



cutting through complexity™

2037: Regional WA Transformed

Big Picture Issues Resulting from Demographic Change in Regional WA

Bernard Salt

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Overseas migration is recovering in Western Australia ... labour required to support the resources boom

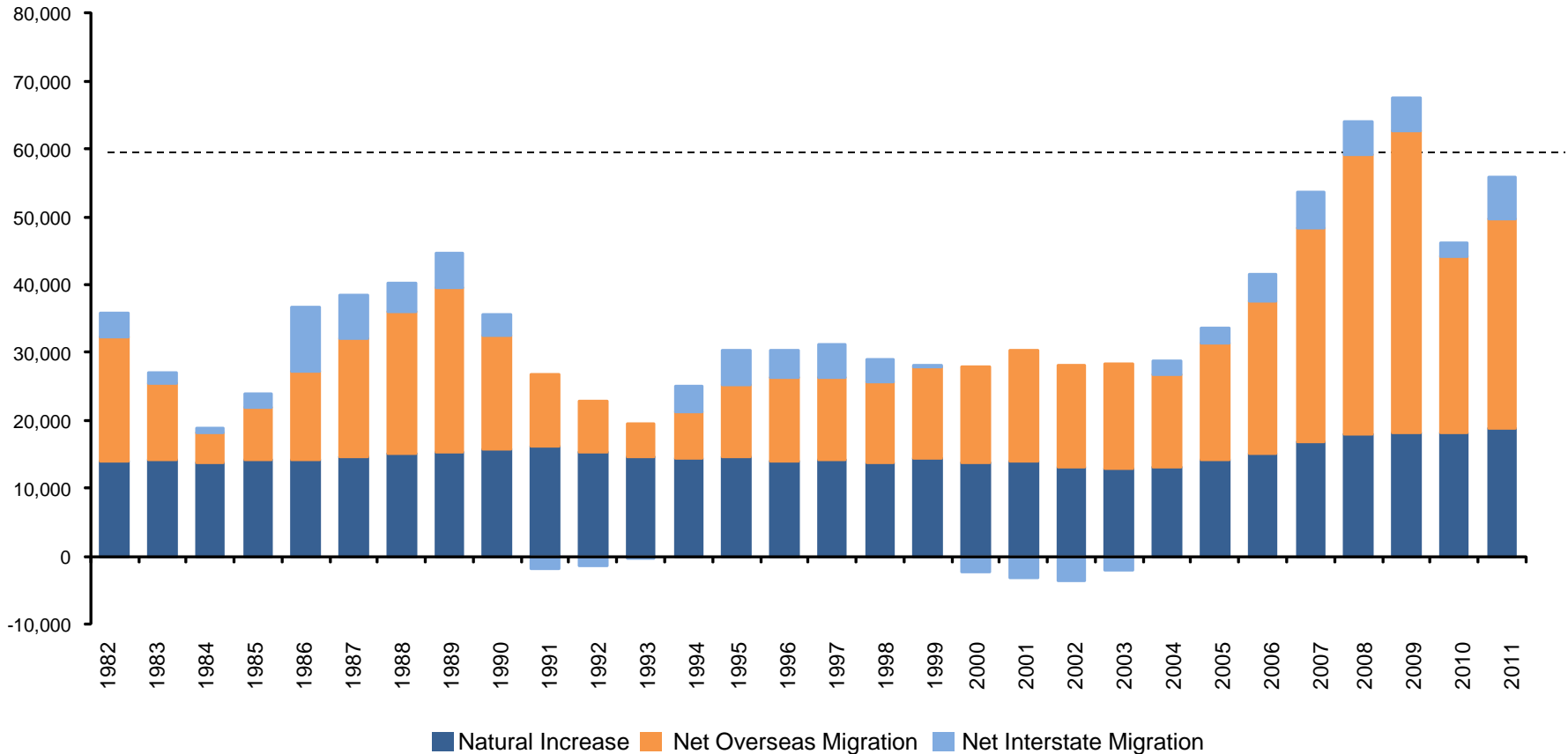
1.61m

1.87m

2.30m

← 561,000 @ 1950

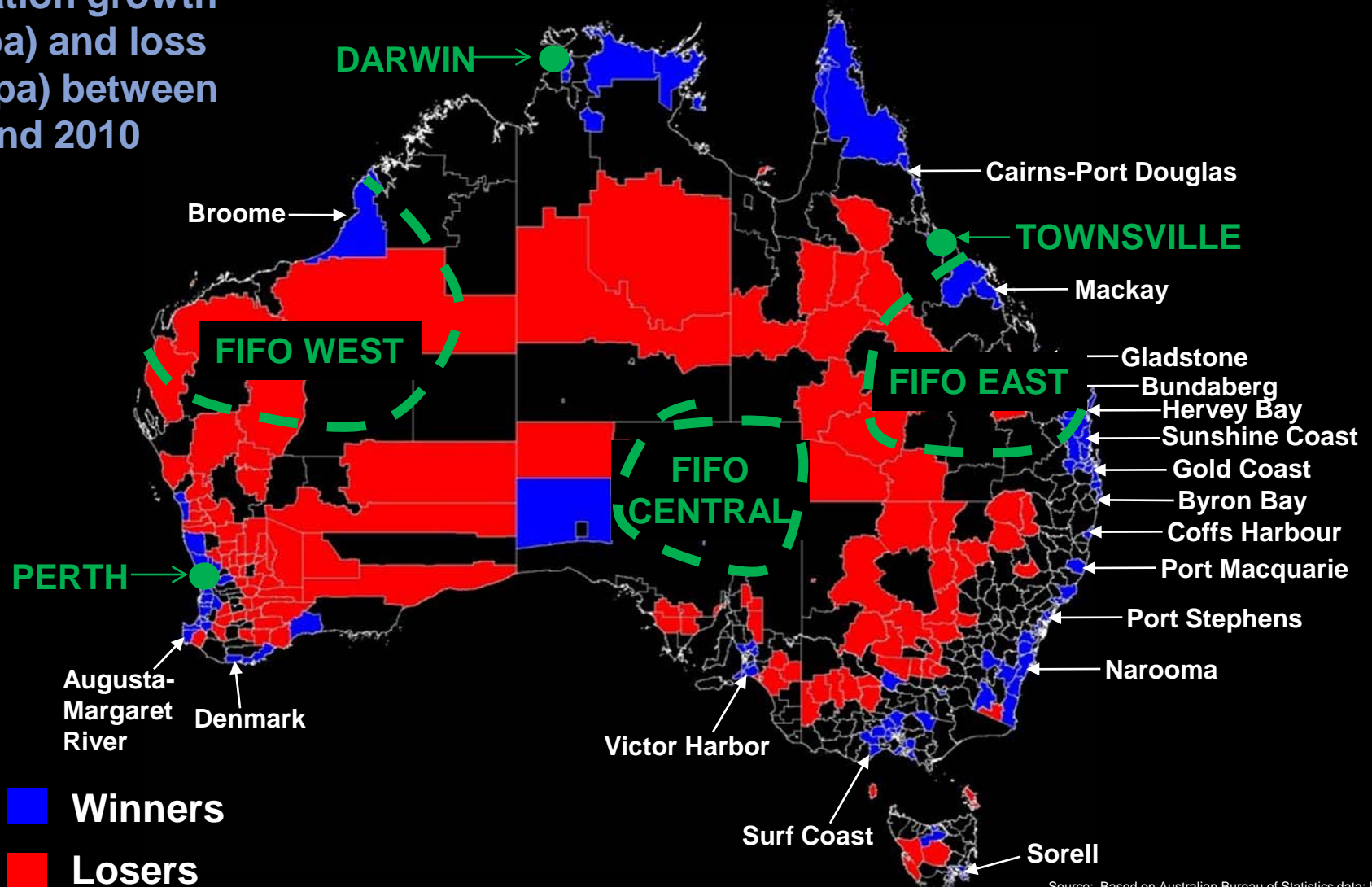
4.05m @ 2050 →



● Components of population growth in Western Australia between 1982 & 2011

Australians are reluctant to move from the capital cities or the coast ... FIFO proves this point

