Future Thinking: Demographic change in Break O'Day

A REPORT FOR THE BREAK O'DAY COUNCIL, TASMANIA

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Executive Summary[1]

Over the next 30 year to 2053, the Break O'Day Local Government Area (LGA) is projected to grow by 10.2% to 7,795 people from 7,075 in 2023, a gain of 720 people, at an average annual growth rate of 0.34%.[2] Despite the low growth rate and small increase in the size of the population over a relatively long time frame, the population age structure of the Break O'Day LGA is projected to change noticeably.

This report provides a detailed analysis of the projected population change for Break O'Day and the drivers of that change based on past and current demographic patterns. The intention of these insights is to assist inform the processes of strategic policy and planning development for the changing needs of the Break O'Day population in response to the projections, including managing, and shaping, future change.

As is evident from previous population projections for Break O'Day, predicted population trajectories can change. While previous population projections predicted that Break O'Day would enter into population decline over the short to medium term, the most recent projections by the Tasmanian Department of Treasury and Finance, reverse that prediction.

Even so, this growth is projected to be in older age groups. Numerically, the number of people aged 65 to 84 years of age is projected to continue to increase gradually, while the number of people aged 85 years or older is expected to increase by almost 200% over 15 years from 183 people in 2023 to 539 people in 2038. By 2053, the number of people aged 85 or older is projected to increase by over 330% to be 786 people – to represent 10.1% of the whole Break O'Day population.

The projected population age structure for the Break O'Day LGA in 2053 resembles a tornado. Without proactive intervention, the projected population age structure for Break O'Day - whereby 43.4% of the population is expected to be aged 65 years or older with a median age of 61.1 years - is unlikely eventuate given the population would be unable to support itself.

If the Break O'Day area is not able to attract and retain services and a supporting workforce to meet the needs of a rapidly growing old-old[3] population, it is likely that the number of old-old people leaving Break O'Day will increase over time, as will other age cohorts unable to access the services they need.

It is for this reason that it is unlikely that the projected population age structure for Break O'Day in 2038 (let alone 2053) will eventuate as the population and industry structure will not be sufficient enough to support an old-old population. The consequence will be that the population declines in the older age groups, at least. A decline in demand for secure employment in areas like childcare and education resulting from a smaller child and youth population may influence further migration losses.

However, if Break O'Day is able to maintain, and deliver upon, its lifestyle reputation, the movement of young-old movers into the area will likely continue as the large baby boomer cohort and their children reach retirement age, potentially offsetting any population losses associated with churn from outward movements of young leavers and old-old people.

[1] This report should be read in conjunction with previous reports for the Break O'Day Council; 2021 Census data analysis for Break O'Day and Population change since 2016.
[2] Tasmanian Department of Treasury and Finance (2024), Tasmanian population projections, Break O'Day, medium series.
[3] Old-old population refers to the population aged 85 and older

There are, however, considerable opportunities for Break O'Day to leverage in relation to its ageing population and its relatively attractive lifestyle attributes which will also contribute to creating more secure employment opportunities for the working age population and their families.

These include:

1. Embracing the silver and white economy
2. Improving the quality of schooling, education and training provision
3. Encouraging investment in housing diversification
4. Revitalising and repurposing the built environment

This report begins with an explanation of the purpose of population projections and how to use them effectively for strategic planning purposes. It then provides an analysis and overview of the projected population scenario for Break O'Day over a 15- and 30-year period to 2038 and 2053 respectively. The report then details the drivers of population change for Break O'Day and provides a profile of migrants – those that leave Break O'Day and those that move to Break O'Day and how they compare by age, place of destination and arrival from, their health status, educational attainment and participation in employment. The report then provides an analysis of Break O'Day's dwellings by residency, household composition and tenure, followed by an assessment of housing suitability by household composition and tenure. The report concludes with a discussion and thoughts about potential levers for change for the Break O'Day local government area.

In summary, the Break O'Day population is at risk of a self-reinforcing, perpetual decline trajectory without intervention. To alter the projected population change trajectory for Break O'Day, effort should be directed at strategic policy responses to capture the opportunities associated with an ageing and old-old population and to directly influence the age profile of internal migration movements. However, given the extensive skill and labour shortages throughout Tasmania due the ageing workforce, attracting workers to Break O'Day will be competitive and the area will need to leverage its comparative advantages, or invest further in its lifestyle attributes and amenities to attract (and retain) workers and their families in the area.

Introduction

While this report is founded in analysis of demographic change for the Break O'Day Local Government Area and its projected population change for the next 15 and 30 years, it is important to note that population projections are not forecasts. In their most traditional form, population projections make assumptions about recent patterns for the components of population change – birth rates, life expectancy and migration (intrastate, interstate and overseas) by age and sex - and whether or not these patterns will continue or change – and, if they are assumed to change, by how much - over the projection period.

Essentially, population projections are a prediction of what is likely to happen over the forward period if not much changes, compared with relatively recent pattern of population change. However, population projections come with inevitable uncertainty and are highly dependent on the assumptions made and are therefore not 'fait accompli'.

The challenge in producing population projections for this forward period is that the patterns of population change over the recent period from which Treasury made its assumptions (since the 2016 ABS Census of Population and Housing) has been impacted by the COVID-19 global pandemic. This results in three periods of different patterns of population change in the recent history – one of

the highest growth rates this century driven by migration between 2016 and 2020, another during the period of border controls and lockdowns which disrupted data collection and plausibility (2020 to 2021), and the post-pandemic period since 2022 which has resulted in a significant slowing of Tasmania's rate of population growth to its lowest levels since 1998 – driven by outward interstate migration. Importantly, the experience within the state at regional and LGA level differ considerably. This situation means that making assumptions about future population change in Tasmania and its LGAs is challenging.

For this reason, the Tasmanian Department of Treasury and Finance has been appropriately considered in developing their population projections for the State and its LGAs from 2023 to 2053, stating that "The medium series [of the population projections] reflects the continued evolution of past and present trends in fertility, mortality and migration, with judgement applied as to how these trends will develop in the long term. The high and low series represent the outcome of the upper (high series) and lower (low series) boundaries of assumptions that are still considered plausible"[4].

The Tasmanian Treasury made the following assumptions for the medium series of its population projections for Tasmania as a state:

Table 1 Assumptions, Population Components, Tasmania

Assumption	**2022-23 estimate**	**Medium Series**	**Judgment applied**
Mortality (Life expectancy at birth)	80.0 years (males)* 83.5 years (females)*	Increases from current levels to reach 85.9 years for males and 88.6 years for females by 2053.	Consideration of the possible impact of COVID-19 on mortality and the extent to which life expectancy will continue to improve
Fertility+ (Total Fertility Rate (TFR)) 1.52	1.52	Increases to 1.62 by 2032, then remains constant.	Fertility assumptions have predominantly been based on analysis of past Tasmanian TFR observations, with as adjustment made to account for a predicted decline in temporary visa holders who have a lower TFR compared with Australian-born women, thus increasing the overall TFR.
Net Overseas Migration (per year)	+4 408 persons (net inflow)	Decreases from current level to +2 300 from 2026-27, then remains constant.	Changes in the Australian Government's migration program are expected to reduce the volume of migrants to Tasmania. Treasury allows for an extended phase-in period to the long run, to allow for the assumed greater outflow of temporary migrants from Tasmania, both students and workers with temporary visas, over the first three projection years.
Net Interstate Migration (per year)	-2 597 persons (net outflow)	Increases from current level to +800 from 2026-27, then remains constant.	NIM is the most uncertain demographic component of change due to its responsiveness to economic and social conditions. Treasury prepared the medium State NIM assumption on the basis of the historical NIM data published by the ABS and analysis of the unattributed residual undercount.

Assumptions for Local Government Area population projections were devised similarly to the State assumptions, with some modifications to ensure that the LGA projections were "constrained to, and

[4] TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053 Final Report and Results May 2024

fully consistent with, the State totals"[5]. Prior to the constraint modification process, LGA projections were calculated based on historic patterns for the components of population change for each LGA, so that natural change (the difference between births and deaths) was inputted first, and then migration was dynamically adjusted until LGA population totals reconciled with the State projections and the age and sex profiles[6].

Additionally, despite Treasury's reasonable application of judgement in making assumptions for Tasmania's components of population change, traditional projections do not incorporate assumptions relating to future, unknown issues such as policy changes, marketing efforts or land supply use which may directly, or indirectly, influence future population change.

In the past, the valid, acceptable life of a population projection series has been considered to be a generation (around 20 years). This is because the variables influencing demographic change were predominantly birth rates and life expectancy. Migration played a much smaller role in demographic change until the 2000s. Nowadays, migration is the dominant component of population change, however the composition of migration has many variables; inward and outward movements within and between states and territories as well as overseas. For this reason, the valid, acceptable life should be reduced to 15 years, maximum. As such, this report will provide analysis for a 15-year projection period as well as for the full, 30-year projection period.

Further, Tasmania's economic and social conditions have changed considerably over the past eight years. As internal migration is the most volatile and responsive component of population change for the state any changes in relative economic and social conditions will likely continue to impact the rate of population growth for Tasmania with flow on effects for the local government areas.

Projected population change for Break O'Day LGA

Unless otherwise indicated, all references to population projections in this report refer to the medium series for Break O'Day of the Tasmanian Department of Treasury and Finance 2024 Population projections[7].

Population projections for Break O'Day have been calculated based on historic patterns for the components of population change for the area for fertility, mortality, internal migration and overseas migration.

Population size and change rates

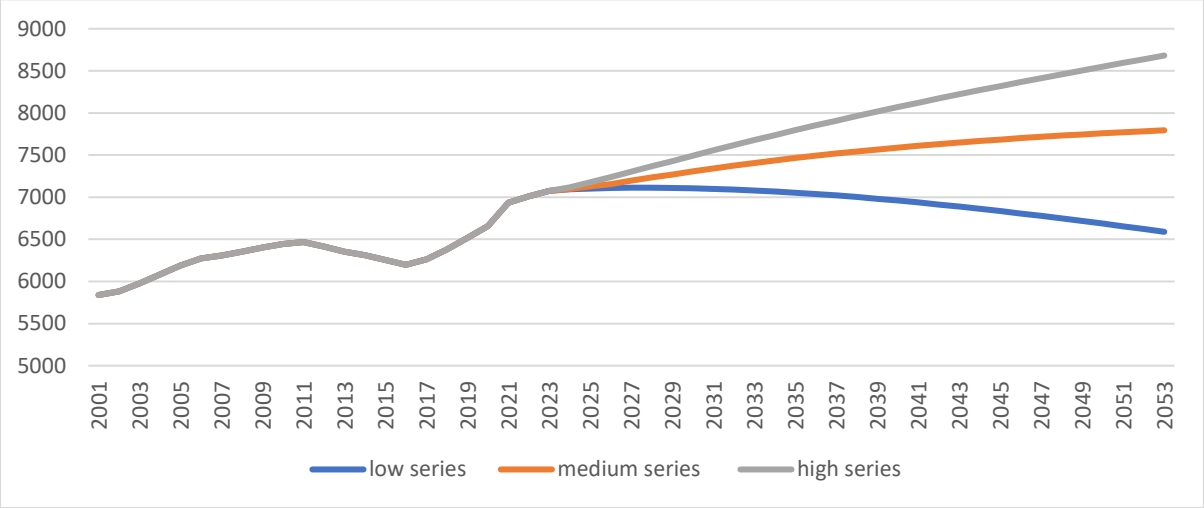
Over the next 30 year to 2053, the Break O'Day Local Government Area (LGA) is projected to grow by 10.2% to 7,795 people from 7,075 in 2023, a gain of 720 people, at an average annual growth rate of 0.34%. This projected growth is a reversal of decline which occurred between 2011 and 2016 and previous population projections.

