



*cutting through complexity™*

# **Local Government Association of NSW Annual Conference 2011**

## **Local Councils' Role in Envisioning a Better Way to Live in the 21<sup>st</sup> Century**

**Bernard Salt**

**24 October 2011**

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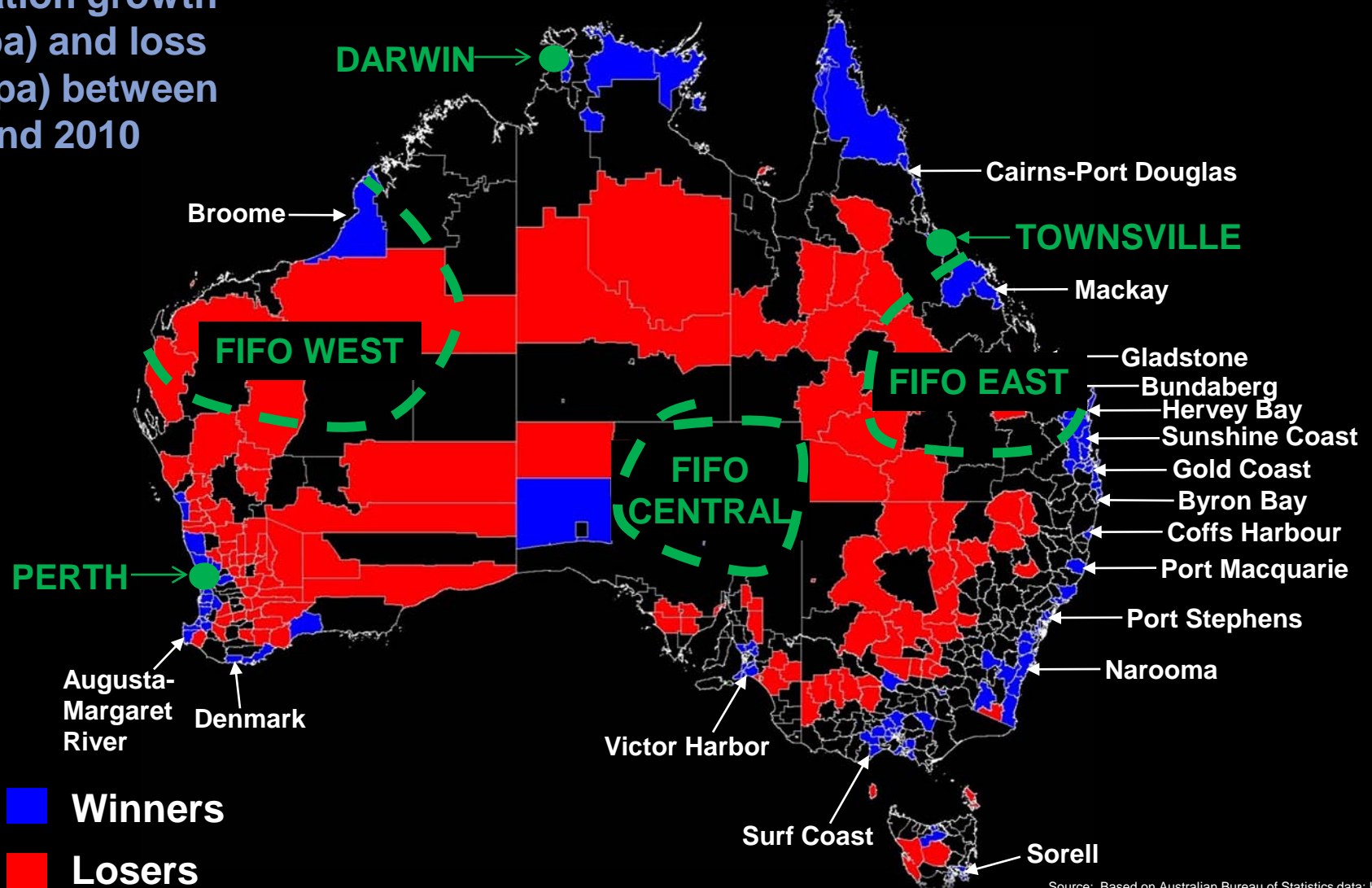
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# Australians are on the move ... to the coast

Areas of high population growth (>2% pa) and loss (<-1% pa) between 1986 and 2010



