

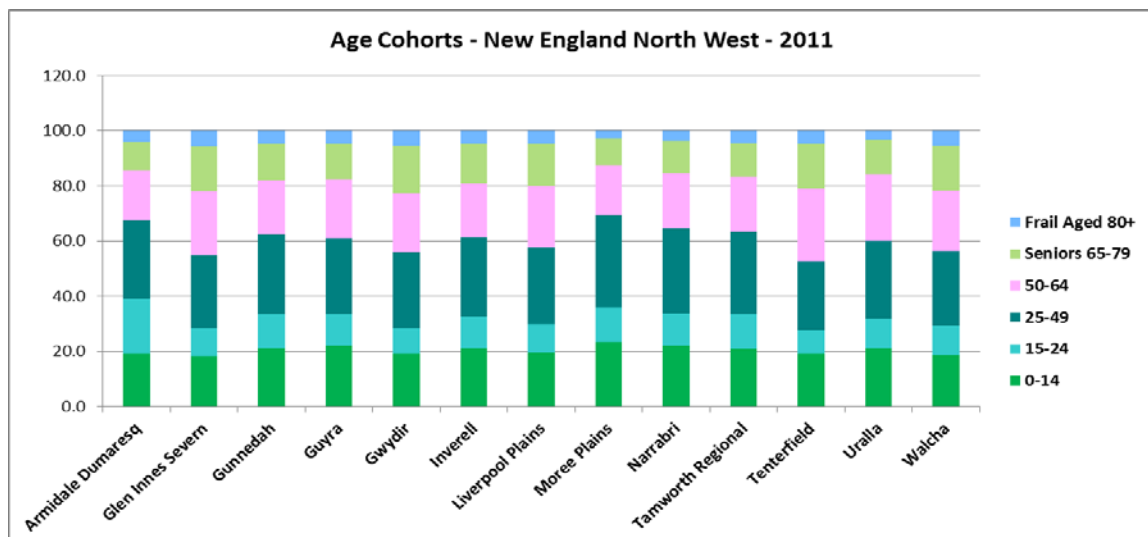
New England North West Region – What’s the Housing Demand?

Population Forecast

- The Department of Planning and Environment have prepared population and household projections for all of the local government areas in the New England North West for the period from 2011 to 2031. Forecasts vary, with Armidale Dumaresq, Tamworth Regional and Inverell having strong predicted growth rates to 2031, Gunnedah, Guyra, Liverpool Plains, Tenterfield and Uralla predicted to have modest growth and Glen Innes Severn, Gwydir, Moree Plains, Narrabri and Walcha predicted to decline.

