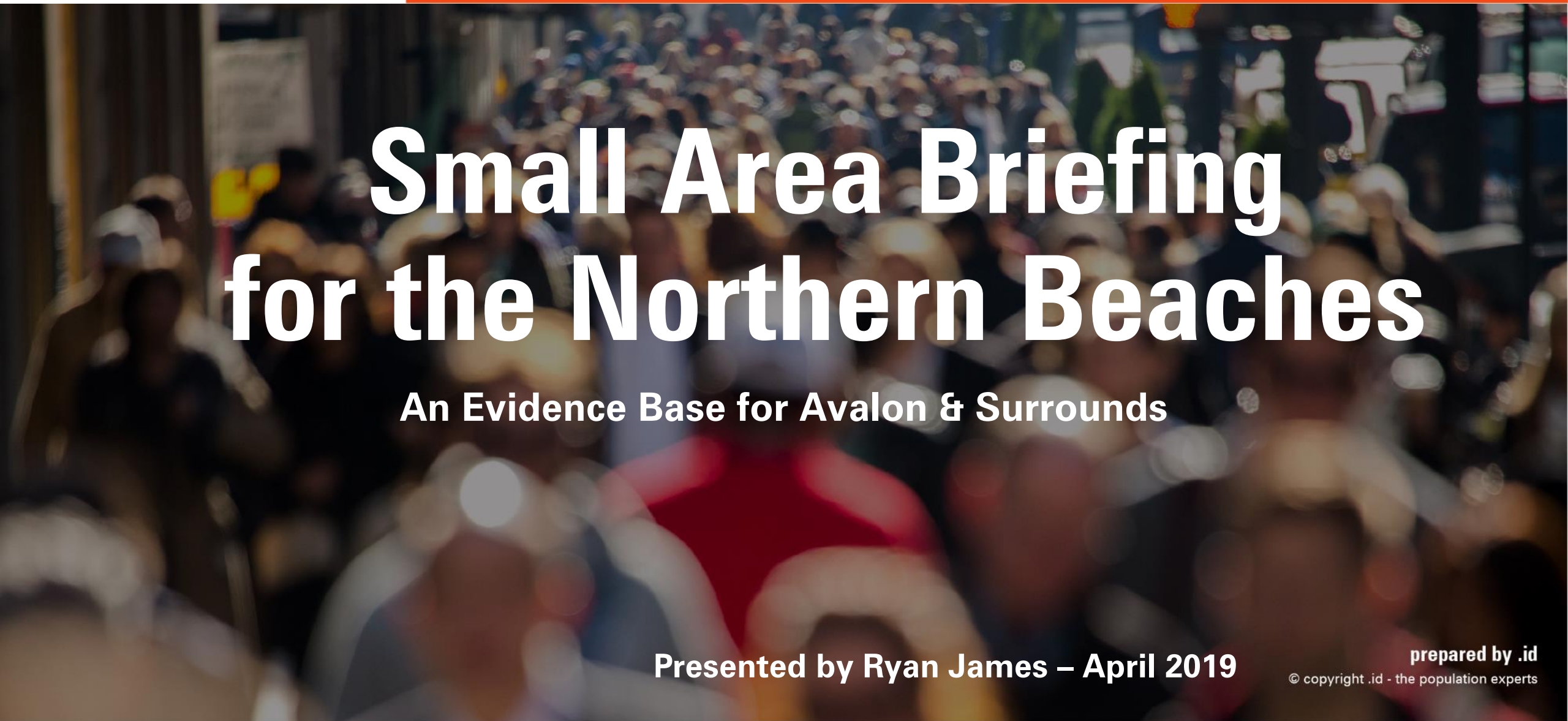

Small Area Briefing for the Northern Beaches

An Evidence Base for Avalon & Surrounds

Presented by Ryan James – April 2019

prepared by .id

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.idconsulting

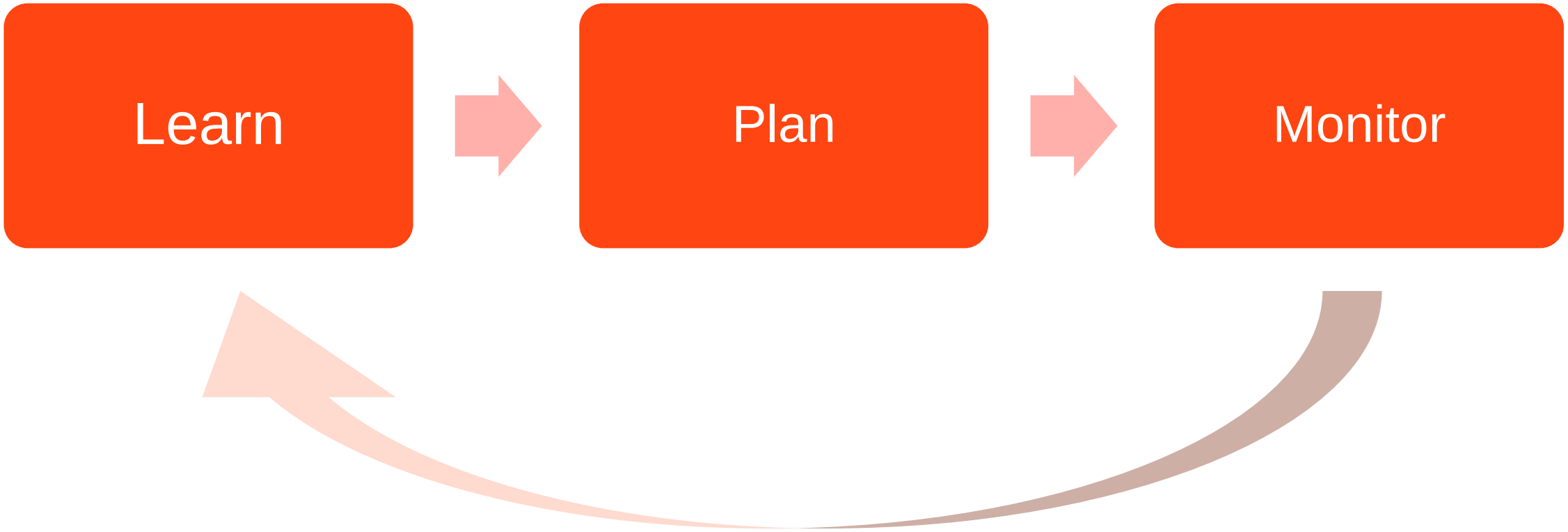
A team of demographic, economic, forecast & housing experts who provide evidence and stories to:

Make better decisions

Advocate for your Community

Shape Strategy and Policy

Evidence-Based Decision Making



.id online tools for Local Government…

profile.id — Learn about your community and how it is changing

atlas.id — Identify where resources are needed most with easy-to-use maps

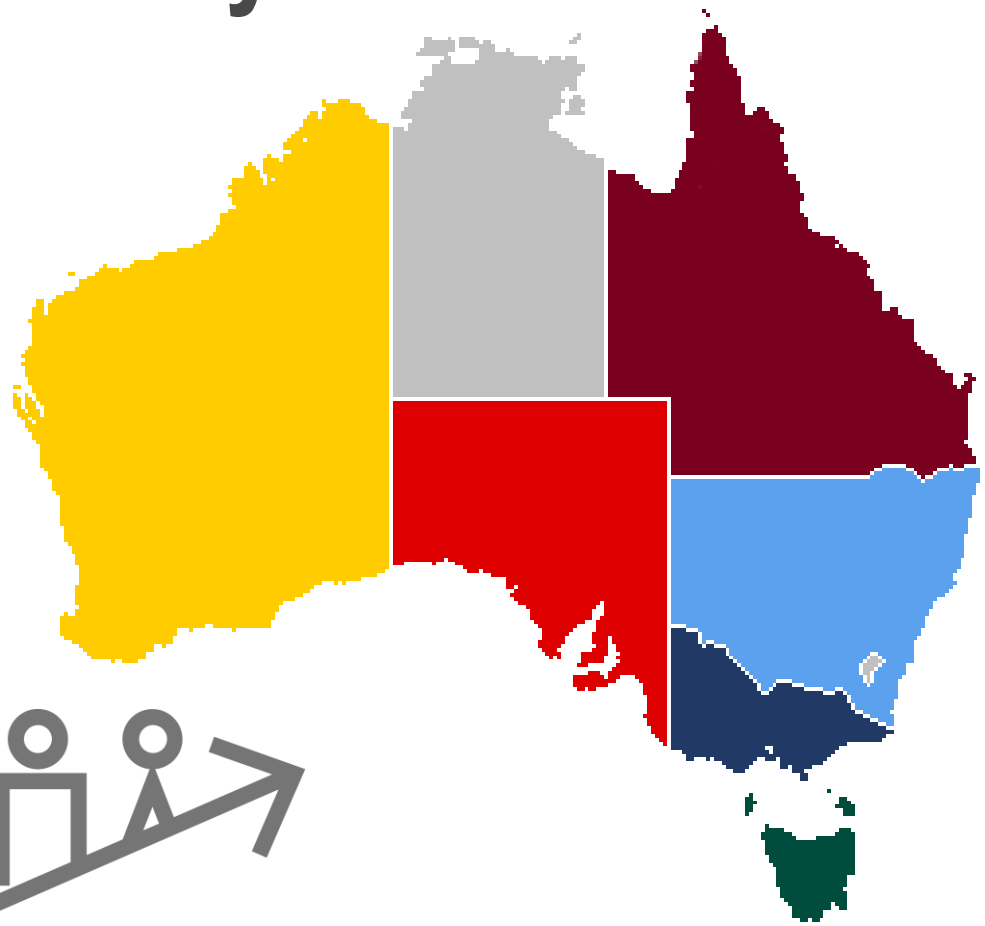
forecast.id — Understand the characteristics of your future population

economy.id — Analyse jobs, workers and industry in your area

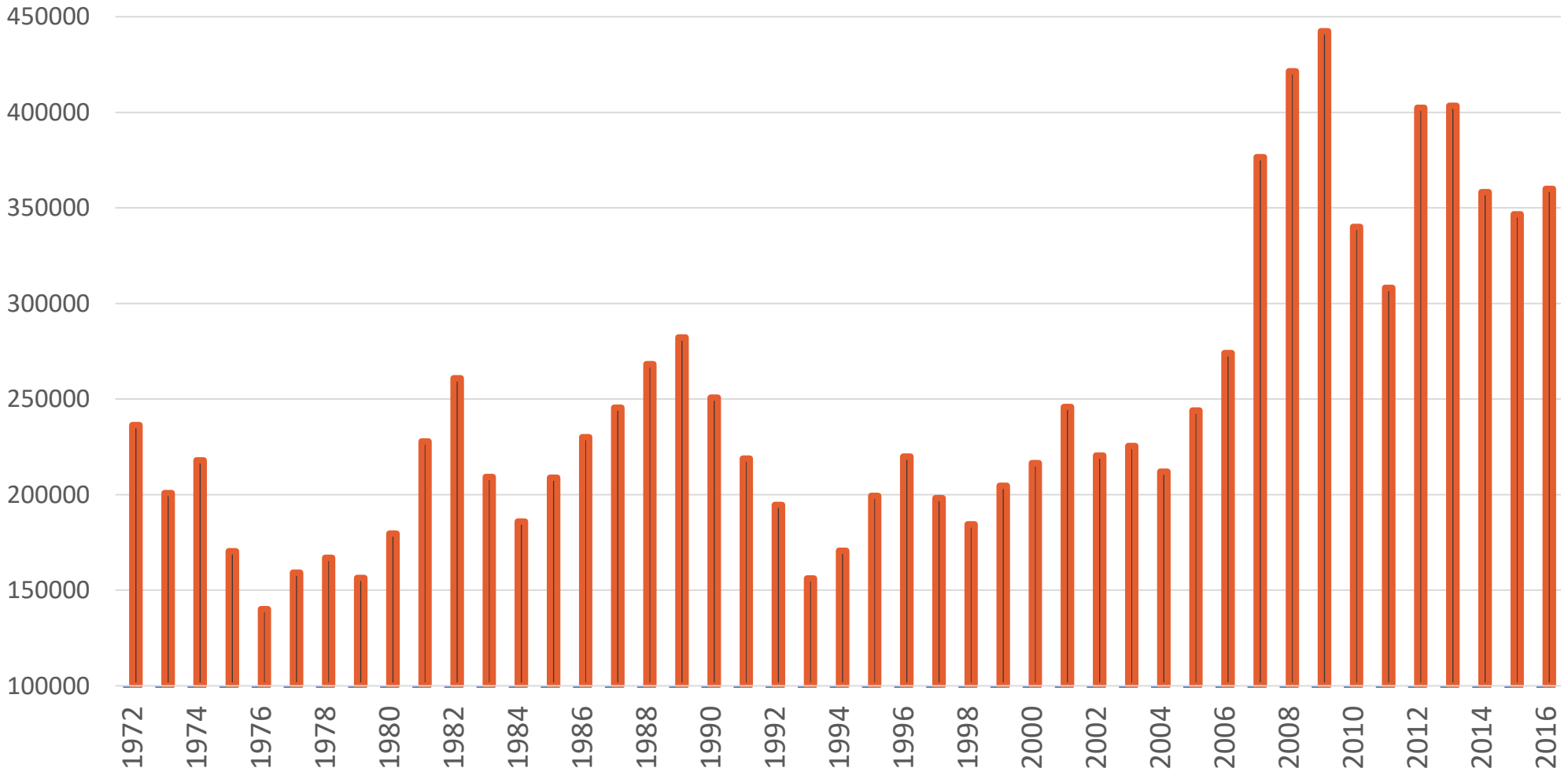
.id services in Action…

- Grants and Funding submissions
- Strategic Planning
- Social Planning
- Economic Development
- Social and Economic Impact Assessments
- Housing Analysis – Scenario Testing, Affordability, Capacity Analysis
- Service Planning
- Corporate Plans
- Infrastructure Scheduling
- Population and Employment Projections
- Health and Wellbeing Planning
- Open Space Planning
- Communications & Marketing
- Community Engagement
- Assets Management

