



The northern drift: recent demographic & urban development trends in coastal Queensland

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Outline

- Recent population and migration trends
- Population projections
- Residential land development trends
- Conclusion

Quote...

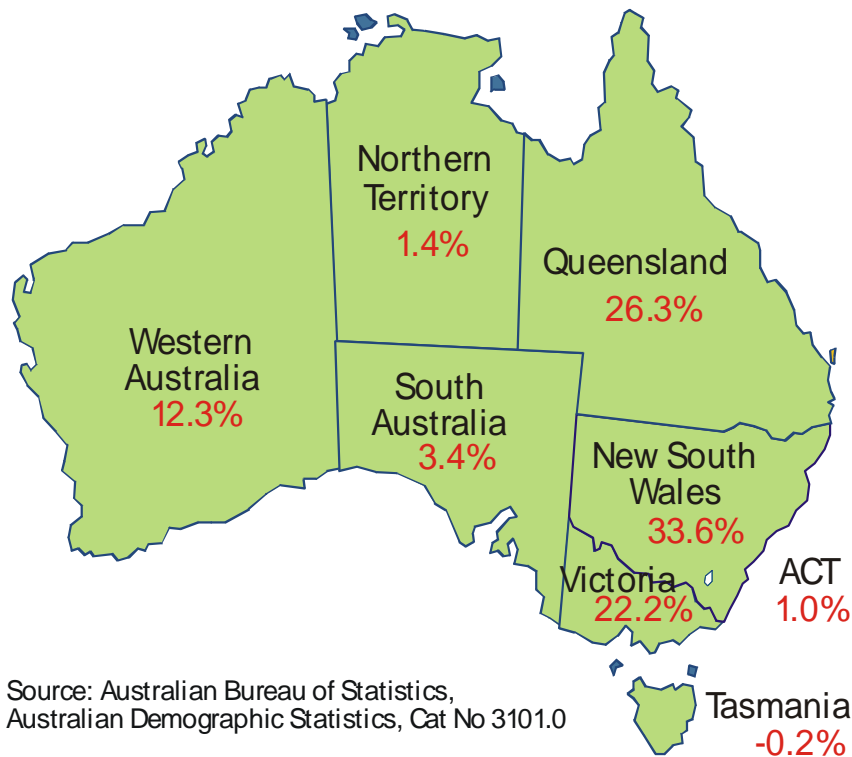
“Movement of young families from NSW to Queensland represents the primary demographic shift, which reflects the combination of housing affordability, employment opportunities and climatic advantages available in Queensland.”

BIS Shrapnel, *Building Industry Prospects*, March 2004

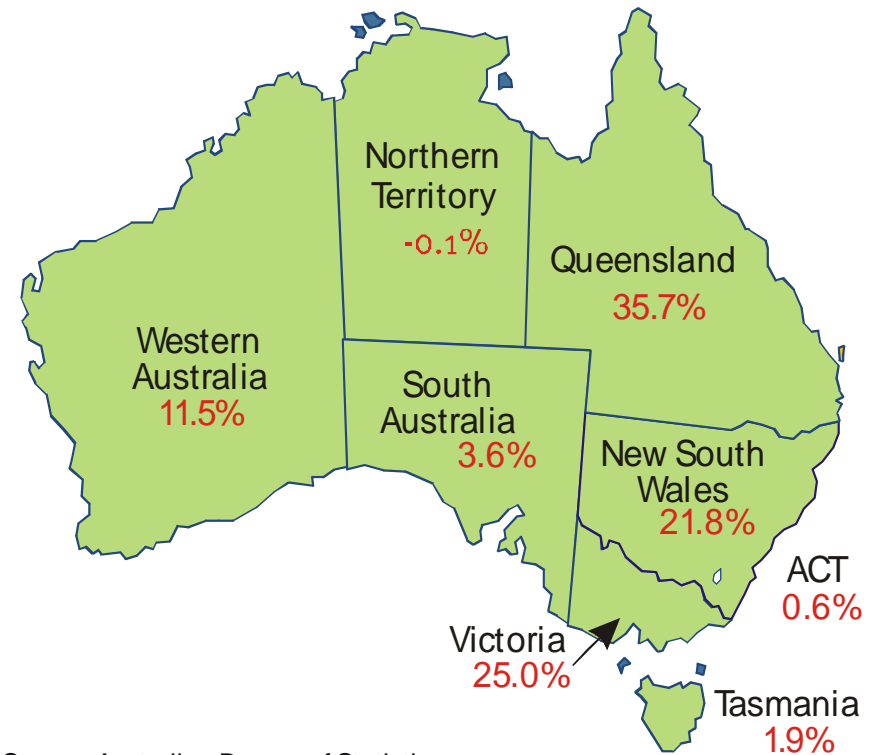
Rapid population growth

1996-2001

2002-2003

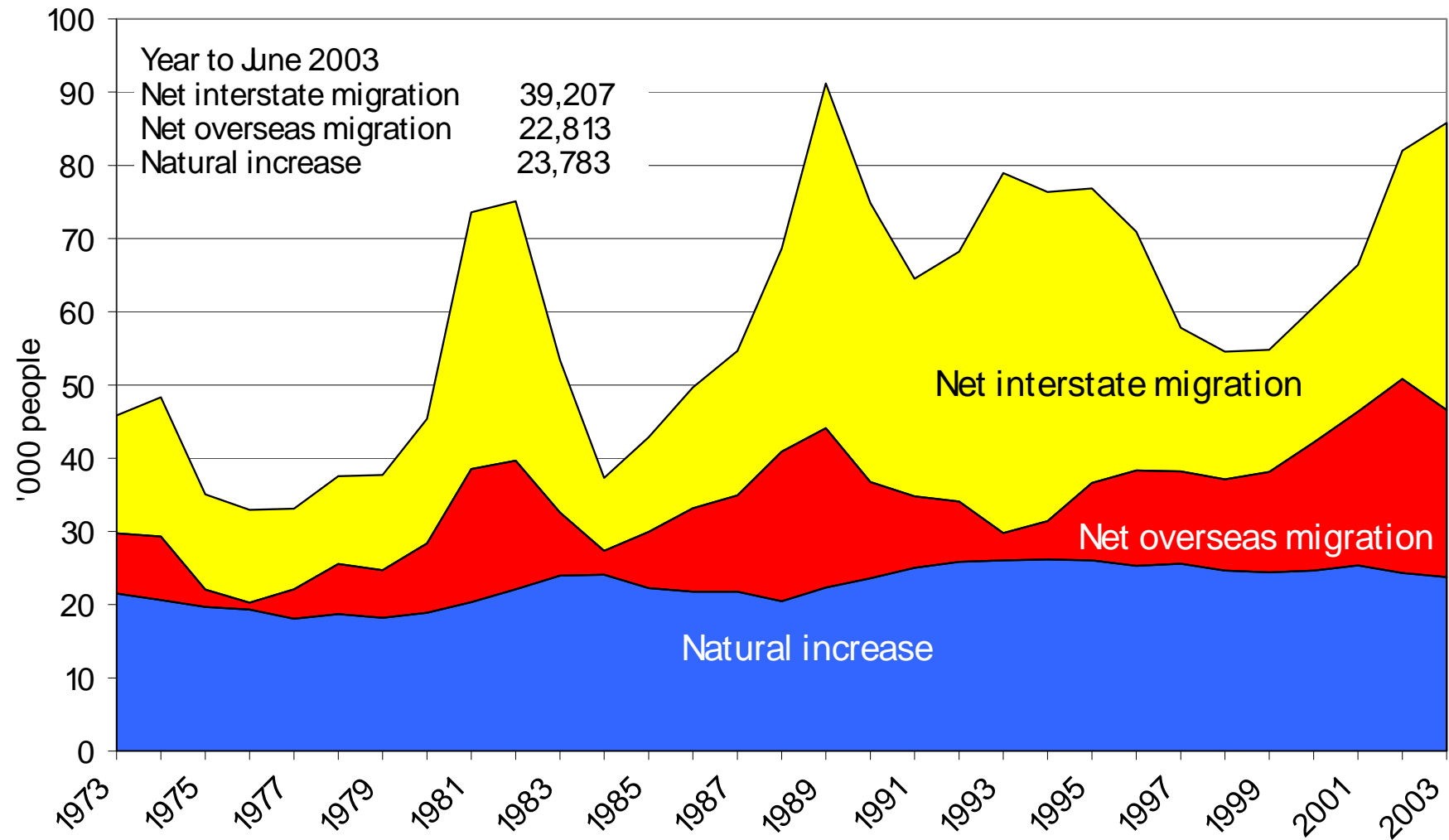


Source: Australian Bureau of Statistics, Australian Demographic Statistics, Cat No 3101.0