Source: Based on Australian Bureau of Statistics data; KPMG

# Out-migration from NSW has slowed as has overseas immigration ... will these trends reverse within 3 years?

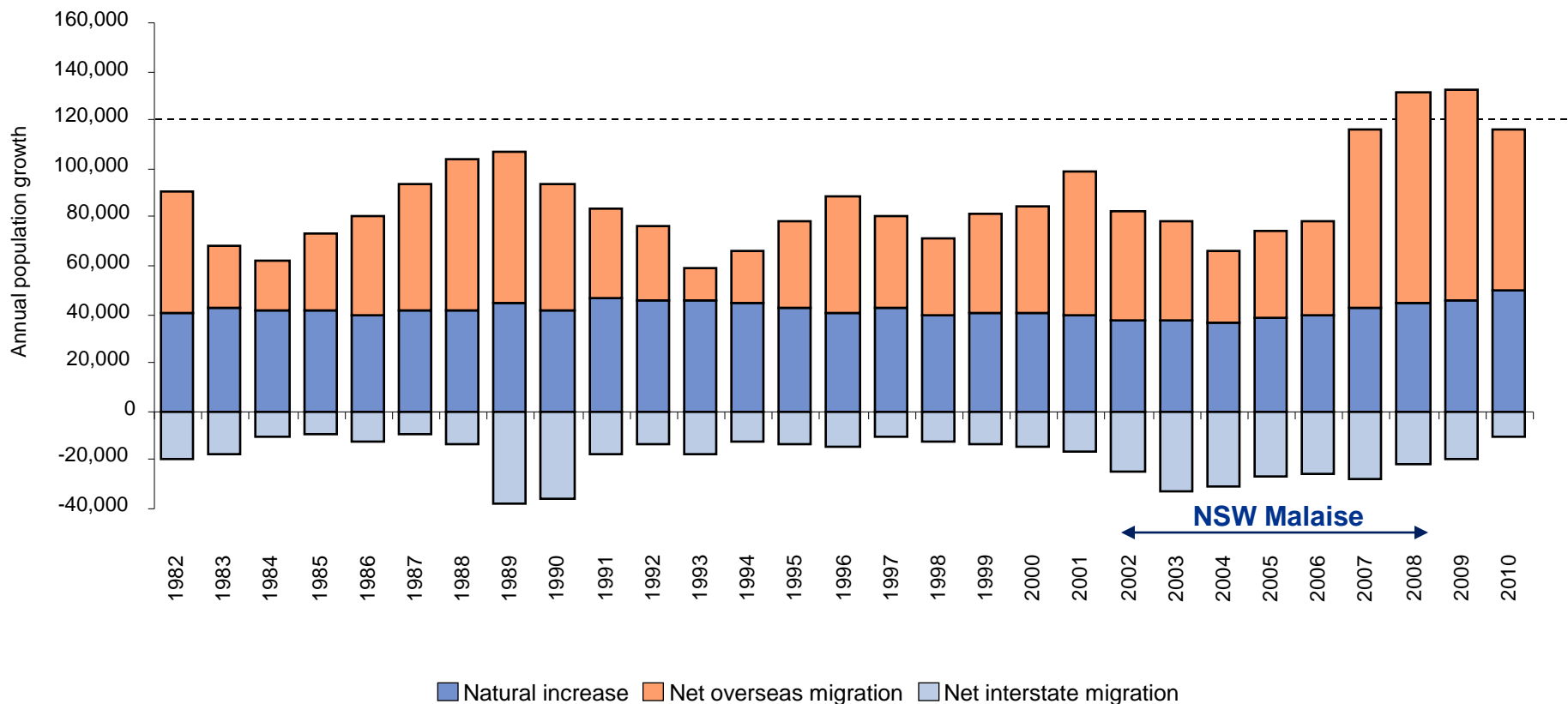
5.83m

6.49m

7.20m

← 3.17m @ 1950

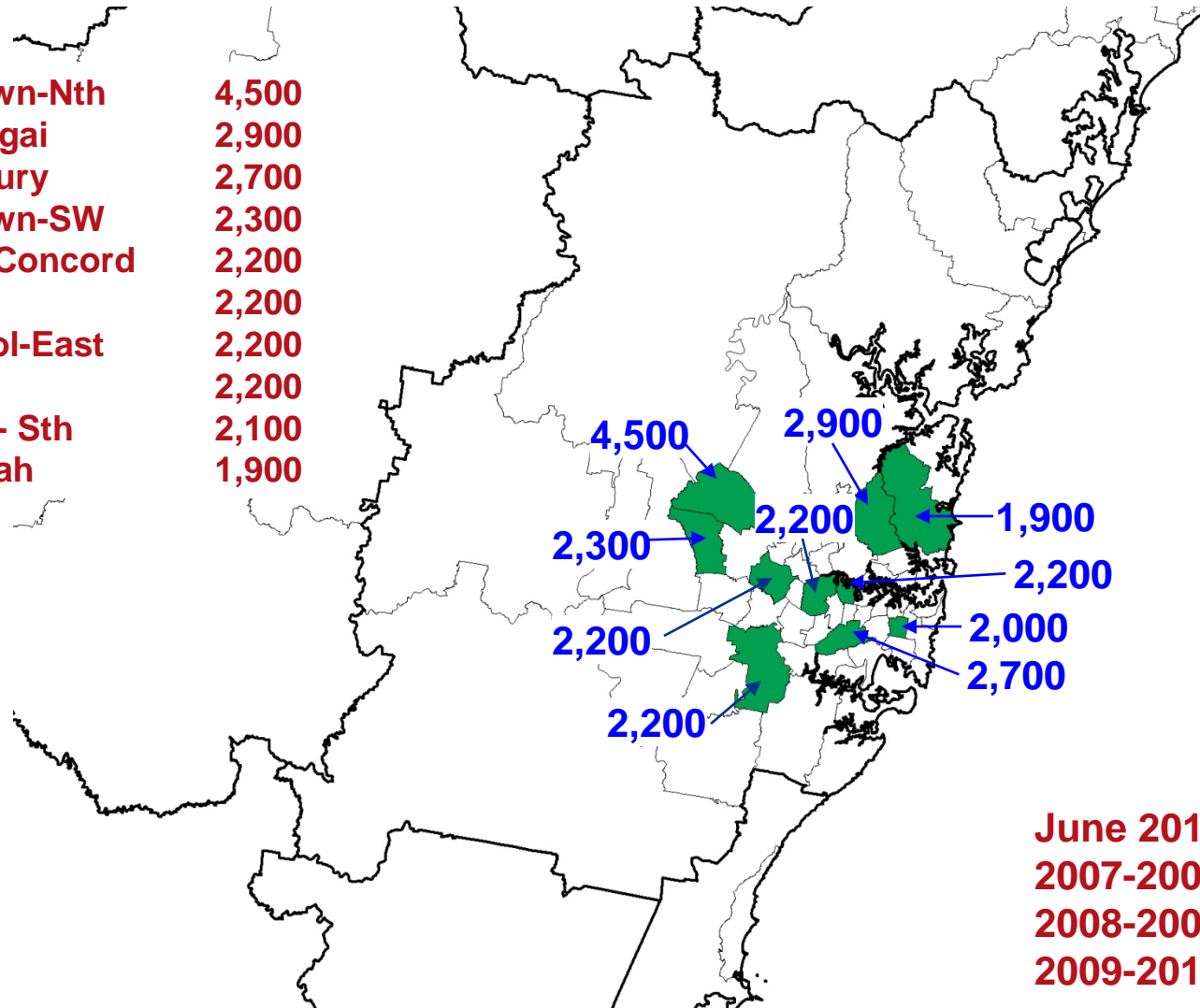
9.89m @ 2050 →



## • Components of population growth in NSW between 1982 and 2010

# The fastest growing parts of Sydney are no longer the edges but the middle and inner suburbs

|                        |              |
|------------------------|--------------|
| <b>Blacktown-Nth</b>   | <b>4,500</b> |
| <b>Ku-ring-gai</b>     | <b>2,900</b> |
| <b>Canterbury</b>      | <b>2,700</b> |
| <b>Blacktown-SW</b>    | <b>2,300</b> |
| <b>C. Bay- Concord</b> | <b>2,200</b> |
| <b>Holroyd</b>         | <b>2,200</b> |
| <b>Liverpool-East</b>  | <b>2,200</b> |
| <b>Auburn</b>          | <b>2,200</b> |
| <b>Sydney - Sth</b>    | <b>2,100</b> |
| <b>Warringah</b>       | <b>1,900</b> |



