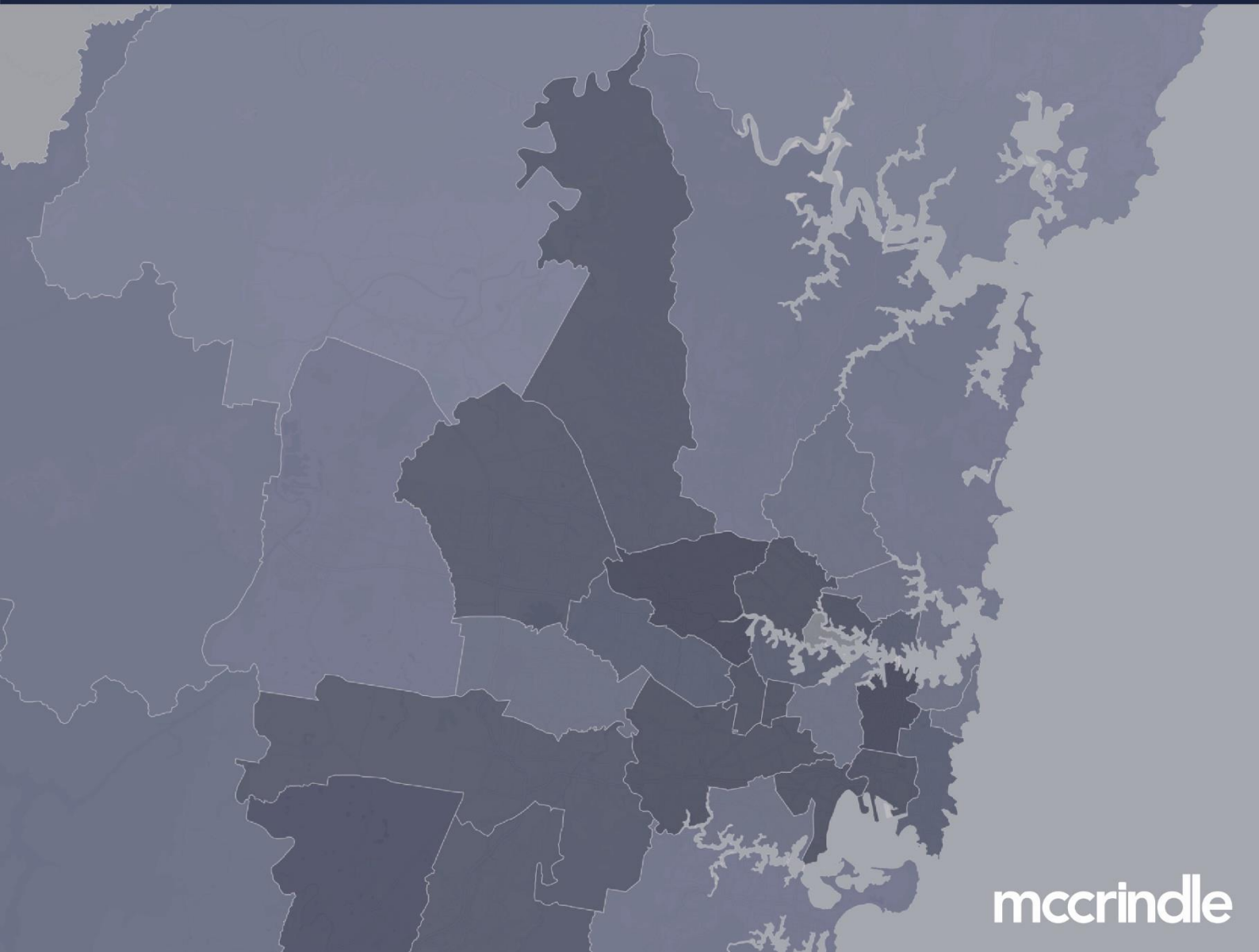


THE **FUTURE** OF NORTH WEST SYDNEY

DEMOGRAPHIC AND EDUCATION
TRENDS IN SYDNEY'S NORTH WEST

AUGUST 2018



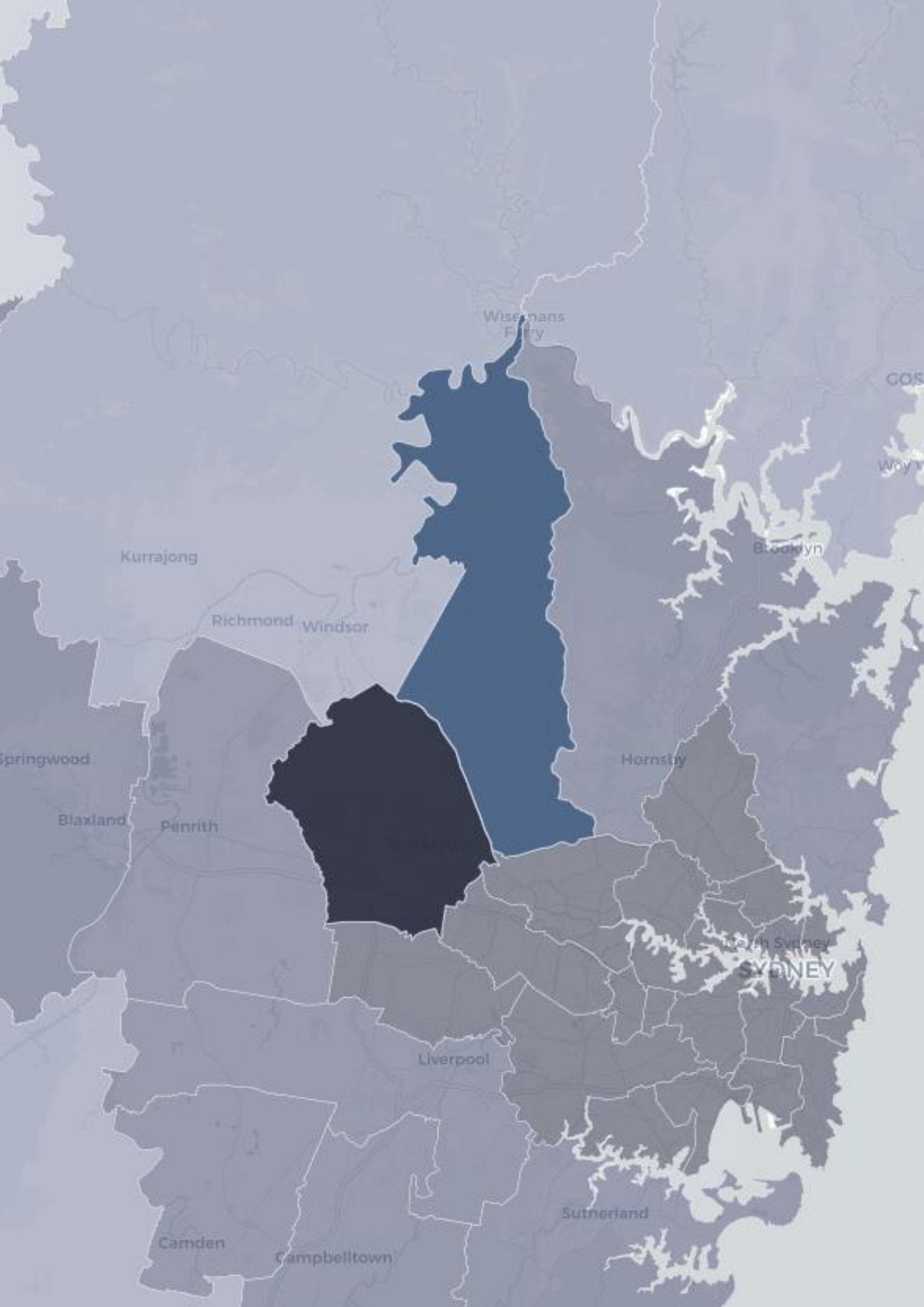
THE NORTH WEST

> 10% decline
0 - 10% decline
little/no change
0 - 10% growth
> 10% growth

10 YEARS OF CHANGE	2006	2011	2016
POPULATION			
 Total population	404,368	+10% 443,092	+12% 494,205
 Male/Female	M 200,392 203,976 F	M 219,675 223,417 F	M 245,025 249,180 F
 Median Age	← 34 →	← 35 →	← 36 →
MEDIAN WEEKLY INCOME			
 Personal Income	\$556	+17% \$651	+15% \$750
 Household Income	\$1,456	+20% \$1,753	+16% \$2,034
FAMILY HOUSEHOLD COMPOSITION			
 Couple with children	59,997	+10% 65,755	+13% 74,007
 One parent	17,005	+9% 18,493	+2% 18,888
 Couple without children	26,978	+8% 29,066	+4% 30,317
 Other family	1,445	+11% 1,600	+15% 1,838
 Average people per household	3.1	3.1	3.2
HOME OWNERSHIP			
 Private dwellings	123,511	+9% 134,604	+8% 144,820
 Owned outright	35,317	+6% 37,380	+5% 39,374
 Owned with a mortgage	55,500	+12% 62,282	+3% 64,425
 Rented	32,694	+7% 34,942	+17% 41,021
 Median monthly mortgage repayment	\$1,906	+23% \$2,350	-1% \$2,325
 Median weekly house rent	\$260	+45% \$378	+25% \$470
EDUCATION			
 School age (5-19 years) population	95,175	+5% 99,745	+8% 108,132
 Enrolments Government	43,556	+9% 47,458	+13% 53,744
 Enrolments Catholic	19,306	+5% 20,353	+5% 21,284
 Enrolments Other Non-Government	8,800	+8% 9,477	+23% 11,682

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Demographic & Education Trends in Sydney's North West

Population growth in the North West

The North West (which comprises of two LGAs, Blacktown City Council and The Hills Shire Council) is home to half a million people (495,205) and is one of Sydney's primary population growth corridors.

Over the past decade the population of the North West has increased by 89,837 people growing at a rate of 22% over ten years.

There is development of significant infrastructure in the North West including the Sydney Metro North West Rail Link, new housing developments in areas such as McGraths Hills, Box Hills, Riverstone and Marsden Park, and planned growth of the Norwest Business Park. The Department of Planning and Environment projects that the area's population will be on its way to reaching 1 million people in 2036 (812,250).

Family focused

The area's growth is in part a result of its strong family demographic. Six in ten households (60%) in the region contain children (both couple families with children and single parents) which is above average for both Sydney (45%) and NSW (43%). Over the past ten years, families with children have not only been the most common household type, but they have also been the largest growing households, increasing by 15,893 households.

An increasing number of households with children undergirds the growing number of children in the North West. Since 2006, the number of children under the age of 20 has increased from 126,695 (2006) up to 144,832 (2016). This has caused a subsequent rise in the total number of students living in the North

West area. Total student enrolments have increased from 71,662 (2006) to 86,710 (2016), an additional 15,048 students living in the North West.

Educational preferences

Two in five students are enrolled in non-government education (38%). This consists of a quarter who are enrolled in a Catholic education (25%) and over one in eight who are enrolled in independent school education (13%).

Independent school education is the fastest growing education affiliation in the North West, growing by 33% over the past ten years, compared to 26% growth in government enrolments and 10% growth in Catholic enrolments.

Growth in the number of non-government school students is partly linked to rising household incomes across the North West region and growing disposable income. Since 2006 median household income in the North West has risen from \$75,686 up to \$105,768 in 2016. This is highest in The Hills Shire where median household income is \$122,668 compared to \$94,484 in Blacktown.