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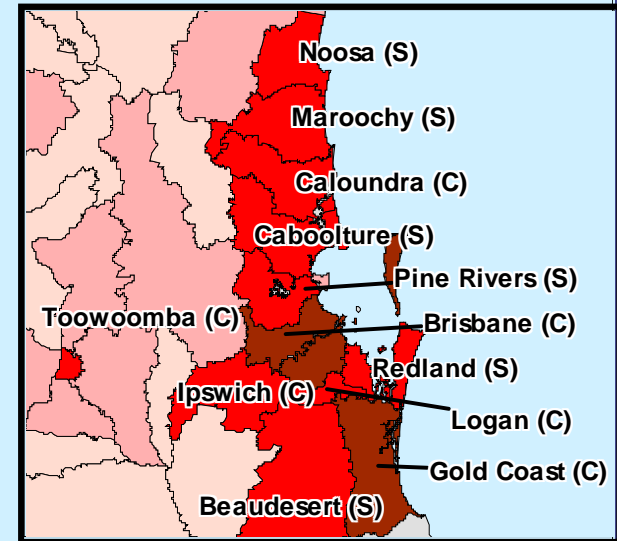
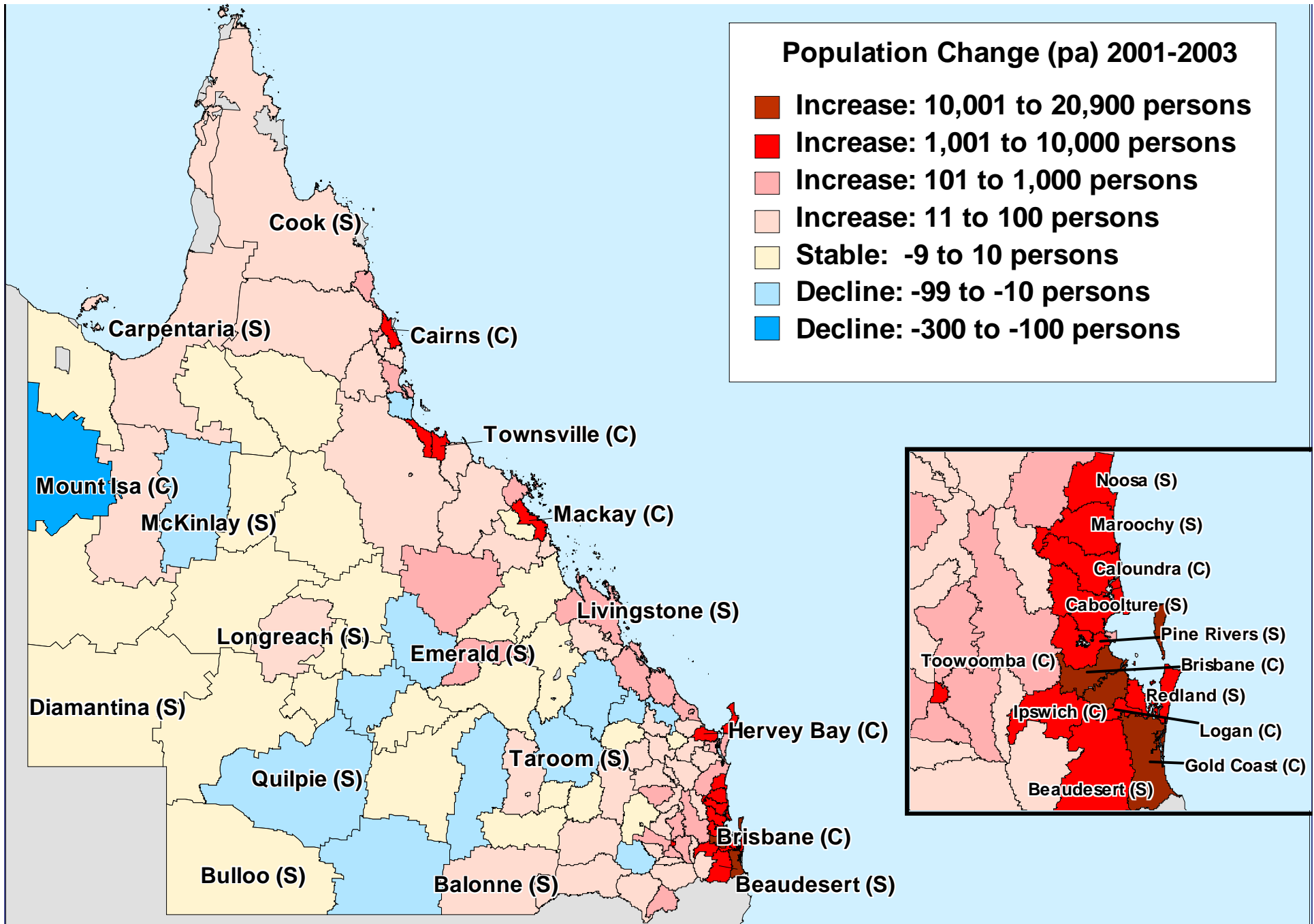
Components of population change



