

Georges River Council

Population Forecast adjustment September 2023

Prepared for Georges River Council

17 November 2023

Forecast.id – September 2023 Population forecast adjustment.

Summary of assumptions and results and comparison to Evidence Base document

1.1 Background

In January 2023 .id rebased the previously existing Georges River Council population forecast with data from the 2021 Census but did not adjust any of the demographic or dwelling assumptions concerning the post-2021 period.

In September 2023, .id completed a comprehensive update of the post-2021 elements of the Population forecast, extending it to 2046, remodelling demographic and dwelling change assumptions, while keeping the same geographic areas.

Overall, growth dynamics are similar to the January 2021 rebased forecast. The population is still forecast to reach approximately 176,000 by 2036. The extension of the forecast to 2046 provides additional information – the population is forecast to be 184,426 by 2046.

The updated forecast will be available at <https://forecast.id.com.au/georges-river>

Key Assumptions for September 2023 Population adjustment -

The forecasts are based on the 2021 Census. This provides the starting point for the forecasts and consists of information on:

- The number of people by single year of age and sex,
- The number of occupied and unoccupied dwellings,
- The number of people in non-private dwellings by age and sex,
- The propensity of people in occupied private dwellings to form one of six household types (Couple families with dependents, Couples without dependents, Group Households, Lone Person households, One parent families and Other families).

Births

The number of births in Georges River Council are derived by multiplying age specific fertility rates of women aged 15-49 by the female population in these age groups for all years during the

forecast period. This data is then scaled to meet the most recent ABS births data at the LGA level. It is then assumed that the birth rate will slightly reduce over the forecast period.

Deaths

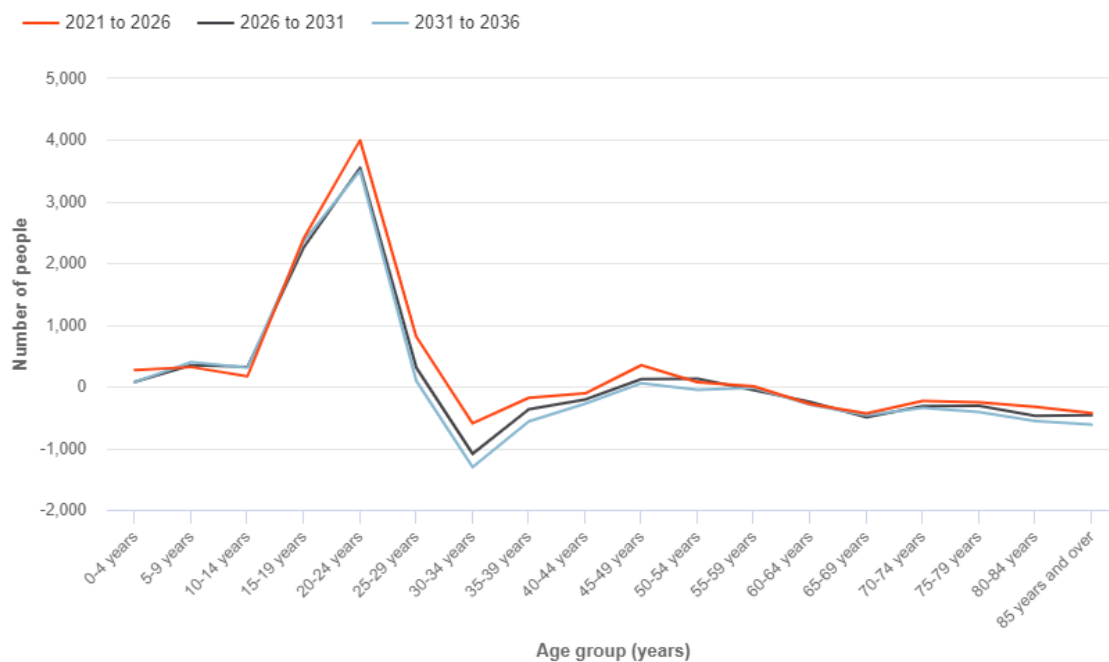
The forecast number of deaths in Georges River Council is a reflection of death rates assumed for small areas. For historical years, this will equal the number of deaths published by the ABS, where this information was available at the time of forecasting. These rates are based on historical estimates for Georges River Council, which have been extrapolated into the future, assuming an increase in expectation of life in all age groups (except 85 years and over).