Rising cultural diversity

As the North West has grown it has become increasingly culturally diverse. In 2006 a third of the total population was born overseas (33%). Today this proportion has increased to 39% of the population.

People moving into the North West from overseas are most likely to come from Asian countries. The top three migrant countries of birth are India (6%), Philippines (5%) and China (3%). Just these three countries alone

represent 14% of the population. These three countries are also the largest growing migrant countries of birth with the number of people born in India increasing by 21,764 people over the past ten years at a rate of 224%.

Diversity of language has also been increasing. The proportion of the population that speaks a language other than English at home has increased from 29% in 2006 to 38% in 2016. The most commonly spoken non-English languages in the North West are Hindi (3%), Mandarin (3%) and Tagalog (3%). Apart from Arabic, which is the 5th most commonly spoken non-English language, all ten of the most commonly spoken non-English languages in the North West area are Asian languages. The two largest growing are Mandarin (spoken by 14,833 people) and Punjabi (9,797).

Population projections for the North West

The population projections for the North West are likely to have a lasting impact on the educational landscape in the area. The total number of school aged children is projected to increase from 108,132 (2016) to 171,400 (2036). This is an increase of 59% over the next 20 years and gives an average annual increase in the student population of 3,164. The region's growing cultural diversity, growing preference for non-government education and rising household incomes are all likely to impact the future of independent education in the North West.

Methodology

Geographical boundaries

The data used in this report relates to Sydney's North West Region which, for this report, is comprised of The Hills Shire Council Local Government Area (LGA) and the Blacktown City Council Local Government Area (LGA).

Census results

The demographic data used in this report has been obtained from the Australian Bureau of Statistics' Census of Population and Housing 2006, 2011 and 2016.

Population projections

Future population projections for the North West are based on the New South Wales Department of Planning and Environment's document: *2016 New South Wales State and Local Government Area Population Projections*.

The projections outlined by the New South Wales Department of Planning and Environment have been compared to current Census data to calculate expected growth rates and future population figures.

Terminology

Throughout this report the two Local Government Areas, The Hills Shire Council and Blacktown City Council, have been referred to as the North West.

The individual Local Government Areas in this report, including The Hills Shire Council and the Blacktown City Council, been referred to as The Hills Shire and Blacktown.

Sydney's North West

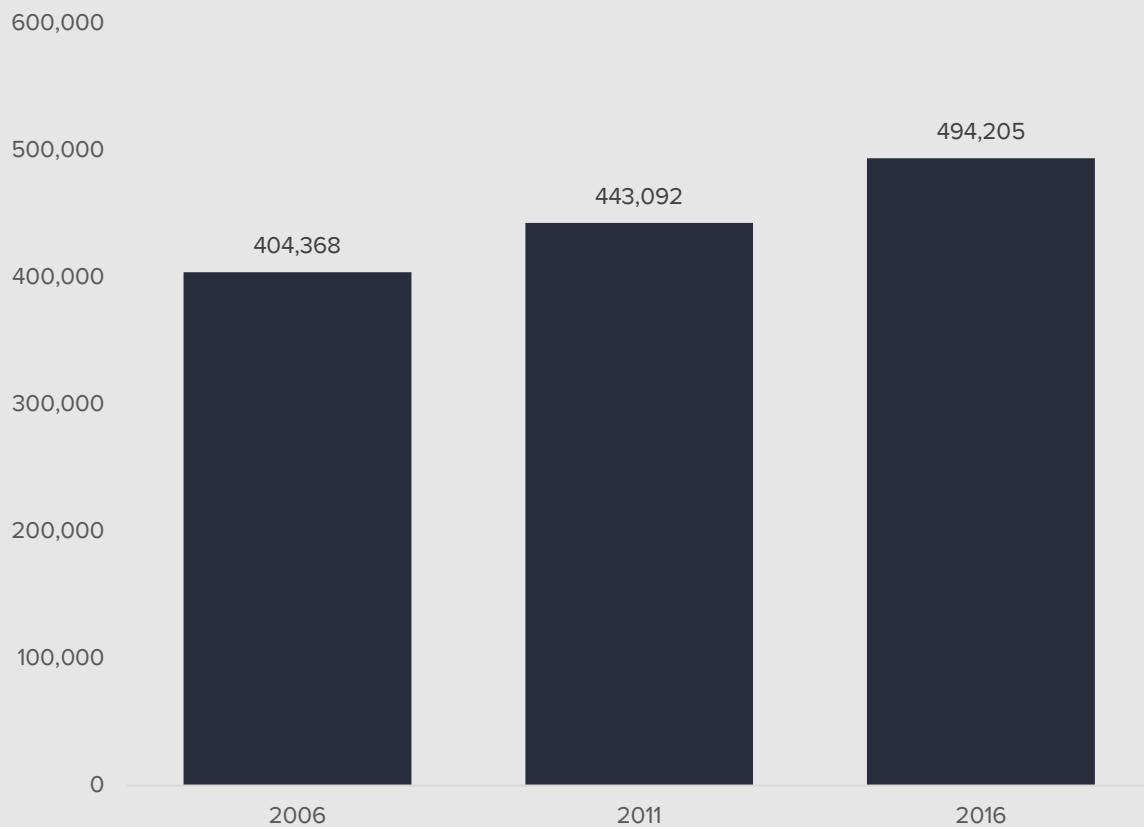
Population growth

The Hills Shire and Blacktown combined have a total population of nearly half a million people (494,205) which is more than the current population of Canberra (415,900).

Over past decade (2006 to 2016) this population has grown by 89,837 people at a rate of 22% over ten years. That's an average of 9,000 new people every year (8,984), which is like adding new Stanhope Gardens (9,160) or Beaumont Hills (9,038) every year.

Population growth in the North West has been accelerating in recent years growing at a five-year rate of 12% (2011 to 2016) compared to 10% during the previous five-year period (2006 to 2011).

North West population growth (2006 to 2016)



Age profile

Average median age in the North West is 36-year-old, which is two years below both the state and national medians (38). Over the past decade the average median age in the area has risen by two years from 34-years-old in 2006.

The rise in average median age has been driven by a slightly ageing population in The Hills Shire. Median age in The Hills Shire is on par with the national median at 38-years-old and has risen by three years over the past ten years (35 in 2006). In Blacktown the median age is much lower, just 33-years-old and this has only changed by one year since 2006 (32).

Median age

Area	2006	2011	2016	# Change 2006 - 2016
The Hills Shire	35	37	38	3
Blacktown	32	32	33	1
New South Wales	37	38	38	1

Population growth by age

While the Hills has a large and growing population of retirees, the lower median age than comparable areas is due to a large population of children and growth in young families. Blacktown has an even higher proportion of children. There are 144,832 children (aged 0 to 19) living in the North West. As a proportion of the total population children represent nearly three in ten people (29%). Over the past decade the number of children in the North West has grown by 18,137 from 126,695 (2006) up to 144,832 (2016) at a rate of 14% over ten years.

At the other end of the age spectrum, in 2006 the number of retirement aged residents in the North West represented less than one-tenth of the total population (8%). Today this proportion has grown by three percentage points reaching 11% (2016).

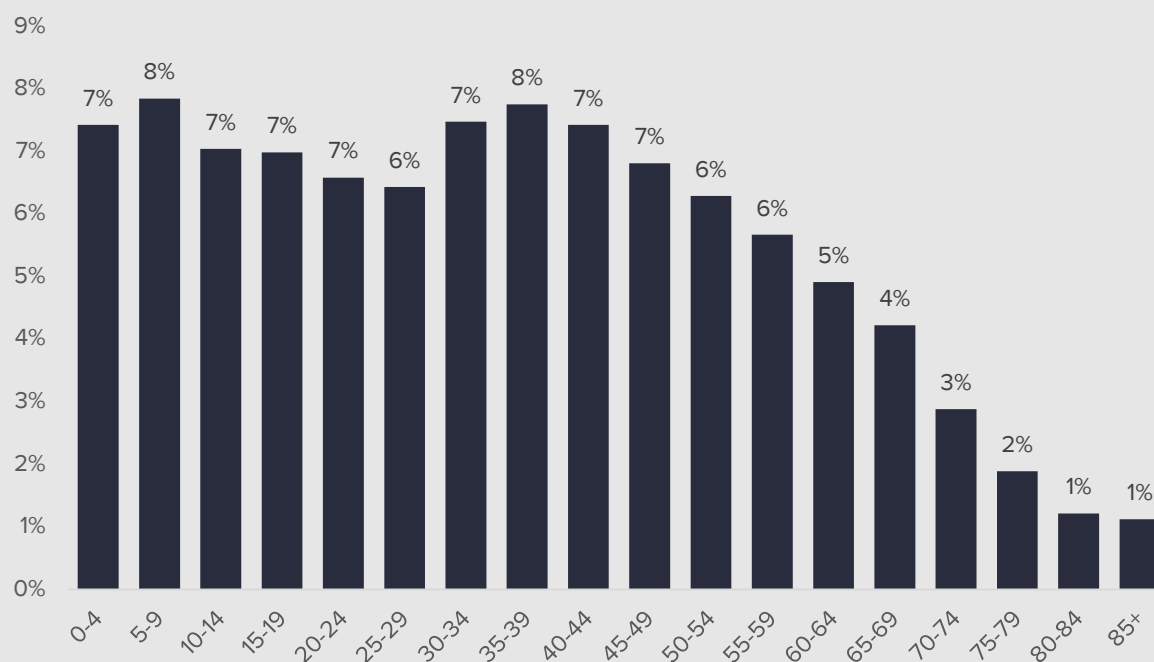
While the proportions of the population have shifted slightly over the past ten years, there has been numerical growth in every single age bracket.

Proportionally, the fastest growing age brackets are all over the age of 60. The fastest growing age bracket in the North West is 85+ (85%). This rapid proportional growth, however, is a result of the relatively small base population in 2006 (5,553 people), increasing by 2,550 between 2006 and 2016. Most other age groups have increased by a numerically larger amount.

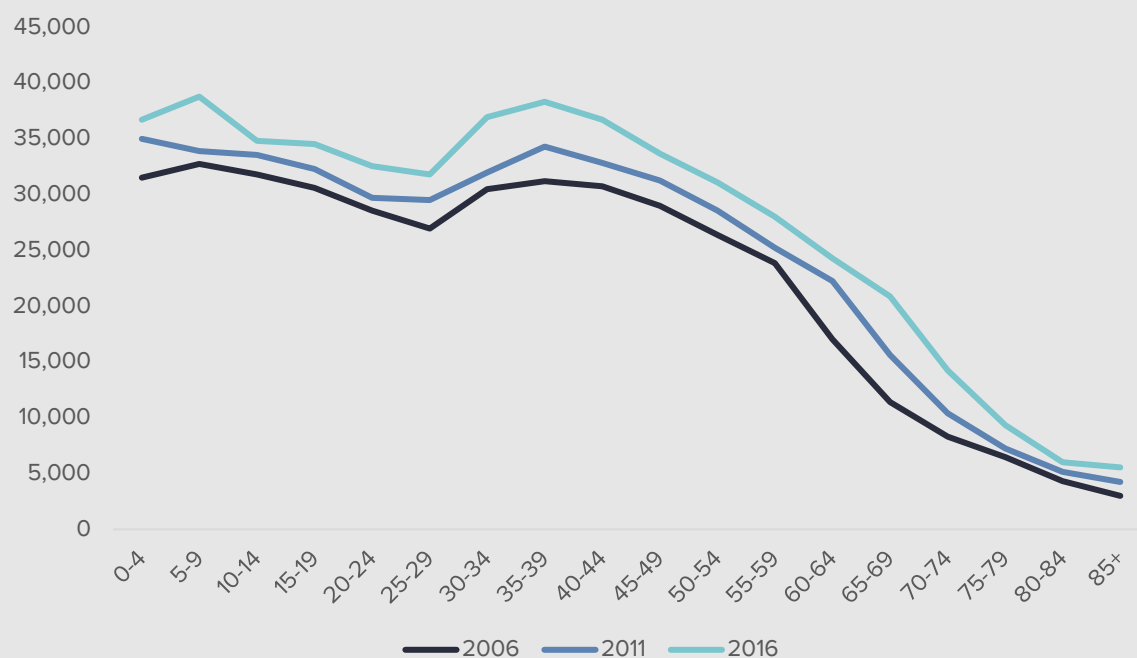
The second fastest growing age group, aged 65 to 69, has grown by 83% over ten years. In addition to the fastest growth, the number of 65 to 69-year-olds has increased by the largest numerical amount (9,477).

