

Demographic forecasts for Queensland

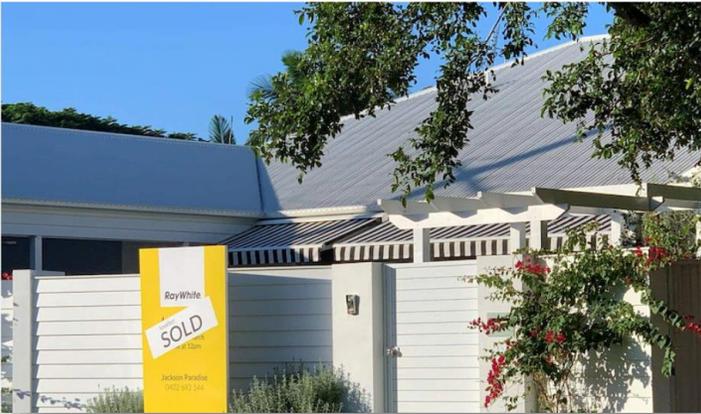
Insights from our
State and SA4 forecasts

25 November 2021

ANALYSIS

House prices in Australia are soaring, but not because there aren't enough homes

The Conversation / By Peter Martin
Posted Wed 14 Apr 2021 at 5:00am, updated Mon 24 May 2021 at 4:57pm



NEWS

'Transformative or transient' — will the COVID-driven 'great migration' to regional Australia last?

5 days ago

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Is there a Covid baby boom? Experts disagree but Australia's maternity wards are straining

Demand for maternity services is up as much as 20% in some parts of Victoria, prompting fears the system is 'at breaking point'



📷 'Lockdown highlighted how important family is ... so we thought we'd start our own': Madeline Kaio with husband Chris Williams and baby Estée. Photograph: Madeline Kaio

Queensland's population

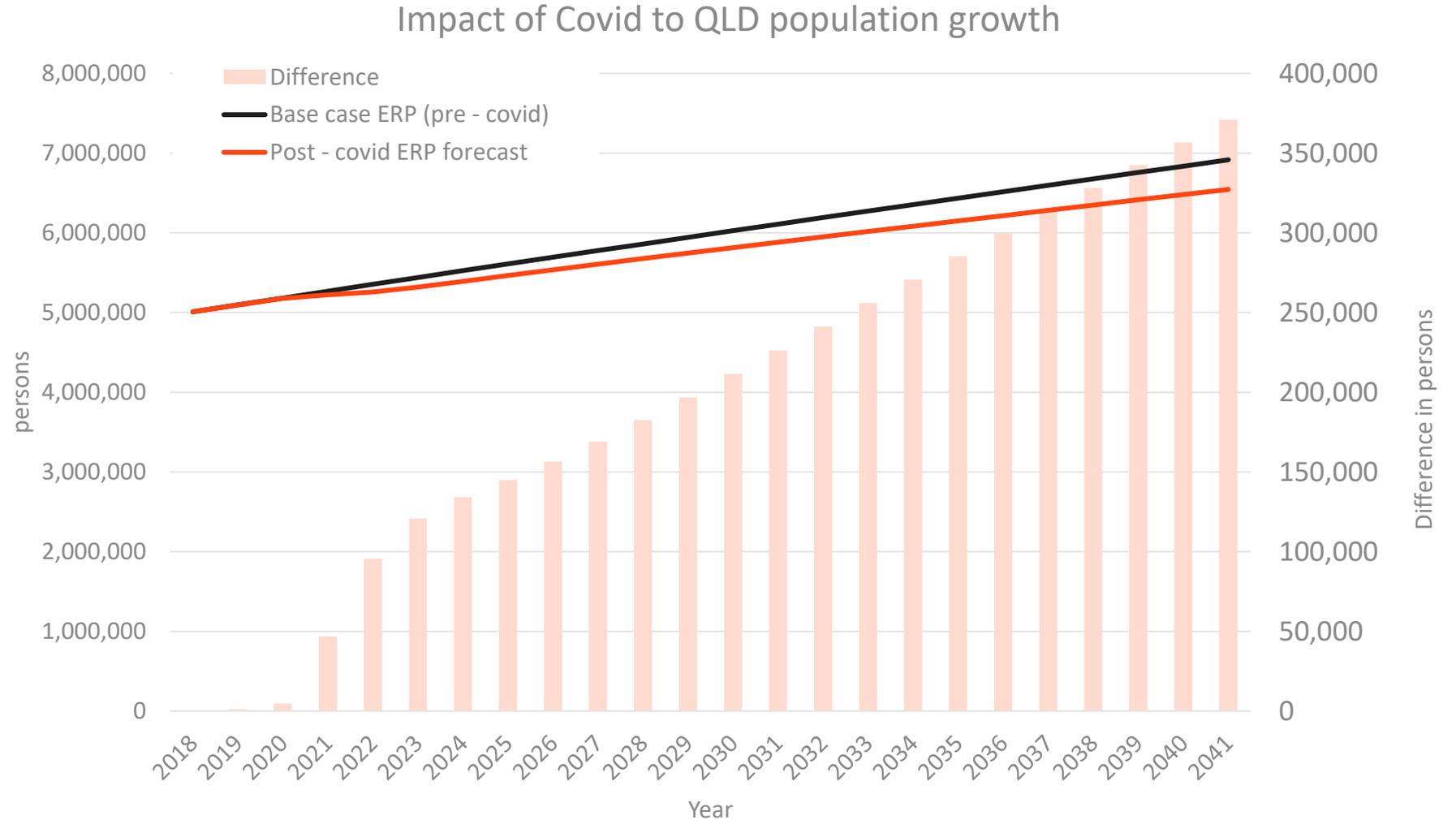


Population growth of 1,700,000 persons
across Queensland between 2016 and 2041

By comparison, the previous 25 years (1991 to 2016)
experienced population growth of 1,885,000 persons

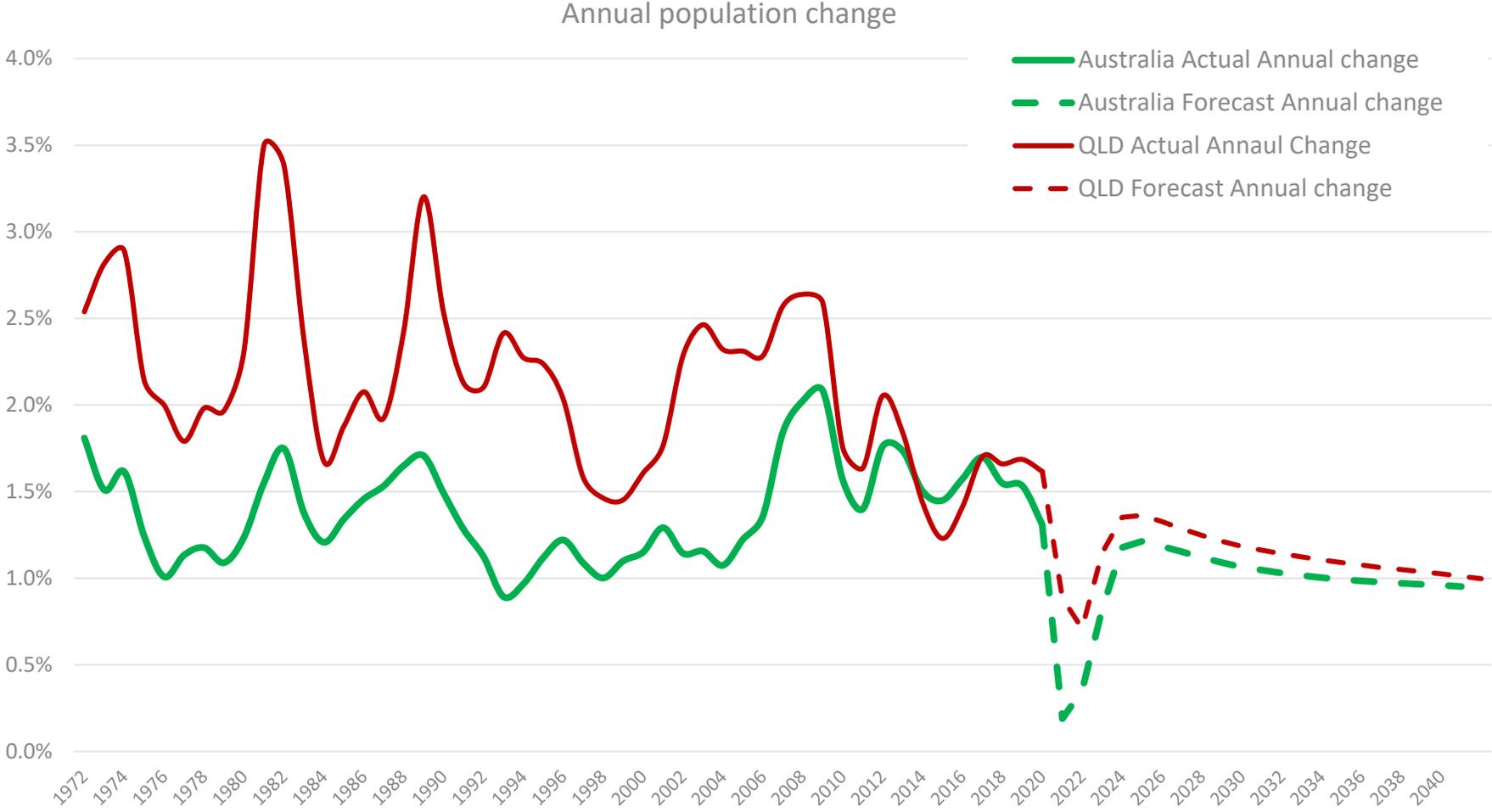
Covid's population whack..

