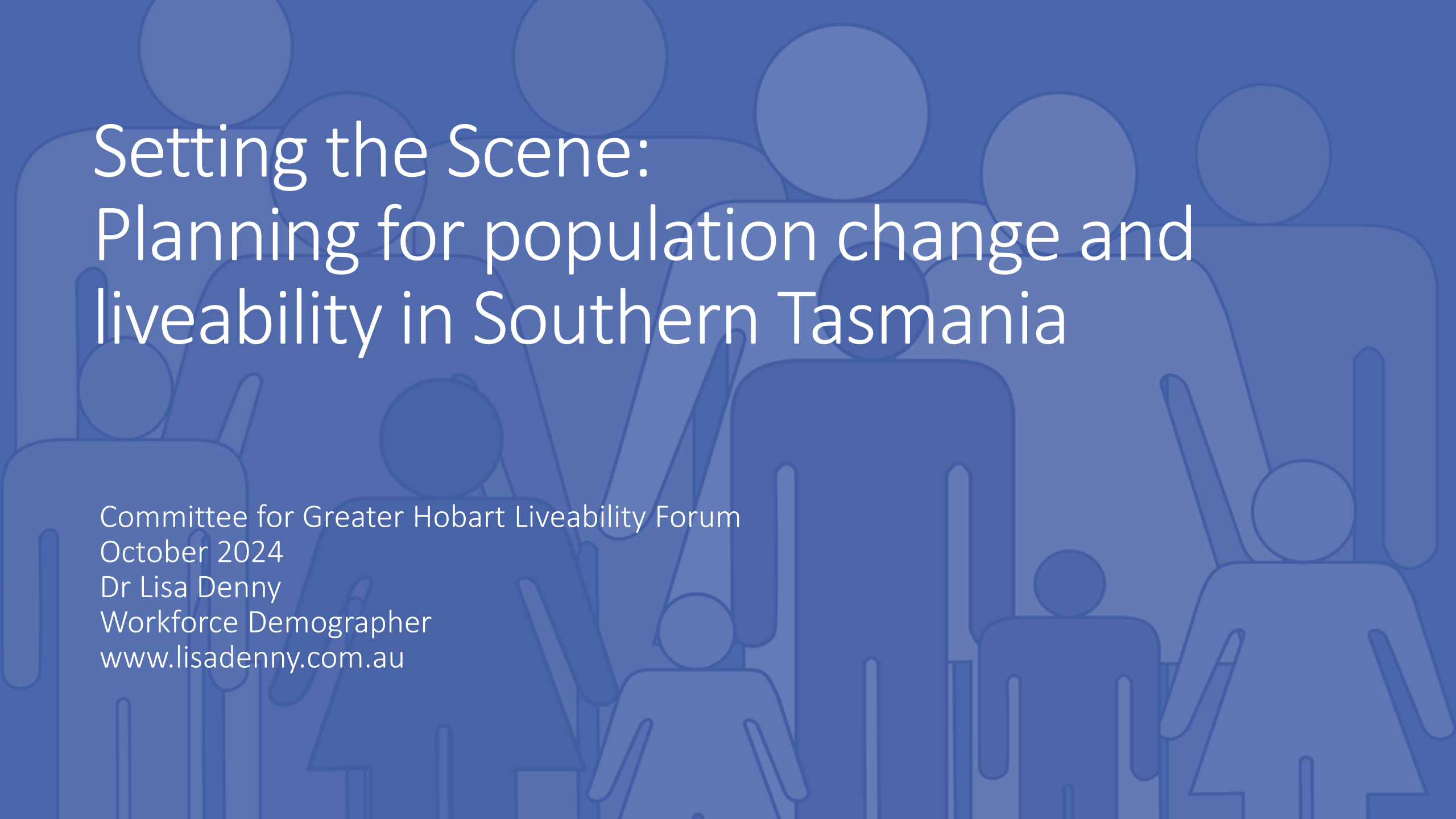
Setting the Scene: Planning for population change and liveability in Southern Tasmania



Committee for Greater Hobart Liveability Forum
October 2024
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Overview

Who are Southern Tasmanians?

Understanding population change

About population projections

Projected age structures

Key messages

Who are Southern Tasmanians?