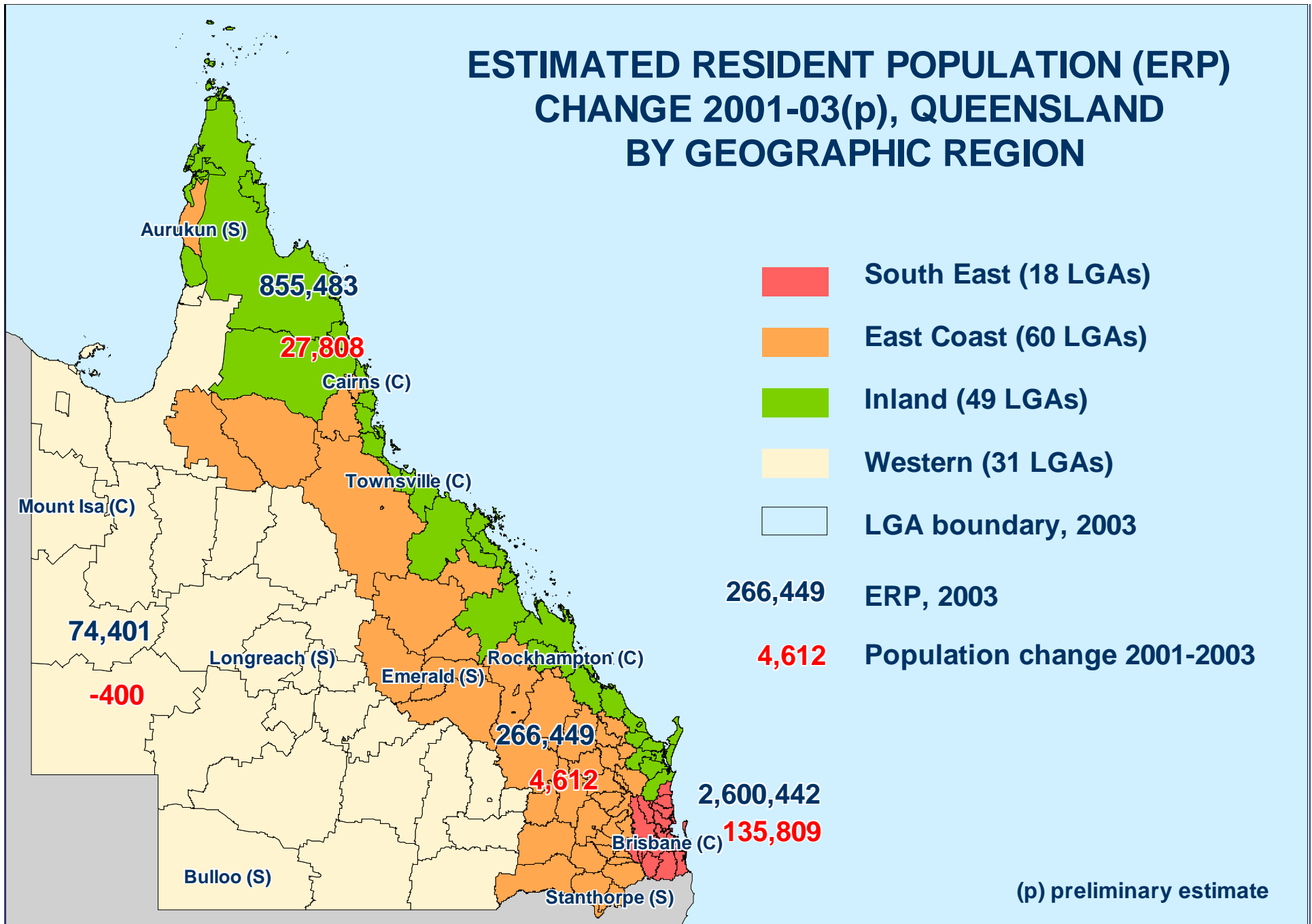
Source: ABS, Australian Demographic Statistics,
Cat. No. 3101.0 & unpublished data

Population Change (pa) 2001-2003

- Increase: 10,001 to 20,900 persons
- Increase: 1,001 to 10,000 persons
- Increase: 101 to 1,000 persons
- Increase: 11 to 100 persons
- Stable: -9 to 10 persons
- Decline: -99 to -10 persons
- Decline: -300 to -100 persons



ESTIMATED RESIDENT POPULATION (ERP) CHANGE 2001-03(p), QUEENSLAND BY GEOGRAPHIC REGION



Regional average annual population change 2001-03

	NI	ANM	Total
SEQ	15,559	52,346	67,905
Coastal	5,548	8,356	13,904
Inland	1,914	393	2,306
Western	772	-972	-200
Queensland	23,792*	60,123	83,915

*Includes offshore, not stated etc

Average annual population change, geographic regions in Queensland

	1996-01	% Qld	2001-03	% Qld
SEQ	47,970	82.6	67,905	80.9
East Coast	8,573	14.8	13,904	16.6
Inland	1,430	2.5	2,306	2.7
Queensland	58,051	100.0	83,915	100.0

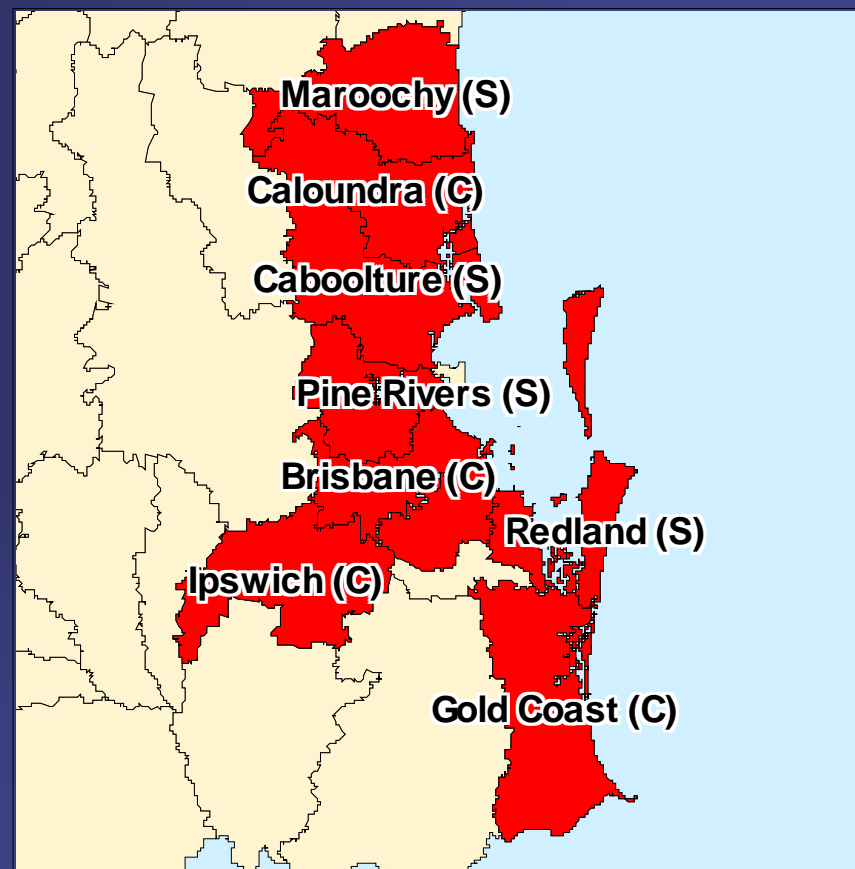
Average annual assumed net migration, geographic regions in Queensland

	1996-01	% Qld*	2001-03	% Qld*
SEQ	32,875	56.6	52,346	62.4
East Coast	2,160	3.7	8,356	10.0
Inland	-793	-1.4	393	0.5
Queensland	33,404	57.5	60,123	71.6

