QUEENSLAND REMAINS A POPULATION MAGNET

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While there was a relative lull in the late 1990s, Queensland's population growth has resumed its earlier rapidity. In the past the main driver was immigration from other states, chiefly New South Wales and, to a lesser extent, Victoria. Now overseas immigration to Queensland is growing fast and it, together with natural increase, is likely to be the key determinant of Queensland's future growth.

In population terms Queensland has a reputation of being Australia's growth state. An analysis of the latest data available for all states, including the 2006 population census results, shows that this is indeed the case with Queensland recording the largest level of growth in each year since 2002 and usually also registering the fastest level of growth in percentage terms. The components of growth, however, are changing as is the distribution of growth within Queensland. The state is now more reliant on overseas migration as the major contributor to growth. This trend towards a higher level of overseas migration is expected to continue while interstate migration is projected to remain relatively subdued.

QUEENSLAND'S CURRENT GROWTH

Queensland's place as a leader in Australian population growth has been well established since the early 1980s. For most of the period since 1981, Queensland has recorded the nation's fastest and largest population growth. Between 1991 and 2007, Queensland recorded the largest population growth of any state or territory, growing by 1,221,100 people compared to 990,300 people in New South Wales and 784,800 people in Victoria (Table 1).

The average annual population growth during this period was 76,300 people, compared to 61,900 in New South Wales and 49,100 in Victoria. In terms of population growth rate at the state level,

	1991 to 1996	1996 to 2001	2001 to 2006	2006 to 2007	1991 to 2007	Total Change 1991 to 2007
NSW	61.2	74.1	48.4	71.9	61.9	990.3
Victoria	28.0	48.9	64.7	76.9	49.1	784.8
Queensland	75.5	58.1	92.5	90.5	76.3	1,221.1
SA	5.6	7.5	11.3	16.3	8.6	138.2
WA	25.8	27.2	31.6	46.7	29.4	469.7
Tasmania	1.5	-0.5	3.6	3.4	1.7	26.5
NT	3.3	3.2	2.6	4.3	3.1	49.5
ACT	3.8	2.2	3.0	5.6	3.2	50.5
Australia	205.3	220.5	257.6	315.7	233.3	3,733.2

 Table 1: Population change, states and territories 1991 to 2007 (average annual change in thousands, year to June)

Source: Australian Bureau of Statistics (ABS) catalogue no. 3101.0

Notes: NSW is New South Wales; SA is South Australia; WA is West Australia; NT is Northern Territory; ACT is Australian Capital Territory.

Queensiand nas competed with western Australia in recording Australia's fastest growth. Over the 2001 to 2006 period, Queensland's average annual growth rate was 2.4 per cent, compared with 1.6 per cent in Western Australia, 1.3 per cent in Victoria and 0.7 per cent in New South Wales. The national growth rate was 1.3 per cent over the same period.

Analysis of the average annual population change across intercensal periods since 1991 (and the 2006 to 2007 period) reveals that Queensland's population growth has ranged from 58,100 people per annum between 1996 and 2001 to 92,500 per annum between 2001 and 2006, a 59 per cent variation. The state's relatively slow population growth between 1996 and 2001 is attributed to a low level of net interstate migration gain during this period. This slump occurred immediately after a high growth period, which had peaked at average annual growth of 75,500 between 1991 and 1996, and just before a record average annual growth of 92,500 between 2001 and 2006.

Over the 2006 to 2007 period, Queensland's population growth (90,500) exceeded that of any other state or territory, continuing the pattern evident between 2001 and 2006. Victoria's population growth also exceeded that of New South Wales in the 2006 to 2007 period, as it did between 2001 to 2006. This period was the first time that population growth in Victoria had outstripped population growth in New South Wales in terms of size since 1956.