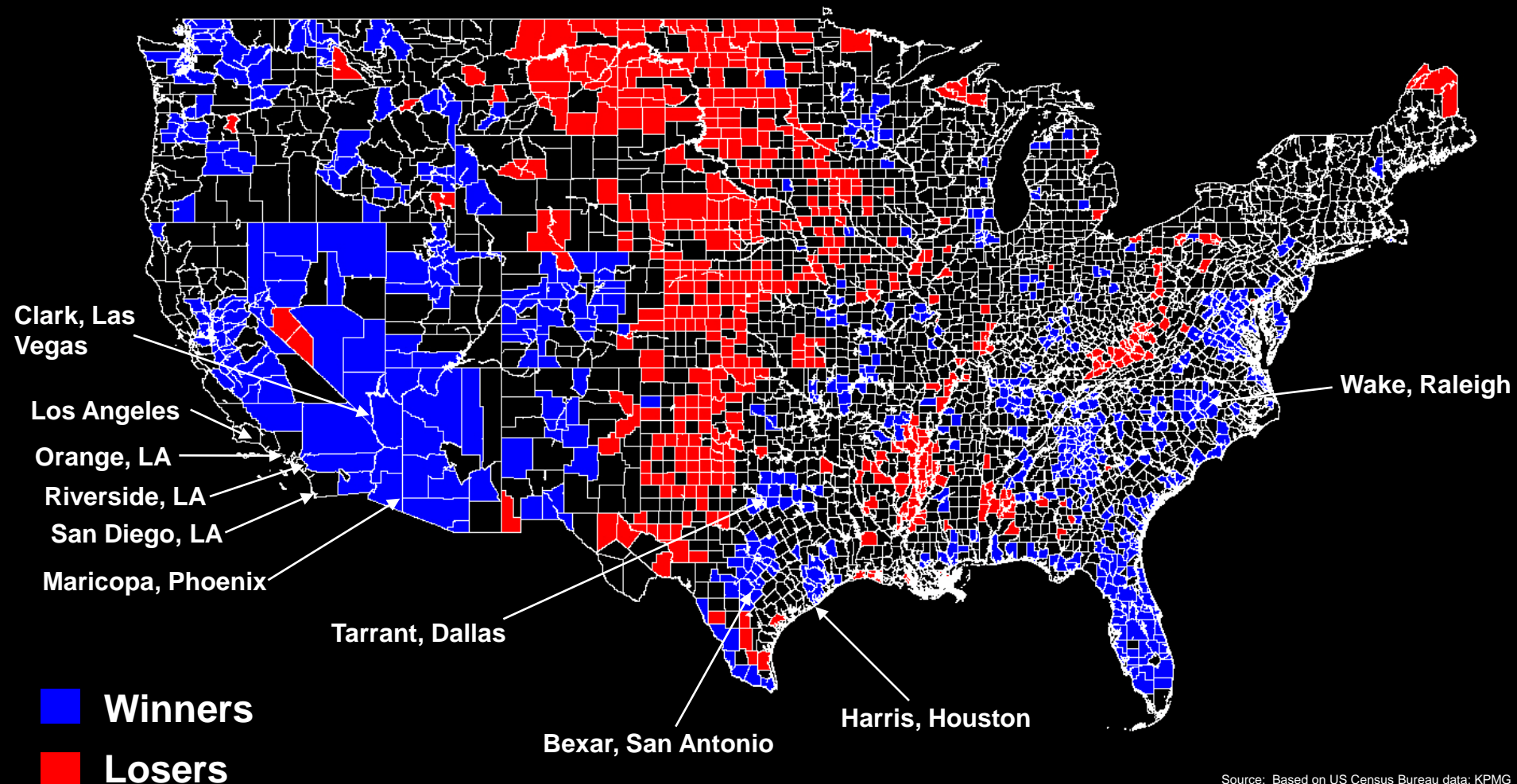
Areas of high population growth (>2% pa) and loss (<-1% pa) between 1986 and 2010