*Percentage of Queensland's total population change

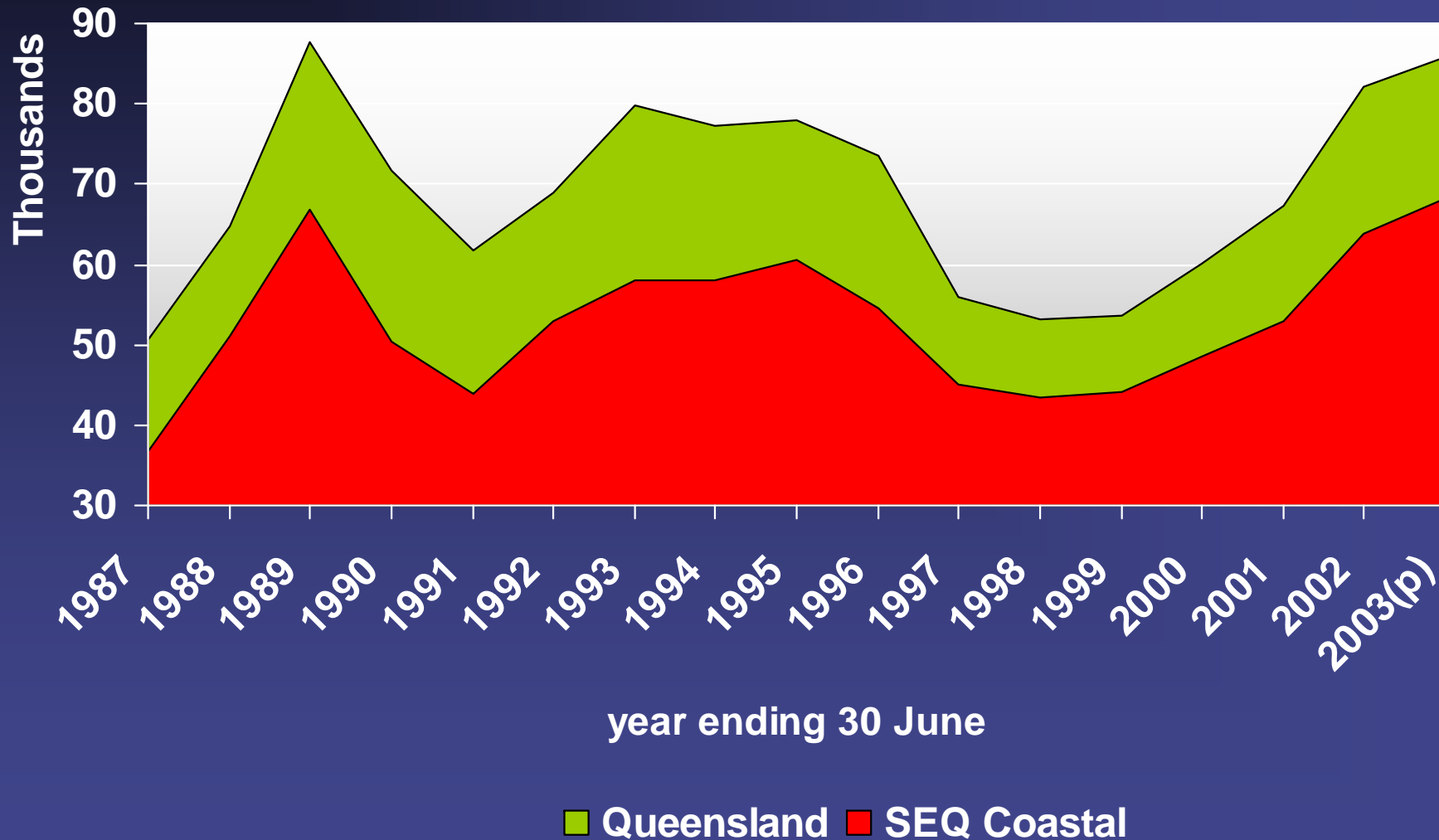
Largest growth LGAs 2002-03(p)

LGA	Growth	
	Number	Percent
Brisbane (C)	20,808	2.3
Gold Coast (C)	16,099	3.7
Pine Rivers (S)	6,208	4.9
Maroochy (S)	4,931	3.7
Redland (S)	4,189	3.5
Caloundra (C)	4,026	5.1
Caboolture (S)	3,839	3.3
Cairns (C)	2,814	2.4
Ipswich (C)	2,639	2.0
Hervey Bay (C)	2,231	5.0