While natural increase has remained a relatively steady contributor, migration, both net overseas and net interstate migration, has played a very significant but fluctuating role in Queensland's population growth (Figure 1). There is evidence of clear spikes in migration, from both interstate and overseas, in the early 1980s when net interstate migration rose from around 17,000 people in 1980 to 35,500 in 1982 and net overseas migration rose from

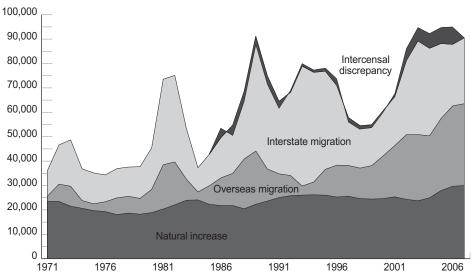


Figure 1: Components of population change, Queensland, year ending June 1971 to 2007

Source: ABS catalogue no. 3101.0 and unpublished data

around 9,500 to 17,000. Further spikes were observed in the late 1980s, partly as a result of the exposure that Expo 88 afforded to Queensland generally, and to South-East Queensland (SEQ) in particular. During this period net interstate migration rose from 19,700 in 1987 to 47,100 in 1989. A similar spike occurred in net overseas migration, which jumped from 13,200 to 21,800 over the same period, mainly due to a significant increase in trans-Tasman migration.

The early 1990s were also a period of strong population growth for Queensland, particularly with regard to interstate migration. While net overseas migration dropped back to pre-Expo 88 levels, net interstate migration surpassed the total recorded in 1989 and in 1993 (49,200 people) and 1994 (44,900), the highest levels in Queensland's history. For each year between 1992 and 1996, Queensland recorded a net interstate migration gain of over 30,000 people, considerably less than the peak in 1993 but substantially higher than for any other state or territory in Australia.

Total population growth in Queensland in the new millennium has surpassed the levels recorded in the early 1990s. Since 2002, Queensland has consistently recorded a total population growth of over 90,000 people per annum. While initially, as with the early 1990s, the driver of this growth was net interstate migration (which typically accounted for over 40 per cent of population growth), since 2005 an increased fertility rate and growth in the level of net overseas migration have altered the composition of population change. It is only in recent years that both natural increase and net overseas migration have contributed a higher share to population growth than net interstate migration.

Figure 1 reveals that intercensal discrepancy increased significantly, to 29,906 between 2001 to 2006 compared to 5,958 over the 1996 to 2001 period.¹

Intercensal discrepancy is caused by error in the start or finish population estimates between two censuses and/or with estimates of births, deaths and migration both interstate and overseas—which cannot be attributed to a particular source.

WHAT ARE THE SOURCE STATES OF INTERSTATE MIGRATION TO QUEENSLAND?

Since the 1960s interstate migration flows have been captured by the national census of population and housing. These flows fluctuate considerably from one intercensal period to the next in response to changing drivers of interstate migration best described by both push and pull factors. This is aptly illustrated by comparing the latest intercensal period, 2001 to 2006, with the previous five-year period, 1996 to 2001. While interstate arrivals to Queensland increased by 11.6 per cent in 2001 to 2006 compared with 1996 to 2001, departures from Queensland to other states and territories decreased by 8.4 per cent. As a consequence, net movement increased by 48.5 per cent from 82,396 to 122,403.

There is little doubt that Queensland has in recent years been experiencing strong employment growth in both absolute and relative terms compared with other states. In the early 2000s, high employment growth coupled with significant differentials in house prices between Sydney and Brisbane and, to a lesser extent, Melbourne and Brisbane have been major pull factors drawing people into Brisbane. While house prices in Sydney still substantially exceed those in Brisbane, and in South East Queensland in general, house prices in Brisbane and Melbourne are now fairly similar. The differential in house prices between SEQ and many other regions of Australia has also narrowed. To quantify the impact of the current difference in house prices as a contributor to interstate moves is difficult and we may need to wait

tor the 2011 census results before further analysis can be undertaken.

Based on census data, in the five years to 2006 the share of interstate migration contributed by each state to Queensland in percentage terms was quite similar to that recorded in the 1996 to 2001 period. New South Wales accounted for just over half (54.3 per cent) of all interstate arrivals and two thirds of the net interstate migration gain (66.5 per cent) in the 2001 to 2006 period. The 2001 to 2006 period contrasts sharply, however, with the 1991 to 1996 period when New South Wales accounted for 44 per cent and Victoria for 35 per cent of the net interstate migration gain to Queensland.