Under the 15-year projection period, Break O'Day is expected to grow to a population of 7,543 people by 2038, at an average annual growth rate of 0.44%.

[5] Ibid. Page 23.
[6] For a full explanation refer to TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053 Final Report and Results May 2024
[7] TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053

Under the high series, the Break O'Day population is projected to increase by 22.7% to 8,682 by 2053, while the low series projects that the LGA will enter decline from 2029. By 2053 the population is projected to decline 6.8% to 6,590.

Figure 1 Population size, actual and projected, 2023 to 2053, Break O'Day



Source: TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053

Projected components of population change

Population change comprises natural change (the difference between births and deaths), net internal migration and net overseas migration.

While the Total Fertility Rate (TFR) for Break O'Day is assumed to be relatively high compared with the Tasmanian TFR, the small and contracting size of the reproductive age cohort (females aged 15 to 49 years) means that the number of children being born each year in Break O'Day is projected to decline slightly from 227 for the five years to 2028 to 209 births for the five years ending 2053. On the other hand, the number of deaths each year in Break O'Day is projected to increase considerably from 475 for the five years to 2028, to 707 for the five years ending 2053. As a result, natural decline in Break O'Day is projected to increase from 248 in the five years to 2028 to 498 for the five years to 2053.

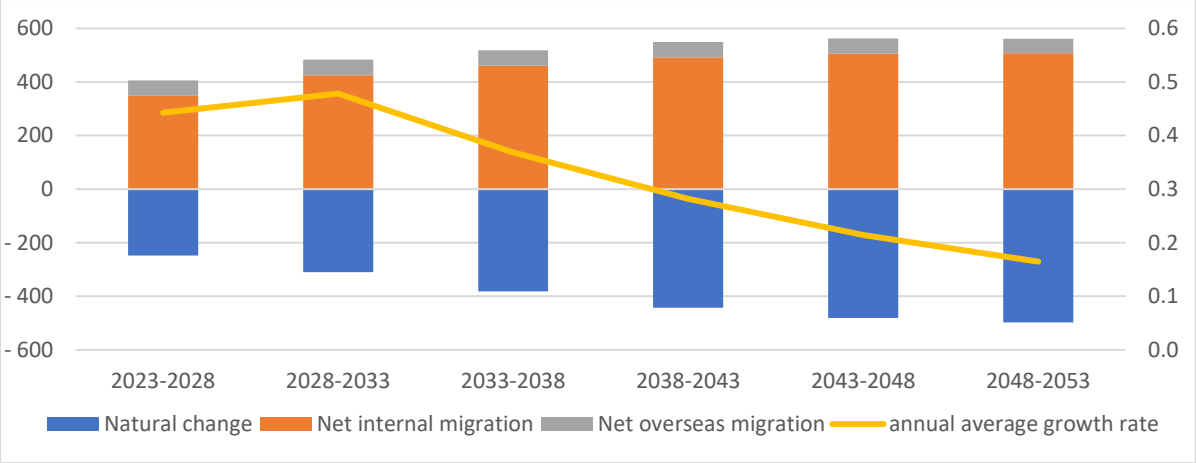
This decline is projected to be offset by increases in migration, mainly internal migration but also from overseas.

Net internal migration – the difference between arrivals to Break O'Day from other areas in Tasmania or interstate – is projected to increase for the 30-year period. While both arrivals and departures are projected to increase, arrivals are expected to offset the departures by 348 people for the five years to 2028, increasing to 507 for the five years ending 2053.

Net overseas migration is projected to remain stable between 59 and 54 persons for each five-year period over the projection series.

Due to the increase in natural decline, the overall growth rate is projected to slow considerably over the projection period.

Figure 2 Projected components of population change, Break O'Day



Source: TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053

Projected population age structure

Despite the low growth rate and small increase in the size of the population over a relatively long-time frame, the population age structure of the Break O'Day LGA is projected to change noticeably.

Structural ageing refers to the proportion of the population getting older and provides insight into the fiscal implications of ageing – the proportion of taxpayers to the proportion of the population requiring financial support and publicly funded services. Structural ageing is caused by declining fertility rates and the age and sex profile of migrants moving in and out of a region.

Numerical ageing refers to the number of people getting older and provides an insight into the potential demand for age-related services. Numerical ageing is caused by increases in life expectancy combined with the large cohort of babies born between 1945 and 1965 (the Post World War II Baby Boom) reaching older ages.

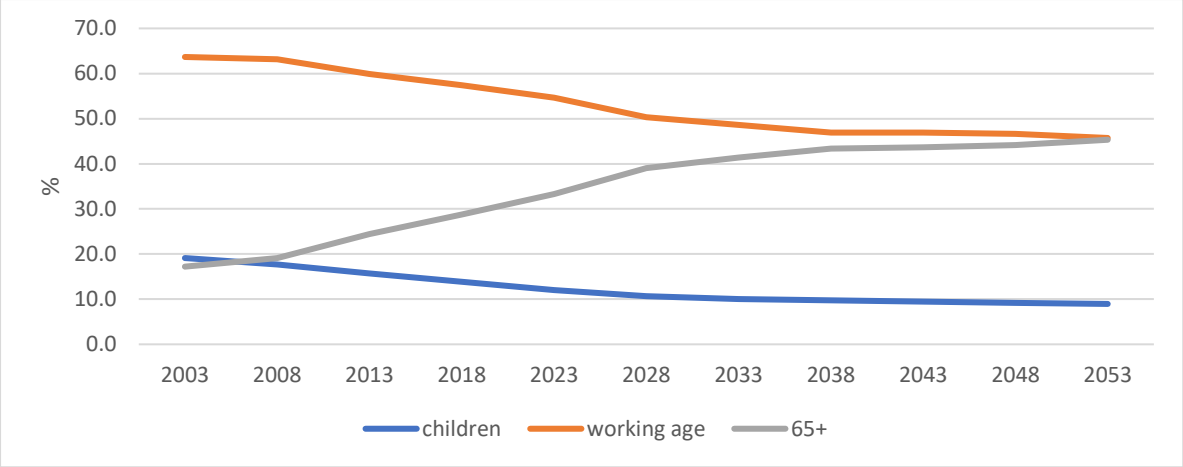
In Break O'Day, within 15 years, 43.4% of the population is expected to be aged 65 years or older with a median age of 61.1 years. By 2053, the median age will be 62.6 years and 45.3% of the population will be aged 65 or older compared with 33.3% in 2023 and 17.2% in 2003.

The proportion of the population of working age (15 to 64 years of age) is projected to decline from 54.7% in 2023 to 46.9% by 2038 and decline further to 45.7% by 2053, compared with 63.7% in 2003.

The proportion of the population aged 0 to 14 years (children), the future generations of workers and taxpayers, is projected to decline from 12.0% in 2023 to 9.7% in 2038 and further to less than one in ten (9.0%) by 2053.

This can be visualised in the below Behaviour over Time (BoT), Figure 3. While the most dramatic change has occurred since 2003, the trajectory is projected to start to slow from 2028 and become a sustained reality for Break O'Day.

Figure 3 Population change by select cohort, actual and projected (%), Break O'Day

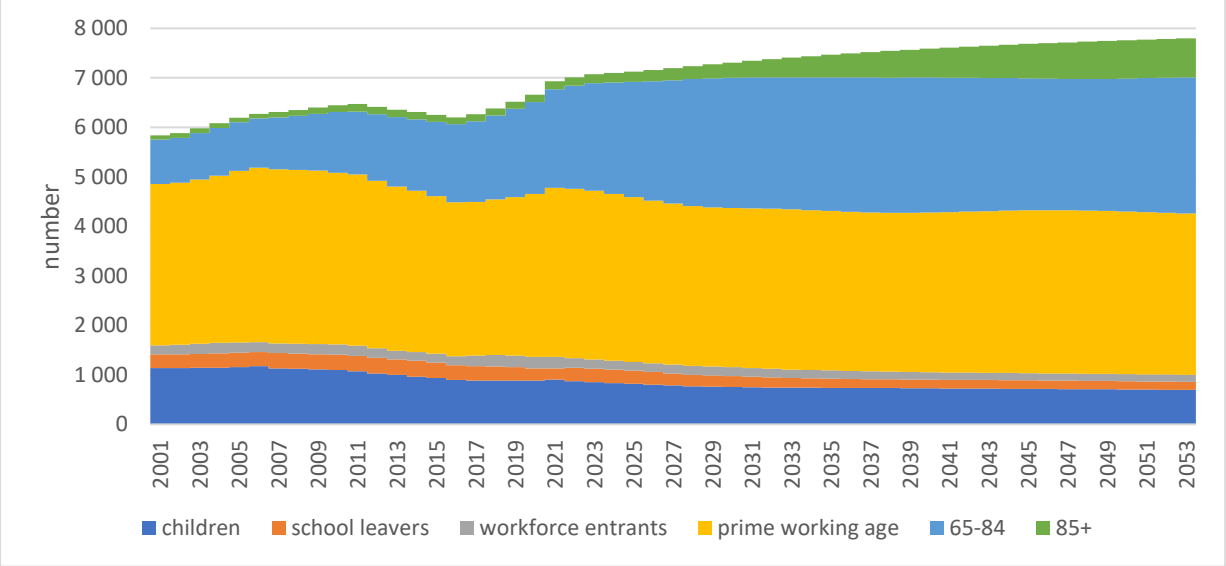


Source: TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053

Numerically, the number of people aged 65 to 84 years of age is projected to continue to increase gradually, while the number of people aged 85 years or older is expected to increase by almost 200% in 15 years from 183 people in 2023 to 539 people in 2038. By 2053, the number of people aged 85 or older is projected to increase by over 330% to be 786 people - 10.1% of the whole Break O'Day population.

The number of Break O'Day residents of prime working age (25 to 64 years) is projected to continue to decline, as is the number of children (0 to 14 years), school leavers (15 to 19 years) and workforce entrants (20 to 24 years). See the figure below.

