New South Wales Electoral Commission Voter Forecasts

Voter Trends Report

28 April 2020

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Executive Summary

- This report summarises the voter forecasts undertaken by .id (informed decisions) for the New South Wales Electoral Commission (NSWEC) and the highlights of change from 2019 to 2029.

- Voter growth in New South Wales from 2019 to 2029 is forecast to be 1.0% per annum, with similar rates in both Greater Sydney and Regional NSW.

- However, population growth of adults is forecast to be much higher in Greater Sydney than Regional NSW, as the voter share is much lower in Sydney.

- While the voter share in Regional NSW is forecast to remain relatively steady at just over 92%, Greater Sydney is assumed to decline from 79.4% in 2019 to 76.0% in 2029.

- Within Sydney, the greatest growth from 2019-2029 is expected in the west, with the largest net gains in the South West SA4 (+56.470 voters), Blacktown SA4 (+41.780 voters), Parramatta SA4 (+32,500 voters) and Baulkham Hills-Hawkesbury SA4 (+31,670 voters).

- Voter growth in some Sydney regions is much lower than adult population growth, notably in the City and Inner South and Parramatta SA4s where voter share is 60.5% and 68.1% respectively.

- Within Regional NSW, the greatest growth from 2019-2029 is expected in the Hunter Valley (excl. Newcastle) SA4 (+34.900 voters), Newcastle and Lake Macquarie SA4 (+27.300 voters), Mid-North Coast SA4 (+22,650 voters), Illawarra (+20,630 voters) and Capital Region SA4 (+20,350 voters).

- Voter growth is similar to overall adult population growth in most regions outside of Greater Sydney, with voter shares remaining at high levels from 2019 to 2029. Voter shares in 2019 in regional SA4s vary from 87% to 94%.

- Most suburbs within Sydney are expected to have increases in voters to 2029, based on solid levels of infill development throughout much of the established areas of Sydney. The main reasons for higher rates of growth relate to new housing opportunities in:
    1. New greenfield estates on the fringe of Sydney
    2. Large-scale apartment development around major centres, such as Parramatta, Kogarah or Macquarie Park
    3. Conversion of industrial land-use to residential in areas such as Melrose Park, Arncliffe or Zetland.

- Areas in Sydney that are decreasing in voters tend to have minimal development, a maturing population with a decreasing average household size and a declining voter share.

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- SA2 with the greatest voter growth in Greater Sydney from 2019 to 2029 include:
  - Riverstone - Marsden Park (+36,680)
  - Cobbitty - Leppington (+29,990)
  - Rouse Hill - Beaumont Hills (+18,800)
  - Austral - Greendale (+18,690)
  - Ingleburn - Denham Court (+8,250)
  - Waterloo - Beaconsfield (+8,010)
  - Homebush Bay - Silverwater (+7,200)
  - Kellyville (+7,170)
  - Warnervale - Wadalba (+6,510)
  - Prestons - Edmondson Park (+6,150)
  - Erskineville - Alexandria (+5,780)
  - Mulgoa - Luddenham -Orchard Hills (+4,940)
- The main areas of significant voter growth in Regional NSW are greenfield areas on the fringe of major centres, especially Newcastle, Wollongong, Canberra and Port Macquarie.
- Other areas of growth include Coastal and rural areas within commuting distance of larger regional service centres, such as Tamworth, Wagga Wagga, Nowra, Coffs Harbour and Orange.
- Some medium density housing growth can be expected to provide housing choice throughout much of Regional NSW, higher density housing growth is likely to be limited to the large centres, most notably in areas along the coast, such as Tweed Heads, Central Newcastle and Wollongong and Coffs Harbour.
- SA2 with the greatest voter growth in Regional NSW from 2019 to 2029 include:
  - Queanbeyan Region (+6,270)
  - Albion Park - Macquarie Pass (+4,940)
  - Maitland - West (+4,660)
  - Port Macquarie - West (+4,550)
  - Horsley - Kembla Grange (4,310)
  - Morisset - Cooranbong (+4,130)
  - Branxton - Greta - Pokolbin (3,920)
  - Thornton - Millers Forest (3,650)
- Little voter growth is expected in the western half of State, with the greatest decreases expected in the Riverina and along the Murray.

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List of abbreviations

ABS - Australian Bureau of Statistics

ERP - Estimated Resident Population

.id - informed decisions Pty. Ltd.

NSWEC - New South Wales Electoral Commission

SA1 - Statistical Area 1 (An ABS local unit of geography of about 200 households)

SA2 - Statistical Area 2 (An ABS unit of geography that roughly equates to a 'suburb' or 'locality')

SA4 - The most aggregate level of the ABS standard geography within Greater Sydney and Regional NSW. They are the equivalent to a broad region.

SAFi - Small Area Forecast information

1. Introduction

The New South Wales Electoral Commission (NSWEC) is the lead agency for the administration of State and Local Government Elections in the State of New South Wales. Under the NSW Constitution Act 1902, after every second State Election the boundaries of the electoral districts of the Legislative Assembly of NSW must be examined to ensure that they contain an equal number of eligible electors, with an allowance of +/- 10 per cent. This process is known as a 'Redistribution'. The Constitution Act requires that another Redistribution occur prior to the 2023 State General Election.

The mechanism for a Redistribution is through an Electoral Districts Redistribution Panel. The Electoral Act requires the Redistribution Panel to have regard to demographic trends within NSW and, as far as practicable, endeavour to ensure on the basis of those trends that, as at 17 April 2023, the number of electors enrolled in each electoral district will be equal, within a margin of allowance of 10 per cent more or less of the average enrolment in electoral districts at that date.

To that effect, informed decisions (.id) was engaged to provide voter forecasts at the SA1 level for all 18,395 SA1s in New South Wales. This document summarises the main findings of these forecasts, analysing patterns of growth in voters and voter share from 2019 to 2029. An additional *Methodology Report* is available that summarises the approach and steps taken to create voter forecasts.

The report will focus on two components:

- The growth in electors, with reference to the drivers of the underpinning growth in Estimated Resident Population (ERP) aged 18 and over.
- The difference in elector share between areas that creates a variation between growth in adult population and electors. In addition, the report will discuss the changing trends in elector share across NSW.

The report will drill down from the NSW level to the local level, focussing on the forecast hot spots of growth in both Greater Sydney and Regional New South Wales.

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2. Overview of NSW Growth and Voter Trends

The number of electors is expected to grow strongly in New South Wales from 2019 to 2029 at approximately 1.0% per annum. The rate of growth in electors is expected to lag the growth in overall adult population, which is consistent with a decrease in the share of voters to adult population. The historical and forecast trend in voter and adult population for NSW is depicted in Figure 1 below.

Figure 1: Historical and forecast voter and ERP growth, NSW, 2011-2029
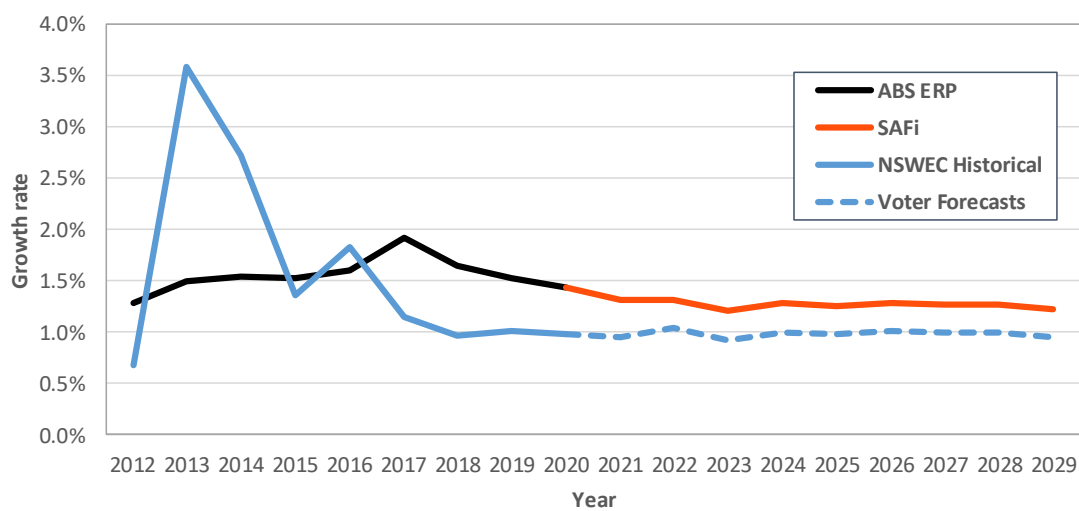
Source: ABS ERP; id, SAFi; NSWEC, Voter data

There is a significant jump in the elector data between 2012 and 2013, which is likely to be a data quality issue. The average in growth rates using both 2012 and 2013 is 2.1% which is much more consistent with the general rates of growth in ERP and electors. The large increase in voters in the years ending April 2013 and April 2014 may be related to activities of the NSWEC and increased validity of the electoral roll, especially around young voters. From 2015 to 2019, the rate of voter and ERP growth is much more commensurate, with ERP growth generally outpacing voter growth.

These patterns are forecast to continue to 2029, with ERP growing at approximately 1.3% per annum, while voter growth is expected to increase by 1.0%. This reflects the assumption of continued strong numbers of overseas migrants to 2029, with a high share of tertiary students, which should maintain a gap in the growth rates.

The underlying growth in ERP is expected to be higher in Greater Sydney than Regional NSW from 2019 to 2029. This is generally consistent with the historical trends from 2011 to 2019. The estimate of the rate of growth in Regional NSW briefly outpaced Greater Sydney in 2019, although this figure appears to be an aberration. The rate of voter growth spiked in 2013 and 2014 in both areas, in line with the trend in NSW and likely to be influenced by the actions of the NSWEC in improving the accuracy of the electoral roll.

From 2019 to 2029, the rate of growth in voters is expected to be similar in both Greater Sydney and Regional NSW, although the growth rate in ERP is likely to be notably higher in Greater Sydney. Both areas are expected to increase by about 1% per annum over the period. Figure 2 below shows the historical and assumed rate of growth of ERP and voters from 2011 to 2029 for Greater Sydney and Regional NSW.

Figure 2: Historical and forecast voter and ERP growth, Greater Sydney and Regional NSW, 2011-2029
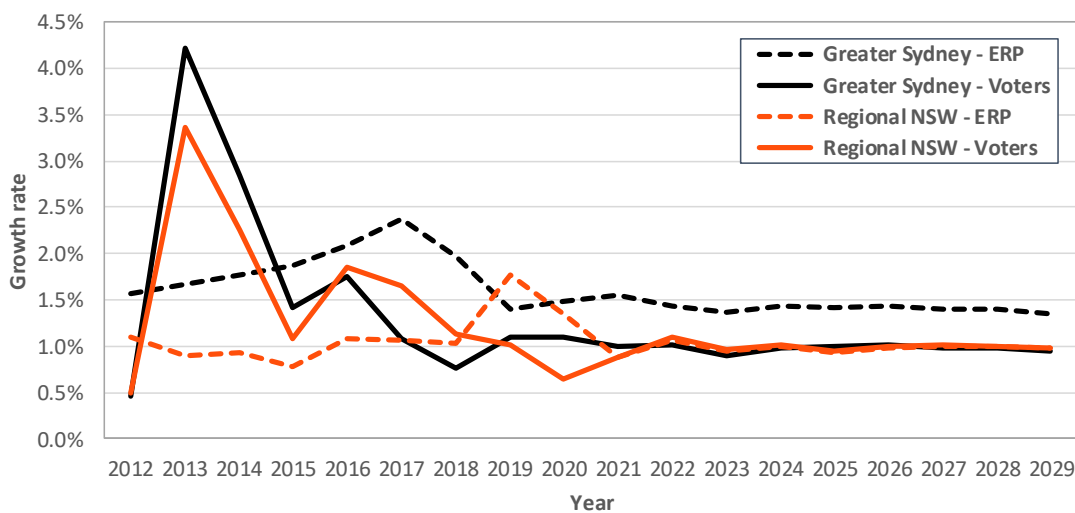
Source: ABS ERP; id, SAFi; NSWEC, Voter data

The difference in voter shares explains the gap between ERP and voter growth in Greater Sydney. The voter share is simply derived by dividing the voting population by the estimated population aged 18 and over. There is very little difference in the growth rate of voters and ERP in Regional NSW, which is a result of the high and sustained voter share outside of Sydney.

The share of 18+ population as voters in NSW was estimated at 84.0% in 2019. The share of voters rose from 83.4% in 2011 to 85.5% in 2016, before falling to 2019. As the share of adult ERP who do not vote is generally recently arrived migrants, especially overseas students, Greater Sydney had a much lower share of voters as a proportion of 18+ ERP in 2019 at 79.4% compared to Regional NSW,

where the figure is estimated to be 92.6%. Figure 3 below shows the historical and assumed share of voters to ERP in New South Wales, Greater Sydney and Regional NSW from 2011 to 2029.