**June 2010: 4.575m**  
**2007-2008: 74,000**  
**2008-2009: 81,000**  
**2009-2010: 76,000 or 1.7%**

# Australia is shifting from Mediterranean to Asian influences

| <b>Growing</b>  | <b>Extra</b> | <b>2010</b> |
|-----------------|--------------|-------------|
| 1. India        | 245,000      | 341,000     |
| 2. China        | 232,000      | 380,000     |
| 3. New Zealand  | 175,000      | 544,000     |
| 4. South Africa | 75,000       | 156,000     |
| 5. Philippines  | 67,000       | 177,000     |

| <b>Contracting</b> | <b>Loss</b> | <b>2010</b> |
|--------------------|-------------|-------------|
| 1. Italy           | -26,000     | 216,000     |
| 2. Greece          | -7,000      | 127,000     |
| 3. Poland          | -7,000      | 58,000      |
| 4. Malta           | -4,000      | 49,000      |
| 5. Netherlands     | -3,000      | 89,000      |

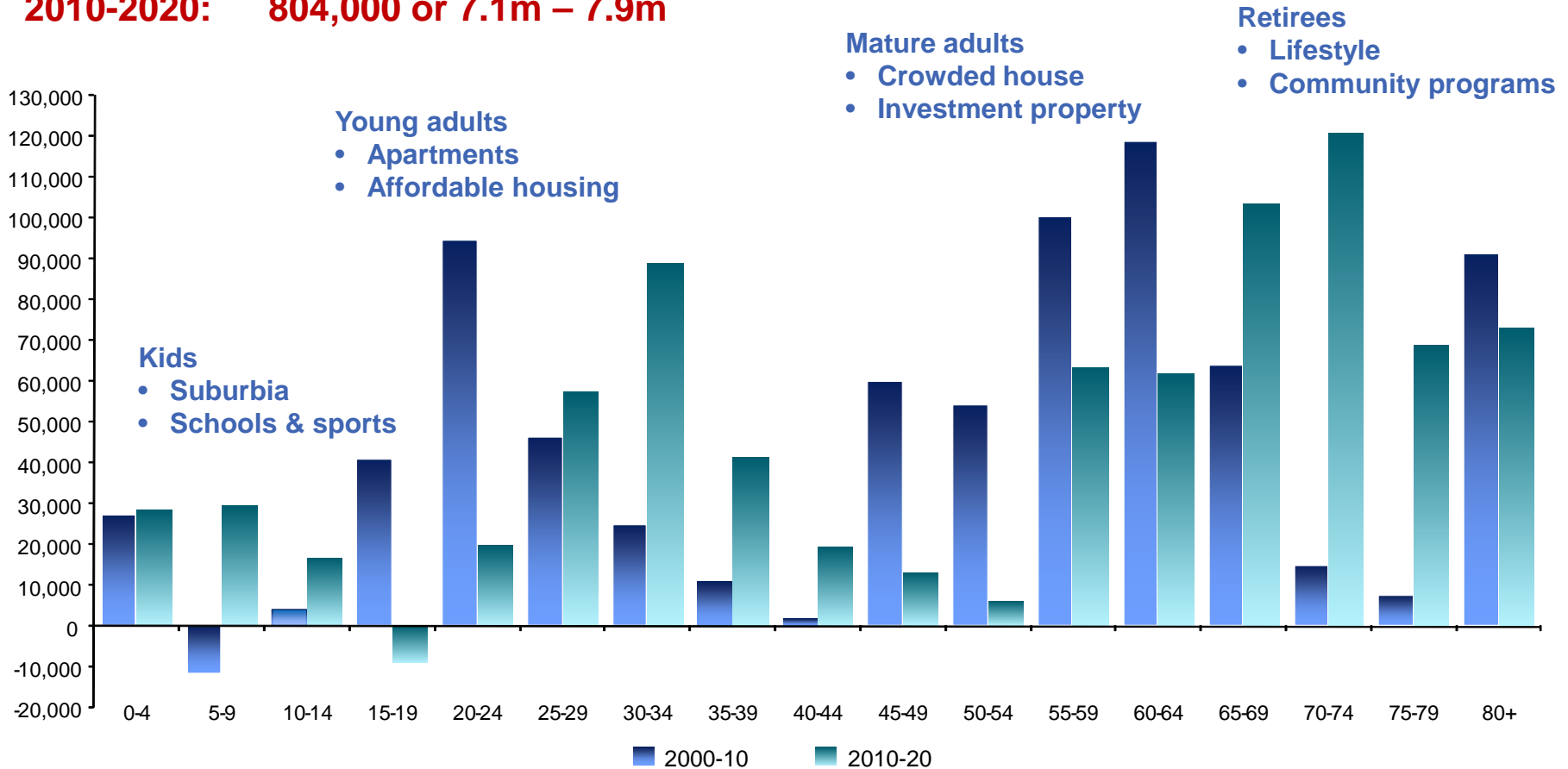
- Most growth and loss by place of birth in Australia, 2000 - 2010

# Other tribes on the rise ...

- **Facebook ...**
- **PUMCINS ....**
- **NETTELS ...**
- **KIPPERS ...**
- **LOMBARDs ...**

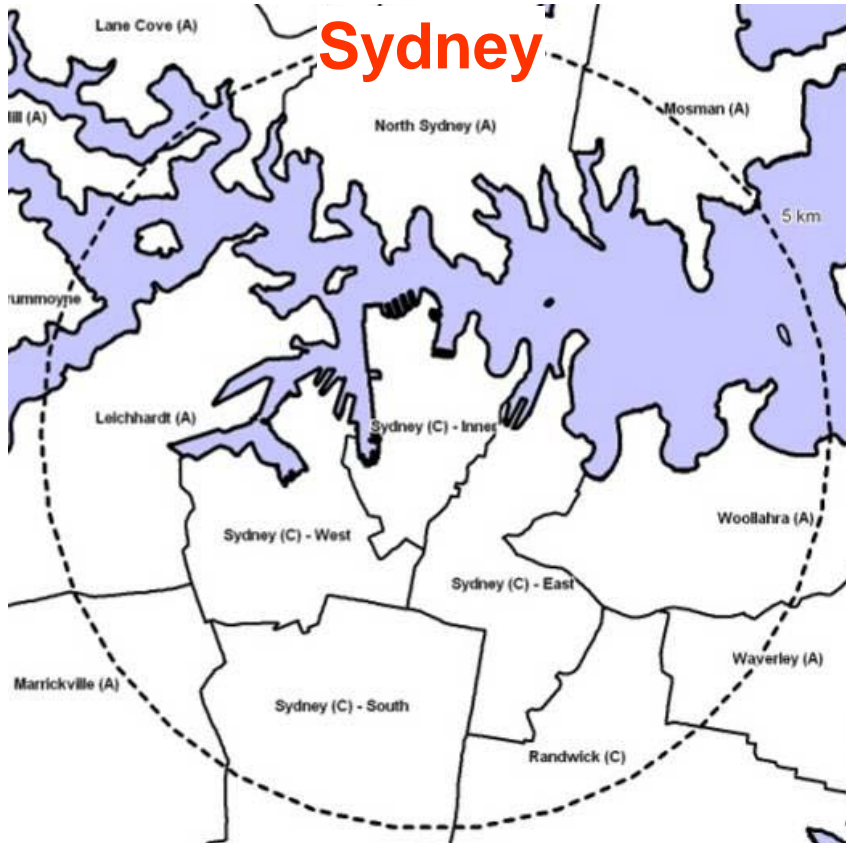
# NSW local government must deliver services to surge points over the next decade