Looking at numerical growth by age, the impact of Gen Alpha (those born from 2010) can be observed. Since 2006 the number of children under the age of 10 has grown by 11,211 children from 64,267 (2006) up to 75,478 (2016). This emerging peak in the population distribution by age will continue to impact the North West educational landscape over the coming years.

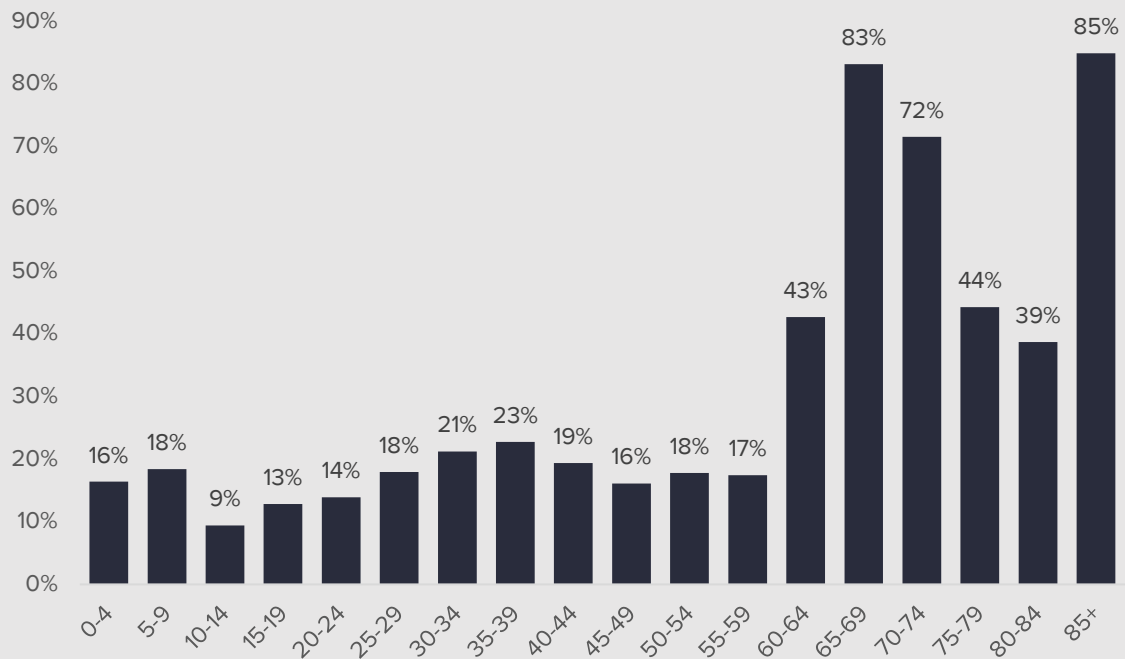
Proportion of the population by age (2016)



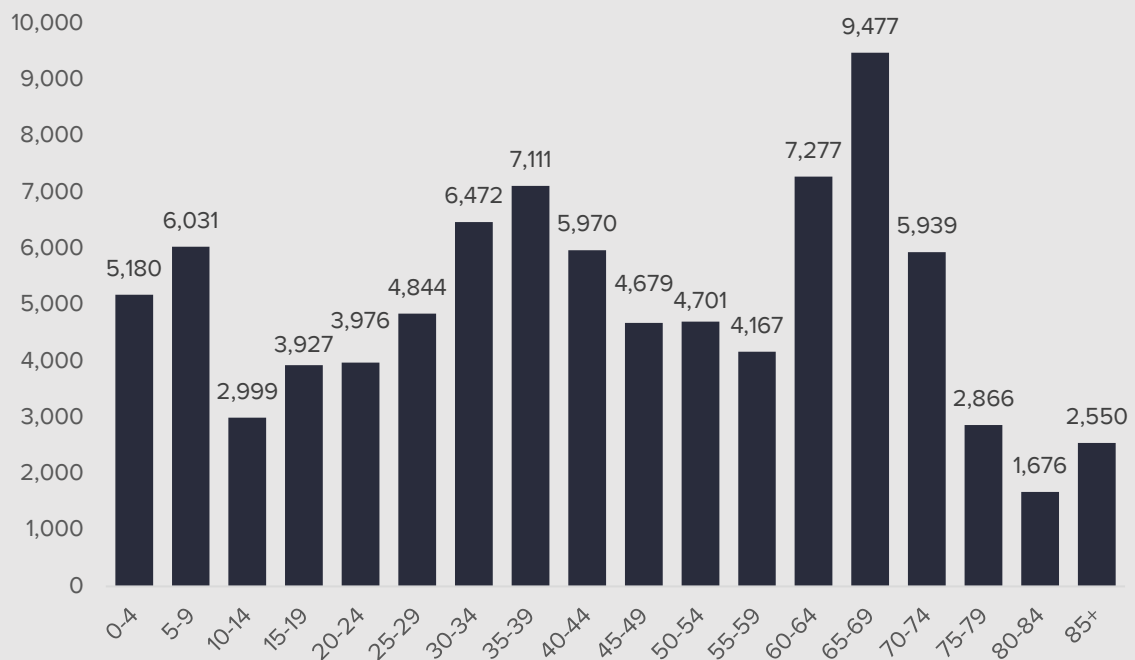
Number of people by age (2006 to 2016)



Proportional growth in the population by age (2006 to 2016)



Numerical growth in the population by age (2006 to 2016)



Student enrolments

The North West is home to 86,710 school students. Nearly two in five students living in the North West are enrolled in a non-government school (38%). A quarter are enrolled in a Catholic affiliated school (25%) and one in eight are enrolled in an independent school (13%).

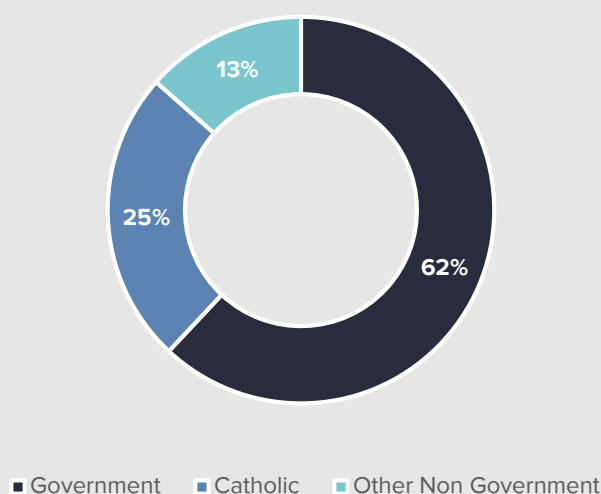
In the Hills Shire, 42% of school students are enrolled in a non-government school with 24% enrolled in Catholic education and 18% enrolled in independent. The proportions are slightly lower overall in Blacktown with Catholic enrolments representing 27% and independent enrolments comprising 11%.

Independent education in the North West is the fastest growing educational affiliation. Over the past decade the number of students enrolled in an independent school has grown by 33% from 8,800 in 2006 to 11,682 in 2016, an increase of 2,882.

Government enrolments have grown by 10,188 students over the past ten years compared to 4,860 additional non-government students with most of this growth from primary school students. The total number of government affiliated primary school students increased by 6,666 over the past decade compared to 1,952 non-government primary enrolments.

In the secondary school sector, however, growth has been more even across the sectors. Over ten years secondary government enrolments have increased by 3,522 from 16,820 (2006) up to 20,342 (2016). Meanwhile non-government enrolments have grown by 2,908 (just 614 less) from 14,060 (2006) up to 16,968 (2016).

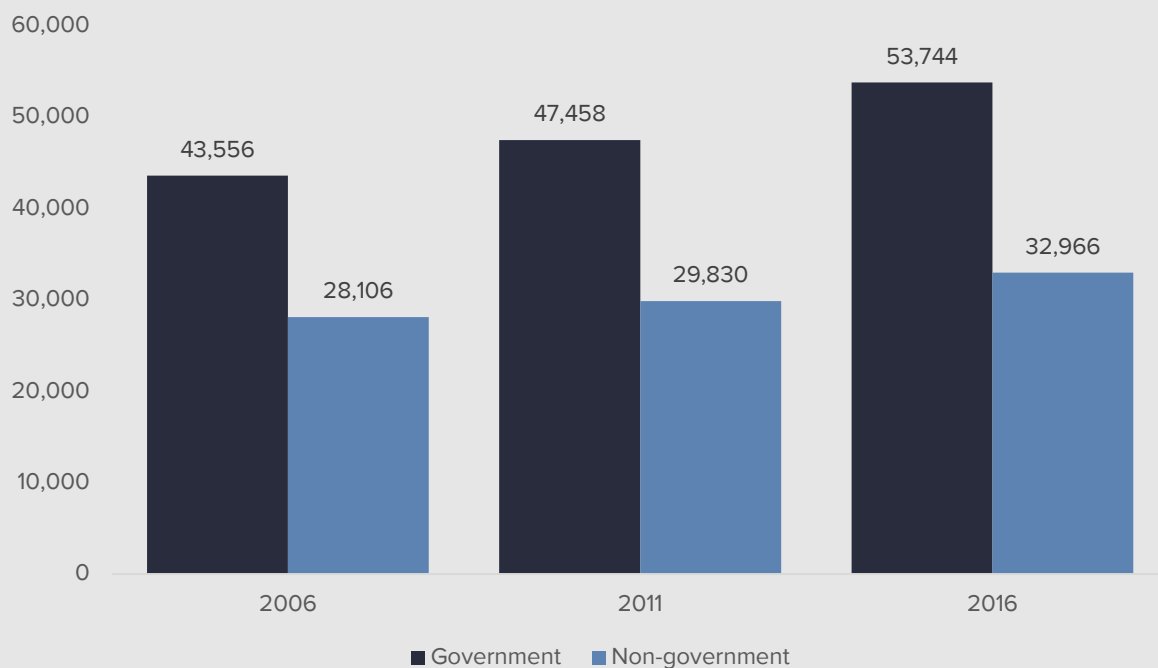
Student enrolments by affiliation (2016)