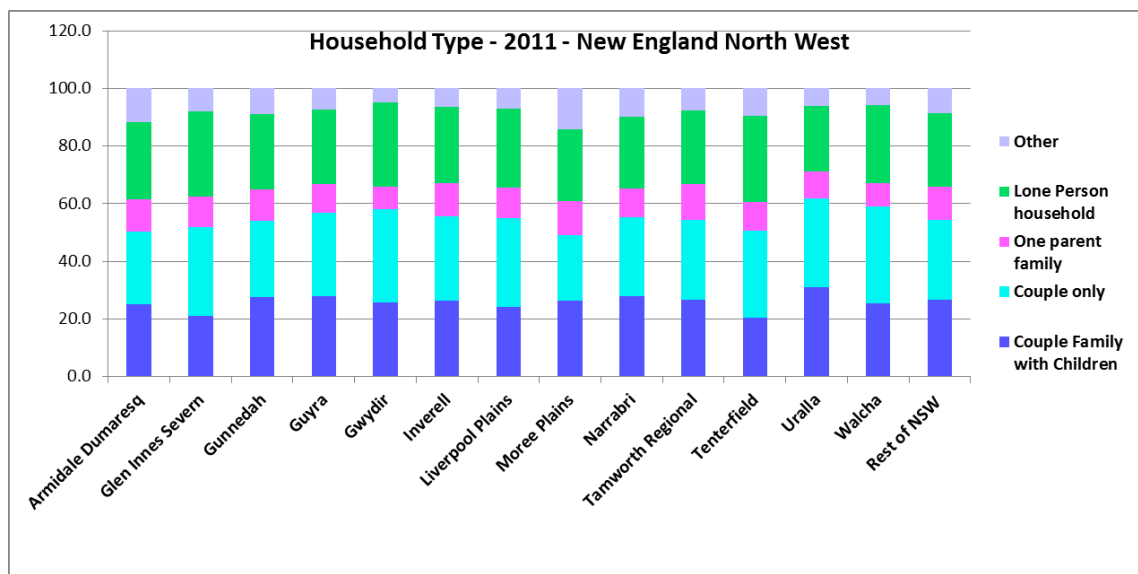
Age

- The median age of the population in each of the thirteen LGAs comprising the New England North West region has increased from 2001 to 2011 and ranges between 35 years (Armidale-Dumaresq and Moree Plains) and 47 (Tenterfield). Five LGAs (Armidale Dumaresq, Gunnedah, Moree Plains, Narrabri and Tamworth Regional) have a lower median age than the average for the Rest of NSW (excluding the Sydney Statistical Division) of 41 years, while six have a higher median (Glen Innes Severn, Gwydir, Liverpool Plains, Tenterfield, Uralla and Walcha) and two (Guyra and Inverell) are right on average.
- There is diversity between the LGAs in this region in the age profile of their communities:
 - Half of the New England North West LGAs (Gunnedah, Guyra, Inverell, Moree Plains, Narrabri, Tamworth Regional and Uralla) have higher proportions of children (0-14) than the average for the Rest of NSW, while the rest have a lower proportion (Armidale Dumaresq, Glen Innes Severn, Gwydir, Liverpool Plains, Tenterfield and Walcha).
 - Armidale Dumaresq is the only LGA in the region to have a higher proportion of 15-24 year olds than the Rest of NSW average (19.9% compared to 12.6% thanks largely to the presence of the University of New England).
 - Only Moree Plains and Narrabri have a higher proportion of 25-49 year olds.
 - Half of the regions LGAs (Glen Innes Severn, Guyra, Gwydir, Liverpool Plains, Tenterfield, Uralla and Walcha) have a higher proportion of 50-64 year olds (with the remaining LGAs having a lower proportion).
 - Glen Innes Severn, Guyra, Gwydir, Inverell, Tenterfield and Walcha have a higher proportion of seniors (65 – 79 years)
 - Glen Innes Severn, Guyra and Walcha also have a higher proportion of frail aged (80+).
- This suggests that a range of housing is required to meet the needs of the community, including family homes, student housing and housing suitable for seniors and frail aged.
- The DPE forecast a strong increase in residents aged over 65 across this region. The graph below shows the key age cohorts for each LGA in the region at the 2011 Census.



Household Type

- There has been a decline in the proportion of couple families with children in every LGA in New England North West between 2001 and 2011. This is in line with the trend for the Rest of NSW but the decline was much stronger in every LGA in this region than for the Rest of NSW.
- Against the trend in the Rest of NSW, the proportion of couple households declined in seven of the thirteen New England North West region LGAs (Gwydir, Gunnedah and Guyra had the strongest declines, followed by Walcha, Tenterfield, Glen Innes Severn and Narrabri).
- The proportion of lone person households increased in almost every New England North West LGA (excepting very small declines in Tenterfield, Narrabri and Gunnedah) as for the Rest of NSW.
- Couple families with children comprise the largest household type in a minority of New England North West LGAs – Gunnedah, Guyra, Narrabri, Tamworth Regional and Uralla. Couple only households comprise the largest household type in eight of the thirteen LGAs in the region – Glen Innes Severn, Guyra, Gwydir, Inverell, Liverpool Plains, Tenterfield, Uralla and Walcha.. Lone person household comprise the largest household type in nine LGAs – Armidale Dumaresq, Glen Innes Severn, Gunnedah, Guyra, Gwydir, Inverell, Liverpool Plains, Tenterfield and Walcha. Overall, lone person and couple households combined comprise between 48.1% (Moree Plains) and 61.6% (Gwydir) of all households across the region.
- The DPE forecast to 2031 that there will be strong increases in couple only and lone person households to 2031 in every New England North West LGA with forecast growth. Couple family households are forecast to grow in Armidale Dumaresq, Tamworth Regional and Inverell and are forecast to decline in all the remaining LGAs.
- This data should be compared with the data on bedroom number to determine if there is a good fit between household types and housing stock.
- Although there should be plenty of housing suitable for families of different sizes, there is also a need for a variety of dwellings with different bedroom numbers to suit couples and single person households.
- The graph below shows the proportion of the population in each of the key household types in each of the New England North West region local government areas (LGAs) at the 2011 Census.