- Border closures due to Covid have had a major impact on the population forecasts
- Qld is expected to have 370,000 fewer people in 2041 compared to pre covid expectations



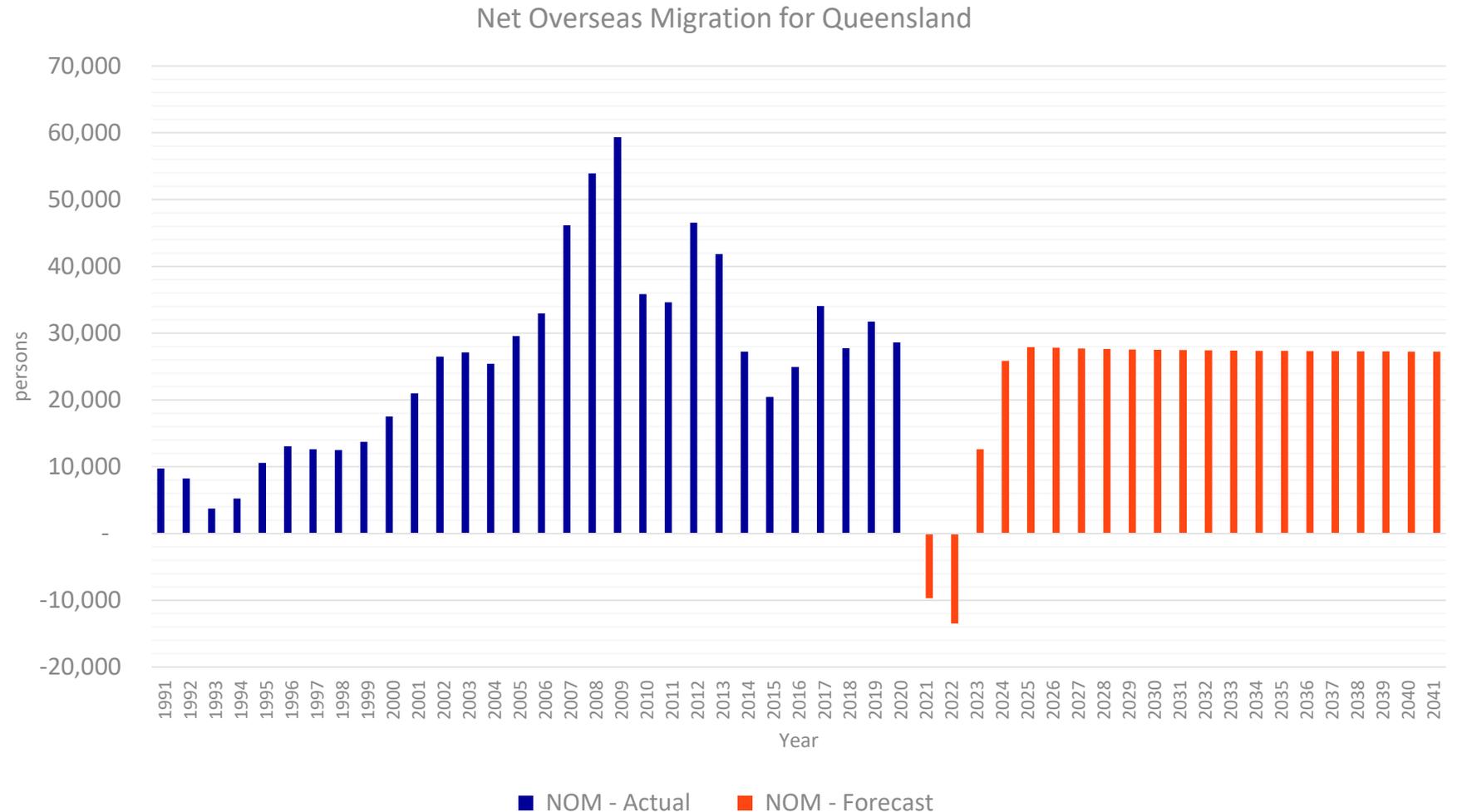
Queensland is still forecast to grow faster than Australia...

- From the early 1970s to the 2010s, Queensland grew at a higher rate than Australia.
- The impacts of COVID are not felt as strongly in Queensland as they are for the Australia.
- Our forecast assumptions have Queensland returning to a 1% annual growth rate, growing slightly faster than Australia overall.



Net overseas migration a major driver of growth

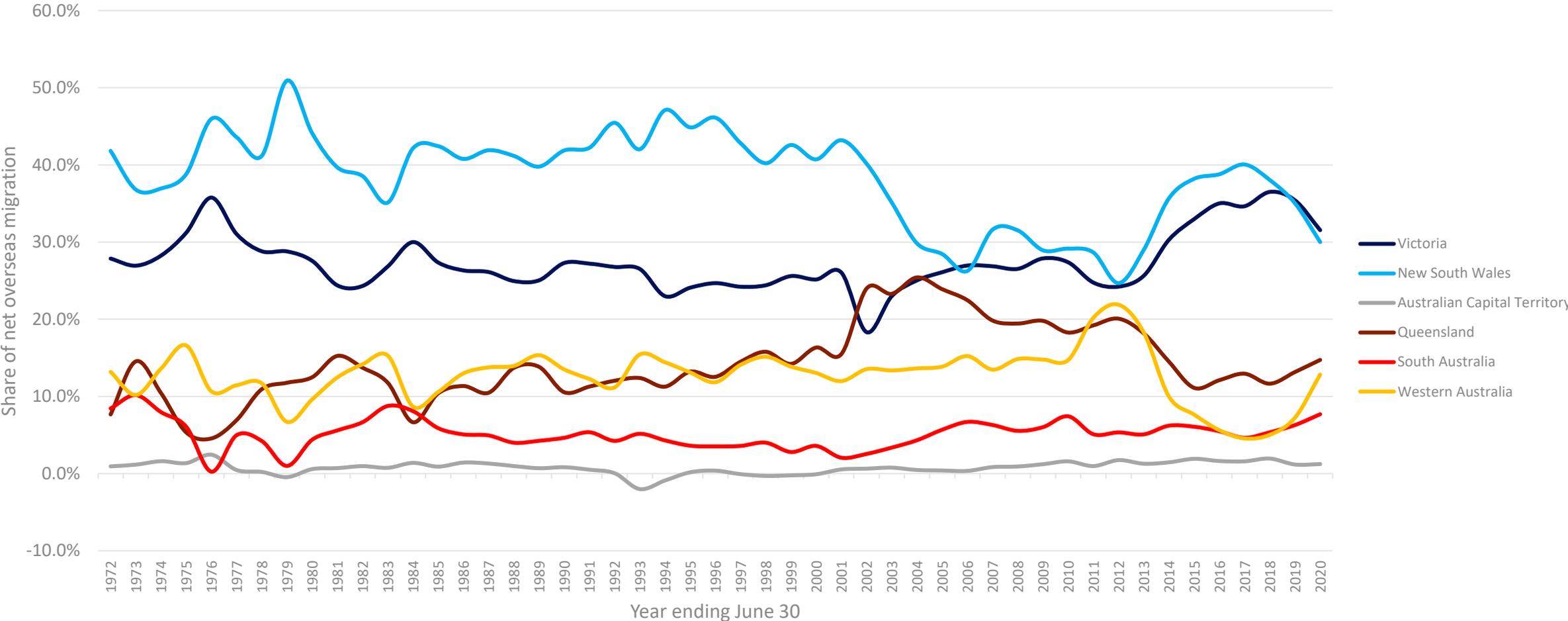
- ▣ Prior to the pandemic, QLD was gaining almost 30,000 persons through NOM
- ▣ In 2020 and 2021 there was a net loss of overseas migration, meaning more people were leaving than coming to the State.
- ▣ The impacts of Covid are felt less in QLD than States such as NSW and VIC which have traditionally drawn a higher number of overseas migrants.