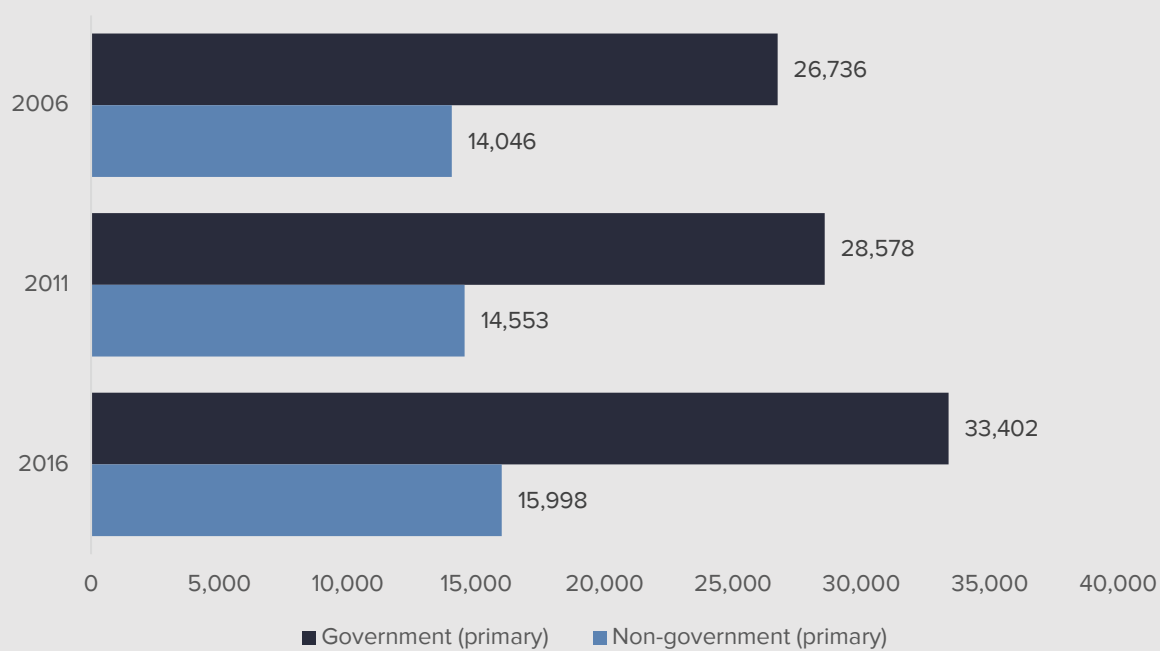
Student enrolments by affiliation (2006 to 2016)

North West	2006	2011	2016	# Change 2006 - 2016	% Change 2006 - 2016
Preschool	8,113	9,306	9,757	1,644	20%
Primary					
Government	26,736	28,578	33,402	6,666	25%
Catholic	9,958	10,076	10,358	400	4%
Independent	4,088	4,477	5,640	1,552	38%
Total (Primary)	40,782	43,131	49,400	8,618	21%
Secondary					
Government	16,820	18,880	20,342	3,522	21%
Catholic	9,348	10,277	10,926	1,578	17%
Independent	4,712	5,000	6,042	1,330	28%
Total (Secondary)	30,880	34,157	37,310	6,430	21%
Total school enrolments (Primary/Secondary)	71,662	77,288	86,710	15,048	21%

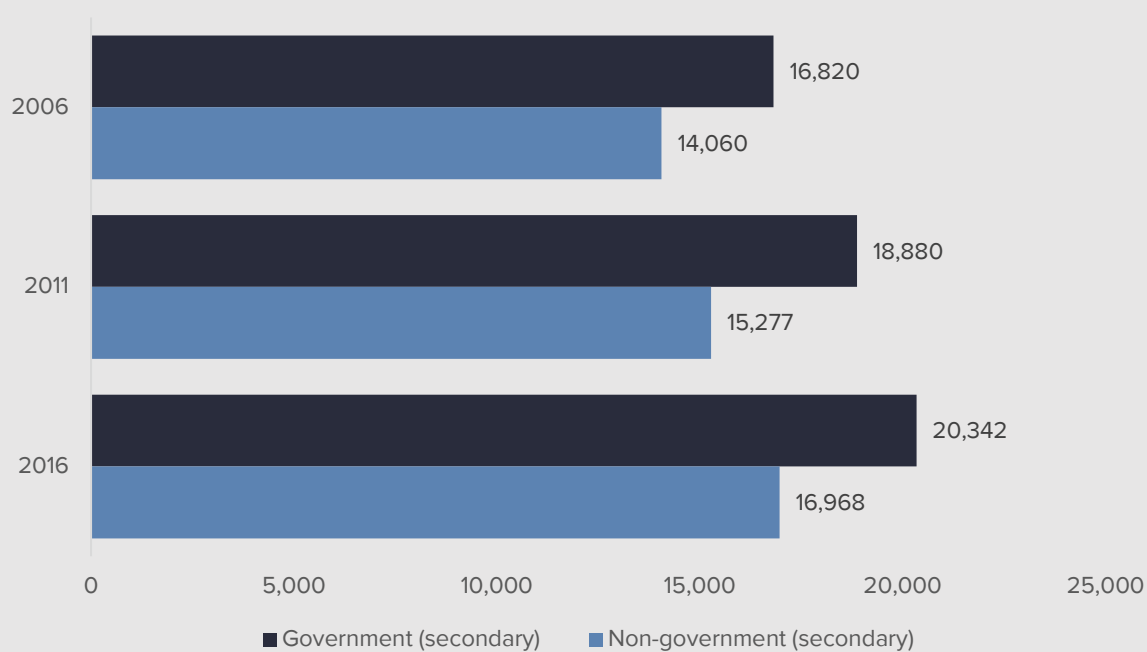
Number of students by affiliation (2006 to 2016)



Primary enrolments by affiliation (2006 to 2016)



Secondary enrolments by affiliation (2006 to 2016)



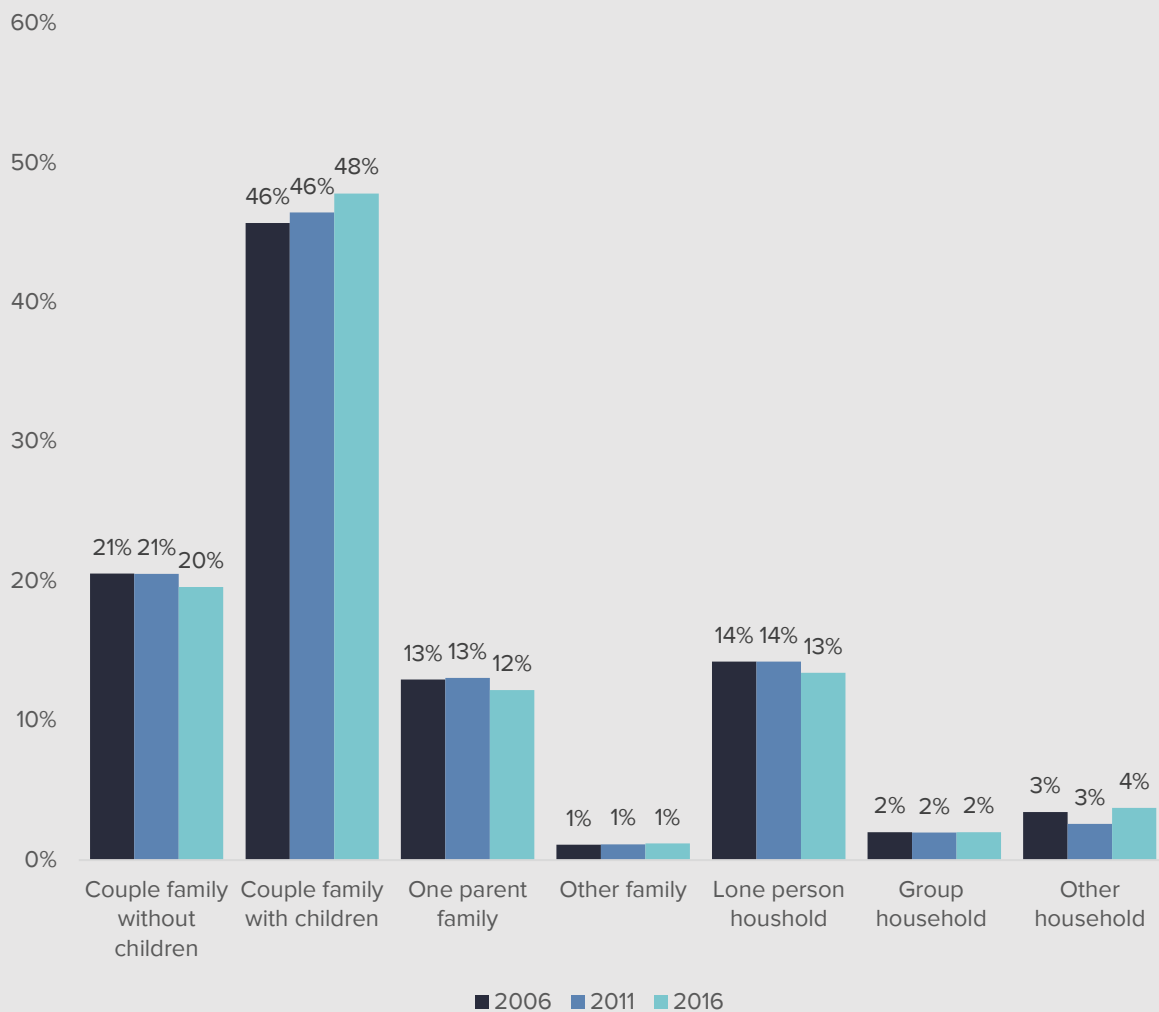
Household composition

There are 154,749 households in the North West and half are couple families with children (48%). This is 13 percentage points higher than the average for Sydney (35%) and higher again than the average across New South Wales (32%).

When couple families with children are combined with one parent families, the proportion of households that are home to children is 60% (cf. 45% Sydney and 43% NSW).

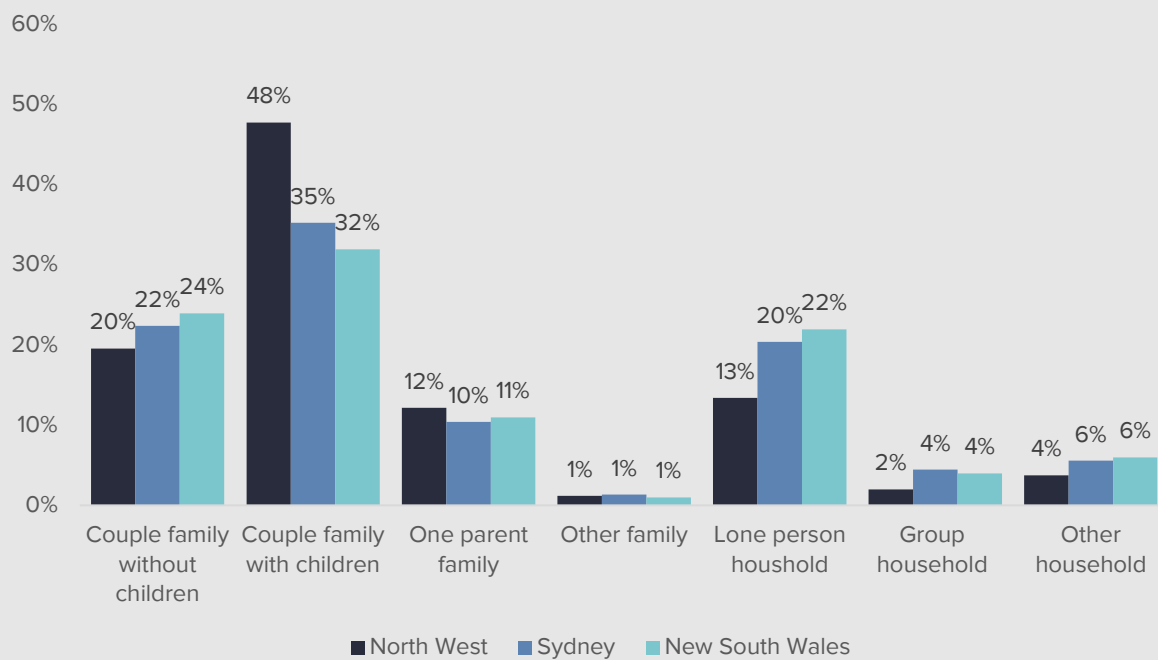
Not only do households with children in North West represent the largest proportion of households, but they are also the largest growing household type. Over the past ten years the number of couple families and one parent families combined has increased by 15,893 families (14,010 couples with children and 1,883 single parents) compared to an increase of only 3,339 of couples without children and an increase of 2,079 of lone persons.