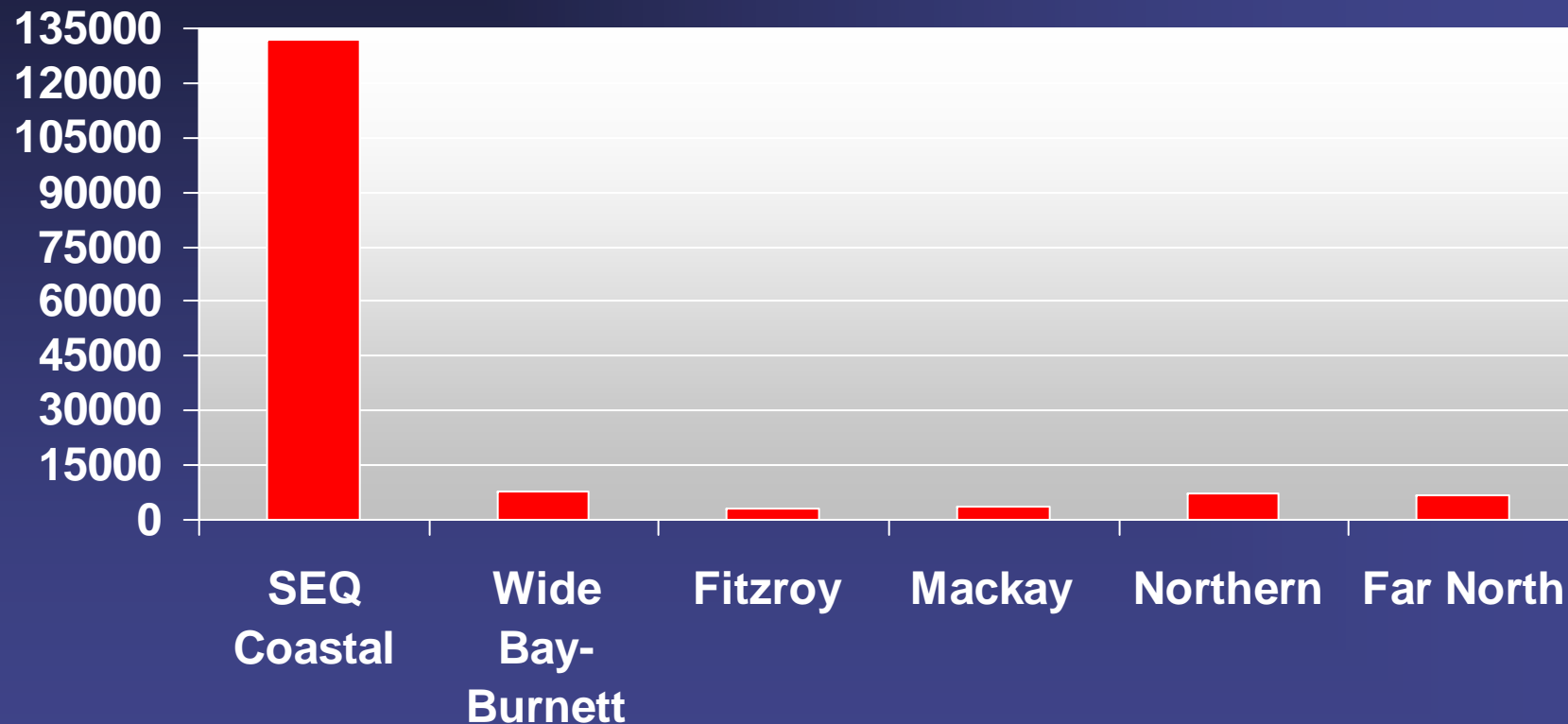


Absolute population change and percentage growth rates
(p) Preliminary estimate

Annual population change, SEQ coastal & Queensland

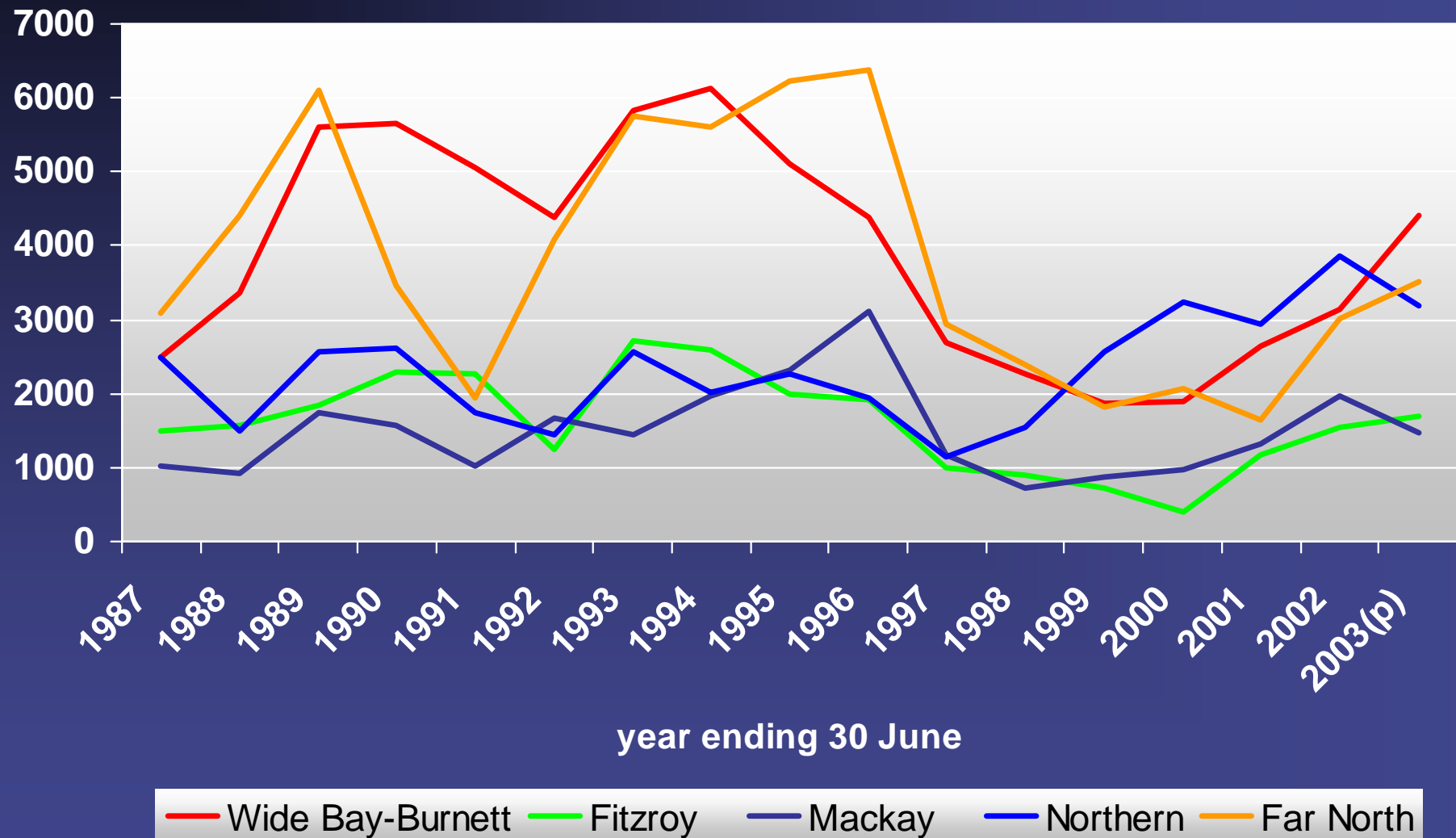


Total population change – coastal Queensland 2001-03(p)



(p) Preliminary estimate

Annual population change, coastal Queensland (non-SEQ)



Average annual population change, coastal Queensland*

	1996-01	% Coastal Qld	2001-03	% Coastal Qld
SEQ Coastal	46,802	84.5	66,043	82.6
Wide Bay/B	2,265	4.1	3,780	4.7
Central Qld	1,846	3.3	3,339	4.2
North Qld	4,462	8.1	6,786	8.5
Coastal QLD	55,375	100.0	79,947	100.0

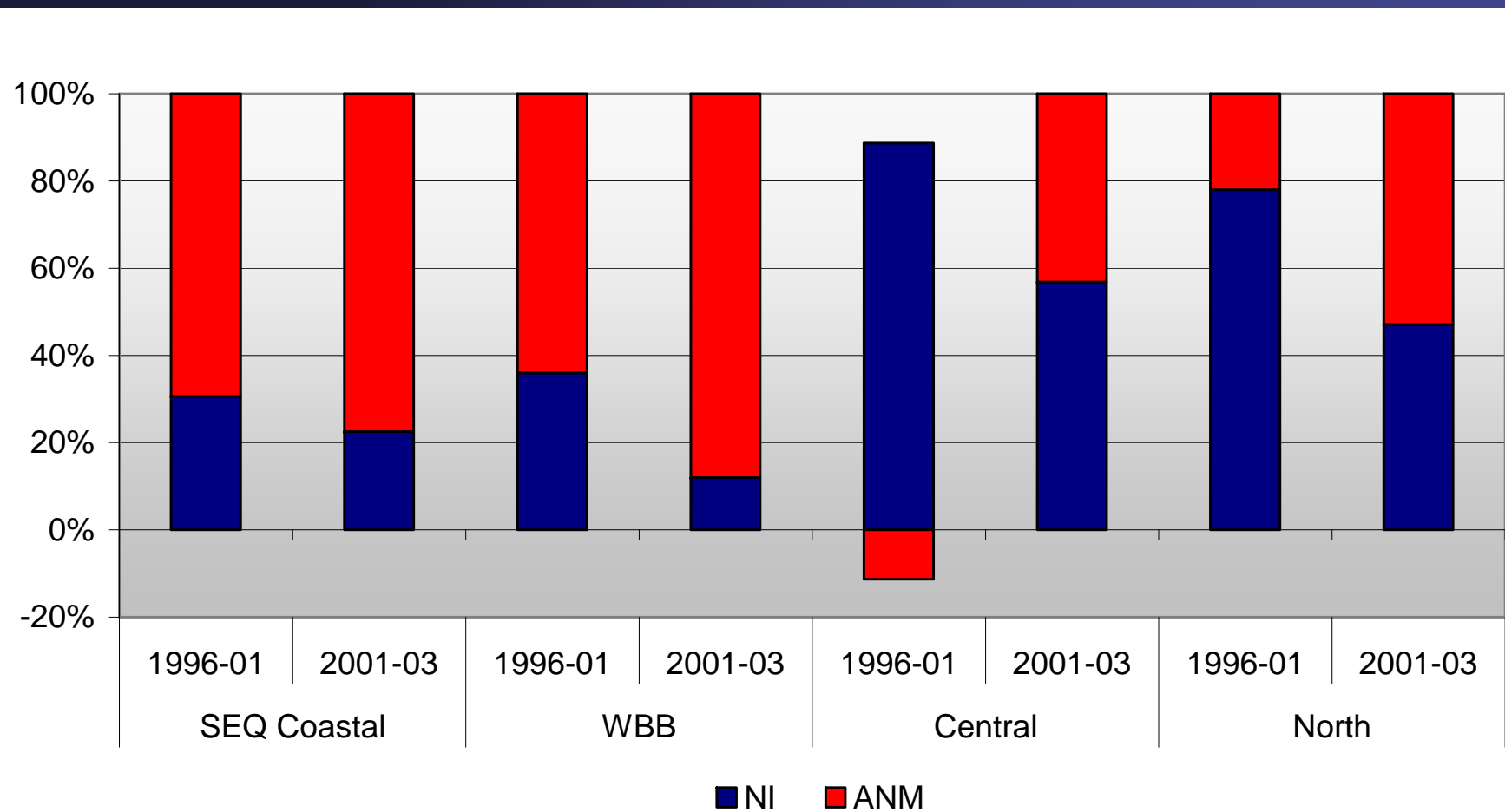
*Coastal LGAs only

Average annual assumed net migration, coastal Queensland*

	1996-01	% Coastal Qld	2001-03	% Coastal Qld
SEQ Coastal	32,455	93.8	51,176	86.0
Wide Bay/B	1,450	4.2	3,325	5.6
Central Qld	-270	-0.8	1,442	2.4
North Qld	980	2.8	3,590	6.0
Coastal QLD	34,615	100.0	59,532	100.0