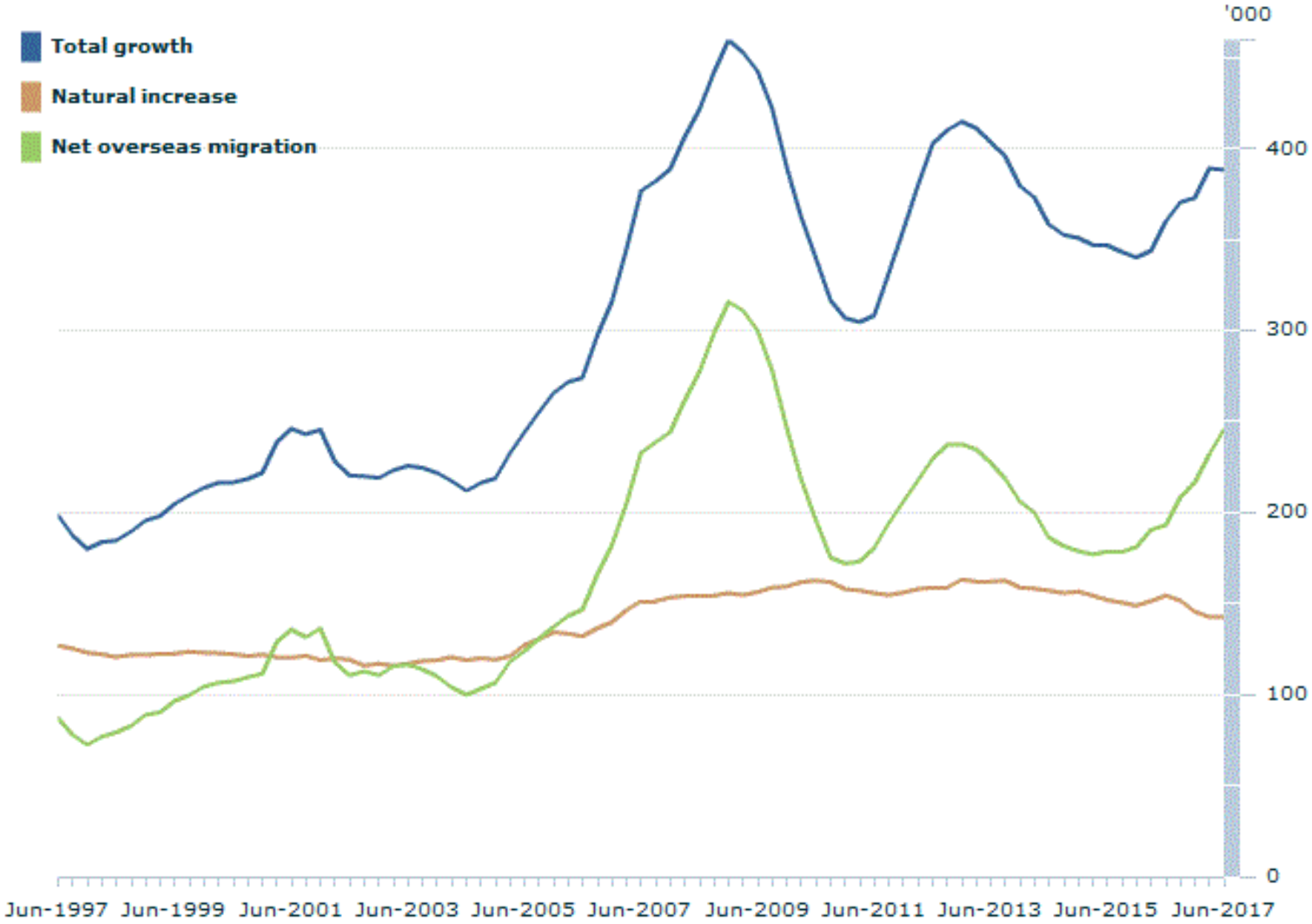
The Macro Story…



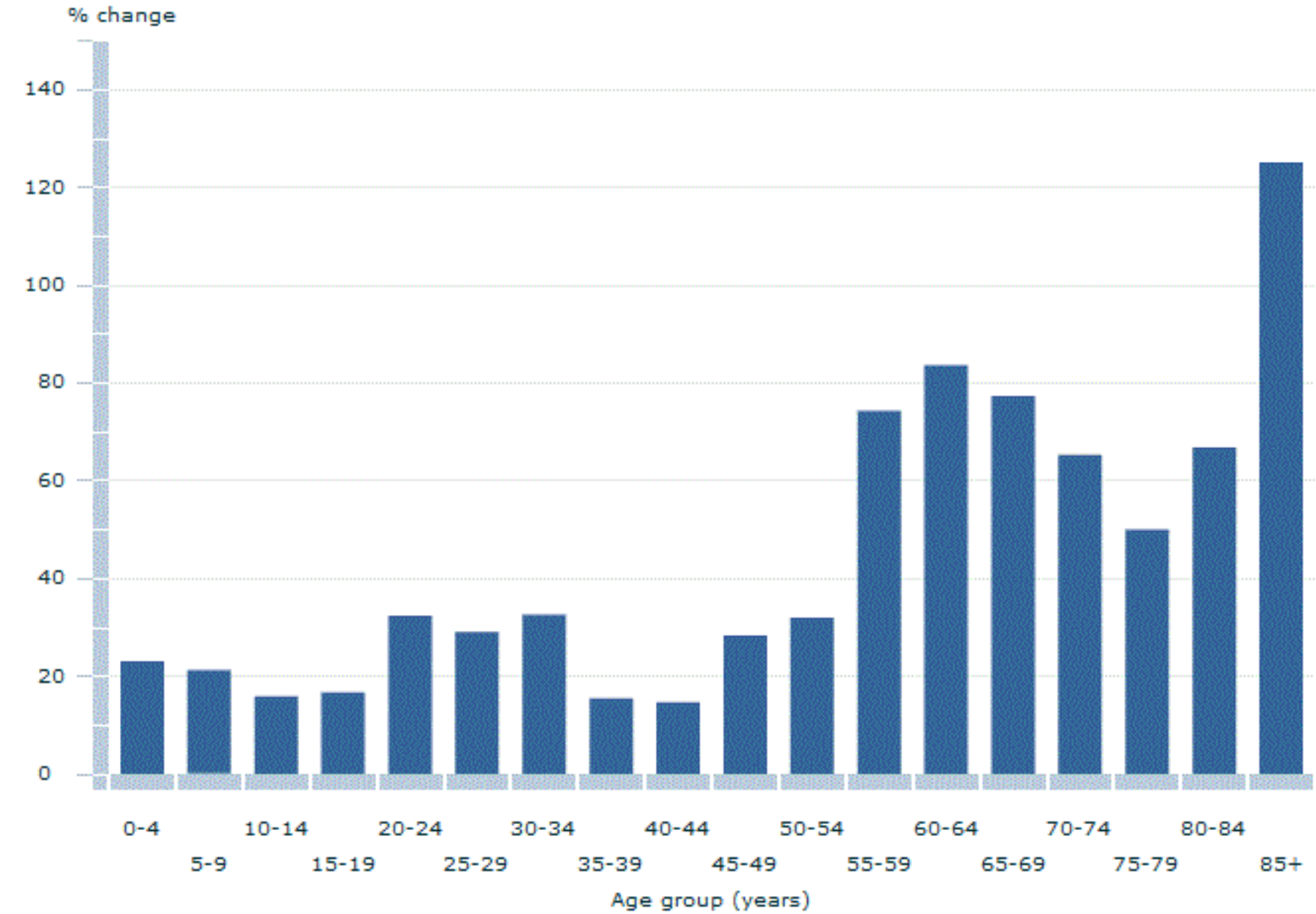
National Population Growth 1972 - 2016



Components of annual population growth (a)(b), Australia



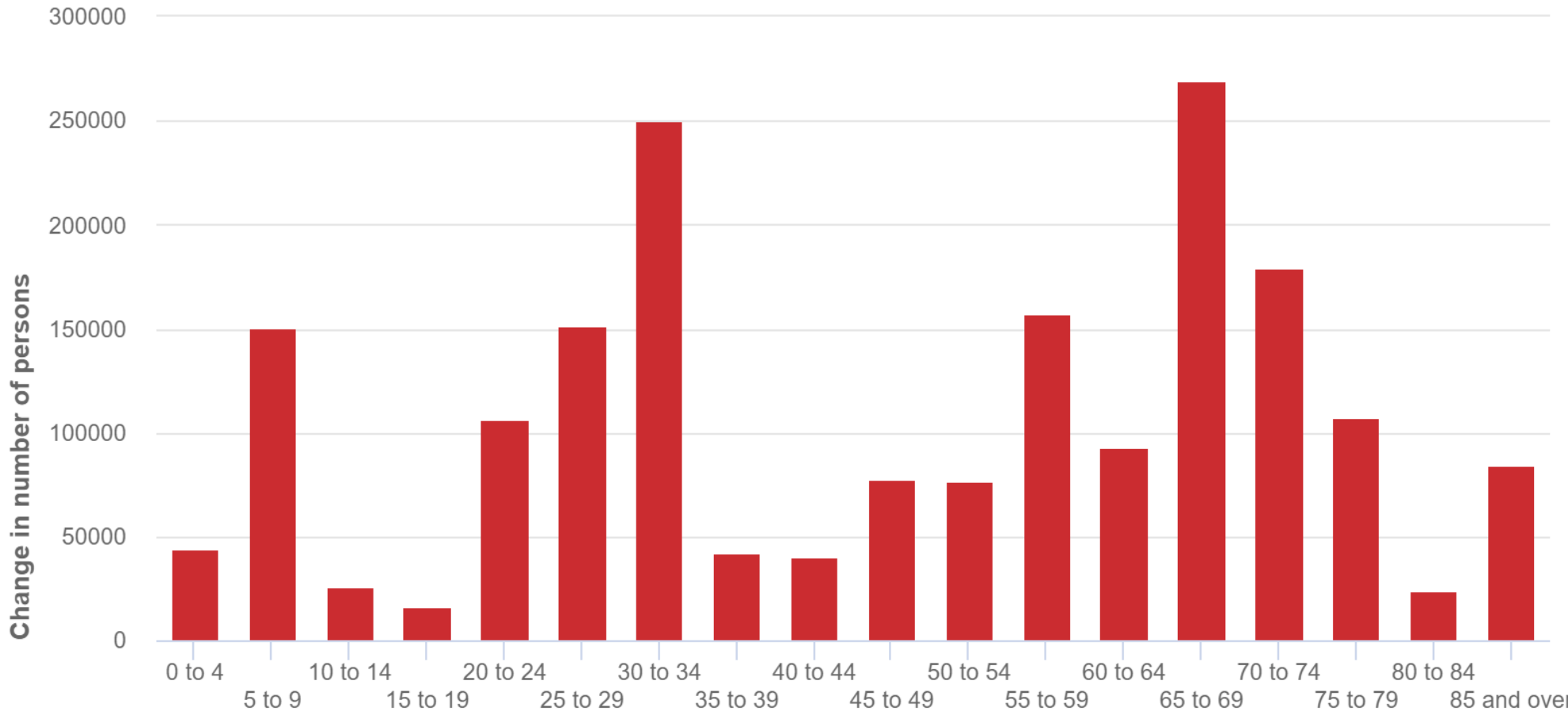
Population change, Age group - 1998 to 2018



Source(s): Australian Demographic Statistics, June quarter 2018

Change in age structure - five year age groups, 2011 to 2016

Australia - Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

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Population Clock

25,301,206

One person every 1 minute and 14 seconds

Northern Beaches…

Estimated Resident Population (ERP)

Northern Beaches Council area

Population

271,278

ERP, 2018

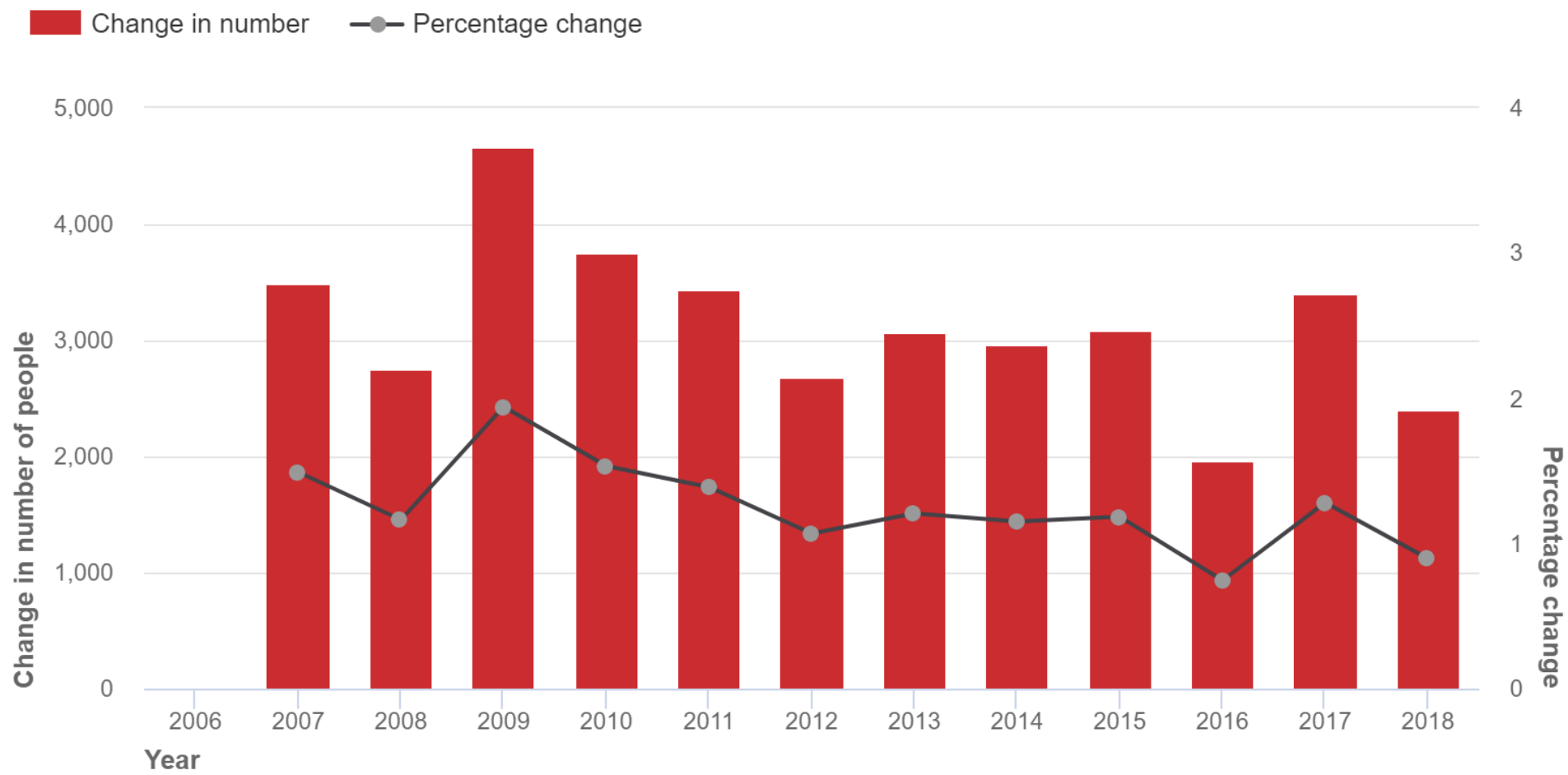
▲ Grown by 2,408 from the previous year.

Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0). Compiled and presented by .id the population experts

.id the population experts

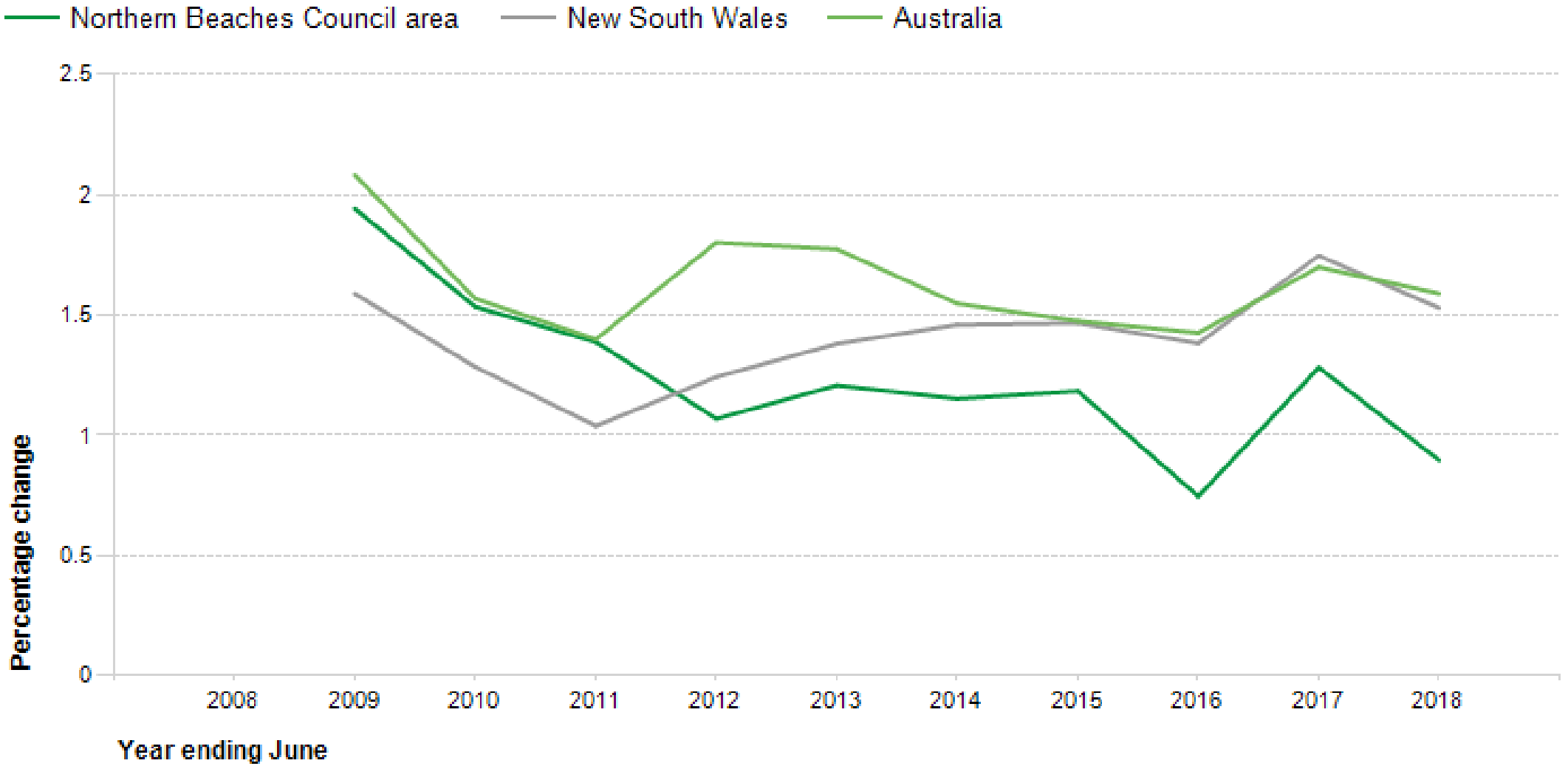
Annual change in Estimated Resident Population (ERP)

Northern Beaches Council area



Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0). Compiled and presented by .id the population experts

Estimated Resident Population (ERP)



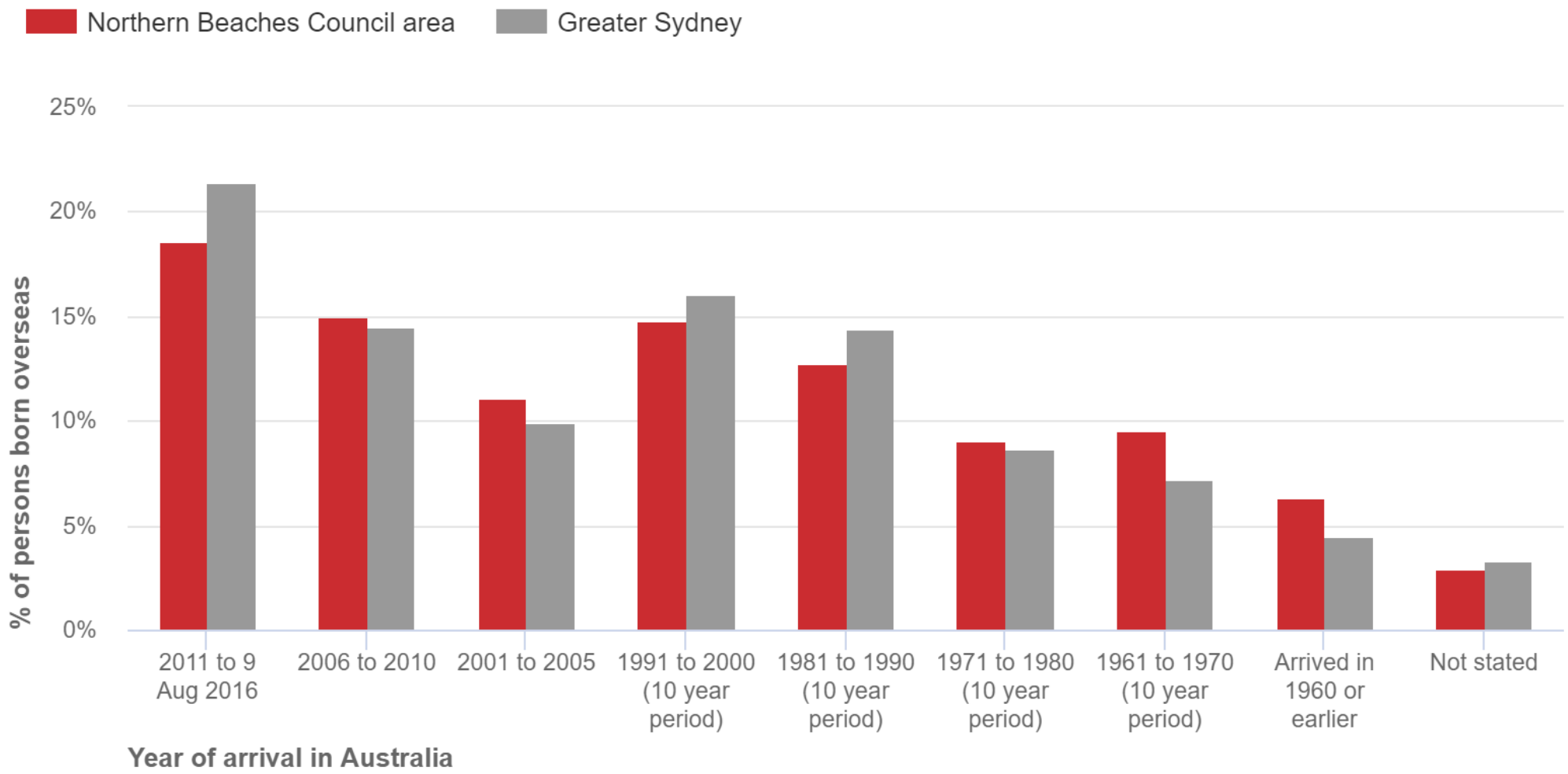
Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0). Compiled and presented in economy.id by .id, the population experts

Components of change – Northern Beaches 2017/2018

Natural increase	Net internal migration	Net overseas migration
1,627	-1,928	2,709