Household Size

- In the New England North West region, seven LGAs have a higher average household size than for Rest of NSW (2.4 persons) while six LGAs have a Rest of NSW average or lower average household size. Across the region, average household size ranges between 2.3 persons per household (in Glen Innes Severn, Gwydir and Tenterfield) and 2.6 (in Uralla). Since 1996, average household size has declined in every LGA in the region in line with the trend for the Rest of NSW.
- The table below gives the average household size in all New England North West region LGAs for 1996, 2001, 2006 and 2011.

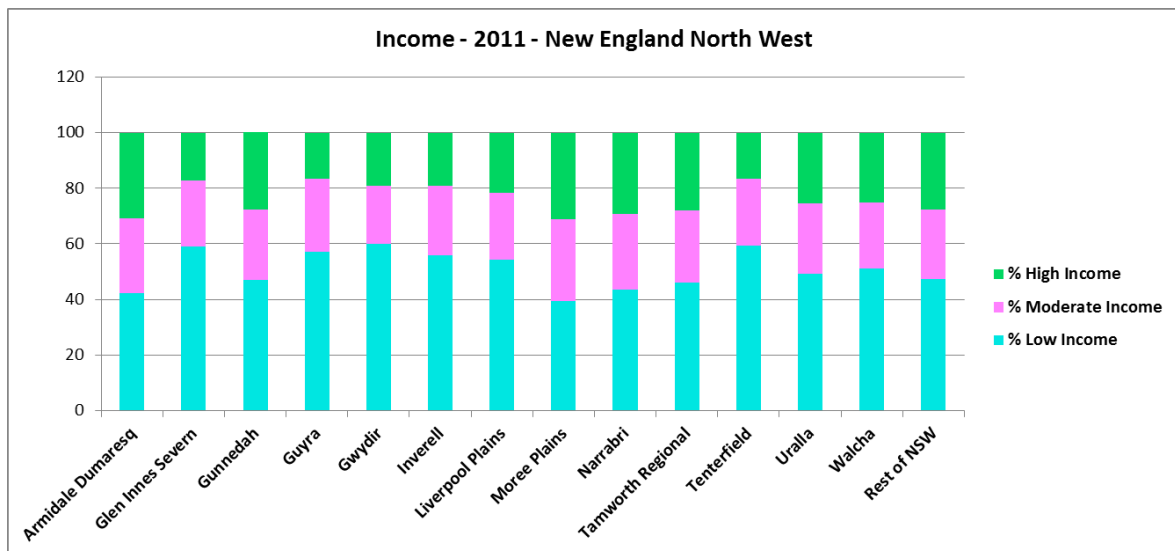
Area	Average Household Size 1996	Average Household Size 2001	Average Household Size 2006	Average Household Size 2011
Armidale Dumaresq	2.60	2.50	2.50	2.40
Glen Innes Severn	2.50	2.40	2.40	2.30
Gunnedah	2.70	2.60	2.50	2.50
Guyra	2.70	2.60	2.60	2.50
Gwydir	2.60	2.50	2.40	2.30
Inverell	2.60	2.50	2.50	2.50
Liverpool Plains	2.50	2.40	2.40	2.40
Moree Plains	2.80	2.70	2.70	2.50
Narrabri	2.70	2.60	2.50	2.50
Tamworth Regional	2.60	2.60	2.50	2.50
Tenterfield	2.50	2.40	2.40	2.30
Uralla	2.70	2.60	2.60	2.60
Walcha	2.60	2.50	2.50	2.40
Rest of NSW	2.70	2.50	2.50	2.40