**2000-2010: 753,000 or 6.5m – 7.1m**  
**2010-2020: 804,000 or 7.1m – 7.9m**

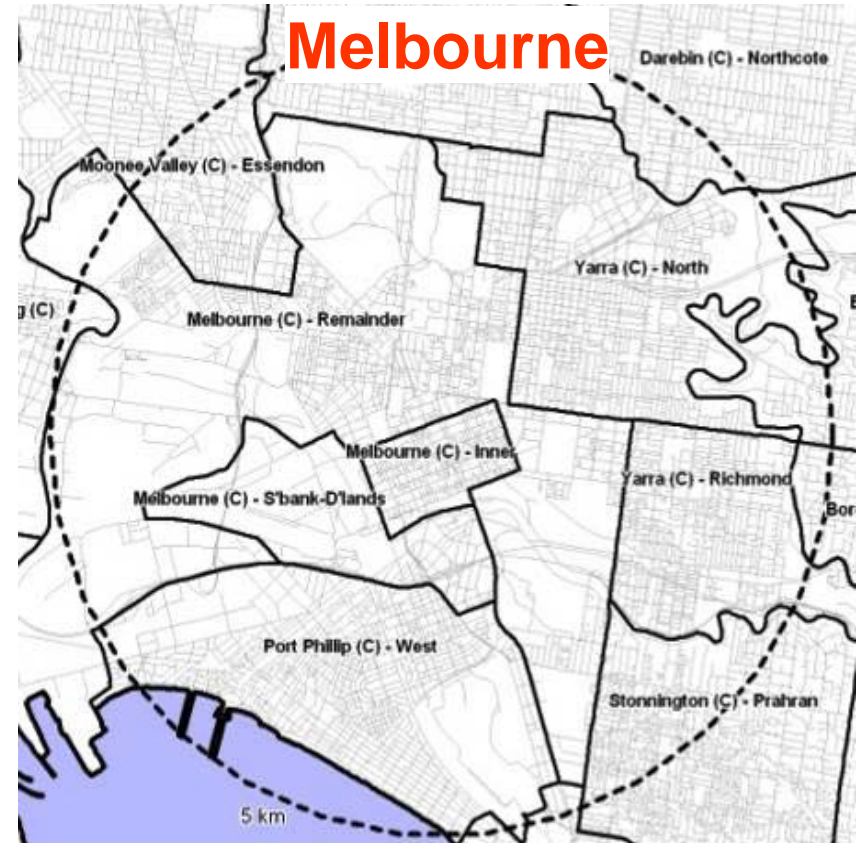


- Net change in New South Wales population by 5-year age group over 10 years to 2010 and 10 years to 2020

# Lifestyle shifts has prompted demand for inner city living in Melbourne and Sydney

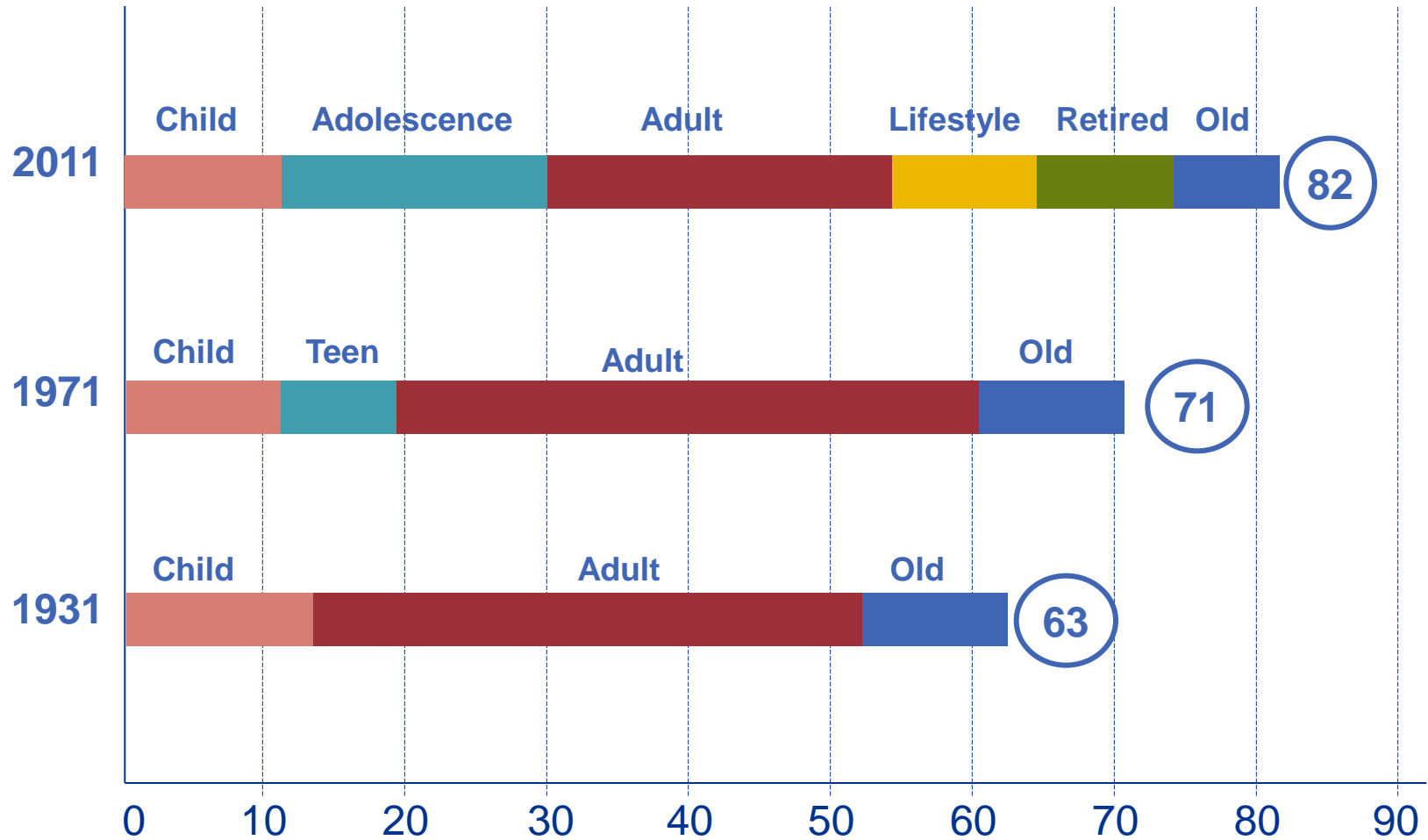


- Population June 2010 was 354,000 up 66,000 over 10 years and 7,000 over 12 months