Migration

Net migration rates for the forecast period are based on historical trends, and reflect the role and function of the small area in question. For the LGA as a whole, net migration assumption can be seen in Figure 1 below, which shows net migration of 5-year age cohorts for each 5-year period for the first 15 years of the forecast period. The axis represents a zero net migration rate meaning the population of a particular cohort is unchanging over time. Where the line is above the axis, there is a net gain of population, and where it falls below, a net loss. Migration is affected by housing availability, affordability, and amenity.

Forecast net migration by age group

Georges River Council



Source: Population and household forecasts, 2021 to 2046, prepared by .id (informed decisions), September 2023.

Figure 1. Net migration by age.

Each small area has a different net migration profile assumed, depending on its role and function. This can be accessed on the website under the left-hand side menu under the “Assumptions – Net migration by age” section.

Typically, suburban areas have a large stock of family type housing attracting family groups but losing young adults (aged 18-24 years) accessing affordable housing, employment, or tertiary education elsewhere. The ages of the parental cohorts will vary according to affordability and amenity. There is a loss of empty-nesters (aged 55-65) downsizing or accessing life-style opportunities.

Areas with high-rise dwellings (such as the Hurstville City Centre and Kogarah) typically attract young adults but lose younger families (parents aged 20-30 with children aged 0-4) seeking access to family type housing.

Residential Development

The addition of dwellings to the housing stock is a major driver of population growth in an area and reflects assumptions around regional demand for housing (for example as reflected by the post-COVID inwards migration “bounce back” to Australia and Sydney) and local land development opportunity and supply.

Residential development can take various forms depending on the availability of land. The land supply assumed includes subdivisions in existing residential neighbourhoods (often called infill development), and the densification of housing within appropriately zoned areas.

The .id forecast model does not distinguish between dwelling type (e.g. detached / semi-detached / flat) or dwelling size (number of bedrooms), addressing household size and family type via a household composition model. The input required to the model is the number net additional dwellings per year, for each year for each small area.

To determine the net additional dwellings per year by small area, residential development is accounted for by assessing large sites individually where information is available and where sufficient information is not available, by making general assumptions (including for infill).

Larger / key sites

Larger sites are identified via information provided by Council, .id’s own research, and other government publications (e.g. State Government planning authorities, or housing authorities). Sites included are predicted to result in 10 or more net additional dwellings. Where evidence is available, we will use a reported yield and completion date, otherwise these elements are

estimated. When the forecasts are revised, these sites are updated as further details are available.

Larger / key sites are divided into two categories: those that have approval (or if not, where we judge we have sufficient information to conclude are likely to proceed with the information at hand), and areas that have recently had planning controls changed, or have had plans adopted or in progress by Council that would result in additional dwelling construction (“Activity Centres”).

For example, the Mortdale Town Centre Master Plan and Beverly Hills Master Plan are included as sites in the second category (“Activity Centre”), with the yield estimate as provided by Council and an assumption that they will develop over the later part of the forecast period. Likewise, the Kogarah New City Plan (a collection of rezoning and planning control changes applied in 2017) identifies 3 precincts¹, within which sites have been created based on the aerial imagery provided in the New City Plan Gazetted Amendment Number 2 document.

Evidence from development applications or where a site has been constructed upon may provide enough information to separate specific locations into individual sites with yield and timing data. Where an Activity Centre site does not have a development application or new development on it, it is assumed that it will develop, at a similar density to nearby completed sites, and over the medium term, with an assumed take up rate, accounting for the chance that parts of the Activity Centre do not develop.

Conversely, a site will not be included where residential development is not supported under the current planning scheme or where future development remains uncertain. For example, the future Housing Investigation areas identified in the Georges River Local Strategic Planning Statement 2040 on Pages 18 & 19 are identified general areas for future investigation, but there is no further information as to the nature of what might be achieved, nor specific location.

A total of 8,547 dwellings are assumed to be delivered in the major sites between 2022 and 2046, of which 5,756 are in the “approved” category, and 2,791 in the Activity Centres.

