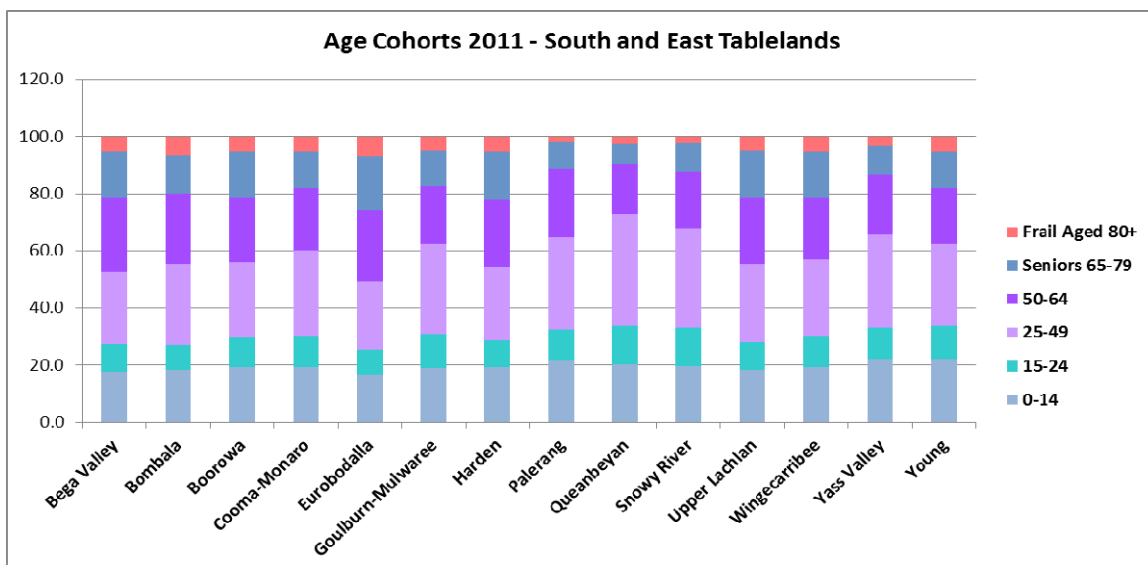


South and East Tablelands Region – What’s the housing demand?