Source: Based on Australian Bureau of Statistics data; KPMG

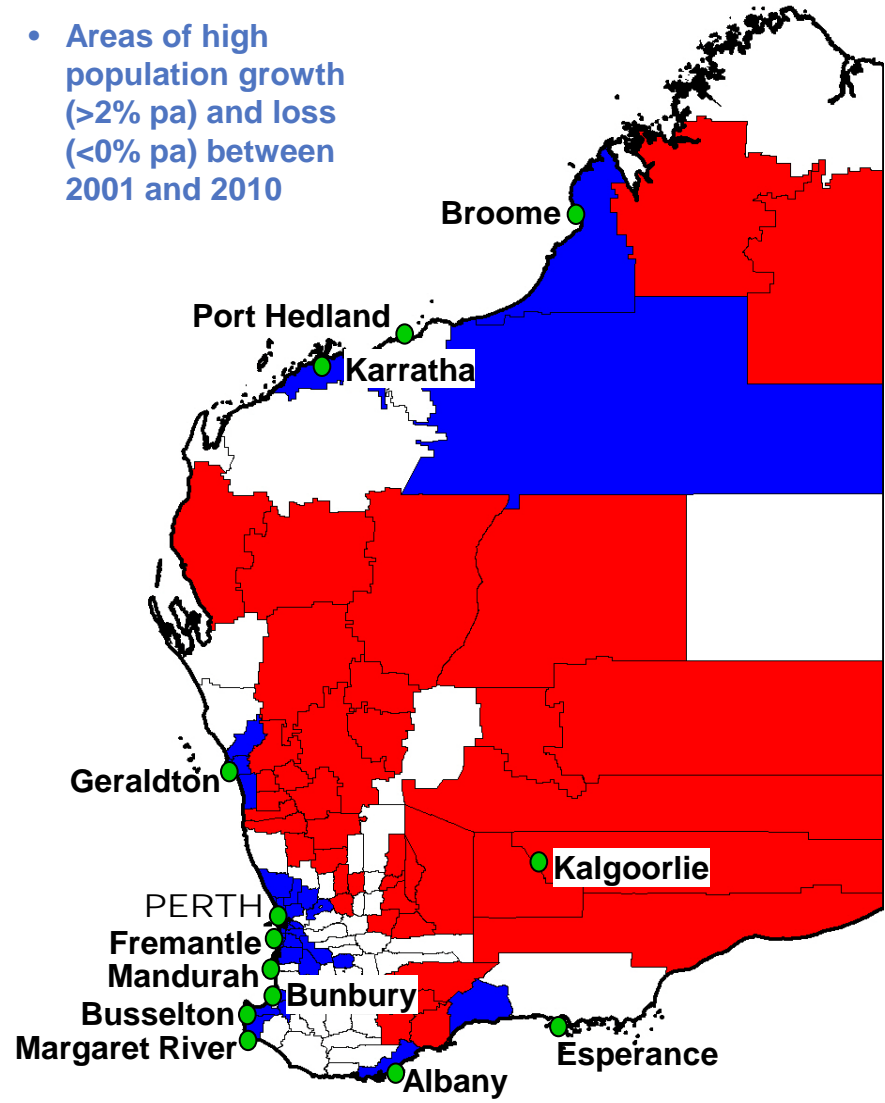
The Big Shift to the American Sunbelt

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

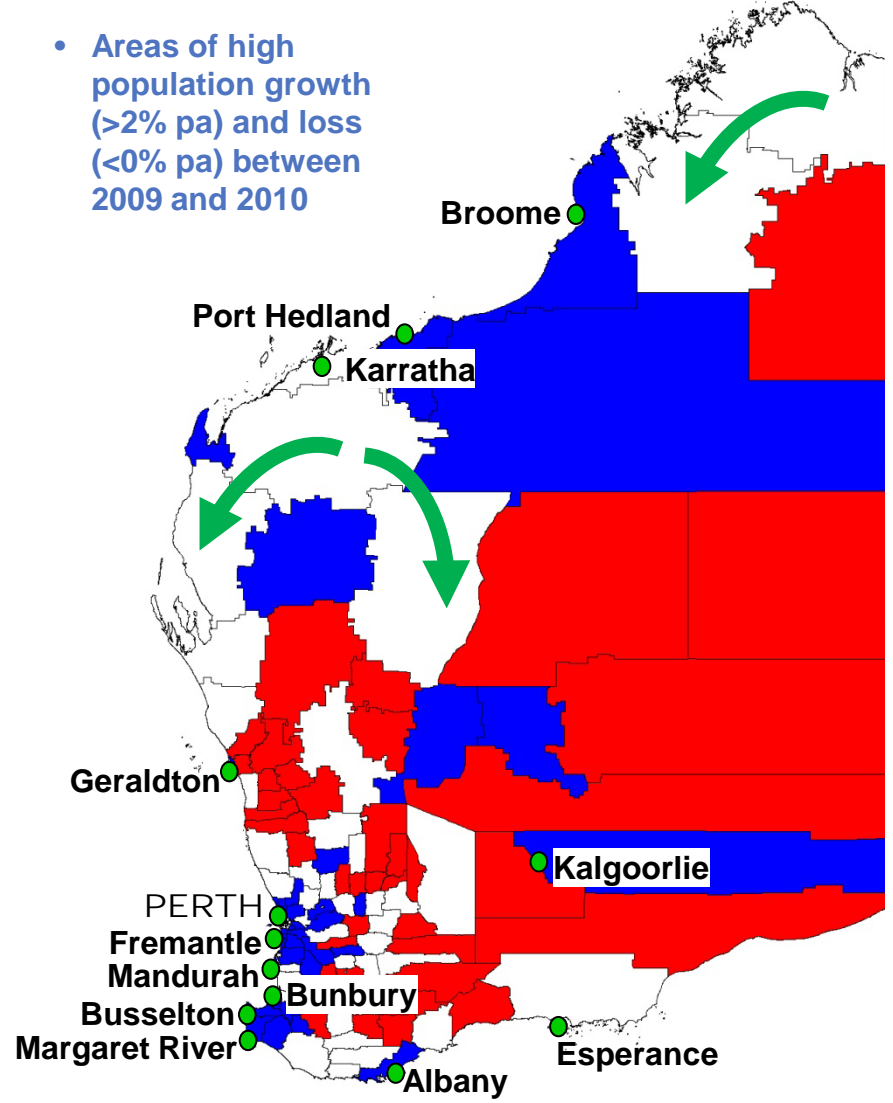


Major issue with population loss across inland WA ... growth now spilling into the Kimberley and the Pilbara

- Areas of high population growth (>2% pa) and loss (<0% pa) between 2001 and 2010



- Areas of high population growth (>2% pa) and loss (<0% pa) between 2009 and 2010