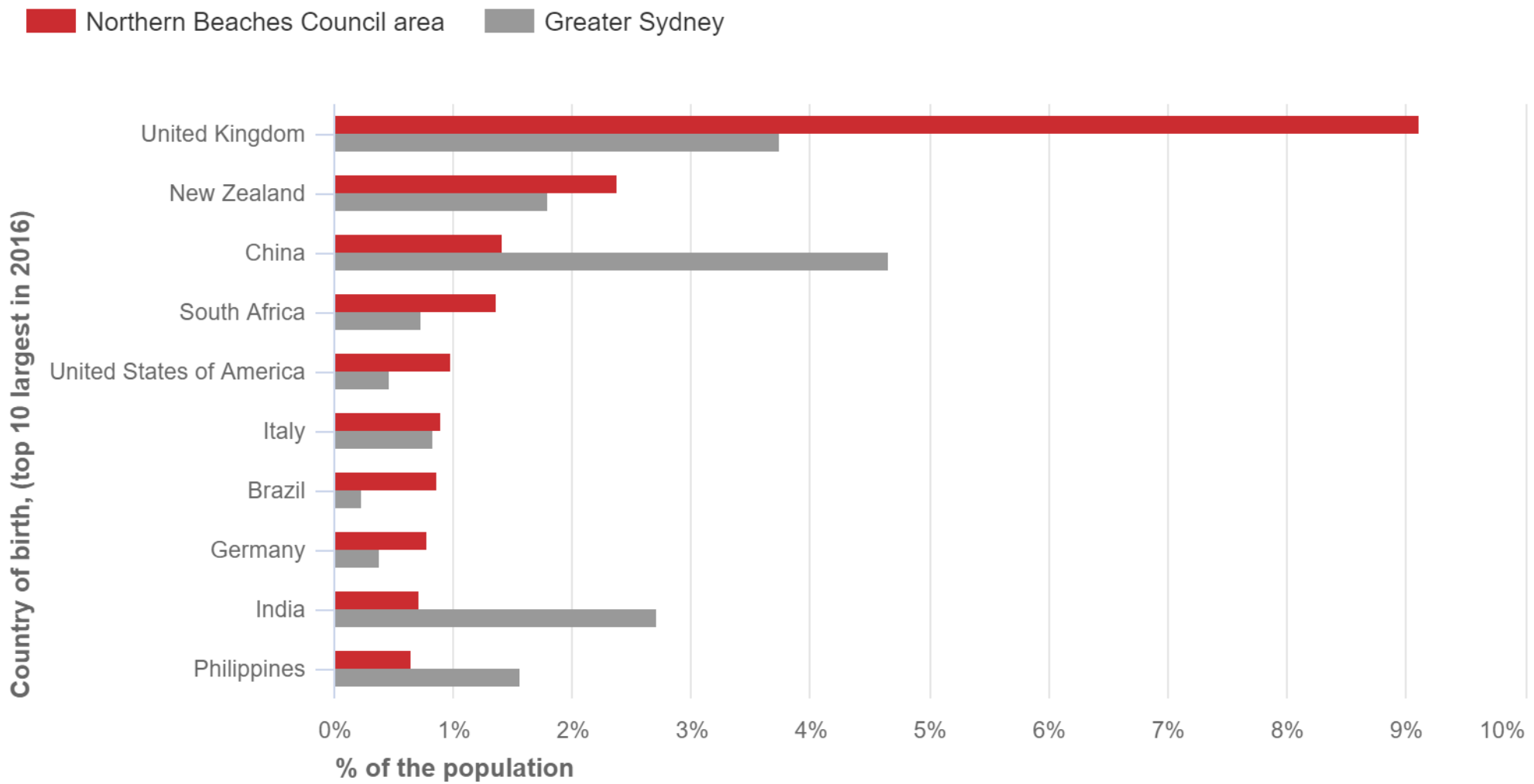
Overseas arrivals, 2016

Total persons



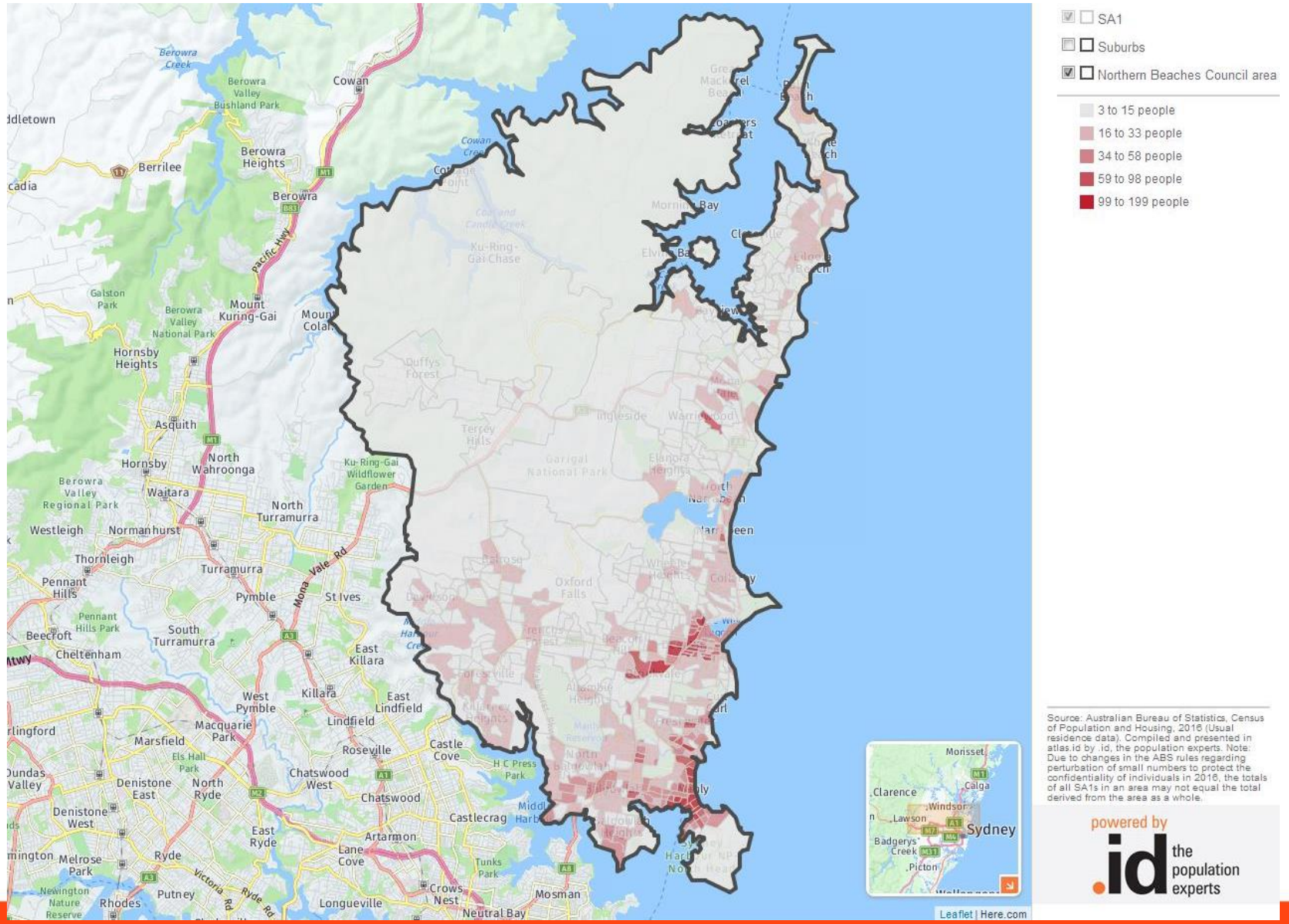
Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Birthplace, 2016

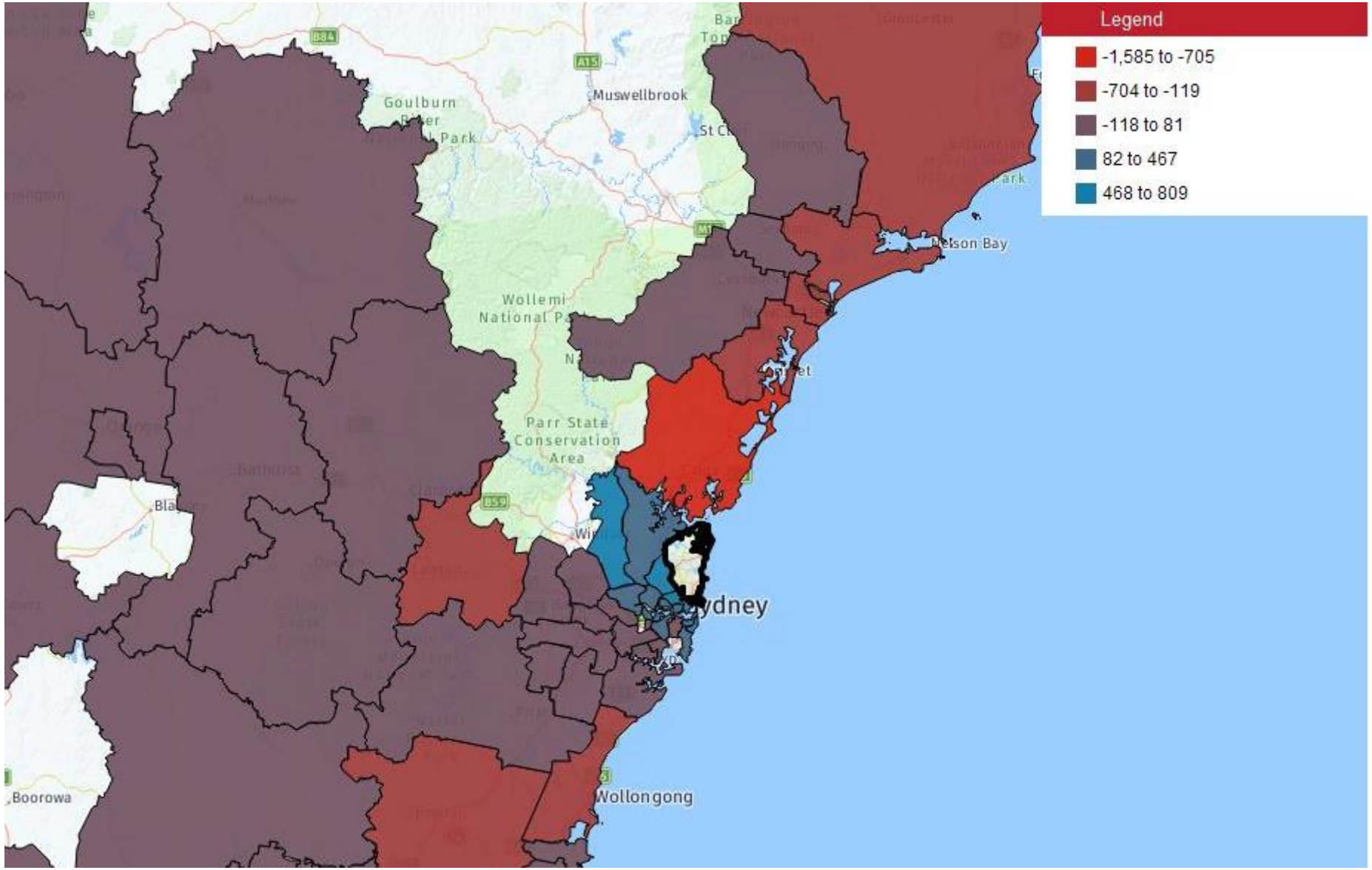


Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Northern Beaches Council, Overseas arrivals to Australia between 2011 and 2016



Historical migration flows, Northern Beaches Council area, 2011-2016



Residential Migration - Northern Beaches Council area - between 2011 and 2016

Net gains by LGA

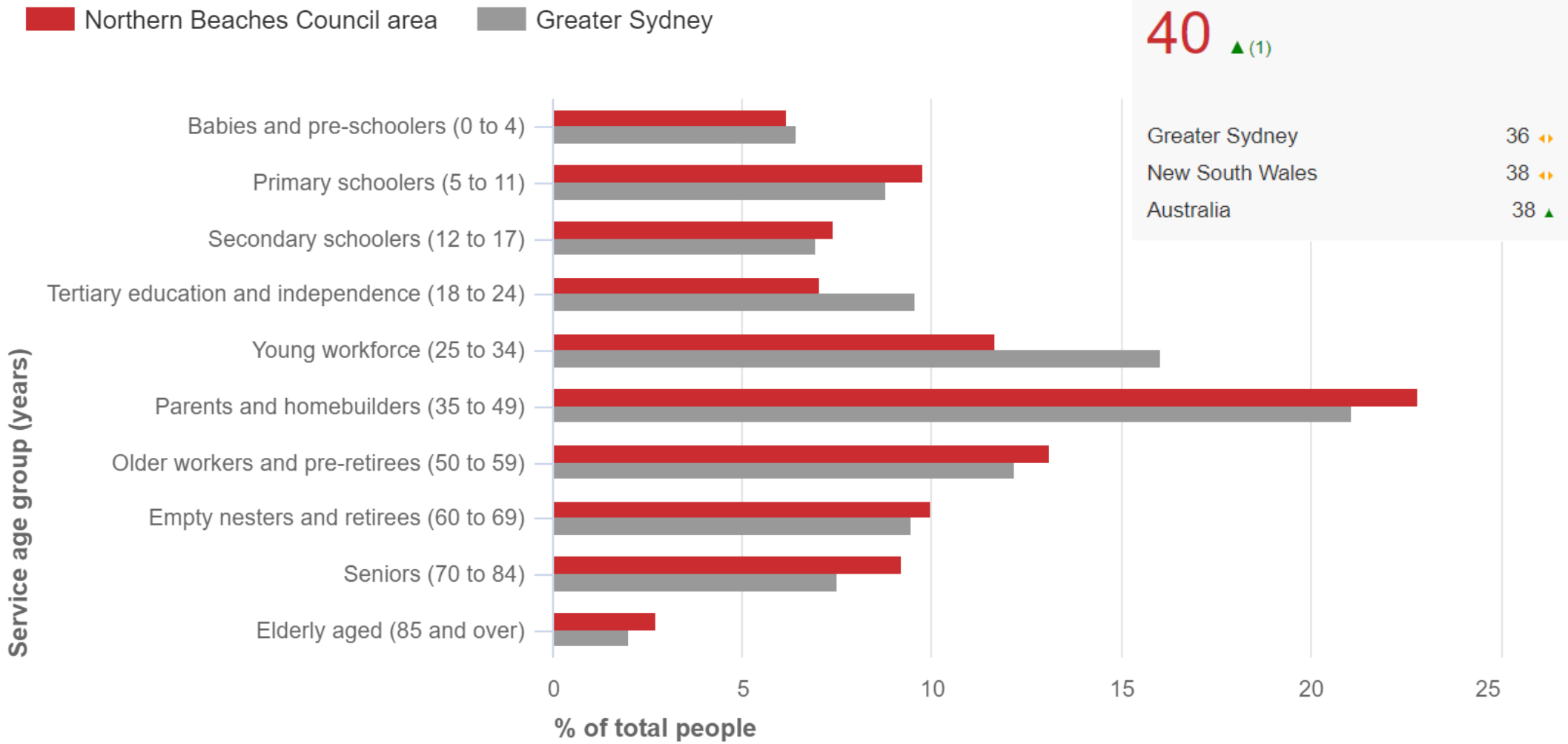
LGA	In migration	Out migration	Net migration
Ku-ring-gai (A)	2,222	1,413	+809
Willoughby (C)	1,642	915	+727
Waverley (A)	810	244	+566
Mosman (A)	1,317	767	+550
The Hills Shire (A)	824	356	+468
North Sydney (A)	2,008	1,595	+413
Parramatta (C)	742	372	+370
Hornsby (A)	1,151	791	+360
Inner West (A)	1,145	832	+313
Randwick (C)	658	351	+307

Net losses by LGA

LGA	In migration	Out migration	Net migration
Central Coast (C) (NSW)	755	2,340	-1,585
Gold Coast (C)	375	1,079	-704
Sunshine Coast (R)	125	503	-378
Port Macquarie-Hastings (A)	110	450	-340
Lake Macquarie (C)	132	441	-309
Tweed (A)	71	349	-278
Unincorporated ACT	322	582	-260
Newcastle (C)	142	385	-243
Byron (A)	92	326	-234
Mid-Coast (A)	157	389	-232

Age structure - service age groups, 2016

Total persons



Median age

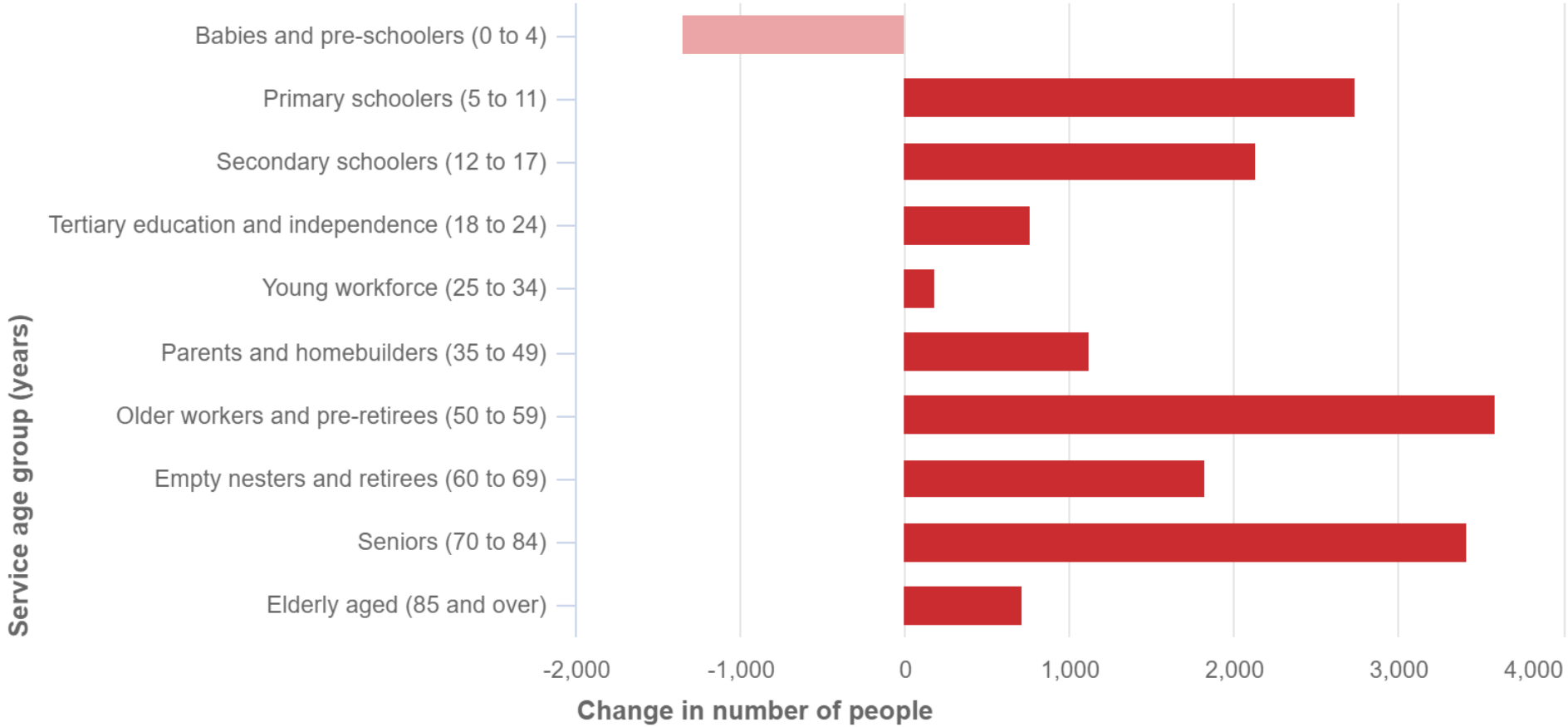
40 ▲ (1)

Greater Sydney	36
New South Wales	38
Australia	38 ▲

Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

Change in age structure - service age groups, 2011 to 2016

Northern Beaches Council area - Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