Figure 3: Forecast share of population 18 and over as voters, 2011-2029

Region	2011	2016	2019	2021	2023	2025	2027	2029
NSW	83.4%	85.5%	84.0%	83.2%	82.8%	82.3%	81.9%	81.4%
Greater Sydney	80.3%	81.6%	79.4%	78.7%	78.0%	77.3%	76.7%	76.0%
Regional NSW	88.8%	92.7%	92.6%	92.0%	92.0%	92.0%	92.0%	92.1%

The changing share of voters over time forms an inconsistent trend. The increase in voter share between 2011 and 2016 is counter-intuitive, given the very high levels of overseas migration to Australia over the last ten years and the higher than average share that has gone to NSW. The pattern from 2016 to 2019 seems to be more consistent with what would be expected, with a minor fall in share. The pattern of increasing share displayed between 2011 and 2016 may be a reflection of activities by the NSW Electoral Commission to ensure that a greater share of the adult population is on the electoral roll (especially with the adoption of automatic enrolment of young adults).

The NSW trends in general are driven by Greater Sydney, as it has the lion's share of NSW's population (about 65%). Regional NSW experienced an increased voter share between 2011 and 2016, before remaining comparatively stable at just above or below 93% between 2016 and 2019.

The forecast share of voter share is expected to continue to fall in Greater Sydney in line with the trends from 2016 to 2019 and consistent with its continued attraction of overseas migrants. Regional NSW is forecast to remain comparatively stable at just on 92% from 2019 to 2029.

Opportunity

3. Voter growth in NSW by SA4: 2019-2029

To get an understanding of broader growth trends within Greater Sydney and Regional NSW, information is presented at the SA4 level. This is the most aggregate level of the ABS standard geography within Greater Sydney and Regional NSW. There are 28 broad regions in NSW, with 15 in Greater Sydney (including the Central Coast) and 13 in Regional NSW.
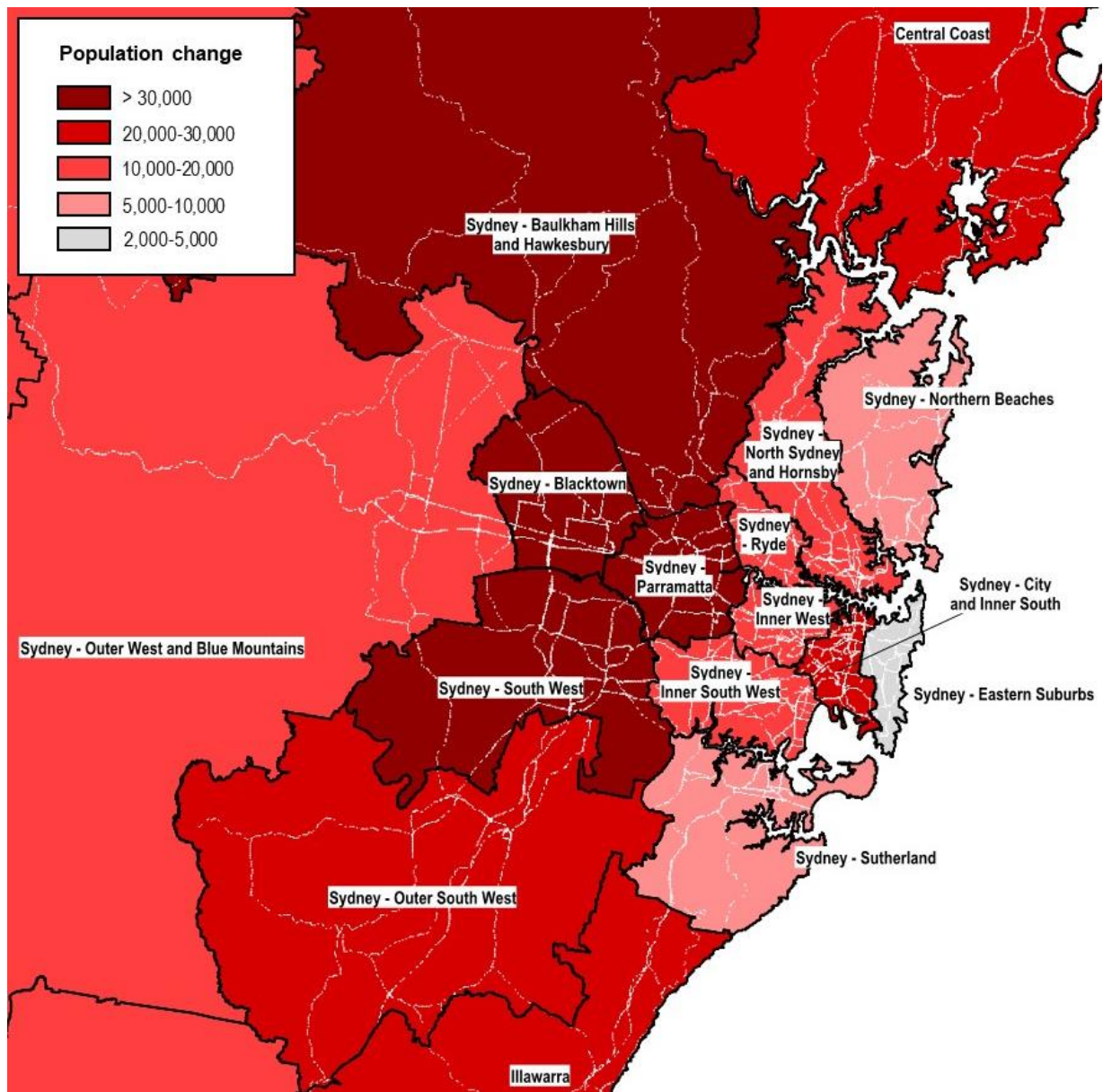
3.1 Greater Sydney

Within Sydney, voter growth is expected in all regions. It reflects the many opportunities for dwelling growth in at least some part of each region. The outer areas are driven by new greenfield growth, while growth in established areas is typically driven by apartment growth around major transit and employment centres, such as Macquarie Park, Hurstville or Parramatta. There is also strong voter growth expected in areas that are transitioning from industrial to residential land uses, such as Arncliffe, Zetland and Melrose Park. The voter growth in some of the established areas lags behind the overall growth in adult population, as areas connected to public transport or close to universities tend to attract a higher share of non-resident adults and overseas tertiary students (lower voter share).

The largest amount of voter growth is expected in the west of Sydney in the Parramatta, Baulkham Hills-Hawkesbury, South-West and Blacktown Regions. The voter growth in the Parramatta Region reflects significant gains in high density housing, particularly in a few locations, such as Central Parramatta, Carlingford, Homebush Bay and Wentworth Point, while the majority of the voter growth in the other regions is a result of new large-scale greenfield development. See Figure 4 below.

By comparison, the amount of voter growth expected in the Eastern Suburbs, Sutherland and Northern Beaches Regions is expected to be moderate. While each of the regions has defined precincts or development areas where greater dwelling density is expected to occur, there are fewer areas that are expected to grow substantially.

The City and Inner South Region is expected to have strong voter growth, but significantly lower than growth in the adult population. This is because the voter share in the region is especially low. As of 2019, the Region was estimated to have a voter share of 60.5%, which is the lowest region in Sydney. See Figure 5 below.

Figure 4: Forecast growth in voters by SA4, 2019-2029

Source: id, SAFi; NSWEC, Voter data

Figure 5: Voter Share by Greater Sydney SA4, 2019

Region	Voter %	Region	Voter %	Region	Voter %
Central Coast	94.0%	Syd. - Northern Beaches	87.3%	Syd. - Eastern Suburbs	74.1%
Syd. - Sutherland	92.1%	Syd. - South West	81.8%	Syd. - Inner West	73.2%
Syd. - Outer West & Blue Mts.	90.4%	Syd. - Blacktown	80.7%	Syd. - Ryde	73.1%
Syd. - Baulk. Hills & Hawkes.	88.9%	Syd. - North Syd. and Hornsby	80.4%	Syd. - Parramatta	68.7%
Syd. - Outer South West	88.8%	Syd. - Inner South West	75.7%	Syd. - City & Inner Sth.	61.0%

Source: id, SAFi; NSWEC, Voter data

Voter share patterns are expected to change over time. The patterns presented are based on SA1 data aggregated to SA4 level, using assumptions at the SA2 level. All regions in Greater Sydney are expected to decrease in share, which is indicative of recent patterns of change. The largest falls are expected in the established middle suburban areas of Sydney, notably around Ryde, Parramatta and Canterbury. Due to the arrival of more recently arrived overseas-born people, these areas are expected to have a noticeably lower voter share over time. By contrast, the Central Coast, as well as the Northern Beaches and Eastern Suburbs SA4s are forecast to be less affected by rising shares of non-residents in the population 18+. This may be unexpected in the Eastern Suburbs SA4, given the location of the University of New South Wales in Kensington. This will be explored in detail below.

Figure 6: Forecast change in voter share, Greater Sydney SA4s, 2019-2029
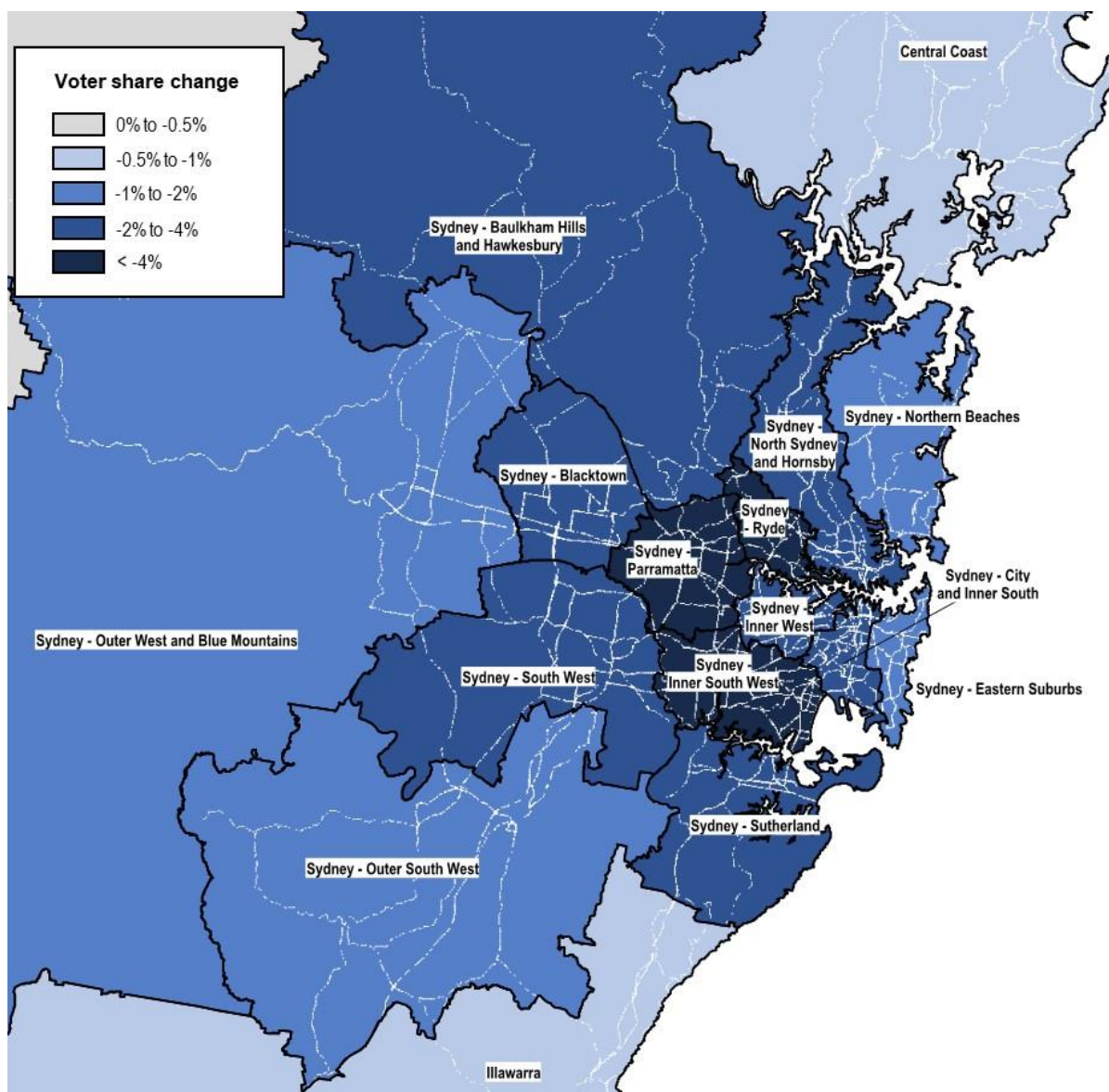
Source: id, SAFi; NSWEC, Voter data

3.2 Regional NSW

Regional NSW is expected to experience voter growth in all regions, although the increases in the Far West and Orana, as well as the Riverina SA4s is forecast to be relatively moderate. The largest amount of growth is expected in the Hunter Valley excluding Newcastle Region, with strong growth along parts of the coast, such as in the Mid North Coast, Illawarra, as well as the Newcastle and Lake Macquarie Regions. There is also substantial growth forecast for the Capital Region, which represents population and therefore voter 'overspill' growth from Canberra into the Queanbeyan area, Murrumbateman, Yass and along the corridor towards Goulburn.

