

Looking back to look forward:

Understanding population change in Glenorchy to help shape and plan for the community's future

Glenorchy City Community Workshop

8 July 2024

Dr Lisa Denny, Workforce Demographer

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Overview

Insights into the Glenorchy Community

Industry and work

Population change: past and present

The future: population projections

The periphery – what's happening and why it matters

Key messages



Community Profile

Insights into the Glenorchy Community
ABS Census of Population and Housing
2021 and 2016

Who are Glenorchians?

Estimated Resident Population (ERP) of 50,808 (2023)

Considerable change since 2016

Compared with Tasmanians

- similar sex ratio (slightly more females)
- younger (median age 37 v 42 years)
- less children, larger households
- higher proportion born overseas (26.6% v 20.9%)
- more religious
- slightly healthier - over half have no long term health condition (55.8% v 54.7%)
- More multicultural - higher proportion born overseas and with both or one parent born overseas

Compared with 2016

- younger (37 v 39)
- higher identification as indigenous (5.4% v 4.9%)
- more multi-cultural

	2021	Tasmania 2021	2016
Sex ratio – male/female	49.3/50.7	49.1/50.1	48.4/51.6
Median age	37	42	39
Average number of children for families with children	1.7	1.8	1.8
Ave people per household	2.4	2.4	2.3
ATSI	5.4	5.4	4.9
Ancestry - English/Australian	73.9	84.1	63.1
			Irish – 8.4 Scottish – 5.8
Country of birth - Australia	73.4	79.1	79.9
	Nepal - 4.3 India - 3.5		England – 2.3
Birth place of both parents - Overseas	25.9	18.3	15.6
Birth place of both parents - Australia	60.6	66.6	68.6
No religious affiliation	43.2	49.6	35.1

Households and families

HOUSEHOLDS

	2021 (%)	Tasmania 2021 (%)	2016 (%)
Family	64.3	67.6	62.8
Lone person (6,253 people)	31.5	29.0	33.7
Group	4.3	3.4	3.6

FAMILIES

	2021 (%)	Tasmania 2021 (%)	2016 (%)
Couple family without children	38.1	44.5	36.4
Couple family with children	36.8	36.8	37.1
One parent family	22.9	17.3	24.3
- female	78.2	78.8	81.8

Housing

TYPE

	2021 (%)	Tasmania 2021 (%)	2016 (%)
Separate house	81.5	87.7	81.3
Townhouse	5.4	6.1	6.3
Apartments	12.5	5.3	11.8
Average number of bedrooms	2.8	3	2.8
Average people per dwelling	2.4	2.4	2.3
Average number of motor vehicles	1.7	1.9	1.6

TENURE

	2021 (%)	Tasmania 2021 (%)	2016 (%)
Owned outright	28.8	37.1	29.3
Owned with mortgage	32.1	33.0	33.3
Rented	36.0	26.4	33.9
Rent >30% of household income	34.0	34.2	13.9
Mortgage repayment >30% of household income	11.5	10.1	5.3

	2021 (%)	Tasmania 2021 (%)	2016 (%)
Bachelor degree or higher	21.8	21.9	10.4
Certificate III or IV	18.2	18.5	19.2
Year 12	13.4	12.0	13.5
Year 10	15.2	15.9	18.7

Education – attainment

Highest level of educational attainment achieved

- All those aged 15 or older
- Includes those enrolled in education

Education - enrolment

	2021 (%)	Tasmania 2021 (%)	2016 (%)
Pre-school	3.9	4.2	2.4
Primary school	27.7	29.3	29.5
Secondary school	19.1	20.9	19.7
Vocational Education and Training	14.2	9.6	8.9
University	12.7	12.8	9.8



Work

Industry, occupation and employment

Work – paid and unpaid

	2021 (%)	Tasmania 2021 (%)	2016 (%)
In labour force	60.6	58.2	62.1
Full-time	51.1	51.6	53.3
Unpaid care for children	25.5	25.6	27.3
Provided care assistance - unpaid	12.2	12.9	12.0
Voluntary work	14.2	18.0	15.4

		2021 (%)	Tasmania 2021 (%)
Couple families	1 full time, 1 part time	22.9	22.8
	neither working	21.1	24.6
	Both full time	19.0	17.9
One parent family	full time	27.4	23.1
	part time	23.7	24.6
	not working	39.4	42.8
Lone person	full time	24.7	23.7
	part time	12.2	13.4
	not working	54.7	55.2

Place of Work V Place of Usual Residence

USUAL RESIDENCE - GLENORCHY

	LGA of Work	Number	%
1	Hobart	9,271	39.2
2	Glenorchy	8,557	36.1
3	Clarence	2,448	10.3
4	No Fixed Address (Tas.)	1,003	4.2
5	Brighton	707	3.0

PLACE OF WORK - GLENORCHY

	LGA of usual residence	Number	%
1	Glenorchy	8,557	38.9
2	Clarence	3,712	16.9
3	Hobart	2,804	12.7
4	Brighton	2,285	10.4
5	Kingborough	1,400	6.4
6	Derwent Valley	1,042	4.7
7	Sorell	841	3.8
8	Southern Midlands	510	2.3
9	Huon Valley	329	1.5
10	Launceston	115	0.5

Glenorchy Residents

Top 15 Industry sub-sector of work

ABS Census of Population and Housing 2021

Place of Usual Residence – Glenorchy LGA

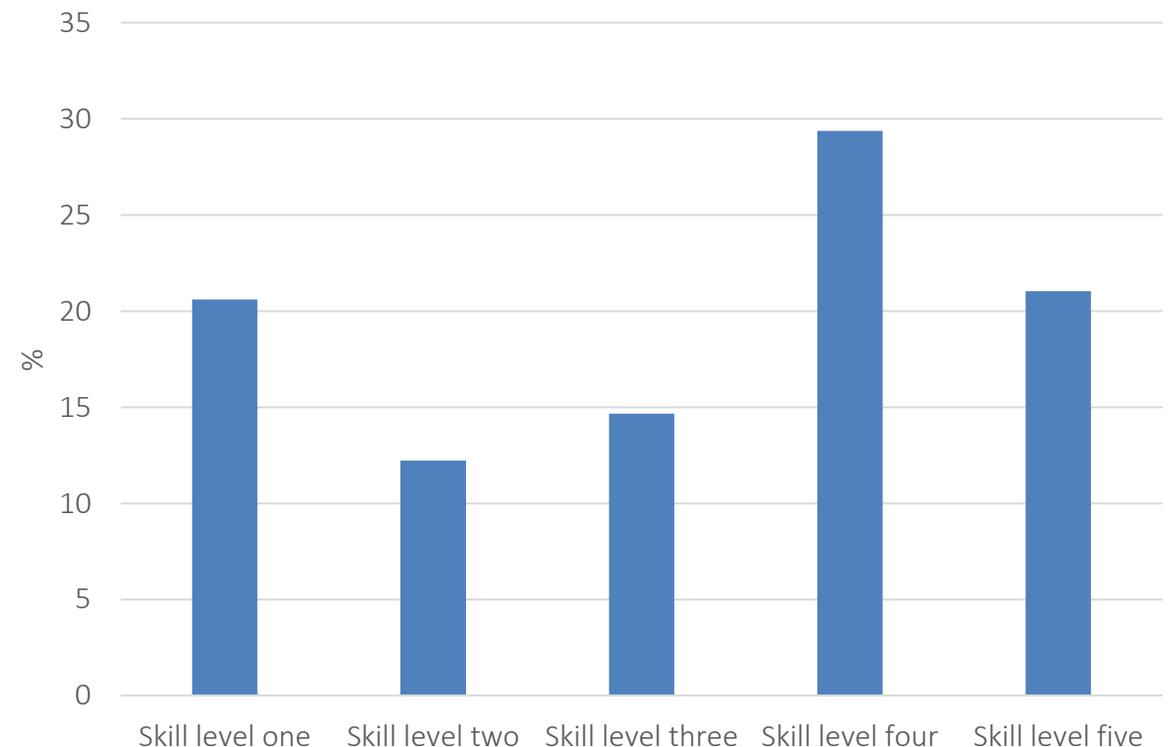
ANZSIC Industry 2-digit level

23,675 people

	Industry sub-sector	Number	%
1	Food and Beverage Services	1,683	7.1
2	Public Administration	1,458	6.2
3	Social Assistance Services	1,348	5.7
4	Preschool and School Education	1,237	5.2
5	Construction Services	1,233	5.2
6	Other Store-Based Retailing	1,140	4.8
7	Food Retailing	1,093	4.6
8	Residential Care Services	1,046	4.4
9	Hospitals	966	4.1
10	Medical and Other Health Care Services	819	3.5
11	Professional, Scientific and Technical Services (except Computer System Design and Related Services)	790	3.3
12	Personal and Other Services	640	2.7
13	Food Product Manufacturing	581	2.5
14	Road Transport	575	2.4
15	Public Order, Safety and Regulatory Services	517	2.2

Top 15 Occupations – place of residence

	Occupation	No.	%
1	Carers and Aides	2,210	9.3
2	Sales Assistants and Salespersons	1,702	7.2
3	Cleaners and Laundry Workers	1,070	4.5
4	Specialist Managers	957	4.0
5	Business, Human Resource and Marketing Professionals	878	3.7
6	Road and Rail Drivers	863	3.6
7	Health Professionals	861	3.6
8	Hospitality, Retail and Service Managers	854	3.6
9	Construction Trades Workers	818	3.5
10	Food Trades Workers	696	2.9
11	Inquiry Clerks and Receptionists	692	2.9
12	Education Professionals	665	2.8
13	General Clerical Workers	622	2.6
14	Hospitality Workers	590	2.5
15	Automotive and Engineering Trades Workers	542	2.3



Skill Level 1 is commensurate with a Bachelor degree or higher qualification
 Skill Level 2 is commensurate with an Advanced Diploma or Diploma
 Skill Level 3 is commensurate with a Certificate IV or III (including at least 2 years on-the-job training)
 Skill Level 4 is commensurate with a Certificate II or III
 Skill Level 5 is commensurate with a Certificate I or secondary education

