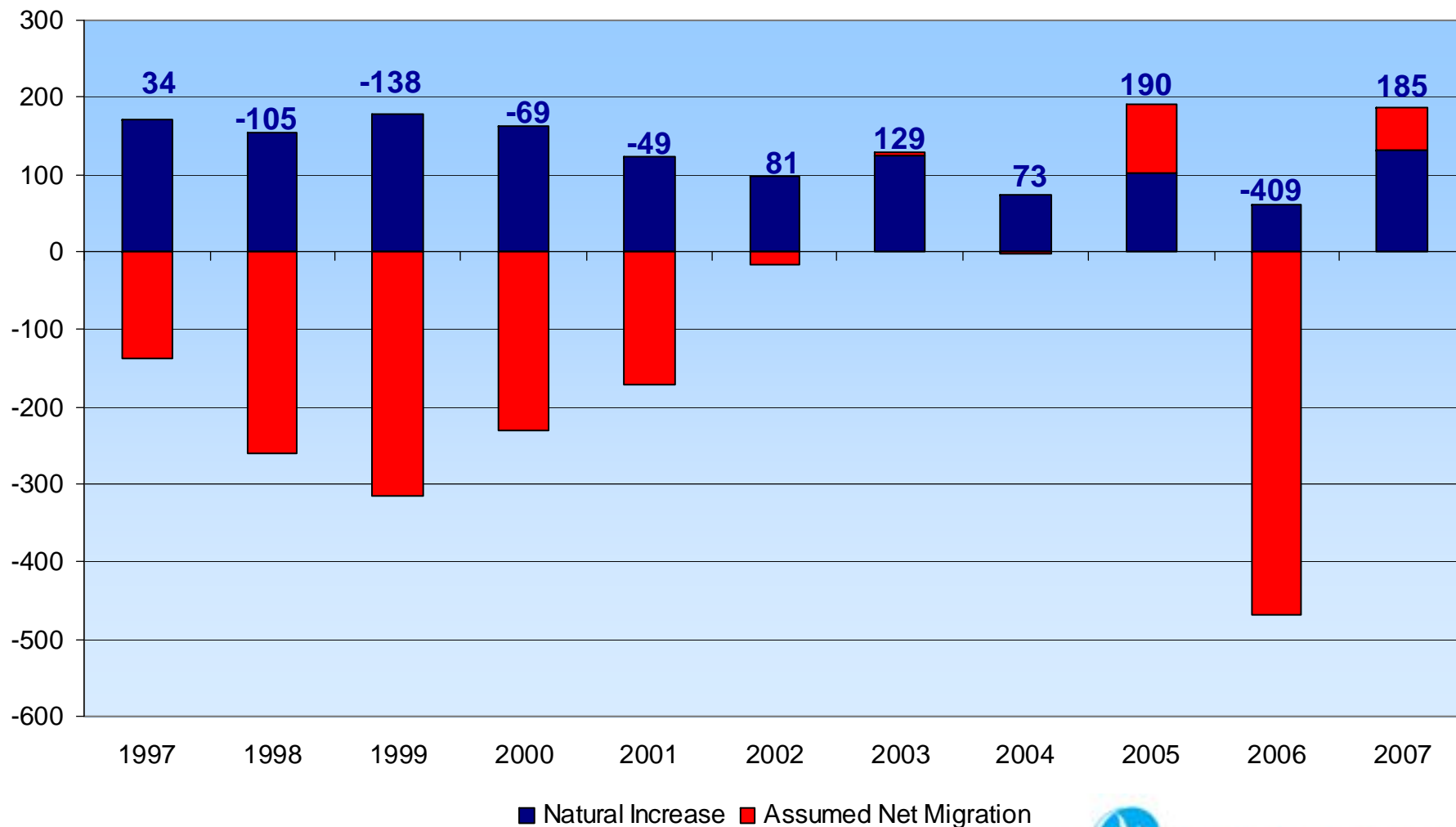
Bundaberg City



■ Natural Increase ■ Assumed Net Migration

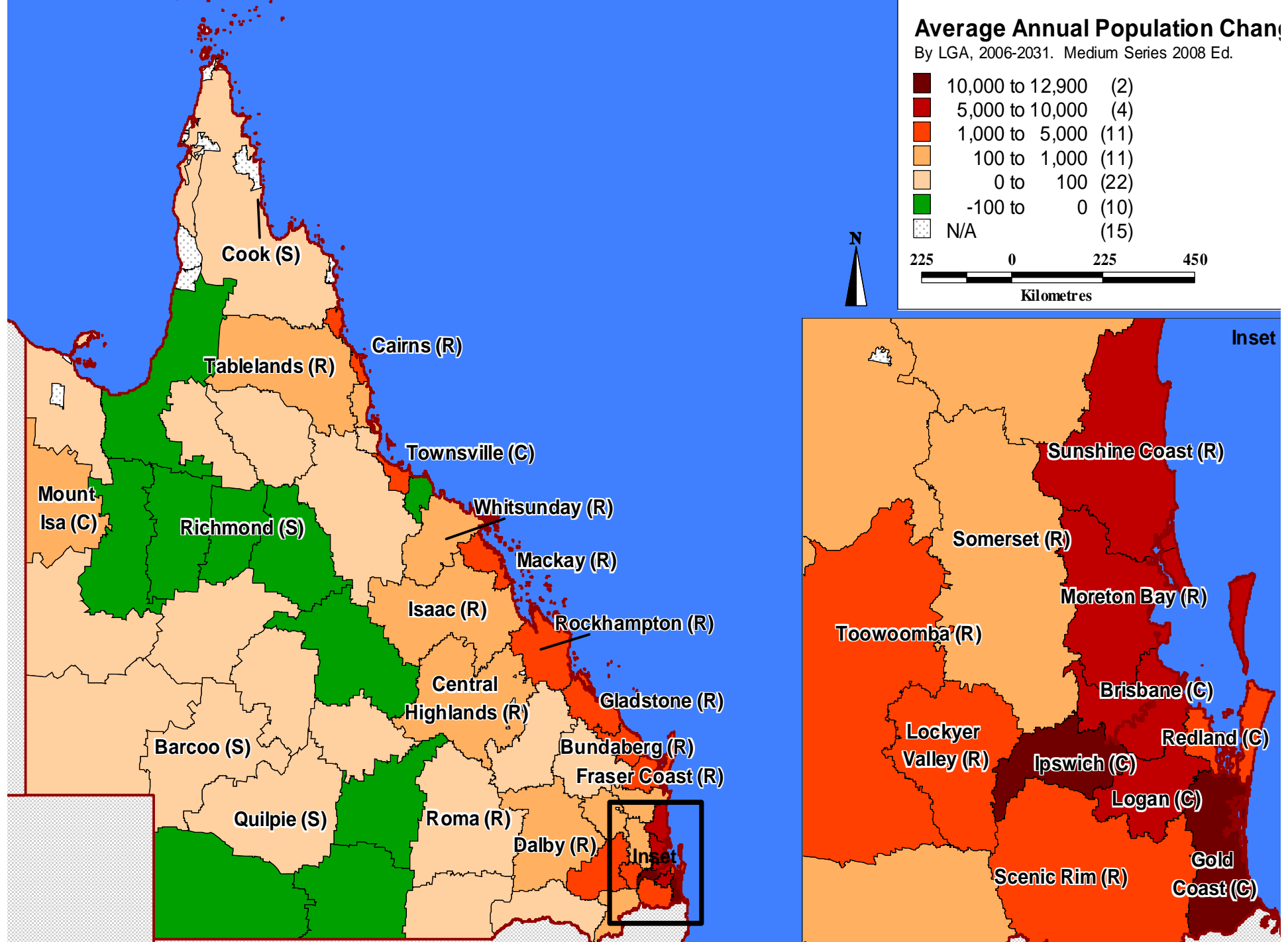
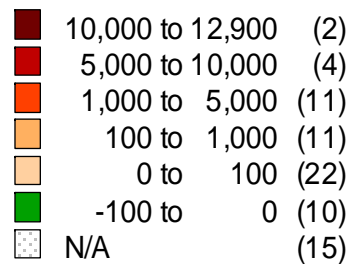