There is comparatively less voter growth in the west of the State. There is minimal growth in the Far West and Orana and the Riverina SA4s and moderate rates of growth in New England and the North West and Murray SA4s. This picture is slightly deceptive, with voter growth most likely to be concentrated in a few locations within these regions. See Figure 7 below.

Figure 7: Forecast growth in voters by SA4, 2019-2029
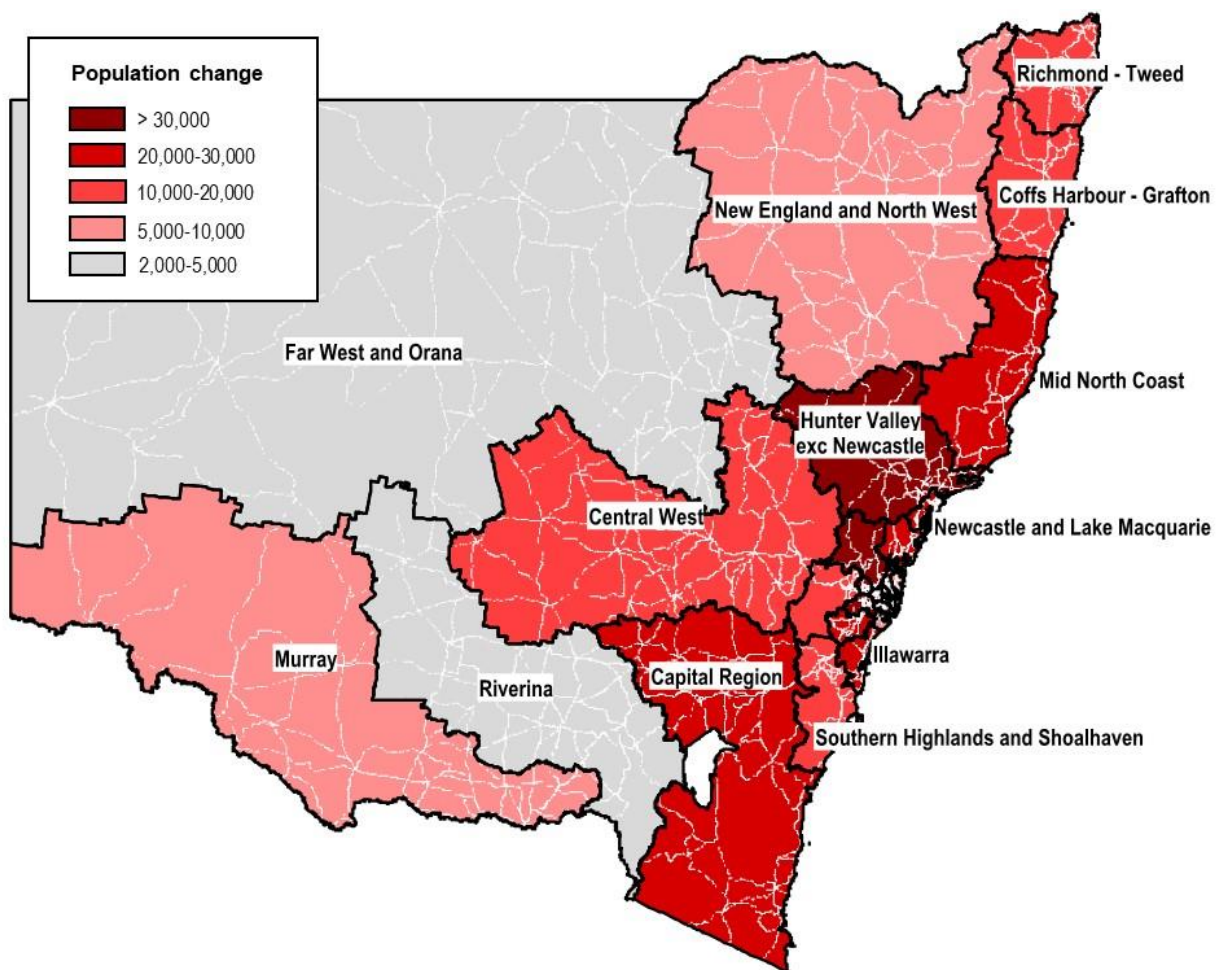
Source: id, SAFi; NSWEC, Voter data

Unlike many regions in Greater Sydney, the SA4s in Regional NSW have high voter shares. This means that there is a strong correlation in most areas between growth in the adult population and voter growth. Of the 13 SA4s in Regional NSW, 11 of the Regions are above 90% in voter share. See Figure 8 below.

Figure 8: Voter Share by Regional NSW SA4, 2019

Region	Voter %	Region	Voter %	Region	Voter %
Mid North Coast	95.4%	Coffs Harbour - Grafton	93.6%	Illawarra	90.6%
Southern Highlands & Shoalh.	94.7%	Central West	92.5%	Riverina	89.6%
Hunter Valley exc Newcastle	94.3%	Richmond - Tweed	91.9%	Murray	87.8%
Newcastle & Lake Macq.	93.9%	New England & Nth West	91.1%		
Capital Region	93.7%	Far West & Orana	90.2%		

Source: id, SAFi; NSWEC, Voter data

The voter share is lowest in the Murray Region. This seems to relate the high share of non-resident agricultural workers in the Wentworth area. By contrast, the highest share is estimated in the Mid North Coast SA4. This region has a higher share of its population as older people, who are more likely to be citizens. The region is also less likely to have any significant number of overseas students, as tertiary education options are limited.

The voter share is expected to change in these regions, although the level of change is expected to be comparatively small compared to the changes in Greater Sydney. An important component for changing voter share is the number of overseas arrivals. Most SA4s in Regional NSW do not attract a significant number of overseas migrants, with the tertiary education sector less prominent than in Sydney.

The regions that are expected to fall by the greatest amount include the Riverina, New England and North West and Murray SA4s. All of these regions have some attraction to overseas-born persons, notably Albury, Wagga Wagga and Armidale as centres of tertiary education. Interestingly, the Newcastle and Lake Macquarie is expected to remain relatively stable, despite having a strong tertiary education role. This may relate to the strong out migration of Australian citizens, along the coast from Sydney to this and adjacent SA4s (Mid-North Coast and Hunter Valley excluding Newcastle). See Figure 9 below.

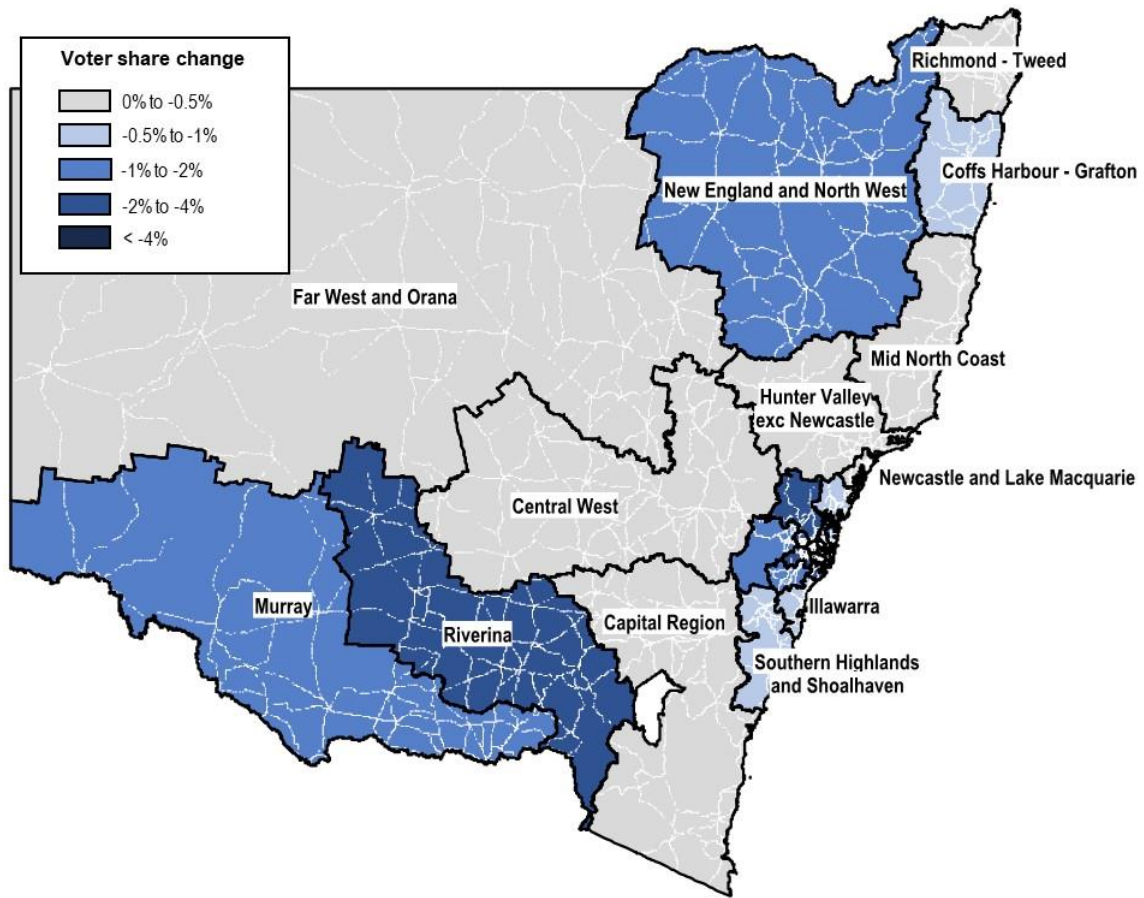**Figure 9: Forecast change in voter share, Regional NSW SA4s, 2019-2029**

Source: id, SAFi; NSWEC, Voter data

4. Voter growth in Greater Sydney: 2019-2029

This section details the forecast voter growth in Greater Sydney by SA2. This is a level of geography comparable to a suburb or aggregate of suburbs. The analysis is presented by regions within Sydney.

4.1 Central Coast

There is considerable voter growth forecast for the Central Coast between 2019 and 2029. The largest areas of growth are in areas with large increases in dwellings. These include Warnervale - Wadalba, Gosford - Springfield, The Entrance, Lake Munmorah - Mannering Park, Summerland Point - Gwandalan and Umina - Booker Bay - Patonga. By contrast the number of voters in Kariong, Saratoga - Davistown, Kincumber - Picketts Valley and Budgewoi - Buff Point - Halekulani is expected to remain relatively stable. See Figure 10 below.

Figure 10: Voter growth by SA2, Central Coast, 2019-2029
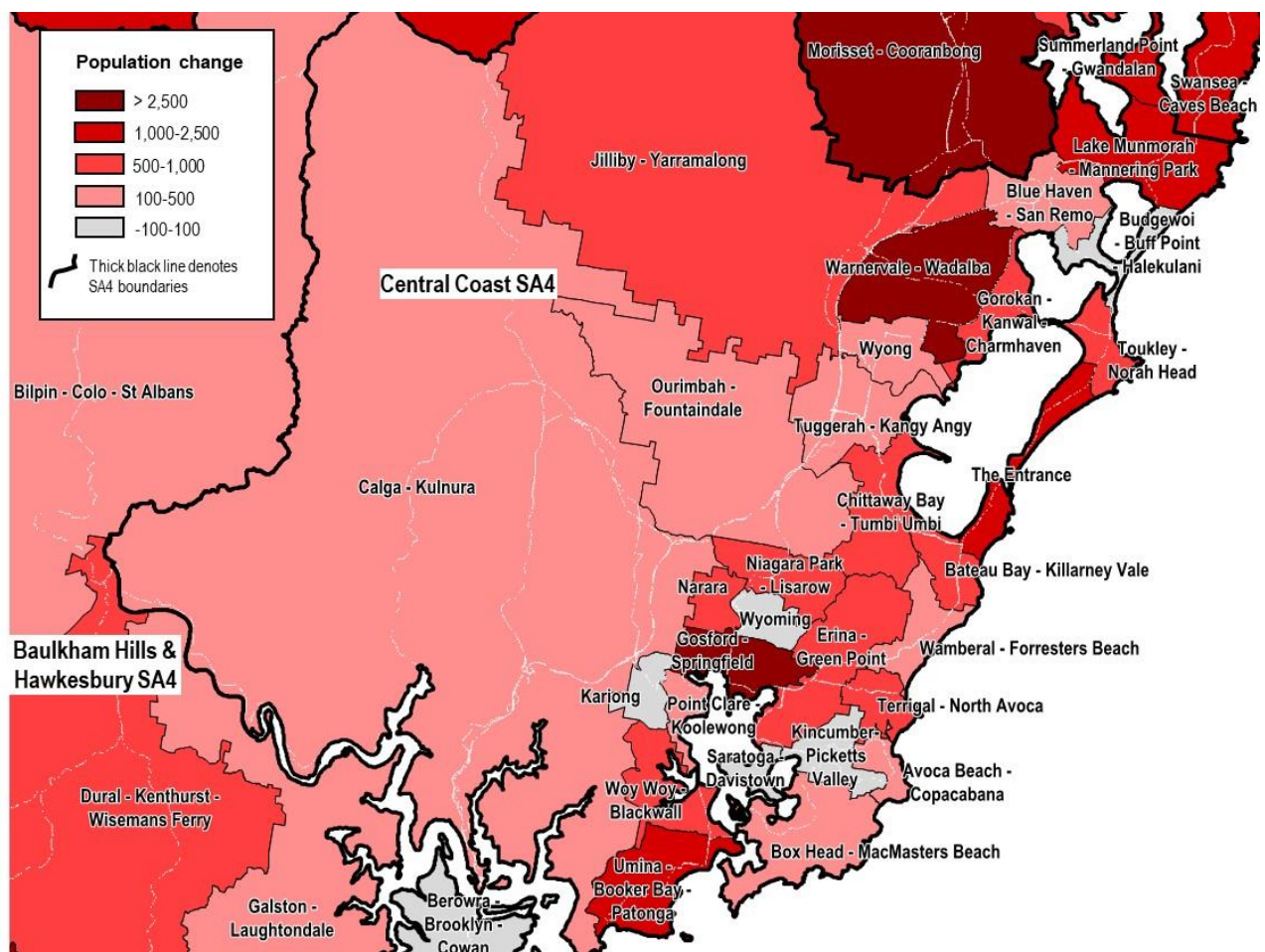
Source: id, SAFi; NSWEC, Voter data

In areas such as Warnervale-Wadalba, the large increases are due to new greenfield subdivisions. In other areas, such as Gosford-Springfield and The Entrance, the growth is driven by high-density development in and around the major commercial centres. Over time, the Central Coast has utilised much of its designated greenfield land. In many areas, such as Umina, Bateau Bay, Narara and Lake Munmorah, the urban form has increased in density over time, with larger lots converted to units and townhouses. This process is expected to continue across much of the Central Coast, providing opportunities for population and therefore voter growth.