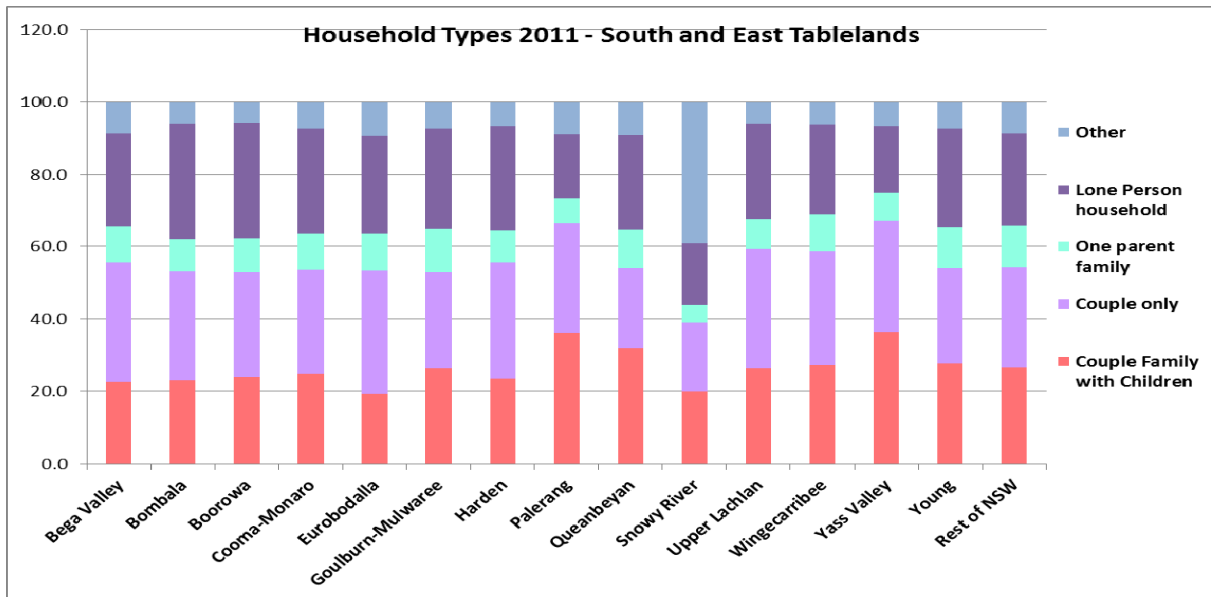
Age

- The median age of the population of the fourteen LGAs comprising the South and East Tablelands region has increased from 2001 to 2011 and ranges between 35 years (Queanbeyan) and 50 (Eurobodalla). Eight LGAs (Bega Valley, Bombala, Boorowa, Cooma-Monaro, Eurobodalla, Harden, Upper Lachlan and Wingecarribee) have a higher median age than the average for the rest of NSW (which excludes the Sydney Statistical Division) of 41 years, while four have a lower median (Queanbeyan, Snowy River, Yass Valley and Young) and two (Bombala and Upper Lachlan) are right on average. So more South and East Tablelands region LGAs have a higher median age than the average for the rest of NSW.
- There are differences in the age profile of the South and East Tablelands region LGAs:
 - Palerang, Queanbeyan, Yass Valley and Young all have higher proportions of children (0-14 year olds)
 - Queanbeyan and Snowy River have higher proportions of 15 – 24 year olds;
 - Goulburn-Mulwaree, Palerang, Queanbeyan, Snowy River and Yass Valley have higher proportions of 25 – 49 year olds
 - Bega Valley, Bombala, Boorowa, Cooma-Monaro, Eurobodalla, Harden, Palerang, Upper Lachlan and Wingecarribee have higher proportions of 50 – 64 year olds
 - Bega Valley, Boorowa, Eurobodalla, Harden, Wingecarribee and Young have higher proportions of seniors (65-79 year olds)
 - Bega Valley, Bombala, Boorowa, Eurobodalla, Harden, Wingecarribee and Young have higher proportions of frail aged (80+) than the average for the rest of NSW
- The DEP forecast that the youth dependency ratio will decrease and the aged dependency ratio will increase strongly to 2031 for almost all the South East Region LGAs, the exceptions being Boorowa, Harden, Palerang and Upper Lachlan where youth dependency ratios are relatively steady. Essentially a strong increase in residents aged over 65 across the region is predicted.



Household Type

- there has been a decline in the proportion of couple families with children in every LGA in the South and East Tablelands, with the exception of Snowy River, between 2001 and 2011. Lone person households increased in every South and East Tablelands LGA, excepting Palerang and Wingecarribee.
- while in Palerang, Queanbeyan, Snowy River and Young couple families with children comprise the largest household and family type, overall, lone person and couple households combined comprise between 36% (Snowy River) and 61% (Harden) of all households across the region, and couple parent families with children combined with single parent families comprise between 25% and 44% of all households
- household and population projections from the Department of Planning and Environment forecast to 2031 that there will be strong increases in couple only and lone person households to 2031 in every South and East Tablelands LGA with forecast growth Couple family households are anticipated to grow strongly in Queanbeyan, Palerang and Yass Valley, moderately in Goulburn-Mulwaree and are forecast to decline in all the remaining LGAs.
- there is a need for a variety of dwellings with different bedroom numbers to suit families, couples and single person households, seniors and frail aged, now and into the future and particularly studio, one and two bedroom stock for the increasing number of smaller households
- the graph below shows the proportion of the population in each of the key household types in each of the South and East Tablelands region local government areas (LGAs) at the 2011 Census.



Household Size

- in the South and East Tablelands region, Palerang, Queanbeyan, Wingecarribee, Yass Valley and Young have a higher average household size than for non metropolitan NSW (2.4 persons) while the remaining LGAs have a rest of NSW average or lower average household size. Since 1996, average household size has declined in almost every LGA in the region (excepting Queanbeyan and Yass Valley which have remained steady), in line with the trend for the rest of NSW
- the table below gives the average household size in all the South and East Tablelands 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
Bega Valley	2.60	2.50	2.40	2.30
Bombala	2.50	2.40	2.30	2.20
Boorowa	2.50	2.50	2.40	2.30
Cooma-Monaro	2.60	2.50	2.40	2.30
Eurobodalla	2.40	2.30	2.30	2.30
Goulburn-Mulwaree	2.60	2.50	2.40	2.40
Harden	2.60	2.50	2.40	2.40
Palerang	2.80	2.70	2.70	2.70
Queanbeyan	2.50	2.60	2.60	2.50
Snowy River	2.50	2.50	2.40	2.40
Upper Lachlan	2.70	2.60	2.50	2.40
Wingecarribee	2.70	2.60	2.50	2.50
Yass Valley	2.70	2.70	2.70	2.70
Young	2.60	2.60	2.50	2.50
Rest of NSW	2.70	2.50	2.50	2.40