	Industry sub-sector	No.	%
1	Social Assistance Services	1,626	7.4
2	Construction Services	1,375	6.2
3	Preschool and School Education	1,292	5.9
4	Other Store-Based Retailing	1,154	5.2
5	Food and Beverage Services	1,097	5.0
6	Road Transport	861	3.9
7	Food Product Manufacturing	815	3.7
8	Residential Care Services	813	3.7
9	Food Retailing	782	3.6
10	Medical and Other Health Care Services	748	3.4
11	Public Administration	657	3.0
12	Transport Equipment Manufacturing	570	2.6
13	Primary Metal and Metal Product Manufacturing	554	2.5
14	Professional, Scientific and Technical Services (except Computer System Design and Related Services)	507	2.3
15	Repair and Maintenance	487	2.2

Glenorchy Industry

ABS Census of Population and Housing 2021

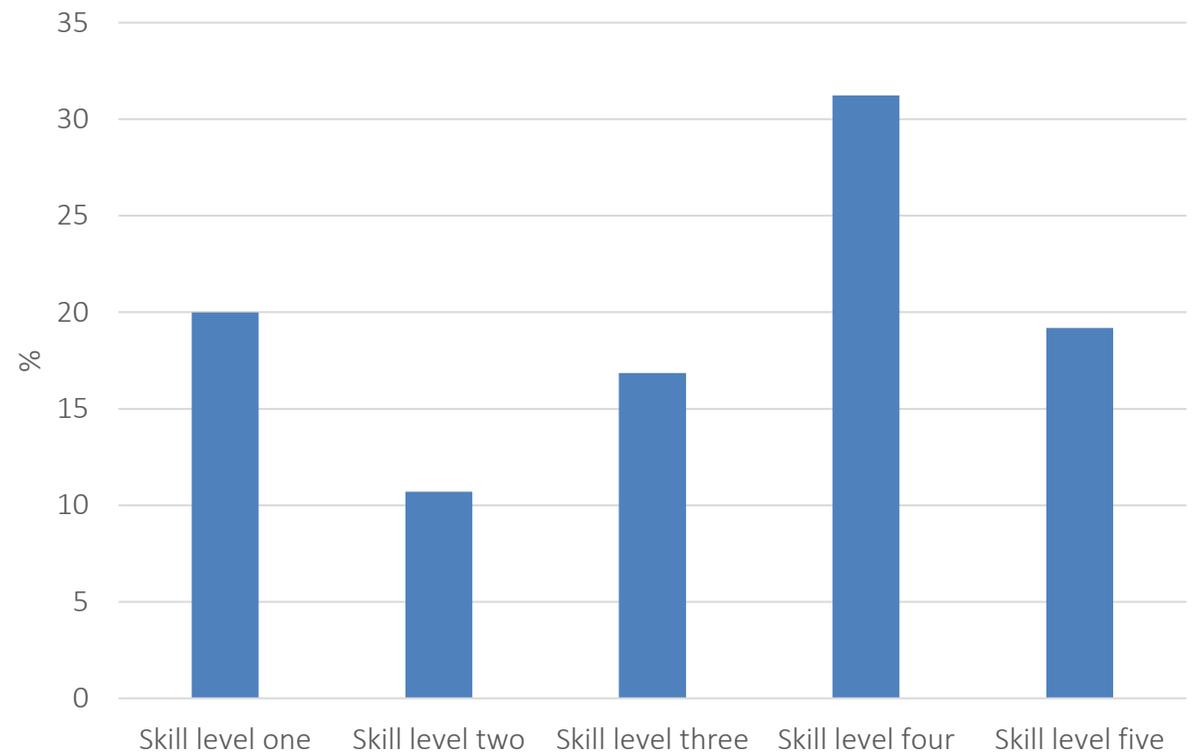
Place of Work – Glenorchy LGA

ANZSIC Industry 2-digit level

22,002 people

Top 15 Occupations - Place of Work

	Occupation	Number	%
1	Carers and Aides	2,051	9.3
2	Sales Assistants and Salespersons	1,595	7.2
3	Specialist Managers	1,274	5.8
4	Road and Rail Drivers	1,094	5.0
5	Automotive and Engineering Trades Workers	949	4.3
6	Hospitality, Retail and Service Managers	852	3.9
7	Construction Trades Workers	745	3.4
8	Education Professionals	734	3.3
9	Business, Human Resource and Marketing Professionals	635	2.9
10	Cleaners and Laundry Workers	625	2.8
11	Factory Process Workers	594	2.7
12	Electrotechnology and Telecommunications Trades Workers	480	2.2
13	Machine and Stationary Plant Operators	478	2.2
14	Other Clerical and Administrative Workers	463	2.1
15	General Clerical Workers	455	2.1



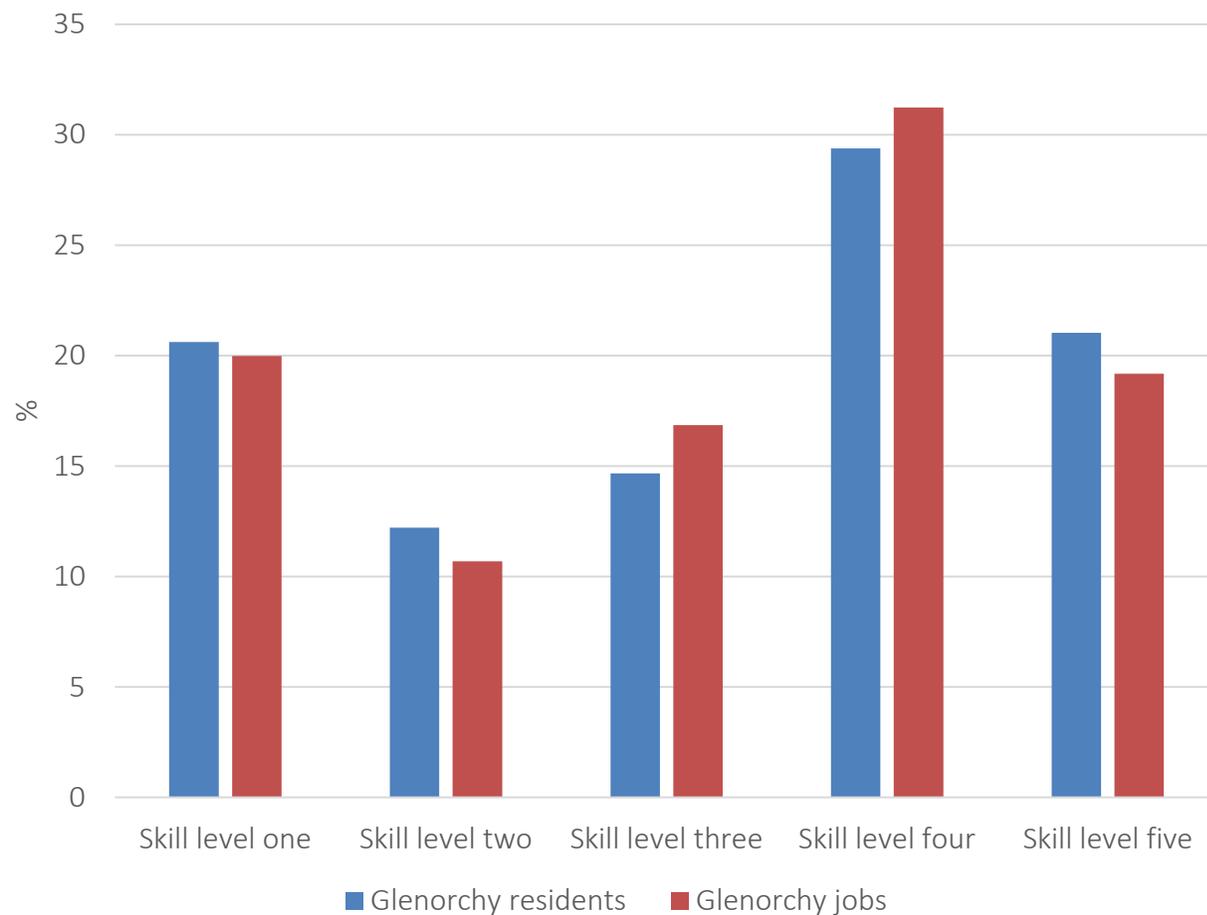
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Skill level

- Glenorchy residents have slightly higher skilled jobs than the jobs available in the Glenorchy LGA
- Around half the jobs require no more than a Certificate II qualification (50.4% for both)
- A higher proportion of Glenorchy jobs require a trade qualification or certificate II
- Residents are likely to be in lowest skilled jobs - polarisation

Skill Level 1 is commensurate with a Bachelor degree or higher qualification

Skill Level 2 is commensurate with an Advanced Diploma or Diploma

Skill Level 3 is commensurate with a Certificate IV or III (including at least 2 years on-the-job training)