Household composition (2006 to 2016)



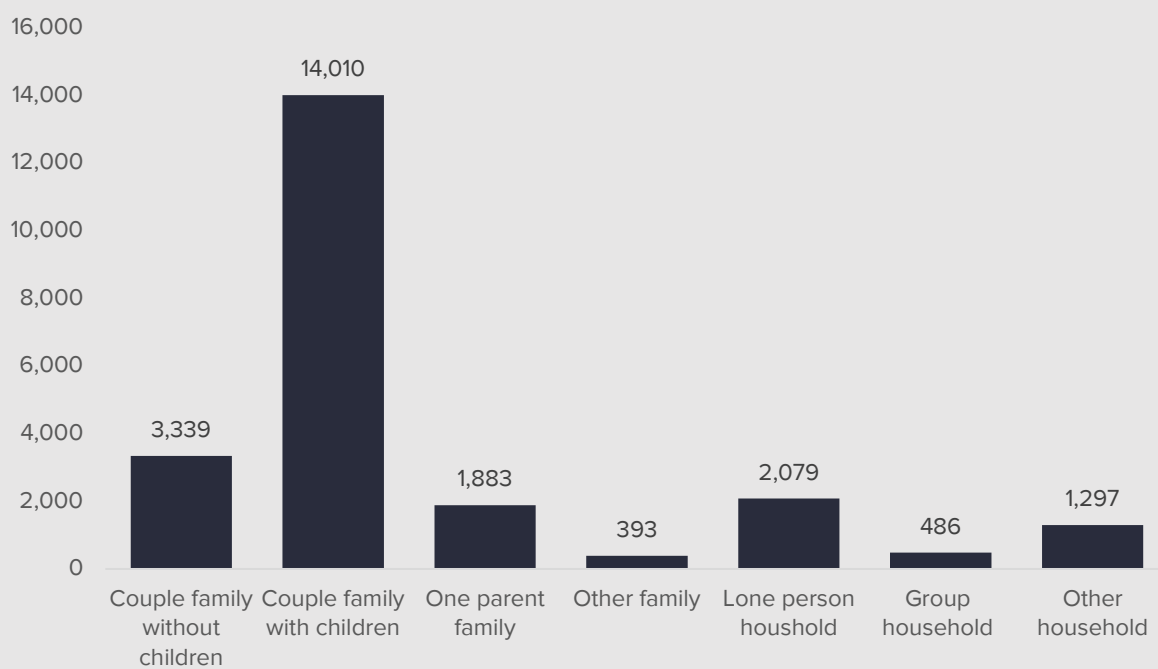
Comparison of household composition (2016)

North West, Sydney and New South Wales.



Growth in household types in North West (2006 to 2016)

Numerical change between 2006 and 2016.



Household income

Median household income in the North West has risen by 40% over the past ten years. From \$75,686 p.a. in 2006 up to \$105,768 p.a. per household in 2016.

While median household income has been increasing over the past decade, so too has

median household expenditure. Median rental prices have risen by 81% over the past ten years, from \$260 per week (2006) to \$470 per week (2016). Median monthly mortgage repayments have also gone up from \$1,906 (2006) to \$2,352 (2016), an increase of 22%.

Selected medians (income)

North West	2006	2011	2016	# Change 2006 - 2016	% Change 2006 - 2016
Median personal income	\$28,912	\$33,852	\$38,974	\$10,062	35%
Median family income	\$80,834	\$97,474	\$111,306	\$30,472	38%
Median household income	\$75,686	\$91,156	\$105,768	\$30,082	40%

The Hills Shire	2006	2011	2016	# Change 2006 - 2016	% Change 2006 - 2016
Median personal income	\$33,228	\$38,324	\$43,004	\$9,776	29%
Median family income	\$98,800	\$117,364	\$128,128	\$29,328	30%
Median household income	\$93,288	\$110,240	\$122,668	\$29,380	31%

Blacktown	2006	2011	2016	# Change 2006 - 2016	% Change 2006 - 2016
Median personal income	\$24,596	\$29,380	\$34,944	\$10,348	42%
Median family income	\$62,868	\$77,584	\$94,484	\$31,616	50%
Median household income	\$58,084	\$72,072	\$88,868	\$30,784	53%

Selected medians (expenditure)

North West	2006	2011	2016	# Change 2006 - 2016	% Change 2006 - 2016
Median monthly mortgage repayments	\$1,906	\$2,350	\$2,325	\$419	22%
Median weekly rent	\$260	\$378	\$470	\$210	81%

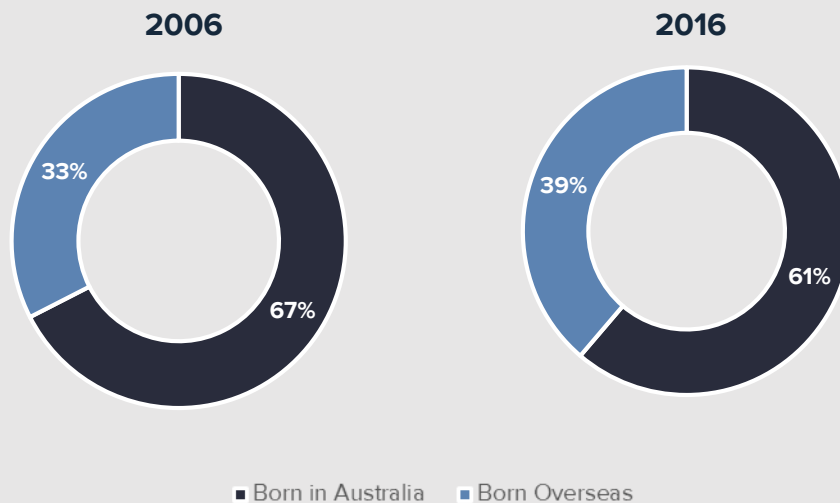
Cultural diversity

Two in five people living in the North West were born outside of Australia (39%). This has increased from a third of the population in 2006 (33%). Today there are 191,543 residents of the North West who were born overseas. This has grown by 60,000 people over the past ten years an increase of 46%. This means that the North West migrant community is growing 24 percentage points faster than overall population growth (22%).

The top three countries of birth of North West residents born overseas are all Asian countries. The top three countries alone (India, Philippines and China) represent 14% of the total population.

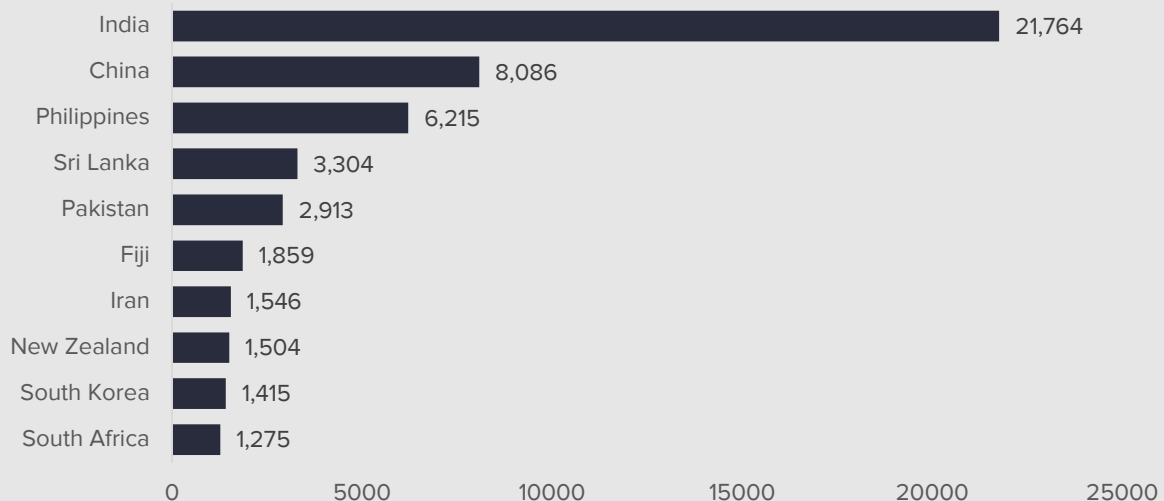
The top five largest growing countries of birth of North West residents are India (+21,764), China (+8,086), Philippines (+6,215), Sri Lanka (+3,304) and Pakistan (+2,913).

Proportion of the population born overseas



Top 10 largest growing migrant countries of birth (2006 to 2016)

By numerical increase (2006 to 2016).



Top 10 migrant countries of birth

	2006	2011	2016
1.	Philippines (4%)	Philippines (5%)	India (6%)
2.	United Kingdom (3%)	India (4%)	Philippines (5%)
3.	India (2%)	United Kingdom (3%)	China (3%)
4.	New Zealand (2%)	New Zealand (2%)	United Kingdom (3%)
5.	Fiji (1%)	Fiji (2%)	New Zealand (2%)
6.	China (1%)	China (2%)	Fiji (2%)
7.	Sri Lanka (1%)	Sri Lanka (1%)	Sri Lanka (1%)
8.	Malta (1%)	South Africa (1%)	Pakistan (1%)
9.	South Africa (1%)	South Korea (1%)	South Africa (1%)
10.	Italy (1%)	Malta (1%)	South Korea (1%)

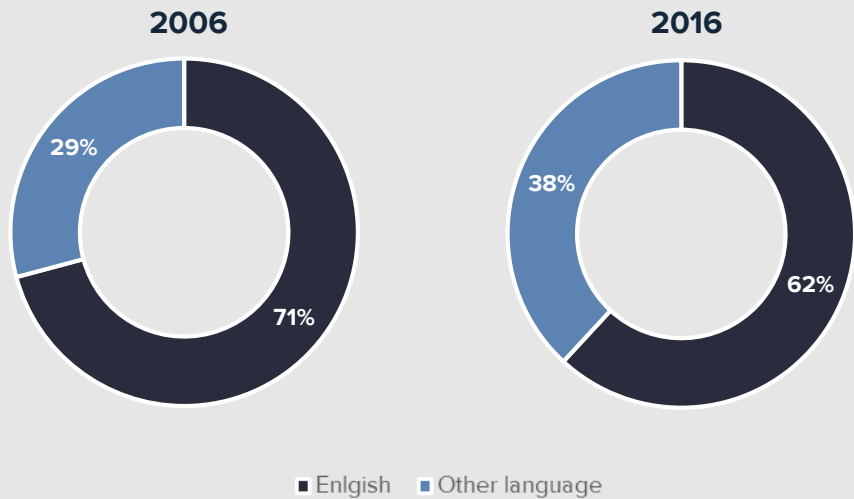
Top 10 largest growing migrant countries of birth