Table 2 shows a further breakdown of sources of interstate migration from New South Wales and Victoria to Queensland by capital city and balance of state. An

examination of the data does not support the common belief that the vast majority of movements to Oueensland from New South Wales are from Sydney. The Sydney statistical division (SD) provides just under half of all arrivals from New South Wales to Oueensland. accounting for 48.8 per cent. This level is slightly higher than the figure of 45.0 per cent recorded in the 1996 to 2001 period. In terms of net migration, however, Sydney SD contributed 57.2 per cent of the total net gain from movement interstate between New South Wales and Queensland.

As was reported by Barker² in an analysis of migration flows between New South Wales regions and Queensland over the 1996 to 2001 period, there continues to be a net migration loss from Queensland over the border with New South Wales into Tweed Shire. People are drawn by its proximity to SEQ (less than two hours by road from Brisbane), Tweed Shire's natural attractions of beaches and hinterland and its relative lack of overcrowding. This trend is likely to accelerate with the recent opening of the Tugun road bypass. This links the southern end of the Gold Coast with Tweed Shire, reducing travel times by up to 20 minutes in peak periods.

Over the five years to 2006, interstate migration between Victoria and Queensland was dominated by people moving to and from the Melbourne SD. Of the people moving from Victoria to Queensland in this period, 63.8 per cent of all migrants were from the Melbourne SD compared with a 60.5 per cent share of the

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	Arrivals	Departures	Net
Sydney	69,185	22,612	46,573
Tweed (A) Part A	5,101	5,247	-146
Balance of Richmond-Tweed SE	0 10,134	5,894	4,240
Rest of NSW	57,429	26,667	30,762
NSW Total	141,849	60,420	81,429
Melbourne	33,410	21,321	12,089
Rest of Victoria	18,951	11,068	7,883
VIC Total	52,361	32,389	19,972
SA	16,688	9,350	7,338
WA	18,014	13,924	4,090
Tasmania	8,899	7,932	967
NT	13,862	8,551	5,311
ACT	9,586	6,271	3,315
Other territories	37	56	-19
Total	261,296	138,893	122,403

 Table 2: Interstate flows to and from Queensland

 2001 to 2006 (financial years)

Source: ABS, 2006, Census of population and housing, unpublished data

net gain. 1 nis is not surprising given that 72.8 per cent per cent of the Victorian population lives in the Melbourne SD. This distribution is in marked contrast with the 1996 to 2001 period, when the Melbourne SD contributed only 33.8 per cent of Queensland's net gain from Victoria.

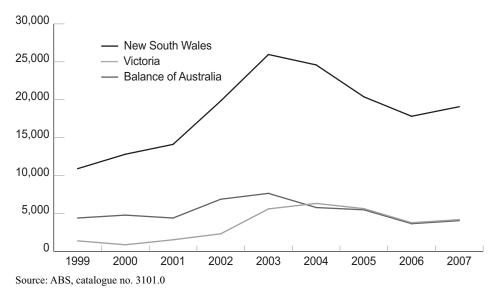
The remaining states and territories accounted for 17.2 per cent of Queensland's net interstate gain. South Australia and the Northern Territory were the major contributors.

It is important to note that migration data derived from the census questions on your usual place of residence five years ago understate the actual level of movement over the intercensal period.³

Apart from population censuses, estimates of interstate migration are determined by the Australian Bureau of Statistics based on interstate change of address advice to Medicare Australia and to the Department of Defence in the case of the military. Due to the non-compulsory and indirect nature of the available data, quarterly estimates of interstate migration have long been considered the weakest measure of a component of population change. These data, when analysed on an annual basis, show that for at least the last 10 years, net migration to Queensland has been dominated by New South Wales. In 2007, more than two thirds of all migrants to Queensland came from New South Wales, compared to just 15.3 per cent from Victoria. As can be seen in Figure 2, the net annual migration gain from New South Wales peaked in 2003 at 25,964 people, before slowing to 17,817 in 2006. A slight rise was recorded in 2007 to 19,079. A similar pattern, albeit on a smaller scale, was evident with regard to Queensland's net gain from Victoria-migration peaked at 6,320 in 2003, before dropping back to 3,776 in 2006 and rising again to 4,183 in 2007.