There is a strong correlation between overall ERP growth and voter growth, with SA2s in the Central Coast boasting high voter shares. Gosford-Springfield has the lowest share in 2020, with 86% of the adult population as voters. This correlates to the location having a higher share of young overseas-born.
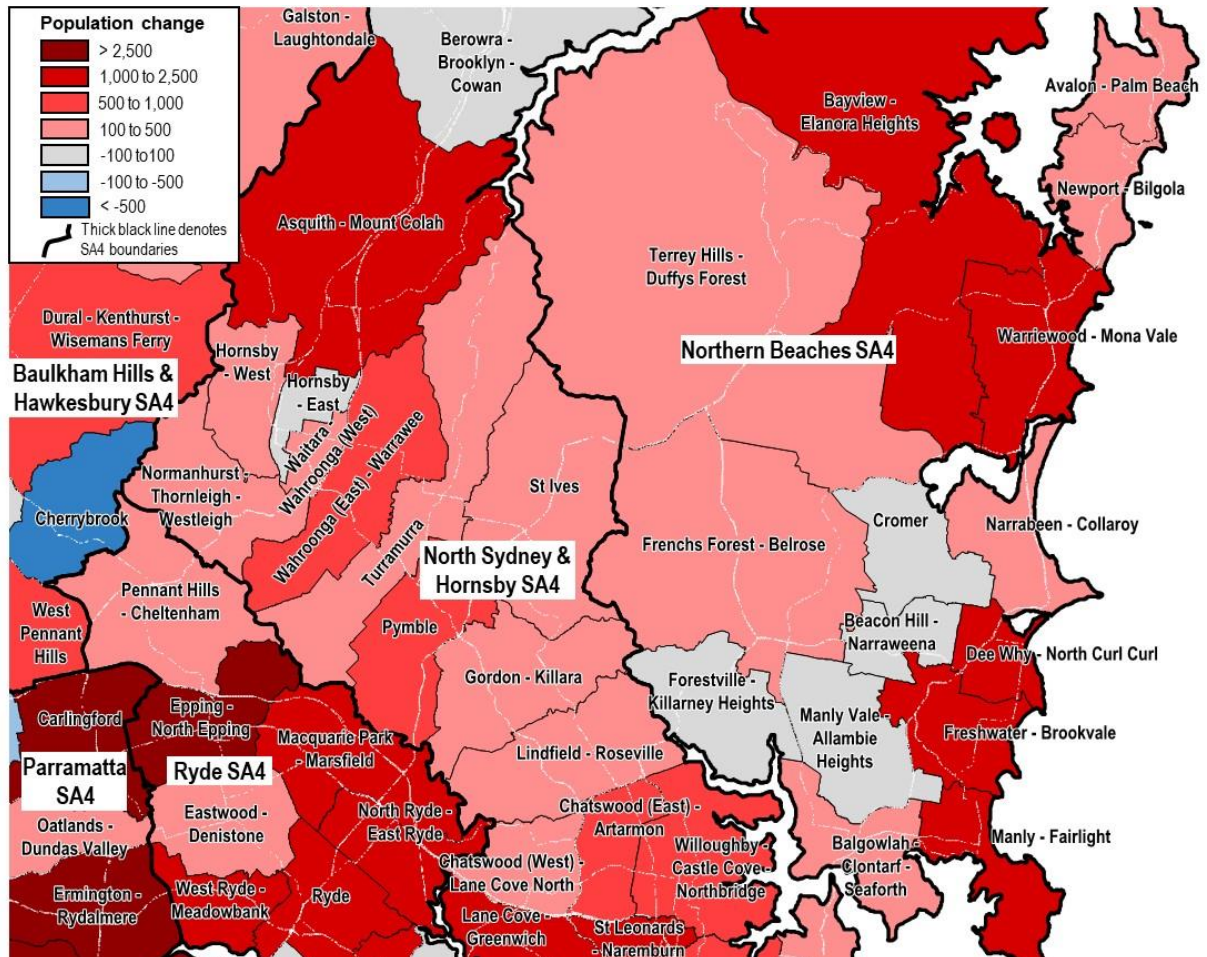
4.2 Northern Sydney

Most SA2s in Northern Sydney are expected to grow in voters between 2019 and 2029. The largest increases are associated with large-scale high density and medium density apartment development. The largest increases are expected in the SA2s of Ermington-Rydalmere Epping-North Epping and Carlingford. The voter growth in the Epping area is aided by the rezoning of many of the low-density areas around the train station for apartment construction. The station is a public transport hub and a logical place for greater housing density. Growth in the Ermington-Rydalmere SA2 is driven by changing industrial land uses to residential in Melrose Park. Carlingford also has large areas that are being converted to high density living.

There is significant voter growth expected in areas around Ryde, although the voter share in these areas is not especially high and falling, meaning that growth is smaller than growth in 18+ population. Other areas of significant voter increase include Asquith-Mount Colah (notably areas along the Newcastle Railway / Pacific Hwy corridor), along the coast from Manly to Dee Why and the St Leonards and Lane Cove Areas. The voter growth in the Bayview Heights - Elanora Heights SA2s and Warriewood - Mona Vale is due to proposed development of the Ingleside and Warriewood areas. The former area is currently in the planning stages.

By comparison, there is expected to be comparatively less voter growth in areas away from good public transport linkages. Many of the inland areas in the Northern Beaches Region are expected to be stable between 2019 and 2029. The Cherrybrook SA2 is expected to decrease notably between 2019 and 2029, which reflects the maturity of the population (lots of adult children expected to

leave home over the next ten years) and only moderate rates of dwelling growth during that time. In addition, Cherrybrook SA2, like many of the areas is expected to have a decreasing share of voters, relative to adult population growth. See Figure 11 below.

Figure 11: Voter growth by SA2, Northern Sydney, 2019-2029

Source: id, SAFi; NSWEC, Voter data

Interestingly, some of the areas in Northern Sydney that have experienced vast voter growth over the last decade are coming to the end of their growth cycle. These areas include Chatswood and Waitara, where the capacity for further residential growth has reduced as sites have been developed for residential.

There is a wide variation in voter share that complicates the growth patterns in this region. Areas with high density development around major public transport hubs, such as Macquarie Park and Chatswood tend to have low voter shares. More stable and comparatively 'isolated' areas, such as the Barrenjoey Peninsula and parts of the Northern Beaches have high voter shares. The forecast trend in voter share to 2029 sees little change in the wealthier areas along the coast, while areas on the major railway hubs area forecast to continue to drop in voter share.

4.3 Inner Sydney

There are strong contrasts in voter change in Inner Sydney from 2019 to 2029. There is a strong amount of growth in large parts of the inner suburbs, notably to the south of the city, most notably in areas that have and continue to convert from industrial and warehousing to high-density housing. These areas include the SA2s of Waterloo - Beaconsfield (+8,000 voters), Erskineville - Alexandria (+5,780 voters), Mascot - Eastlakes (+3,100 voters) and Arncliffe - Bardwell Valley (+2,560 voters). See Figure 12 below.

Figure 12: Voter growth by SA2, Inner Sydney, 2019-2029

Source: id, SAFi; NSWEC, Voter data

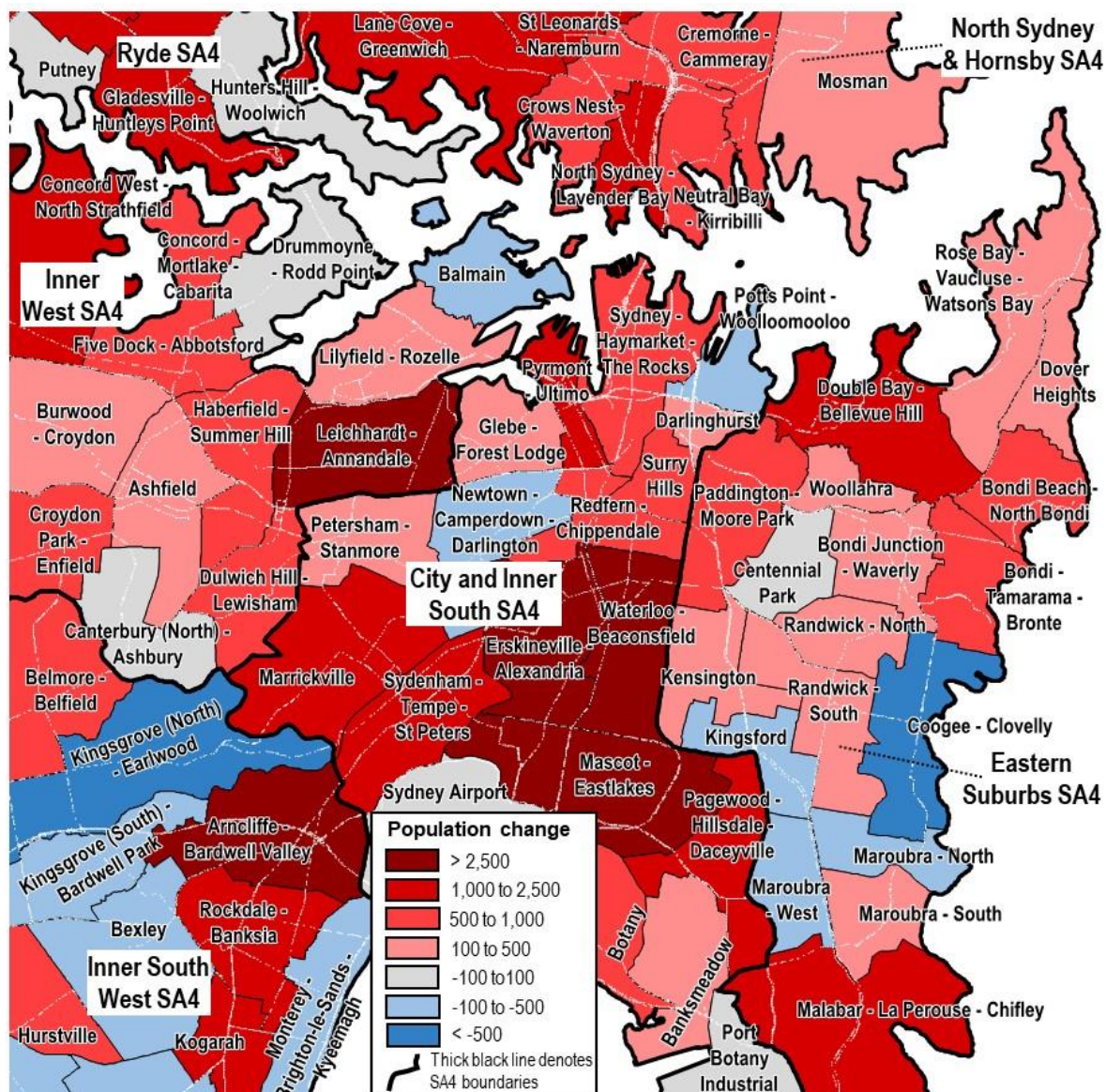Leichhardt - Annandale is also expected to increase greatly between 2019 and 2029, with apartment construction around commercial areas, some conversion of industrial land to residential uses, as well as more medium-density housing. Interestingly, the CBD and surrounding areas are not forecast to increase to this degree due to dwindling residential opportunities and competition for other land uses, notably office space, as well as extremely low voter shares.