297,472 people
- More than half the Tasmanian population

50.6% Female

5% identify as Indigenous

76.9% born in Australia

85.6% Australian citizens

Median age for Greater Hobart 38.9
- Doesn't include Tasman or parts of Glamorgan Spring Bay and Huon Valley.

19.9% aged 65 or older
- – cusp of hyper-ageing

1 in 5 did not live in Southern Tasmania five years prior to the 2021 ABS Census
- 5% lived overseas

Households	%
Couple family with no children	27.2
Lone person household	24.7
Couple family with children	24.6
One parent family	11.6
Group household	3.5

Source: ABS, Census for Population and Housing, 2021

Engagement with work

Labour Force Participation (15 years +)

- 36.7% are not in the labour force
- 32.4% work full time
- 23.3% work part time
- 3.8% actively looking for work
- 97.5% work in Southern Tasmania

LGA Place of Work	%
Hobart	41.5
Glenorchy	15.9
Clarence	13.9
Kingborough	7.5
No fixed address	4.5
Huon Valley	3.8
Brighton	2.7
Sorell	2.4
Derwent Valley	2.0
Glamorgan Spring Bay	1.3
Southern Midlands	0.9
Central Highlands	0.6
Elsewhere	2.4

Source: ABS, Census for Population and Housing, 2021

Engagement with education

Highest level of educational attainment

Bachelor degree or higher – 29.6%

Certificate III or IV – 18.2%

Year 10 or higher – 32.7%

Advanced diploma or diploma – 8.8%

71.3% of Southern Tasmanians not enrolled in education or training

Enrolments	Number	%
Pre-school	3,614	5.3
Primary school	23,502	34.5
Secondary school	16,660	24.5
Tertiary – VET	8,656	12.7
Tertiary – University	12,902	19.0
Other	2,732	4.0



Source: ABS, Census for Population and Housing, 2021



Planning for population change

The importance of understanding population age structures and projected change



Drivers of population change

Population change is an aggregated measure of choices made by people.

A function of:

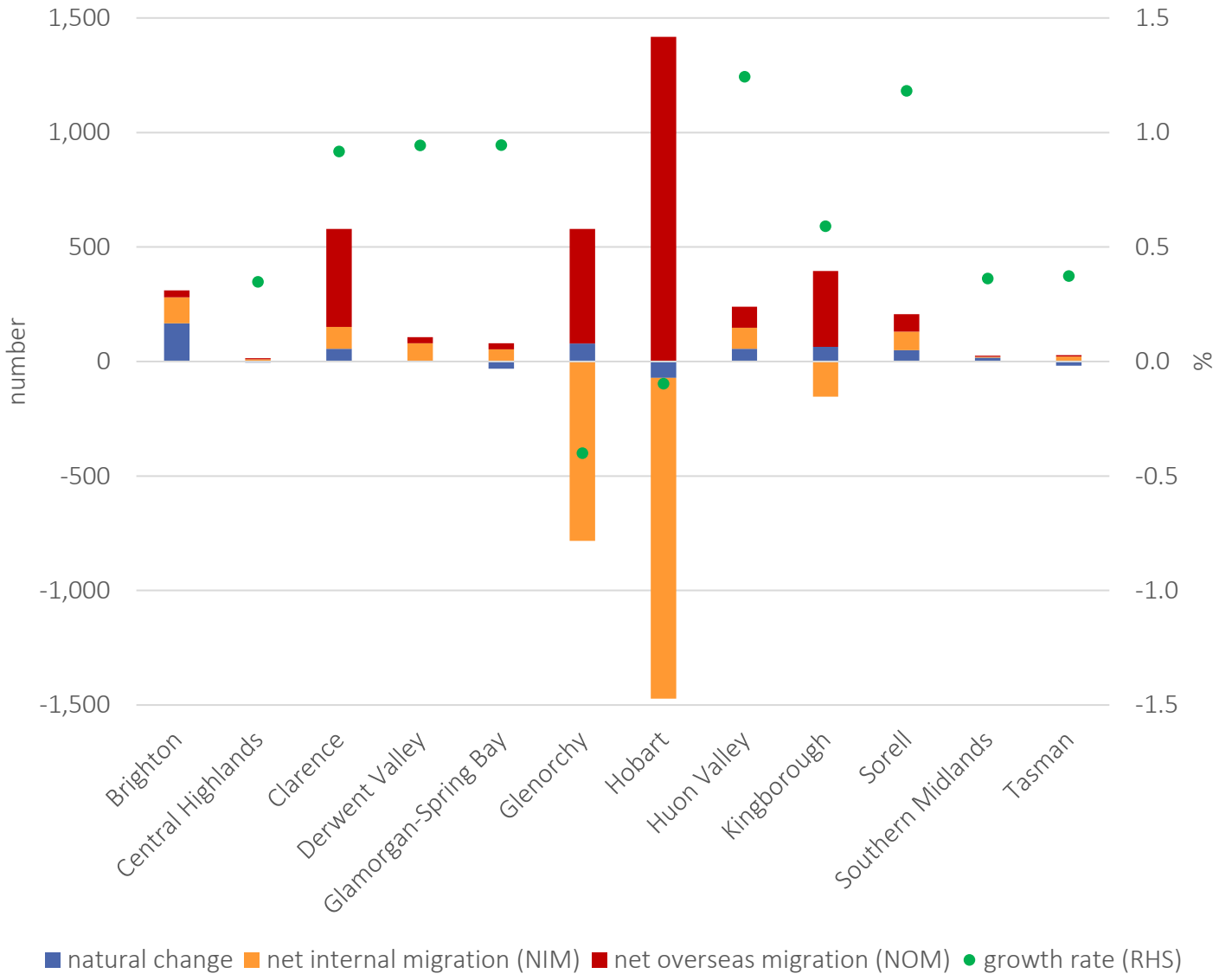
- population age structure
- migration

Driven by individuals, couples and/or family 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 ***liveability*** 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*

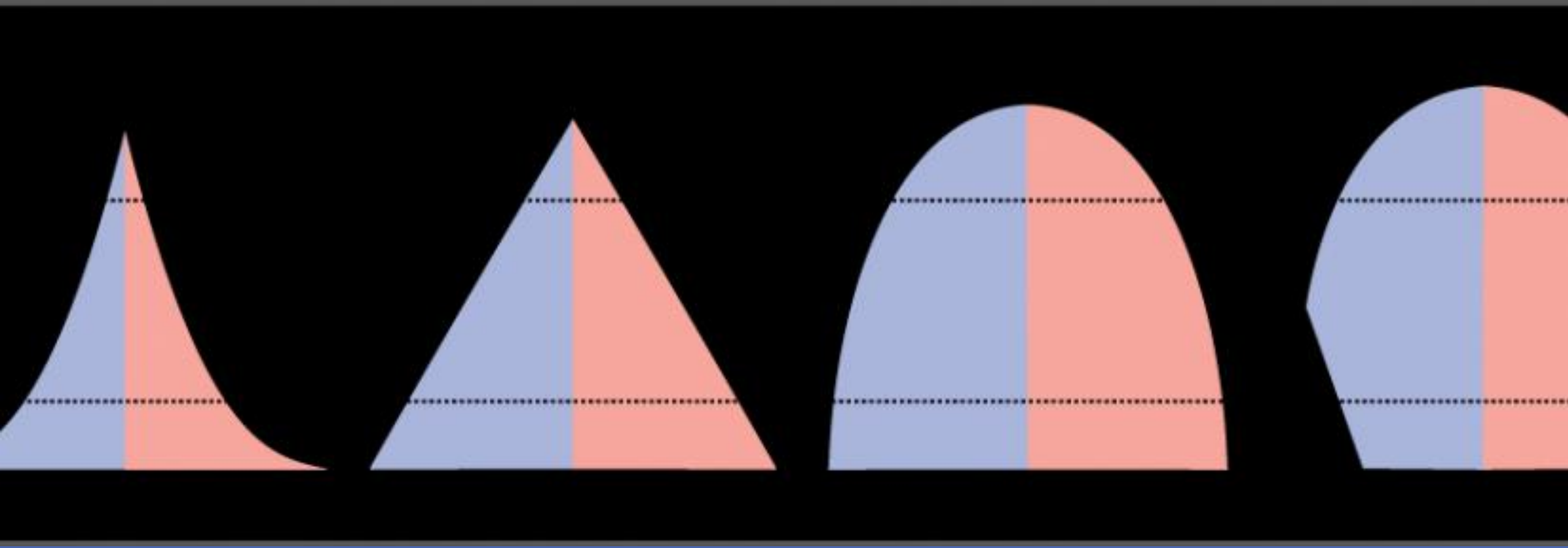


Source: ABS, Regional Population, 2023

Components of Population Change

Aggregation of decisions

- Natural Change (increase/decrease)
  - Demographic development
    - *Births*
    - *Deaths*
- Net Migration
  - Arrivals and departures
    - *Interstate*
    - *Overseas*