- Population June 2010 was 272,000 up 74,000 over 10 years and 6,000 over 12 months

# Increasing life expectancy is creating new stages of the lifecycle



- Change in life expectancy over 80 years in Australia

# Australia's volunteering hotspots are located in small country towns ... Sydney's are located in middle-class suburbia

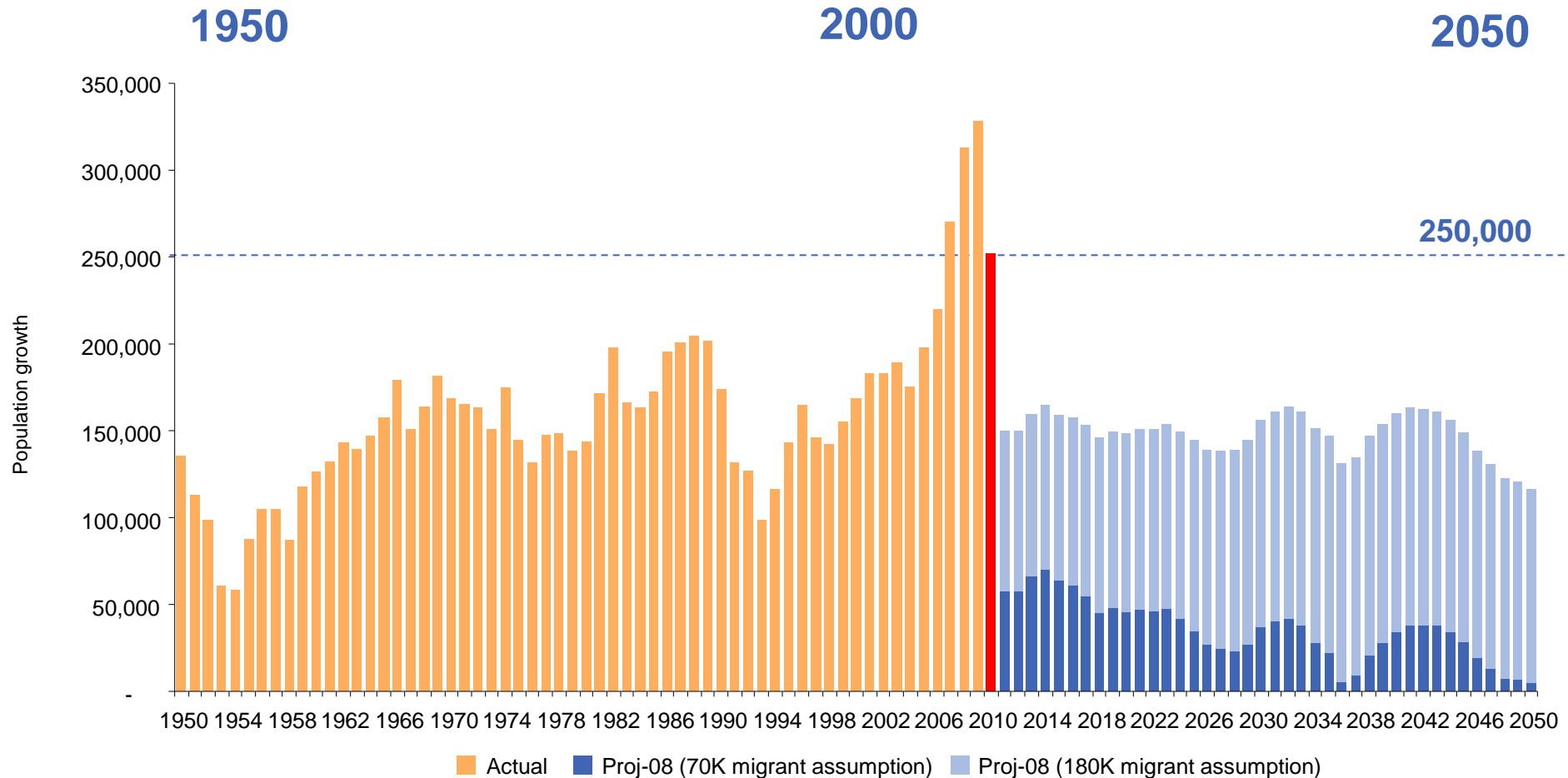
## Proportion volunteers Australia

|                   | % volunteers |
|-------------------|--------------|
| • Jamestown SA    | 42           |
| • Dimboola VIC    | 40           |
| • Tathra NSW      | 37           |
| • Longreach Qld   | 35           |
| • Exmouth WA      | 34           |
| • The Vines WA    | 13           |
| • Melton VIC      | 13           |
| • Kurri Kurri NSW | 13           |
| • Jimboomba Qld   | 16           |
| • Maitland SA     | 17           |