Share of net overseas migration

Major states, 1972-2020

Share of net overseas migration, Major States of Australia 1972 to 2020



Share of net overseas migration

States/Territories, 2021

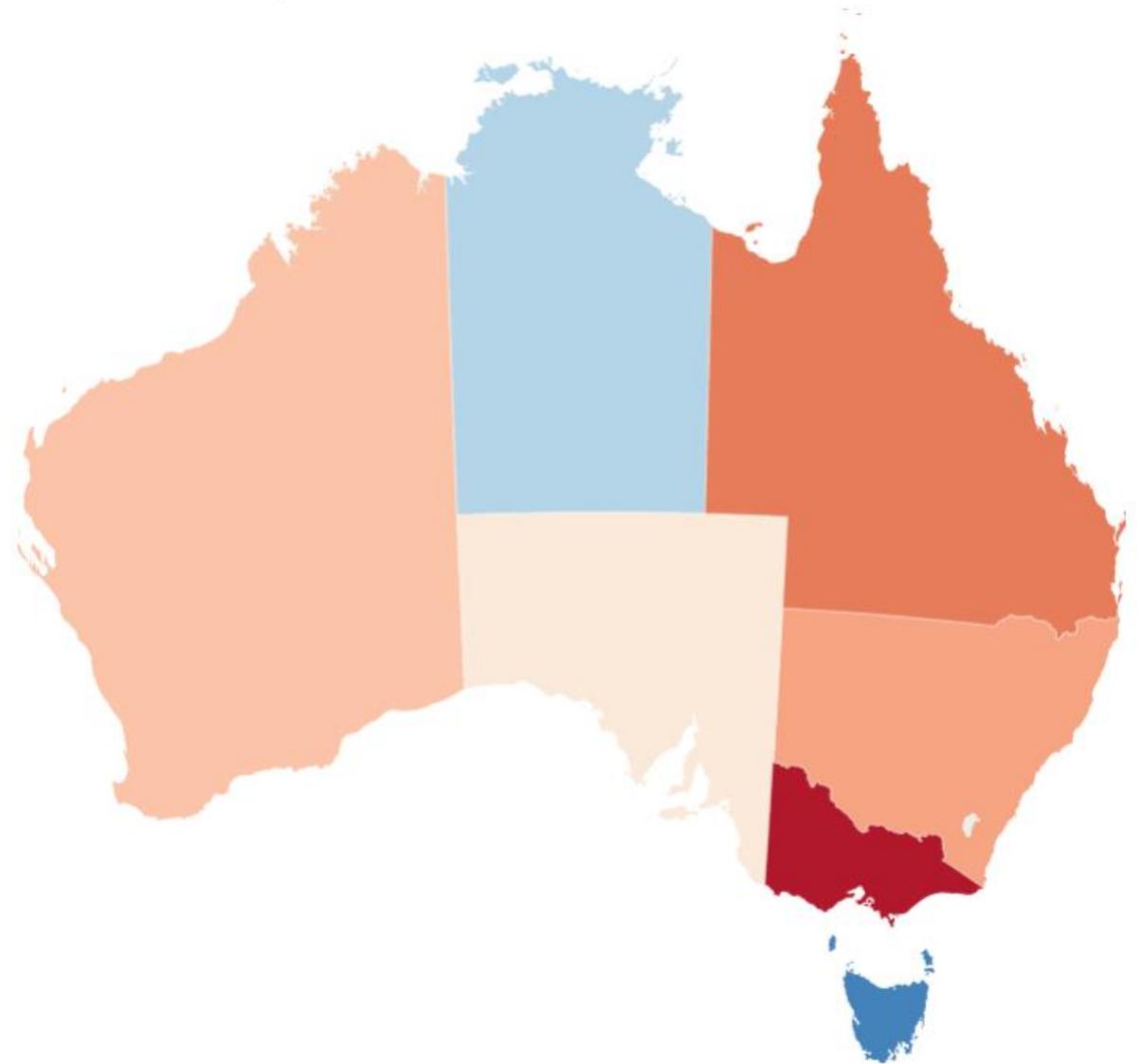
Net Overseas Migration
(persons)



-301 -51,009

State	Persons	Share
Victoria	-51,009	59%
New South Wales	-9,580	11%
Australian Capital Territory	-2,654	3%
Queensland	-14,513	17%
South Australia	-3,429	4%
Western Australia	-5,328	6%
Tasmania	-301	0%
Northern Territory	-307	0%
Total	-87,095	100%