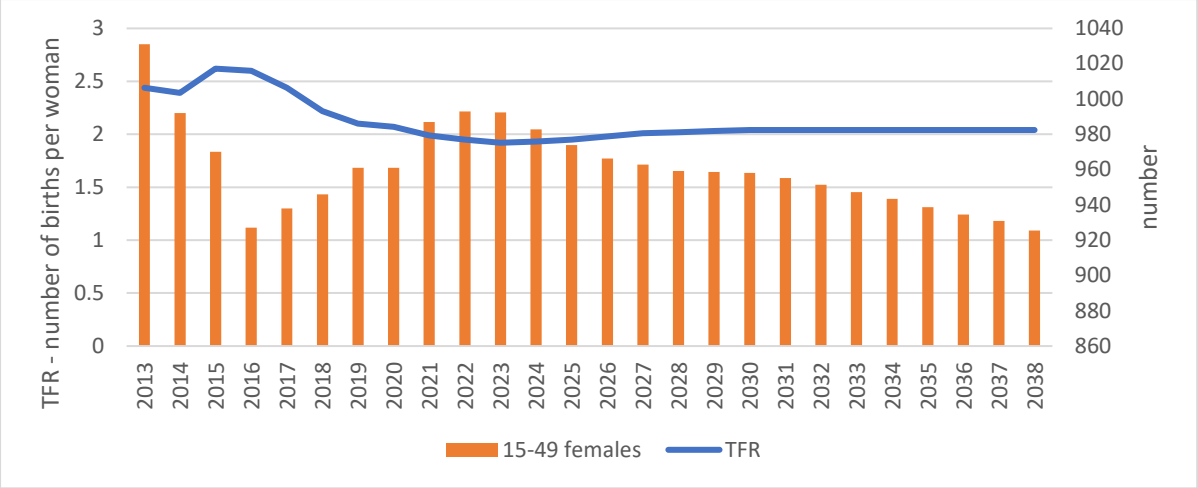
Figure 4 Population by select cohort, actual and projected (number), Break O'Day



Source: TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053

The number of women of reproductive age (those aged 15 to 49 years) is also projected to decline. As a result, despite a relatively higher Total Fertility Rate (TFR), the number of children being born in Break O'Day will also decline over time, contributing to the structural ageing of the population.

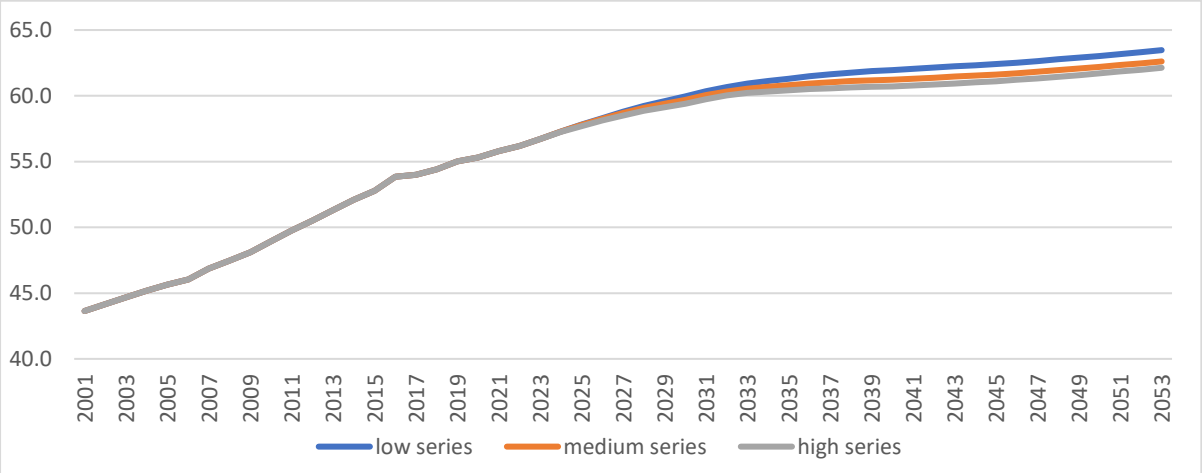
Figure 5 Reproductive cohort (No.) and Total Fertility Rate (TFR), actual and projected, Break O'Day



Source: TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053

This shift to a much older population is also evident from the change in the median age over time. The median age is the age at which half the population is younger and half the population is older. In 2001, the median age was 43.6 years, by 2023 it was 56.7 years. The median age is projected to continue to slowly increase to 61.1 years over the next 15 years to 2038 and then be 62.5 years by 2053 (Figure 6).

Figure 6 Median age, projected and actual, Break O'Day

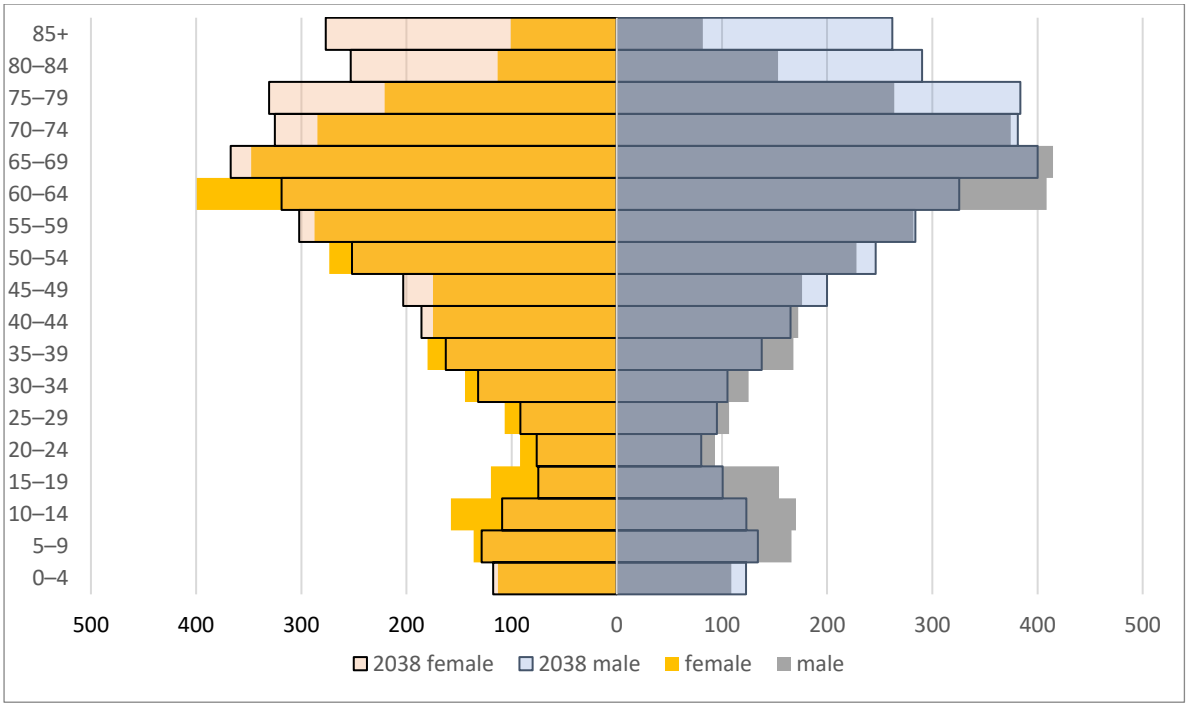


Source: TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053

This ageing of the Break O'Day population is evident in its age structure.

Figure 7 illustrates the change in population age structure between 2023 and 2038 (the outlined bars) for men and women. While there are less people in 2038 than in 2023 for nearly all five-year age groups under 39 years of age, there are increasingly more people for each five-year age group older than 65 years of age.

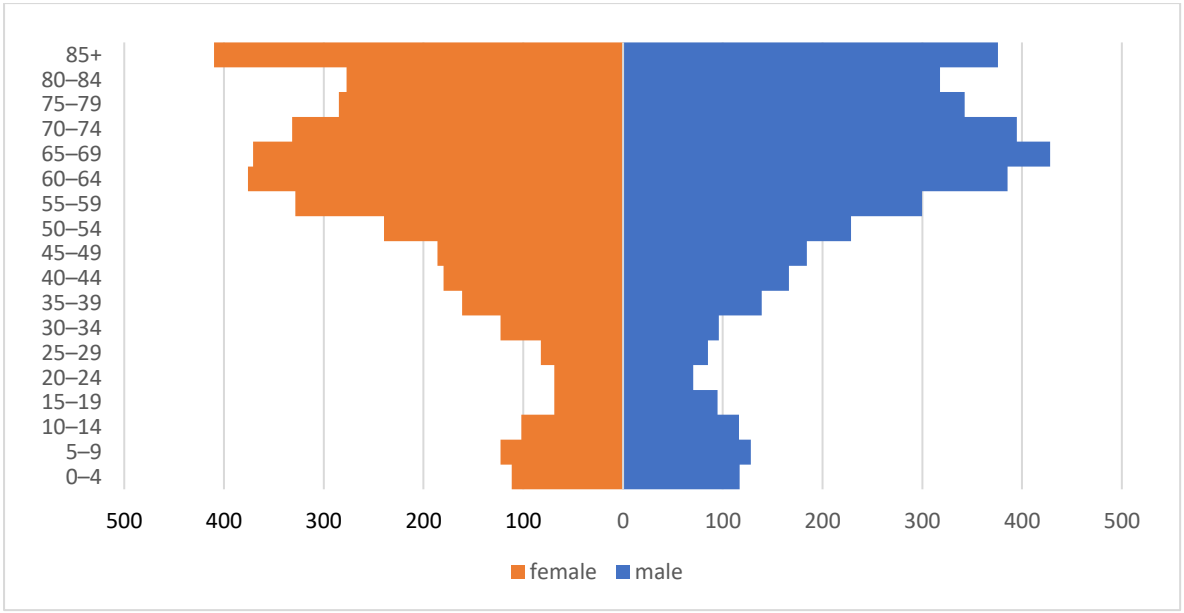
Figure 7 Projected population age structure, 2038, Break O'Day



Source: TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053

By 2053, the projected population age structure for the Break O'Day LGA resembles a tornado. See Figure 8. However, it is unlikely that this projected age structure will eventuate, predominantly because the population will not be able to support itself. This is explained in more detail in the Discussion section of this report.

Figure 8 Projected population age structure, 2053, Break O'Day



Source: TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053

Uncertainty

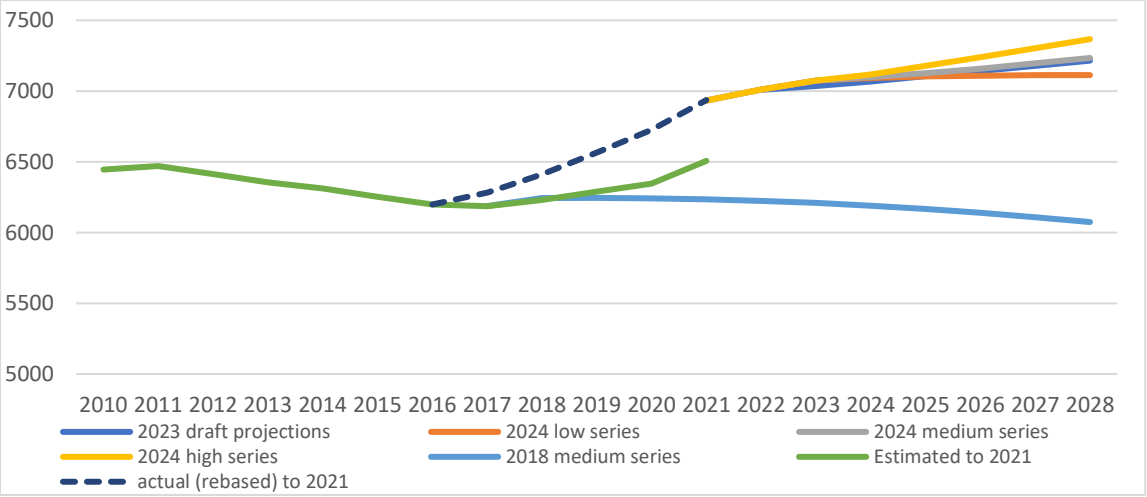
There has been much consternation in recent years that the previous population projections for Tasmania were not accurate and therefore impacted effective planning for the eventual population change that did occur.