By contrast, some areas are expected to have a fall in voter numbers. In many cases, these are areas that should have a stable dwelling stock and the maintenance of relatively low-density residential form. In other cases, the growth in dwelling is expected to be moderate, but voter share is expected to fall. Areas following this trend in the eastern suburbs include Coogee-Clovelly, Kingsford and two of the Maroubra SA2s. Areas following this trend in the inner south-west include Kingsgrove and Bexley, while in the inner city, Potts Point - Woolloomooloo, Balmain and Newtown - Camperdown - Darlington are also expected to experience a loss of voters.

Population growth in Inner Sydney is much higher than voter growth, as many areas have a low voter share, with large numbers of non-citizens, especially tertiary students. In 2019, the lowest voter shares in the Inner Sydney Region were in the SA2s of Sydney - Haymarket - The Rocks (29.2%), Pyrmont - Ultimo (44.6%), Waterloo - Beaconsfield (47.7%), Kensington (49.2%) and Kingsford (49.4%).

4.4 Southern Sydney and Sutherland

The Southern Sydney region is expected to have less voter growth than most other parts of Sydney. There are several areas that should increase between 2019 and 2029, based on increased dwelling densities, especially around major commercial centres, such as Rockdale, Kogarah, Sutherland, Miranda and Caringbah. There are some modest greenfield releases in the region which will boost voter growth, such as at Greenhills Beach to the north of Cronulla and the former Riverlands Golf Course at Milperra.

However, many areas are expected to lose voters in this region, which reflects a relatively stagnant dwelling stock, only minimal or moderate growth in adult population, and decreasing voter shares. This pattern is likely to affect most areas bordering the Georges River, most notably the Sylvania - Taren Point SA2, where there is expected to be a decrease of more than 500 voters between 2019 and 2029. See Figure 13 below.

Figure 13: Voter growth by SA2, Southern Sydney and Sutherland, 2019-2029
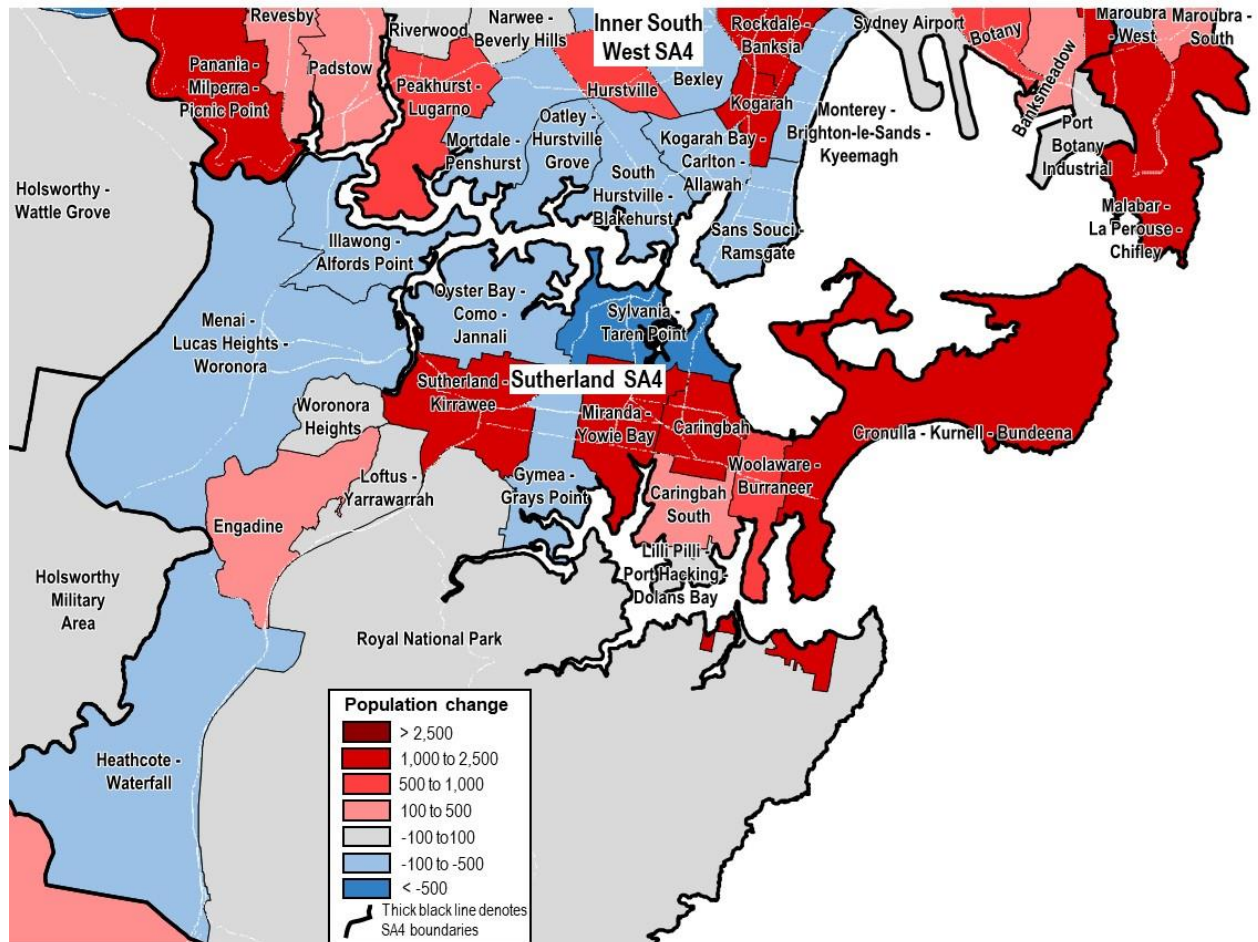
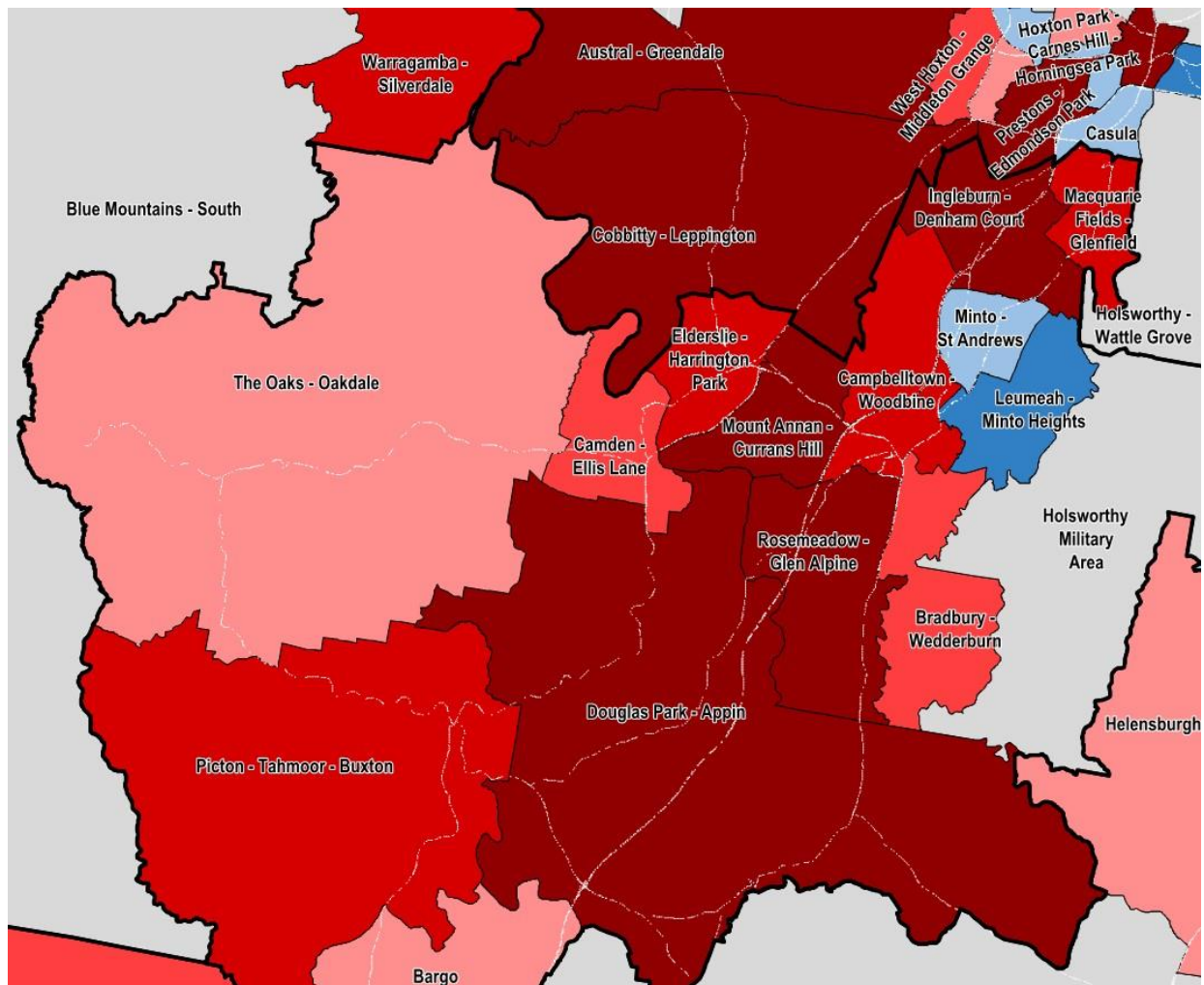*Source: id, SAFi; NSWEC, Voter data*

Most areas are expected to decrease in voter share within this region, which contributes to the lower rates of voter growth. However, many areas in the outer south, especially those in the Sutherland area have a very high voter share at more than 90%, which means that there is still a strong correlation between trends in ERP and voter change.

The major commercial and transport hubs on the Illawarra line have much lower voter shares, consistent with their attraction to young overseas-born students and permanent residents. These areas include Rockdale - Banksia, Kogarah and Hurstville. There is also a strong correlation between the areas expected to decrease in voter share and a large increase in high density dwellings. These include Hurstville, Rockdale - Banksia, Kogarah, Miranda-Yowie Bay, Caringbah and Sutherland - Kirrawee. By comparison, areas such as Sans Souci - Ramsgate, Lilli Pilli - Port Hacking - Dolans Bay, Woronora Heights and Loftus - Yarrawarrah are expected to maintain more stable voter shares.

4.5 Outer South Western Sydney

The outer south west of Sydney is expected to be one of the key voter growth regions in NSW from 2019 to 2029. Most areas are expected to increase strongly in the region, generally as a result of high rates of greenfield development. The corridor from Liverpool to Picton has dozens of development fronts, with most of Australia's major land developers active here. The scale of growth in the region is impressive with the Cobbity-Leppington SA2 forecast to increase by almost 30,000 additional voters over the ten year period, while Austral-Greendale is forecast to grow by about 18,700 voters and Ingleburn - Denham Court by more than 8,200 voters. See Figure 14 below.

Figure 14: Voter growth by SA2, Outer South Western Sydney, 2019-2029

Source: id, SAFi; NSWEC, Voter data

Some areas that have been growing strongly in recent years are expected to slow as residential development potential is exhausted. These areas include Hoxton Park, West Hoxton and Camden. Some of the older areas around Campbelltown are expected to decrease in population. In some

cases, this is a result of the maturity of the population, with adult children leaving home and decreasing voters share. Some areas are affected by public housing redevelopment which is resulting in the temporary loss of dwelling stock. It is notable that the Campbelltown-Woodbine SA2 has considerable voter growth forecast, which is assumed to be driven by apartment development in the commercial heart of Campbelltown.

There is a strong correlation between overall ERP growth and voter growth, with SA2s in Outer South Western Sydney boasting high voter shares. Campbelltown - Woodbine has the lowest share in 2019, with 80.1% of the adult population as voters. The older, more established parts of this region are forecast to decrease voter share, while the rapid-growth new development areas are expected to maintain a more stable voter share.

4.6 Middle Western Sydney

The established middle western suburbs of Sydney are highly variable in voter growth prospects between 2019 and 2029. The major regional centres, such as Parramatta, Bankstown and Liverpool are expected to increase strongly, as are other areas with strong public transport connectivity including Merrylands - Holroyd and Concord West - North Strathfield. Ermington - Rydalmere and Homebush Bay - Silverwater are expected to increase strongly on the back of conversion of industrial and warehousing uses to higher density residential.

The areas on the south-western edge of this region, such as Prestons-Edmondson Park are forecast to grow strongly as a result of substantial greenfield land. The highest areas of growth within this region between 2019 and 2029 are expected in Homebush Bay - Silverwater, with almost 7,200 additional voters forecast and Prestons-Edmondson Park, with about 6,150 additional voters.

Many areas in the established inner and middle western suburbs of Sydney could expect some increase in dwellings through small-scale apartment, units and townhouse construction. This provides additional housing opportunities for people and therefore voters. This trend applies to many areas with moderate growth in the Parramatta and Inner South West SA4.

Nonetheless, SA2s to the west of Fairfield as well as those around Liverpool are expected to decline or be much more stable in voter numbers. These areas were typically developed in the last thirty to forty years, predominantly in a lower density form. They currently have limited potential for further residential growth, based on planning consideration. They often have a relatively mature population, with lots of adult children who will be leaving the family home. In the case of the areas developed in

the 1980s, such as St Johns Park or Greenfield Park, considerable ageing is likely to 2029. See Figure 15 below.