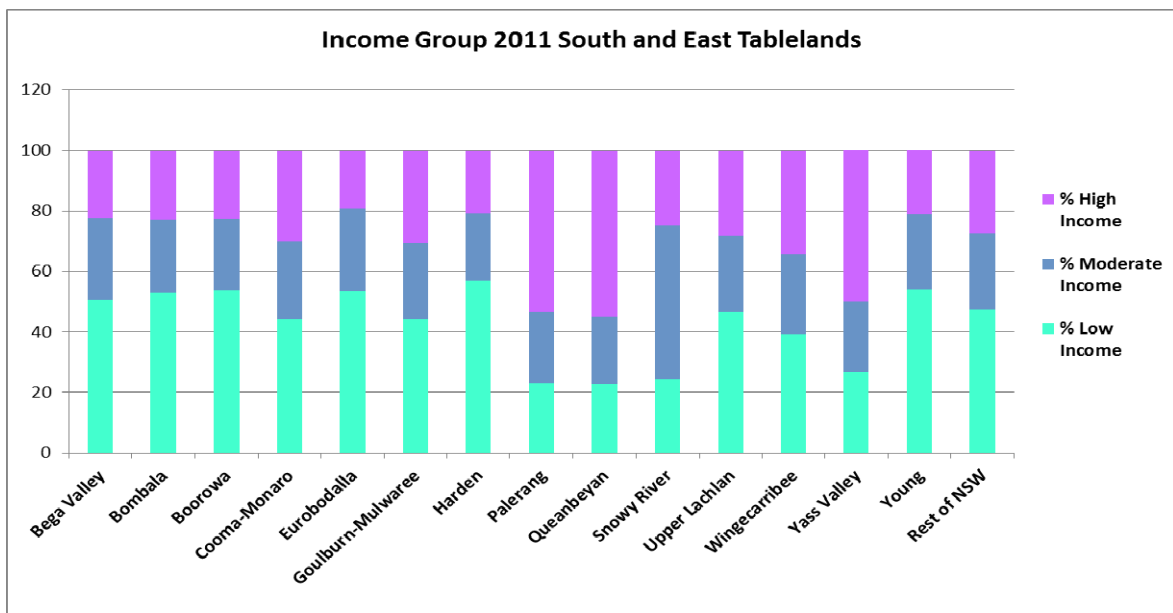
FACS Local Government Housing Kit Database- Source: ABS, Analysis FACS

Income

- with the exception of Palerang, Queanbeyan, Snowy River and Yass Valley, in all the South and East Tablelands LGAs, low income households comprise the largest proportion of all households. In Palerang, Queanbeyan and Yass Valley, high income households comprise the largest proportion of all households, while in Snowy River it is moderate income households. Bega Valley, Bombala, Boorowa, Eurobodalla, Harden and Young have a higher proportion of low income households than the average for the rest of NSW of 47.3%
- between 2006 and 2011 the number of low income households increased in every South and East Tablelands region LGA, excepting Palerang, Queanbeyan, Upper Lachlan and Yass Valley
- almost all the LGAs in this region had a stronger increase in low income households than the average for the rest of NSW of 3.8% (for example Wingecarribee 11.3% increase in low income households between 2006 and 2011, Goulburn-Mulwaree 8.2%, Bega Valley 6.7%).