Since 1999, Queensland has also experienced a net migration gain from the balance of Australia. It is interesting to note, however, that net migration from

Figure 2: Net interstate migration gains to Queensland, 1999 to 2007



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victoria in the 2000s was well below the levels recorded in the early 1990s when the net gain to Queensland from Victoria peaked at over 18,000 people in 1994. Despite this decline, Figure 2 show that the gain from Victoria since 2004 has been greater than that received from all other states combined (excluding NSW). In comparison, in 2007, Queensland recorded a net gain of 4,048 from all other states combined compared to 4,183 from Victoria.

AGE STRUCTURE OF NET INTERSTATE MIGRATION

Research shows that long distance migration is highly sensitive to stages in the life cycle, as represented by a person's age.⁴ Since the abolition of death duties in 1978, Queensland has had a reputation for attracting retirees. Despite the popular misconception that Queensland attracts large numbers of older migrants, the maJority of migration to, in and from Queensland over the last 30 years has not been by people over 60 years of age.

According to the census data, people aged 60 years and over accounted for 11.6 per cent of the net interstate migration gain to Queensland between 1976 and 1981, 12.5 per cent between 1981 and 1986, 12.9 per cent between 1991 and 1996 and 14.1 per cent between 1996 and 2001. Between 2001 and 2006, people over 60 years of age accounted for 12.1 per cent. This is a lower share than in the four previous intercensal periods.

By way of comparison, the proportion of Queensland's resident population aged 60 years and over was 13.3 per cent in 1976, rising to 16.9 per cent by 2007. Figure 3, shows age-groups of arrivals, departures and net migration for the year ending June 2007. It reveals that, for inward and outward movement, the young adult ages—20 to 34 years—dominate the

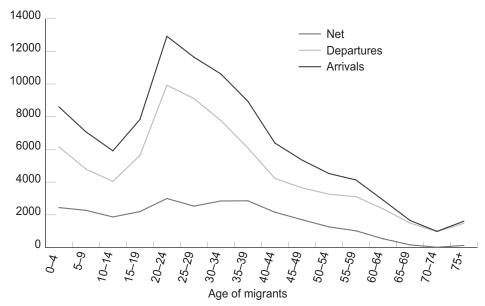


Figure 3: Age profile of interstate migration, Queensland, 2006 to 2007

Source: ABS, unpublished data

age profile, reflecting the high mobility rates of those age groups. It is not surprising that young adults have high mobility rates for all types of movements, including interstate migration. Factors contributing to high levels of mobility in this age group include the pursuit of educational and employment opportunities, as well as the many perceived attractions of metropolitan cities in comparison with rural and regional areas.

Between 2000 and 2007, the age profile of net interstate migration has shifted significantly (Figure 4). In 2000, there was a net migration loss of people aged 20 to 24 and comparatively small gains in the 25 to 34 year age groups, while people aged between 35 to 45 and children under 15 represented the largest proportions of migrants. The reasons for the dramatic turnaround with young adult age groups are related to the growing attraction of Brisbane and the Gold Coast as destinations for education and employment opportunities, combined with an attractive lifestyle. In many people's eyes, Brisbane is no longer regarded as a big country town, but as a sophisticated, cosmopolitan city providing the physical and social attributes that young adults seek.

In recent years young adults in their 20s and 30s have accounted for the largest share of net interstate migration, 41.6 per cent in 2007 compared with only 17.6 per cent in 2000. While the number of children under 15 has remained relatively high, the level of net interstate migration for the 60 years and over age group decreased from 2,500 to 800 people between 2000 and 2007.