Demographic indicators show opportunities and challenges for Western Australia in the coming decade

Fastest-growing

	Net growth June 2010
• Wanneroo	5,999
• Rockingham	3,927
• Stirling	3,268
• Swan	2,940
• Armadale	2,847
• Gosnells	2,732
• Cockburn	2,636
• Joondalup	2,297
• Mandurah	2,163
• Melville	1,411

Leading Mining Towns

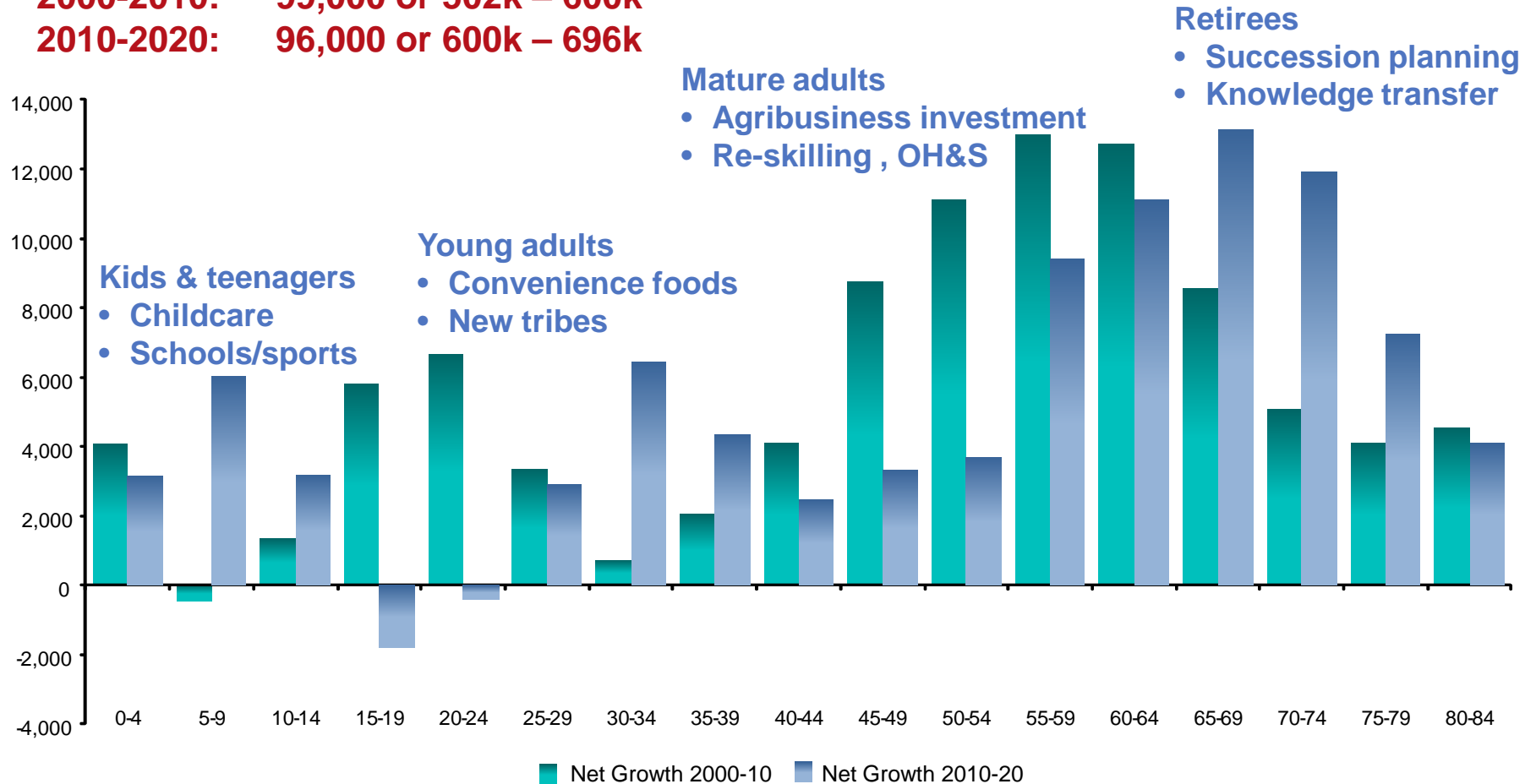
	Workforce Mining %
• Pannawonica	66
• Paraburdoo	61
• Wickham	50
• Tom Price	50
• Kambalda West	45
• Newman	45
• Leinster	42
• Dampier	34
• Norseman	32
• Coolgardie	25

Proportion volunteers

	2006 Census %
• Exmouth	34
• Moora	33
• Narrogin	33
• Bridgetown	33
• Denmark	33
• The Vines	13
• Kwinana	13
• Rockingham	14
• Ellenbrook	14
• Baldivis	15