Approved sites are presumed to deliver the specific number of dwellings identified (i.e. 100% take up rate), whereas Activity Centre sites are assumed to have a take up rate representing the chance that development may not occur on all plots in the Activity Centre(s). In particular:

- * Kogarah New City Plan High density residential zoned areas (R4): 90%
- * Kogarah New City Plan Mixed Use Zones: 70%
- * Beverly Hills Master Plan: 70%

¹ Blakehurst Precinct, Carlton Precinct, South Hurstville Precinct

- * Mortdale Master Plan: 70%
- * Housing Investigation Areas: 70%
- * Peakhurst High density residential remainder: 90%

Specific yield estimates and timings are included on the Assumptions – Residential Development page on the website.

Non-specific development and Infill

Non-specific development and Infill includes developments that where a general development rate is assumed for a small area where specific sites cannot be identified, and includes locations where fewer than 10 new dwellings are assumed (representing small scale subdivisions within the existing residential areas). The 'Potential net additional dwelling' figures from Figure 52 of the Evidence Base for Local Housing Strategy (March 2023) have been adopted for Non-specific development and infill, with one modification. The September 2023 forecast adjustment specifically includes major sites not considered in the Evidence Base document. To address potential double-counting, we have amended the infill assumptions. This resulted in an overall reduction of infill from 4,696 to 4,396 (300 fewer).

Non-Private dwellings

Non-private dwellings are institutions that have a residential component. Within Georges River this is principally aged care services. The number of people in aged care is assumed to increase owing to the ageing of the population overtime. These assumptions have not changed from the previous iteration of the forecast.

1.2 Results

The population of Georges River is forecast to be 184,426 by 2046, an increase of 31,699 from 2021.

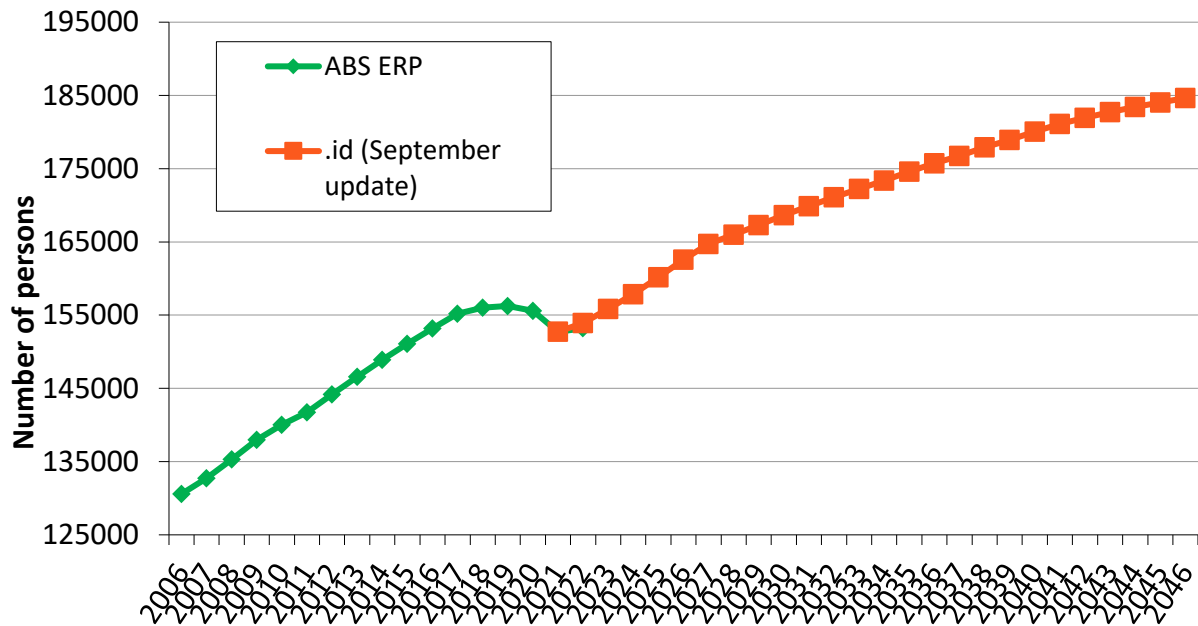


Figure 2. Historical Estimated Population (ERP) and Population forecast, Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0), and .id

Key findings

The growth rate rebounds from the COVID related fall to 1.25% between 2022-2026 before falling to 0.39% between 2042-2046 as identified housing opportunities are delivered.