OVERSEAS MIGRATION

Until recently interstate migration made a greater contribution to Queensland's population growth than overseas migration and

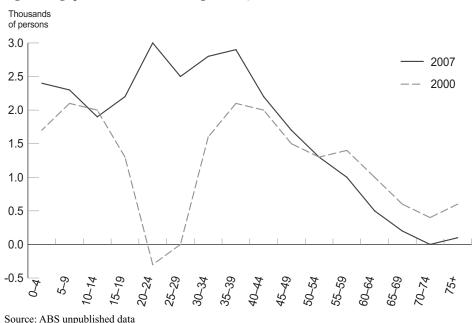


Figure 4: Age profile of net interstate migration, Queensland, 2000 and 2007

was requently nigner than the natural increase component. This helps explain why there has been relatively little analysis of the role of overseas migration as a contributor to the state's growth.

Queensland's share of Australia's overseas migration has historically been well below the state's share of the nation's population. There has, however, been a dramatic turnaround since the late 1990s with Queensland capturing more than 23 per cent of Australia's net overseas migration between 2002 and 2005. Figure 5 shows that the proportion peaked at 25.4 per cent in 2004 before declining to 18.9 per cent in 2007.

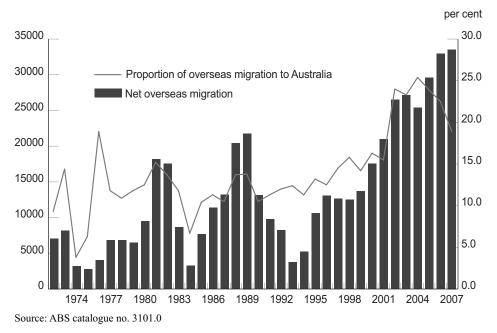
One contributor to the increased level overseas migration is the Australian Government's expansion of the skills component of the migration program.

The strong employment growth Queensland has recorded during the 2000s appears to have attracted a larger share of this expanded skilled intake to the state. Queensland also attracts a disproportionate share of New Zealand citizens migrating to Australia, capturing more than 40 per cent of the national movement each year since 2003. Since 2003, the number of New Zealanders migrating to Australian on a permanent basis has almost doubled, from 6,331 people to 12,979 in 2007.

Although New Zealand has been the dominant source nation for overseas migrants moving to Queensland for at least 20 years, the United Kingdom and South Africa are currently ranked second and third. Queensland has always attracted a greater share of its permanent arrivals migrating from predominantly Englishspeaking countries, compared with New South Wales and Victoria.

Figure 5 indicates that Queensland's share of Australia's net overseas migration dropped surprisingly from 22.5 per cent in 2005-06 to 18.9 per cent in 2006-07. A

Figure 5: Net overseas migration to Queensland and proportion of overseas migrants to Australia coming to Queensland, 2006 to 2007



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partial explanation for the proportional decline may relate to the changed methodology for measuring the level of net overseas migration introduced by the ABS since the September quarter 2006.

The key change is the introduction of a 12/16 month rule for determining a person's residency in Australia. This does not affect the data on permanent arrivals but it does bear on the long-term arrival data. Under the new 12/16 rule a person has to live permanently in Australia for 12 months out of a 16-month period to be counted as a long-term arrival. This change replaces the previous 12/12 month rule, which required a person to live permanently in Australia for a continuous period of 12 months to be counted as a long-term arrival. As the changed methodology only took effect from the September quarter 2006 it is too soon to determine what impact, if any, it may have on Queensland's share of net overseas migration.

REGIONAL MIGRATION TRENDS

Since the 1990s, SEQ has been the outstanding performer in terms of regional population growth in both Queensland and Australia. In the 2001 to 2006 period the region captured 21 per cent of the nation's growth, which was a higher share than for the entire state of New South Wales and more than the contribution from Western Australia, South Australia, Tasmania, Australian Capital Territory and Northern Territory combined. While preliminary figures for the year ending 30 June 2007 show that SEQ's share of Australia's growth has declined marginally, it still accounts for one fifth of the national increase.