Johnstone Shire



Average Annual Population Change

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



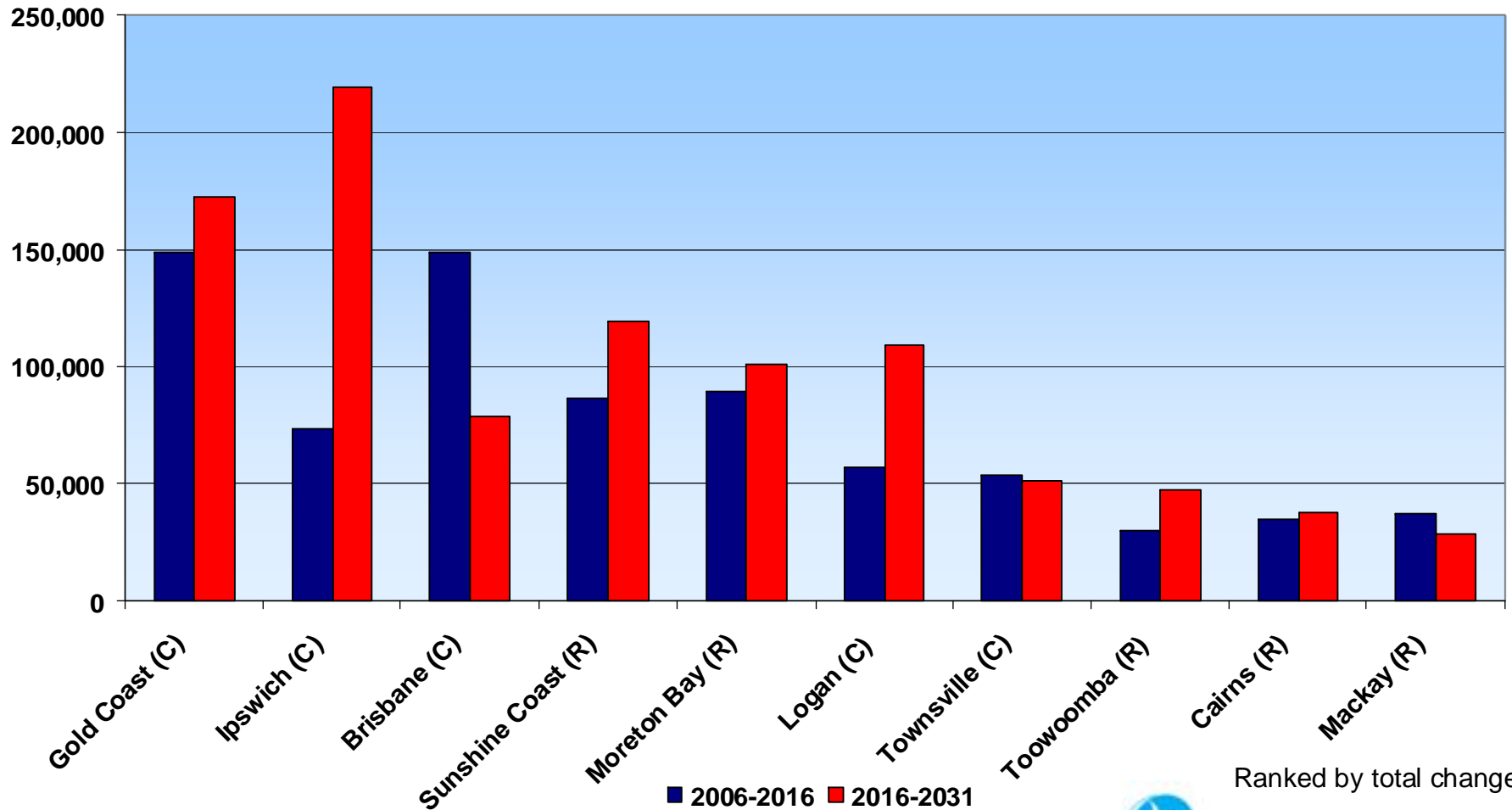
10 largest growing LGAs in Queensland

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

10 largest growing LGAs in Queensland

Average annual growth, 2006-2016

Rank	LGA	2006-2011		2011-2016	
		No.	%	No.	%
1	Brisbane (C)	15,808	1.5	14,252	1.3
2	Gold Coast (C)	15,142	3.1	14,685	2.6
3	Moreton Bay (R)	8,817	2.5	9,039	2.3
4	Sunshine Coast (R)	8,916	2.9	8,359	2.3
5	Ipswich (C)	5,451	3.6	9,226	4.9
6	Logan (C)	5,097	1.9	6,260	2.1
7	Townsville (C)	5,210	3.0	5,466	2.7
8	Mackay (R)	3,667	3.2	3,759	2.8
9	Cairns (R)	4,152	2.7	2,877	1.7
10	Toowoomba (R)	2,998	1.9	2,973	1.7

10 largest growing 'old' LGAs in Queensland

Average annual growth, 2006-2016

Rank	LGA	2006-2011		2011-2016	
		No.	%	No.	%
1	Gold Coast (C)	16,232	3.0	16,102	2.6
2	Brisbane (C)	15,808	1.5	14,252	1.3
3	Ipswich (C)	5,472	3.5	9,266	4.9
4	Maroochy (S)	4,765	2.9	4,228	2.3
5	Caboolture (S)	4,262	3.0	4,386	2.7
6	Pine Rivers (S)	4,008	2.6	4,122	2.4
7	Caloundra (C)	3,423	3.4	3,637	3.1
8	Cairns (C)	4,063	2.8	2,792	1.7
9	Beaudesert (S)	2,749	3.9	3,762	4.4
10	Mackay (C)	3,134	3.3	3,223	2.9



South East Queensland*

- 2.77m people in 2007
- 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
- Range = 4.07m (low) to 4.96m (high)
 - Average growth (2006-2031) – 49,850 (low) to 85,100 (high)

* 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

- 1.34m people in 2007
- 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
- Past decades 10 yrs to 1991 – 17,435,
10 yrs to 2001 – 14,650
- Future decades 10 yrs to 2011 – 28,550,
10 yrs to 2021 – 25,960