Projected population age structures

Southern Tasmania – 2023 to 2038

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 age structures and liveability

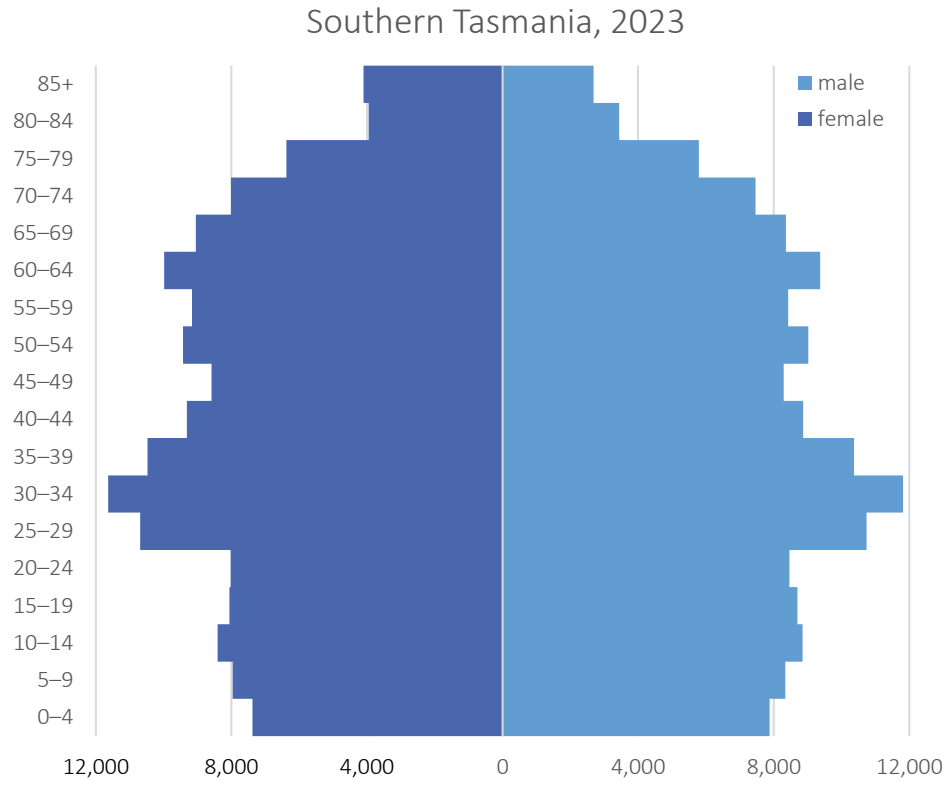
Population change is dramatic over time, incremental in time… even when population growth rates are low.

Population age structures are continually changing and along with it, the needs of the community change.

The **qualities and characteristics of a place** that **support wellbeing and quality of life** - collectively termed the '**liveability**' of a place - are **significant in attracting and retaining people** in communities.

If the liveability needs of a cohort/s in a community are no longer met they will move elsewhere to a place that better meets their needs, if they can.