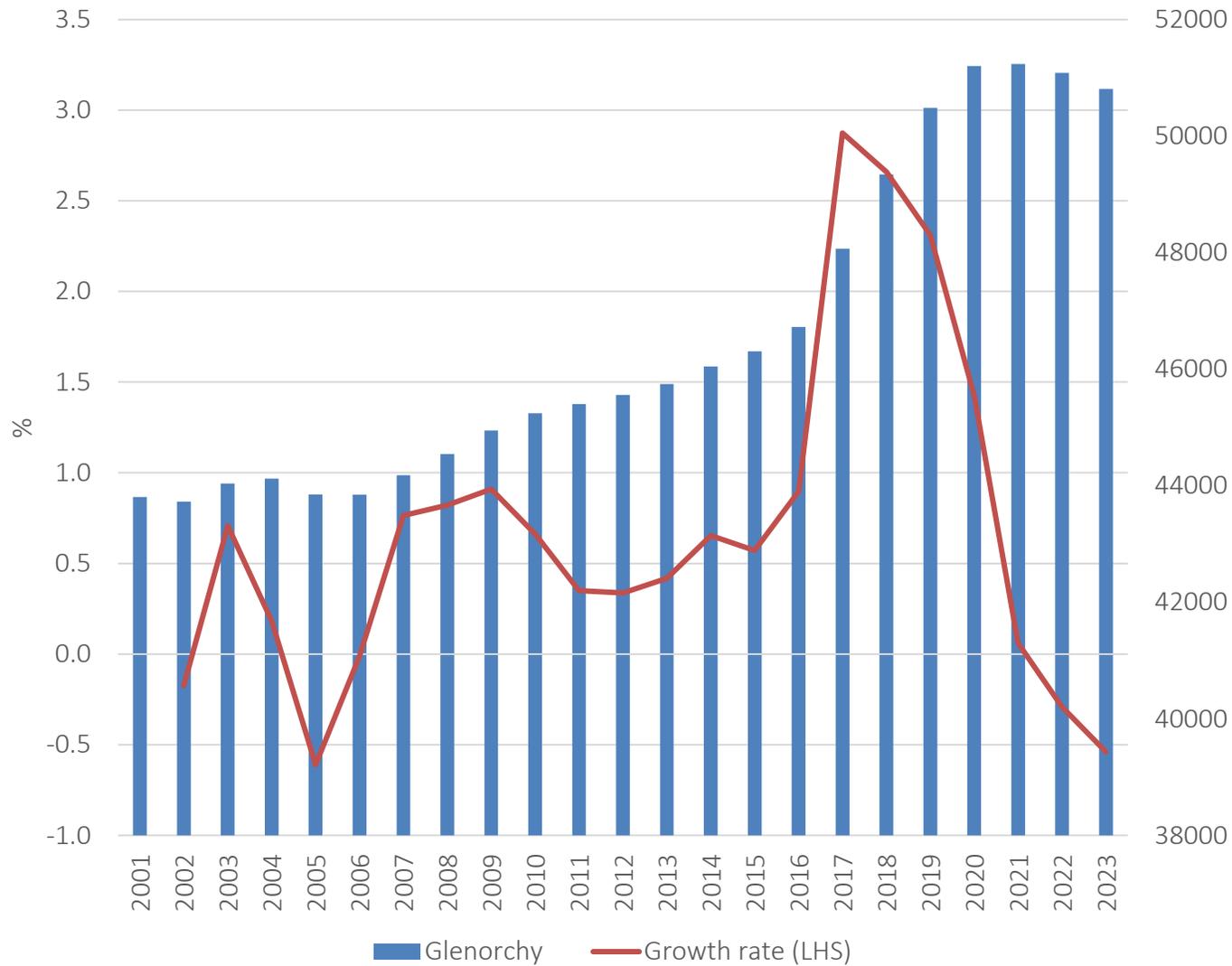
Skill Level 4 is commensurate with a Certificate II or III

Skill Level 5 is commensurate with a Certificate I or secondary education

Population change: past and present

Glenorchy Overview





Population size and growth rate

Not a linear process

Strong growth between 2016 and 2020 - peak at 51,159 in 2021

Has been in decline since 2021



Population change

A function of:

- population age structure
- migration

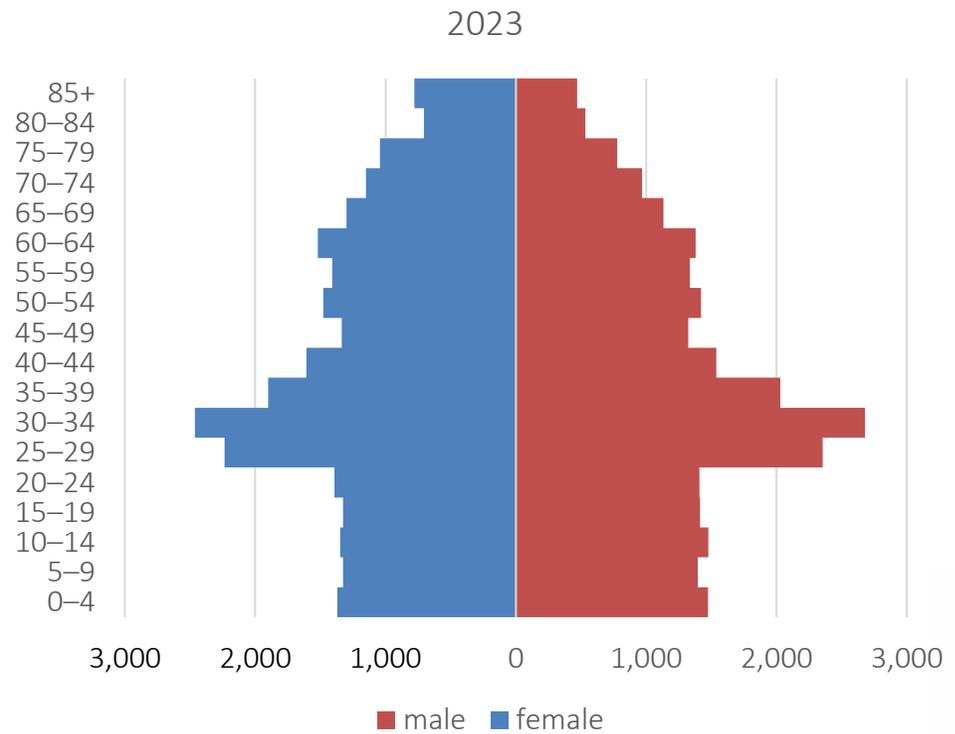
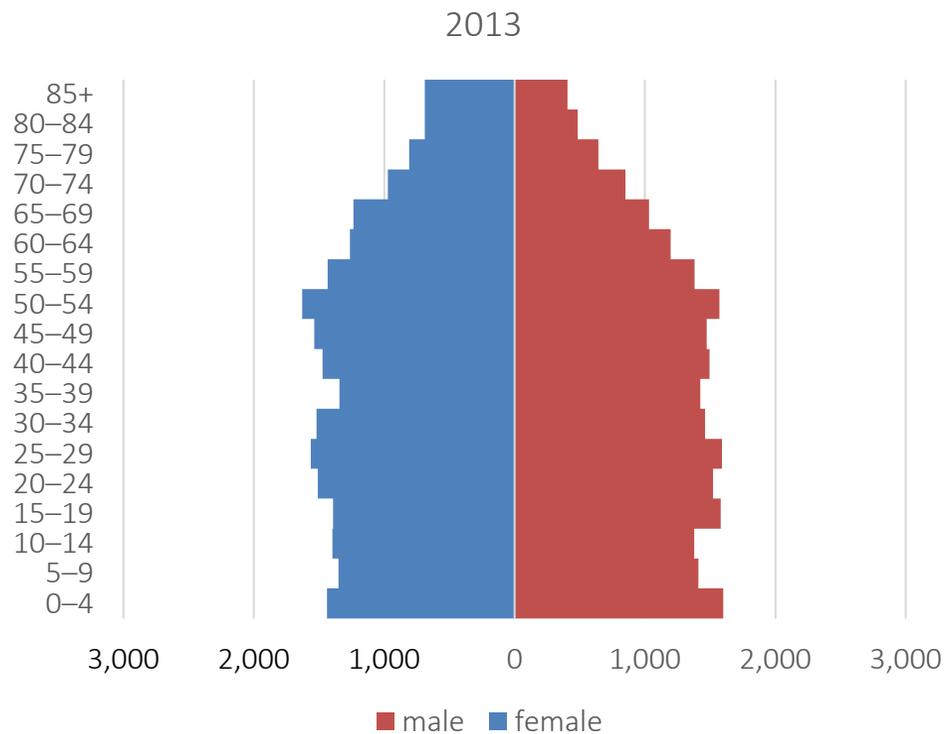
Driven by individual decisions:

- Whether or not to have a child, when and how many to have
- Where to live

Personal circumstances and stage of life which influence these decisions are impacted by a range of internal and external factors

- *employment, family – parents or partner, housing, children, education, health, lifestyle aspirations, visa status*
- *Can be further influenced or impacted by policy positions of the day*
- *Influenced by what is happening on the periphery*

Population age structure – 2013 and 2023



How did we get here?

Three periods:

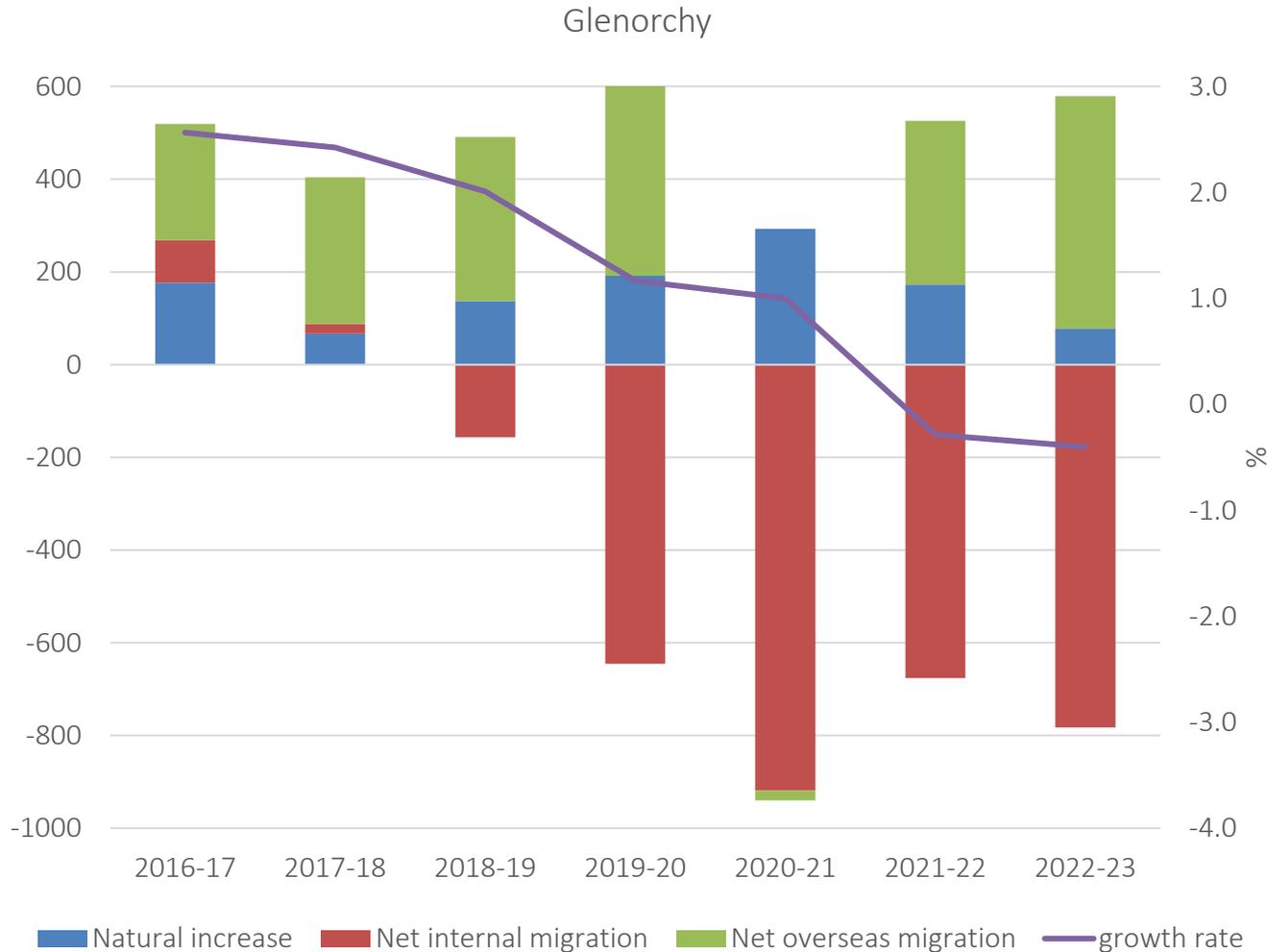
- 1) Pre-pandemic: 2016 to 2019
- 2) Pandemic era: 2020 and 2021
- 3) Post-pandemic – new normal?

- The Tasmanian Population Growth Strategy and associated marketing efforts
- International education - priority “super-growth” export services sector at a national and state level
- Increased use of overseas migration to fill skill and labour shortages – temporary, seasonal and permanent
- Change in temporary migrant visa system and pathways to permanency e.g. graduate pathway
- Factors that affect decision-making: relative housing, employment and lifestyle as well as family connections
- The impact of the COVID-19 global pandemic on population movements due to the closure of the national, and some state and territory, borders
 - The associated disruption to economic and social trends e.g. working from home, lifestyle values, the great resignation, mass vaccination etc
- Post-pandemic: changes to overseas migration policy, international education, relative economic performance, housing, access to services, relative employment opportunities

3 July 2024

‘Refreshed’ Tasmanian population policy

Components of population change



Natural Change

- Difference between births and deaths

Net Internal Migration

- Difference between arrivals to and departures from Glenorchy to other areas in Australia

Net Overseas Migration

- Difference between direct arrivals to and direct departures from overseas to Glenorchy
- Permanent, temporary – skilled, students, graduate, WHM - humanitarian, visitors, Kiwis, Australians

	Place of origin	No.	%
1	Overseas	3,007	23.2
2	Hobart	2,140	16.5
3	Clarence	1,026	7.9
4	Brighton	770	5.9
5	Kingborough	411	3.2
6	Derwent Valley	313	2.4
7	Brisbane	286	2.2
8	Sorell	224	1.7
9	Cumberland	202	1.6
10	Canterbury-Bankstown	173	1.3

New Glenorchy residents

Nearly a quarter of new residents lived overseas 5 years prior to the Census

Top 2 to 6 place of origin LGAs were in Tasmania – 36%

Residents also came from Brisbane and LGAs in south and west Sydney (4.2%)

Source: ABS Census of Population and Housing, 2021

Former Glenorchy residents

31,544 Glenorchy residents lived in
Glenorchy 5 years prior (retention)

9,361 lived elsewhere in Australia

The top 9 of the top 10 LGA
destinations were in Tasmania –two
thirds of all movers

Likely that many former residents
returned to their country of origin
during the COVID-19 pandemic
period and were not in Australia at
the time of the Census

Source: ABS Census of Population and Housing,
2021

	Local Government Area	No.	%
1	Brighton	1,603	17.1
2	Clarence	1,427	15.2
3	Hobart	1,184	12.6
4	Derwent Valley	574	6.1
5	Kingborough	462	4.9
6	Sorell	434	4.6
7	Southern Midlands	215	2.3
8	Gold Coast	175	1.9
9	Launceston	161	1.7
10	Huon Valley	153	1.6

The future

Population projections for Glenorchy: 2023 to 2053

About population projections

Projections are not forecasts

They are an assessment of what would happen to a population if assumed levels of the components of population change (births, deaths and migration), based on recent history, were to occur throughout the projection period.

Traditional population projections do not take into consideration the impact of future unknown policy changes, land use, marketing efforts or otherwise – these would be more akin to what if scenario planning or forecasting

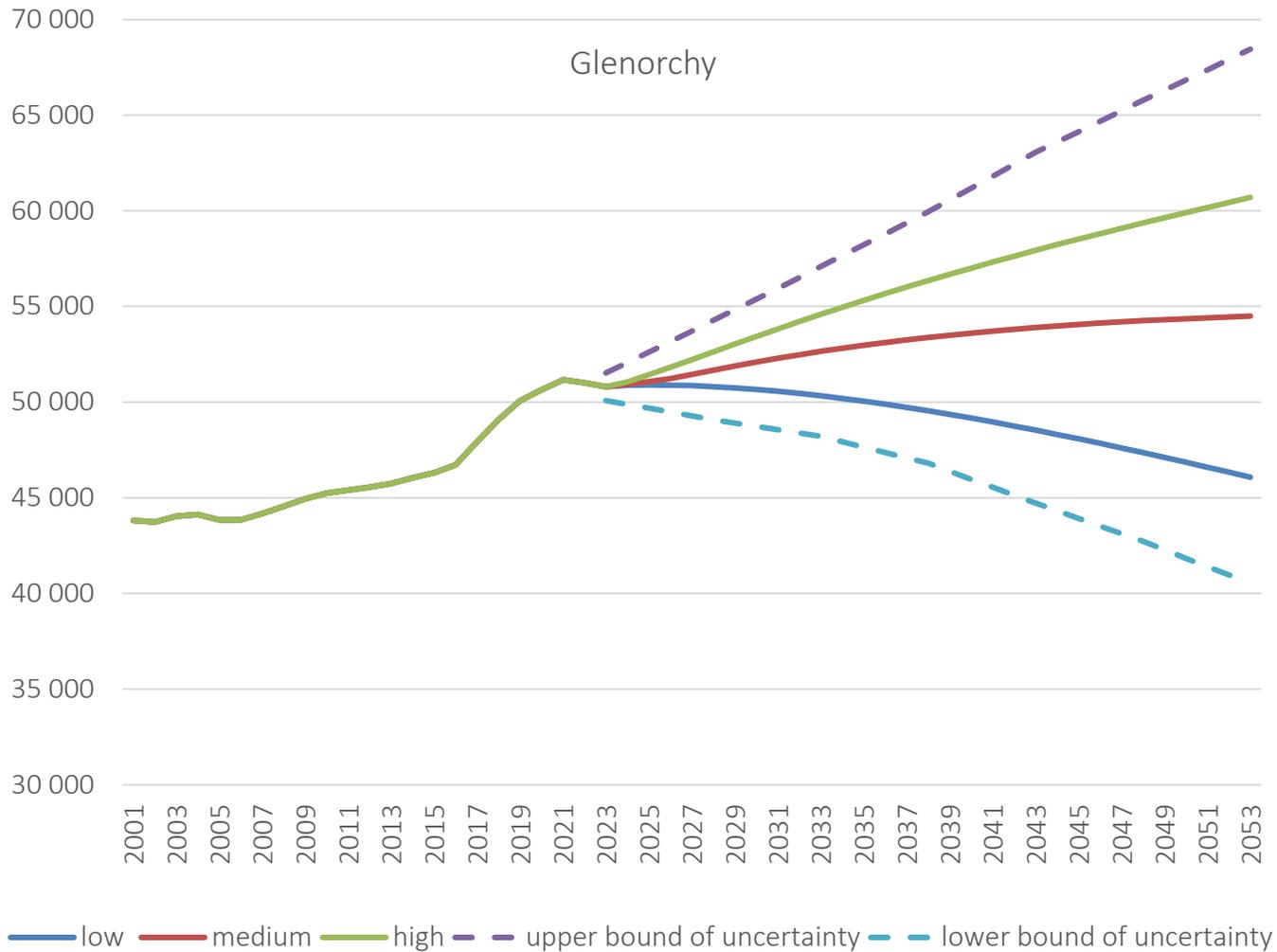
Valid life of population projections

In the past, the valid, acceptable life of a population projection series has been a generation (around 20 years).

This is because the variables influencing demographic change were predominantly birth rates and life expectancy. Migration played a much smaller role in demographic change until the 2000s.

Now that migration is the dominant component of population change and that the composition of migration has many variables; inward and outward movements within and between LGAs, states and territories as well as overseas, by age and sex.

For these reasons, the valid, acceptable life of population projections should be reduced to 15 years, maximum.