Note: 2021 includes 3 quarters of data.*

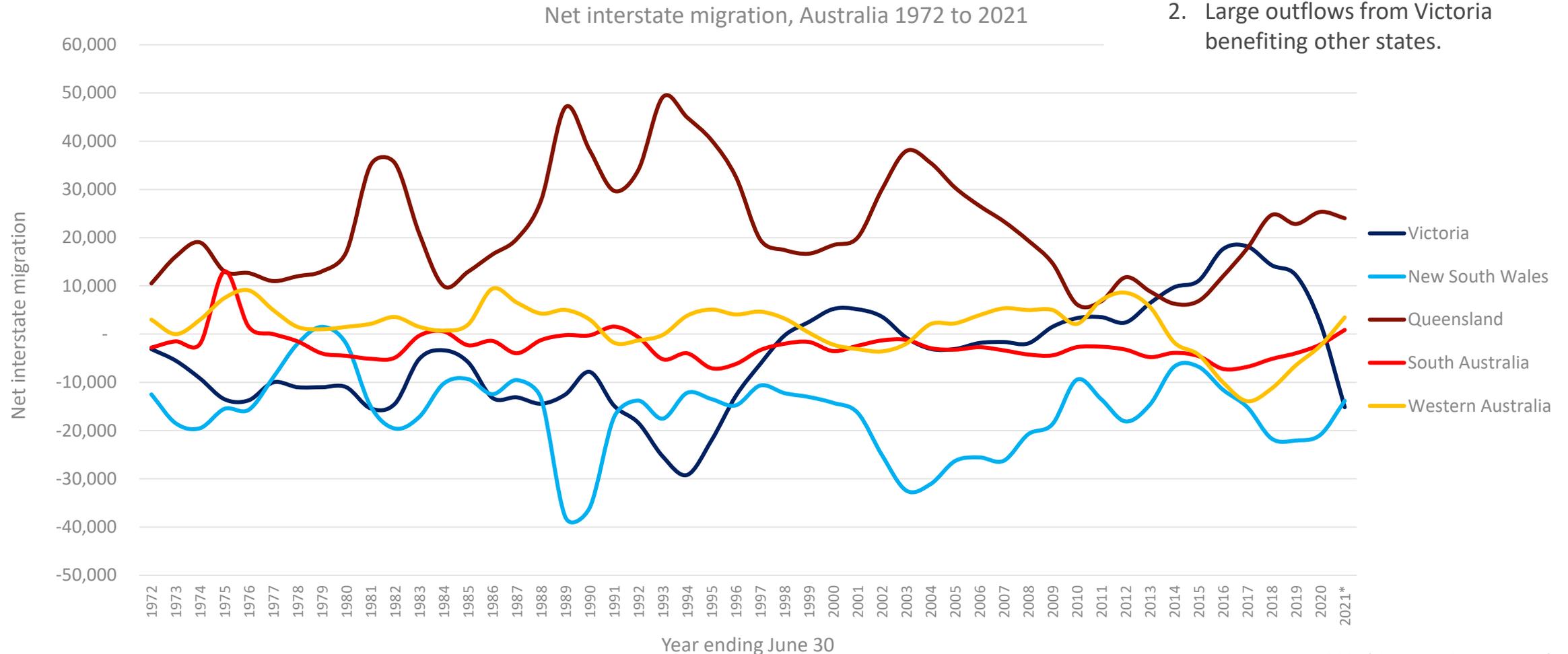


Net interstate migration

Australia 1972-2021

Since 2014, Queensland has returned to more historic rates of Net Interstate Migration, generally at the expense of NSW:

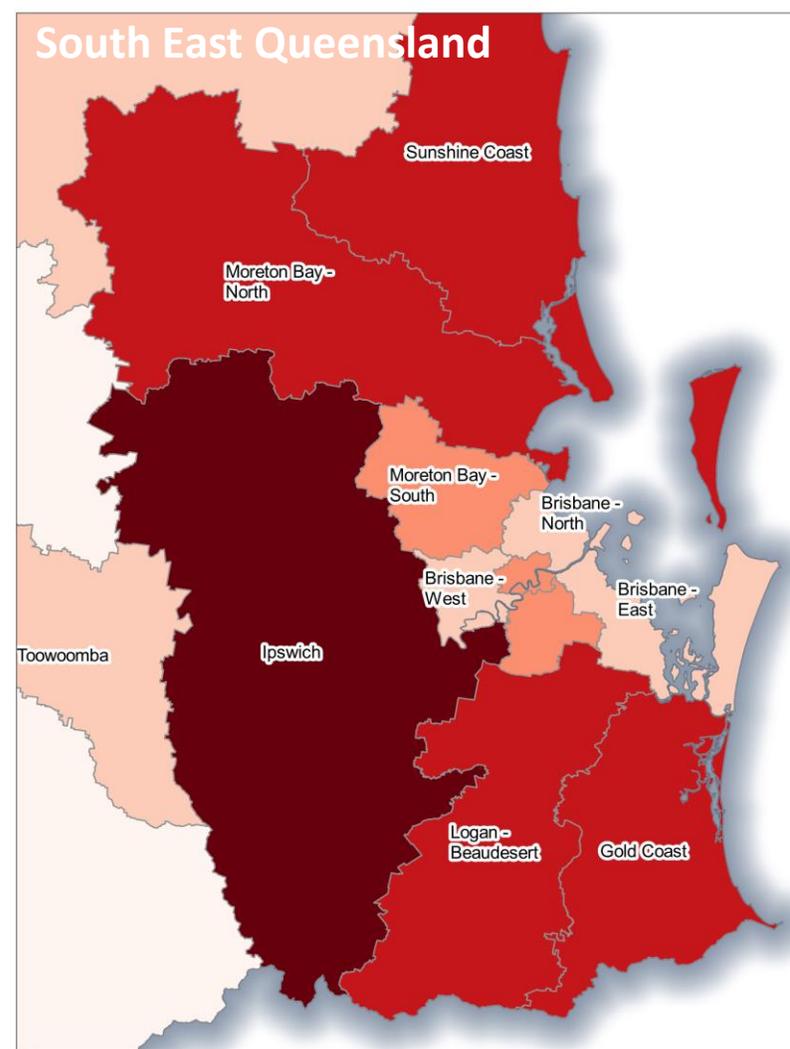
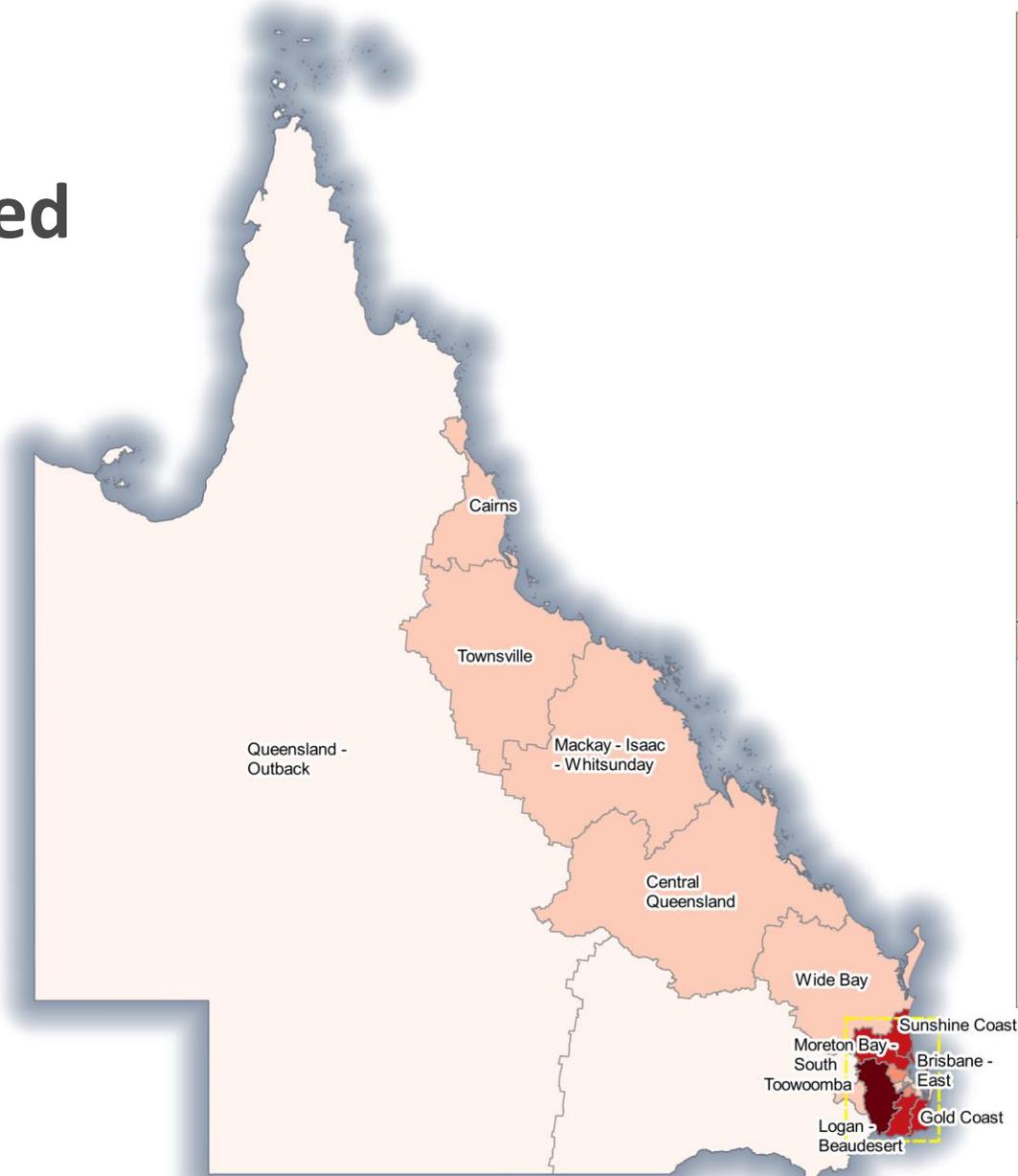
1. It's likely QLD will attract 30,000+ net migrants for the 21 FY.
2. Large outflows from Victoria benefiting other states.



Note: 2021* includes 3 quarters of data.