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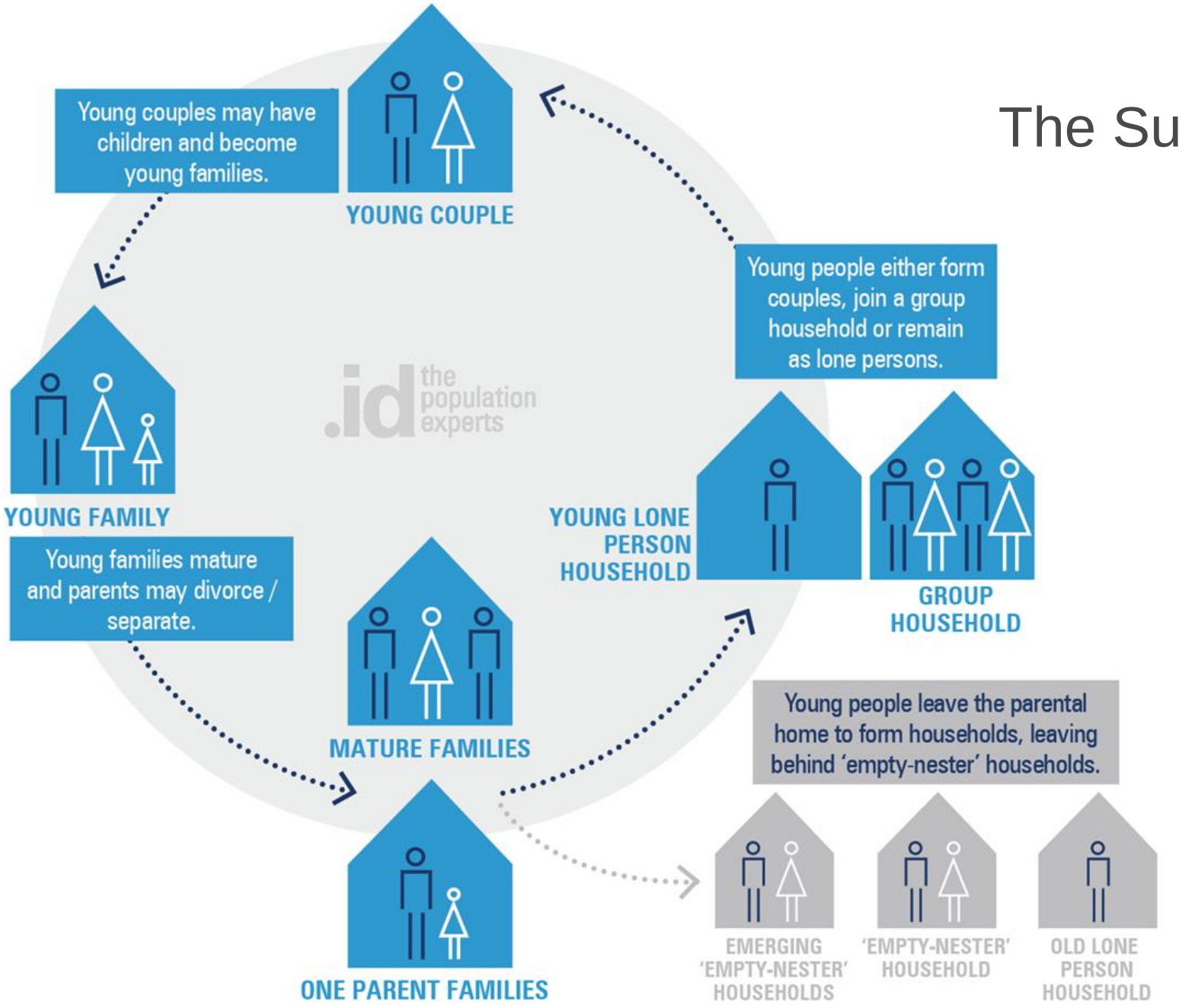
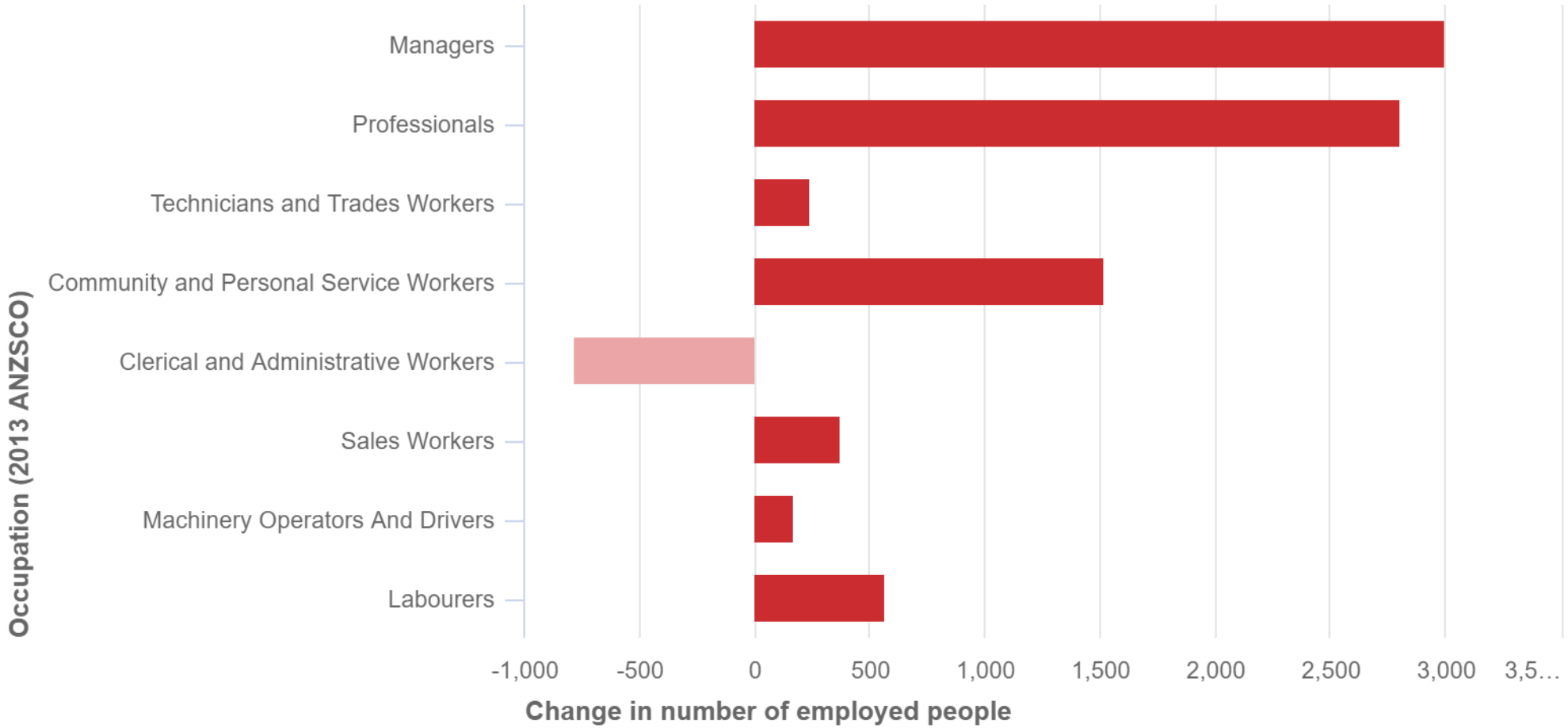
The Suburb Lifecycle



Change in occupation of employment, 2011 to 2016

Northern Beaches Council area - Total employed persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Usual residence data). Compiled and presented in profile.id by .id, the population experts.

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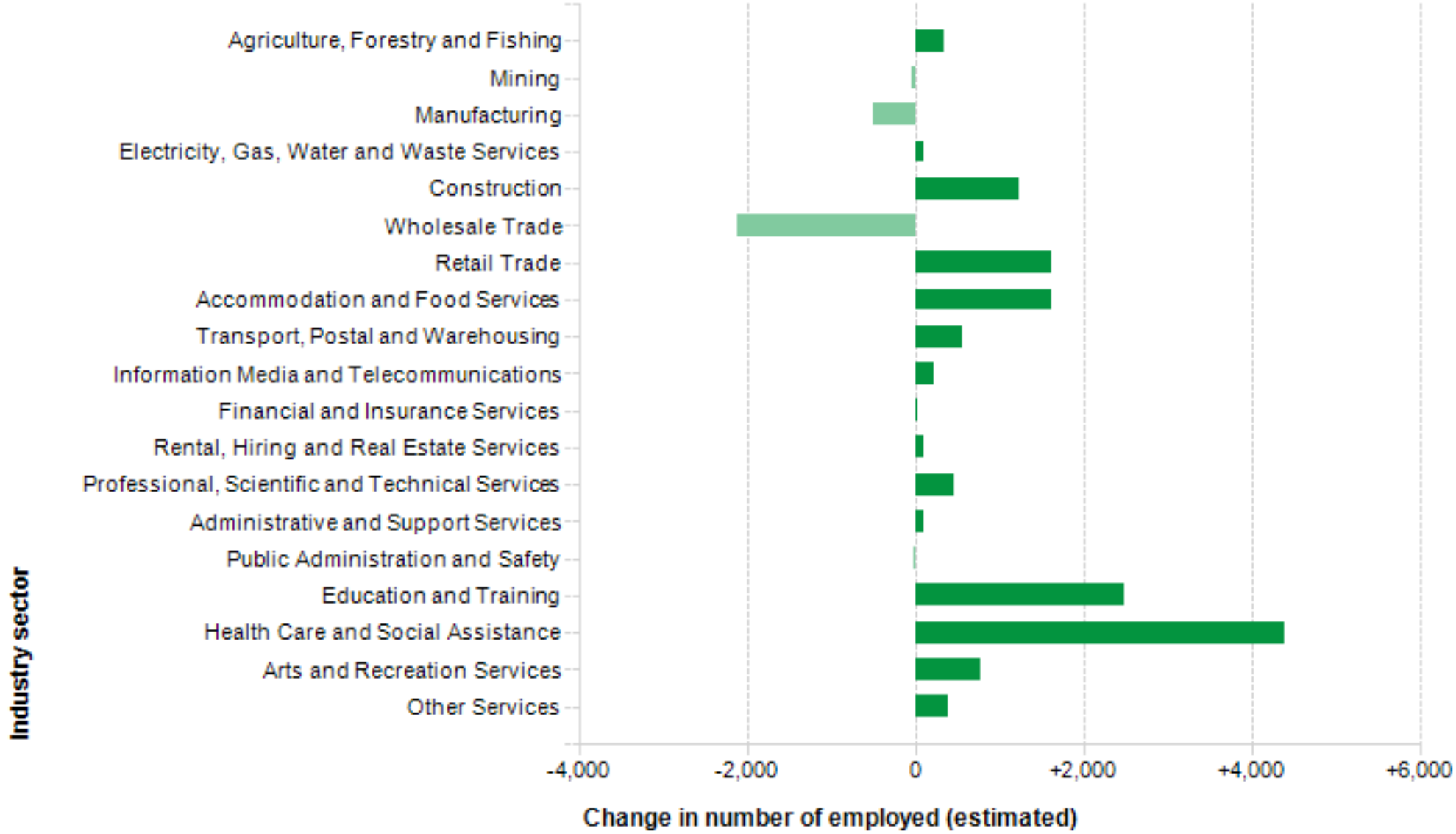
Change in employment (total) by industry, 2012/13 to 2017/18

Northern Beaches Council area



Source: National Institute of Economic and Industry Research (NIEIR) ©2018
Compiled and presented in economy.id by .id the population experts

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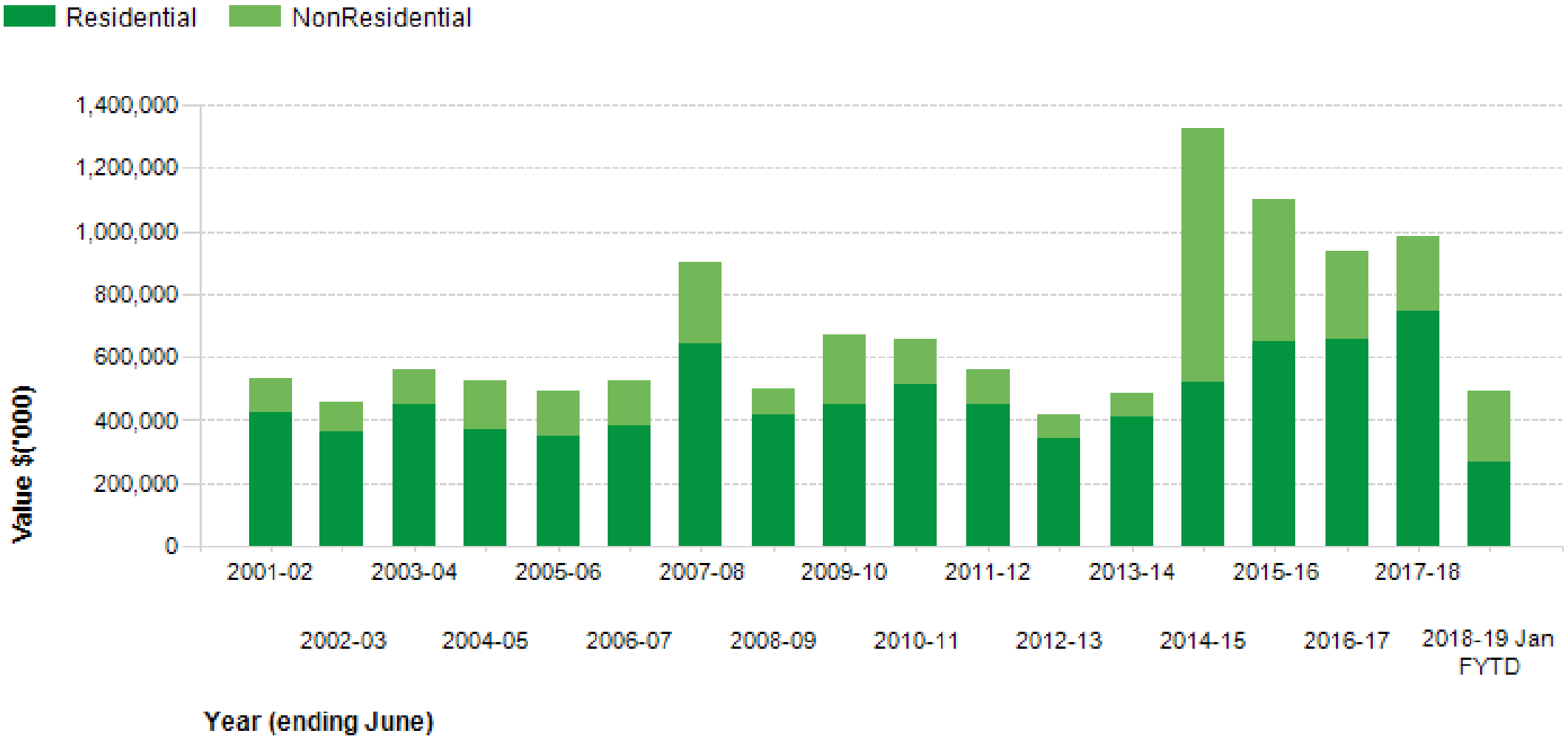
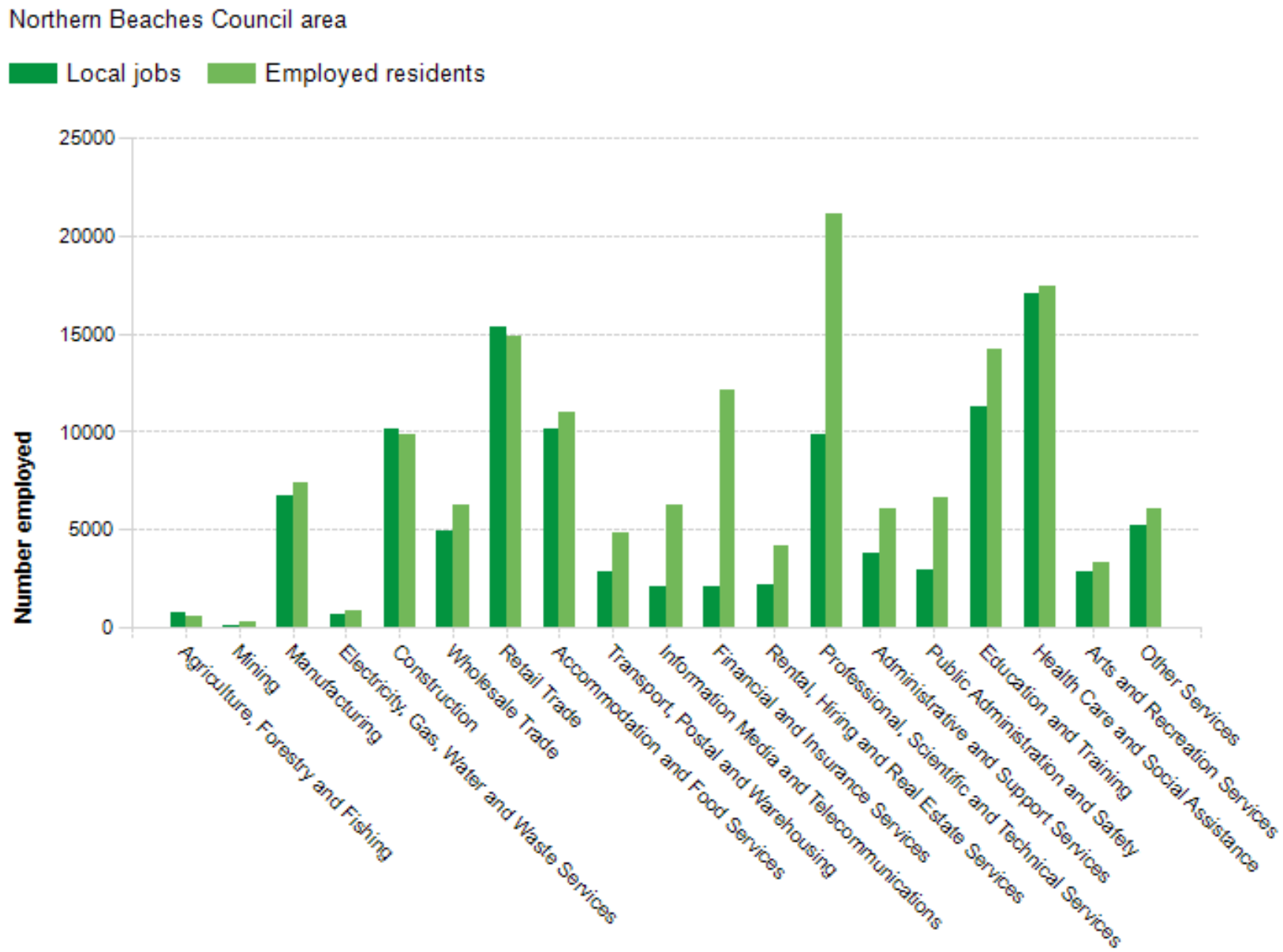
Value of total building approvals