As explained previously in the Introduction section, the process of producing population projections does not incorporate assumptions about the impact of future policy changes or developments on population change. In the period since the last projections were released in 2018, there have been several policy changes and developments as well as external shocks and relativities which have directly, and indirectly, influenced population change in Tasmania, and thus Break O'Day. These include, but are not limited to:

- The Tasmanian Population Growth Strategy and associated marketing efforts
- International education being prioritised as a "super-growth" sector for the export of services at a national and state level
- Increased use of overseas migration to fill skill and labour shortages – temporary, seasonal and permanent
- Change in temporary migrant visa system and pathways to permanency
- Relativities in employment, education and training, housing and lifestyle
- The COVID-19 global pandemic

Indeed, for the Break O'Day LGA, actual population change exceeded the 2018 projections made by the Tasmania Treasury for the previous period by substantial margin between 2016 and 2021 (dotted line in Figure 9), as well as the ABS's annual Estimated Resident Population (ERP) (green line).[8] Since 2020, Tasmania's population growth trajectory has slowed, as has Break O'Day's. Given that Break O'Day's population had been in decline since 2011, it was reasonable to expect that the 2018 Tasmanian Treasury population projections would predict further decline on the basis that traditional population projections are informed by assumptions relating to recent historical patterns for each of the components of population change.

Figure 9 Population (No.), estimated, actual and projected by series, Break O'Day



Source: TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053

[8] Refer to Appendix in TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053

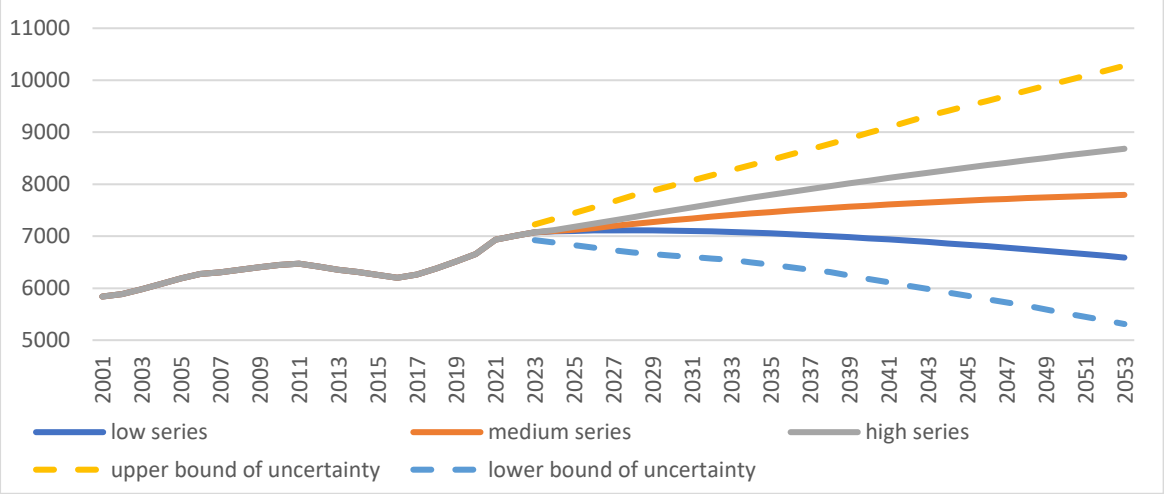
Regardless, given that population estimates are released by the ABS at least quarterly at a state level and annually at an LGA level, population change can be effectively monitored and tracked to projections on an on-going basis enabling users and decision-makers to respond accordingly.

Given the recent slowing of Tasmania's and Break O'Day's population growth rates, it is reasonable that the Tasmanian Treasury projects that Break O'Day's population growth will continue, albeit more slowly than between 2016 and 2020 given the change in migration patterns and the ageing of the population.

However, known policies that are likely to affect population change into the future at a State level include the first iteration of the Australian Government's Migration Strategy and a cap on international student enrolments. How these policies may impact Break O'Day will need to be considered and monitored. Additionally, the Tasmanian Government has not yet released its updated/refreshed Population Growth Strategy which will have a flow on effect on Break O'Day. The recently announced East Coast Regional Partnership Agreement with the State Government also has the potential to directly, and indirectly, influence population change for Break O'Day and the wider region.

To accommodate uncertainty, Treasury introduced uncertainty ranges for each local government areas for the medium series. For Break O'Day, the uncertainty range covers approximately 80% of possible futures and is estimated from past forecast errors[9]. As a result, the upper and lower ranges of uncertainty for Break O'Day exceed the high and low series.

Figure 10 Projected population, by series and bounds of uncertainty, Break O'Day



Source: TasPOPP 2024 Tasmanian and Local Government Area Population Projections – 2023 to 2053

[9] Tasmanian Department of Treasury and Finance, TasPOPP, Population projections summary for Break O'Day (medium series)

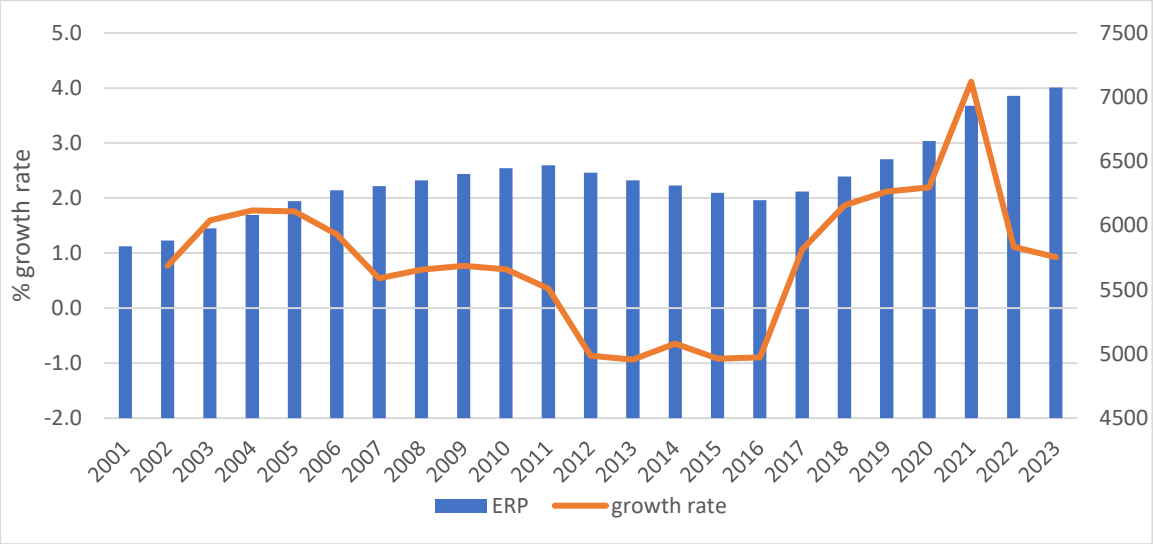
Drivers of population change

Given that population projections are informed by assumptions made in relation to the components of population change – birth rates, life expectancy and migration – which are underpinned by their respective recent historic patterns and their interaction -, this section of the report discusses the drivers of population change for Break O'Day in the period since 2016, with reference to the preceding years.

As is evident from Figure 11 below – a Behaviour over Time chart -, Break O'Day's population growth rate has fluctuated considerably over the past two decades including periods of slow growth, decline between 2011 and 2015 and almost exponential growth between 2016 and 2020. The global pandemic year ending June 2021 resulted in a growth rate equivalent to 4.1 per cent for the year which is attributable to close to zero outward migration from the area – there was nowhere to move to given the restrictions associated with the pandemic including border controls, working and studying from home and employment contraction.

Since the opening of the borders at the end of 2021, population growth has slowed considerably when compared with the four years prior to 2020.

Figure 11 Estimated Resident Population (ERP) and growth rate, Break O'Day

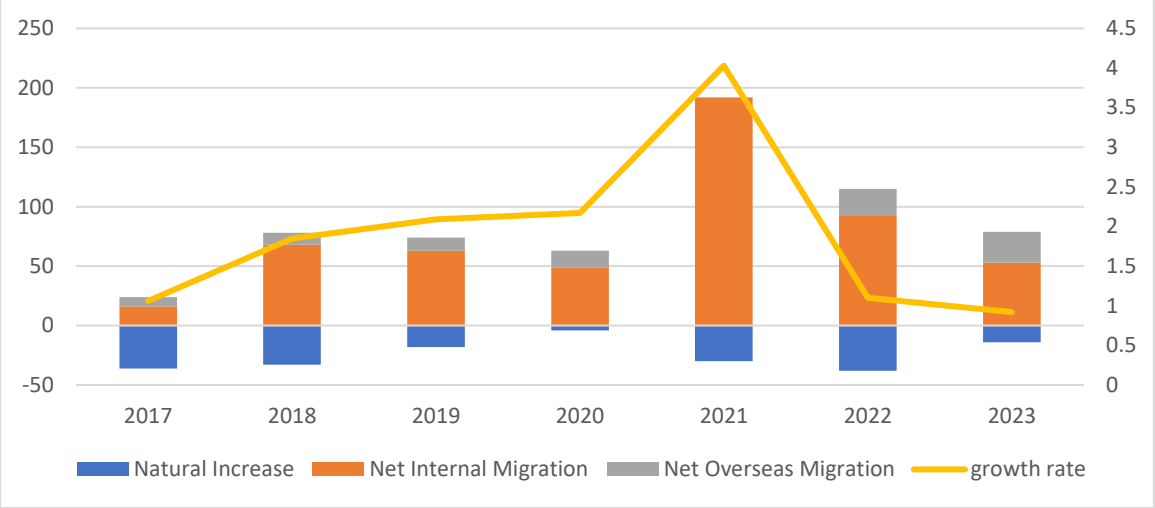


Source: ABS, Regional Population

Components of population change

Despite Break O'Day's ageing population, persistent natural decline (more deaths than births) has historically been offset by migration, predominantly internal migration, to maintain a growth trajectory since 2016-17. Net internal migration has historically been the largest contributor to population growth in Break O'Day as an attractive place for lifestyle and retirement purposes.