In addition, around half of the LGAs had a stronger increase in low income rental households than the average for the rest of NSW of 12.1% (for example Young 30.0%, Goulburn-Mulwaree 13.3%). Given, this increase, it is important that housing supply price points show a reasonable match with household tenure and income levels

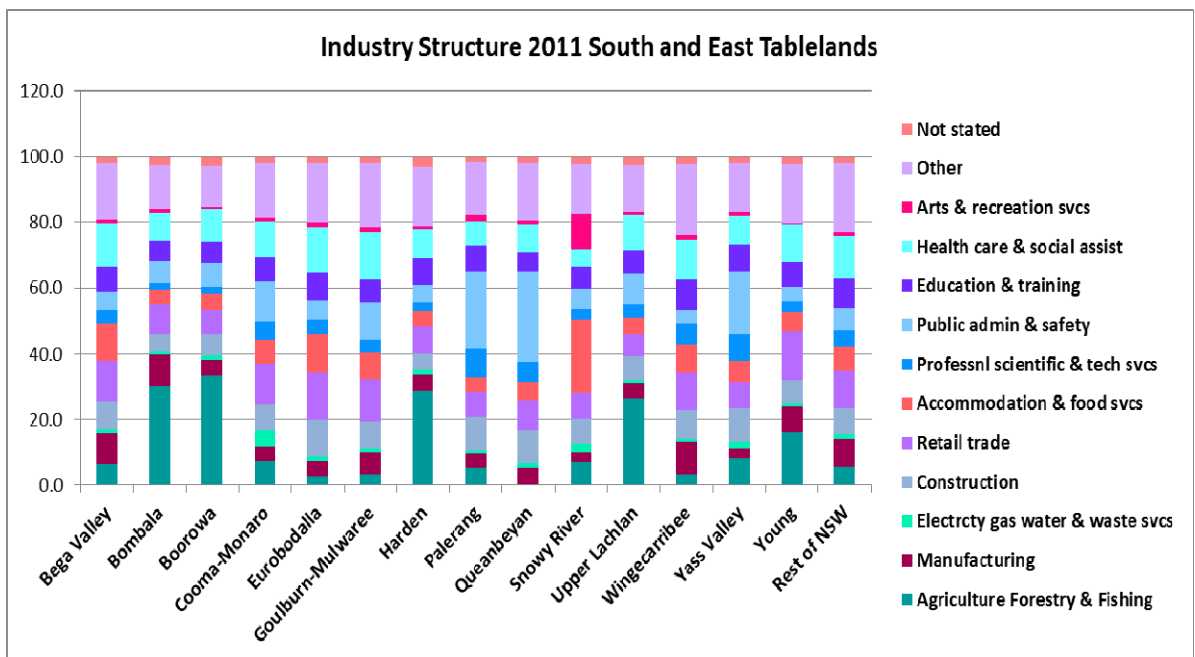
- the graph below shows the proportion of low, moderate and high income households in all the South and East Tablelands region local government areas at the 2011 Census.



Industry Structure

- it is worth looking at the industry structure of the region, to gain more insight into housing market issues, in particular income and price
- looking at the industry structure for the South and East Tablelands, while there are a variety of industry employers across the region, it is clear that agriculture, forestry and fishing is significant, with Bega Valley, Bombala, Boorowa, Cooma-Monaro, Harden, Snowy River, Upper Lachlan, Yass Valley and Young all having a higher proportion working in this sector than the Rest of NSW average of 5.8%
- public administration and safety comprises a significant proportion of employment in Palerang (23.3%), Queanbeyan (27.5%) and Yass Valley (19.1%), well above the rest of NSW average of 7.2% but not surprising given their proximity to Canberra. This also contributes significantly to the high proportion of high income households and the higher priced housing markets in these LGAs

- the significant impact of tourism on the economy of some of the LGAs in this region is evident in the high proportions employed in accommodation and food services in Snowy River (22.1%), Bega Valley (11.1%) and Eurobodalla (11.7%) in particular, well above the Rest of NSW average of 7.7%, as well as in arts and recreation services (Snowy River 10.6% compared with 1.2% in the rest of NSW)
- It is important to consider projections for future activity in the different industry sectors in the South and East Tablelands to better understand likely future demand for housing.



Homelessness

The table below shows the number of homeless people in the South and East Tablelands region according to the 2011 Census. This is one indicator of unmet housing demand.

2011	Total Homeless
Bega Valley	104
Bombala	0
Boorowa	4
Cooma-Monaro	10
Eurobodalla	79
Goulburn-Mulwaree	102
Harden	10
Palerang	23
Queanbeyan	126
Snowy River	128
Upper Lachlan	19
Wingecarribee	82
Yass Valley	18
Young	10
TOTAL	715

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/>