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



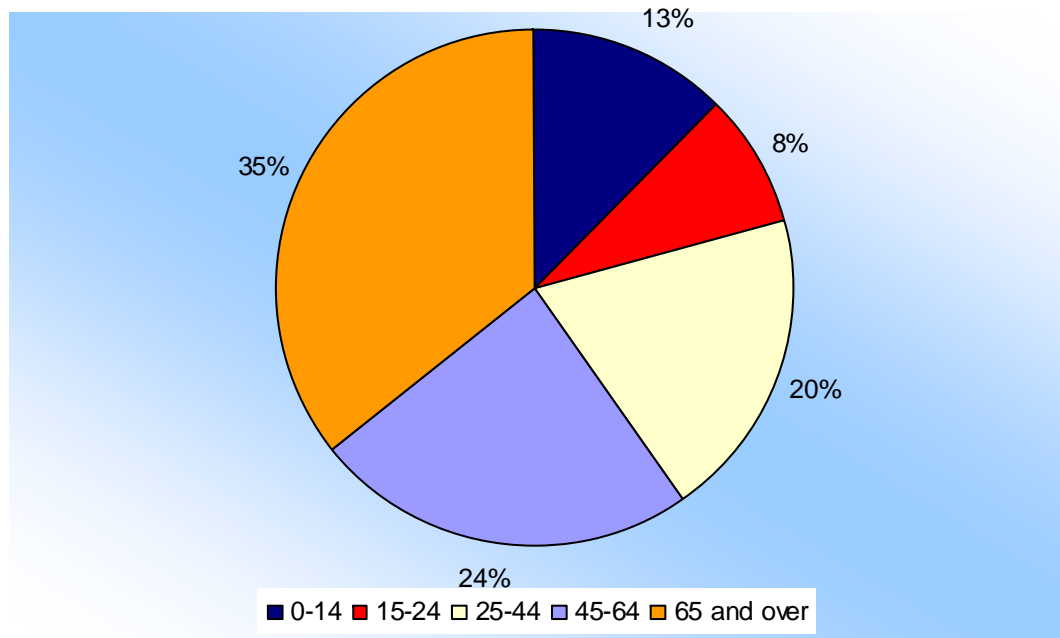
Western Regional Queensland

- 74,876 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



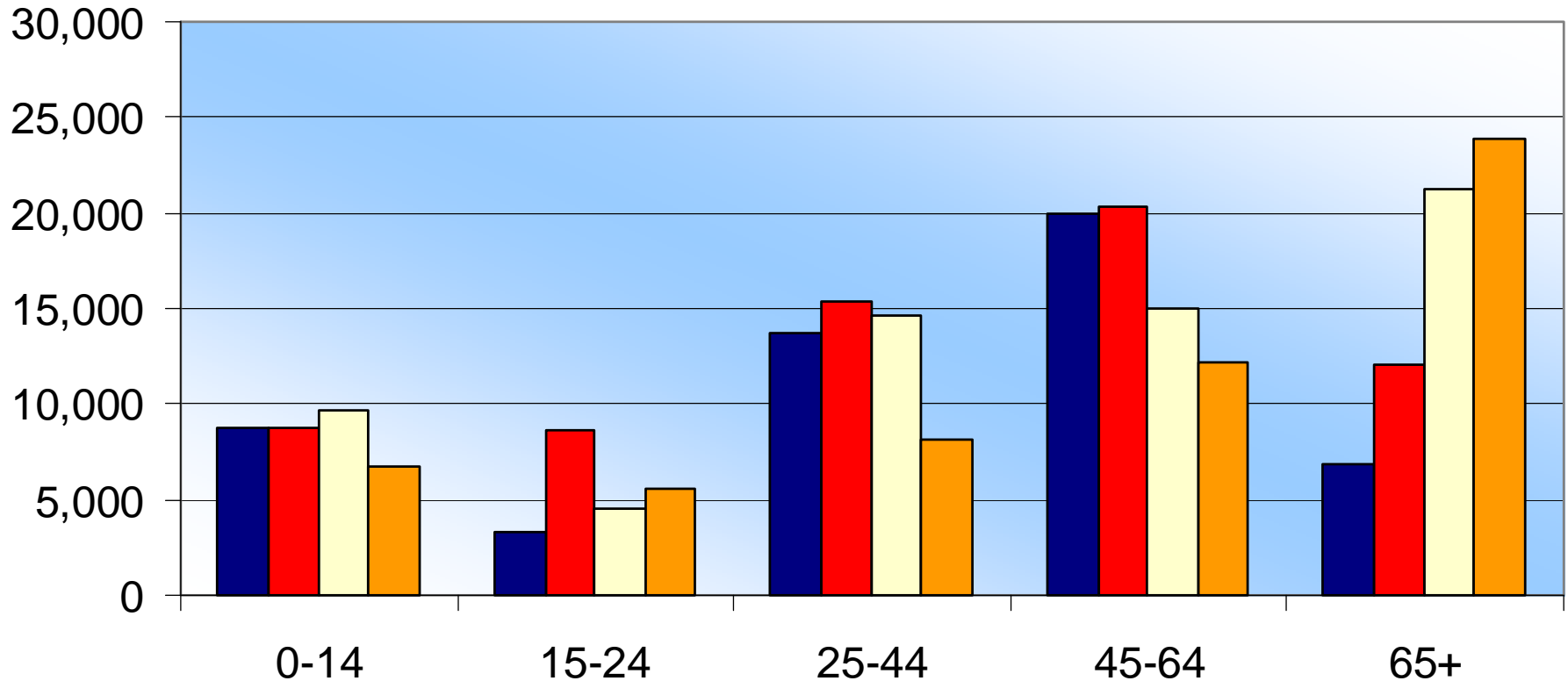
Projected changes to Queensland's age structure

- 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





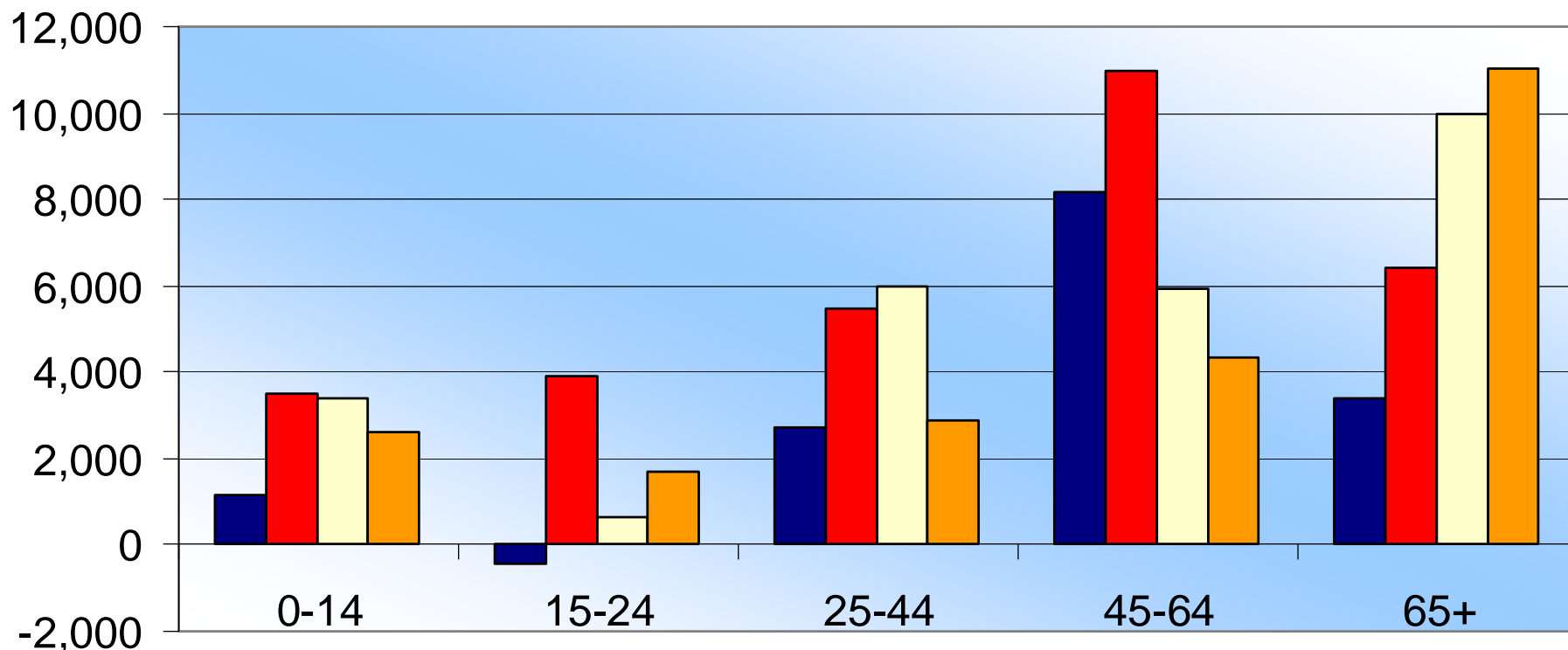
Past and projected change to SEQ age structure