FACS Local Government Housing Kit Database- Source: ABS, Analysis FACS

Income

- As for the Rest of NSW, in every New England North West LGA low income households comprise the largest proportion of all households. The proportion of low income households in this region ranges between 60.0% in Gwydir and 39.4% in Moree Plains. Armidale, Gunnedah, Moree Plains, Narrabri and Tamworth Regional all have a lower proportion of low income households than the Rest of NSW average of 47.3%, while all the remaining LGAs have a higher proportion.
- Between 2006 and 2011 the actual number of low income households increased in the majority of New England North West LGAs, excepting Gunnedah, Gwydir, Narrabri and Walcha. Of these four, Gwydir, Narrabri and Walcha all lost population. Gunnedah has a significant proportion employed in the mining sector and has experienced an influx of more highly paid mine workers, as has Narrabri.
- Five of the thirteen LGAs in this region (Guyra, Tamworth Regional, Glen Innes Severn, Inverell and Tenterfield) had a higher proportional increase in low income households than the Rest of NSW average of 3.8%, while Armidale Dumaresq has the same proportion (3.8%), and the remainder had a lower proportion or lost low income households.
- Overall, across the region there has been an increase in low income households. It is worth noting that in Armidale Dumaresq and Gunnedah there has been an increase in moderate income households, against the trend in the Rest of NSW (where there has been a decline in this group), and in Gunnedah, Walcha and Narrabri there has been an increase in high income households (higher than the increase in the Rest of NSW).

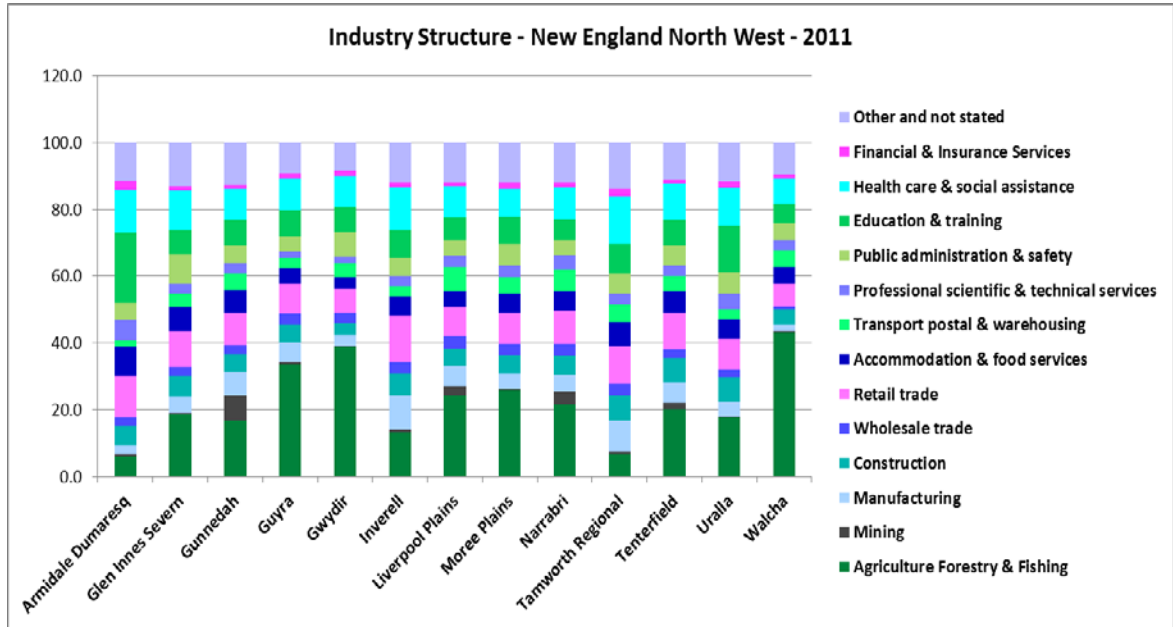
- It is important that housing supply price points show a reasonable match with household tenure and income levels. The predominance of and increase in low income households implies that the demand for affordable housing in the New England North West region is likely to be strong and increasing. This has implications for availability of affordable housing into the future.
- This data should be examined along with Housing Market data on changes in rents, house prices and rental and purchase affordability for lower income earners.
- The graph below shows the percentage distribution of low, moderate and high income households in each LGA in the New England North West region and the Rest of NSW at the 2011 Census.