**Figure 15: Voter growth by SA2, Middle Western Sydney, 2019-2029**
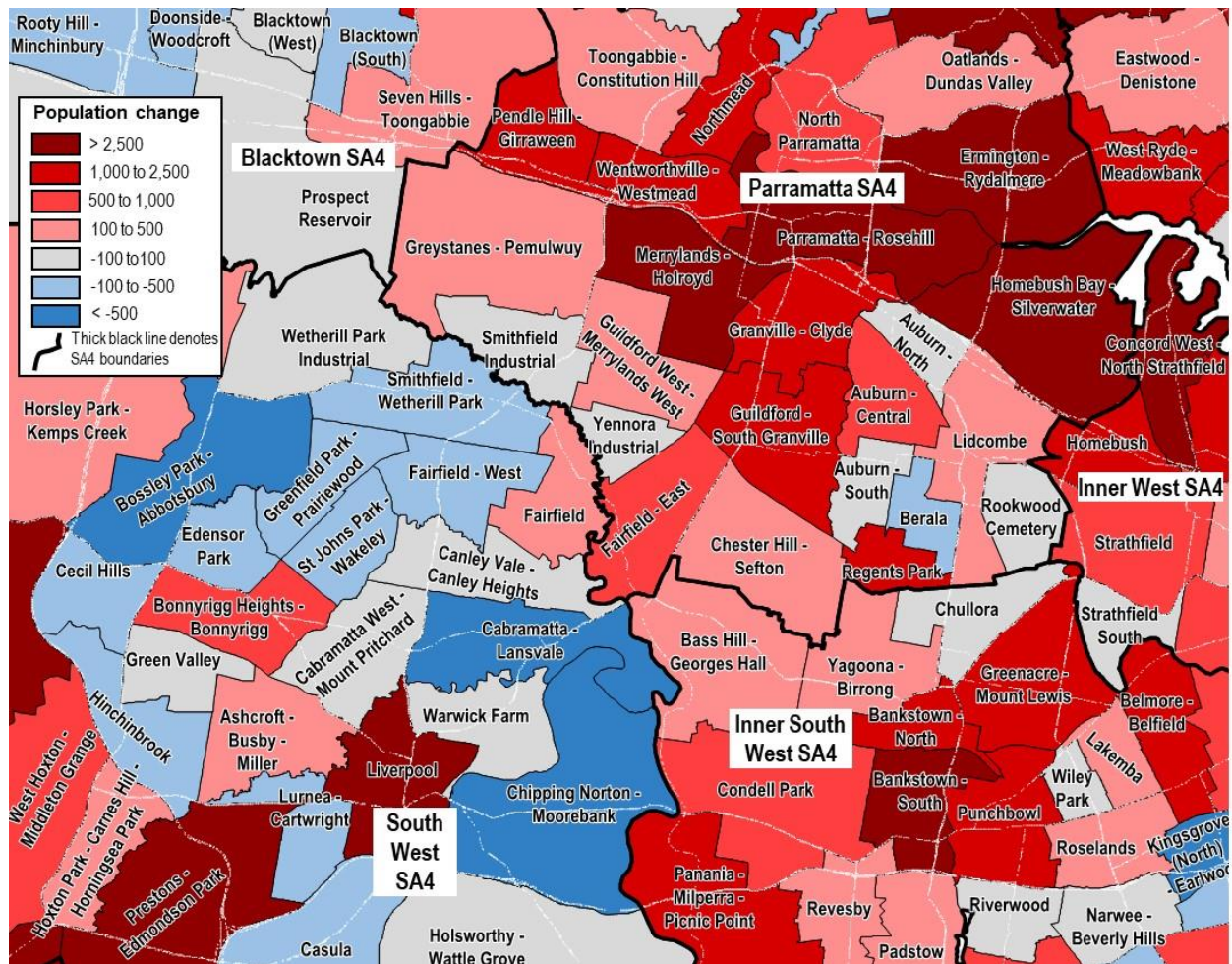
Source: id, SAFi; NSWEC, Voter data

The growth in voters in areas around Parramatta and Homebush Bay is likely to be considerably lower than growth in the adult population. This is because of the higher share of overseas-born, especially recently arrived, with voter shares typically only around 40%. In areas such as Bankstown, the voter share figure is closer to 70%, while Prestons - Edmondson Park has almost 90% of its adult population as voters. However, due to the impact of overseas migration into this region, most areas are forecast to have a significant decrease in voter share to 2029. The areas with the greatest decline in voter share include North Parramatta, Parramatta - Rosehill, Homebush Bay - Silverwater, Auburn - North, Lidcombe, Chullora, Fairfield, Seven Hills - Toongabbie and Bankstown - South.

4.7 North Western Sydney

The North Western Sydney region contains the North-Western Growth Corridor of Sydney. These areas are growing strongly due to high rates of greenfield development in suburbs such as Rouse Hill, Kellyville, Marsden Park, Riverstone, Box Hill and Schofields. The greatest increase between 2019 and 2029 by SA2 in this region is forecast for the Riverstone - Marsden Park SA2 with almost 36,700 extra voters. Rouse Hill - Beaumont Hills SA2 is forecast to increase 18,800 voters and the Kellyville SA2 by almost 7,200 over the same period. See Figure 16 below.

Figure 16: Voter growth by SA2, North Western Sydney, 2019-2029
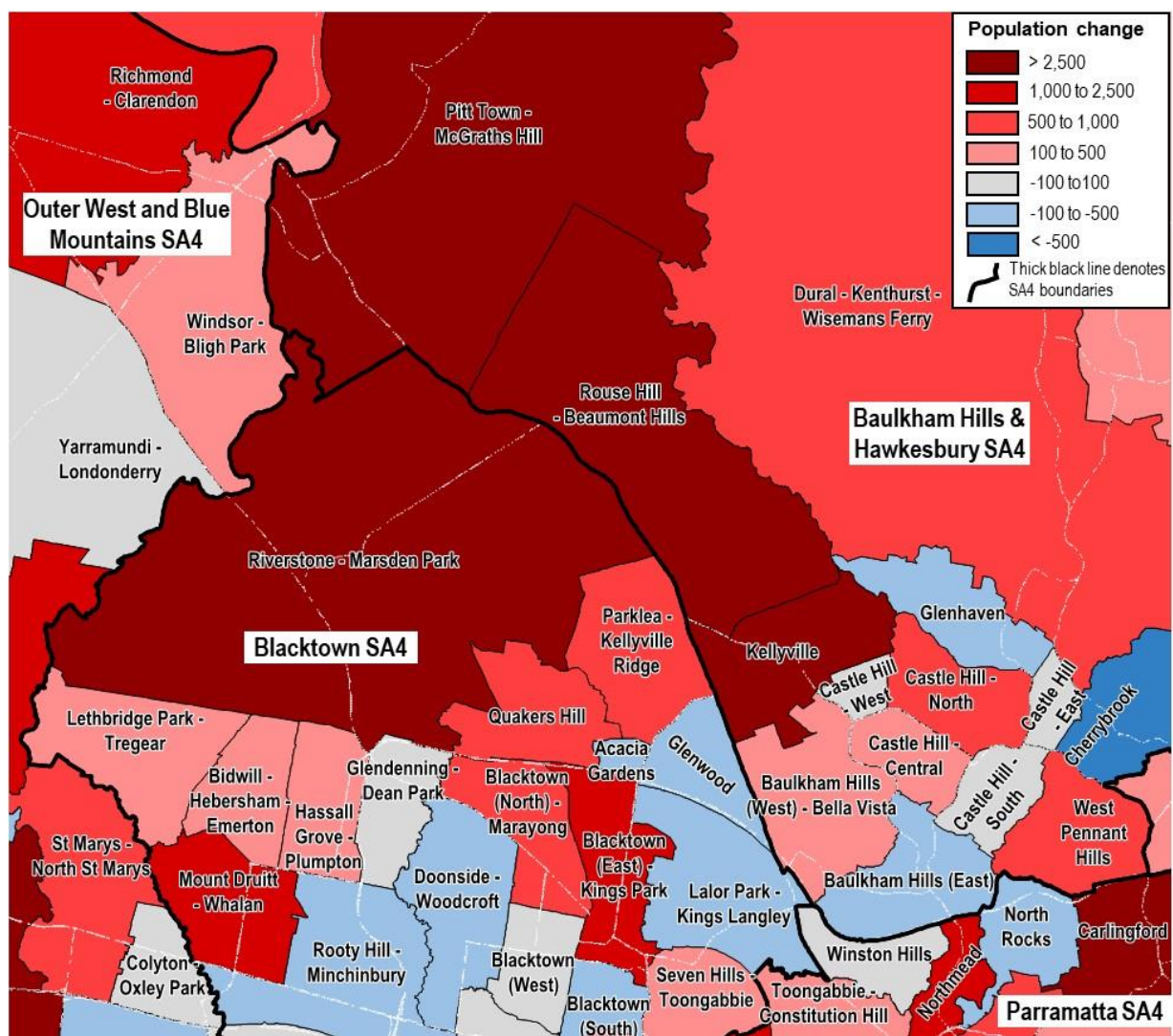
Source: id, SAFi; NSWEC, Voter data

SA2s to the south of these growth areas that have been growing rapidly over the last five to ten years are expected to slow between 2019 and 2029. These areas include Parklea - Kellyville Ridge and Quakers Hill. While much of the growth in this region is due to greenfield development, SA2s

such as Blacktown (East) - Kings Park, Mount Druitt - Whalan, Northmead and Castle Hill - North are forecast to have substantial voter growth due to increased apartment construction. Many of these areas are identified for higher density due to their good public transport access.

Many of the areas in the southern part of the Blacktown SA4 are expected to decrease in voters. This is because most of these areas are built-out and minimal increases in dwelling stock are anticipated. Many of these areas have an ageing population, with young adults likely to decrease in the coming decade, as children depart the family home. As these areas have a declining voter share forecast, the result is moderate voter loss.

The trend of declining voter share tends to affect the older, more established parts of this region. These areas tend to have better public transport connectivity, greater housing choice and lower rental costs. The high growth new development areas are expected to maintain a more stable voter share to 2029. The growth areas, in particular, are expected to maintain a strong correlation between overall ERP growth and voter growth.

4.8 Blue Mountains and Fringe Western Sydney

There is a strong contrast between the growth trends in the Blue Mountains and areas in and around Penrith. There is expected to be substantial growth in new greenfield areas to the north and most notably to the south of the Great Western Highway corridor. By contrast, many areas in the Lower Blue Mountains are decreasing in voters and only moderate increases in voters are expected in the Upper Blue Mountains.

The greatest increase between 2019 and 2029 by SA2 in this region is forecast for the Mulgoa - Luddenham - Orchard Hills SA2 with almost 5,000 extra voters. The Penrith SA2 is forecast to increase by more than 4,000 voters and the Kingswood-Werrington SA2 by about 3,800 over the same period.

The level of voter growth in the Mulgoa - Luddenham - Orchard Hills SA2 is likely to depend on the rate of development of the Badgerys Creek Airport which is in its infancy at present. The rate of residential development may accelerate in the surrounding areas if the Airport meets or exceeds its development timelines.

While most areas in this region are likely to grow as a result of greenfield residential development, areas around the transit hubs in Penrith and St Mary's will grow through greater residential densities, both medium and high. Areas that have finished their residential grow cycle and have a

maturing population are likely to decrease in population. These SA2s include those in the Lower Blue Mountains, as well as St Clair, Jamisontown - South Penrith and Cambridge Park. See Figure 17 below.