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



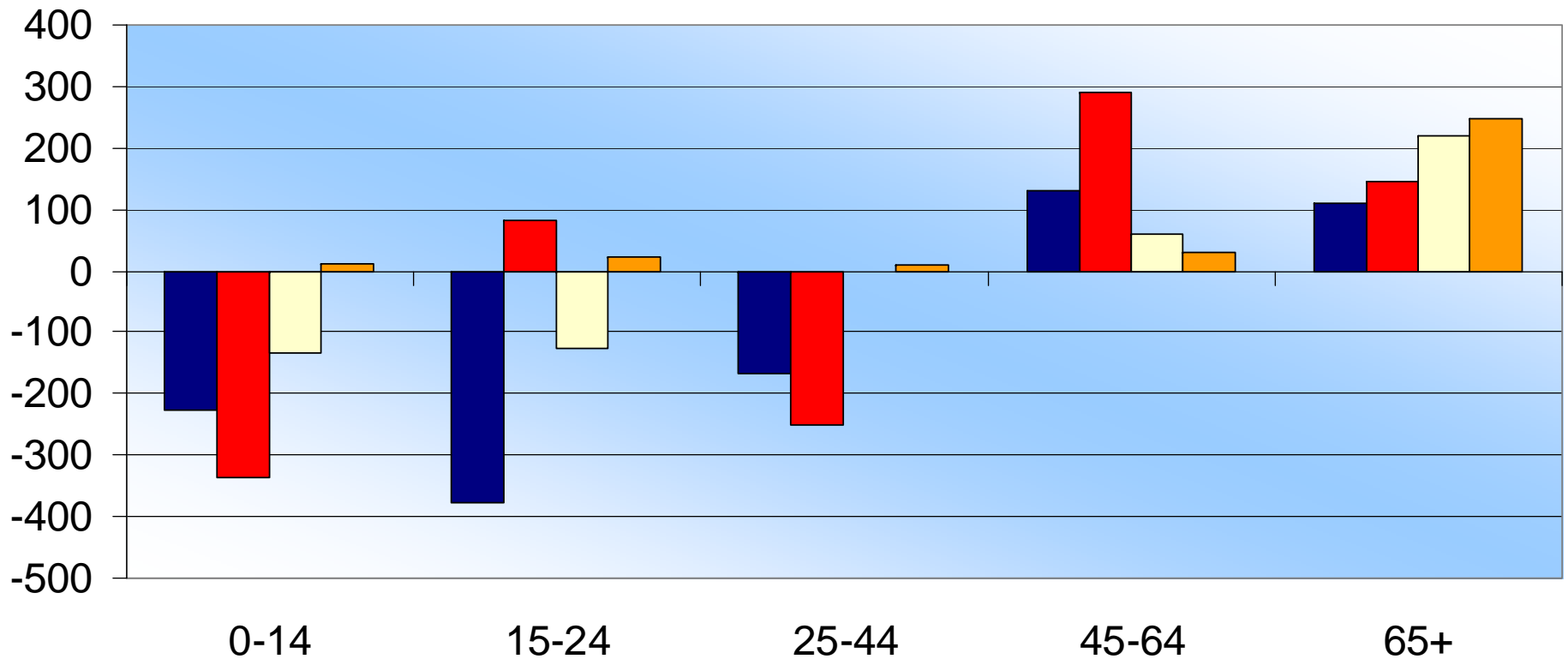
Past and projected change to Eastern Regional Queensland age structure



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



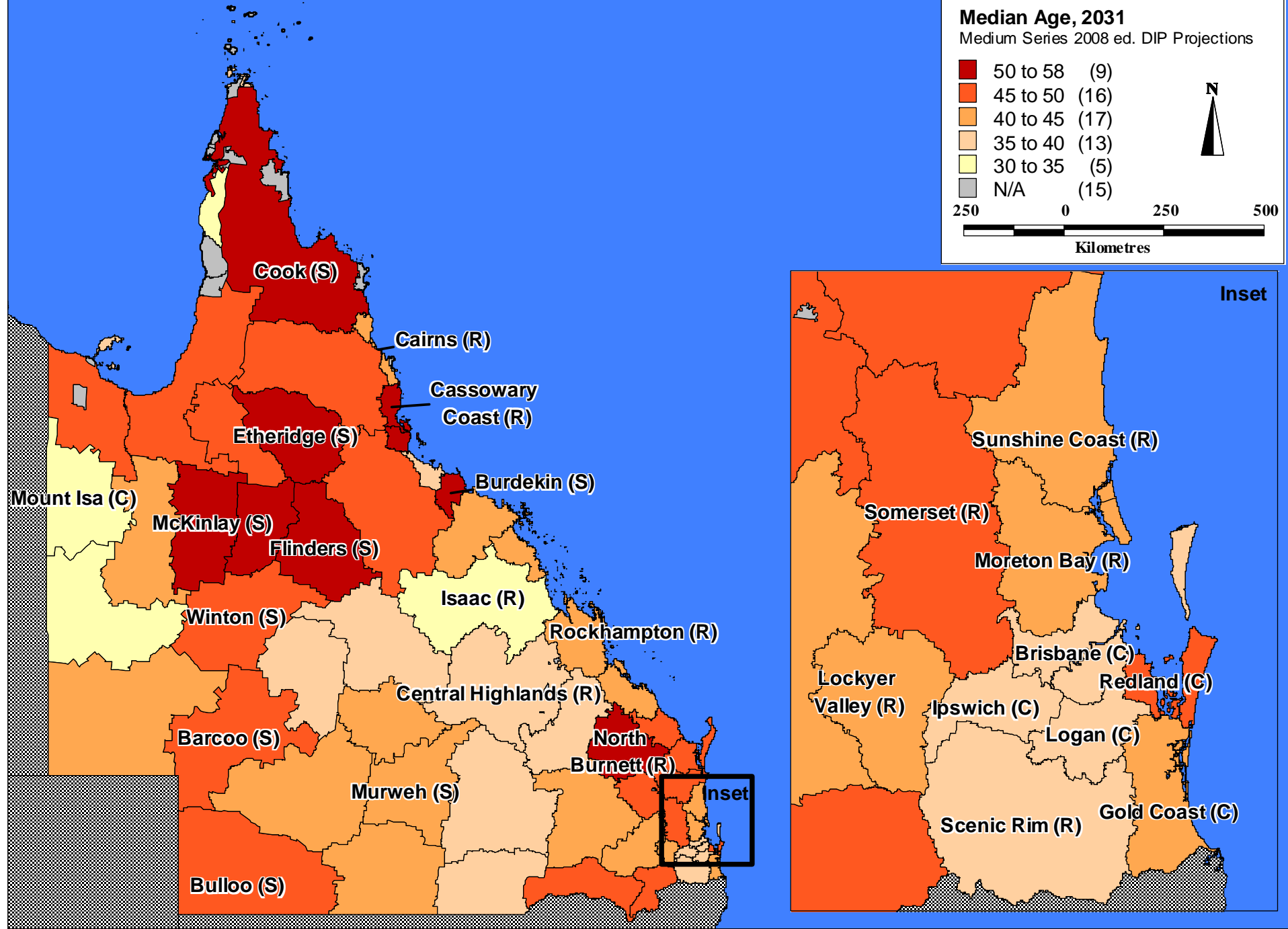
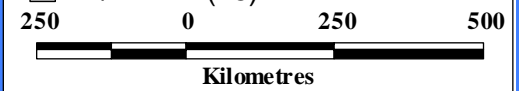
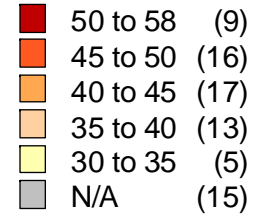
Past and projected change to Western Regional Queensland age structure