Figure 12 Components of population change and growth rate, Break O'Day



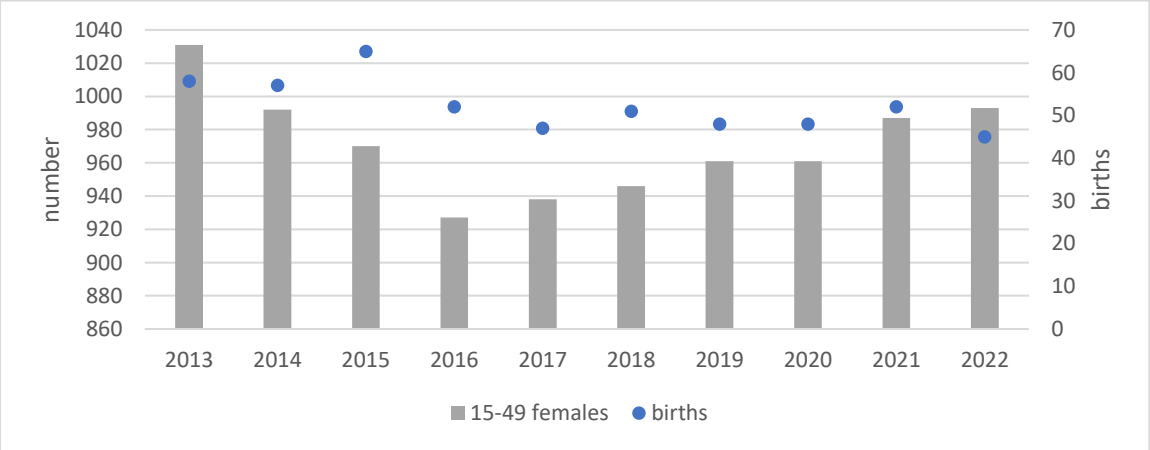
Source: ABS, Regional Population

Fertility

The Total Fertility Rate (TFR) for an area provides an indication of the number of children a woman aged 15 to 49 years of age is likely to have in her lifetime. However, to estimate the number of children expected to be born in an area, the TFR is applied to the number of women aged 15 to 49 years in the population of that area.

Despite the number of Break O'Day women aged 15 to 49 years declining between 2013 and 2015, the number of children born increased due to an increase in the TFR. Since 2016, while the number of women of reproductive age increased steadily to 2022, the TFR declined over the same period in the Break O'Day area. Even so, this resulted in a relatively stable number of children being born each year, a high of 52 in both 2016 and 2021 and a low of 45 children born in 2022.

Figure 13 Reproductive cohort (No.) and births (No.), Break O'Day



Source: ABS, Births

The decision of whether or not to have children and how many to have is influenced by economic cost and/or opportunity costs, for example, financial cost, economic security, employment flexibility, housing security and issues such as access to child care.

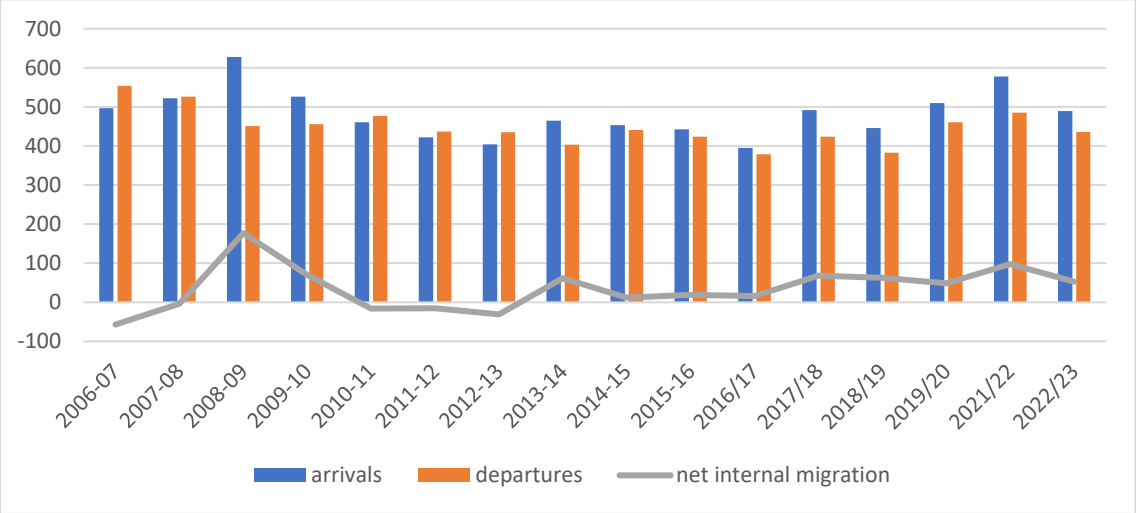
Migration

Migration comprises internal migration – to or from other areas within Tasmania and interstate - and overseas migration. Net migration is the difference between arrivals to Break O'Day and departures from Break O'Day to other areas. Direct overseas migration for Break O'Day has been negligible, however, overseas migrants are likely to have moved to and from Break O'Day from other areas in Australia and should be captured in internal migration movements[10].

Internal migration

Net internal migration has historically been the largest contributor to population growth for Break O'Day. While the net gain is relatively small, the number of arrivals and departures is large, representing between 6.5% (departures) and 7.1% (arrivals) of the total population on average for the five-year period prior to the COVID-19 pandemic. Since then, following a gap in data reporting for 2020-21[11], both internal migration arrivals and departures for Break O'Day increased considerably in 2021/22 compared with the previous five-year average. In 2022/23 internal migration remained higher than the average, but lower than 2021/22 numbers.

Figure 14 Internal migration, arrivals, departures and net, Break O'Day



Source: ABS, Regional Population

Internal migration by age

Internal migration by age data is not available at the Local Government Area level, but at the SA2 level. For analysis of internal migration by age purposes, the St Helens-Scamander SA2 is used as a proxy for the Break O'Day area.

Data is only available for the 2016/17 to 2021/22 years, with 2022/23 data to be released in the Regional Population by Age and Sex publication in August 2023.

As is evident in the below figure, net internal migration to St Helens-Scamander SA2 has been increasing considerably for the 45-to-64-year age group. Much smaller net gains are apparent, but

[10] Note – the ABS identified that internal migration is difficult to capture for overseas migrants on temporary visas given that the are not eligible for Medicare which is the primary data source (change of address details) for internal migration movement estimates.

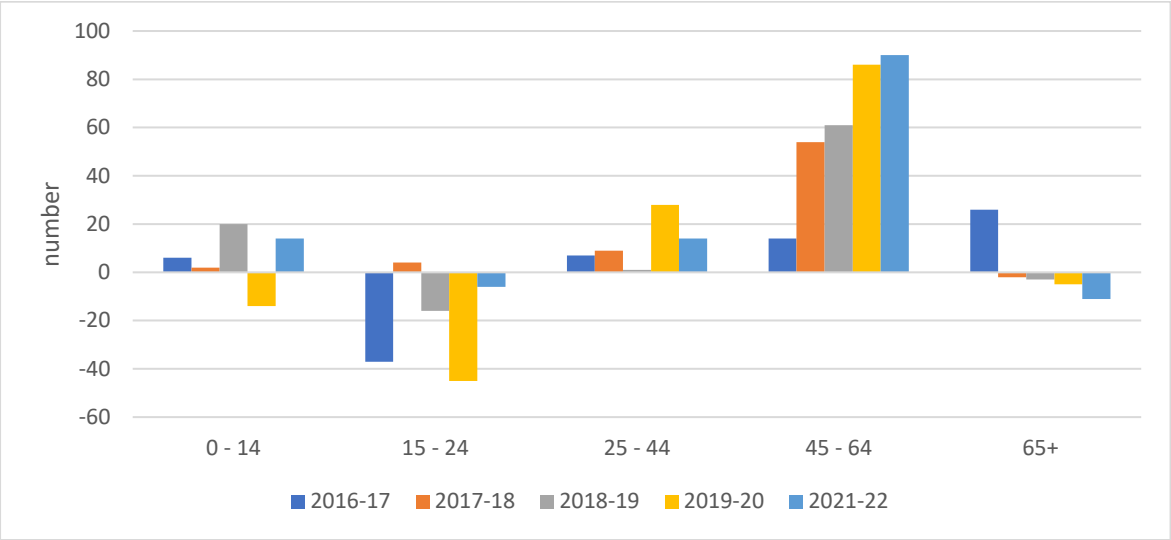
[11] Internal migration data reporting was suspended by the ABS during 2020, 2021 and some of 2022 due to implausibly high numbers of migration movements attributable to changing addresses with Medicare during the mass vaccination roll out associated with the COVID-19 pandemic.

inconsistent, for the 25 to 44 age group and their children aged 0 to 14 years. Net losses were recorded for almost all years for the 15 to 24 age group while net losses have been steadily increasing for those aged 65 or older.

Anecdotal data relating to older people leaving regional areas suggests three main reasons:

1) To return to where they came from
2) To move to be closer to family either to receive care or provide care
3) To be closer to services

Figure 15 Internal migration by age group (No.), St Helens-Scamander SA2



Source: ABS, Regional Internal Migration Estimates

Migrant profile

Analysing the 2021 ABS Census of Population and Housing data using the Usual Place of Residence five years ago variable provides more detailed insights into the profiles of those people who leave Break O'Day to live elsewhere in Australia[12] and those who move to Break O'Day from elsewhere and how these two profiles compare.

While most reporting on population change focusses on growth rates and the size of the population, it is important to understand that this data represents the aggregation of decisions made by individuals, couples or families according to where they are in their life stage and their own personal circumstances. This includes whether or not to have a child, when and how many to have as well as where they live and why. These decisions are influenced by economic circumstances such as financial security, employment and/or education opportunities or housing availability as well as personal circumstances, such as lifestyle preferences, family reunification and the need – and access to - services such as education and/or health care.

More detailed analysis of migration for a regional area can provide greater insights into the reasons why people move to a place, or from a place, based on their age and engagement with work, and/or education as well as their health status.

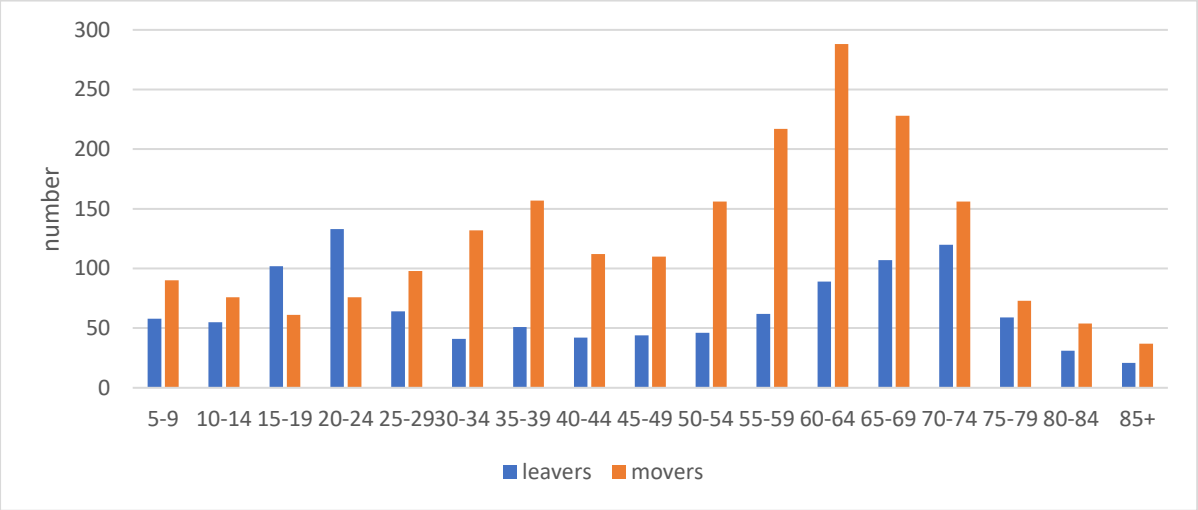
[12] It is not possible to capture data for those people who lived in Break O'Day 5 years prior to the Census and lived overseas at the time of the Census.