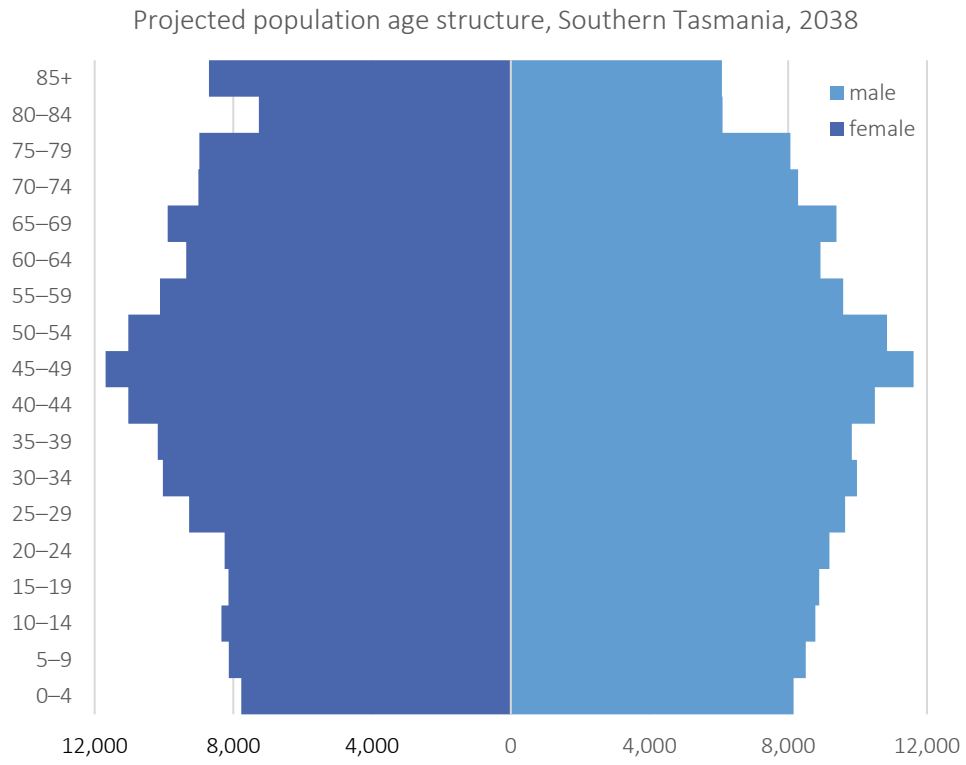
And the population age structure will change for both places.