Strong growth expected in rural WA in the childhood cohort ... and surprisingly in the 30-something cohort

2000-2010: 99,000 or 502k – 600k
2010-2020: 96,000 or 600k – 696k

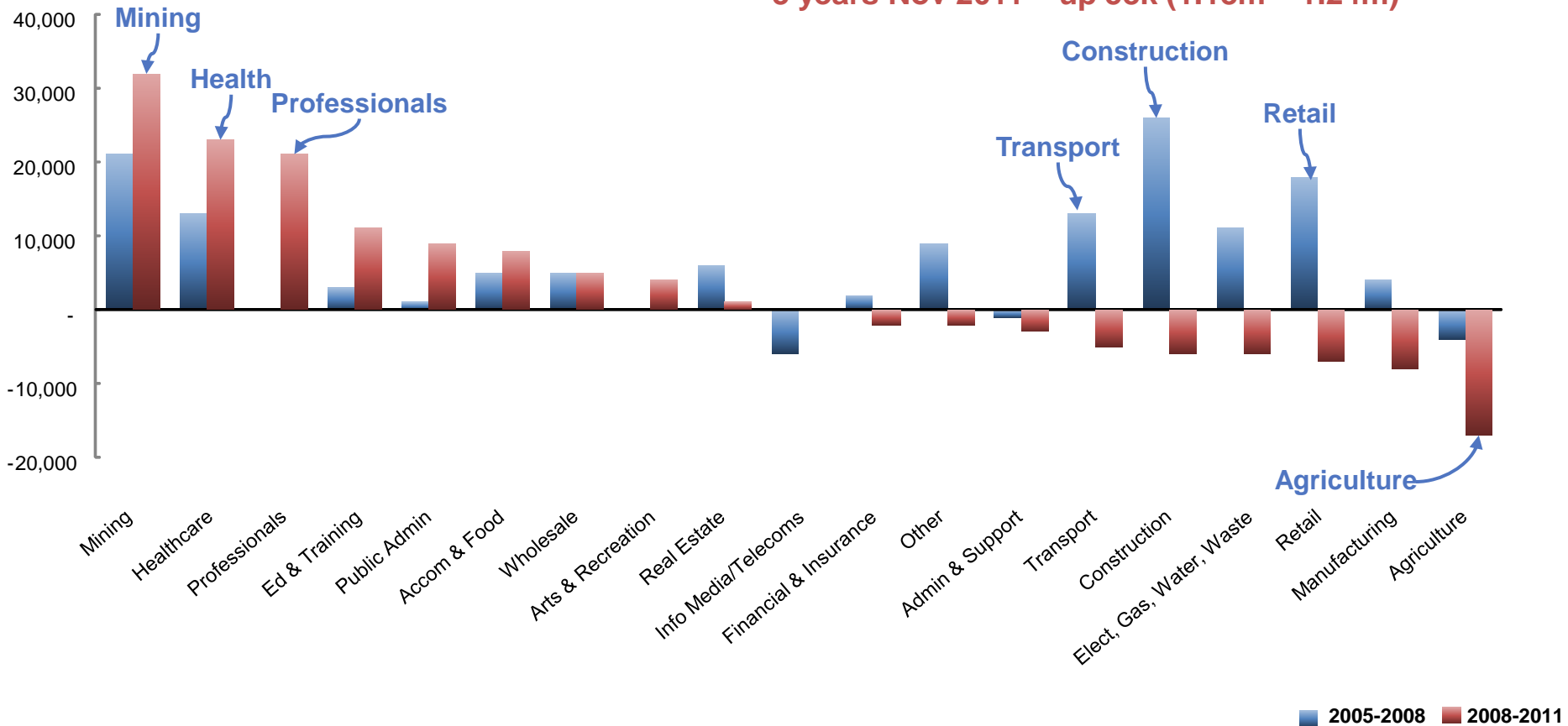


- Net change in regional Western Australian population by 5-year age group over 10 years to 2010 and 10 years to 2020

There has been a structural shift in the Western Australian economy ... away from agriculture and towards mining

3 years Nov 2008 – up 125k (1.06m – 1.18m)

3 years Nov 2011 – up 58k (1.18m – 1.24m)



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

There are two components to population in a mining town ... the permanent population ...