Population projections

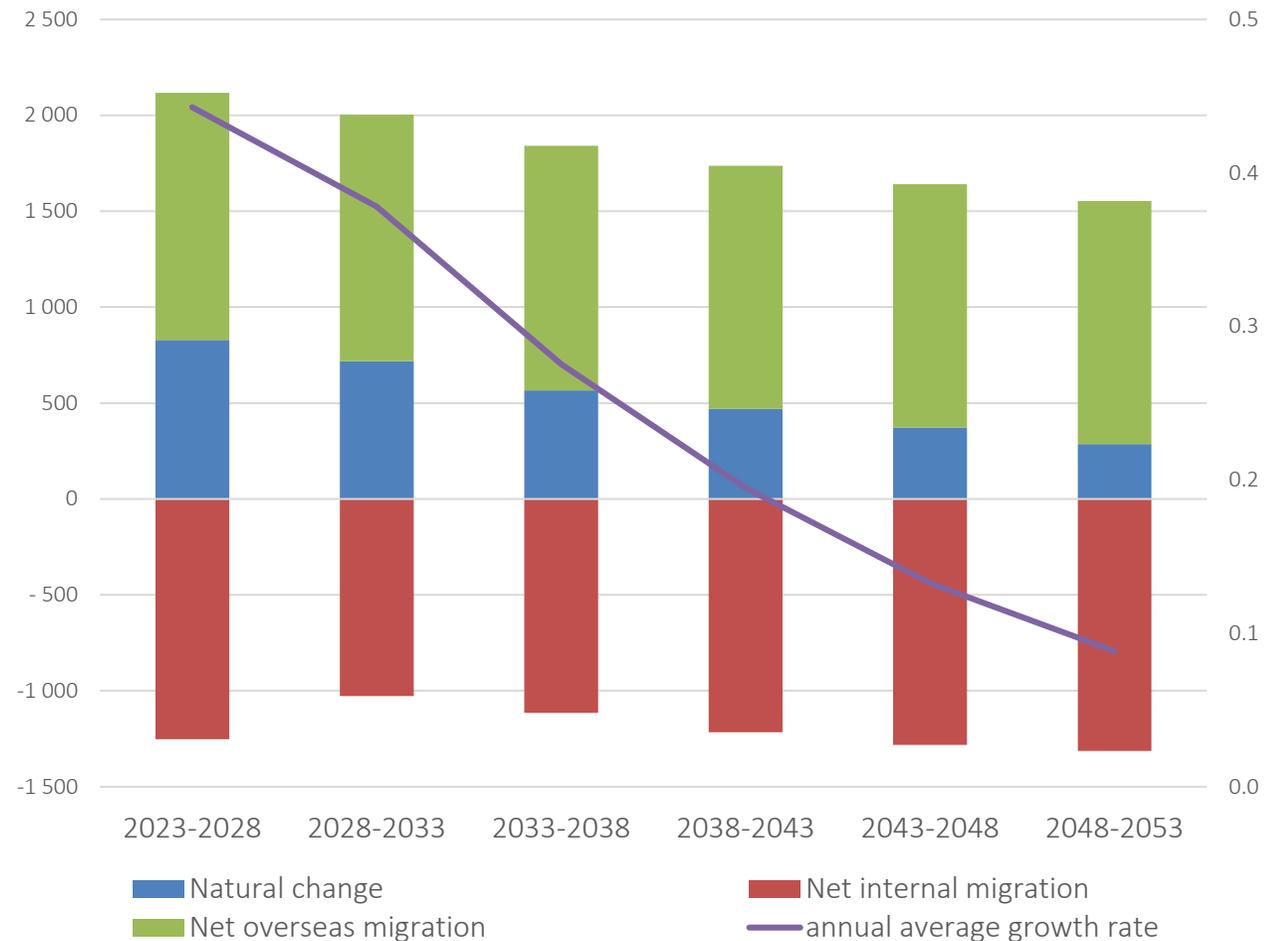
Projected to increase by 3,682 persons by 2053 – a rate of 7.2% over the 30-year projection period

The uncertainty range covers approximately 80% of possible futures and is estimated from past forecast errors.

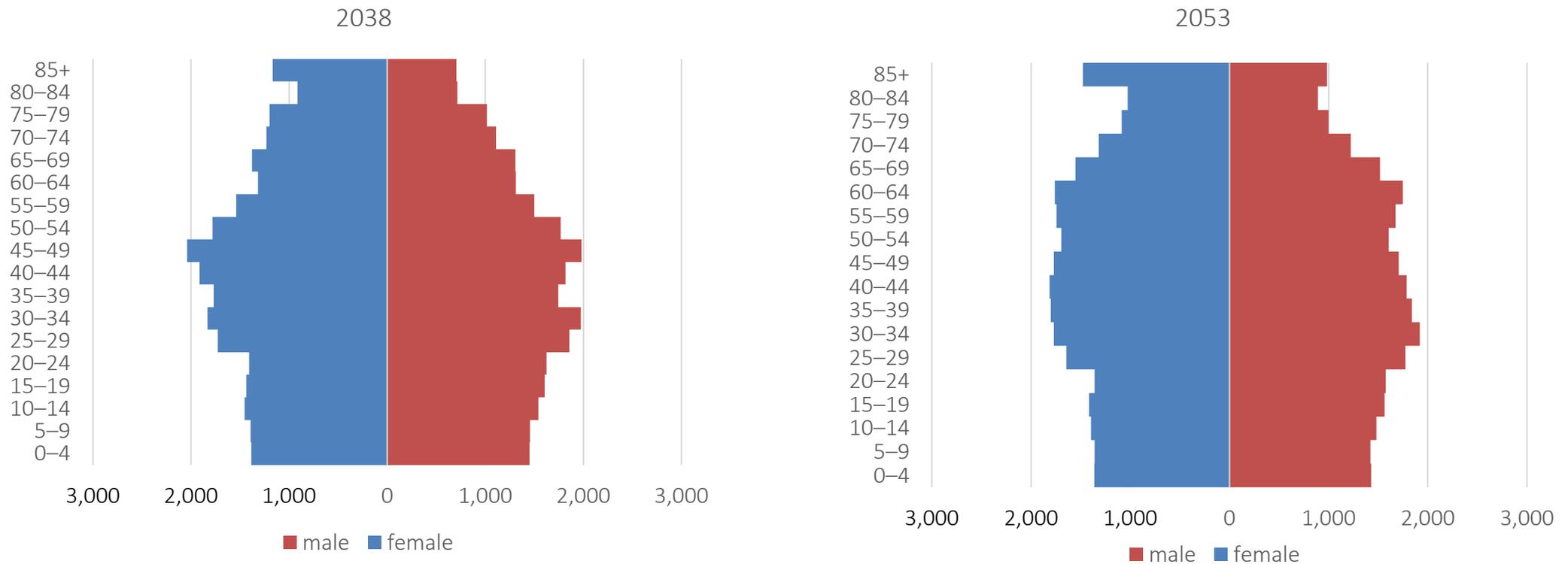
Projected Components of Population Change

Overseas migration will offset internal migration losses – just

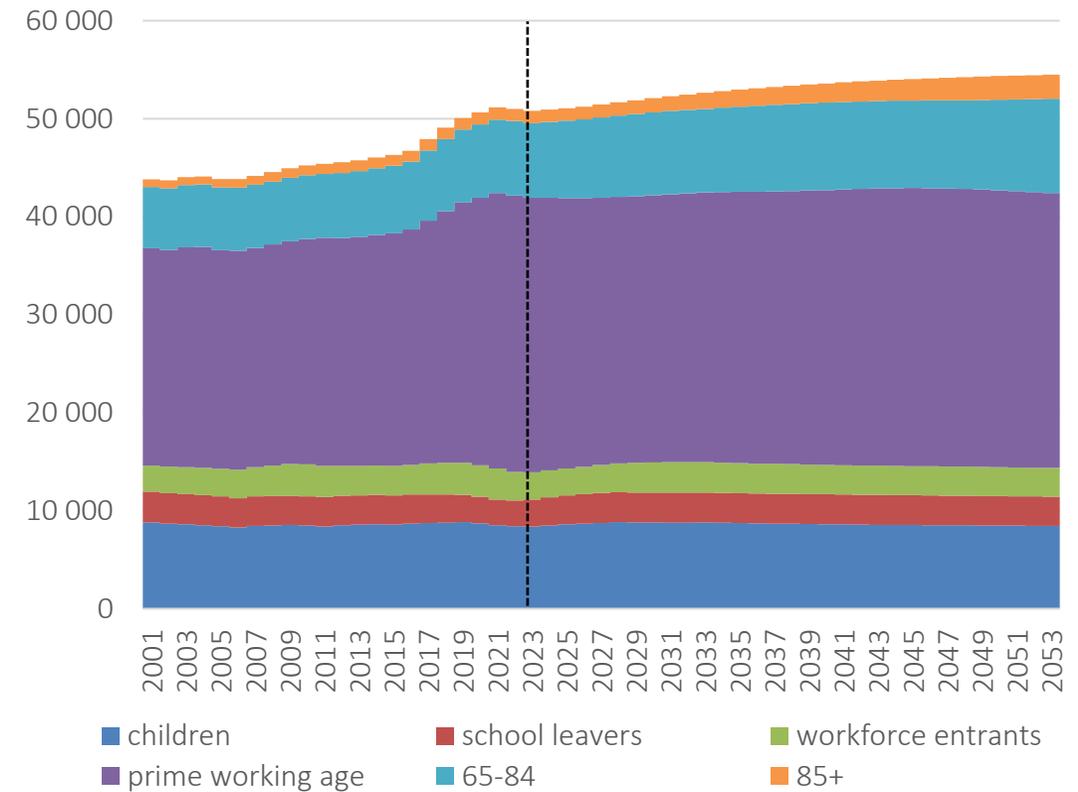
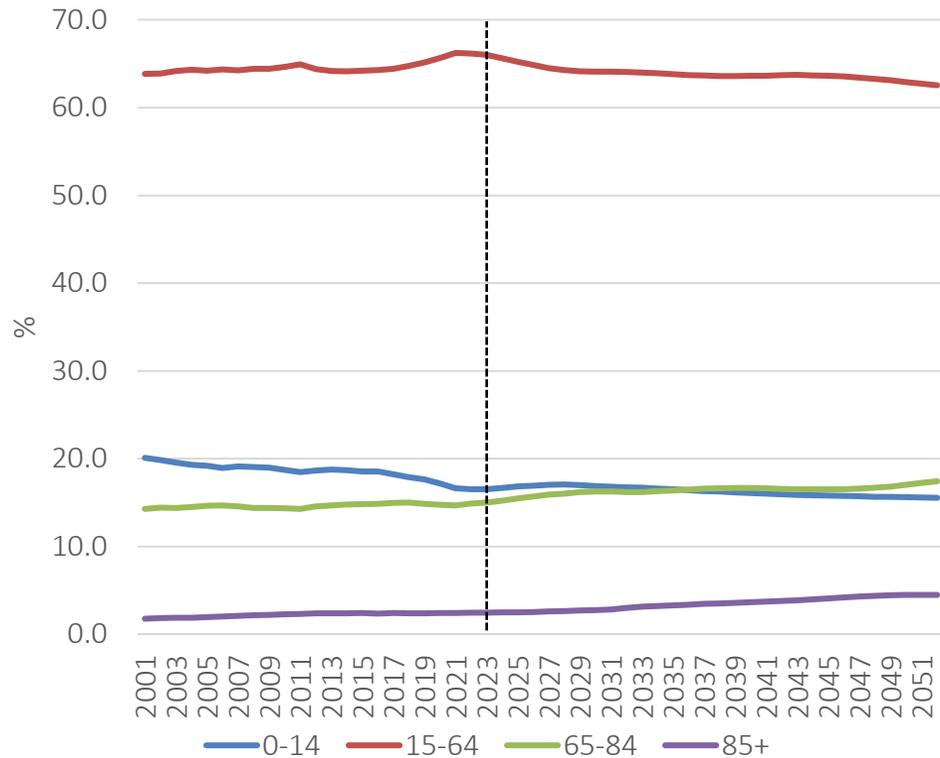
Natural increase will remain positive but decline over the period due to ageing, lower fertility rates and a smaller size of the reproductive cohort (women aged 15 to 49 years)