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

Median Age, 2031

Medium Series 2008 ed. DIP Projections



Relative change in persons over 65, 2006-2031

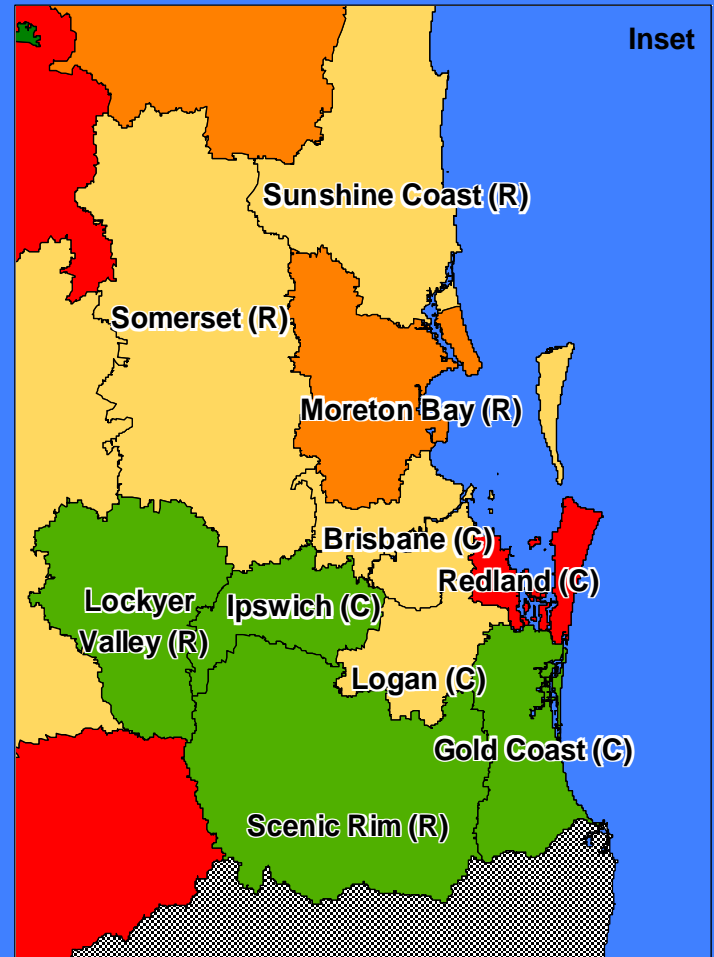
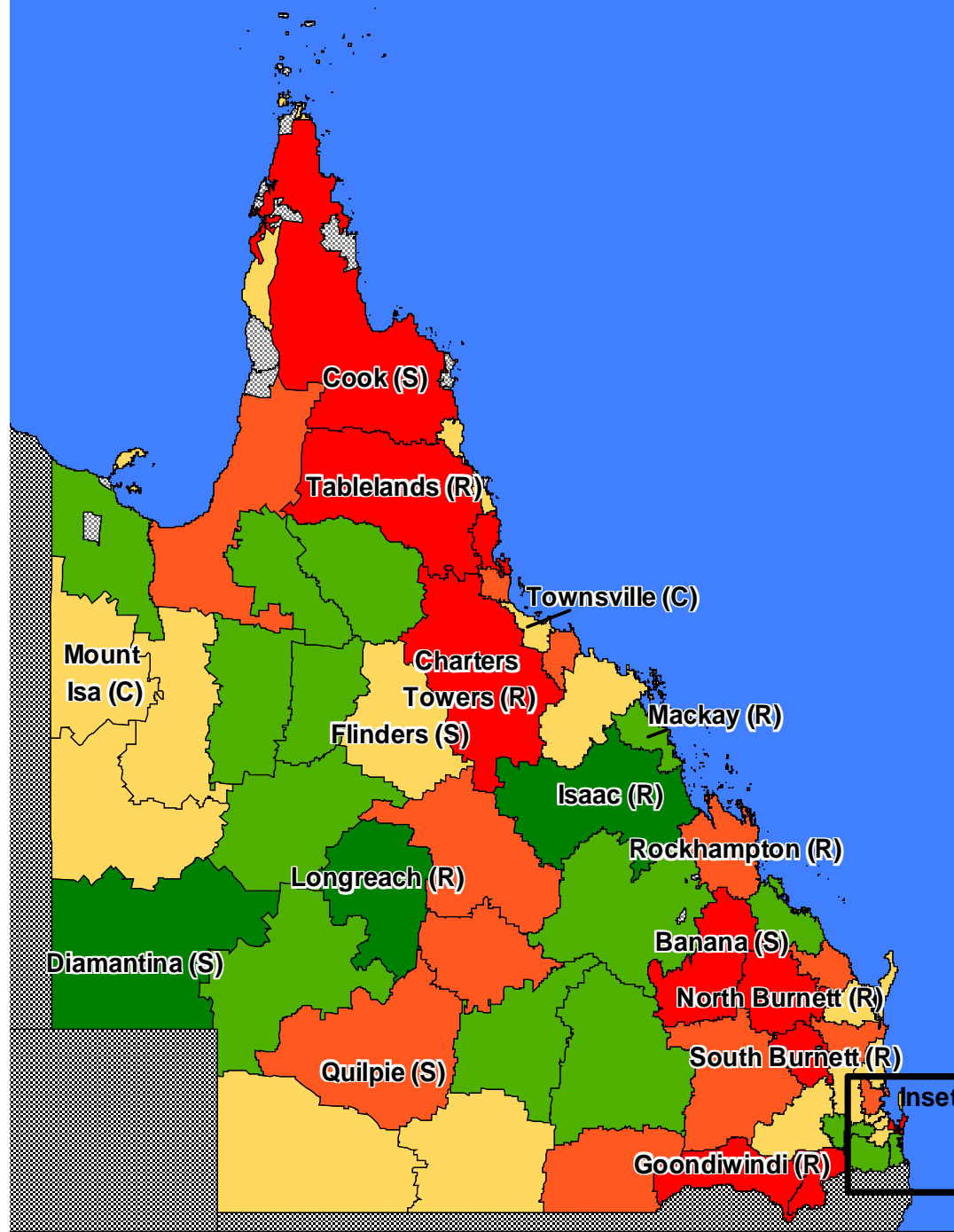
Location Quotient Analysis

- Well above average: 1.75 to 2.27 (10)
- Above average: 1.1 to 1.75 (12)
- Average: 0.9 to 1.1 (18)
- Below average: 0.5 to 0.9 (17)
- Well below average: 0 to 0.5 (3)