*Coastal LGAs only

Components of average annual population change, coastal Queensland



Recent and projected population change for the coastal region

	1991-2001	% of Qld's growth	2001-2011	% of Qld's growth
BSD⁽¹⁾	285,287	44.5	302,480	43.5
Gold C'st (C)	141,390	22.0	150,206	21.6
Sunshine C'st⁽²⁾	85,865	13.4	93,980	13.5
SEQ Coastal	512,542	79.9	546,666	78.7
Wide Bay/B	37,161	5.8	44,708	6.4
Central Qld	30,197	4.7	38,317	5.5
North Qld	61,623	9.6	65,234	9.4
Coastal Qld	641,523	100.0	694,925	100.0

(1) Brisbane Statistical Division plus Ipswich (C) Part B, Caboolture (S) Part B & Beaudesert (S) Part B

(2) Sunshine Coast: Caloundra (C), Maroochy (S) & Noosa (S)

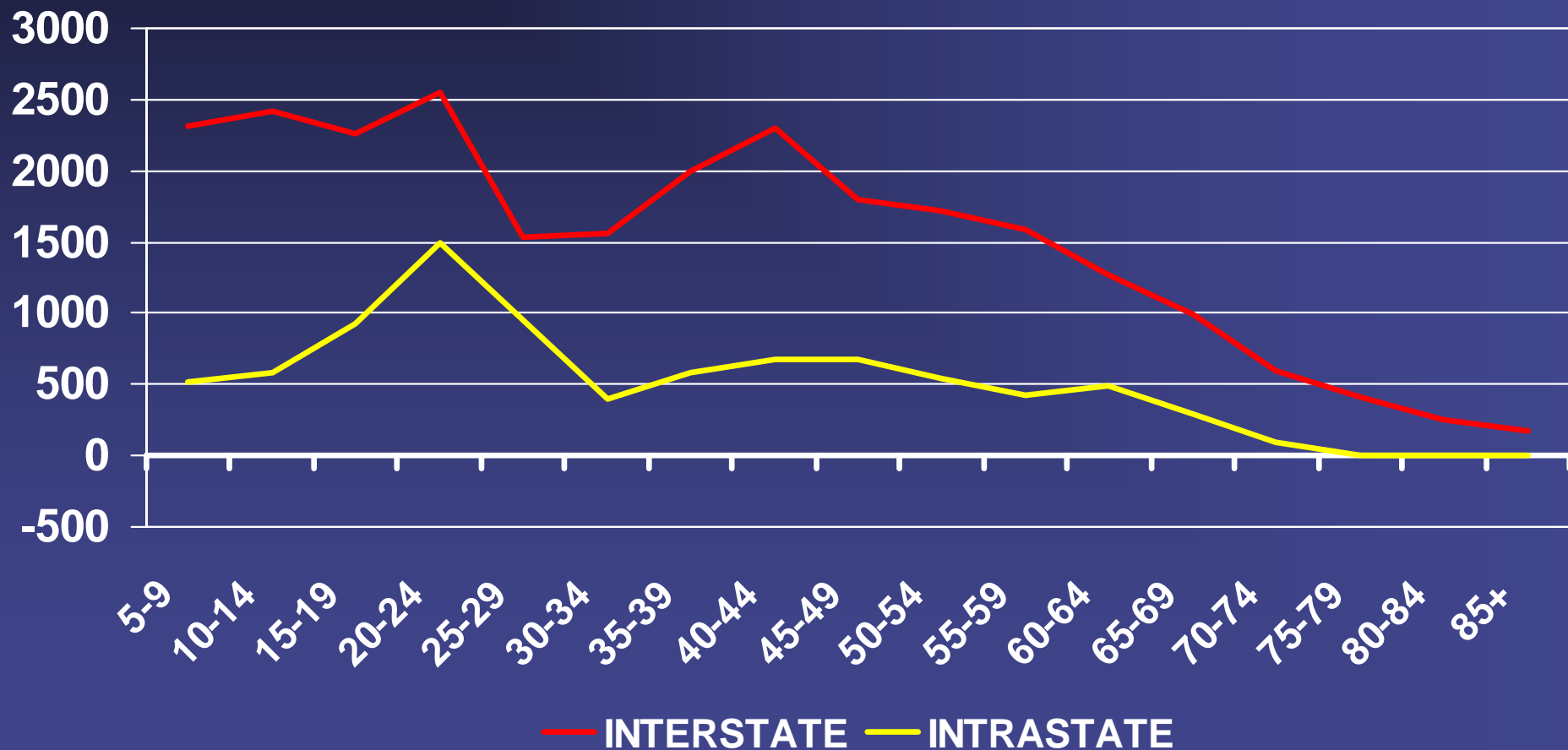


Internal Migration 1996-2001, Gold Coast

	In	Out	Net
Sunshine Coast	1,676	1,622	54
Brisbane and Environs ⁽¹⁾	20,748	16,591	4,157
Wide Bay Burnett	1,579	1,427	152
Central Qld	2,273	933	1,340
North Qld	2,922	1,537	1,385
Bal of Qld	4,385	2,812	1,573
Interstate	48,115	22,357	25,758
TOTAL AREA	81,698	47,279	34,419