According to 2021 ABS Census data around 1,144 people lived in Break O'Day five years prior to the Census but lived elsewhere in Australia at the time of the Census[13], whereas around 2,121 people moved to Break O'Day from elsewhere in Australia or overseas over the same period. A gain of 996 people to the area[14].

Age

Many more people of all five-year age groups - except for those aged 15 to 19 years and 20 to 24 years of age - moved to Break O'Day than left. While the number of people leaving Break O'Day increased for each five-year age group between those aged 50 to 54 years and 70 to 74 years of age, the number of people moving to Break O'Day in those age groups was considerably higher, contributing to accelerating the rate of population ageing for the area.

Figure 16 Leavers and movers (No.), by five-year age group, Break O'Day



Source: ABS, Census of Population and Housing, 2021

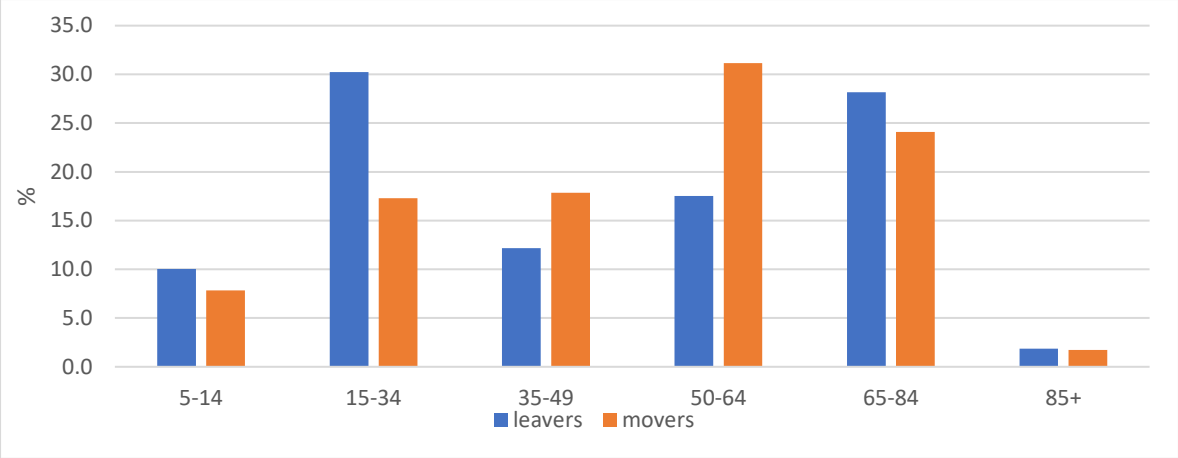
While Break O'Day attracted more families to the area given the numerical increase in 5- to 14-year-olds and 30- to 49-year-olds, proportionately almost a third (31.2%) were aged between 50 and 64 years, while over half (57%) of all movers to Break O'Day were aged over 50 years.

Three in ten (30.2%) leavers were aged between 15 and 34 years while another three in ten were aged over 65 years of age.

[13] August 2021 – noting that almost half of the Australian population (all of NSW and Victoria) were in lockdown at the time of the Census due to the COVID-19 Global Pandemic.

[14] It is almost important to note that the Census will not capture the data of people who lived in Break O'Day and then moved elsewhere but were no longer alive at the time of the Census.

Figure 17 Leavers and movers by age group (%), Break O'Day



Source: ABS, Census of Population and Housing, 2021

This numerical and proportional data supports the increasing anecdotal evidence that old-old people are leaving regional areas but that these areas remain attractive for early and/or active retirement or for lifestyle purposes.

Place of Usual Residence – destination and arrival from

Most of the migration in and out of Break O'Day is within Tasmania.

Almost two thirds (64.7%) of former Break O'Day residents lived in another LGA in Tasmania at the time of the 2021 Census. The top 13 LGA destinations were all in Tasmania with the top five being Launceston (19.7%), Northern Midlands (7.5%), Meander Valley (4.6%), West Tamar (4.1%) and Clarence (3.3%). Non-Tasmanian LGA destinations included Moreton Bay (1.5%), Sunshine Coast (1.4%) and Fraser Coast (1.3%).

Almost half of the arrivals to Break O'Day came from another LGA in Tasmania (46.8%) while 5.8% lived overseas 5 years prior to the 2021 Census. The top Tasmanian LGAs were Launceston (11.5%), Northern Midlands (3.4%) and West Tamar (3.4%). A large number of people also moved to Break O'Day from LGAs in Queensland; Brisbane (3.2%), Gold Coast (2.2%) and Moreton Bay (1.9%).

Health

A considerable number of people both moving to Break O'Day and from Break O'Day have long-term health conditions, with around a fifth of them needing assistance with core activities.

Of those people who moved to Break O'Day, almost half (47.4%) did not have a long-term health condition, while a third (33.0%) disclosed that they have one or more long-term health conditions (19.5% did not state either way). Of those with at least one long-term health condition, 17.9% has a need for assistance with core activities where very few (0.7%) of those without a long-term health condition need assistance with core activities.

Of those who left Break O'Day, around 51.6% did not have a long-term health condition, while 45.3% did. Of those with a long-term health condition, almost one in five (19.2%) need assistance with core activities.

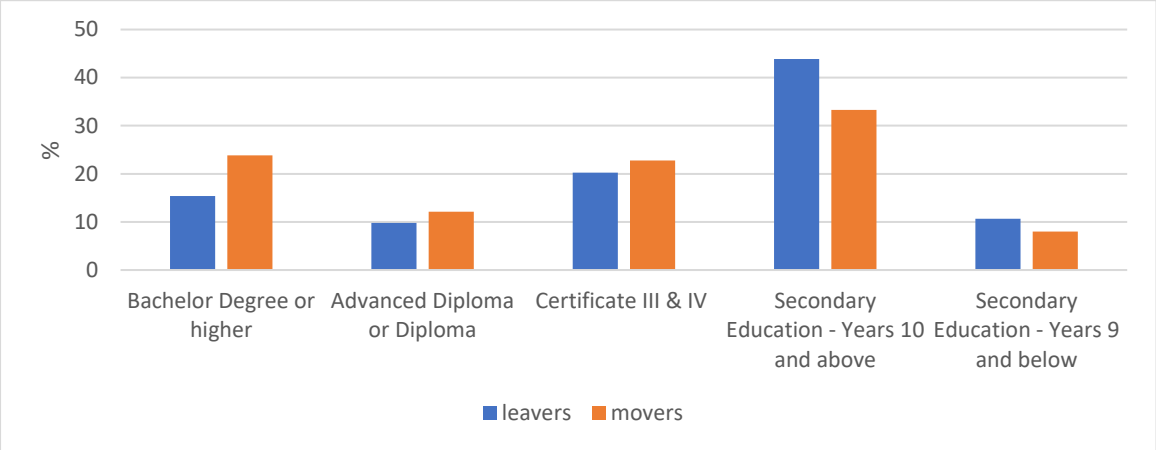
Education

The profile of leavers and movers by their highest level of educational attainment reflects their life stages and underlying reasons for relocating.

For over half (54.5%) of Break O'Day leavers, the highest-level educational attainment is more likely be secondary schooling (43.8% for year 10 and above, and 10.7% for year 9 and below), reflecting the high proportion of school leaver aged outward migrants likely to be seeking secondary schooling or post-school education and/or employment opportunities elsewhere.

While almost a quarter (23.9%) of movers to Break O'Day have a bachelor degree or higher, a third (33.3%), the highest level of educational attainment is year 10 and above secondary schooling, reflecting the much older age profile of people moving to the area who have lower levels of educational attainment nationally. Almost a quarter (22.8%) had completed a vocational education and training qualification (Certificate III or IV).

Figure 18 Leaver and movers, highest level of educational attainment, Break O'Day



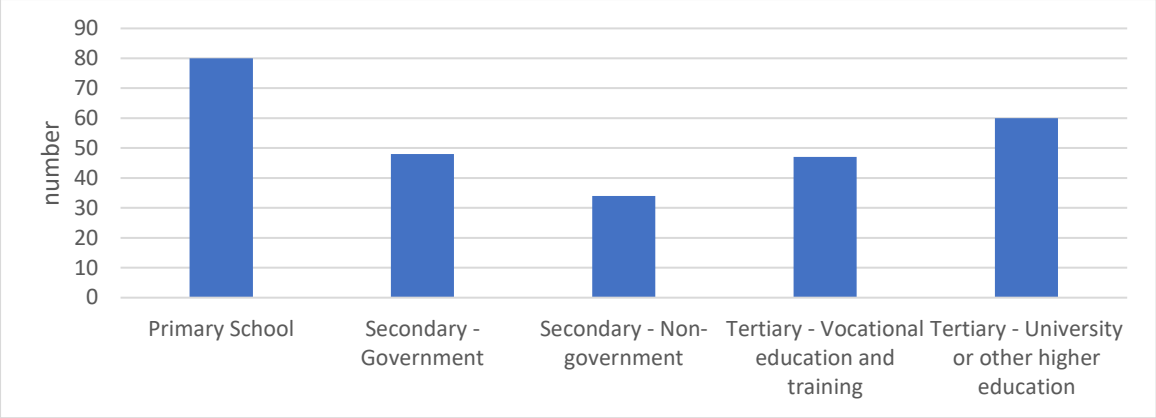
Source: ABS, Census of Population and Housing, 2021

Almost a quarter (23.4%) of Break O'Day leavers were enrolled in an educational institution compared with 10.0% of those who moved to Break O'Day.

Three in ten leavers were attending a primary school, while another three in ten were attending secondary schooling (17.8% at a government school, 12.6% at a non-government school) suggesting that families were leaving for education and employment opportunities. Nearly a quarter (22.3%) were attending university and 17.5% were undertaking vocational education and training in their place of destination.

Despite the provision of schooling in Break O'Day including District High Schools and a commitment to the year 11 and 12 extension program, the 2021 Census data suggests that people leave Break O'Day for the purposes of education, including primary and secondary schooling.

Figure 19 Enrolment in educational institutions, leavers, Break O'Day



Source: ABS, Census of Population and Housing, 2021

Of those movers to Break O'Day enrolled in an educational institution, almost half (48.3%) were attending primary school and 17.6% were attending high school, indicating that families also move to the area. Interestingly, 15.5% were enrolled at university, presumably online. Given that the Census was undertaken during the COVID-19 pandemic and the work/study from home requirement, this is likely to be a once-off situation. A large proportion (13.9%) were also undertaking vocational education and training.