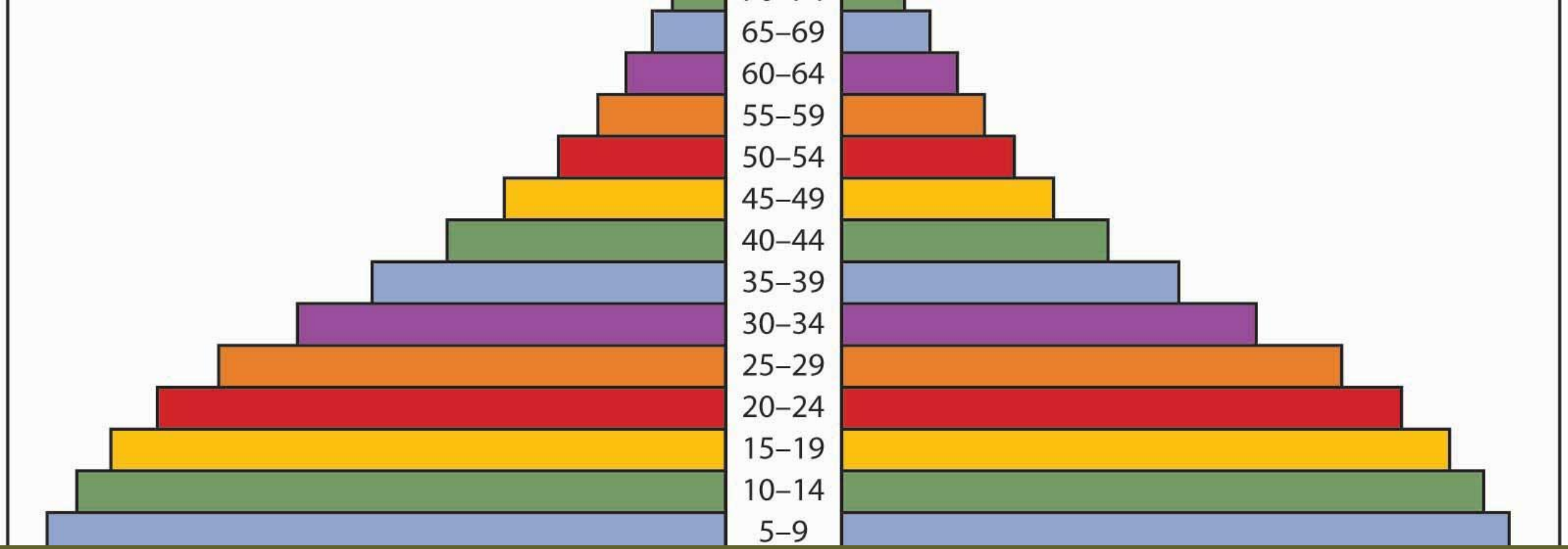
Source: ABS, Regional Population, 2023

Southern Tasmania - 2038 projected population

	2023	2038	Change (no.)	%
Population	297,586	329,586	32,114	10.8 0.72 pa
0-14 years	16.4%	15.1%	886	2.8
Working age	63.7%	60.1%	8,691	27.1
65-84 years	17.6%	20.3%	14,531	45.2
85+	2.3%	4.5%	8,007	25.0

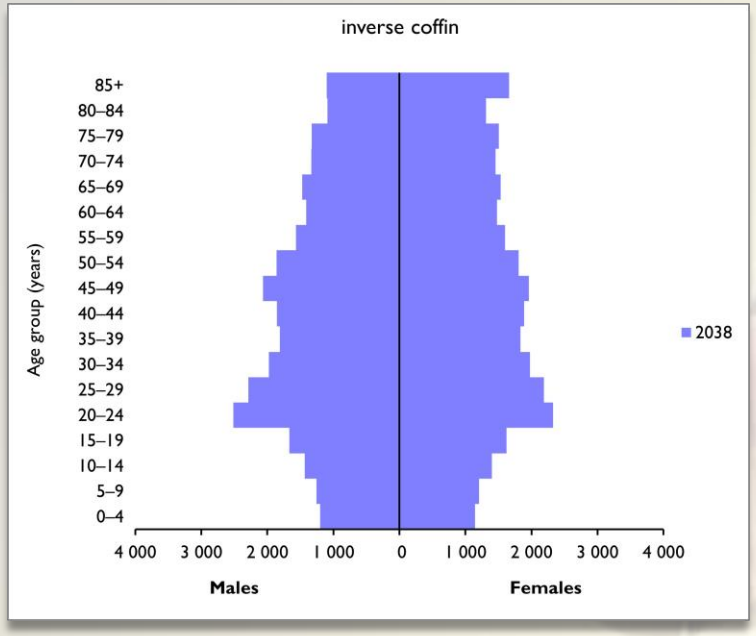


Source: ABS, Regional Population, 2023; Tasmanian Treasury, Population Projections, 2024



Projected population age structures - 2028

By Local Government Area – Southern Tasmania



Hobart (17.9%)

Overseas migration provides for almost all growth, particularly international students

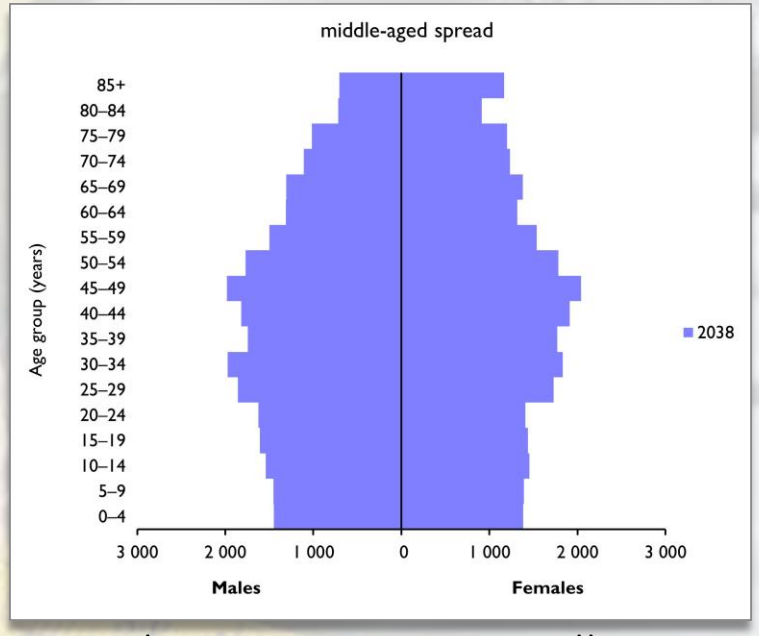
large internal migration losses

Very low TFR – due to high % of temporary migrants

Projected to grow 5.7%

Natural decline, NIM loss, NOM gain

Hyper-ageing



Clarence, Derwent Valley, Glenorchy, Kingborough (55.8%)