Migration, both interstate and overseas, is driving population growth in SEQ as it has done since the 1970s. Analysis of census data for the 2001 to 2006 period shows that SEQ⁵ has accounted for nearly three quarters of the net interstate migration gain to Queensiand. Brisbane SD represented 48 per cent of the SEQ total net gain, while the newly created Gold Coast SD and Sunshine Coast SD accounted for 34 per cent and 17 per cent respectively. In terms of overseas migration, SEQ dominates movement to the state, accounting for 82.6 per cent of the net overseas migration over the 2001 to 2006 period. Brisbane SD represents 57.9 per cent of the state's net overseas migration total, while Gold Coast SD accounts for 17.6 per cent and the Sunshine Coast SD for 6.5 per cent. Outside of SEQ, net overseas migration is dispersed, with the largest net overseas migration recorded in the Far North SD (centred on Cairns), which accounted for 3.9 per cent.

Outside SEQ, the Wide Bay-Burnett SD (mainly the coastal areas of Hervey Bay and Bundaberg Cities and Burnett and Cooloola Shires) captured 8.4 per cent of net interstate migration to Queensland, followed by Far North SD with 5.2 per cent and Mackay SD with 3.8 per cent. Darling Downs SD (mainly Toowoomba region), Northern SD (mainly Townsville region) and Fitzroy SD region (mainly Rockhampton region) each captured a net interstate migration gain of around 3,400 people. While this level of regional migration gain represents a relatively small proportion of the state's net gain (2.7 to 2.8 per cent) it nevertheless is a substantial increase on the level recorded in each SD in the 1996 to 2001 period.

Apart from Western Queensland, all SDs recorded sizeable increases in the amount of net interstate migration in 2001 to 2006 compared with 1996 to 2001. In some cases, such as Mackay, Northern and Fitzroy SDs, the increases can be directly attributed to increased employment as a result of the resources boom in both coal and metallurgic mining. In other coastal SDs such as Wide Bay-Burnett and Far North Queensland, so-called sea-change movement is also evident. Both trends are expected to continue in the 2006 to 2011 period.

In terms of net intrastate migration within Queensland during the 2001 to 2006 period, Wide Bay-Burnett SD was the clear winner. The region attracted a net gain of more than 6,000 people (Figure 6). An analysis of the age profile indicates that the largest gains were recorded in the early retirement ages of 55 to 64 years although all ages groups except young adults in their twenties recorded net gains.

The newly created Sunshine Coast SD also attracted a net intrastate gain of more than 5,000 people. While the region lost young people aged between 15 to 24 years, mainly to Brisbane SD, it recorded strong gains in all age groups between 30 to 64 years with no pronounced peak in the early retirement years as observed in the Wide Bay-Burnett region. In marked contrast with the Sunshine Coast region, the newly created Gold Coast SD, which is totally dominated by the Gold Coast local government area, recorded a similar number of intrastate arrivals and departures.

Northern and Mackav SDs experienced net intrastate migration gains of 1,800 and almost 900 respectively, a sharp turnaround from losses of more than 5,000 people for each region in the 1996 to 2001 period. The resources boom in the coal mining industry has occurred in these regions since 2003, associated increase in fly-in/fly-out workers living in the two regions. This is the likely explanation for the marked reversal in the trend from a significant loss in the late 1990s to a sizeable gain five years later.

In contrast, the Fitzroy SD, which covers the southern end of the coal resources in the Bowen Basin, still

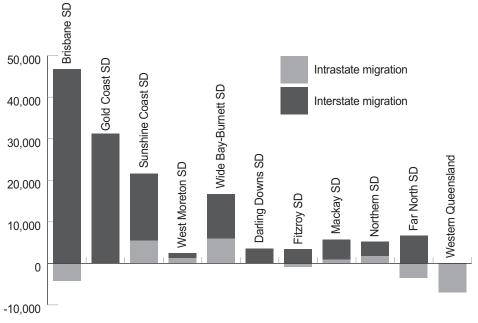


Figure 6: Net inter- and intrastate migration flows, Queensland, 2001 to 2006

Source: ABS, 2006, Census of population and housing, unpublished data

registered a net intrastate ioss of over 800 people in the 2001 to 2006 period. This was a substantial improvement on the 6,000 loss recorded in the 1996 to 2001 period. Based on continuing labour growth from coal mining expansion in all districts of the Bowen Basin it is expected that net intrastate migration in the future will be positive.