Projected Population Age Structure



Projected population by age cohort



The future?

Demographic change in local government areas in Tasmania is influenced by state and national circumstances.

Tasmania is now coming off the back of a very volatile period in terms of demographic change.

Prior to the pandemic, Tasmania recorded the highest population growth rates this century.

- Over 80% of the growth came from migration
 - Largely unknown
 - Difficult to plan for
 - Highly volatile, subject to external shocks

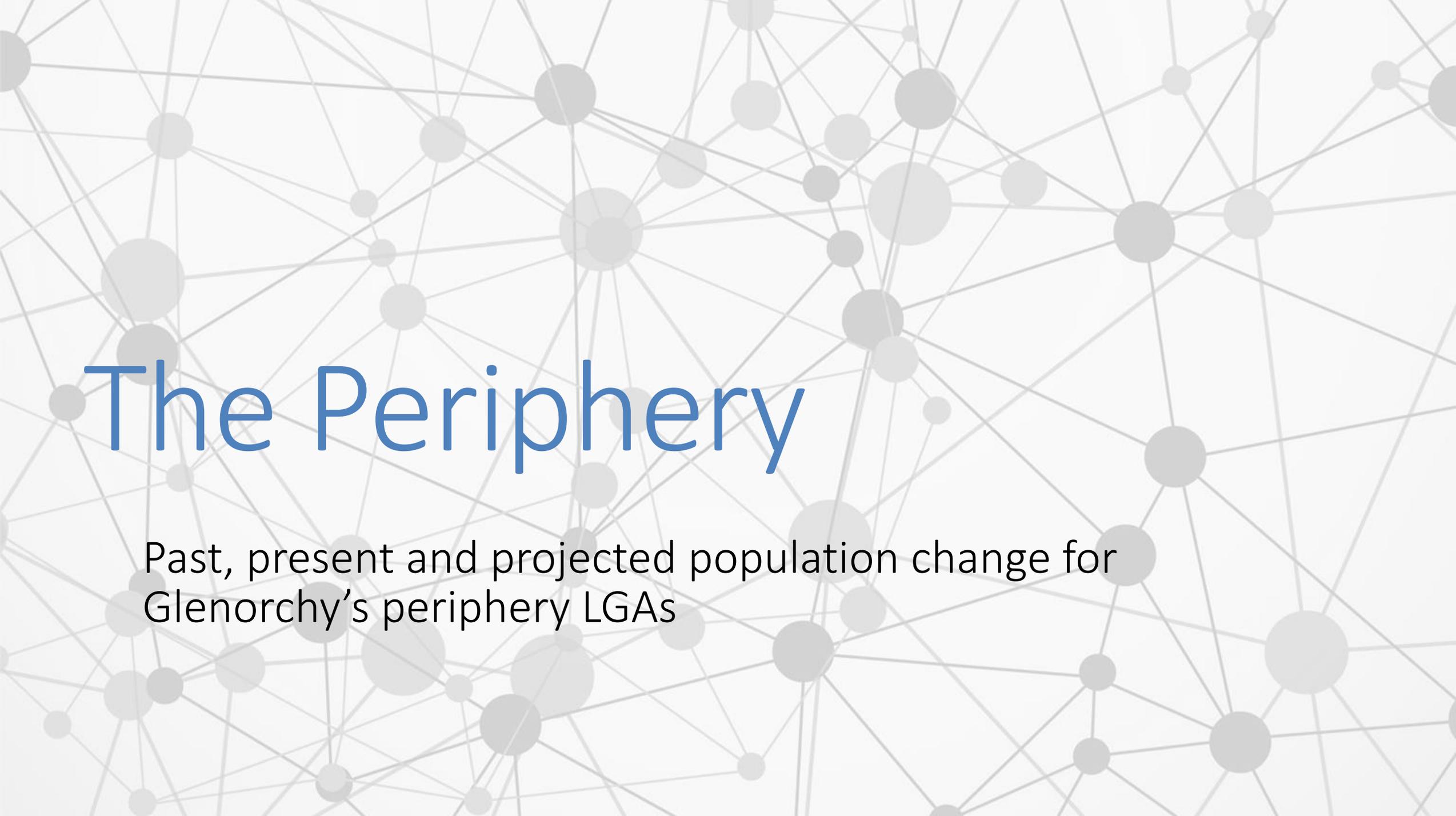
Since the pandemic:

- Population growth rates are now the lowest since 2012
- Net Interstate Migration is negative and has been for two years
- Overseas migration is playing catch up BUT policies are being overhauled
 - New migration policy
 - International education capped and now visa cost increase
- Total Fertility Rate is continuing to decline
- Natural increase (different between births and deaths) is lowest on record

All of these factors impact local government areas differently

Demographic change and projected population change needs to be considered in context with its periphery and the state and national policy positions.

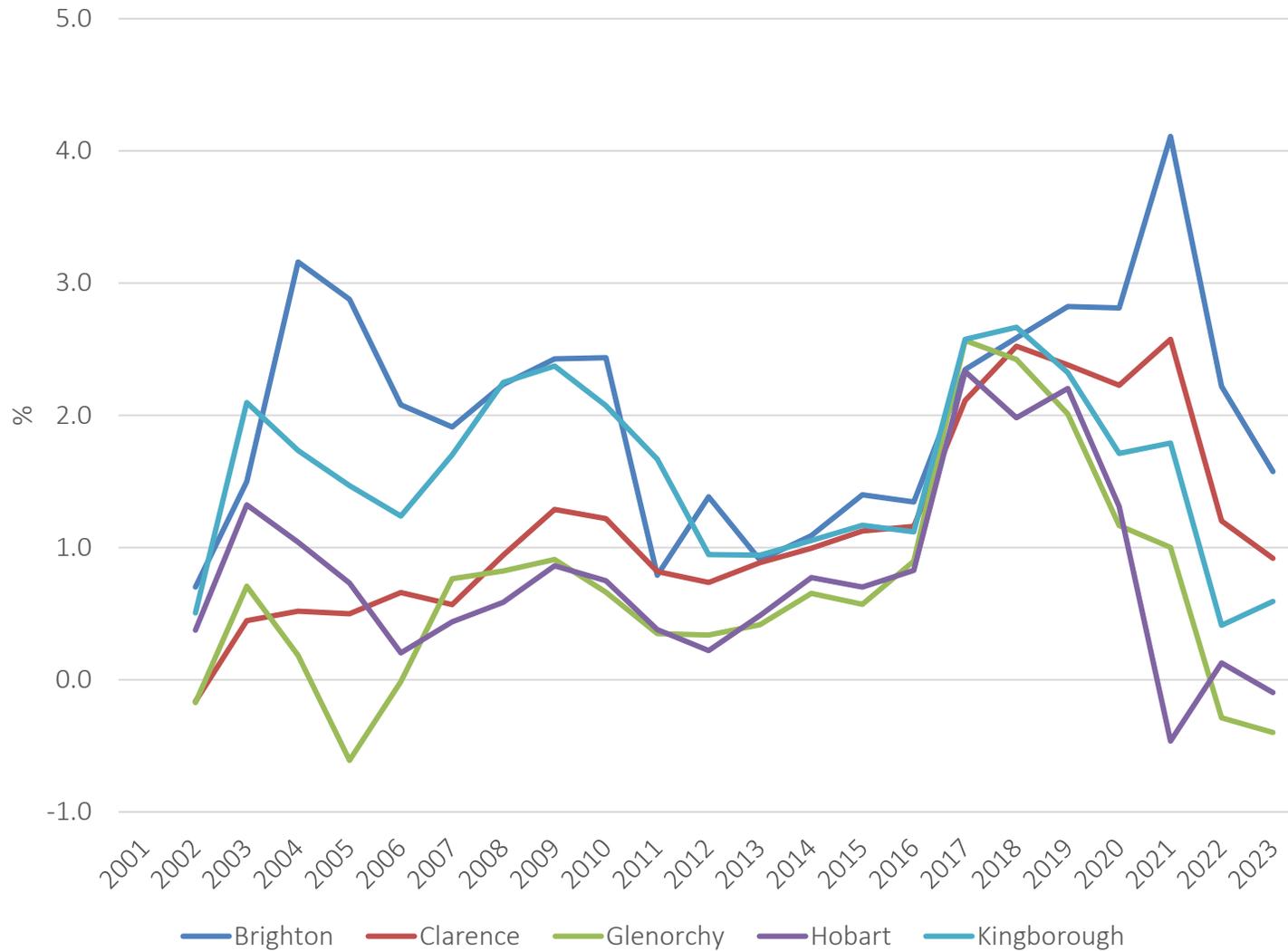


A background graphic consisting of a complex network of interconnected nodes and lines. The nodes are represented by circles of varying sizes, and the lines are thin, light gray, connecting the nodes in a web-like structure. The overall color palette is light gray and white.