Growth continues to be concentrated in Hurstville City Centre and Kogarah, with the Beverly Hills Master Plan and the Kogarah New City Plan contributing to smaller, but notable, growth in Beverly Park – Narwee and Carlton (Table 1).

Table 1. Summary of population growth.

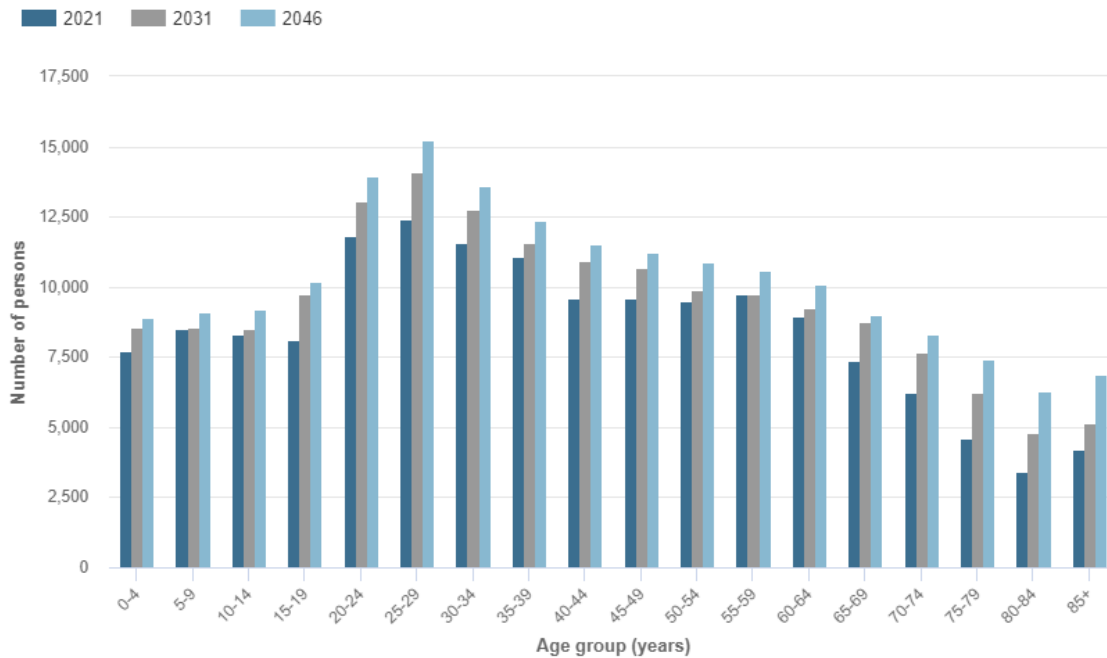
Population summary									
Georges River Council							Forecast year		Change between 2021 and 2046
Area	2021 ↕	2026 ↕	2031 ↕	2036 ↕	2041 ↕	2046 ↕	Total change ↕	Avg. annual % change ↕	
Georges River Council	152,727	162,451	169,829	175,593	180,876	184,426	+31,699	+0.76	
Allawah	5,377	5,522	5,551	5,544	5,511	5,511	+133	+0.10	
Beverley Park - Ramsgate	2,641	3,182	3,543	3,816	3,803	3,798	+1,157	+1.46	
Beverly Hills - Narwee	10,857	11,085	11,195	11,560	12,367	13,050	+2,193	+0.74	
Blakehurst	6,613	6,850	7,192	7,629	7,931	8,183	+1,569	+0.86	
Carlton	6,859	7,677	8,209	8,583	8,891	8,864	+2,005	+1.03	
Connells Point - Kyle Bay	3,912	3,785	3,729	3,700	3,679	3,675	-237	-0.25	
Hurstville City Centre	9,948	12,047	13,274	15,398	17,857	19,833	+9,885	+2.80	
Hurstville Grove	2,773	2,758	2,717	2,675	2,656	2,656	-117	-0.17	
Hurstville Remainder	20,955	21,862	23,050	23,795	24,075	24,328	+3,373	+0.60	
Kingsgrove	3,726	3,737	3,764	3,708	3,706	3,699	-27	-0.03	
Kogarah	7,157	9,844	11,744	12,026	12,337	12,671	+5,514	+2.31	
Kogarah Bay - Carss Park	3,470	3,577	3,892	4,015	3,997	3,965	+495	+0.54	
Lugarno	5,889	5,827	5,774	5,725	5,713	5,702	-187	-0.13	
Mortdale	10,706	10,998	11,344	11,924	12,266	12,256	+1,551	+0.54	
Oatley	10,672	10,746	10,872	10,883	10,889	10,910	+238	+0.09	
Peakhurst	12,169	12,889	13,551	13,994	14,172	14,023	+1,854	+0.57	
Peakhurst Heights	2,518	2,470	2,459	2,468	2,436	2,420	-98	-0.16	
Penshurst	12,441	12,895	13,176	13,209	13,311	13,298	+856	+0.27	
Riverwood	5,885	6,397	6,536	6,585	6,643	6,630	+744	+0.48	
Sans Souci	2,729	2,904	2,900	2,908	2,891	2,884	+155	+0.22	
South Hurstville	5,429	5,399	5,359	5,448	5,745	6,072	+642	+0.45	
Hurstville (suburb)	30,903	33,909	36,324	39,193	41,931	44,161	+13,258	+1.44	