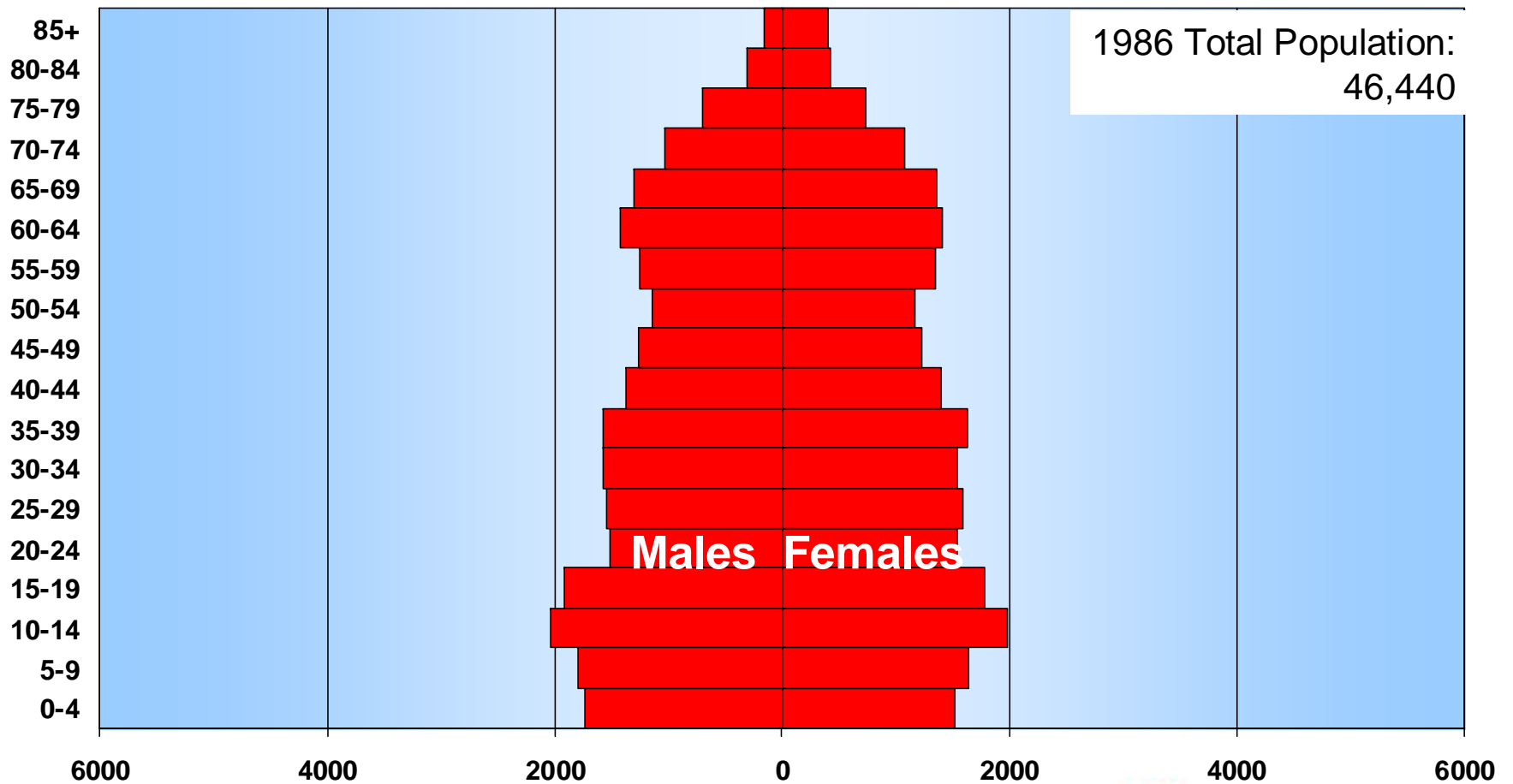
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Kilometres



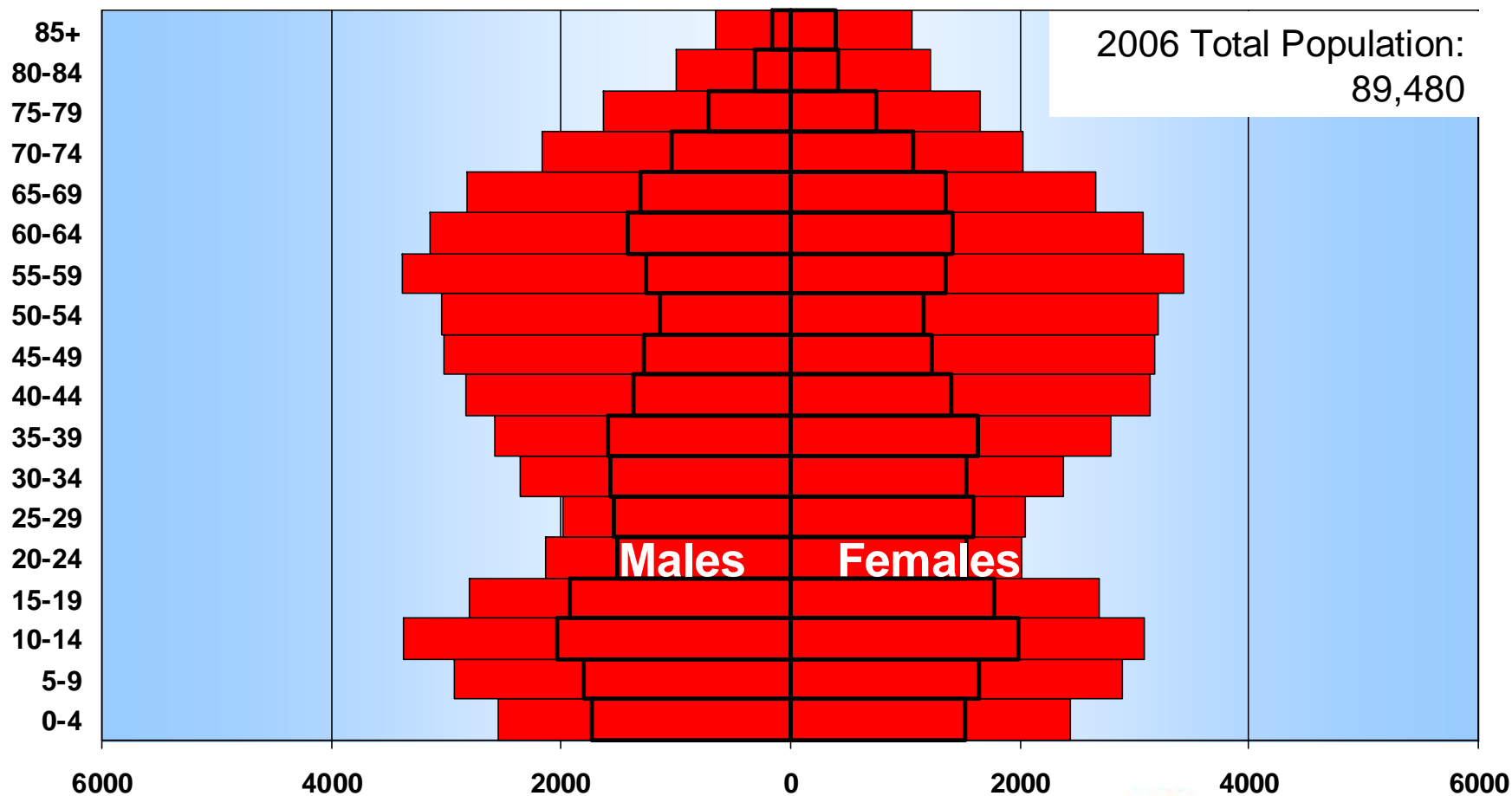


1986 population pyramid for Fraser Coast (R)