The Periphery

Past, present and projected population change for
Glenorchy's periphery LGAs

Periphery LGAs: Population change rate



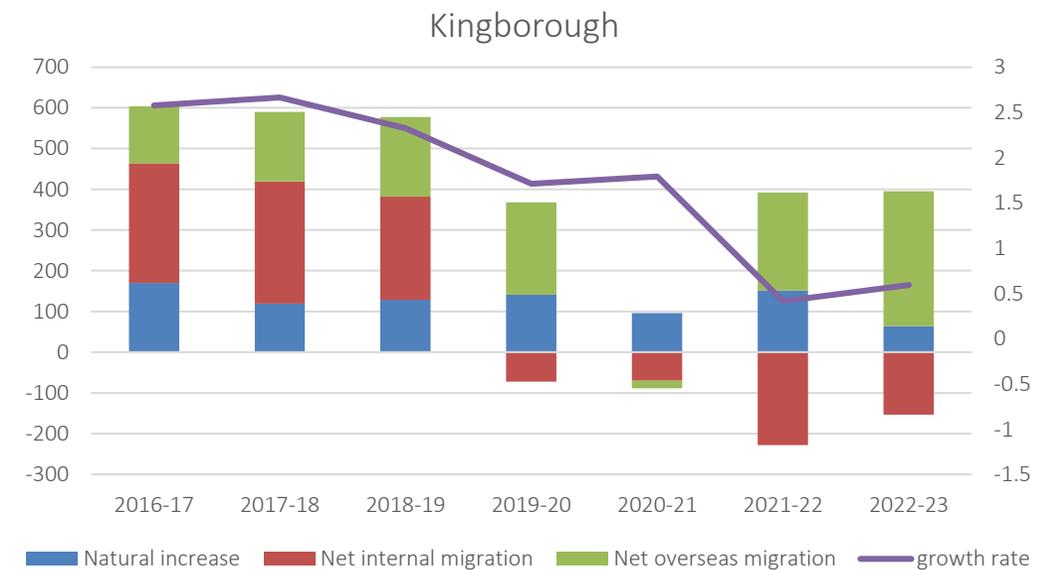
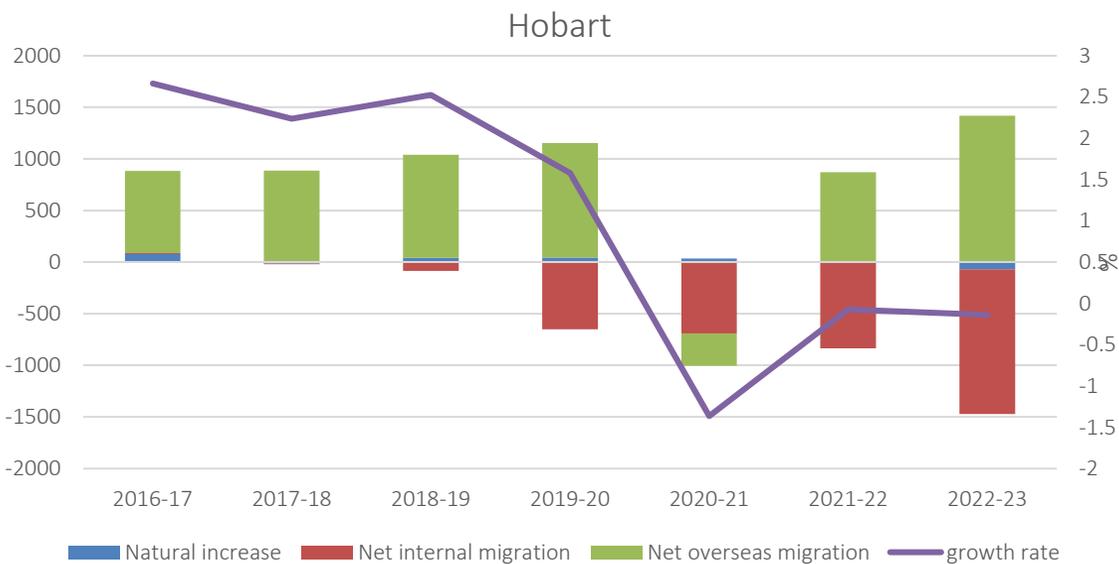
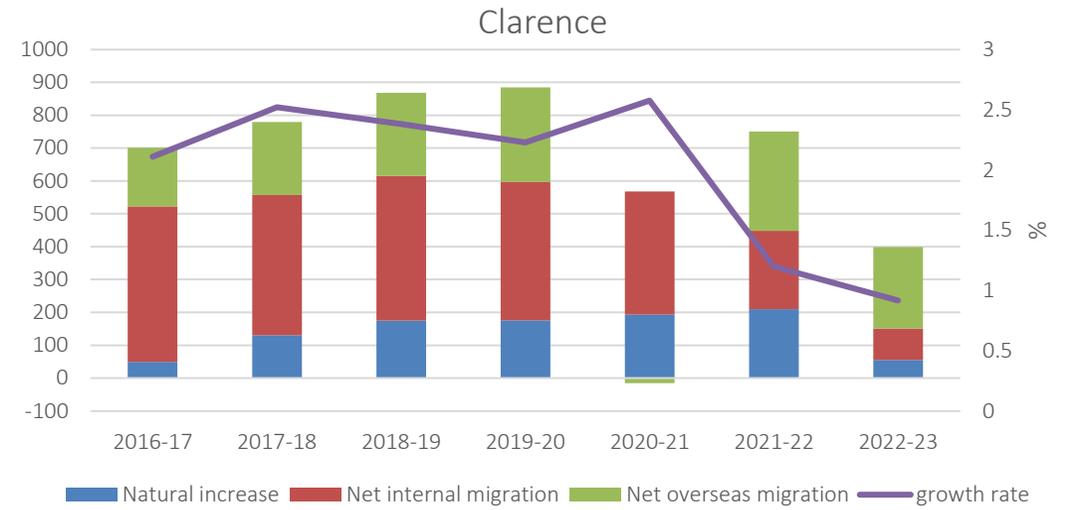
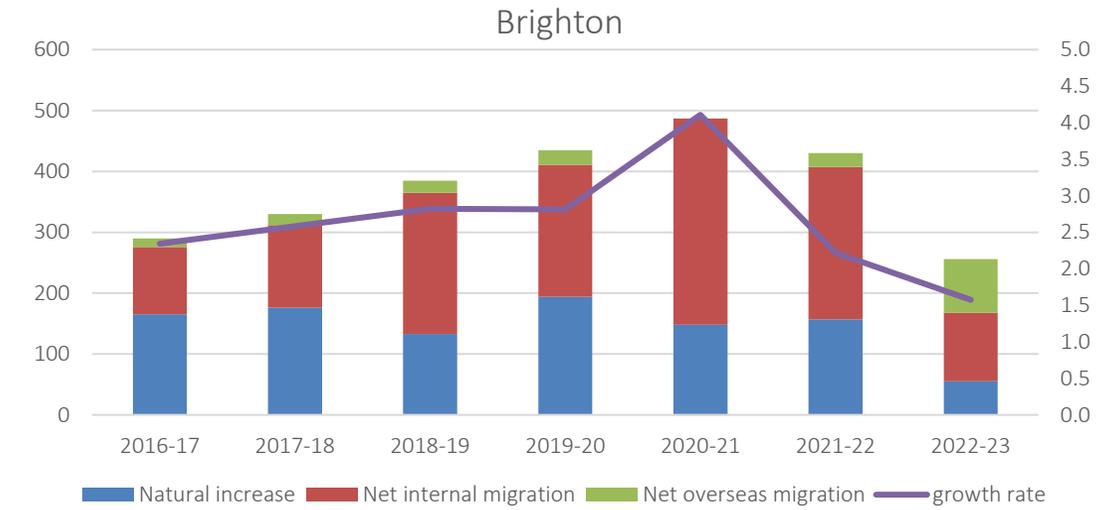
Not linear

Similar pattern

Incredibly volatile

Can lead to reactive planning

Components of population change



Top 10 Greater Hobart SA2s

SA2	Growth	Driver
Rokeby	323	Internal Migration
Kingston-Huntingfield	161	Overseas Migration
Sorell-Richmond	150	Migration
Bridgewater-Gagebrook	137	Natural increase, internal migration
Hobart	131	Overseas migration
Austins Ferry-Granton	129	Internal migration
New Norfolk	107	Internal migration
Risdon Vale	102	Internal migration
Brighton-Pontville	90	Natural increase
Howrah-Tranmere	81	Overseas migration

SA2	Decline	Driver
Sandy Bay	-129	Natural decline, internal migration
Glenorchy	-123	Natural decline, internal migration
New Town	-109	Natural decline, internal migration
Montrose-Rosetta	-96	Internal migration
West Moonah	-88	Internal migration
Moonah	-87	Internal migration
Derwent Park-Lutana	-55	Internal migration
Mornington-Warrane	-51	Internal migration
Lindisfarne-Rose Bay	-47	Natural decline
Taroona-Bonnet Hill	-23	Internal migration