Source: Population and household forecasts, 2021 to 2046, prepared by id (informed decisions), October 2023.

The population continues to age, as can be seen in Figure 3, although the distribution is uneven, with the more established areas showing a greater ageing trend.

Forecast age structure - 5 year age groups

Georges River Council - Total persons



Source: Population and household forecasts, 2021 to 2046, prepared by .id (informed decisions), September 2023.

Figure 3. Forecast age structure, 2021-2046.

This age structure differs from the previous forecast, with fewer additional young children (0-4), however the general trend for an increase in older cohorts remains (60+).

1.3 Differences between the Population Forecast adjustment and the Evidence Paper

Methodology

The population forecast and Evidence Paper have different purposes and have used different methodologies to come to their conclusions. The population forecast has identified total assumed take up of dwellings over a 25-year period, consisting of identified Major sites (those 'with Approval', and those in 'Activity Centres') and has adopted the assessment of non-specific supply and infill from the Evidence paper to construct an assumption of a supply-demand balance.

The Evidence paper has calculated an assessment of non-specific supply, based on cadastral analysis and assessed overall attractiveness of an area for development. Major sites are excluded from the evidence base calculations but are integral to the forecast assumptions. As the forecast process assumes that major sites are highly likely to develop, typically a higher yield will be

obtained than the evidence base process which assumes a general development yield over a zone in a small area.

Although the updated forecast changes the number of assumed net additional dwellings as estimated in Chapter 7.4 of the Evidence Paper, the general trend will remain the same – lower density will be replaced with higher density.

A small number of major sites contribute significantly to the total including:

- Beverly Hills Master Plan study area (607 dwellings assumed)
- Mortdale Masterplan Core Study area (404 dwellings assumed in total, with 2 sites within this area already identified as progressing)
- Hurstville Westfield (456 dwellings assumed)
- East Quarter “Beyond” (392 dwellings)
- 9 Gloucester Road (350 dwellings)
- Kogarah Railway Redevelopment (288 dwellings)

In addition, the 3 precincts identified in the Kogarah New City Plan assume approximately 1,750 additional dwellings (some already under construction, or with approved Development Applications).

These 6 sites, plus the Kogarah New City Plan assumed developments account for approximately 4,200 dwellings, or just under half of the 8, 547 major site dwelling count assumptions.

The forecast adjustment adopted the capacity calculations as presented in the evidence base as unidentified supply and infill, with an allowance made to avoid double counting.

Results

As the forecast has been updated and informed by more recent evidence, the specific conclusions made by the evidence paper based on the pre-September forecast will be different to those in the September update.