Townships	2006	2010	Change
Moranbah	7,607	8,526	12%
Dysart	3,340	3,425	3%
Middlemount	2,174	2,235	3%
Clermont	1,976	1,952	-1%
Glenden	1,179	1,315	12%
Nebo	298	343	15%
Balance (inc Coppabella & Hail Creek)	4,539	4,833	6%
Total Municipality	21,113	22,629	7%

... and the donga population ... it prompts the question of what the real population is in Pilbara towns

Township	2010	2011	2012	Change 2011-12
Moranbah (inc camps nearby)	n/a	5,696	15,875	179%
Dysart	n/a	3,816	4,248	11%
Middlemount	n/a	2,768	3,210	16%
Nebo	n/a	1,990	2,494	25%
Glenden	n/a	1,200	2,700	125%
Clermont	n/a	585	585	0%
Balance (Coppabella & Hail Creek)	n/a	3,746	4,310	15%
Total	n/a	19,801	33,422	69%

Service demand is different for residents and non-residents in mining towns

Resident only

- Nursing Home
- University
- TAFE
- High School
- Primary School
- Childcare Centre
- Kindergarten
- Grain receiver Depot
- Caravan Park
- Saleyard

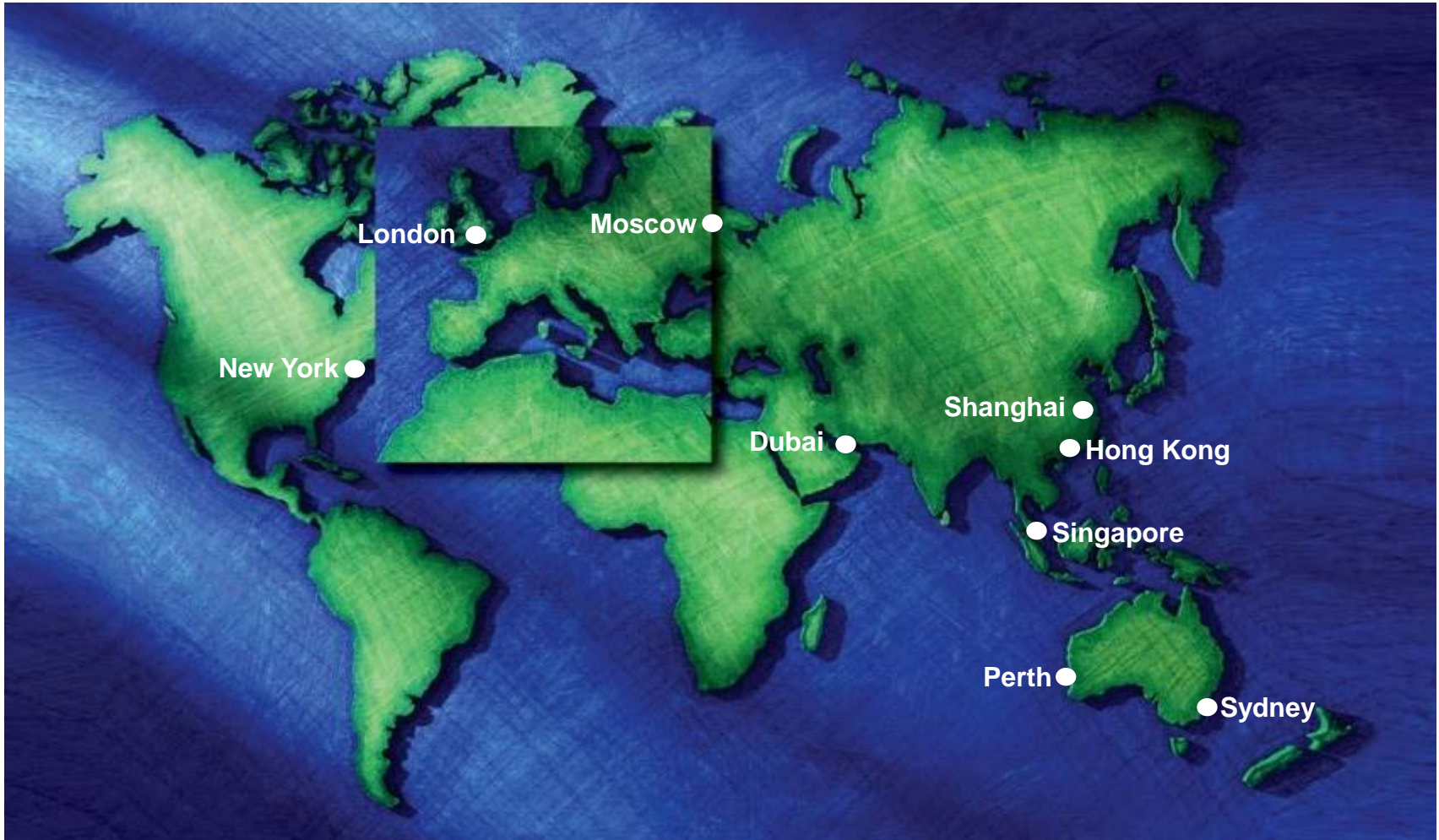
Residents & non-residents (equal impact)