Periphery of major urban centre - commutable

Working families

More affordable family housing

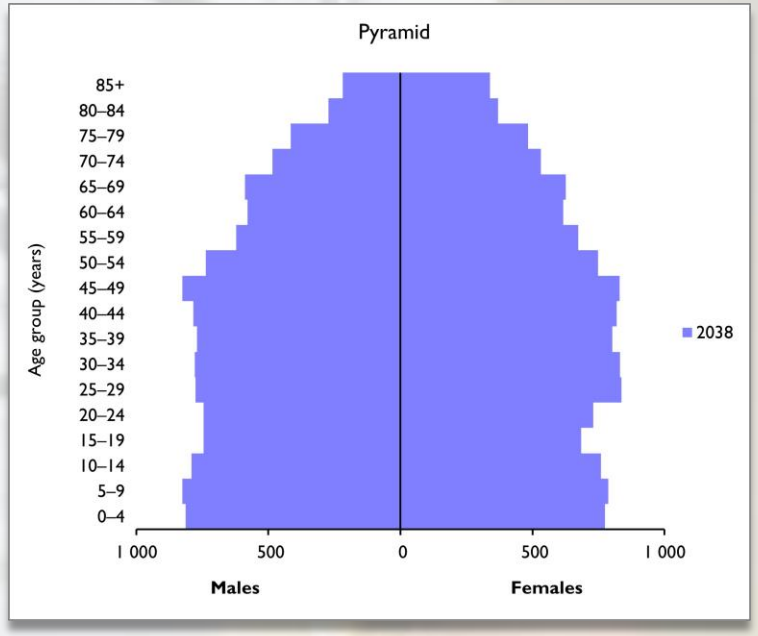
Greater access to education, employment and services

Projected to grow – 5.1% to 14.9%

Natural increase to decline

NIM dependent on NOM

Hyper-ageing



Brighton (7.3%)

Affordable

Previously growth driven by natural increase, now driven by internal migration

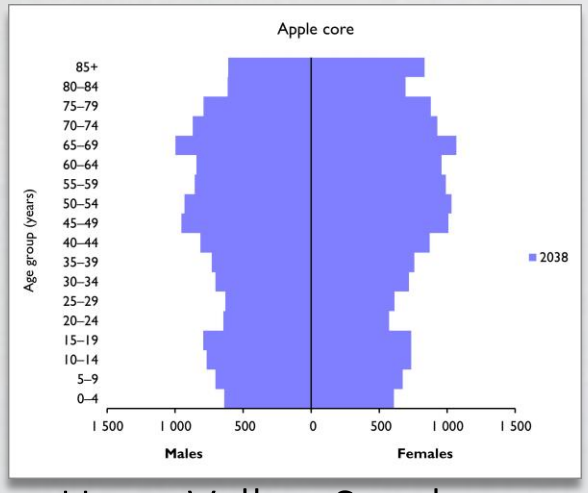
Projected growth rate 20.1%

Natural increase declining

TFR close to replacement level

NIM declining

NOM small



Huon Valley, Southern Midlands (9.0%)

Inner regional LGAs

Migration movements – older v younger

Lack of education and employment opportunities for school leavers and younger workers

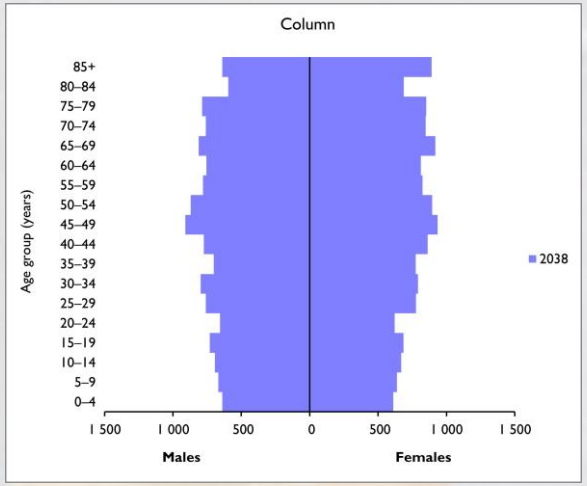
Huon Valley attractive tree change destination