## Proportion volunteers Sydney

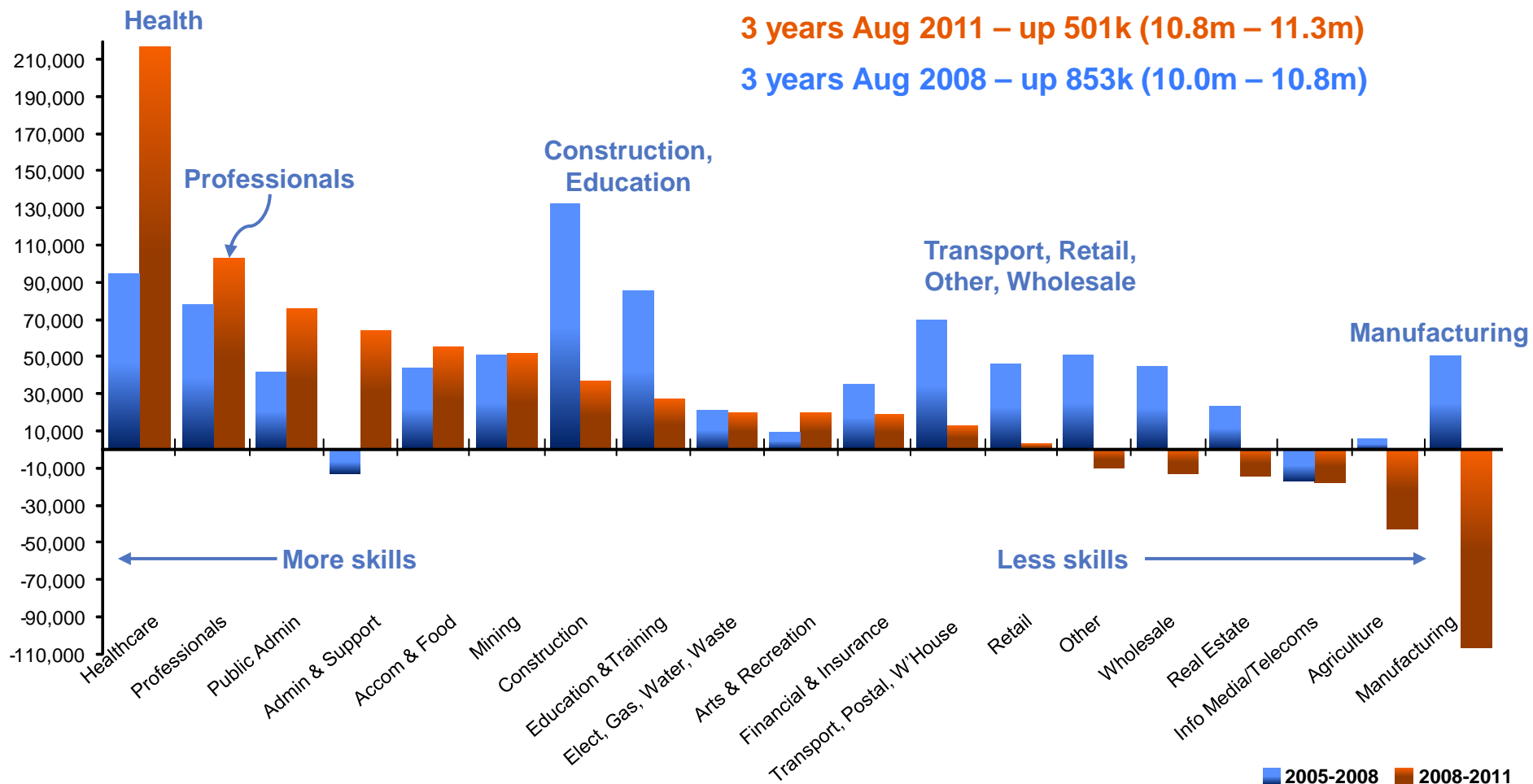
|                 | % volunteers |
|-----------------|--------------|
| • Uni of Sydney | 39           |
| • Glenbrook     | 30           |
| • Beecroft      | 30           |
| • Pittwater     | 30           |
| • Pymble        | 30           |
| • Cabramatta    | 7            |
| • Fairfield     | 8            |
| • Auburn        | 8            |
| • Bonnyrigg     | 8            |
| • Belmore       | 8            |

# Australia is moving from baby boom to baby bust ... we need either more tax or more tax payers



- Net growth in working age population (15-64) over 100 years in Australia based on 2008 outlook with different annual migration assumptions

# There has been a structural shift in the Australian economy ... less low-skilled work ... more highly-skilled work



- Net change in total jobs in Australia over two successive three-year periods, August 2005 – August 2011

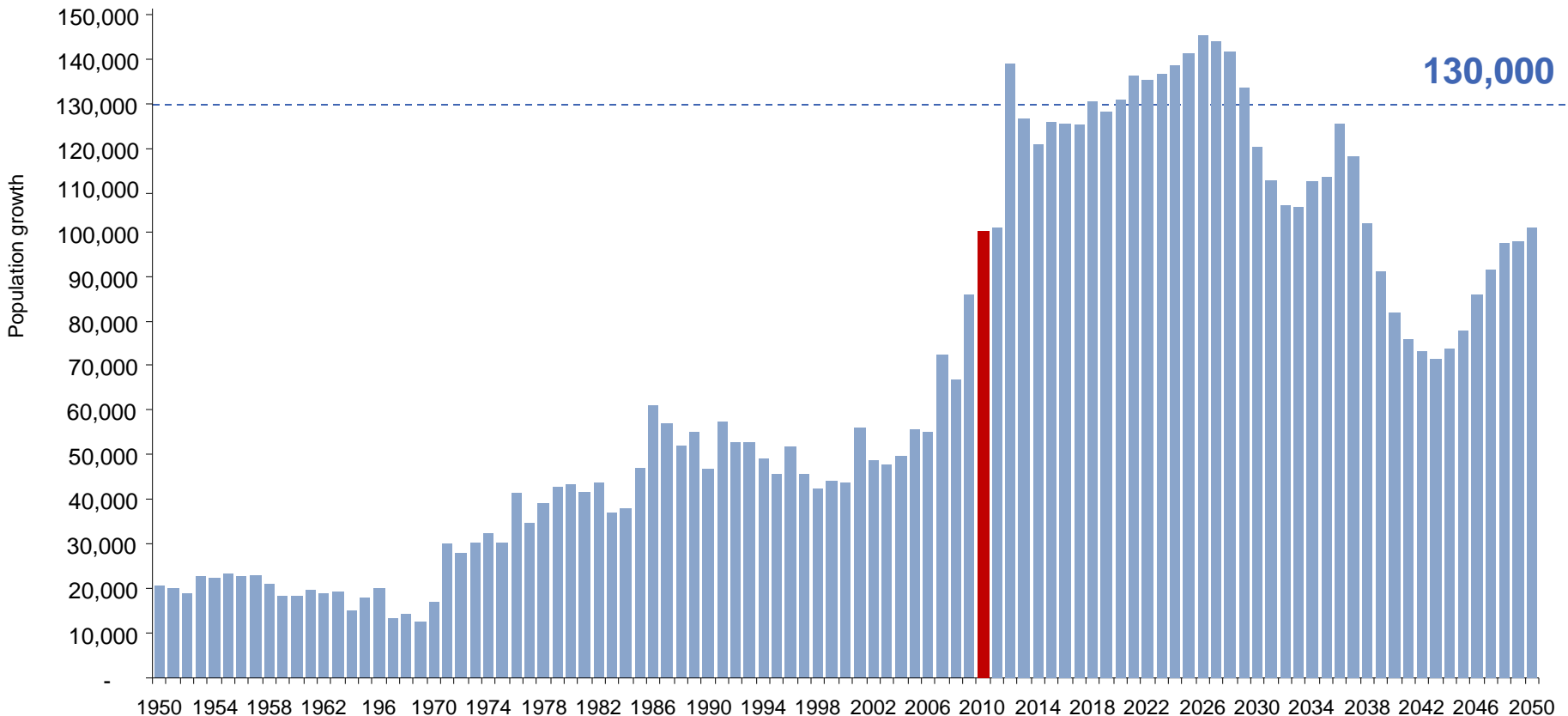
# The transition of baby boomers into early retirement will create unique challenges