2021 to 2041 growth dominated by SEQ...

- ↳ Greatest population growth centred around SEQ
- ↳ Ipswich SA4 is expected to grow by over 200,000 persons, the Logan and Gold Coast SA4s also receiving significant growth in the next 20-year period. With favourable economic conditions, such as opportunities for renewable energy and the 2032 Olympics, these positively impact population growth in the region.



Change in population from 2021 to 2041 (persons)

- Decline of up to -400 persons
- Growth of up to 50,000
- Growth between 50,000 to 100,000
- Growth between 100,000 to 200,000
- Growth between 200,000 to 300,000

A range of forecast outcomes for various regions

SA4 Name	2016	2021	2031	2041	change (21 to 41)
Ipswich	333,702	377,075	501,307	637,755	260,679
Gold Coast	589,933	660,461	753,385	848,878	188,417
Logan - Beaudesert	328,707	360,884	447,297	533,616	172,732
Sunshine Coast	356,763	400,214	465,881	525,592	125,378
Moreton Bay - North	243,261	265,618	325,318	388,453	122,835
Brisbane Inner City	264,952	301,921	341,508	383,193	81,272
Moreton Bay - South	201,950	227,118	259,724	293,762	66,644
Brisbane - South	356,779	384,854	417,364	447,955	63,101
Townsville	234,310	239,074	261,470	283,453	44,379
Cairns	246,684	256,991	277,124	298,636	41,645
Brisbane - North	214,765	229,714	247,822	262,841	33,126
Brisbane - East	231,403	244,363	259,587	272,767	28,403
Toowoomba	152,862	160,402	174,635	188,504	28,102
Wide Bay	292,109	303,626	316,629	328,056	24,430
Central Queensland	225,548	228,383	237,353	243,514	15,132
Mackay - Isaac - Whitsunday	173,299	175,068	183,078	190,192	15,125
Brisbane - West	187,153	195,715	202,697	208,130	12,414
Queensland - Outback	82,571	82,240	82,284	81,901	-338
Darling Downs - Maranoa	128,401	128,281	128,390	127,915	-365

The role and function of place

Gold Coast



Broadbeach

Sunshine Coast



Noosa

Rest of QLD



Gladstone

Greater Brisbane



Brisbane CBD

Attracts high levels of overseas and interstate migrants.

Attracts retirees and established families from within Queensland.

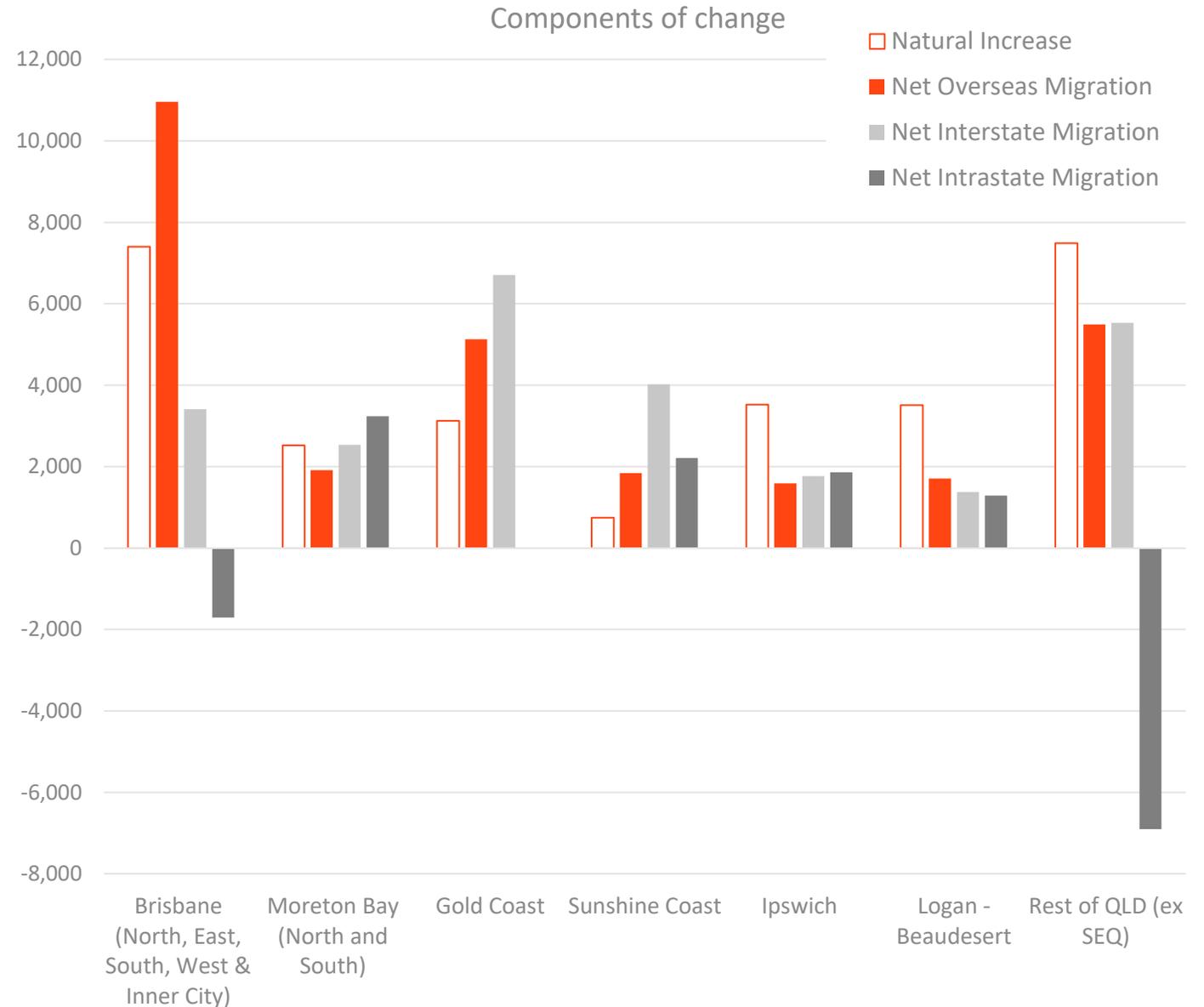
Loses its younger adults (20 to 30 year olds) to other states and Greater Brisbane.

Loses its younger adults (20 to 30 year olds) to other states, typically for education or employment reasons.