Northern Beaches Council area

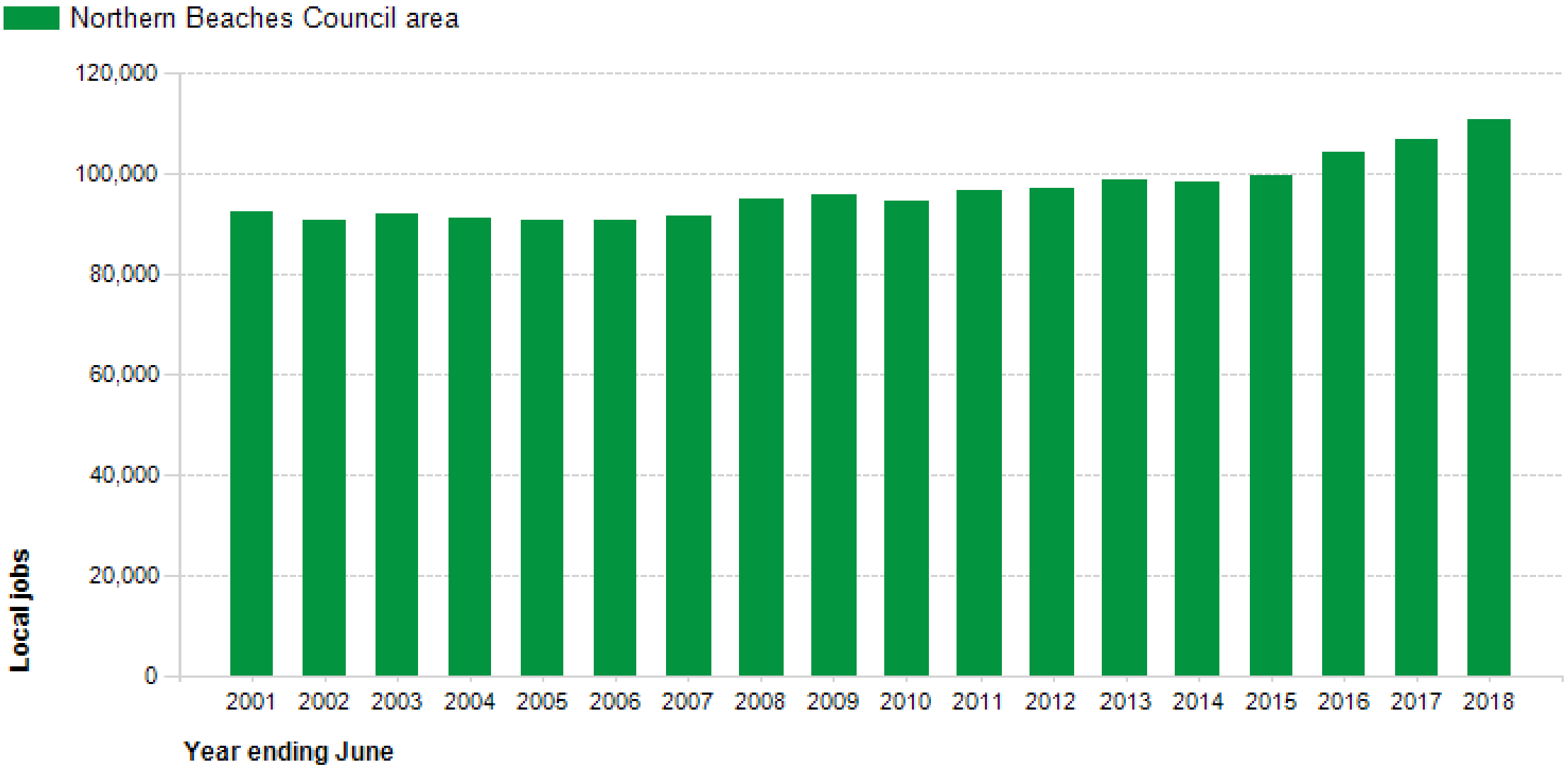


Source: Australian Bureau of Statistics, Building Approvals, Australia, catalogue number 8731.0. Compiled and presented in economy.id by .id the population experts

Employment capacity by industry 2017/18

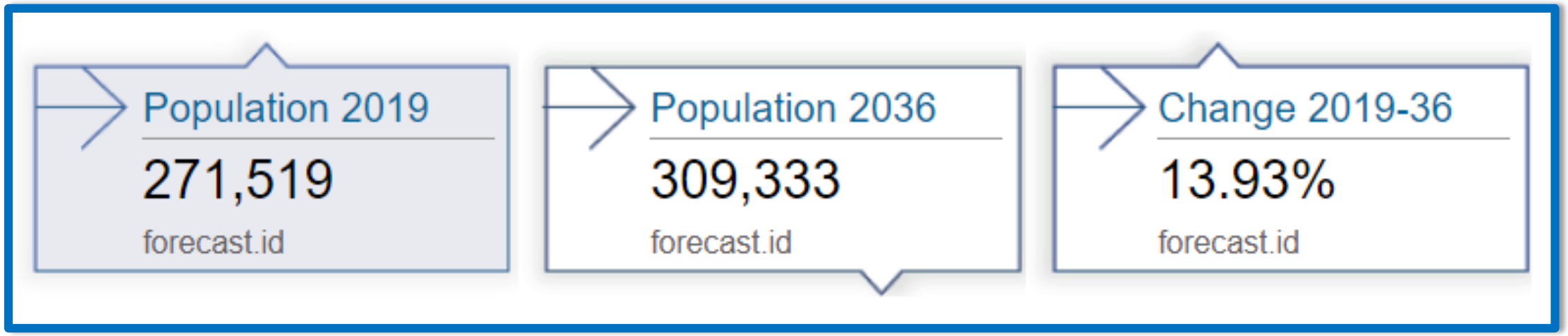


Local jobs



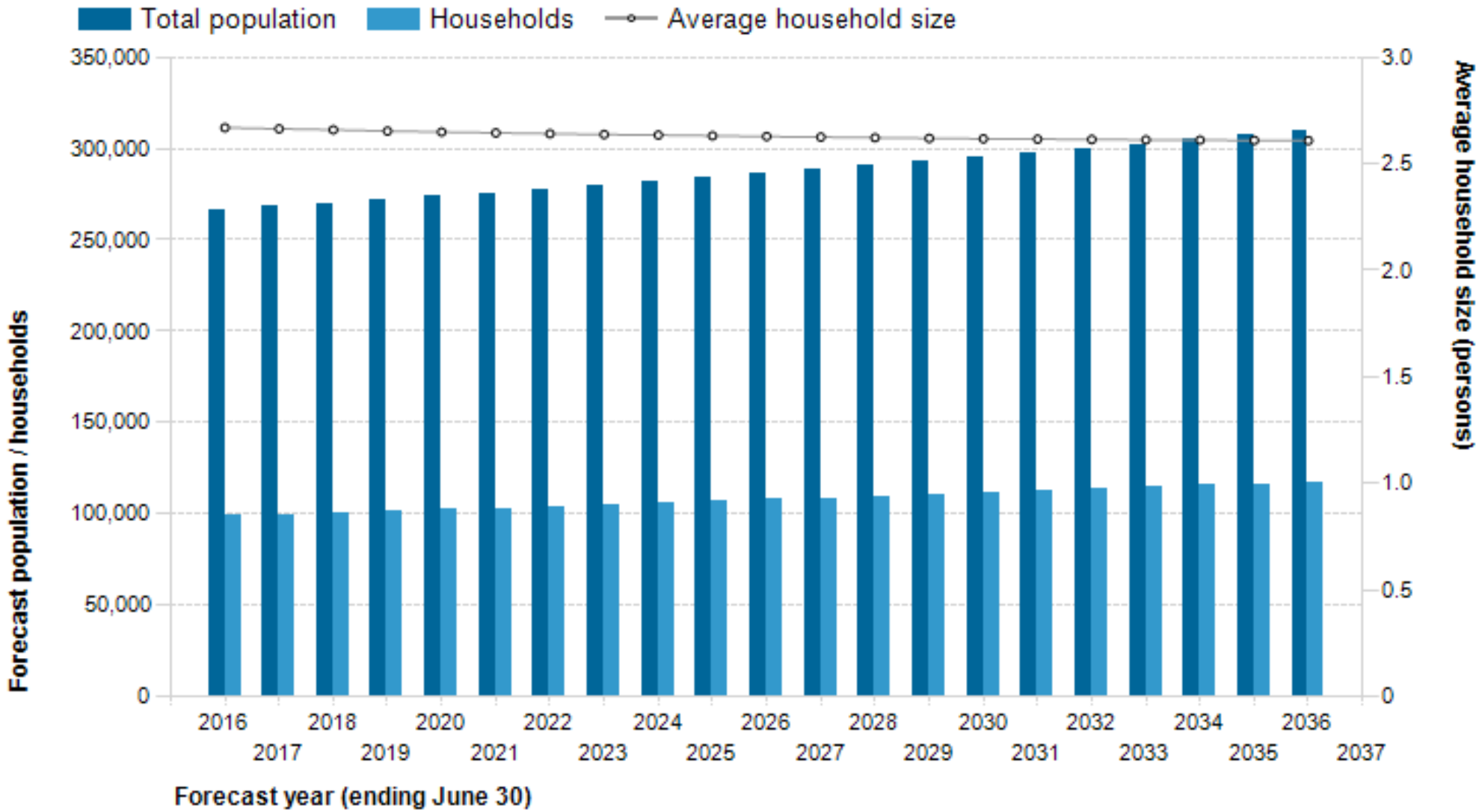
Source: National Institute of Economic and Industry Research (NIEIR) ©2018
Compiled and presented in economy.id by .id the population experts

Northern Beaches Council area population forecasts



Forecast population, households and average household size

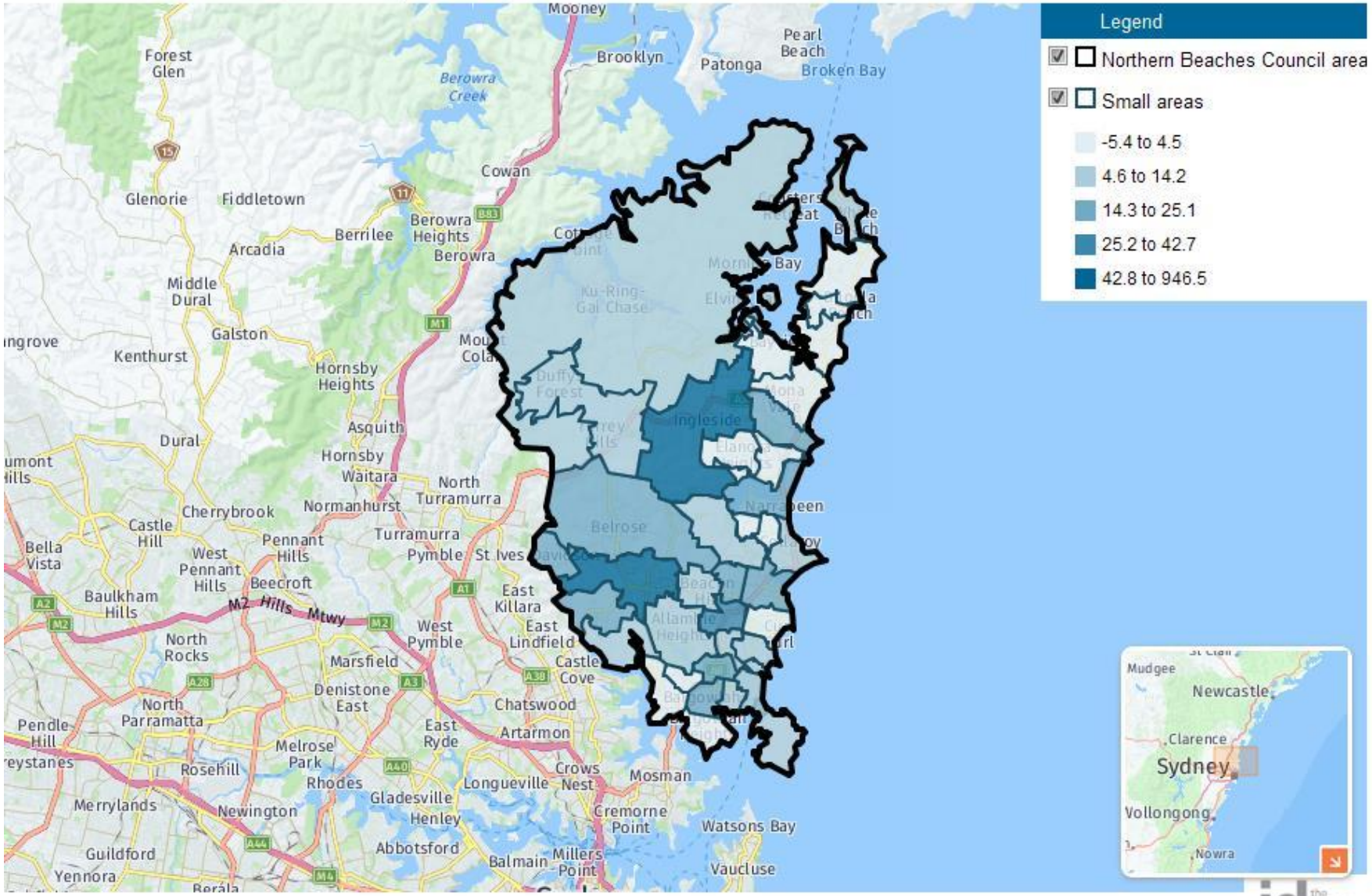
Northern Beaches Council area



Population and household forecasts, 2016 to 2036, prepared by .id the population experts, November 2017.

Population and age structure map - 0 to 85

Northern Beaches Council area, 2016 to 2036 percent change



Source: Population and household forecasts, 2016 to 2036, prepared by .id, the population experts, November 2017.

- base year population by age
- base year population by gender
- fertility rates
- death rates
- migration rates

inputs

cohort component model

- household relationship by five year age group and sex
- household type by size
- average number of children per one and two parent family

inputs

household propensity model

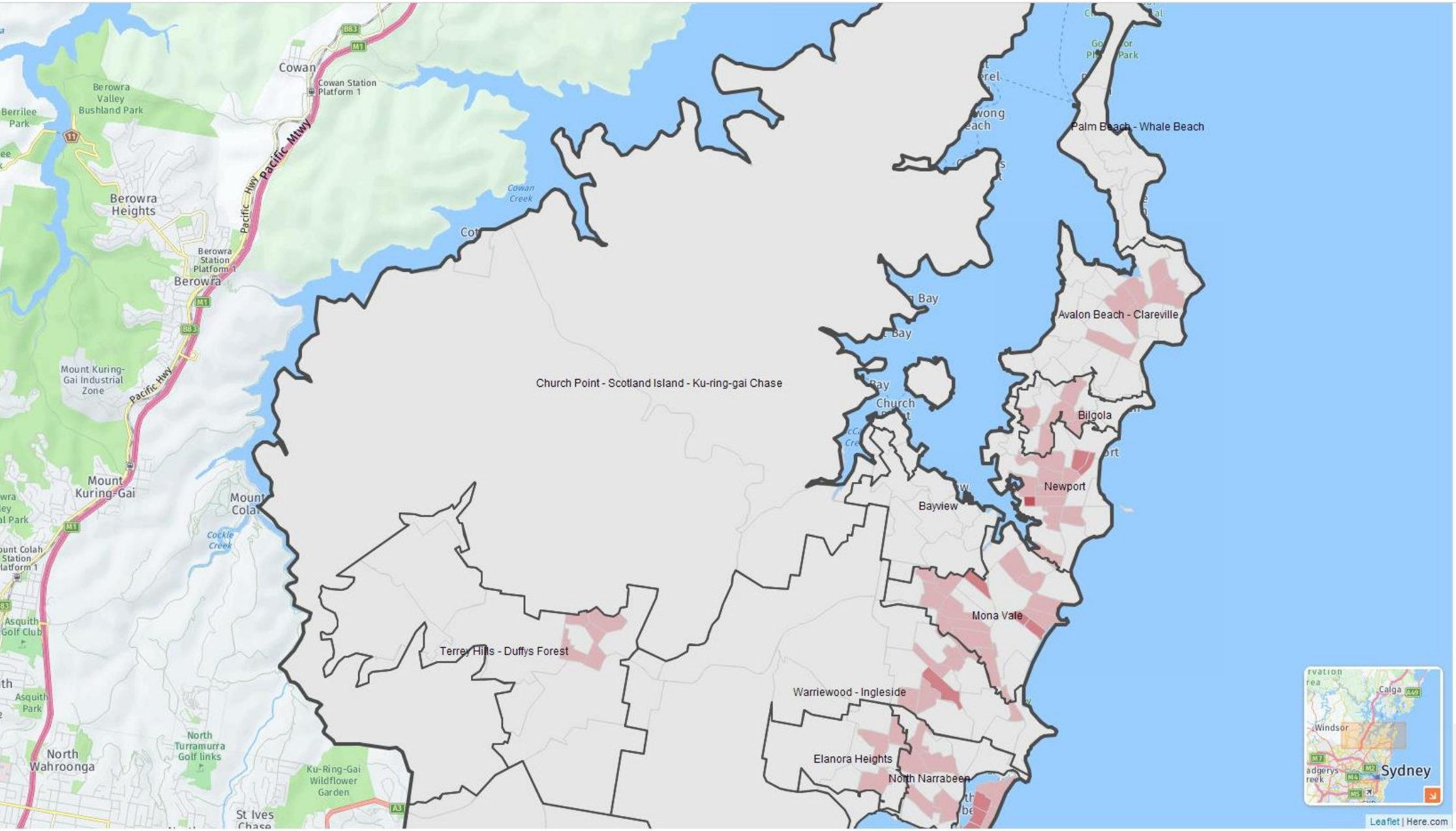
- base year dwellings & households
- residential building activity & demolitions
- base year population in non-private & private dwellings

inputs

housing unit model

outputs

forecast population and households



SA1

Suburbs

Northern Beaches Council area

- 0.01 to 24.80 people
- 24.81 to 50.58 people
- 50.59 to 91.97 people
- 91.98 to 141.24 people
- 141.25 to 220.13 people

Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Usual residence data). Compiled and presented in atlas.id by .id, the population experts. Note: Due to changes in the ABS rules regarding perturbation of small numbers to protect the confidentiality of individuals in 2016, the totals of all SA1s in an area may not equal the total derived from the area as a whole.

powered by .id the population experts

Palm Beach - Whale Beach
Avalon Beach - Clareville
Bilgola
Newport
Bayview
Church
Bay
SA1
Suburbs
Northern Beaches Council area
0.01 to 24.80 people
24.81 to 50.58 people
50.59 to 91.97 people
91.98 to 141.24 people
141.25 to 220.13 people

Avalon Beach – Clareville
Population highlights

Population

11,160

ERP, 2018

▲ Grown by 15 from the previous year.