(1) Remainder of South East Queensland

Net internal migration by age group 1996-2001, Gold Coast

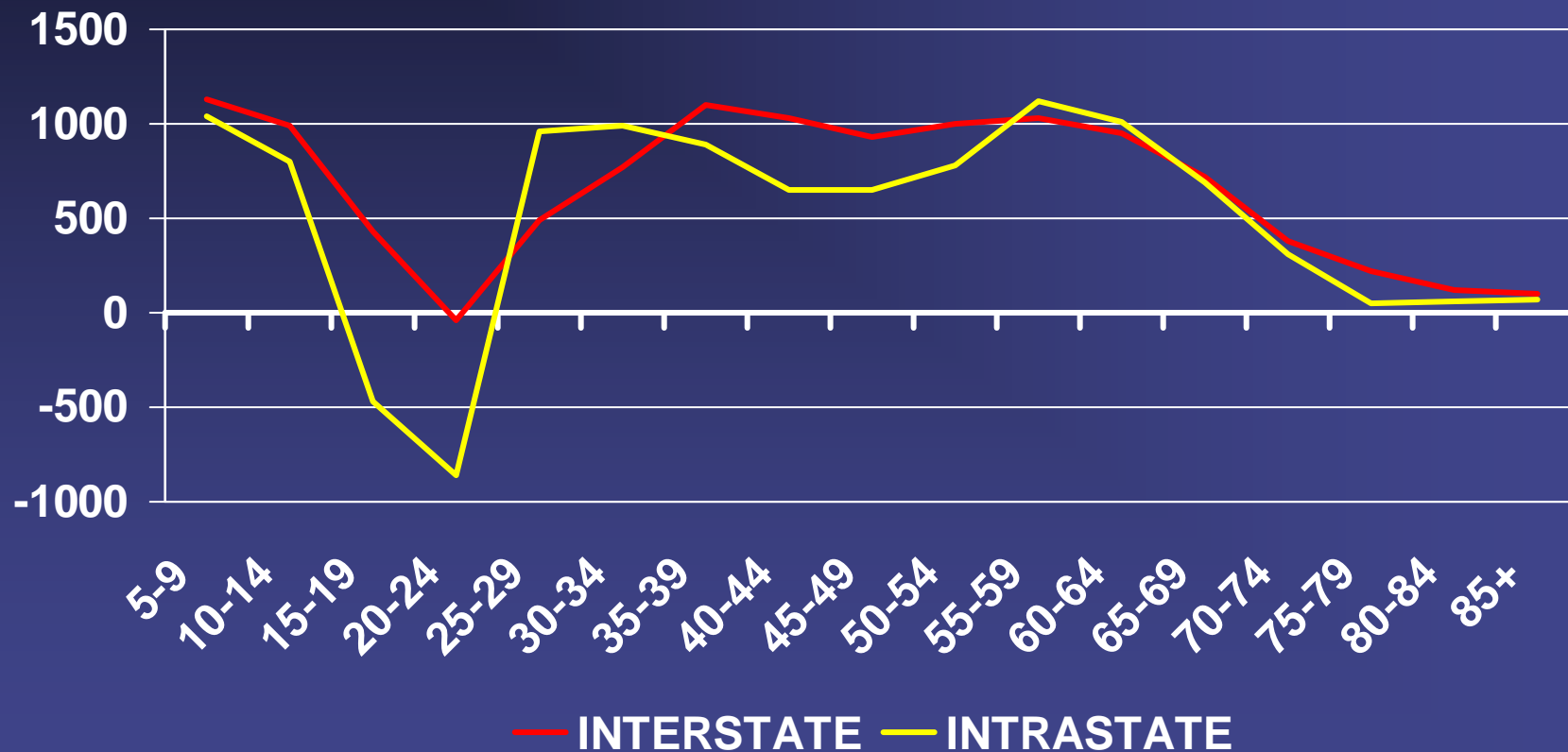


Internal Migration 1996-2001, Sunshine Coast

	In	Out	Net
Gold Coast	1,622	1,676	-54
Brisbane and Environs⁽¹⁾	14,914	11,620	3,294
Wide Bay Burnett	3,528	2,744	784
Central Qld	2,499	1,244	1,255
North Qld	2,464	1,516	948
Bal of Qld	5,764	3,236	2,528
Interstate	21,837	10,485	11,352
TOTAL AREA	52,628	32,521	20,107

(1) Remainder of South East Queensland

Net internal migration by age group 1996-2001, Sunshine Coast



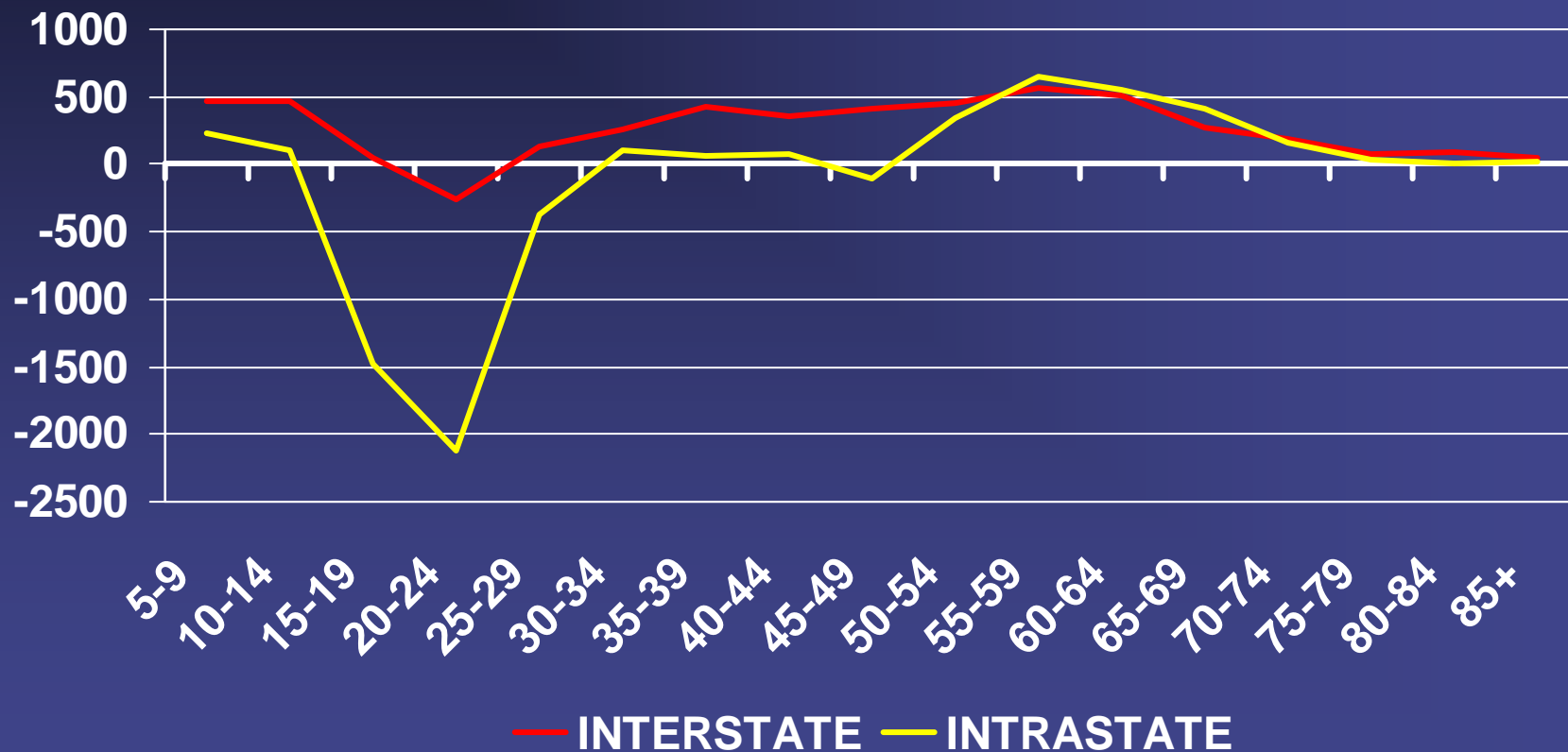
Source: ABS, 2001 Census unpublished data

Internal Migration, 1996-2001 coastal Wide Bay Burnett

	In	Out	Net
Gold Coast	1,427	1,579	-152
Sunshine Coast	2,744	3,528	-784
Brisbane and Environs ⁽¹⁾	7,037	10,085	-3,048
Central Queensland	2,679	2,573	106
North Queensland	2,143	1,666	477
Bal of Queensland	6,866	4,808	2,058
Interstate	11,673	7,148	4,525
TOTAL AREA	34,569	31,387	3,182