Figure 17: Voter growth by SA2, Blue Mountains and Fringe Western Sydney, 2019-2029
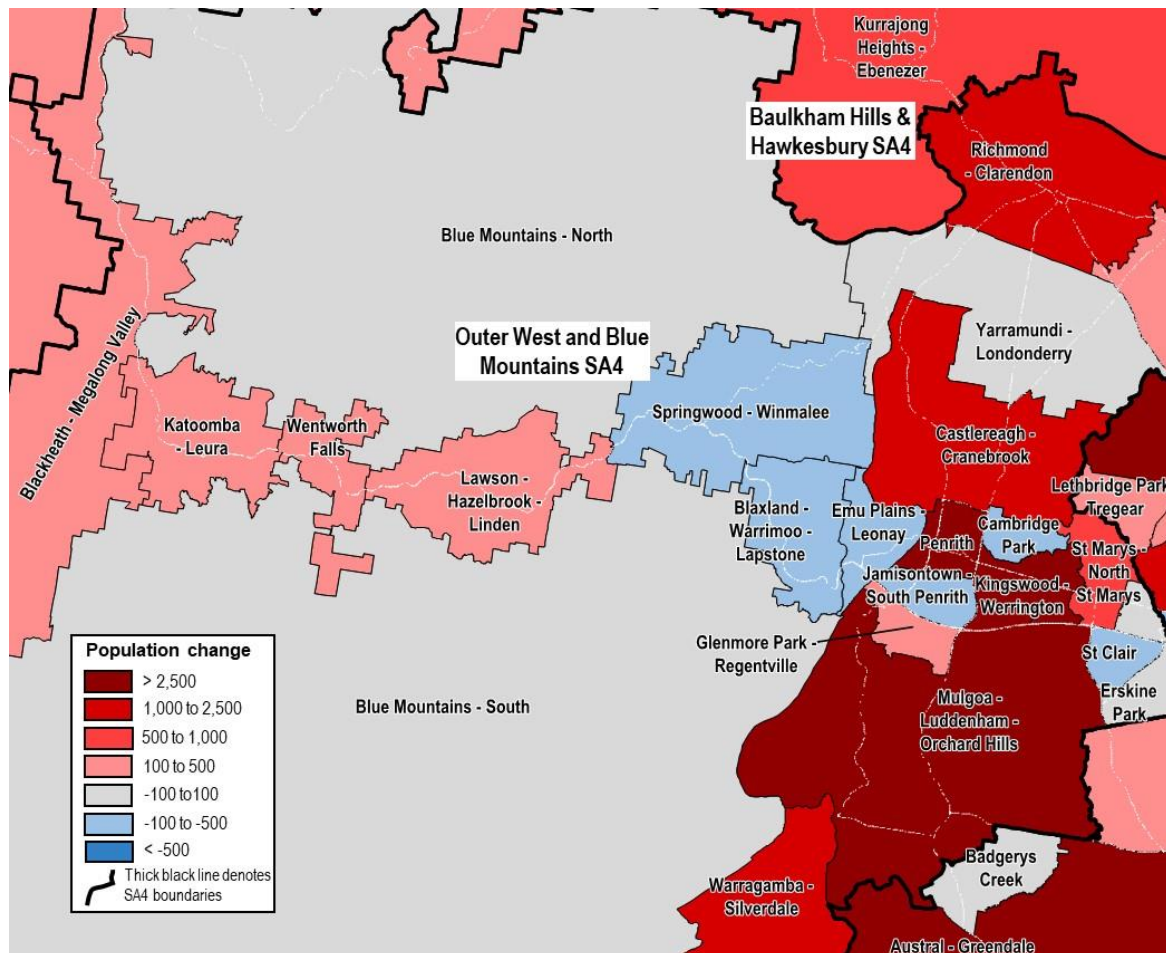
Source: id, SAFi; NSWEC, Voter data

There is a strong correlation between overall ERP growth and voter growth, with SA2s in Blue Mountains - Fringe Western Sydney boasting high voter shares. The SA2 with the lowest voter share in 2019 was Yarramundi - Londonderry at 78.1%. This is due to the presence of the John Moroney and Dillwynia Correctional Centres, with population included in ERP, but not as voters. Other areas with low voter share include Kingswood - Werrington, St Marys - North St Marys, Lethbridge Park - Tregear and Penrith.

Most part of this region are expected to retain a high voter share. The main exceptions to this trend are areas on the western side of the Nepean River, such as the SA2s of Blaxland - Warrimoo - Lapstone and Emu Plains - Leonay.

5. Voter growth in Regional NSW: 2019-2029

This section details the forecast voter growth in Regional NSW by SA2. This level of geography is comparable to a locality or suburb or aggregate of these areas.

5.1 Newcastle and Lake Macquarie Region

There is voter growth forecast for all areas in the Newcastle and Lake Macquarie Region from 2019-2029, except for the Belmont South - Blacksmiths and Newcastle Port areas. The largest gains between 2019 and 2029 are expected in areas on the edge of the city in the Morriset - Cooranbong (+4,130 voters) and Kurri Kurri - Abermain SA2s (+2,700 voters), as well as in the centre of Newcastle (Newcastle - Cooks Hill SA2, +2,530 voters). The main greenfield growth areas of the city over the last 10 years (Fletcher, Cameron Park and Medowie) will grow to 2029, but the existing land capacity is falling, meaning that voter growth will drop over time.

The pattern of voter growth in the Newcastle and Lake Macquarie regions to 2029 is a continuation of recent trends in the Hunter Region. While there is still a strong amount of voter growth in established parts of Newcastle, the focus of growth is moving away from Newcastle into the surrounding areas, especially to the north of Maitland and around Cessnock, as well as to the south-west around Cooranbong.

There has been and will continue to be a lot of infill development in the suburbs of Newcastle. In some cases, this is due to small parcels of residual greenfield land being developed, while in others, houses on larger residential blocks are being replaced with units and townhouses. Closer to the centre of Newcastle, the bulk of voter growth is driven by higher density development, with apartments providing new housing opportunities in key centres such as Hamilton, Mayfield and Wickham.

Areas to the south of the Newcastle around Lake Macquarie are expected to grow at lower rates. Many of these areas have completed their residential development cycles, but have some opportunity for infill development. In addition, some of these areas have higher vacancy rates, consistent with the many holiday rentals in the area and it is expected that some of these dwellings will convert to being occupied by permanent residents over time, providing further impetus for voter growth to 2029. See Figure 18 below.

Figure 18: Voter growth by SA2, Newcastle and Lake Macquarie Region, 2019-2029
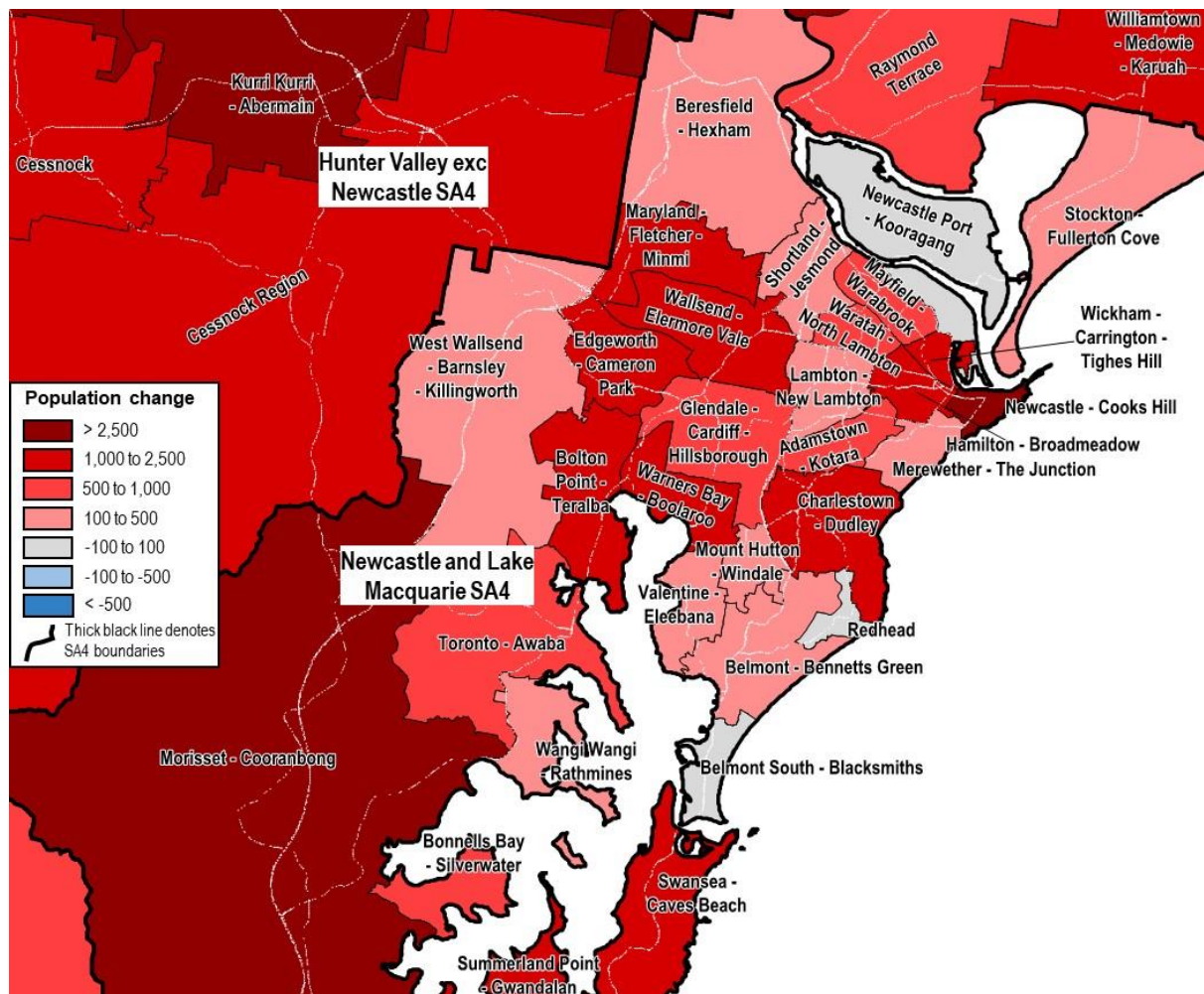
Source: id, SAFi; NSWEC, Voter data

There is a strong correlation between overall ERP growth and voter growth, with SA2s in and around Newcastle boasting high voter shares. The SA2 with the lowest voter share in 2019 was Shortland - Jesmond at 62.7%. This is due to the University of Newcastle campus, with a significant share of overseas students. Neighbouring areas to Shortland - Jesmond also have lower voter shares, as well as Newcastle - Cooks Hills.

Most parts of Newcastle are expected to maintain or increase the voter share, although the areas around the University of Newcastle are expected to decrease in line with more overseas students. This seems to be consistent with the trends in much of Regional NSW, where the shares of the adult population as citizens is stable or increasing. This may relate to more Australian citizens migrating north out of Sydney and the Central Coast, with the main attraction to overseas migrants being the University.

5.2 Upper Hunter and Lower Mid North Coast Region

This region focuses on voter change in the areas immediately north of Newcastle. All areas, except Wingham are likely to increase in voters, with commuter areas on the fringe of Newcastle likely to experience the highest gains. The areas around Maitland, in particular, are expected to have substantial increases to 2029, with the Maitland West SA2 forecast to increase by more than 4,600 voters, Branxton - Greta - Pokolbin SA2 forecast to increase by about 3,900 voters and Thornton - Millers Forest forecast to increase by just on 3,650 voters.

Areas to the north and south of Port Stephens are also within the Newcastle commuter belt, with large new greenfield subdivisions planned in Tea Gardens, Medowie, as well as medium and high density living in and around Nelson Bay. This area and those further along the Coast (such as those near Taree) are very attractive areas for retirees and much voter growth in these areas will be driven by older adults and those who will service this ageing population. See Figure 19 below.

**Figure 19: Voter growth by SA2, Hunter Valley and Lower Mid North Coast, 2019-2029**
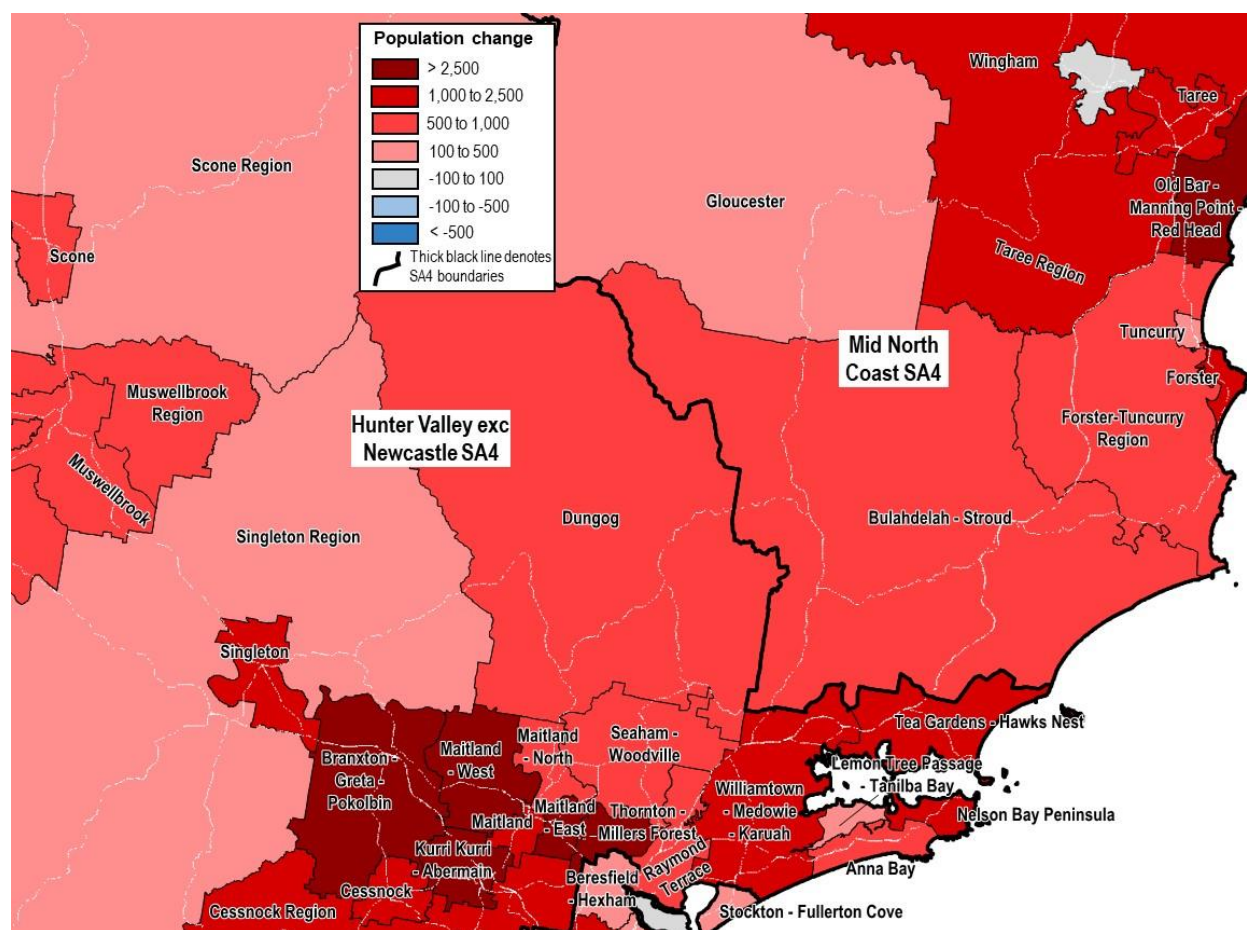
Source: id, SAFi; NSWEC, Voter data

All areas within the region have high voter share (90+%), with the lowest rate in Cessnock SA2 at 88%. This means that the trends in voters is very similar to the assumed underlying growth in ERP from the SAFi data.