Median age

45 ▲ (2)

Northern Beaches Council area	40 ▲
Greater Sydney	36 ◂▸
New South Wales	38 ◂▸

Older couples without children

15% ▲ (3.4%)

Northern Beaches Council area	10% ▲
Greater Sydney	8% ▲
New South Wales	10% ▲

Lone person households

18% ◂▸ (0%)

Northern Beaches Council area	21% ▼
Greater Sydney	20% ▼
New South Wales	22% ▼

Medium and high density Housing

18% ▲ (0.5%)

Northern Beaches Council area	43% ▲
Greater Sydney	44% ▲
New South Wales	33% ▲

Median weekly household income

$2,171 ▲ ($346)

Northern Beaches Council area	$2,173 ▲
Greater Sydney	$1,745 ▲
New South Wales	$1,481 ▲

Median weekly mortgage repayment

$692

Northern Beaches Council area	$655 ▲
Greater Sydney	$495 ▲
New South Wales	$456 ▲

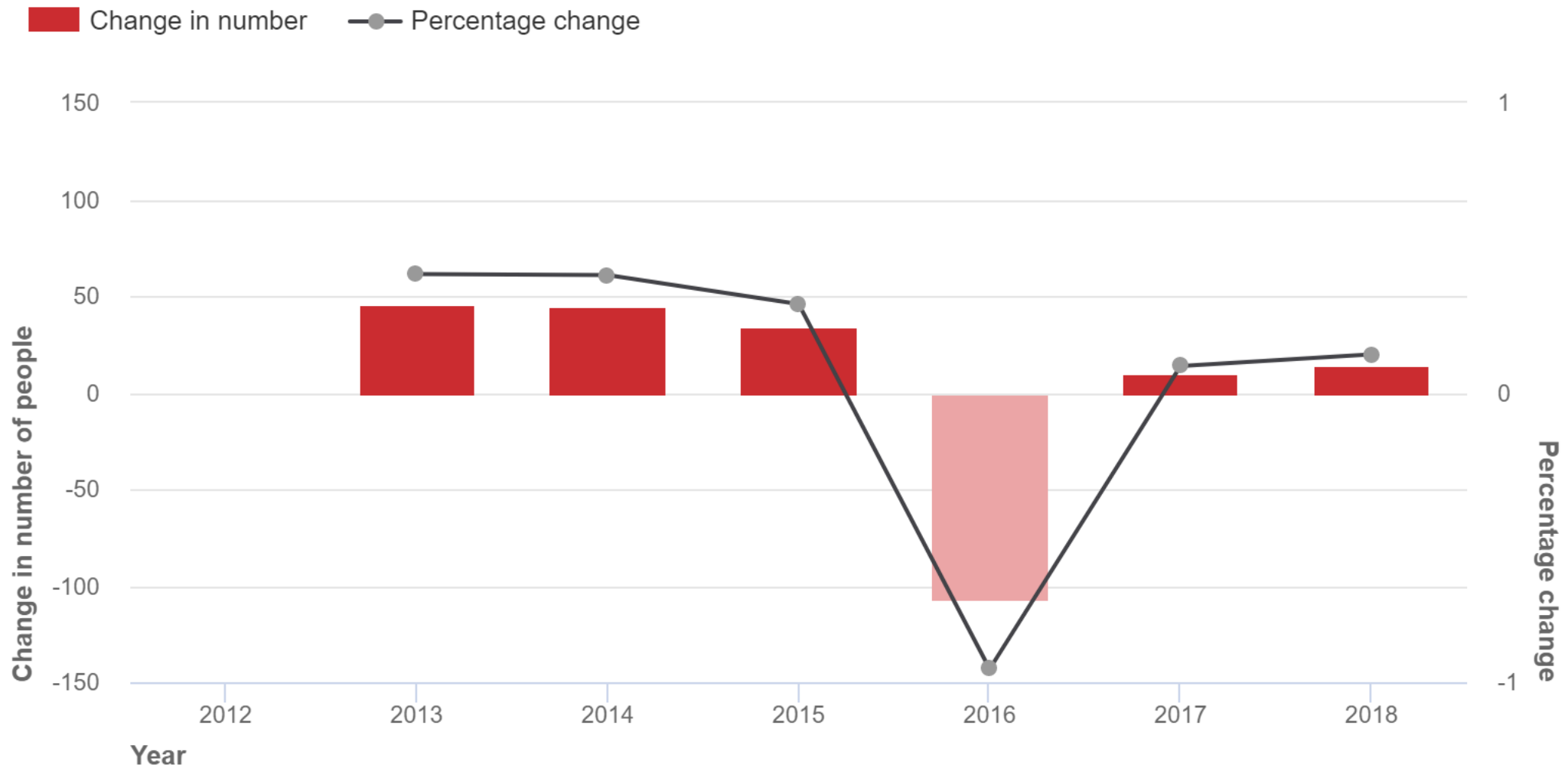
Median weekly rent

$682

Northern Beaches Council area	$576 ▲
Greater Sydney	$447 ▲
New South Wales	$384 ▲

Annual change in Estimated Resident Population (ERP)

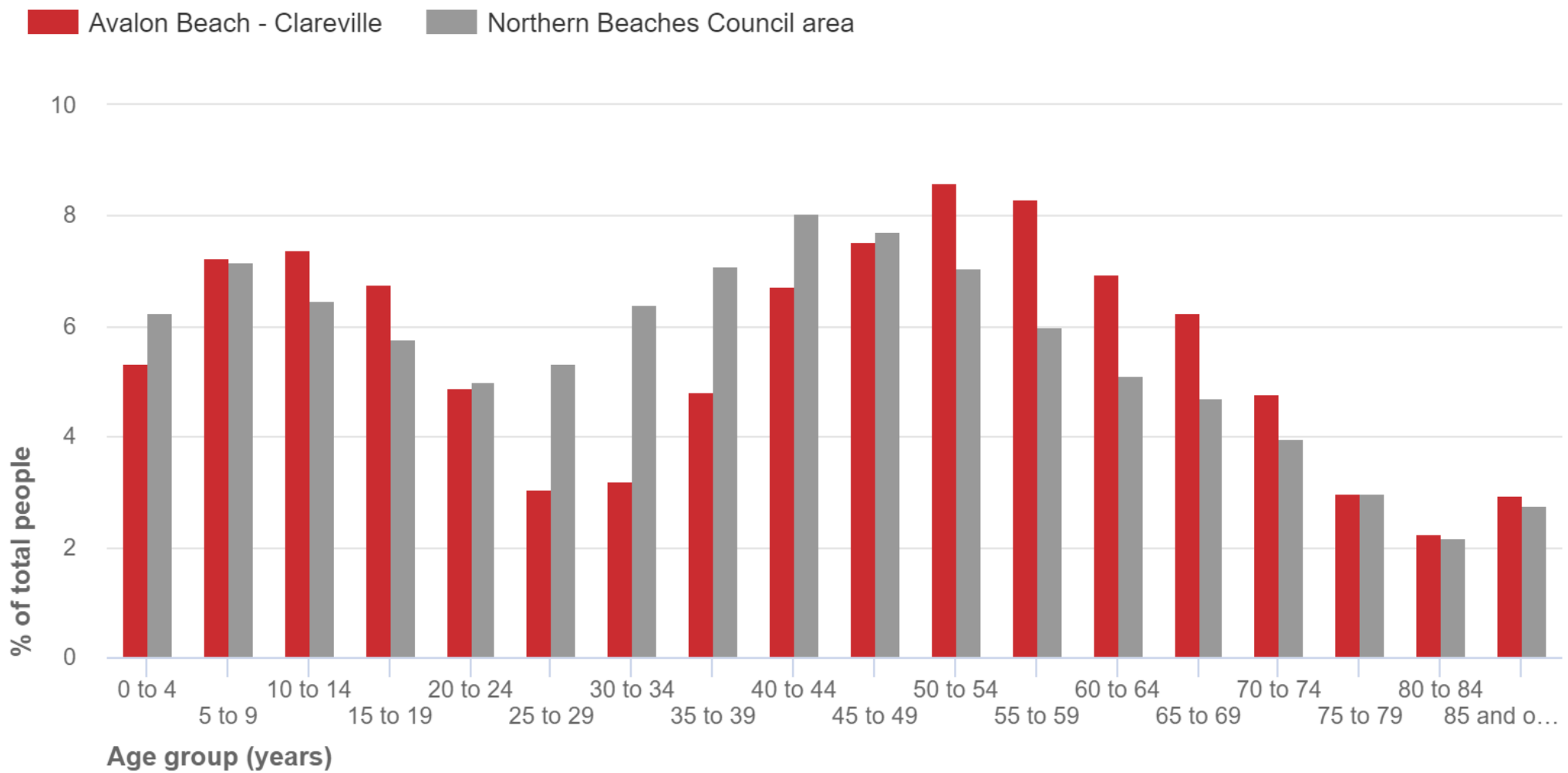
Avalon Beach - Clareville



Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0). Compiled and presented by .id the population experts

Age structure - five year age groups, 2016

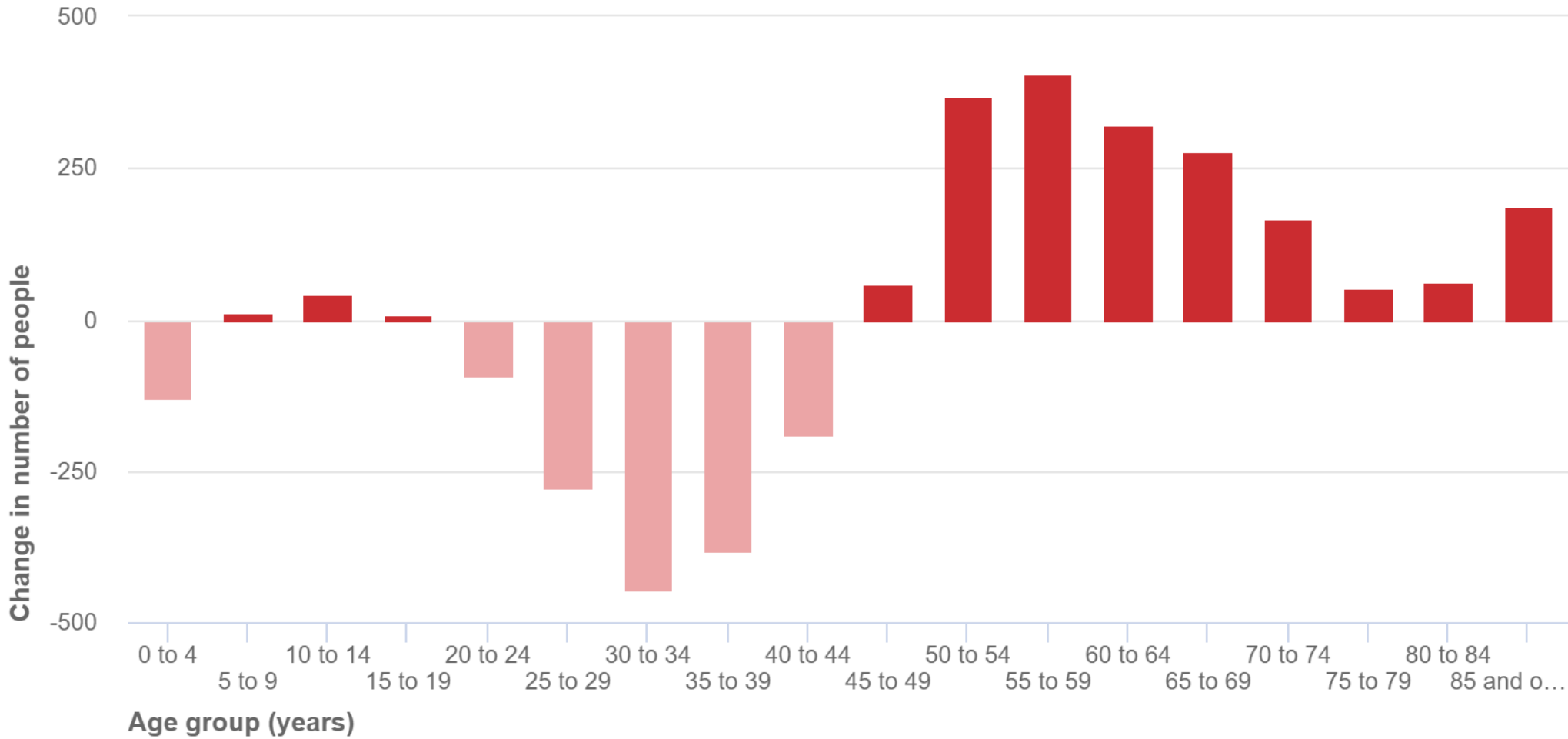
Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Enumerated data). Compiled and presented in profile.id by .id, the population experts.

Change in age structure - five year age groups, 1991 to 2016

Avalon Beach - Clareville - Total persons



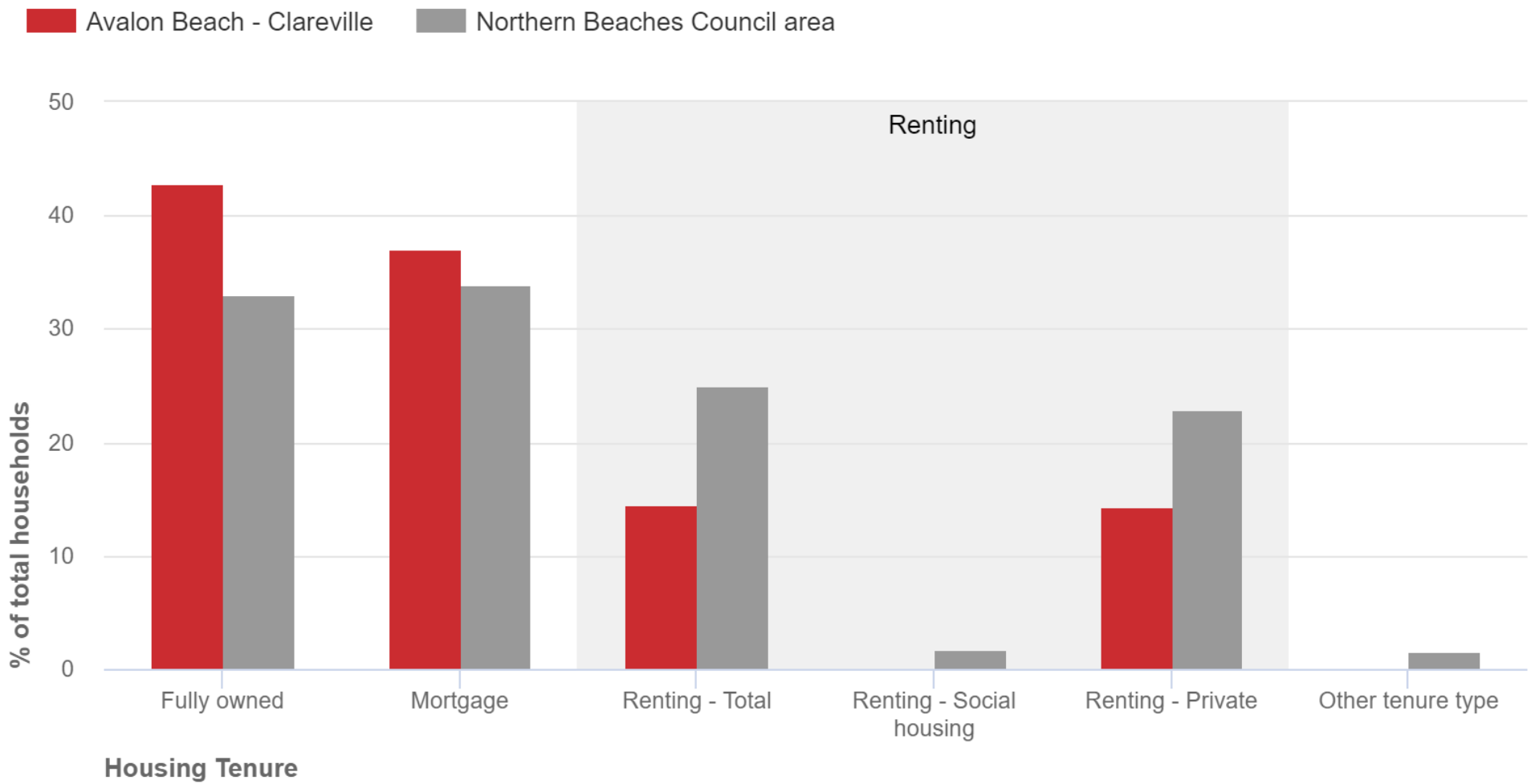
Source: Australian Bureau of Statistics, Census of Population and Housing, 1991 and 2016 (Enumerated data). Compiled and presented in profile.id by .id, the population experts.

Change in number of bedrooms per dwelling, 2011 to 2016

Avalon Beach - Clareville

Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Enumerated data). Compiled and presented in profile.id by .id, the population experts.

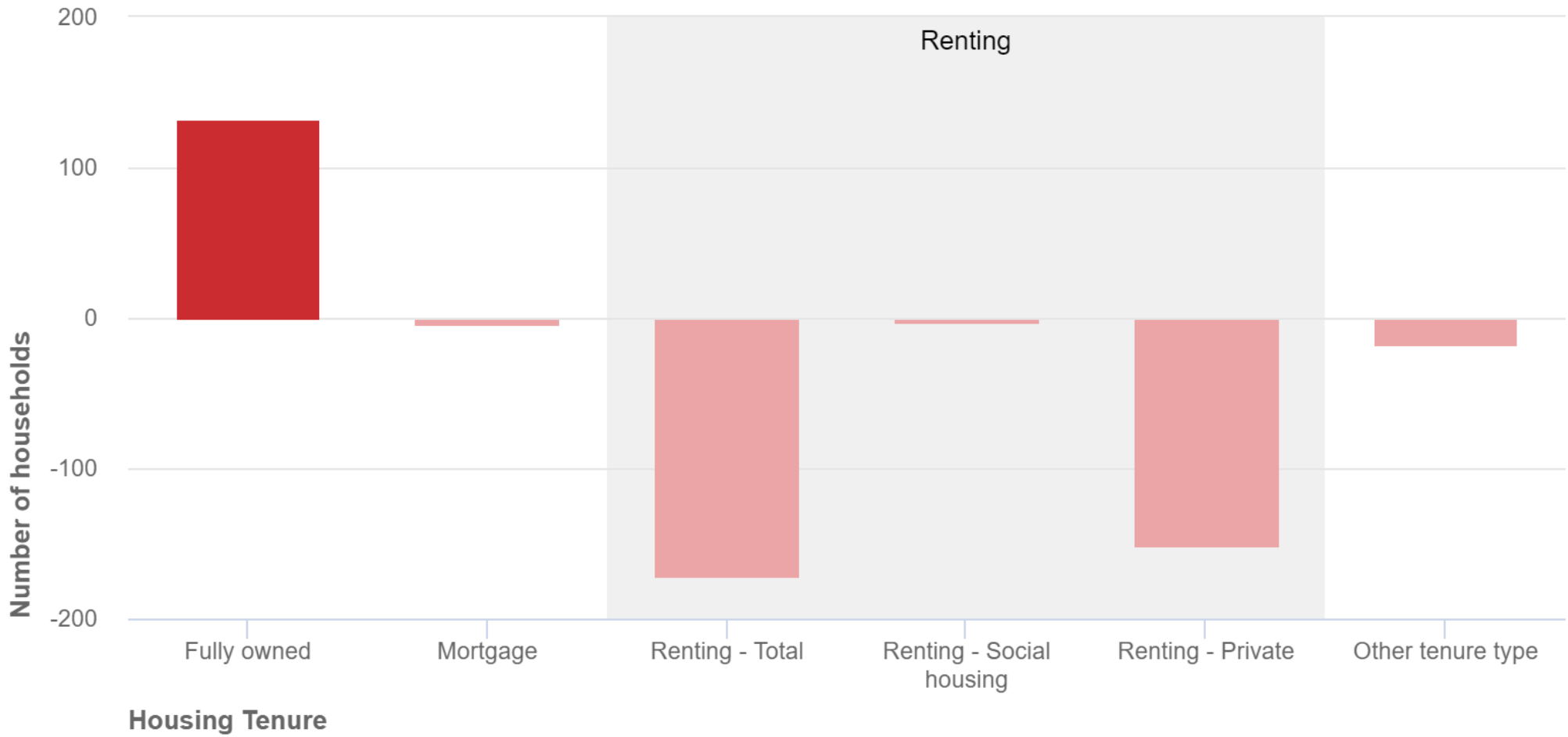
Housing tenure, 2016



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Enumerated data). Compiled and presented in profile.id by .id, the population experts.

Change in housing tenure, 2011 to 2016

Avalon Beach - Clareville



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Enumerated data). Compiled and presented in profile.id by .id, the population experts.