Source: ABS, Regional Population, 2023

Population projections – Periphery LGAs

Average annual growth rate between 2023 and 2038

Glenorchy – 0.32%

Brighton – 1.25%

Clarence – 0.71%

Hobart – 0.35%

Kingborough – 0.93%

Average annual growth rate between 2023 and 2053

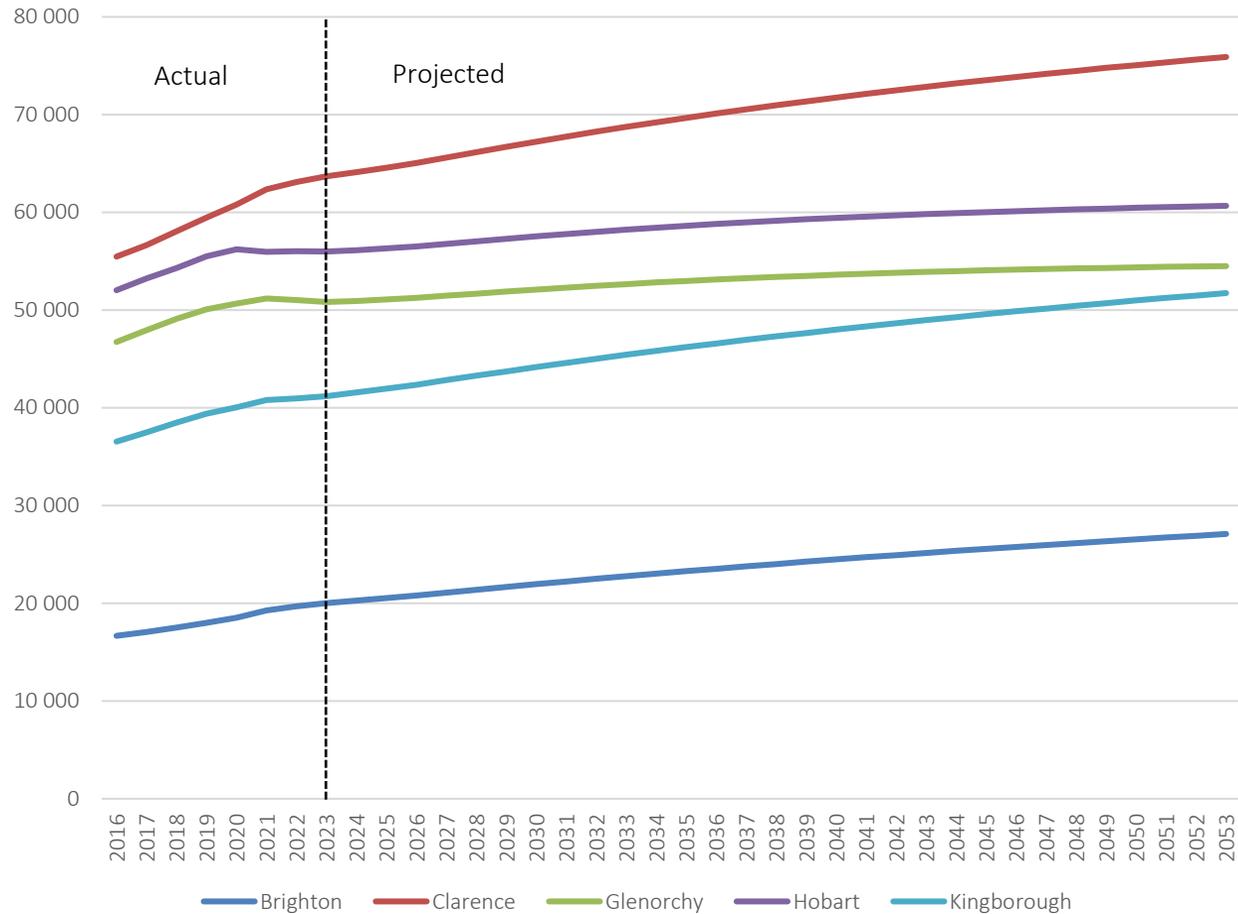
Glenorchy – 0.23%

Brighton – 1.4%

Clarence – 0.62%

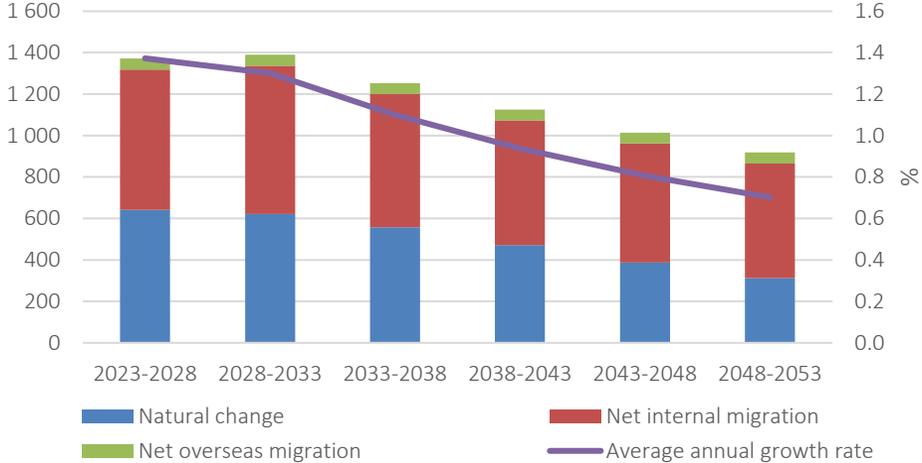
Hobart – 0.27%

Kingborough – 0.83%

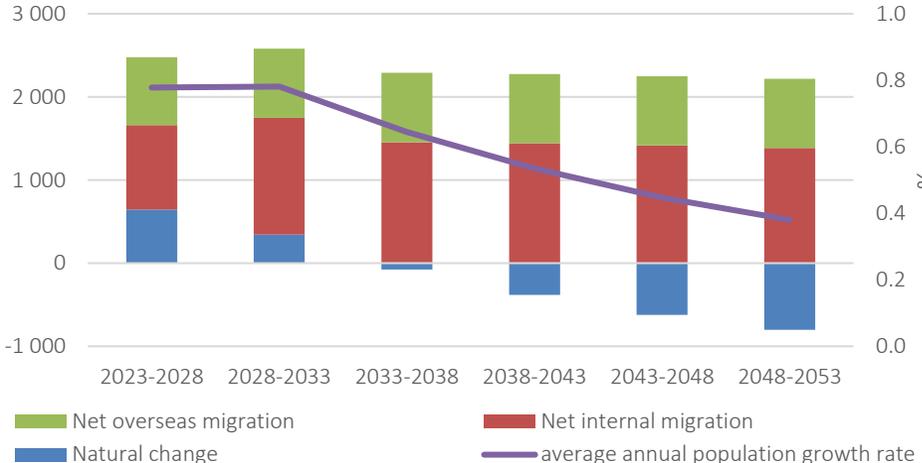


Projected components of population change

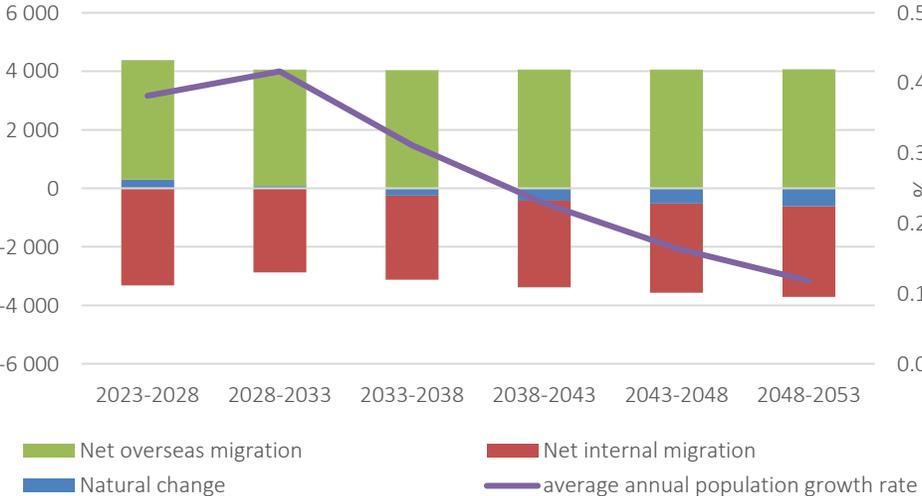
Brighton



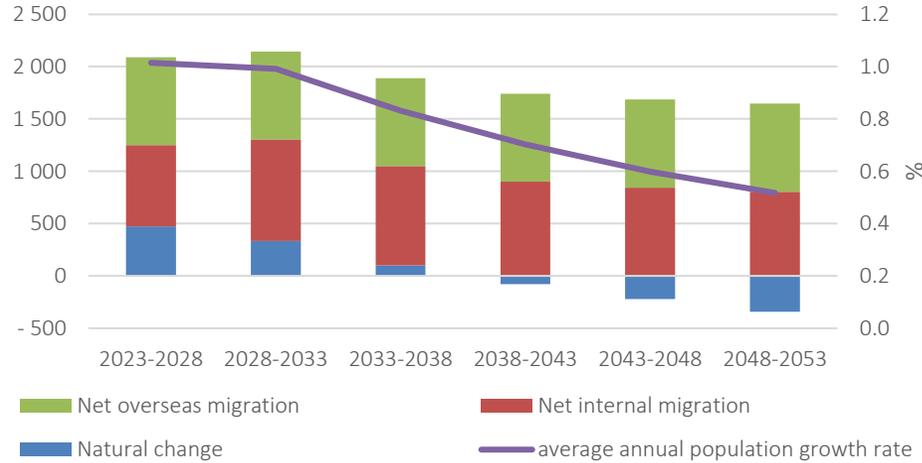
Clarence



Hobart



Kingborough



Uncertainty is a given

Because of the reliance on migration for population growth, the future will be more uncertain and difficult to plan for

Yet-to-be-developed policies or changes to existing policies will have either a direct or indirect influence on demographic change

The population age structure will continue to change regardless of growth rate or population size

Will have an impact on the community you serve and the infrastructure, services and amenities they need

Population ageing is unavoidable - even if the older population doesn't live in Glenorchy it will have an impact



Key messages

Demographic change is dramatic over time, incremental in time. But, it can be shaped.

Glenorchy's socio-demographic profile has changed considerably in the recent past.

Population change is the aggregated outcome of decisions made by individuals, couples and families.

Context matters.

What happens on the periphery matters.

Population projections are not forecasts, but insight into the future based on the recent past.

It is important to keep tracking population change against projections and inter-censal socio-demographic changes.

In the long run, population ageing is unavoidable.



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