Industry Structure

- A look at the industry structure of the region gives some more insight into housing market issues, in particular income and price.
- Looking at the industry structure for the New England North West, while there are a variety of industry employers across the region, it is clear that agriculture, forestry and fishing is significant, with every LGA in the region having a higher proportion working in this sector than the Rest of NSW average of 5.8%, and Gwydir having the highest proportion at 38.8%.
- Three LGAs in the region have a higher proportion employed in mining than the Rest of NSW average – Gunnedah (7.5%), Narrabri (3.9%) and Liverpool Plains (2.8%). Inverell (10.0%) and Tamworth Regional (9.3%) were the only LGAs with a higher proportion than the Rest of NSW average employed in manufacturing; Guyra, Gwydir, Inverell, Liverpool Plains, Moree Plains, Narrabri and Tamworth Regional all had a higher proportion employed in wholesale trade; Armidale Dumaresq, Inverell and Tamworth Regional had a higher proportion employed in retail trade; Armidale Dumaresq was the only LGA with a higher proportion employed in accommodation and food services, also in professional, scientific and technical services; Gunnedah, Liverpool Plains, Moree Plains, Narrabri, Tamworth Regional and Tenterfield all had a higher proportion employed in transport, postal and warehousing; Armidale Dumaresq and Tamworth Regional had a higher proportion employed in information, telecommunication and media services and also in financial and insurance services; Inverell and Tamworth Regional had higher proportions employed in rental hiring and real estate services; Glen Innes and Gwydir had higher proportions employed in public administration and safety; Armidale Dumaresq, Tamworth Regional and Uralla had higher proportions employed in education and training; Inverell and Tamworth Regional had higher proportions employed in health care and social assistance.
- Every LGA in the region had lower proportions employed in electricity, gas and water services; construction; administrative and support services; arts and recreation services than the rest of NSW average.

- The graph below shows the key industry categories in New England North West at the 2011 Census.



Homelessness

The table below shows the number of homeless people in the New England North West region according to the 2011 Census. This is one indicator of unmet housing demand.

2011	Total Homeless
Armidale Dumaresq	191
Glen Innes Severn	20
Gunnedah	14
Guyra	3
Gwydir	8
Inverell	52
Liverpool Plains	18
Moree Plains	98
Narrabri	45
Tamworth Regional	116
Tenterfield	29
Uralla	9
Walcha	4
TOTAL	607

Additional Data

More detailed housing data and tables used in this Snapshot are available from the Local Government Housing Kit Database on the Housing NSW website at:
<http://www.housing.nsw.gov.au/Centre+For+Affordable+Housing/NSW+Local+Government+Housing+Kit/Local+Government+Housing+Kit+Database/>

More detailed information and resources on an Ageing Population is available on the Local Government NSW website, in the Resource for an Ageing Population:
<http://www.lgnsw.org.au/policy/ageing>

More detailed information on population, household and dwelling projections is available on the Department of Planning and Environment website at:
<http://www.planning.nsw.gov.au/en-us/deliveringhomes/populationandhouseholdprojections.aspx>

More information on homelessness is available on the Housing NSW website at:
<http://www.housing.nsw.gov.au/Help+with+Housing/Homelessness/>