Future assumptions:

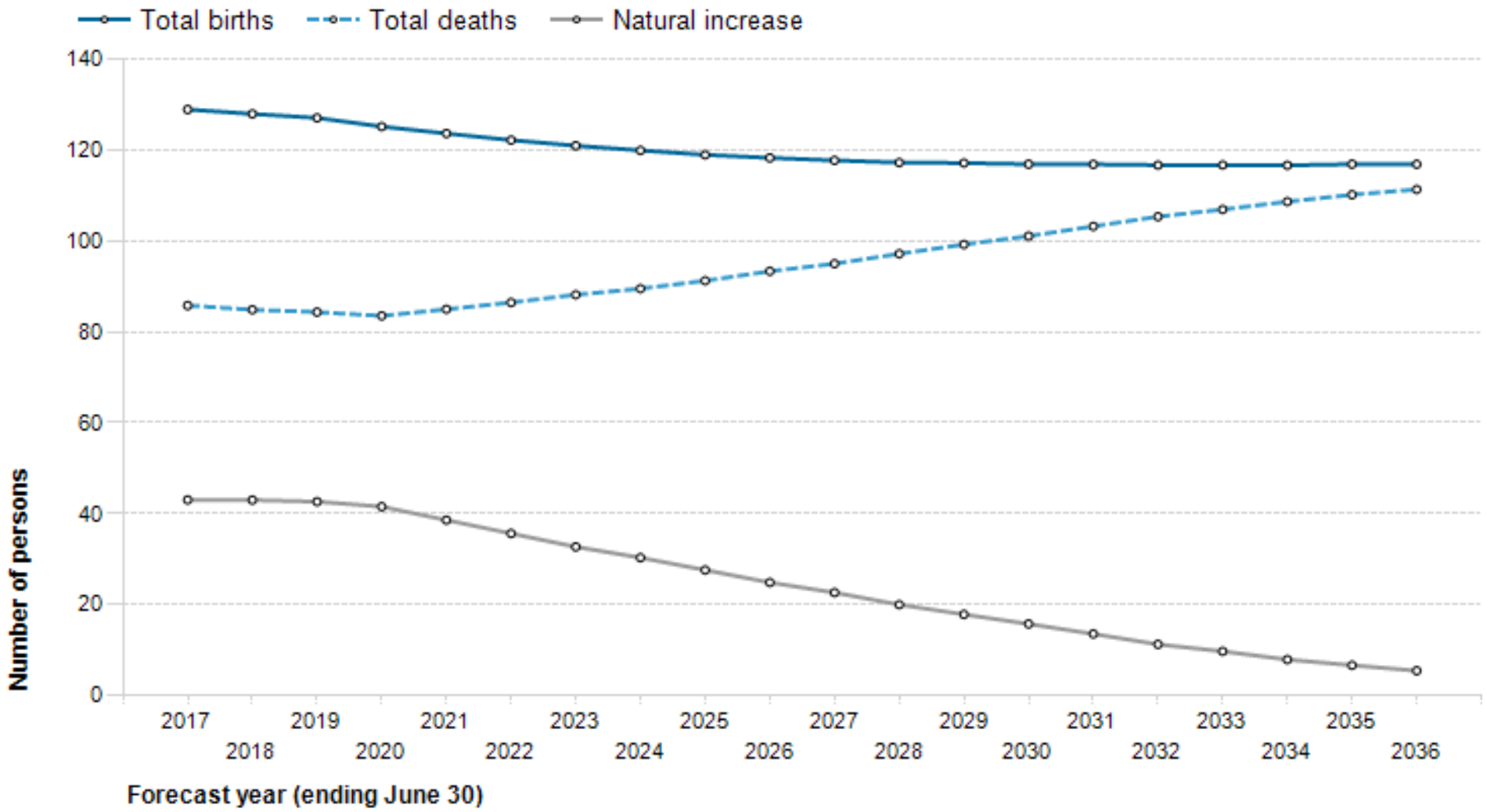
- Low to moderate level of infill development (4-11 dwellings per annum)

- No change in Non-private dwellings

- Some attraction of families (0-9 and 30-44 years)
- Large loss of young adults (18-29 years), mostly home leavers accessing affordable housing, employment and education opportunities elsewhere
- Small loss of empty-nesters (65-74 years)

Forecast births, deaths and natural increase/decrease

Avalon Beach - Clareville



Population and household forecasts, 2016 to 2036, prepared by .id the population experts, November 2017.

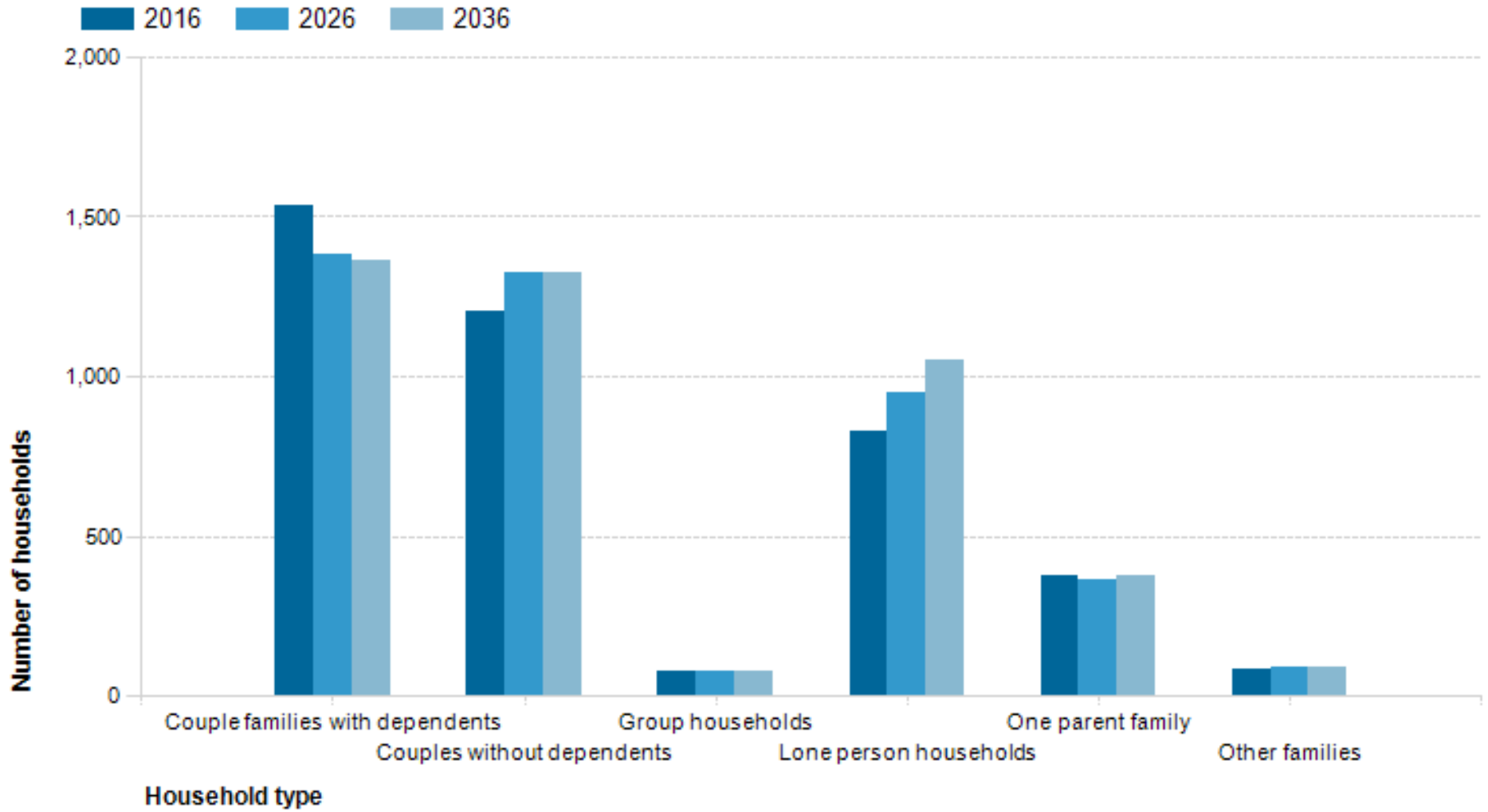
Forecast population, households and dwellings

Avalon Beach - Clareville

Summary	Forecast year				
	2016	2021	2026	2031	2036
Population	**11,284**	**11,142**	**11,052**	**11,057**	**11,120**
Change in population (5yrs)	--	-142	-90	5	64
Average annual change	--	-0.25%	-0.16%	0.01%	0.12%
Households	4,104	4,146	4,188	4,233	4,278
Average household size	2.72	2.66	2.61	2.58	2.57
Population in non private dwellings	127	127	127	127	127
Dwellings	4,286	4,321	4,363	4,410	4,457
Dwelling occupancy rate	95.75	95.95	95.99	95.99	95.98

Forecast household types

Avalon Beach - Clareville



Population and household forecasts, 2016 to 2036, prepared by .id the population experts, November 2017.

Palm Beach - Whale Beach
Population highlights

Population

2,096

ERP, 2018

▲ Grown by 18 from the previous year.

Median age

55 ▲ (3)

Northern Beaches Council area	40 ▲
Greater Sydney	36 ◂▸
New South Wales	38 ◂▸

Trade qualification (certificate)

14% ▲ (2.3%)

Northern Beaches Council area	16% ◂▸
Greater Sydney	15% ◂▸
New South Wales	18% ◂▸

Unemployment rate

4.3% ◂▸ (0.2%)

Northern Beaches Council area	3.5% ▲
Greater Sydney	6.0% ◂▸
New South Wales	6.3% ◂▸

Participation rate (population in labour force)

55% ▼ (-1.4%)

Northern Beaches Council area	66% ◂▸
Greater Sydney	62% ◂▸
New South Wales	59% ▼

Older couples without children

21% ▲ (3%)

Northern Beaches Council area	10% ▲
Greater Sydney	8% ▲
New South Wales	10% ▲

Couples with children

22% ▼ (-1.4%)

Northern Beaches Council area	37% ▲
Greater Sydney	35% ▲
New South Wales	32% ◂▸

Medium and high density Housing

7% ▼ (-22.7%)

Northern Beaches Council area	43% ▲
Greater Sydney	44% ▲
New South Wales	33% ▲

Median weekly household income

$2,168 ▲ ($431)

Northern Beaches Council area	$2,173 ▲
Greater Sydney	$1,745 ▲
New South Wales	$1,481 ▲

Median weekly mortgage repayment

$821

Northern Beaches Council area	$655 ▲
Greater Sydney	$495 ▲
New South Wales	$456 ▲

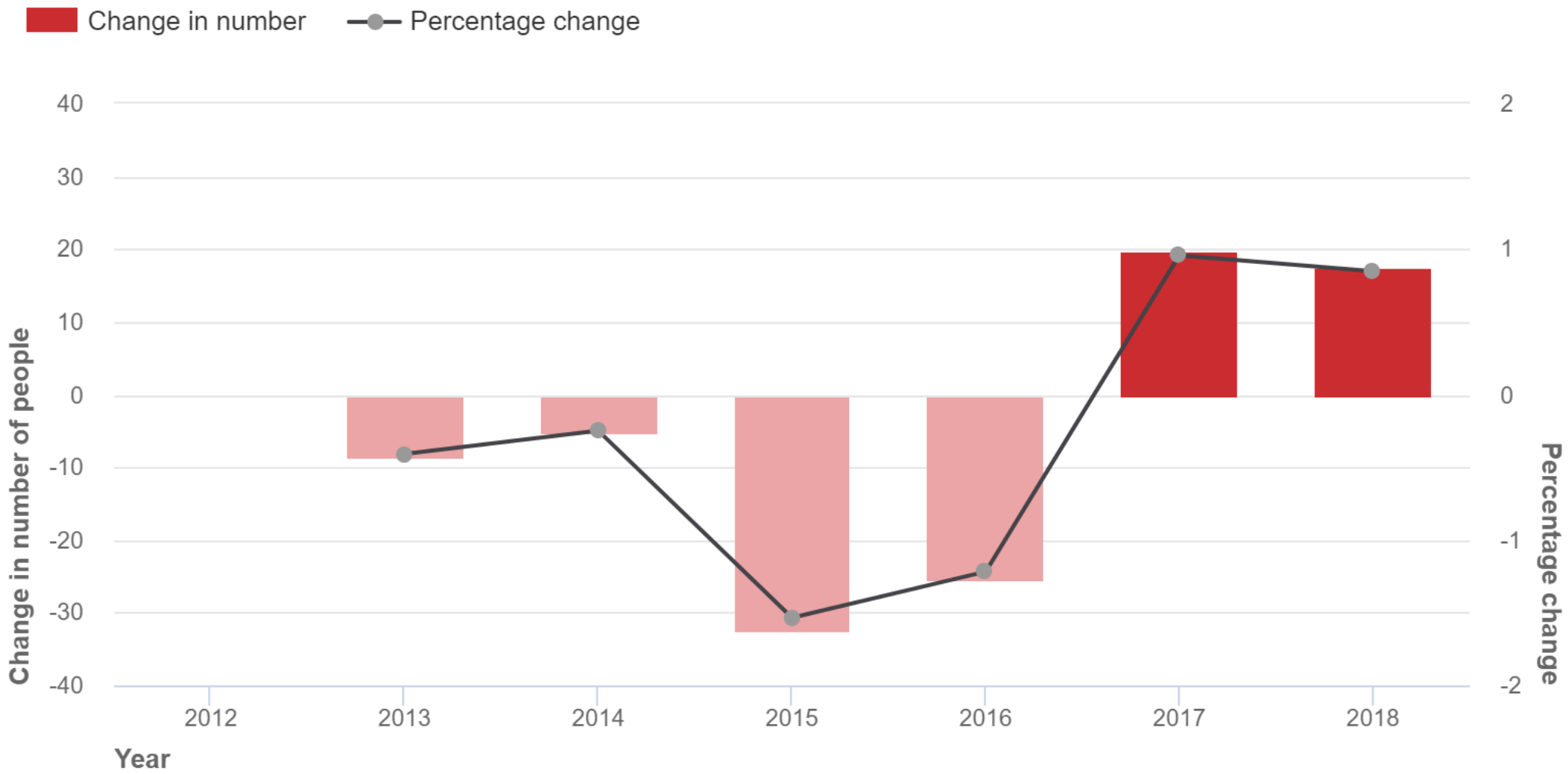
Median weekly rent

$732

Northern Beaches Council area	$576 ▲
Greater Sydney	$447 ▲
New South Wales	$384 ▲

Annual change in Estimated Resident Population (ERP)

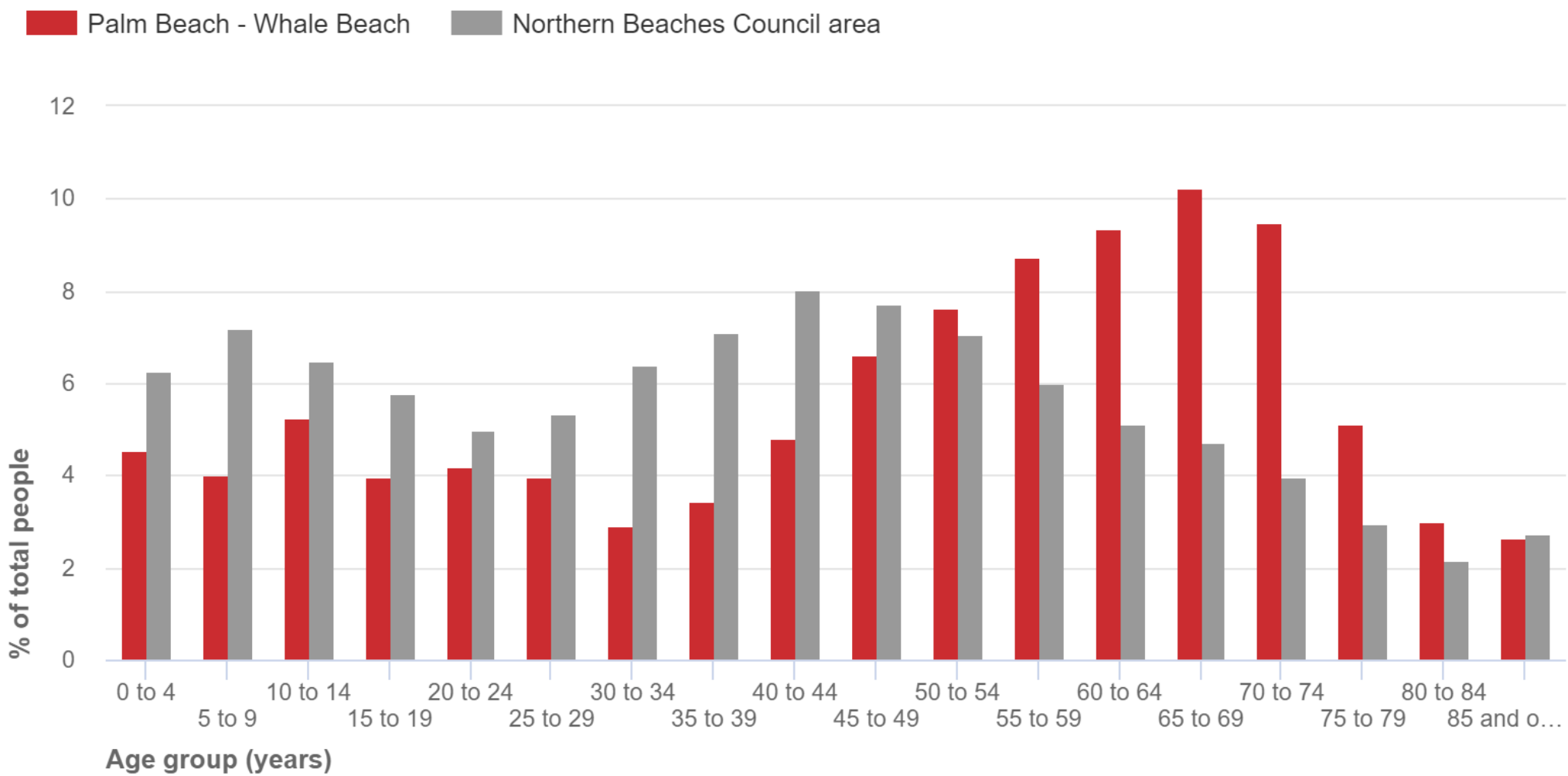
Palm Beach - Whale Beach



Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0). Compiled and presented by .id the population experts

Age structure - five year age groups, 2016

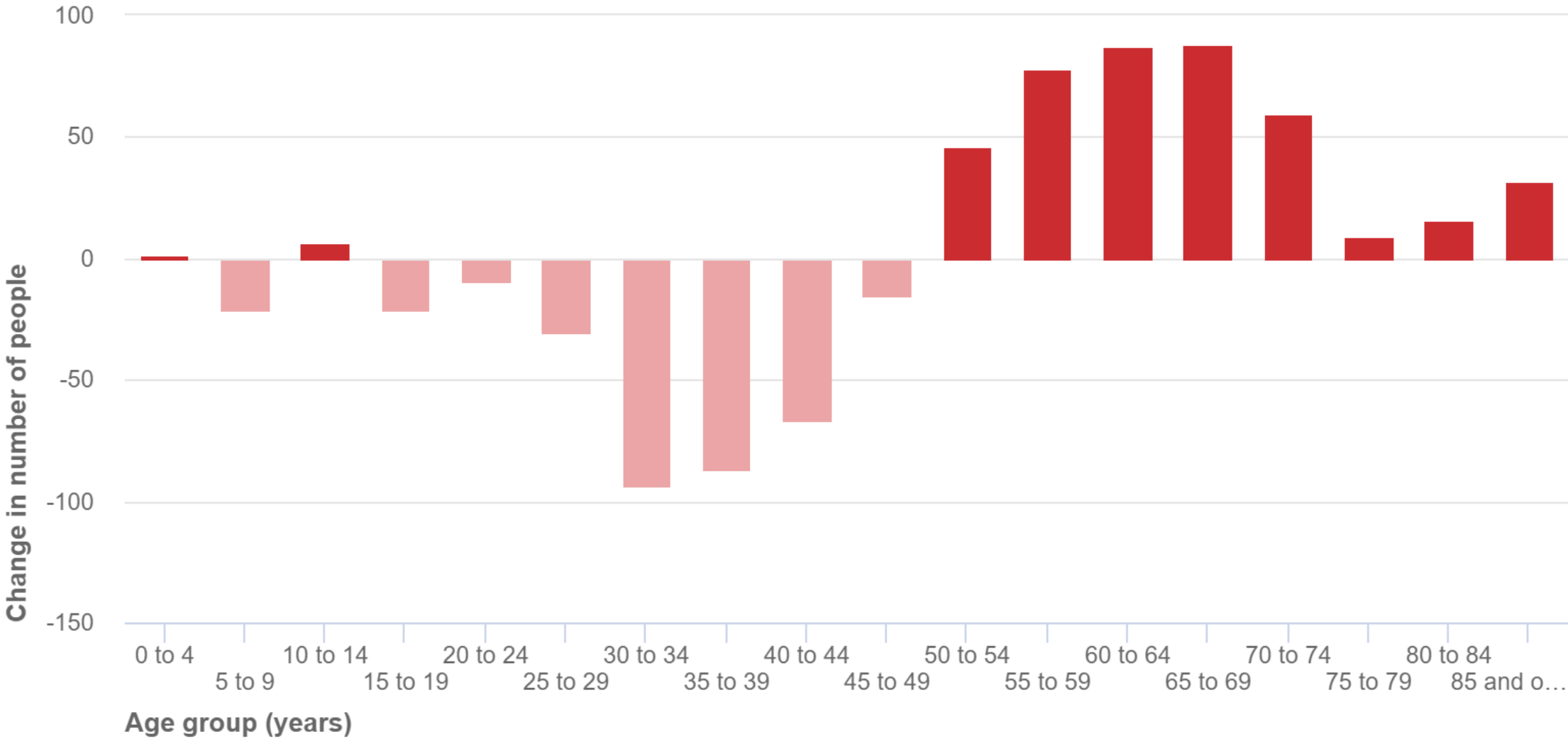
Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Enumerated data). Compiled and presented in profile.id by .id, the population experts.