	Country	2006	2011	2016	# Change 2006 - 2016	% Change 2006 - 2016
1.	India	9,700	18,720	31,464	21,764	224%
2.	China	4,639	6,839	12,725	8,086	174%
3.	Philippines	18,088	2,1457	24,303	6,215	34%
4.	Sri Lanka	3,925	5,413	7,229	3,304	84%
5.	Pakistan	1,882	2,998	4,795	2,913	155%
6.	Fiji	6,008	7,191	7,867	1,859	31%
7.	Iran	1,679	2,220	3,225	1,546	92%
8.	New Zealand	8,817	9,634	10,321	1,504	17%
9.	South Korea	2,526	3,109	3,941	1,415	56%
10.	South Africa	2,962	3,971	4,237	1,275	43%

Language diversity

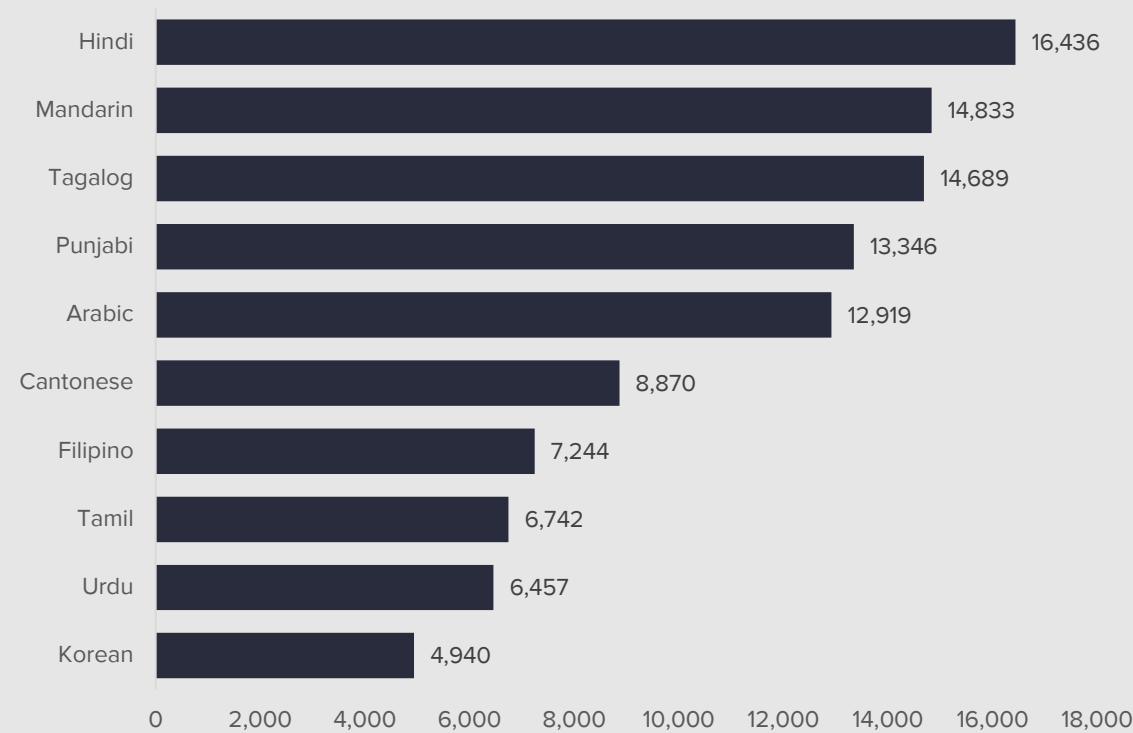
As the number of people who were born overseas has increased, so too has the number of people who speak a language other than English at home. Today 38% of the population in the North West speak a language other than English at home. This is an increase of nearly 10 percentage points since 2006 (29%).

Proportion of the population that speak a language other than English



Top 10 largest growing non-English languages (2006 to 2016)

By numerical increase.



Top 10 non-English languages

	2006	2011	2016
1.	Arabic (3%)	Tagalog (3%)	Hindi (3%)
2.	Tagalog (3%)	Hindi (3%)	Mandarin (3%)
3.	Hindi (2%)	Arabic (3%)	Tagalog (3%)
4.	Cantonese (2%)	Cantonese (2%)	Punjabi (3%)
5.	Filipino (2%)	Punjabi (2%)	Arabic (3%)
6.	Italian (1%)	Mandarin (2%)	Cantonese (2%)
7.	Mandarin (1%)	Filipino (2%)	Filipino (1%)
8.	Spanish (1%)	Tamil (1%)	Tamil (1%)
9.	Punjabi (1%)	Italian (1%)	Urdu (1%)
10.	Samoan (1%)	Spanish (1%)	Korean (1%)

Top 10 largest growing non-English languages

	Language	2006	2011	2016	# Change 2006 - 2016	% Change 2006 - 2016
1.	Mandarin	4,475	7,056	14,833	10,358	231%
2.	Punjabi	3,549	7,894	13,346	9,797	276%
3.	Hindi	8,416	12,729	16,436	8,020	95%
4.	Urdu	2,429	4,118	6,457	4,028	166%
5.	Tagalog	10,739	12,993	14,689	3,950	37%
6.	Tamil	2,838	4,426	6,742	3,904	138%
7.	Bengali	1,571	2,442	3,939	2,368	151%
8.	Persian	2,001	2,713	3,964	1,963	98%
9.	Arabic	11,029	12,243	12,919	1,890	17%
10.	Korean	3,066	3,851	4,940	1,874	61%

Future population projections

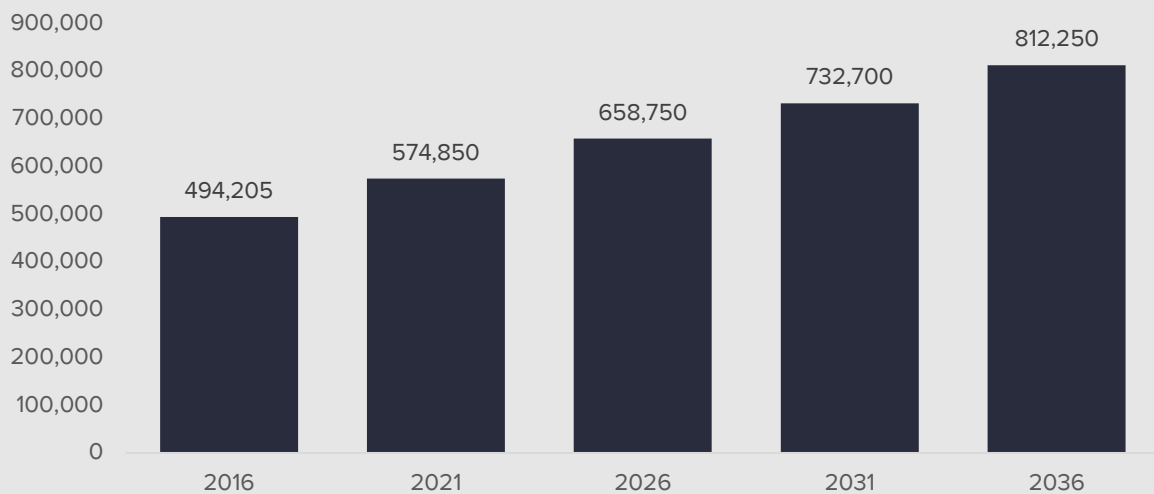
The New South Wales Department of Planning and Environment projects that the combined population of the North West (The Hills Shire and Blacktown) will be 812,250 in 2036. That's an additional 318,045 people and an increase of 64% over 20 years.

By 2036, Blacktown is projected to reach 521,400 people and The Hills Shire is projected to reach 290,850.

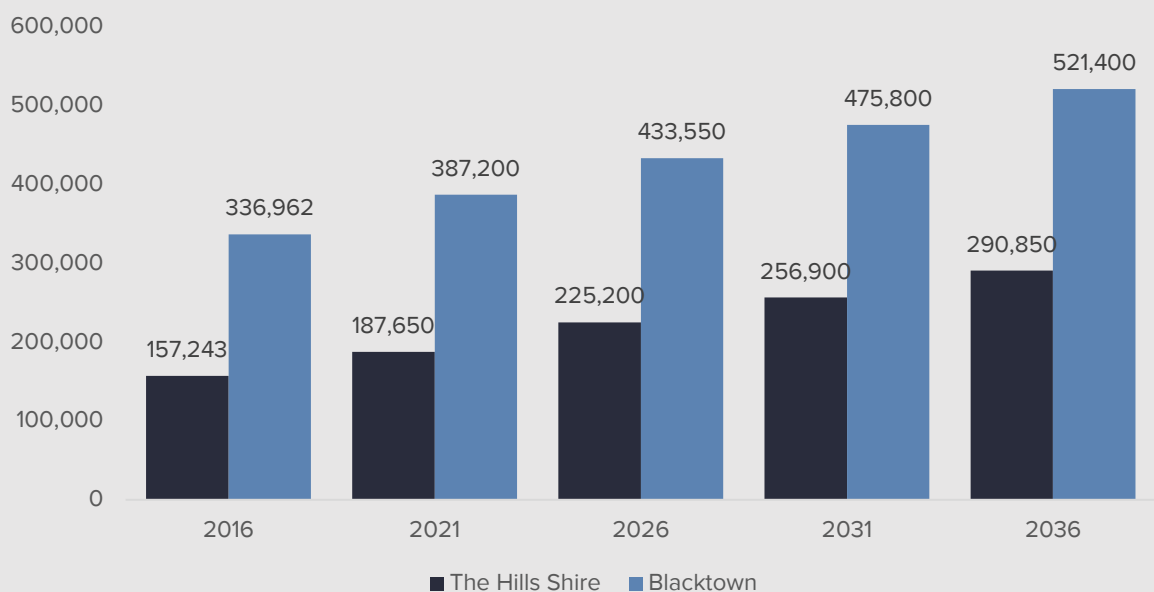
In 2026 the population is projected to be 658,750 which is an increase of 164,545 at a rate of 33% over ten years.

Blacktown is projected to reach 433,550 in 2026 and The Hills Shire is projected to be 225,200 in the same year.