The remaining coastal region, Far North SD centred on Cairns, recorded a net intrastate loss of 3,400 people in 2001 to 2006, about half the size of the loss recorded in 1996 to 2001. The region continues to show a strong loss in the young age groups up to 24 years with most older age groups also showing a slight loss.

As occurred in the 1996 to 2001 period and reported by Barker and Taylor,⁴ the only coastal region outside SEQ that recorded a net intrastate migration gain in the 15 to 24 years age group over the 2001 to 2006 period was Northern SD. Townsville, the dominant regional centre in the SD, is the location of a major university and defence force establishment. The Townsville region attracted a sizeable net gain of more than 3,000 young people aged between 15 to 24 years from the remainder of Northern and Western Queensland.

Gold Coast SD, with a net gain of 700 people, was the only other nonmetropolitan SD to record a net intrastate gain in the 15 to 24 years age group between 2001 and 2006. This level is substantially less than the net gain from interstate migration, suggesting that the Gold Coast is still a magnet for young people from interstate but not so for Queenslanders.

It should be remembered that census data significantly understate the level of inter- and intrastate migration.⁶ In addition, census data for overseas migration only capture in-flows, not out-migration.

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Driven by the resources boom, Queensland is projected to experience strong economic growth for the foreseeable future. As a consequence, demand for labour will remain higher than the local market can supply, which will encourage people both from within Australia and overseas to migrate to the state.

New population projections being prepared by the Queensland Government indicate that growth will continue to remain close to the historically high levels recorded so far this decade. Each of the three components of population growth at the state level, natural increase, net interstate migration and net overseas migration, will contribute to a high level of overall growth in the future.

In contrast with most of the past thirty years, interstate migration is expected to make the least contribution to Queensland's total growth. Overseas migration will increase to be the largest contributor to growth, while the state's expanding population in the child-bearing ages will continue to drive the number of births higher.

The distribution of growth within Queensland is likely to change considerably with stronger growth in the coastal centres of Hervey Bay, Gladstone, Rockhampton, Mackay, Townsville and Cairns, largely based on a continuation of the mining boom. Many of these centres are home to a growing number of fly-in/ fly-out mining workers and related contractors who work and stay on a regular basis in the mining locations, but do not reside there permanently.

SEQ is projected to dominate the state's growth but represent a declining share of growth in comparison with periods in the recent past. A number of fly-in/fly-out workers are also expected to live in SEQ because of the region's high amenity. Housing affordability remains a key issue in SEQ as well as in some coastal centres such as Mackay and Gladstone. While housing affordability could alter the pattern of growth across the state, there is little doubt that, under most expected scenarios, Queensland, in population terms, will remain Australia's growth state.

References

- ¹ In its publication *Australian Demographic Statistics* (catalogue no. 3101.0), the Australian Bureau of Statistics, describes intercensal discrepancy as 'the difference between two estimates at 30 June of a census year population: the first based on the last census, and the second arrived at by updating the 30 June estimates on the previous census date estimate with intercensal components of population change which take account of information available from the latest census'.
- ² R. Barker, 'The northern population drift accelerates—Queensland, Australia's growth state', *People and Place*, vol. 12, no. 3, 2004, pp. 28–39
- ³ The 2001 to 2006 migration data exclude persons aged under five years at the 2006 census, persons who did not state their usual residence in 2001, those who stated that they had no usual residence in 2001, and those who stated they had no usual residence in 2006. Migration data at statistical division (SD) level also exclude those whose usual residence in 2006 was 'undefined Queensland'. It should be noted that, for some migration flows, there may be large numbers of persons in these categories who cannot be included in the analysis.
- ⁴ R. Barker and A. Taylor, 'Myths about migration in Queensland: are they fact or fiction?', *Dialogue*, vol. 24, no. 2, 2005, pp. 38–51
- ⁵ Since 2006, the South-East Queensland Region has comprised the Brisbane, Gold Cost, Sunshine Coast and West Moreton statistical divisions.
- ⁶ See note 3 above.