Change in age structure - five year age groups, 1991 to 2016

Palm Beach - Whale Beach - Total persons



Source: Australian Bureau of Statistics, Census of Population and Housing, 1991 and 2016 (Enumerated data). Compiled and presented in profile.id by .id, the population experts.

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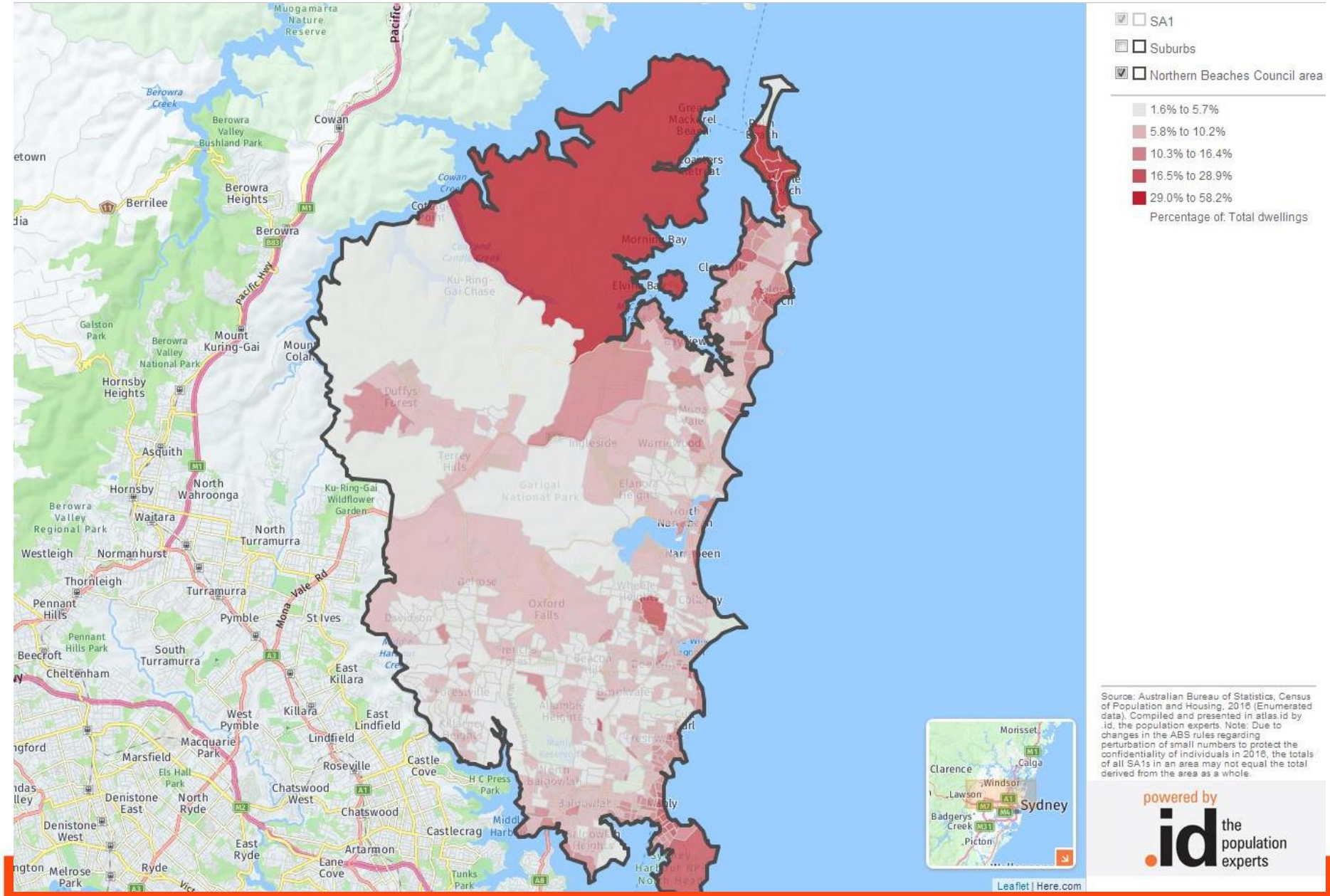
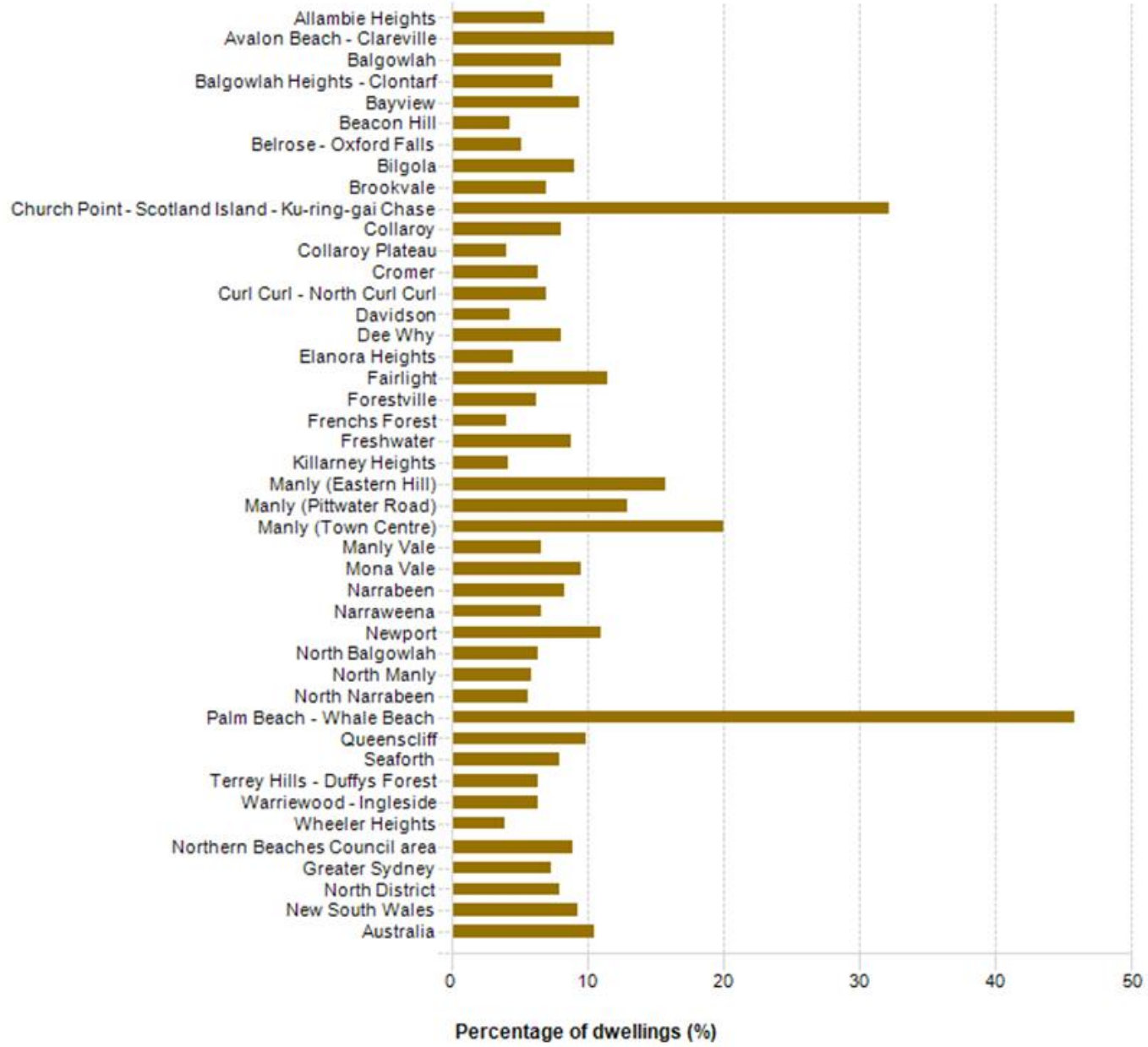
Northern Beaches Council, Vacant dwellings, 2016, Enumerated



Vacant dwellings, 2016



Future assumptions:

- No development sites identified
- Very low level of infill development (0-3 dwellings per annum)

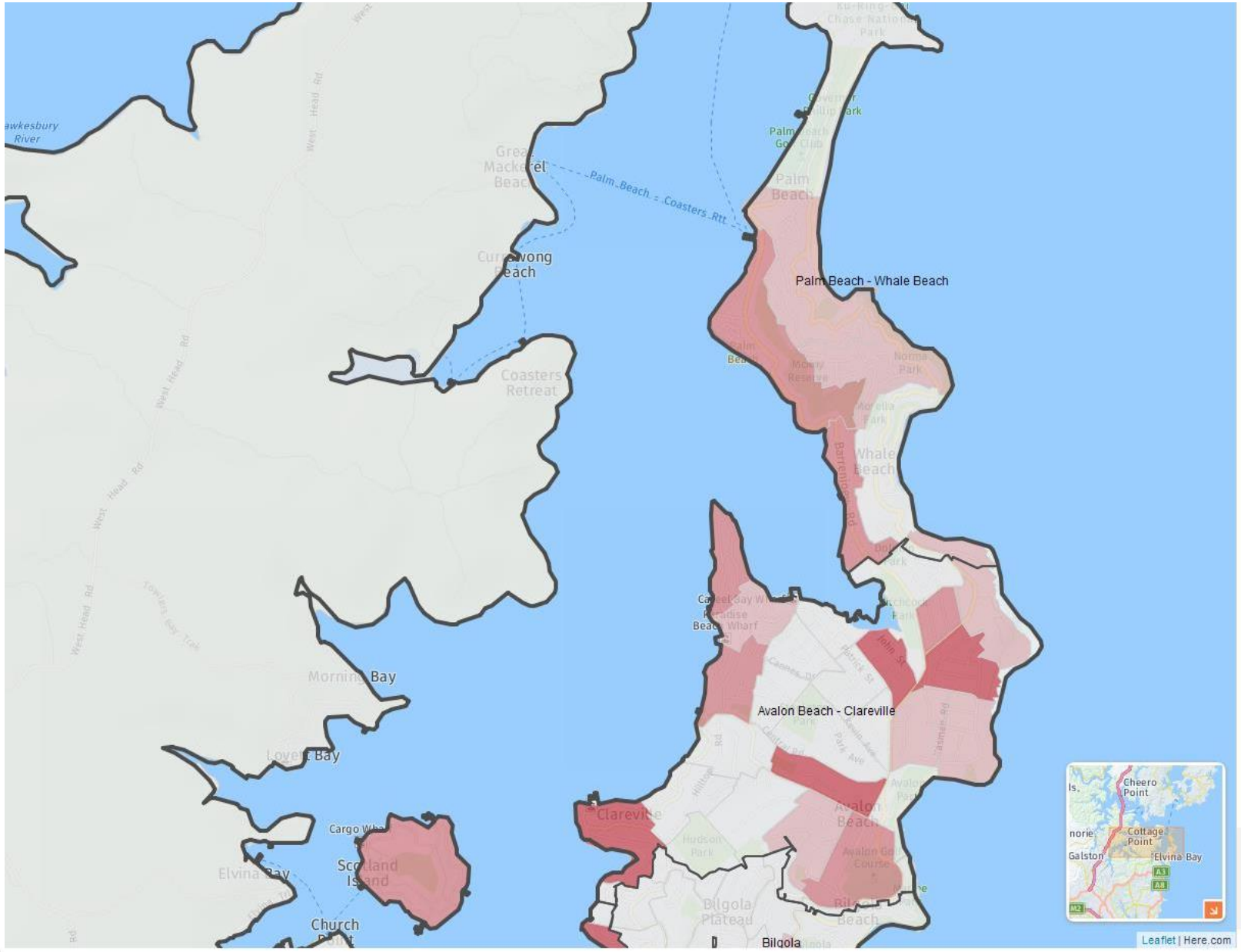
- No change in Non-private dwellings

- Some attraction of families (0-9 and 30-44 years)
- Gain of older adults and empty nesters (30-44 and 50-64 years)
- Loss in older persons (70+ years)

Forecast population, households and dwellings

Palm Beach - Whale Beach	Forecast year				
Summary	**2016**	**2021**	**2026**	**2031**	**2036**
Population	2,062	2,099	2,154	2,198	2,230
Change in population (5yrs)	--	37	55	44	32
Average annual change	--	0.35%	0.52%	0.40%	0.29%
Households	950	955	959	964	967
Average household size	2.16	2.19	2.24	2.27	2.30
Population in non private dwellings	9	9	9	9	9
Dwellings	1,464	1,472	1,479	1,486	1,489
Dwelling occupancy rate	64.89	64.88	64.84	64.87	64.94

Northern Beaches Council, Rental stress, 2016, Enumerated



SA1
Suburbs
Northern Beaches Council area

2.5% to 10.3%
10.4% to 17.1%
17.2% to 24.9%
25.0% to 36.7%
36.8% to 59.2%
Percentage of: Total rented households

Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Enumerated data). Compiled and presented in atlas.id by .id, the population experts. Note: Due to changes in the ABS rules regarding perturbation of small numbers to protect the confidentiality of individuals in 2016, the totals of all SA1s in an area may not equal the total derived from the area as a whole.

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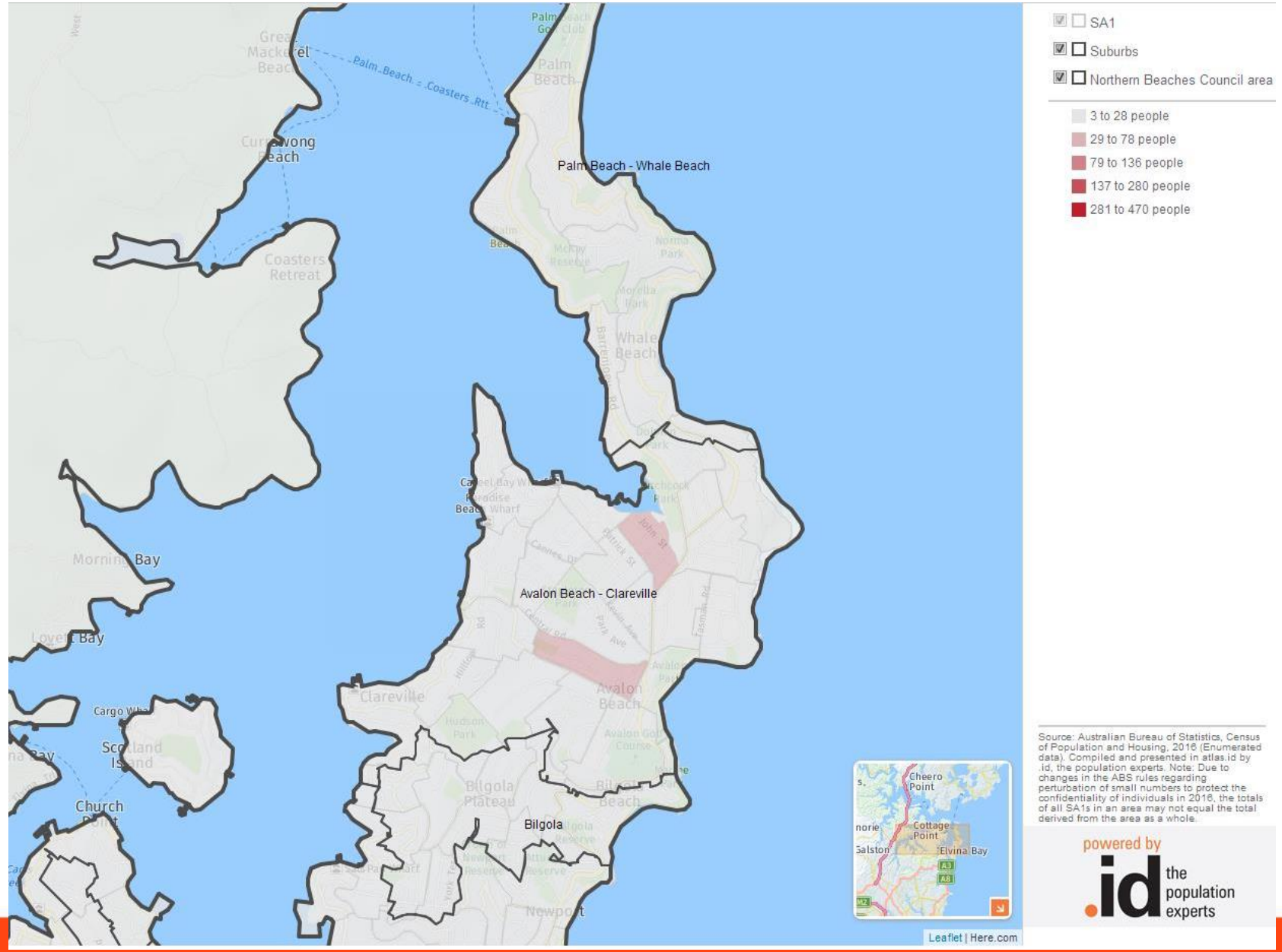
Northern Beaches Council, People in non-private dwellings, 2016, Enumerated, Number



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Enumerated data). Compiled and presented in atlas.id by .id, the population experts. Note: Due to changes in the ABS rules regarding perturbation of small numbers to protect the confidentiality of individuals in 2016, the totals of all SA1s in an area may not equal the total derived from the area as a whole.

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