1950

2000

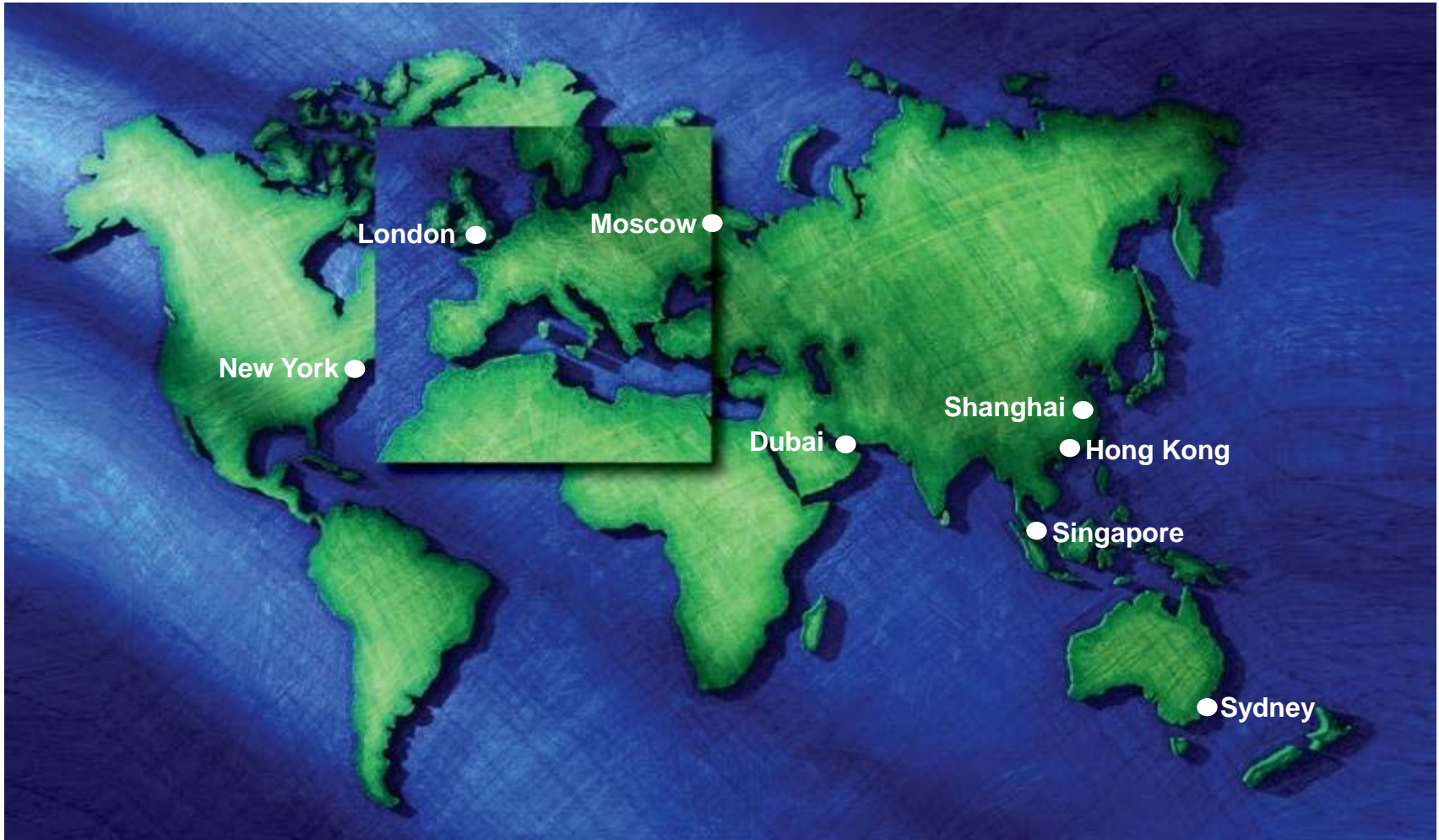
2050

130,000



- Net growth in population (65+) over 100 years in Australia

# Australia will benefit from rise of “The Dubai Effect”



# The GFC has prompted the rise of the ‘moral consumer’

## Then 1997 - 2008

- Era of high consumerism ... and of ‘corporate high-flyers’
- ‘Live for the moment’ ... pay in the future
- Plasma TVs, McMansions, Manolo Blahnik shoes
- Easy credit ... rising house prices
- Celebration of the individual ... confidence in the future and in ourselves