(1) Remainder of South East Queensland

Net internal migration by age group 1996-2001, Wide Bay-Burnett

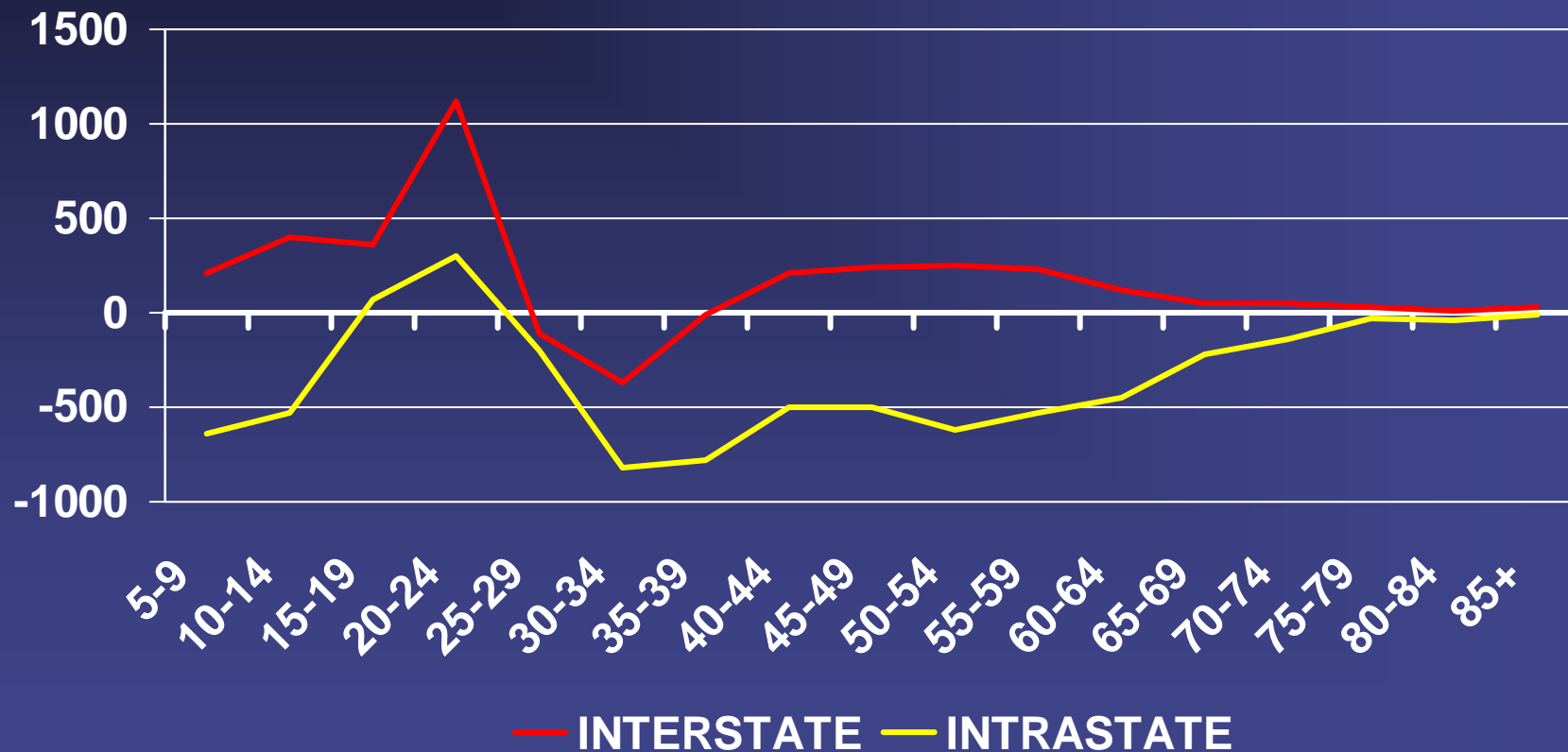


Internal Migration 1996-2001, coastal North Queensland

	In	Out	Net
Gold Coast	1,537	2,922	-1,385
Sunshine Coast	1,516	2,464	-948
Brisbane and Environs⁽¹⁾	8,889	15,365	-6,476
Wide Bay Burnett	1,666	2,143	-477
Central Queensland	5,292	3,570	1,722
Bal of Queensland	10,738	8,812	1,926
Interstate	25,070	22,238	2,832
TOTAL AREA	54,708	57,514	-2,806

(1) Remainder of South East Queensland

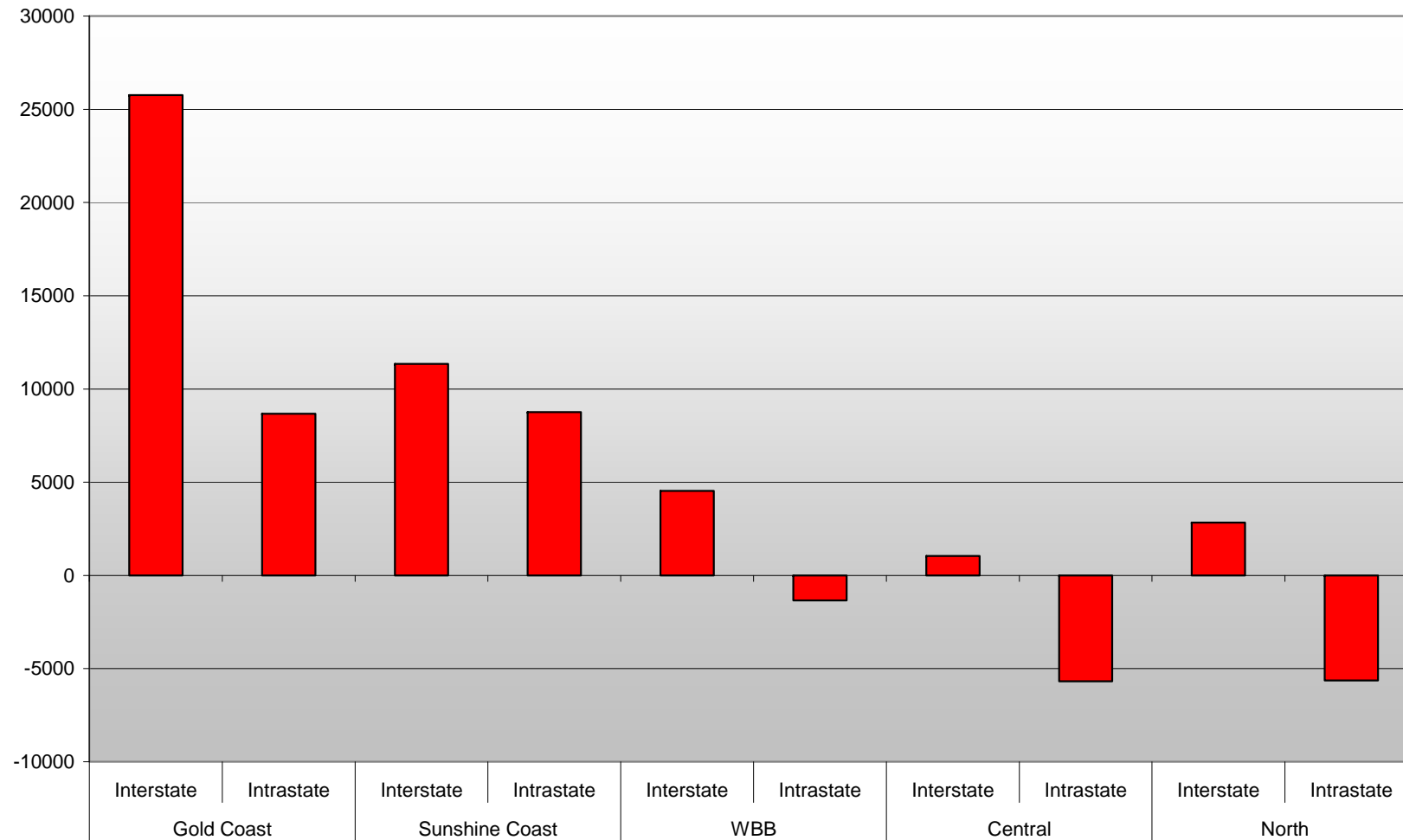
Net internal migration by age group 1996-2001, North Queensland



Source: ABS, 2001 Census unpublished data

Internal migration 1996-2001

Coastal Region, Qld



Recent residential land approvals, coastal Queensland

	Year Ending Sept 02	Year Ending Sep 03	% Change
Brisbane City	4,600	5,022	9.2
NORSROC	4,428	7,623	72.2
SouthROC (a)	5,132	6,587	28.4
WESROC	1,086	3,590	230.6
South East QLD	15,246	22,822	49.7
Wide Bay	805	2,687	233.8
Central QLD	1,732	2,510	44.9
North QLD	1,459	2,258	54.8
TOTAL STUDY AREA	19,242	30,277	57.3

(a) QLD component only

Land consumption coastal Queensland (ha), year ending September 2003

	Urban Residential	Rural Residential
Brisbane City	456	108
NORSROC	892	1,484
SouthROC (a)	715	638
WESROC	279	251
South East QLD	2,342	2,481
Wide Bay	554	333
Central QLD	353	395
North QLD	215	478
TOTAL STUDY AREA	3,464	3,687
No. of Lots (Study Area)	27,400	2,900

(a) QLD component only

Conclusion

- Migration to Queensland increases in all coastal regions since 2001
- SEQ dominates population growth and migration levels
- Migration age profile
 - Gold Coast – growth in all age groups
 - Sunshine Coast & Wide Bay-Burnett loses young
 - Far North loses people over 25 years
- In growth terms the market is bullish – both population and residential development