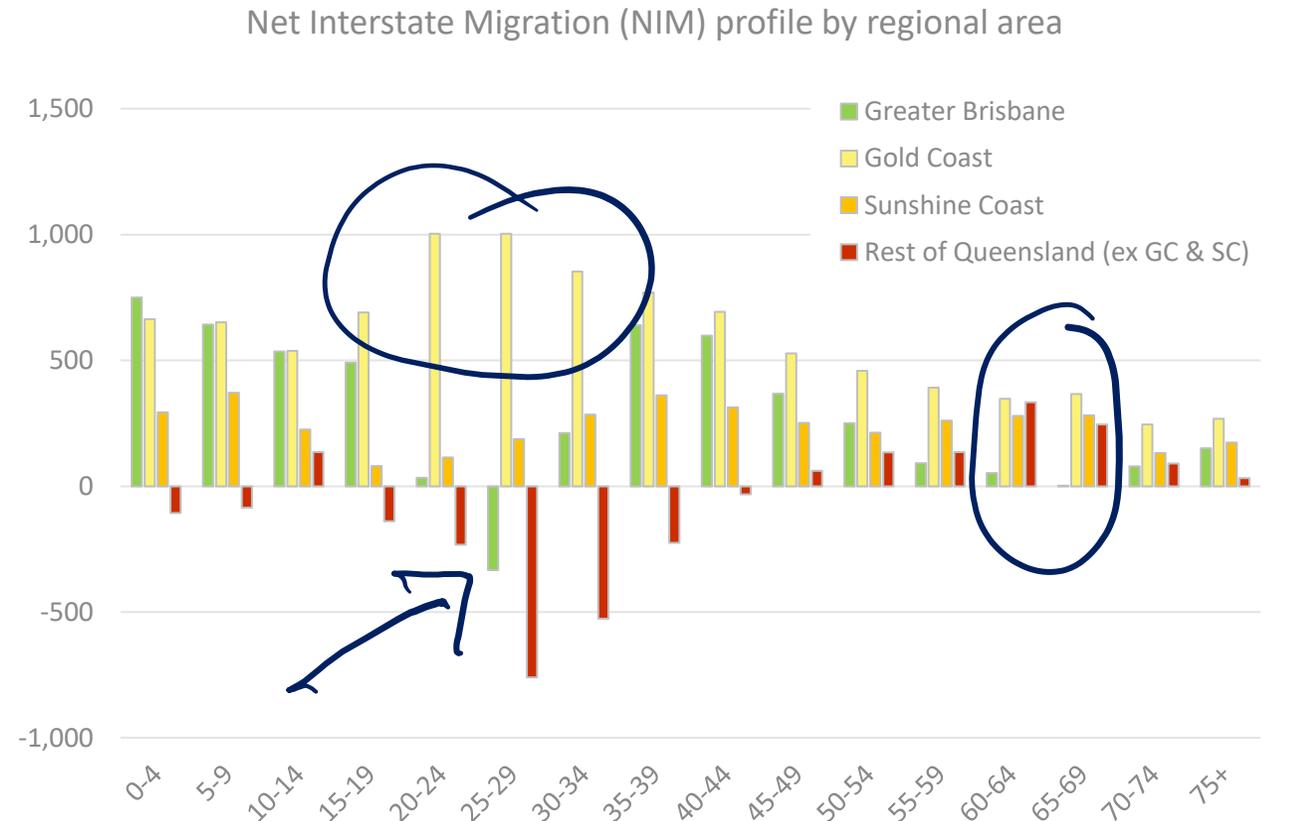
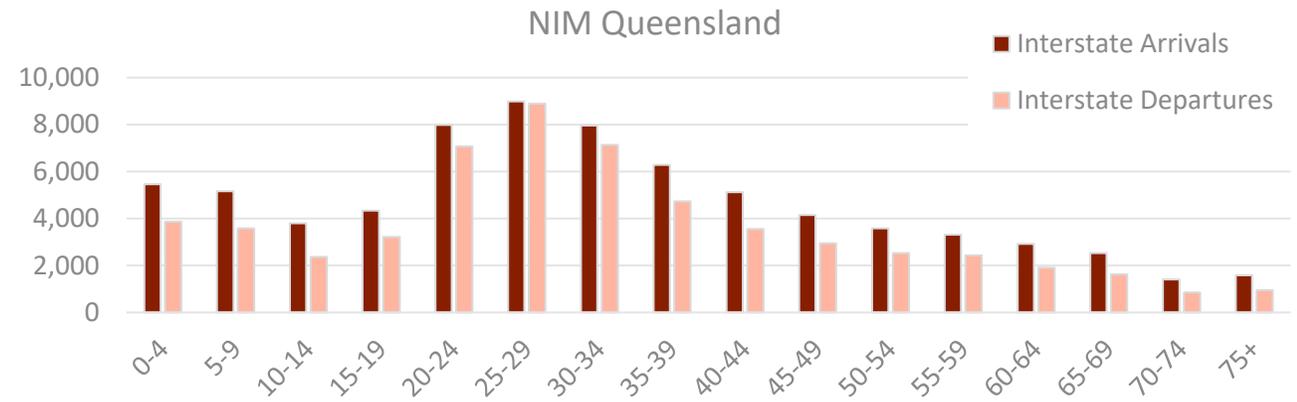
Drivers of growth across SEQ

- Overseas migration is the most significant driver of growth in established Brisbane.
- Both established Brisbane and Rest of Qld (outside of SEQ) lose population to other areas of the state.
- Gold and Sunshine Coasts heavily reliant on interstate migration, although Gold Coast does not attract population from the rest of Qld.
- Growth areas south of Brisbane (Ipswich, Logan) attract more overseas migration compared to areas north (Moreton Bay)



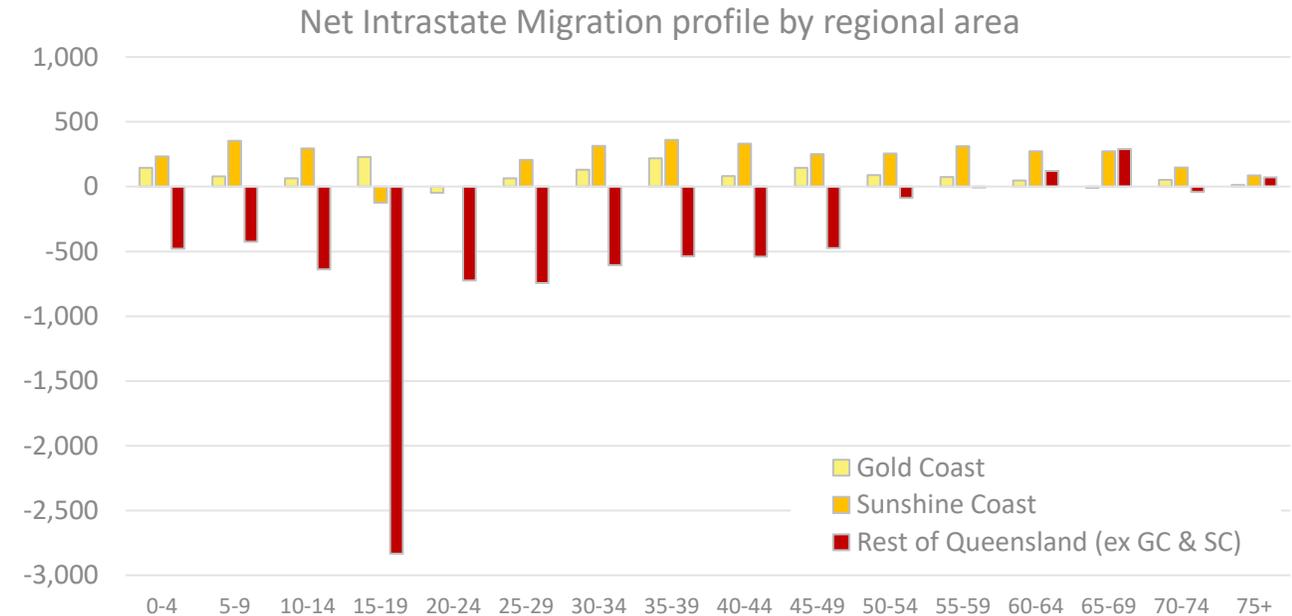
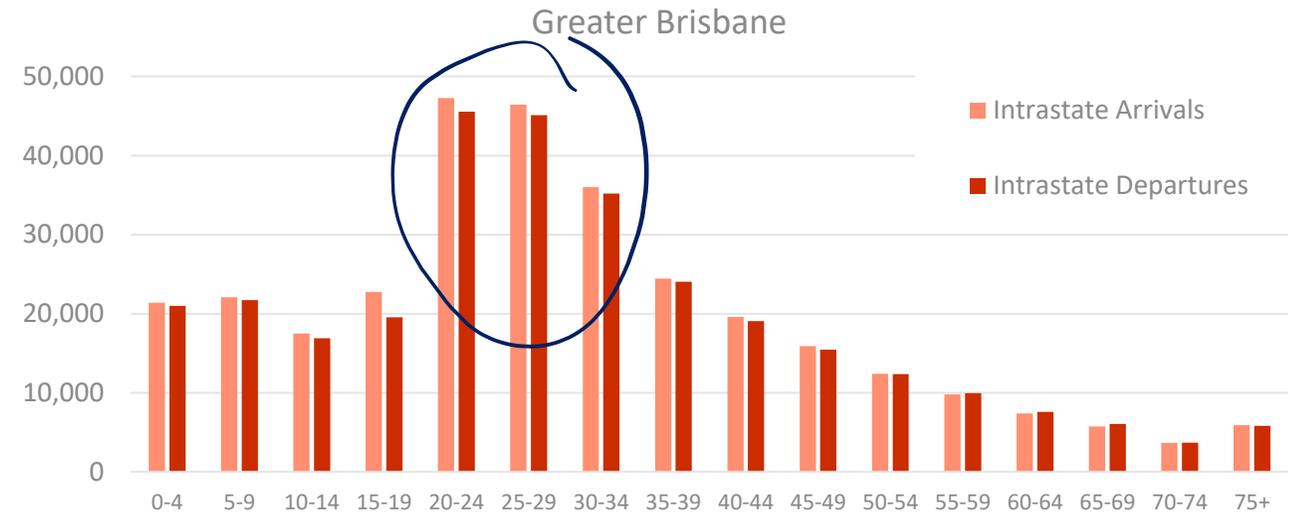
Migration by age structure tells us about the role and function regions play