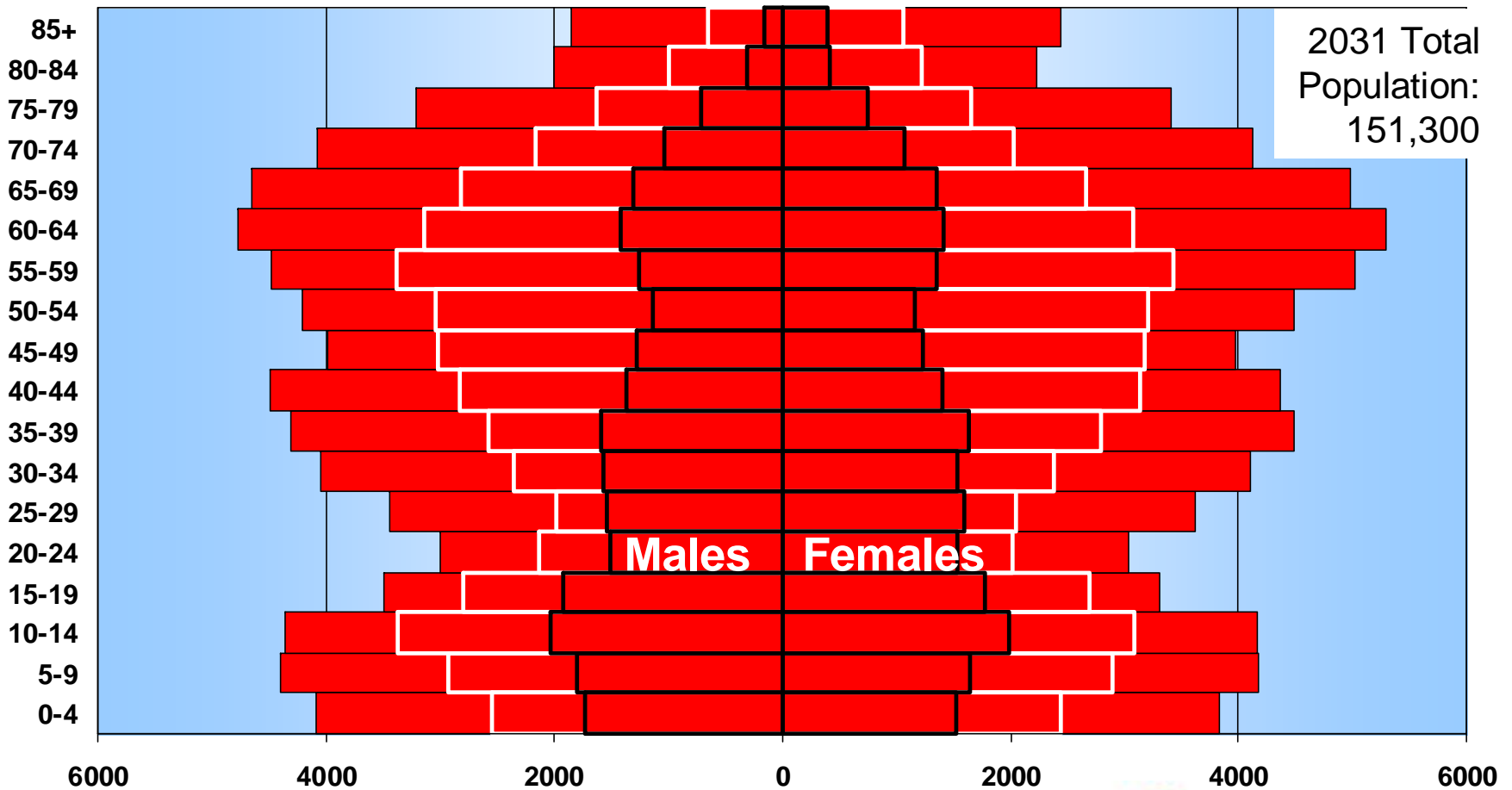


2006 population pyramid for Fraser Coast (R)



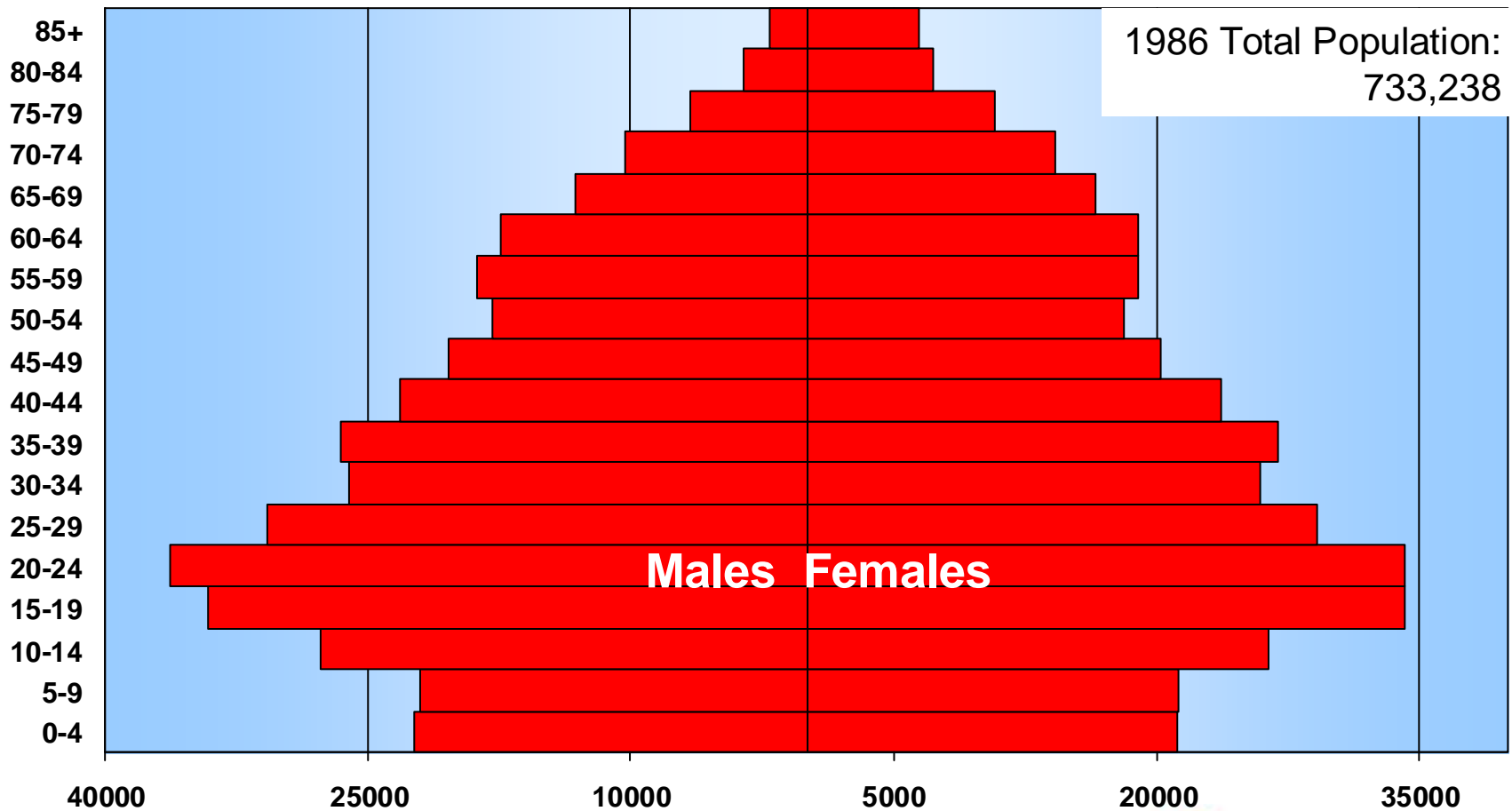


2031 population pyramid for Fraser Coast (R)