Projected growth: HV - 15.3%, SM – 6.7%

Natural increase to decline

NIM and NOM large for HV, small for SM

Hyper-ageing (28.3%, 25.1%)



Sorell (6.5%)

Regional centre and inner regional

Commutable, working families, affordable, employment opportunities

Lifestyle destination – Southern Beaches

Projected growth: 21.7%

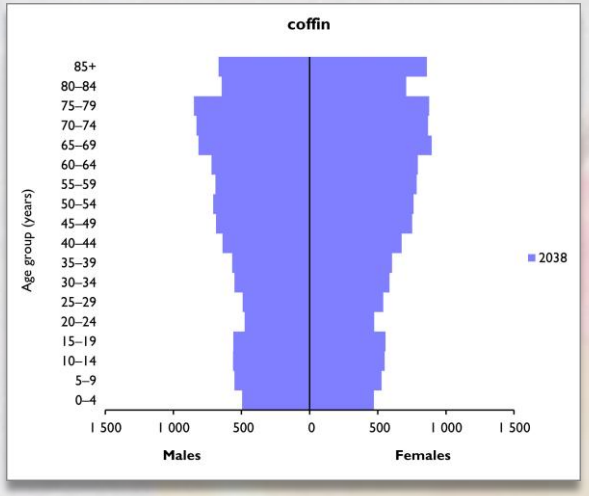
TFR – 1.8

Natural increase to decline

NIM large

NOM, medium

Hyper-ageing (26.7%)



Central Highlands (0.8%)

Migration movements – older v younger

Lack of education and employment opportunities for school leavers and younger workers

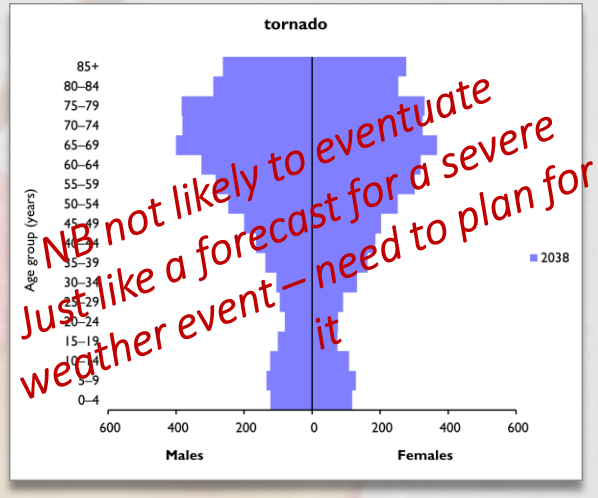
Median age 53.9 years

Projected growth 1.7%

Natural decline increasing

NIM negative, NOM small

Hyper-ageing (32.8%)



NB not likely to eventuate
Just like a forecast for a severe weather event – need to plan for it

Glamorgan-Spring Bay, Tasman (2.6%)

Growth in 80+ age group

remote LGAs

Lifestyle destinations

Attracts retirement age

Median age 59.5-62.0 years

Poorer quality education offerings

Lack of employment opportunities for younger people

Projected growth 7.5%, 11.0%

Hyper-ageing (41.0%, 44.4%)

Key messages

Population change is an aggregated measure of choices made by people. These decisions are influenced by perceived, desired and actual liveability factors.

Demographic change is dramatic over time, incremental in time.

The population age structure is always changing and, along with it, the needs of your community.

Population age structures differ for each LGA within Tasmania because they are experiencing different drivers of population change.

It is likely that some projected population age structures will not eventuate.

Population change is the aggregated outcome of decisions made by individuals, couples and families and their needs at a point-in-time and for the future.

Liveability factors such as housing, employment, education, access to health services, aged-related needs, transport and other policies directly and indirectly influence decisions about where people choose to live (and are able to live).

Population ageing is with us to stay. It's not reversable. It needs to be planned for.

It is important to keep tracking population change against projections and inter-censal socio-demographic changes to inform your strategic planning and policy development processes.



Further information: www.lisadenny.com.au

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