- ▾ Queensland's NIM age profile consists of a typical young family profile of families moving from interstate.
- ▾ The Rest of Queensland and Greater Brisbane lose 20 to 30 year olds, often to places like Sydney and Melbourne for education or employment opportunities.
- ▾ The Gold Coast attracts high numbers young families and young adults from Interstate.
- ▾ Sunshine Coast gains mature families and their children as well as retirees. Given that the Sunshine Coast is half the size of Gold Coast, it is interesting that they are gaining almost just as many 60 to 65 year olds.
- ▾ Rest of Queensland is gaining retirees and losing its youth.



Sunshine Coast and Gold Coast play different roles

- Across Greater Brisbane, there is high movement in the young adult and mature family groups.
- The Sunshine Coast gains established families and their children, as well as retirees from across the State, with a much older population than anywhere else.
- For the Sunshine Coast, intrastate migration is a major driver, whilst Gold Coast is more dependent on interstate and overseas migration.
- Rest of Queensland loses its youth and has small gains in the retiree population.



Relationship between population growth and building approvals

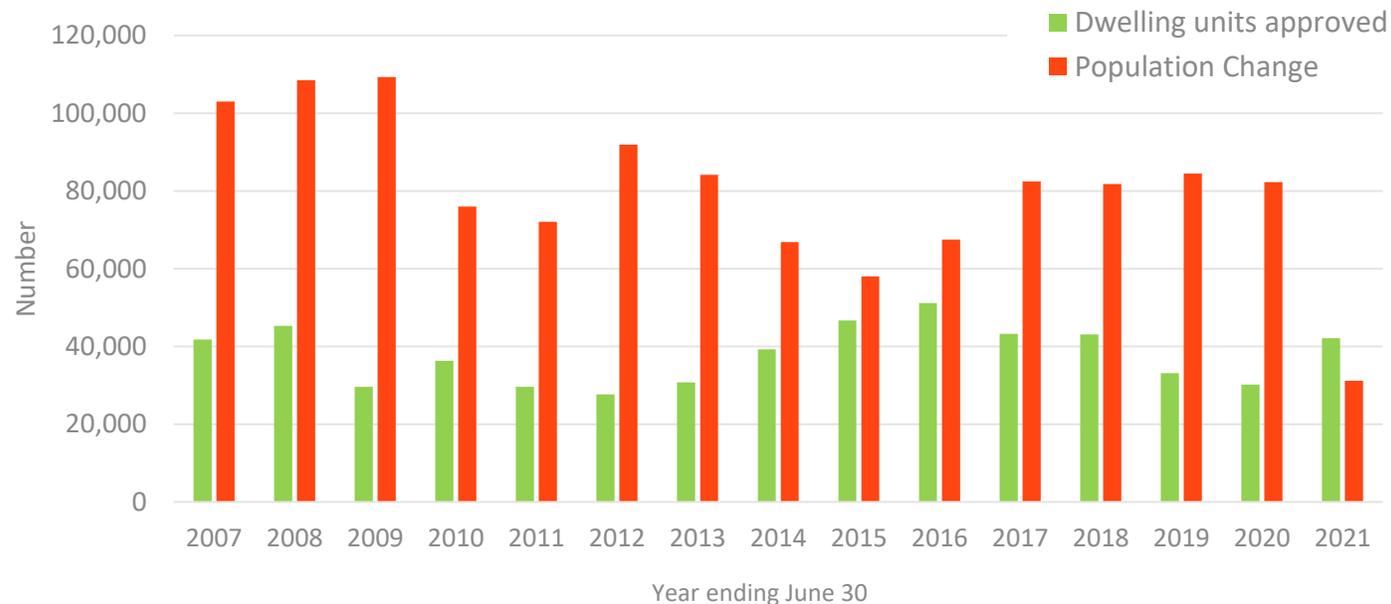
- ▣ The relationship between supply and demand is fundamental to population forecasting.
- ▣ Population change / growth, has provided indicators for the market to develop more housing.
- ▣ With closed borders, Australia has limited population growth, and the impacts on the housing industry are yet to be felt.
- ▣ This population and housing relationship in Queensland does not present challenges like those of NSW and VIC where building approvals have increased significantly despite stagnant population growth.

**Note 2021 data factors in 3 quarters of population data only.*

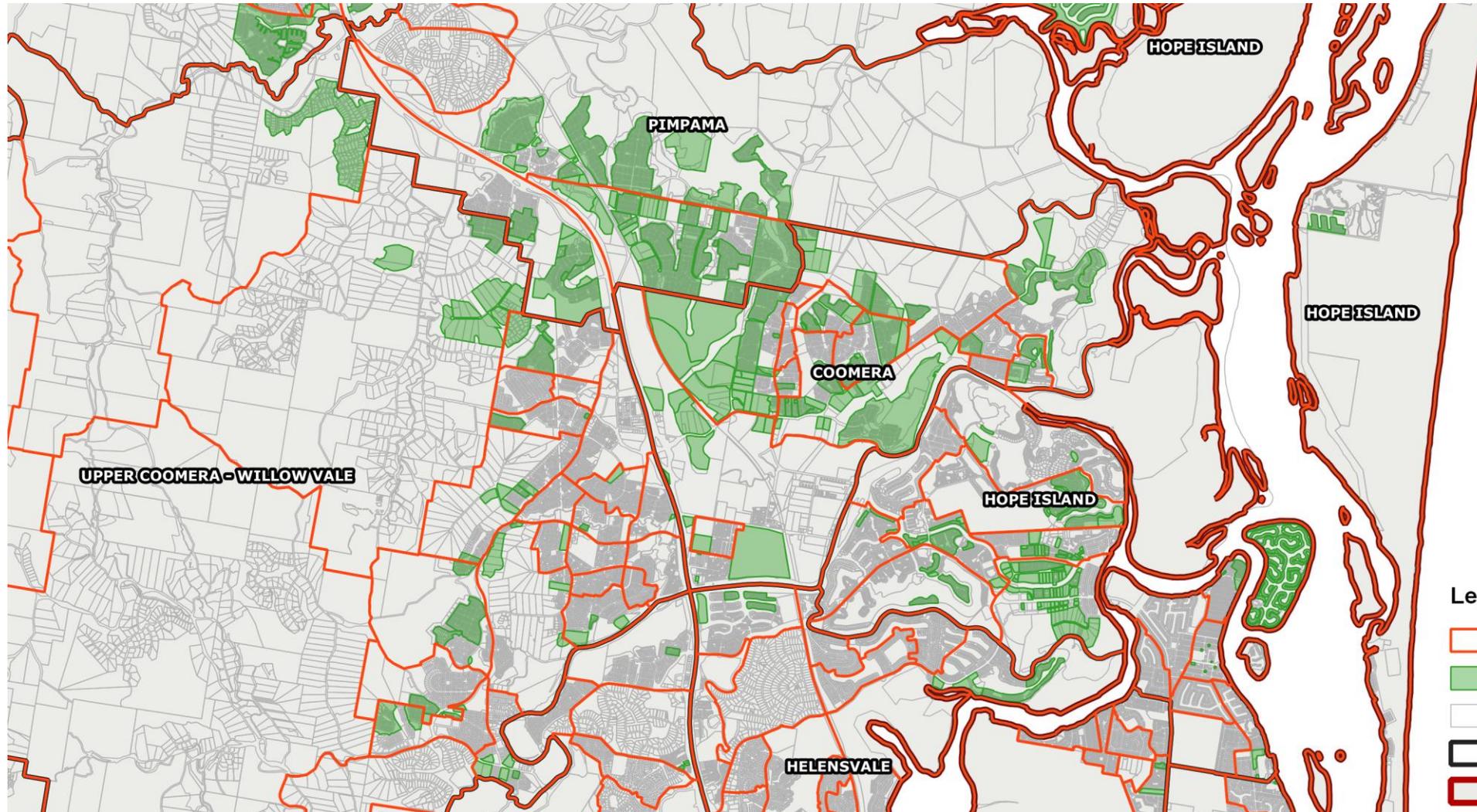
Population growth and building approvals, Australia, 2007 to 2021



Population growth and building approvals, Queensland, 2007 to 2021



Building our micro area forecasts



- Gold Coast SA4 has 48 SA2s within it.
- We have identified 1,100 Residential Development Sites within the Gold Coast SA4
- We will forecast approx. 500 micro area geographies within the SA4.