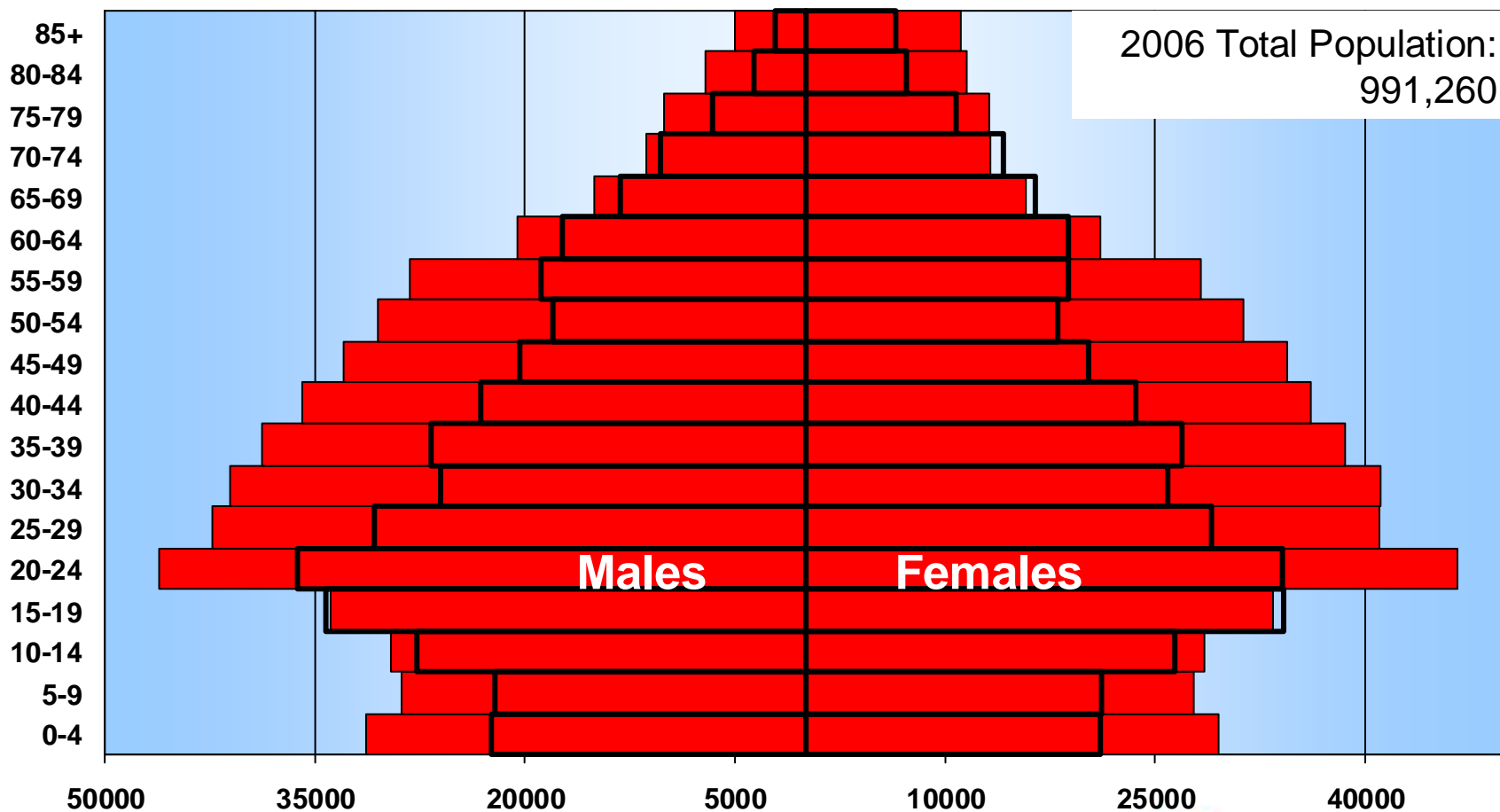


1986 population pyramid for Brisbane (C)



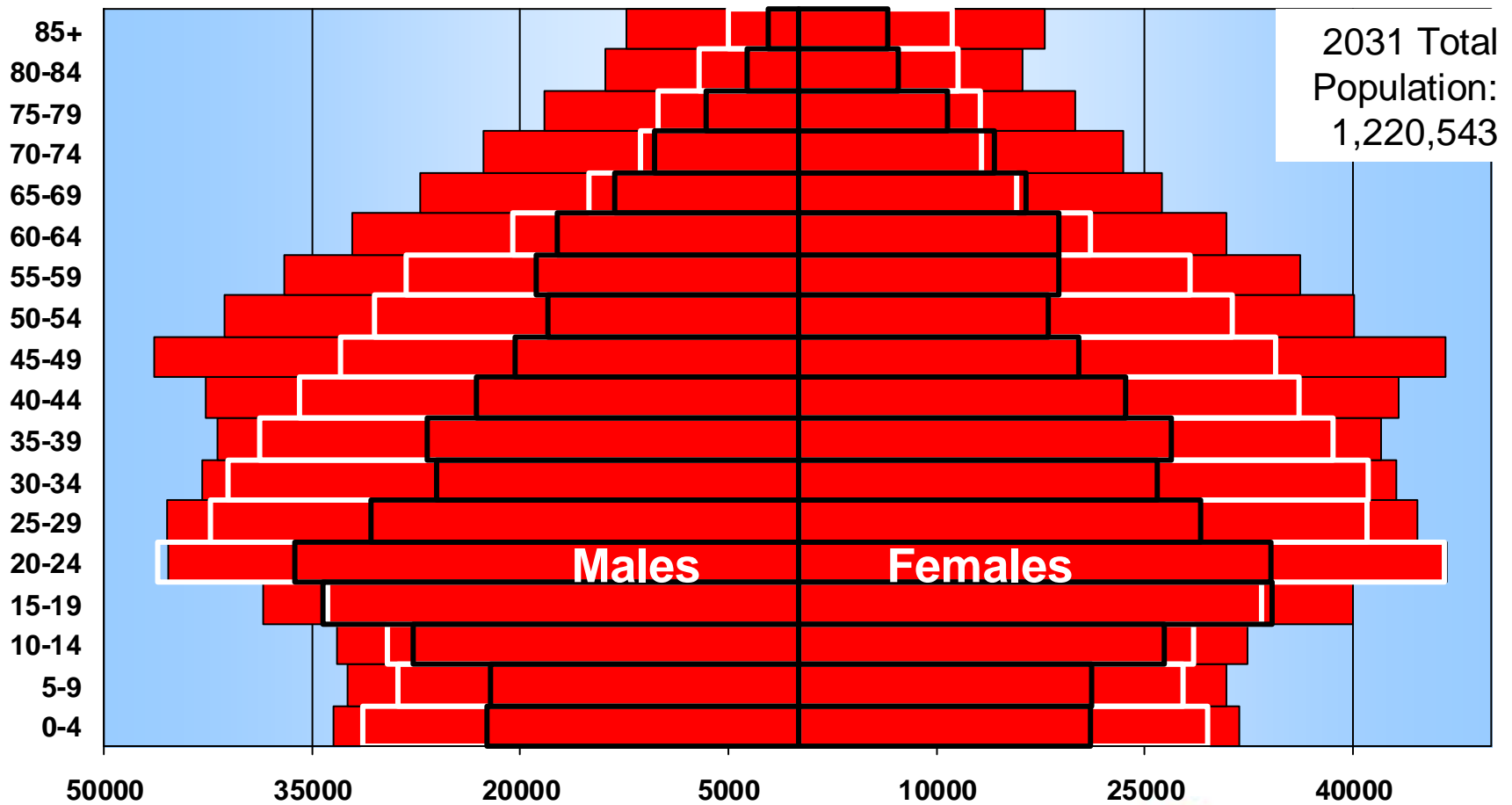


2006 population pyramid for Brisbane (C)





2031 population pyramid for Brisbane (C)





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



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Panel session

- Mr Michael Papageorgiou, Divisional Manager, City Planning and Sustainability, Brisbane City Council
- Mr Barry Ashcroft, Retirement Villages Manager, Aged Care Queensland
- Ms Vanessa Bennett, Director, SGS Economics and Planning
- Mr Ross Barker, Director, Planning Information and Forecasting Division, Department of Infrastructure and Planning



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