Growth in the North West (2016 to 2036)



Growth in the North West by LGA (2016 to 2036)



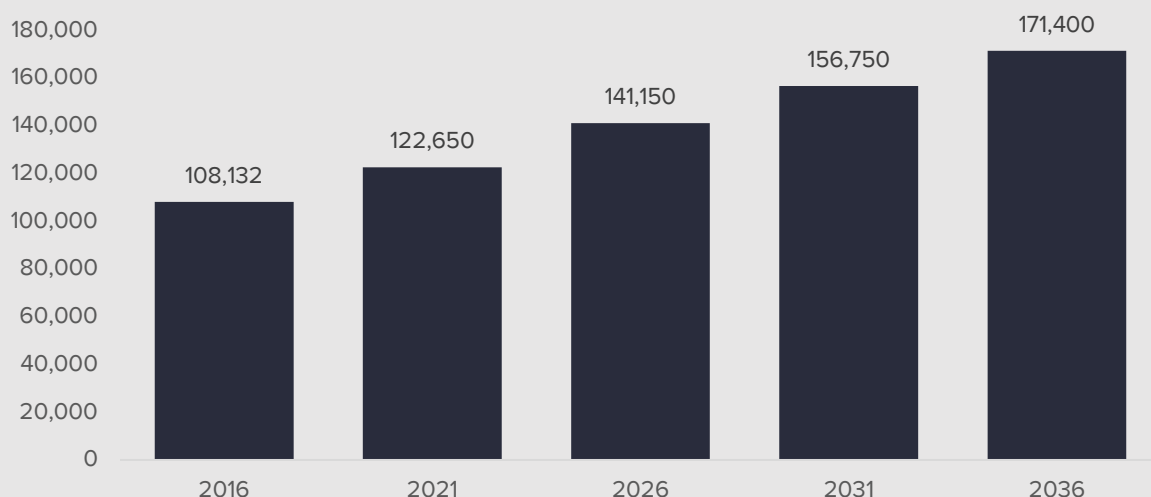
Growth in the school aged population

The school aged population (those age 5 to 19) is also projected to continue growing over the next 20 years. In 2036 there will be 171,400 school aged children living in the North West (110,000 Blacktown and 61,400 The Hills Shire).

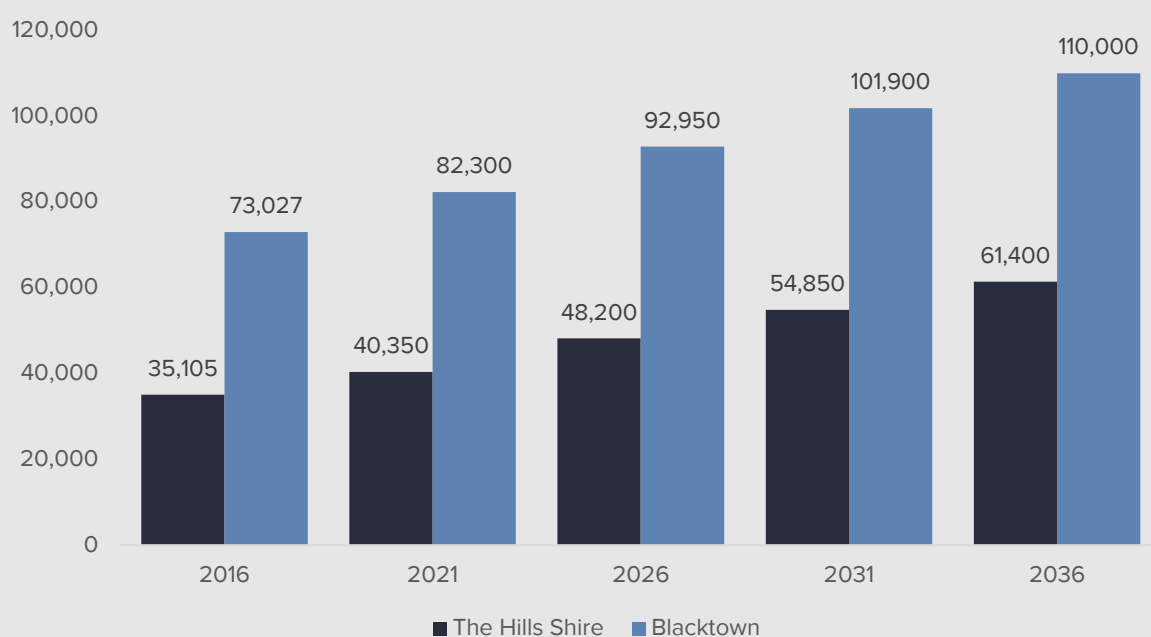
Growth is projected to be faster in the Hills where the school aged population is projected to grow by 75% over the next 20 years. In

Blacktown, growth will still be strong, increasing at a rate of 51% over 20 years. Numerically, growth is projected to be largest in Blacktown where the school aged population is projected to increase by 36,973 children while the number of children in The Hills Shire is projected to increase by 26,295 over 20 years.

Growth in school aged children in the North West (2016 to 2036)



Growth in school aged population by LGA (2016 to 2036)





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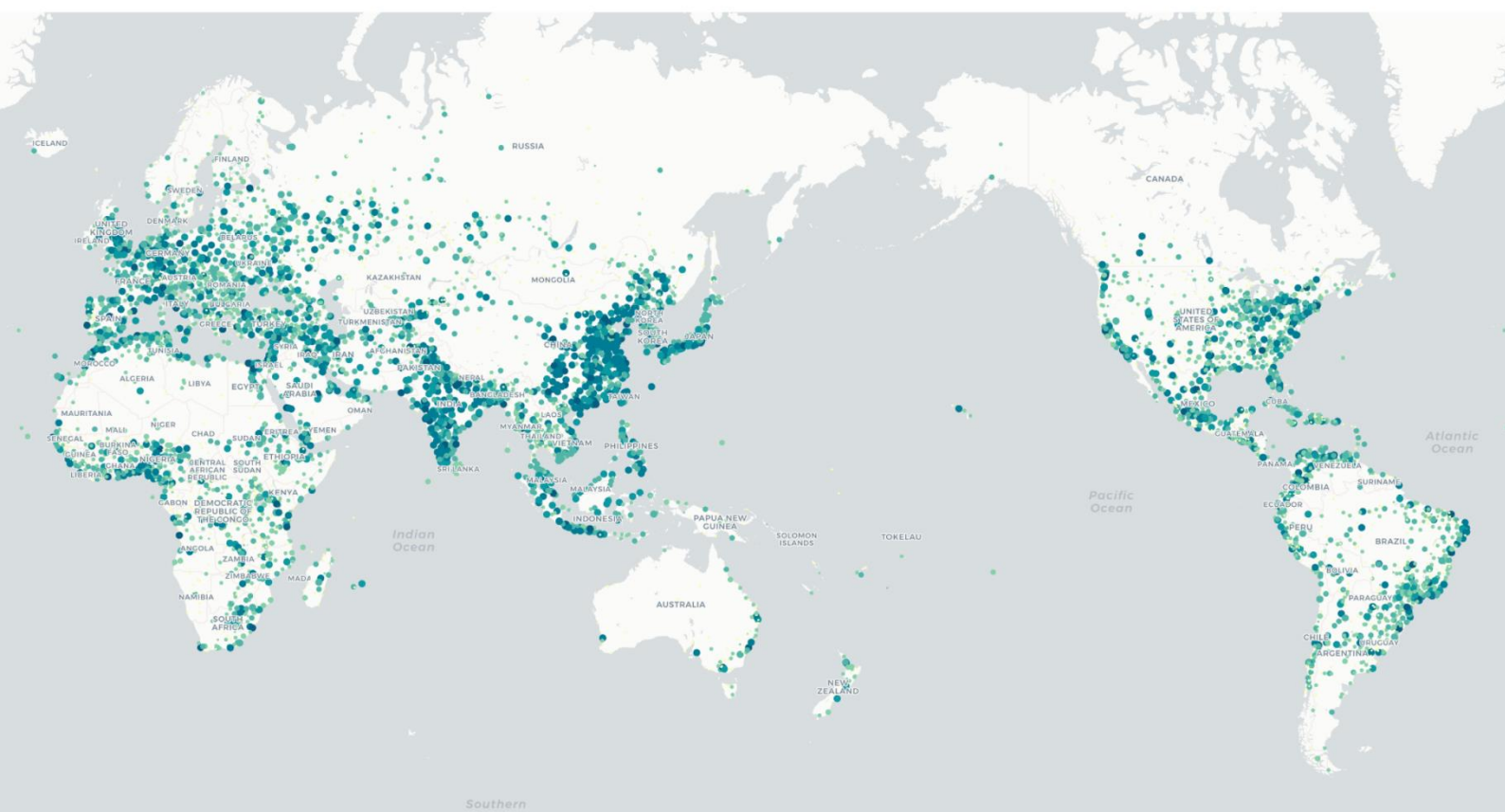
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- ✓ We analysed the demographic and lifestyle characteristics of Sydney's modern apartment dwellers for an industry body and then used these trends to project future changes to apartment and detached housing.
- ✓ We created a business performance sentiment index (PSI) for a local government with a nuanced understanding of business performance and conditions, allowing the local government to benchmark themselves against other regions and track the impact of policies and investment over time.
- ✓ We guided an Independent rural school in regional NSW to better understand the demographic changes in their local government area over the last 15 years and using these trends to project changes to the school-aged population over the next 15 years.
- ✓ We helped a leading fast-food restaurant chain understand how demographic trends are impacting the financial success of their stores.



We live in an era of rapid change.

Census Scan.

Demographic changes in our population and generational profiles impacts Australian households, communities and organisations.

A clear understanding of the demographic context in which you operate will improve organisational relevance and responsiveness.

Our unique *Census Scan* combines the latest data from the Australian Bureau of Statistics with rich historical data to identify key trends relevant to your industry.

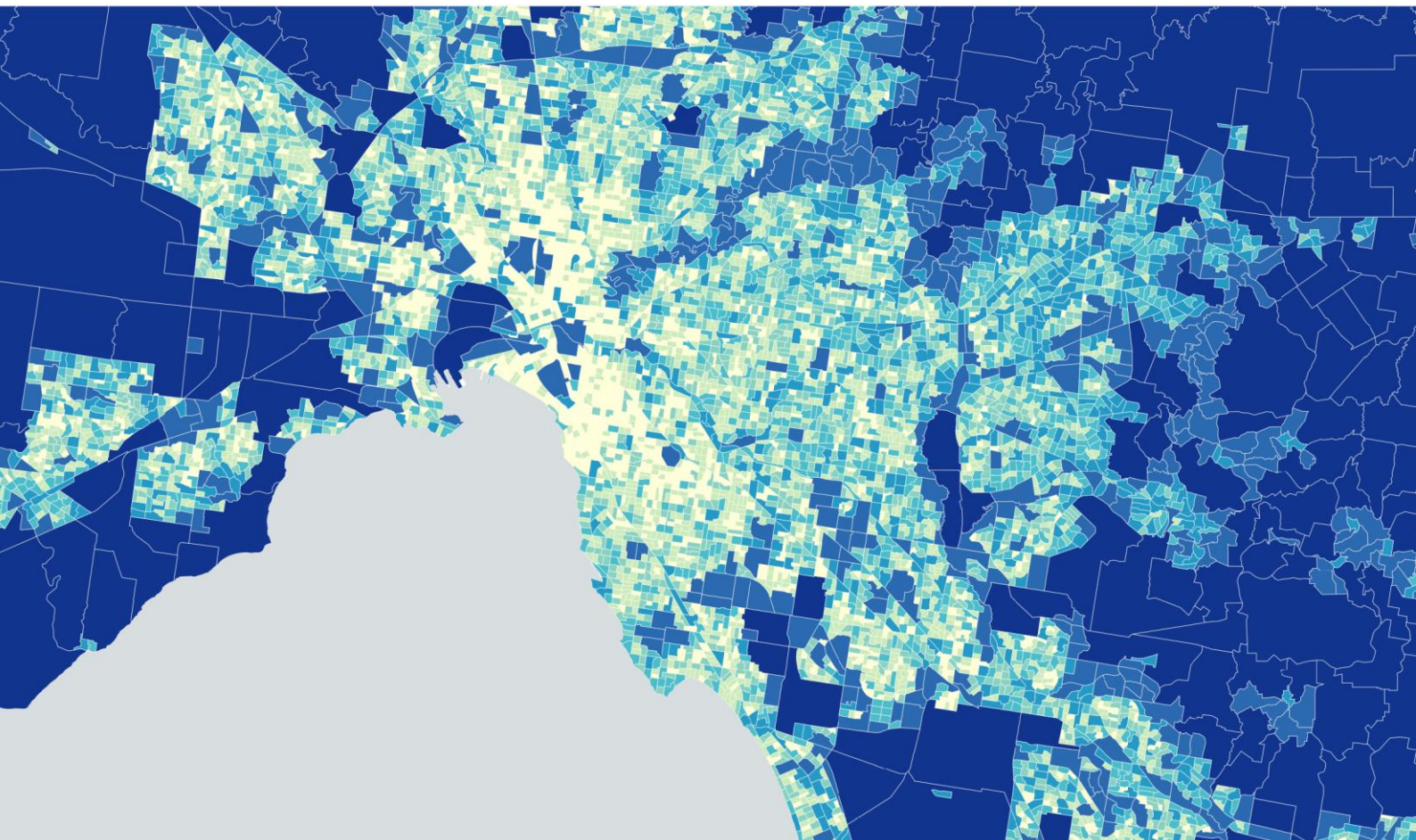
These reports are ideal for strategic planning, and market and competitor analysis.