- Ambulance
- Fire
- Police
- Hospital
- Pharmacy
- General Practitioner
- Nurse
- Dentist
- Hotel/Motel/Guest House
- Caravan Park
- Non-resident Bed
- Rented Accommodation
- Landfill
- Main Road
- Water/Waste Water

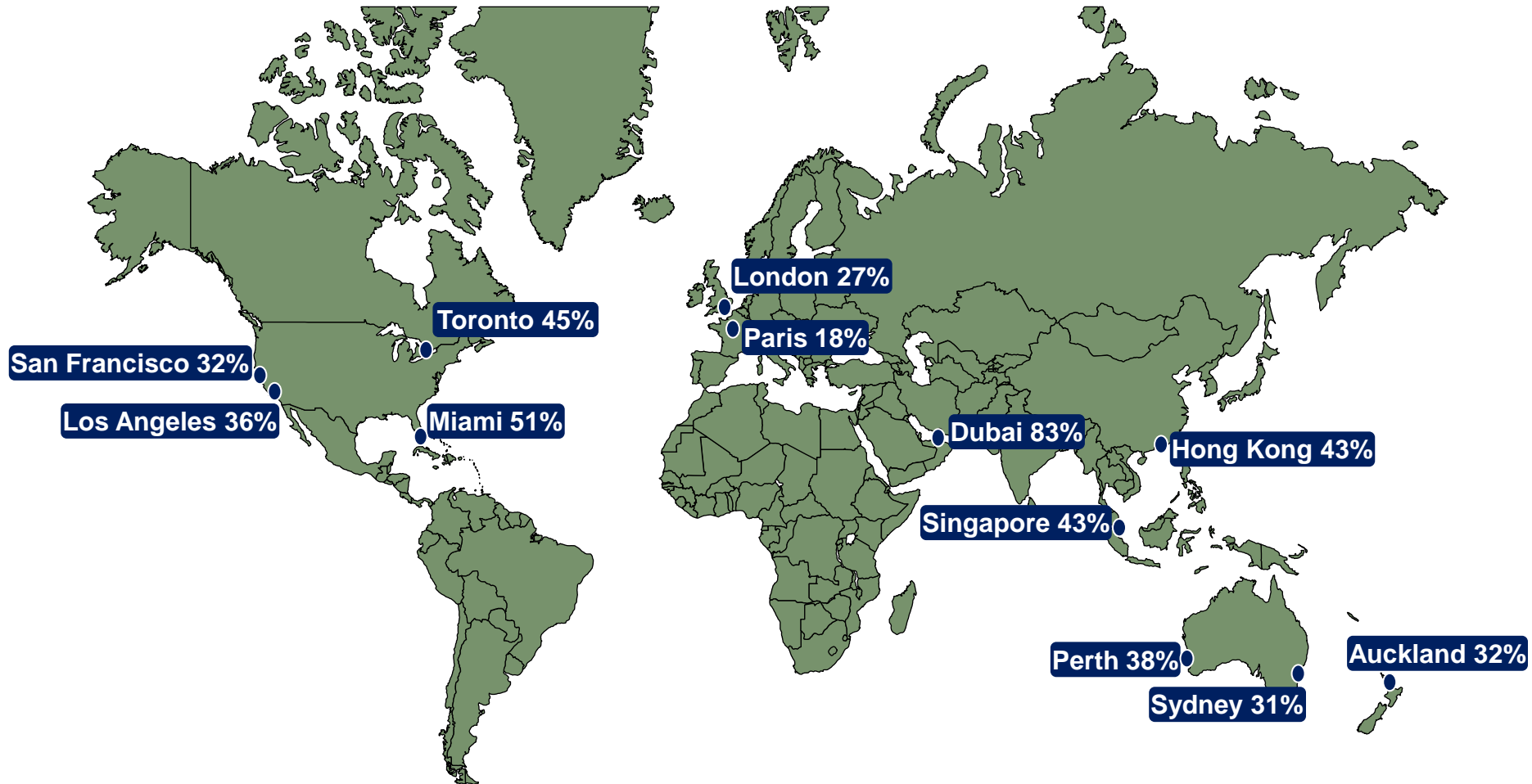
Residents & non-residents (non-equal impact)

- Supermarket
- Courthouse/Magistrates Court
- Local Government
- Cinema
- Restaurant
- Post Office
- Open Space – general
- Open Space – active
- Open Space – passive
- Gym
- Museum/Art Gallery
- Private Dwelling

Australia will benefit from rise of “The Dubai Effect”



Successful global cities are always ethnically diverse ... they are open and attract talent



Contact

Bernard Salt

KPMG Australia

+61 3 9288 5047

bsalt@kpmg.com.au

www.bernardsalt.com.au

twitter.com/bernardsalt

[linkedin.com/in/bernardsalt](https://www.linkedin.com/in/bernardsalt)

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