Employment

Of the Break O'Day movers and leavers, more than half of the potential labour market (all those age 15 and older) were not participating in the labour force at the time of the 2021 Census. For those who moved to Break O'Day, 60.1% were not in the labour force, for those who left Break O'Day, 53.9% were not in the labour force. This is not surprising given the older age profiles of both movers and leavers.

For those in the labour force, leavers were more likely to be employed full time (21.7%), while movers to Break O'Day were more likely to be employed part time (17.7%).

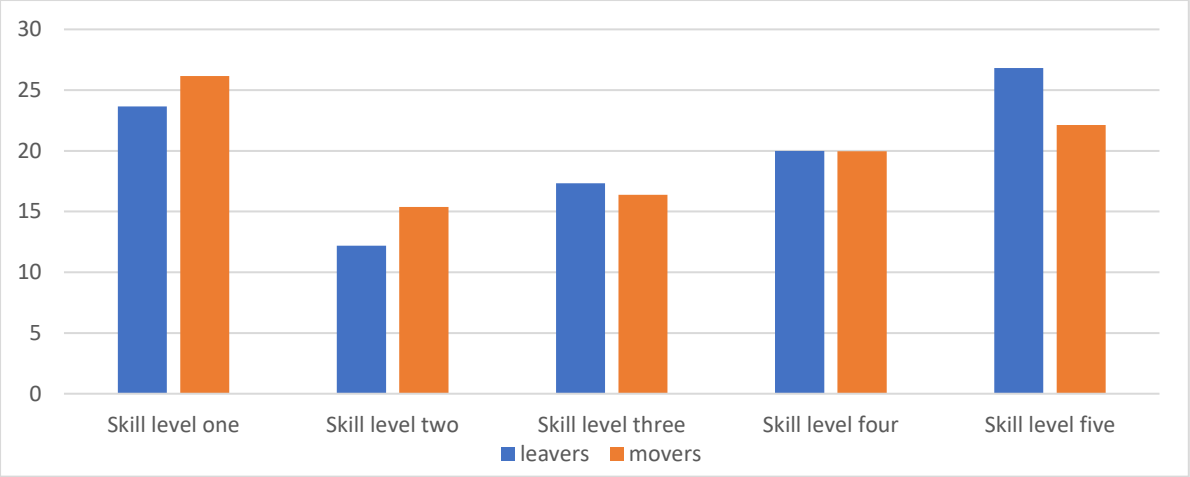
Figure 20 Labour force status, leavers and movers, Break O'Day

Source: ABS, Census of Population and Housing, 2021

When considered by skill level, employed movers to Break O'Day were more likely to be working in Skill Level 1 jobs than leavers (26.1% compared with 23.6%), who were more likely to be employed

in Skill Level 5 jobs (26.8% compared with 22.1%). This profile reflects the respective age and life stages associated with older movers to Break O'Day more likely to have completed higher education qualifications associated with Level 1 skilled jobs than the younger Break O'Day leavers who were likely to be pursuing higher education and/or entry level employment opportunities.

Figure 21 Skill level of job, employed leavers and movers, Break O'Day



Source: ABS, Census of Population and Housing, 2021

The top 10 occupations for leavers and movers were similar, albeit in a different order. Movers to Break O'Day were more likely to be working in tourism related occupations – hospitality, retail and cleaning as well as in health and care sector occupations, reflecting the dominant industries in the area[15]. In addition to retail and hospitality, leavers were also working in health, care, education and construction occupations reflecting the leavers' stage of life and also employment opportunities in their place of destination. This indicates that there is likely to be considerable churn in employment in the Break O'Day area, perhaps suggesting a transient workforce, retention issues, seasonality of work or other issues preventing retention such as access to affordable housing, quality education or relative opportunities.

Table 2 Top 10 Occupations, leavers and movers, Break O'Day

	Leavers	Movers
1	Sales Assistants and Salespersons	Hospitality, Retail and Service Managers
2	Health Professionals	Sales Assistants and Salespersons
3	Carers and Aides	Hospitality Workers
4	Hospitality, Retail and Service Managers	Health Professionals
5	Education Professionals	Specialist Managers
6	Construction Trades Workers	Cleaners and Laundry Workers
7	Specialist Managers	Carers and Aides
8	Cleaners and Laundry Workers	Design, Engineering, Science and Transport Professionals
9	Inquiry Clerks and Receptionists	Education Professionals
10	Business, Human Resource and Marketing Professionals	Food Trades Workers

Source: ABS, Census of Population and Housing, 2021

[15] Refer to previous report for Break O'Day Council the 2021 ABS Census data analysis

Housing

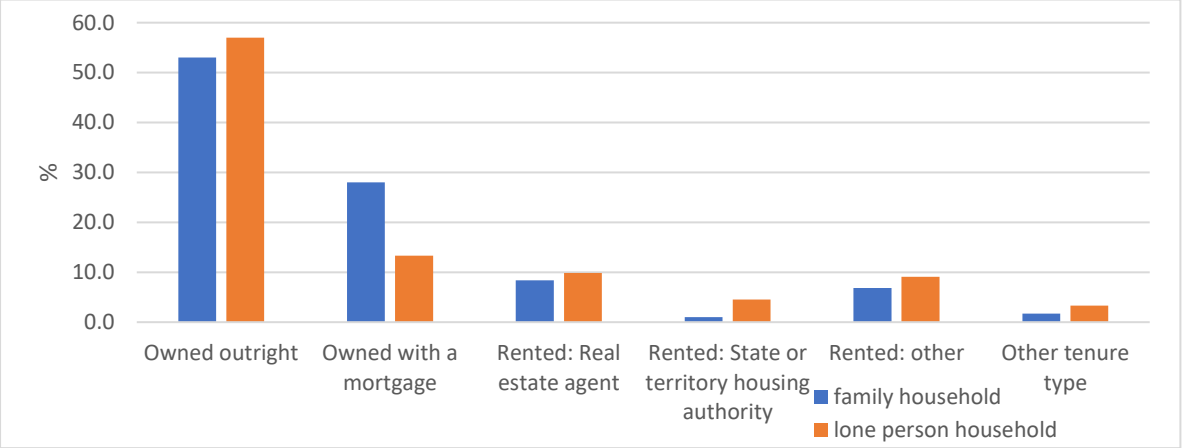
Of the 4,850 dwellings in Break O'Day, almost two thirds (65.0%) were privately occupied at the time of the 2021 ABS Census of Population and Housing – permanent residents. Almost a third (31.3%) were unoccupied suggesting that the dwelling is a not the primary residence of the owner, and 3.3% were occupied by visitors at the time of the Census.

Of the privately occupied dwellings, almost 3 in 5 (58.3%, 1,838 dwellings) were habited by a single family. Over a third (34.1%) of the privately occupied dwellings were lone person households (1,075 people). The remainder were group households (1.9%) or other household types (5.0%).

In terms of tenure type, over half (54.8%) of the privately occupied dwellings were owned outright, while 21.6% were owned with a mortgage. One in five (20.6%) of Break O'Day residents were renting their homes while a small proportion (2.2%) were occupied rent free.

When considered by household type, either families or lone persons, lone persons were more likely to own their home outright (57.0%) than families (53.0%). While families were more likely to be in the process of owing (28.0%) their homes than lone persons (13.3%). Even so, Lone persons were more likely to be renting or have other tenure types than families.

Figure 22 Dwelling by tenure type, Break O'Day



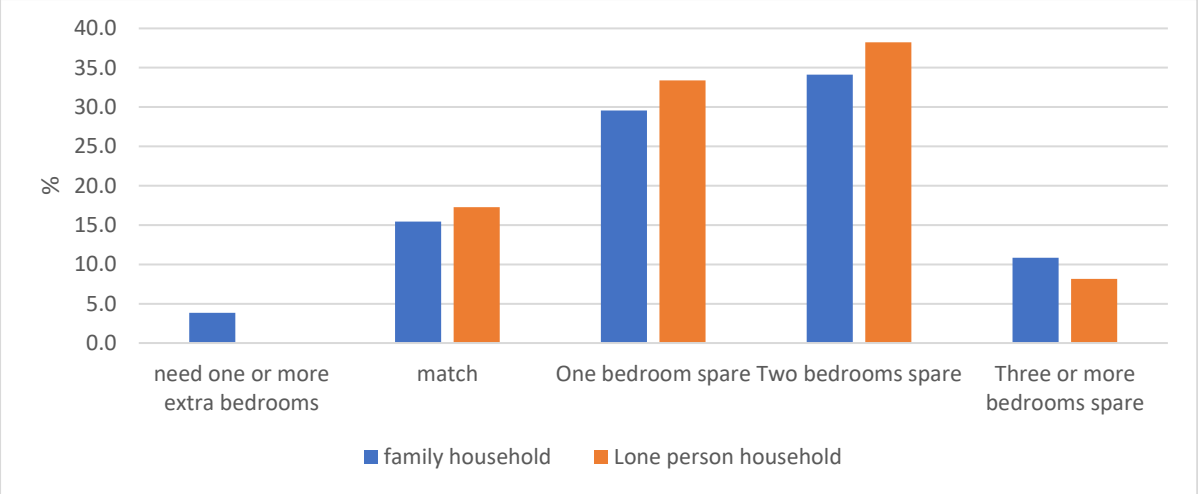
Source: ABS Census of Population and Housing, 2021

Housing suitability

There is a mismatch between housing demand and supply by bedroom numbers in Break O'Day.

For 15.5% (287) of family households and 17.3% (360) lone person households there is a match, that is there are no spare bedrooms or the need for additional bedrooms in their homes. Whereas there is an oversupply of bedrooms for three quarters of family households (74.5%) and four in five lone person households (79.8%). 72 (3.9%) family households need at least one more bedroom in their homes to meet the family's needs.

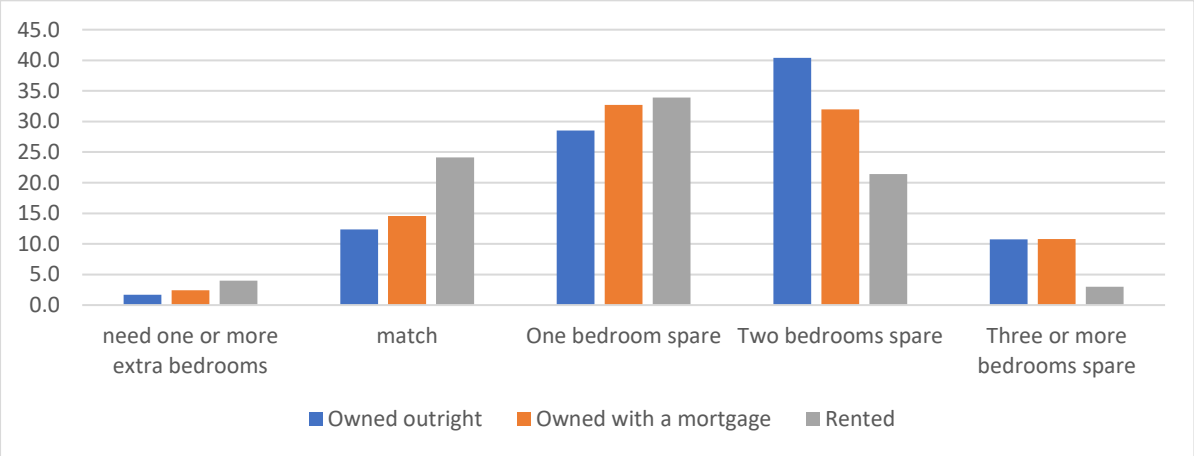
Figure 23 Dwelling suitability by household type, Break O'Day



Source: ABS Census of Population and Housing, 2021

When housing suitability is considered by tenure type; owned outright, owned with a mortgage or renting, the mismatch between demand and supply of housing by bedroom numbers is more evident. While a quarter (24.1%) of rented dwellings matches the needs of renters, the dwellings of homeowners are more likely to have excess bedrooms than required; 79.7% for outright homeowners and 75.5% of owners with a mortgage. A small proportion of dwellings do not meet demand.