Legend

- Small area geography
- Residential Development Sites
- Land parcels
- SA2 boundary
- SA4 boundary

What forecasts are available

- [Queensland State Government - Population Forecasts](#)

- Pop by 5 year age groups
- SA2 for medium scenario
- LGA for low scenario (which is most aligned to our post-covid view)
- Produced in 2018, and reviewed in 2019 prior to the pandemic

- [Federal Government's Centre for Population](#)

- Greater Brisbane Capital City and Rest of State
- December 2020.

- **.id's Small Area Forecasts**

- Saw a need to deliver flexible and reliable forecasts to community builders.
- Flexible geography, flexible age structure, and provision of annual forecast data.
- Considers both the macro and micro view, as well as the impacts of covid
- Provides an independent view of population growth
- For QLD our forecasts are based on data from October 2021

Table 1 Projected population, ten largest LGAs^(a), Queensland, at 30 June

LGA	2016	2041 projection series		
	ERP	Low	Medium	High
	persons	— number —		
Brisbane (C)	1,184,215	1,479,841	1,551,149	1,635,343
Gold Coast (C)	576,918	831,416	943,686	1,076,192
Moreton Bay (R)	438,313	639,626	690,602	750,214
Ipswich (C)	200,123	482,691	557,649	644,677
Logan (C)	313,785	502,450	554,327	614,918
Sunshine Coast (R)	303,389	462,160	518,004	578,762
Townsville (C)	192,058	253,722	282,281	313,315
Cairns (R)	162,451	206,548	236,593	269,481
Toowoomba (R)	164,595	187,121	204,332	223,151
Redland (C)	151,987	184,292	192,431	201,988

(a) Ranked according to the medium series projected population in 2041.



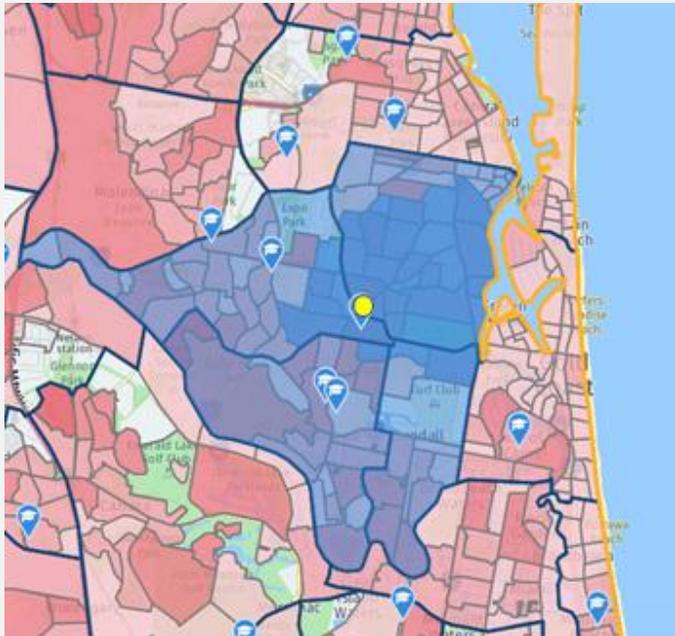
Australian Government
Centre for Population

Population Statement: Capital city and Rest-of-State Population Projections, 2019-20 to 2030-31

Why flexibility matters

Imagine planning for a new primary school

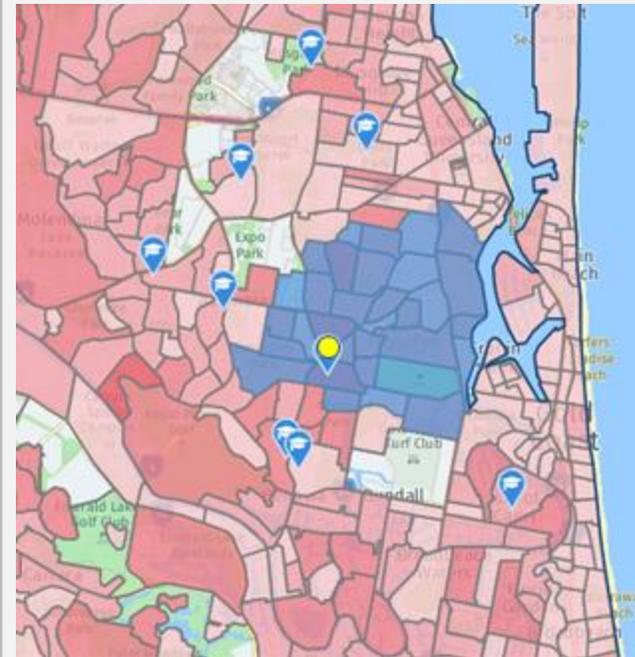
Using other forecasts



Using freely available forecasts that provide SA2 forecasts, by 5 year age structure.

The number of primary aged students in this catchment is 2,842 students.

Using Small Area Forecast information



Build a catchment based on our specific geography, incorporating logical boundaries such as major roads, or selecting a 5km radius from an address.

Choose your specific age requirement. In this example 5 to 11 year olds to accurately reflect primary aged children.

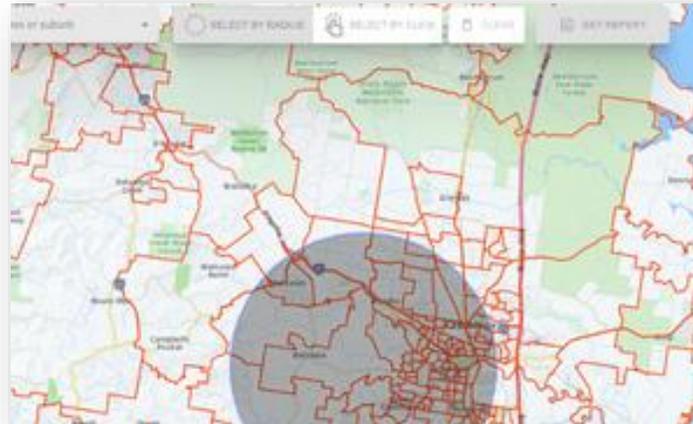
The number of primary aged students in this catchment is 1,018 primary aged students.

 SA2 boundaries
 .id SAFi boundaries

How to access our forecasts

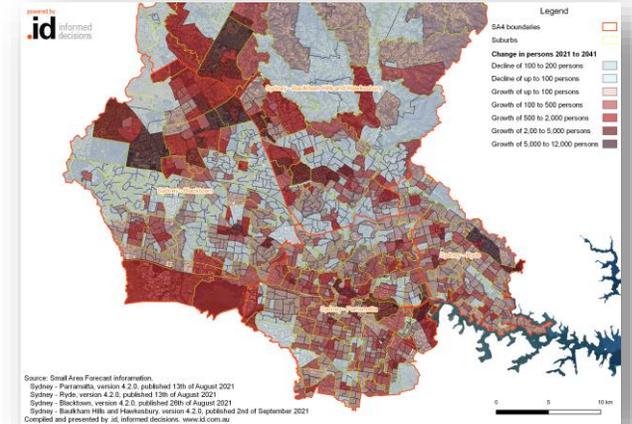


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