**Consumers driven by  
“Aspirationalism”**

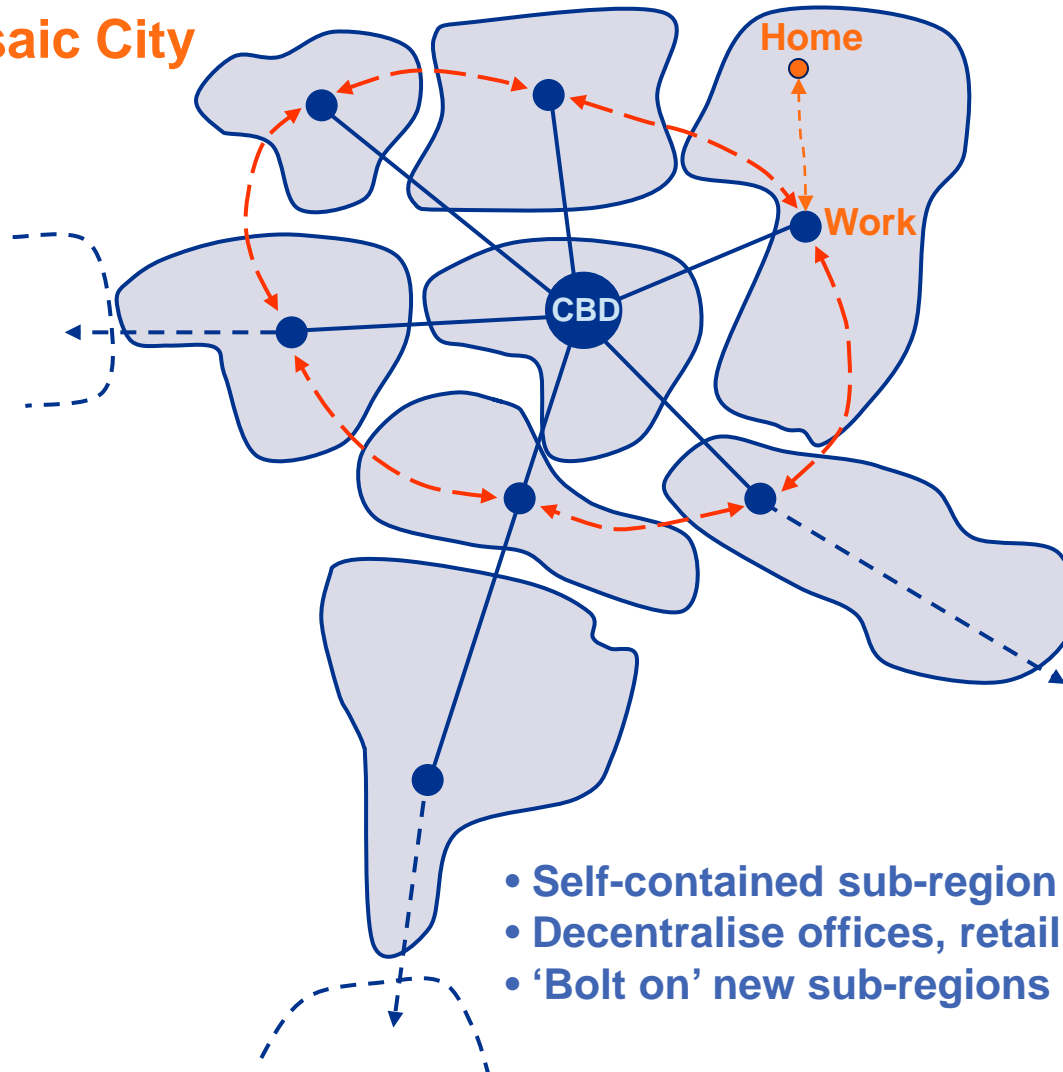
## Recession

- Rise of the moral consumer ... the new Wowserism ... seeks value on internet
- Anti-drinking, smoking, speeding, gambling, junk-food (obesity) ... concern about corporate excess
- Rise of Green, ethical & traditional values ... celebrities
- Fear drives a retreat to the security of the herd, the tribe, the family, familiar brands?

**Consumers driven by a  
“New Morality”**

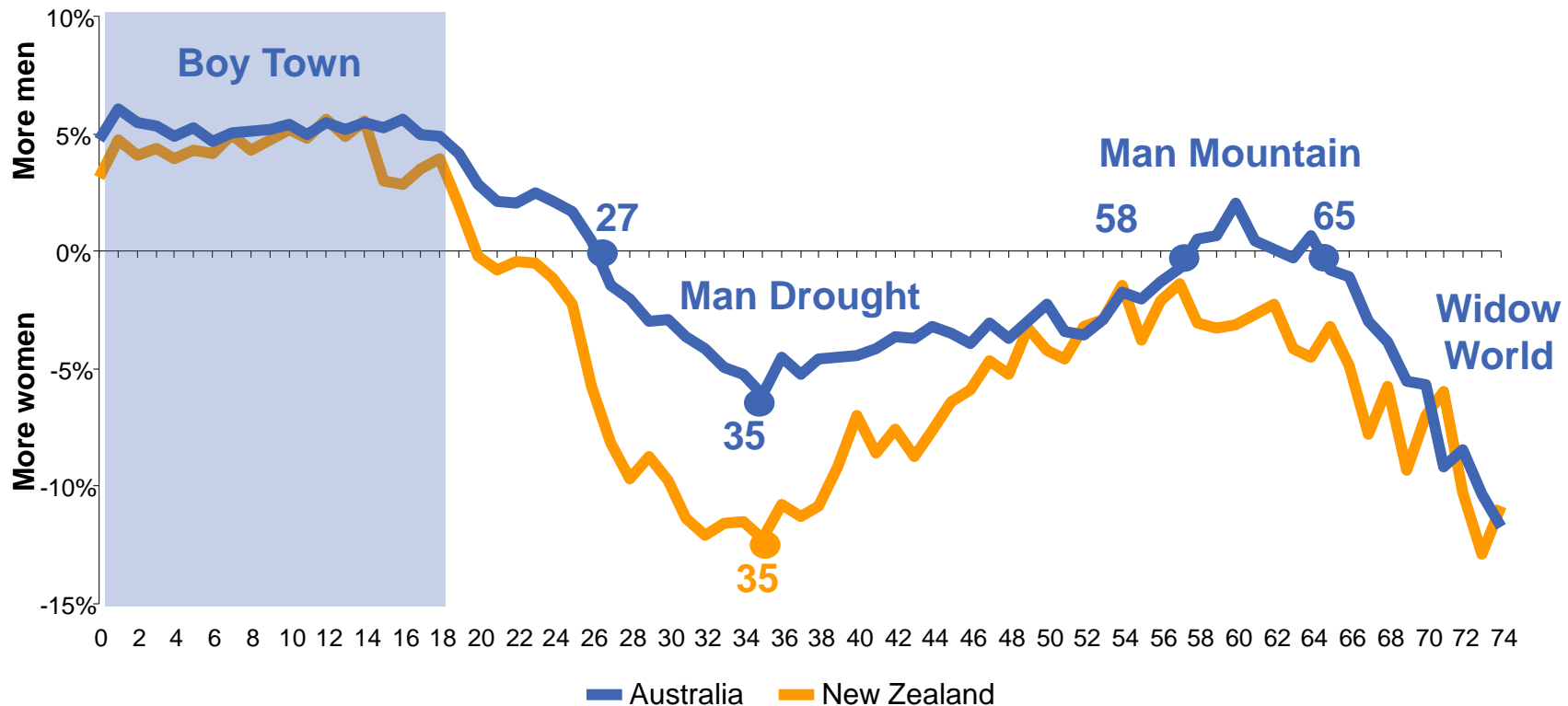
# Urban development could progress as a series of connected cells ... leads to 'Mosaic City'

## Mosaic City



- Self-contained sub-region
- Decentralise offices, retail, hospitals, universities
- 'Bolt on' new sub-regions as required

# The Great Australasian Man Drought ... Stage 3A restrictions now apply



- Percentage difference in the number of men and women in Australia and New Zealand by individual year in 2006

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