Figure 24 Dwelling suitability by tenure type, Break O'Day



Source: ABS Census of Population and Housing, 2021

Discussion

Given that more than three in five (62.9%) Break O'Day permanent residents do not work, and are not looking for work, and that only two in five (43.0%) of those who do work, work full-time, the Tasmanian local government area of Break O'Day could be considered a lifestyle location for most of its residents. Given also that only around two thirds (65.0%) of the private dwellings in Break O'Day are privately occupied by permanent residents, the data also suggests that the Break O'Day LGA is also a second home destination (shack or holiday home) and/or tourist/visitor accommodation for the remaining third (31.3%) of the unoccupied private dwellings in Break O'Day.

The older population age structure and the migrant profile of Break O'Day reflects that the decision to live in a place is influenced by individuals, couples or families according to where they are in their life stage and the context of their own personal circumstances such as the need for financial security, employment and/or education opportunities or housing as well as access to services such as schooling or further education and training and/or health and aged care.

Break O'Day's current population age structure and projected population change further reflects the influence of the age profile of internal migrants – arrivals and departures – on its trajectory.

There are three main internal migrant profiles for the Break O'Day LGA:

1) Younger leavers
2) Old and old-old leavers
3) Young-old movers

Young leavers includes those of secondary schooling age and school leavers pursuing further education and/or training or employment predominantly aged between 15 and 34 years of age.

Old and old-old leavers includes those aged 65 or older, including increasing number and proportion of old-old leavers, those aged 85 or older.

Young-old movers to Break O'Day includes those aged between 50 and 84 years of age who are likely to be lifestyle migrants and/or early, active and relatively healthy retirees.

Under the current population projection scenario, as the population continues to age over time, the demand for age-appropriate lifestyle, health and aged-care services will increase and the demand for schooling and education-related, including child care, services will decline.

Numerically, the number of people aged 65 to 84 years of age is projected to continue to increase gradually, while the number of people aged 85 years or older is expected to increase by almost 200% in 15 years from 183 people in 2023 to 539 people in 2038. By 2053, the number of people aged 85 or older is projected to increase by over 330% to be 786 people - 10.1% of the whole Break O'Day population.

If the Break O'Day area is not able to attract and retain services and a supporting workforce to meet the needs of a rapidly growing old-old population, it is likely that the number of old-old people leaving Break O'Day will increase over time.

It is for this reason, that it is unlikely that the projected population age structure for Break O'Day in 2038 (let alone 2053) will eventuate as the population and industry structure will not be sufficient to support an old-old population. The consequence will be that the population declines in the older age groups, at least. A lack of secure employment opportunities in areas like childcare and education may influence further migration losses.

However, if Break O'Day is able to maintain, and deliver upon, its lifestyle reputation, the movement of young-old movers into the area will likely continue, potentially offsetting any population losses associated with churn from outward movements of young leavers and old-old people.

Further, while less than two thirds of private dwelling stock is occupied by permanent Break O'Day residents, there is a considerable mismatch in housing suitability for those residents - predominantly an oversupply of bedrooms – alongside reported affordable housing shortages for new residents and seasonal workers. Over a third of private occupied dwellings are lone person households. Two thirds (65.6%) of those who live alone are aged 60 years or older (34.9% are aged 70 or older) which, in

addition to the risk of isolation and loneliness associated with old age, suggests additional challenges in terms of access to health care and social assistance as well as recreation and leisure activities, community involvement and well-being.

There are considerable economic and social opportunities for Break O'Day to leverage in relation to its ageing population and its relatively attractive lifestyle attributes.

However, without proactive intervention, the projected population age structure for Break O'Day - whereby 43.4% of the population is expected to be aged 65 years or older with a median age of 61.1 years - is unlikely eventuate given the population would be unable to support itself.

The Break O'Day population is at risk of a self-reinforcing, perpetual decline trajectory, despite the projections. To alter the projected population change trajectory for Break O'Day, effort should be directed at strategic policy responses to capture the opportunities associated with an ageing and old-old population and to directly influence the age profile of internal migration movements.

Potential levers for change

There are considerable economic and social opportunities for Break O'Day to leverage in relation to its ageing population and its relatively attractive lifestyle attributes.

An ageing population creates employment demand – predominantly new jobs in health care and aged-related services, but also, to a lesser degree due to the workforce profile of Break O'Day, due to replacement labour demand associated with an older workforce retiring and exiting employment.

This increasing demand for health care and age-related services creates more secure, less seasonal employment opportunities for the working age population who will need housing and education and care related services for their families.

Given skill and labour shortages throughout Tasmania due the ageing workforce, attracting workers to Break O'Day will be competitive and the area will need to leverage its comparative advantages, or invest further in its lifestyle attributes and amenities to attract (and retain) workers and their families in the area.

For each of the potential levers of change discussed below, consideration of access both within Break O'Day and between other periphery LGAs, and the enabling transport and logistic services which underpin the effectiveness of these leverage points, needs to be prioritised.

Embrace the silver and white economy

Given that the proportion and number of elderly people in Break O'Day is only going to increase over time, demand for aged and health related products and services will also only increase. This situation presents an economic opportunity to pursue.

Silver economy initiatives have two key aims, first, to foster economic growth by tapping into opportunities presented by an older population and second, to provide goods and services to address the growing needs of older consumers.

The silver economy encourages older people to live a more meaningful and quality life in their later life stages, driven by consumption of leisure activities, participation in society and the economy, as well as the provision of products and services for an older population. The silver economy is based on providing goods and services for an older consumer and can range from recreation and leisure,

entertainment and tourism, health-care products (crutches, glasses, hearing aids, adult diapers), mobility scooters, transport, and accommodation and assisted living and, even, an aquatic centre.

The white economy encompasses a new collective for economic growth based on the increasing demand for aged-focused needs; an eco-system of products and services for older people, particularly the old-old population. More specifically, the white economy refers to products, services and activities related to healthcare and care including the dependent, disabled and elderly. These products, services and activities include the meeting the existential needs of older people, needs of older consumers, needs of older employees and the needs of employers and organisations providing and servicing older people's needs.

White economy initiatives include investing in health care and its workforce including doctors, nurses and other health care specialists to adapt to the needs of an ageing population and related conditions, alongside new technologies and types of services which are fundamentally different to what is understood to be mainstream healthcare.

The increasing demand for health care services resulting from ageing may include shifting the focus of health care from prevention and curing to one that emphasises management of symptoms and the variability of symptoms, as demands on the health sector increase.

Of critical importance, particularly for Break O'Day, however, is that the white economy extends beyond just the provision of services, to transport and logistics, given the regional location of the area and proximity to the main health services provision for residents; Hobart, Launceston and to a lesser degree, Scottsdale, and also considers the expansion of initiatives such as telemedicine, remote monitoring and rehabilitation as well as career upskilling.

Improve the quality of schooling, education and training

Attracting and retaining working age individuals, couples and families in the Break O'Day area to meet the growing demand for non-seasonal work in the health, aged care and social assistance sectors will be dependent on meeting the needs of their personal circumstances. Often access to quality schooling and education is a high priority for working families.

It is evident from the data that Break O'Day families leave the area and enrol their children in educational institutions in their place of destination, whether that be primary school or secondary school, including non-government schools as well as vocational education and training and university.

According to MySchool data from the Australian Curriculum, Assessment and Reporting Authority (ACARA), enrolments St Helens District High School have increased marginally since 2018, from 499 to 509 in 2023. However, the number of students completing their senior secondary certificate at has declined from 11 completions (7 successfully) in 2018 to two completions in 2022 (zero successfully). For St Mary's District High School, enrolments have declined from 309 in 2018 to 263 in 2023. In 2018, one student successfully completed senior secondary school, as did one in 2022. In the years between, 2 completed senior secondary in in 2019, 3 in 2020 (2 successfully), and in 2021, 3 completed senior secondary school, none successfully.

To attract and retain professional, educated workers in the health care, aged care and social assistance sectors as well as trades like construction, to Break O'Day, it will be essential to improve the quality of schooling and education and training provision in the area, as well as ensure access to

affordable childcare. The risk is that workers will leave Break O'Day once their children reach high school age, if not beforehand.

Encourage investment in housing diversification

Combined with housing mismatch for current permanent residents, predominantly an oversupply of bedrooms, an increasing number of older, lone person households and a shortage of appropriate housing stock for new residents and seasonal workers, there is a need to diversify the housing offer in Break O'Day.

For older and ageing populations and smaller household sizes, changes in residential offerings and the provision of infrastructure and services will be required with a focus on access to health care and social assistance as well as recreation and leisure activities, including community involvement.

Working individuals, couples and families will need access to affordable housing options that meet their needs, and also provide an opportunity to achieve the great Australian Dream of home ownership and greater financial security, and thus, retention in the area.

Encouraging, facilitating and/or incentivising investment in diversified residential housing such as, lifestyle, active living, retirement and acute care offerings as well as seasonal worker accommodation may enable turnover of private housing stock and create a better match between supply and demand.

Revitalisation and repurposing of the built environment

As regional populations age and/or decline, town centres and public spaces also often deteriorate, creating a fragmented and under-utilised spatial structure. This can result in a disconnect between the changing needs of the community and the provision of public infrastructure, services and amenities.

The visible degradation (including vacant premises) of the built environment, for example houses, buildings and other public infrastructure can impact the perception of the place and detract people from living there.

In addition to the investment in housing diversification discussed above, policy initiatives that target the revitalisation and repurposing of a town centre, the associated public assets, and their periphery requires a shift from supply planning to demand planning.

Ensuring fit-for-purpose infrastructure, service delivery and connectedness within a community and within its periphery (for Break O'Day this would include North and North-East Tasmania) is key to successful regeneration and repurposing of the built environment in regions experiencing population ageing and/or decline.

Regeneration encourages a focus on the existing built environment and could include the demolition or restoration of vacant, old or non-energy efficient buildings as well as historical landmarks; the revitalisation, repurposing and 'right-sizing' of public infrastructure and streetscapes; including appropriate scaling to ensure both improved service provision and liveability in the region.