Geo-spatial analysis.

Our geospatial analysis enables us to analyse, visualise, and interpret data.

Combining research with design allows us to overlay data onto geographic maps to enable the insights to be seen.

We take complex data tables and transform them into powerful business insights.



We replace guesswork with evidence; we let the data do the talking.

Customised index development.

People today are flooded with 'big data'.

We find the patterns in the data and integrate them into a unique index to help futureproof your organisation.

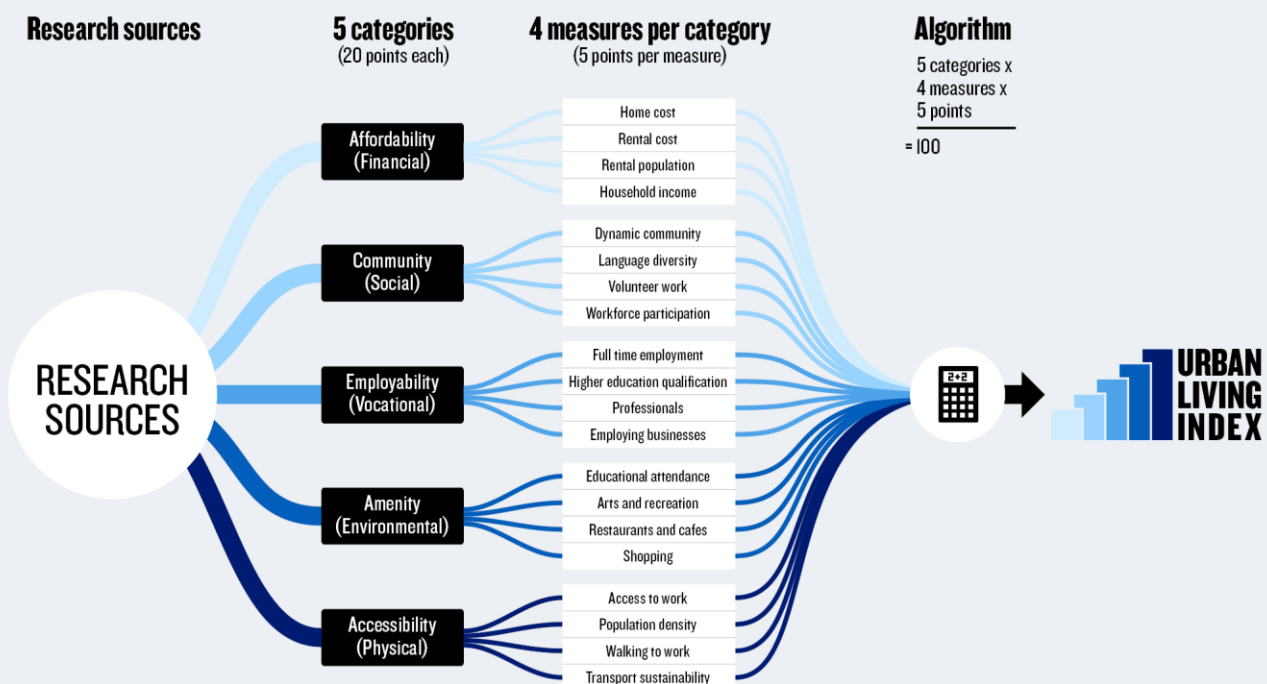
We can create indices that merge your organisation's internal data with external data to identify key trends, opportunities, and challenges.

Future forecasting.

The future is not a place we arrive at but something we create.

As researchers, we do more than help leaders observe the trends that are shaping our society. We help them play a dynamic role in enacting change.

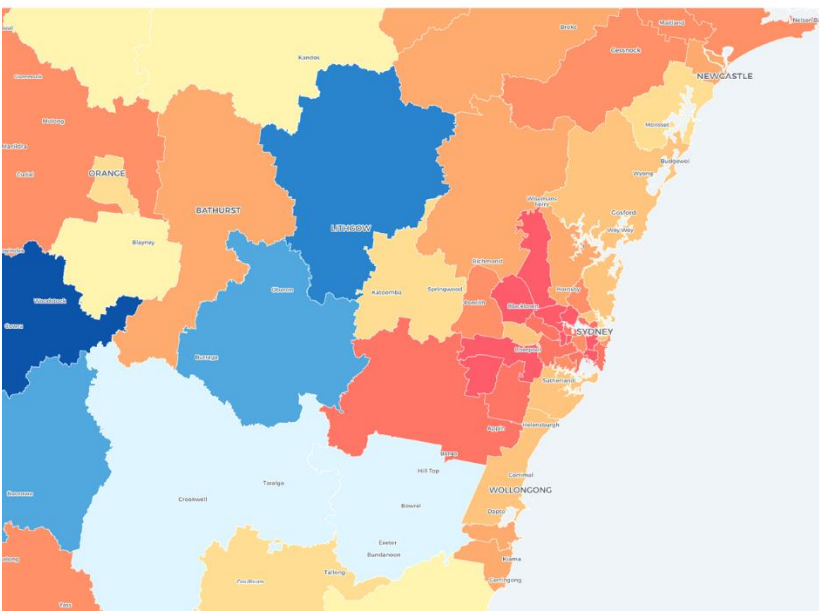
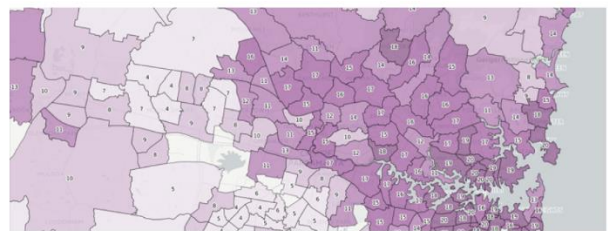
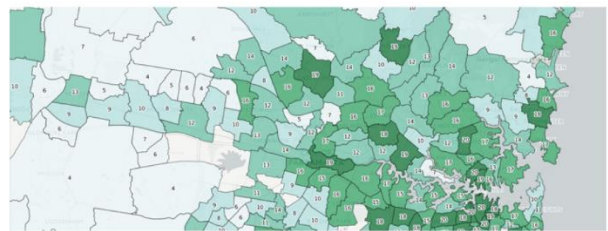
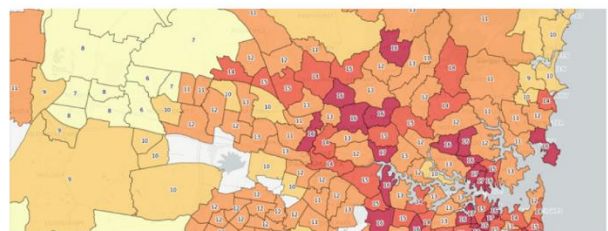
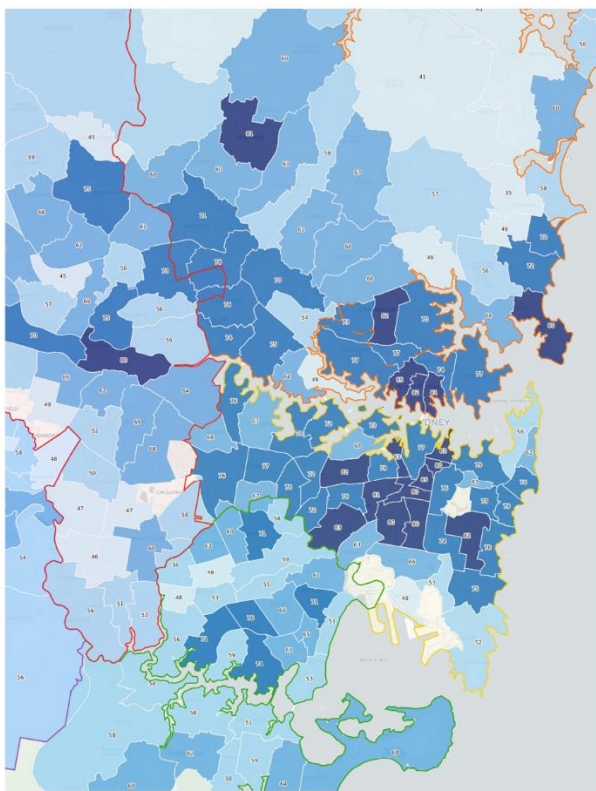
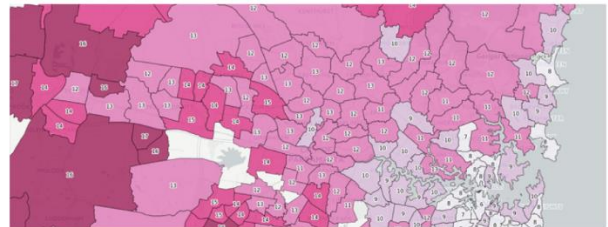
Drawing on our team's skill and experience, we identify not just current needs but future opportunities.



Case studies.

"The Urban Living Index has been a key tool for us engaging stakeholders. The insights have generated ongoing discussion in the industry. The McCrindle team are knowledgeable, insightful, and quick to turn ideas into strategic deliverables."

— Urban Taskforce Australia



"The research assisted us to accurately advise independent schools on population growth in NSW to enable them to plan for growth. The data has also been used to shape dialogue with the NSW Government regarding the need for additional capital funding required for educational infrastructure in the future."

— Association of Independent Schools NSW

Who we are.

We're specialists in human behaviour.

As leaders in social and market research, we create a clearer picture of the trends that inform strategic thinking.

Organisations come to us to gain greater knowledge and insights into what we call the '3Ps' – People, Products, and Places.

Demographic solutions for:

- ✓ Education providers seeking to understand population growth by location
- ✓ Consumer brands exploring market segmentation by developing a customised index
- ✓ Aged care providers analysing areas by age, income and cultural background
- ✓ Developers seeking to understand the demographic composition of greenfield locations
- ✓ Marketing teams aiming to clarify target market through segmentation studies and census data
- ✓ Board members futureproofing their organisations through future forecasting
- ✓ Strategic planners allocating resources based on business cases and demographic insights

Some of our clients.



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Sydney, Australia

McCrindle Research is an independent social and market research advisory consultancy. We are regularly commissioned to undertake demographic and market research for Australia's leading brands and organisations.

Disclaimer

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