5.3 New England and Mid North Coast

Voter change in the inland areas of the north west of NSW follows the pattern of gain in and around major centres, with stagnant population or declining numbers in the rural areas. Tamworth is the major growth centre for the inland areas, with gains in all three urban SA2s, as well as in new urban and rural residential areas surrounding the city in the Tamworth Region SA2. Armidale, Inverell and Gunnedah are also expected to grow to 2029, albeit at lower rates than in Tamworth. The SA2s with smaller populations are generally expected to have stable voter populations, although the further west, the more likely that voter populations will decrease. See Figure 20 below.

Figure 20: Voter growth by SA2, New England and Mid North Coast, 2019-2029
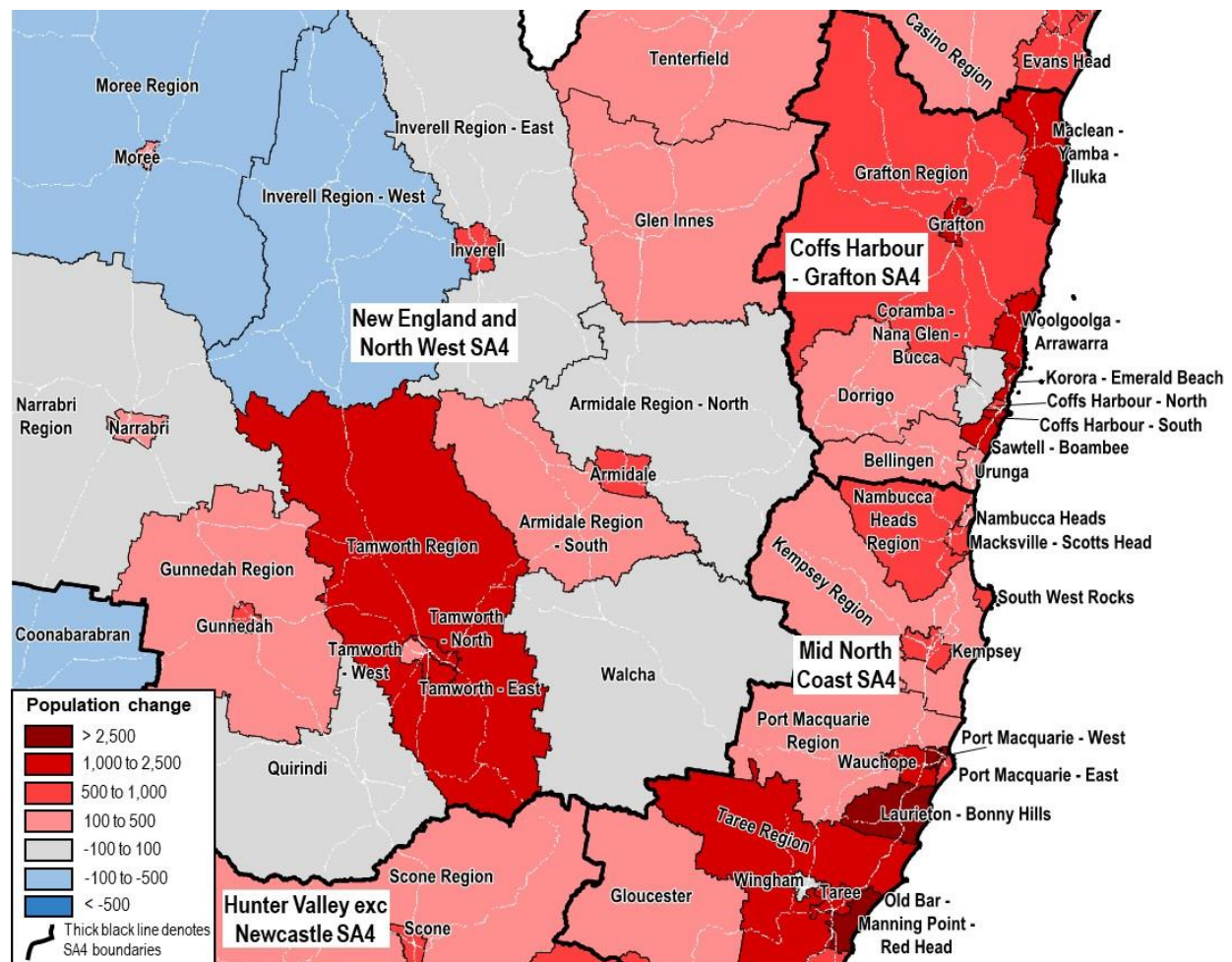
Source: id, SAFi; NSWEC, Voter data

Most coastal areas are expected to grow in voter numbers. The growth is driven by a combination of retirees and families, many of whom have moved from Sydney. This is a continuation of past trends, although the rate of growth has fallen in recent decades. The largest gains are forecast in the SA2s of Old Bar - Manning Point -Red Head, Laurieton - Bonny Hills and Port Macquarie - West. There is also a high rate of gain in most parts of greater Coffs Harbour, from Woolgoolga to Sawtell, as well as around in the rural hinterland of Port Macquarie and Taree. In the north of the region, growth is forecast to be highest in Maclean - Yamba - Iluka and Grafton.

Most areas in the region have a high voter share and therefore there is a close connection between forecast gain in adult population and voters. These shares are forecast to remain high in most areas, although a decrease is forecast in areas around Armidale, due to the University of New England, as well as Coffs Harbour, due to overseas persons working in the agricultural and horticultural industries.

5.4 Richmond-Tweed Region

The Richmond-Tweed Region is located adjacent to the Queensland border. Much of the northern part of the region, especially Tweed Heads and surrounds is heavily connected to the Gold Coast. The largest amount of voter growth expected in the region is in the Tweed Heads SA2, with much greenfield growth potential in the Cobaki area. The growth in Tweed Heads has been relatively low in the past decade, relative to previous development rates. The Cobaki area is directly adjacent to the Queensland border and it is expected that many Queenslanders will take the opportunity to buy in the area, as greenfield opportunities in the Gold Coast continue to diminish. Tweed Heads also has significant high-density potential, with large numbers of apartments planned for central areas in and around the main commercial area.

In the greater Tweed Heads area, there is also substantial further voter growth forecast for the Pottsville SA2, with the build-out of the Casuarina area. For much of the rest of the region, there is a relatively consistent growth outlook, with all areas expected to increase and the largest gains expected along the coast and in the larger inland centres such as Lismore and Casino. Goonellabah remains one of the principal fronts for new urban development in Lismore and the voter gains in this SA2 to 2029 are consistent with this role. See Figure 21 below.

Figure 21: Voter growth by SA2, Richmond-Tweed Region, 2019-2029
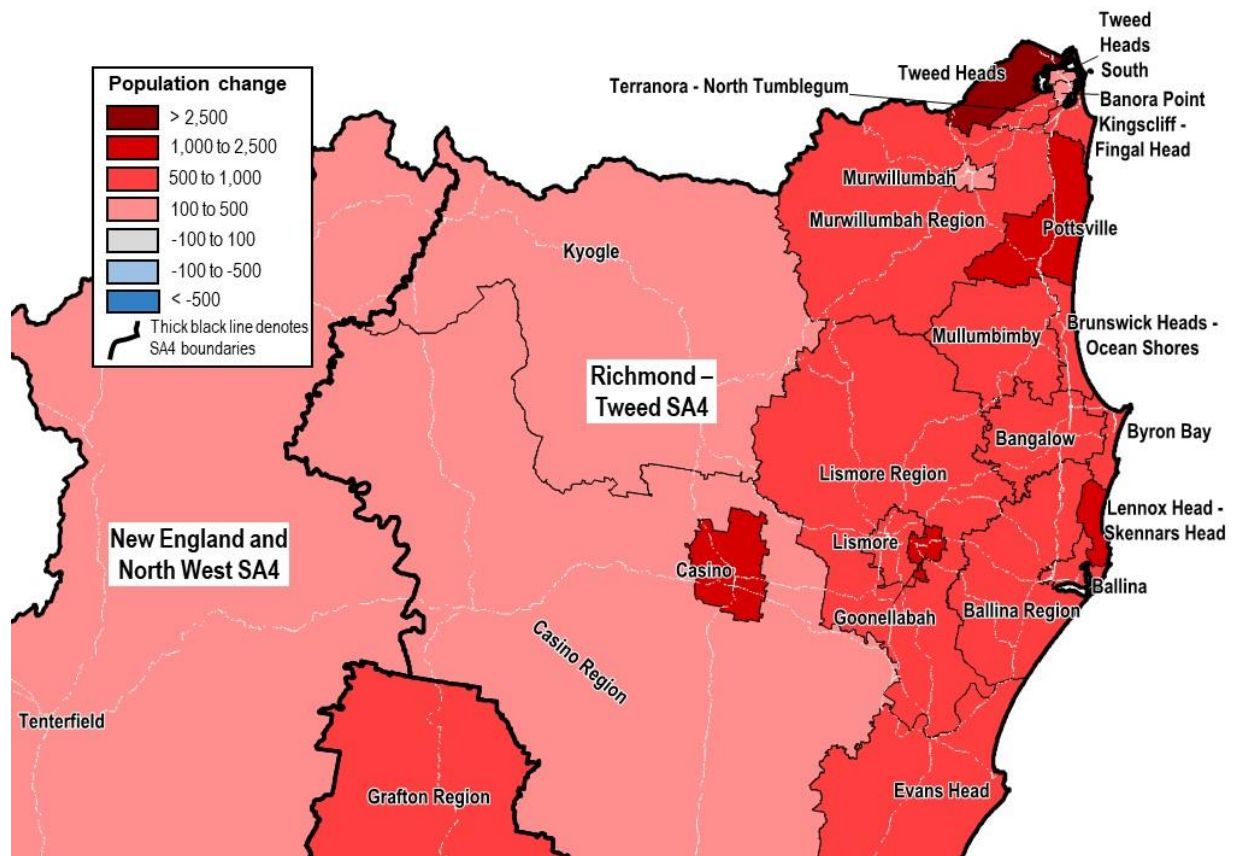
Source: id, SAFi; NSWEC, Voter data

In terms of voter share, most SA2s in the region are between 90% and 100% of the adult population. Only Byron Bay and Kingscliff - Fingal Head have lower voter shares at 87% and 85% respectively in 2019. The trend in voter share at the SA2 level is forecast to be similar to that of the region, with most areas remaining stable or increasing the voter share between 2019 and 2029.

5.5 Western Regional NSW

This region covers a vast area from the edge of Sydney and the Hunter Region to the State border with Queensland and South Australia in the north and west to the Riverina in the south. It contains many major inland regional centres including Orange, Dubbo and Bathurst, as well as secondary centres including Griffith, Lithgow, Mudgee, Parkes, Forbes and Cowra.

Most of the voter growth is expected around the Central West to 2029, with the most significant gains forecast for Orange and Bathurst SA2s. There is also expected to be strong rates of increase in Dubbo and surrounds, as well as Parkes and Mudgee. In many of these areas, there is growth in the rural hinterland with many persons choosing a rural residential lifestyle on the edge of town, rather

than in suburban estates. Wellington and Coonabarabran SA2s are exceptions to this pattern. In the southern part of this vast region, voter growth is likely to be greatest in and around Yass (Yass and Murrumbateman) and in Goulburn, due to 'overspill' growth from Canberra. Some growth in voters is forecast for the larger centres in the west of the region, such as Griffith and Leeton. Generally, however, the further west and south, the greater the loss in voter population. Forbes, Temora, Narrandera and West Wyalong SA2s are all expected to decrease in voter population, which is a continuation of historical trends. See Figure 22 below.

Figure 22: Voter growth by SA2, Western NSW, 2019-2029
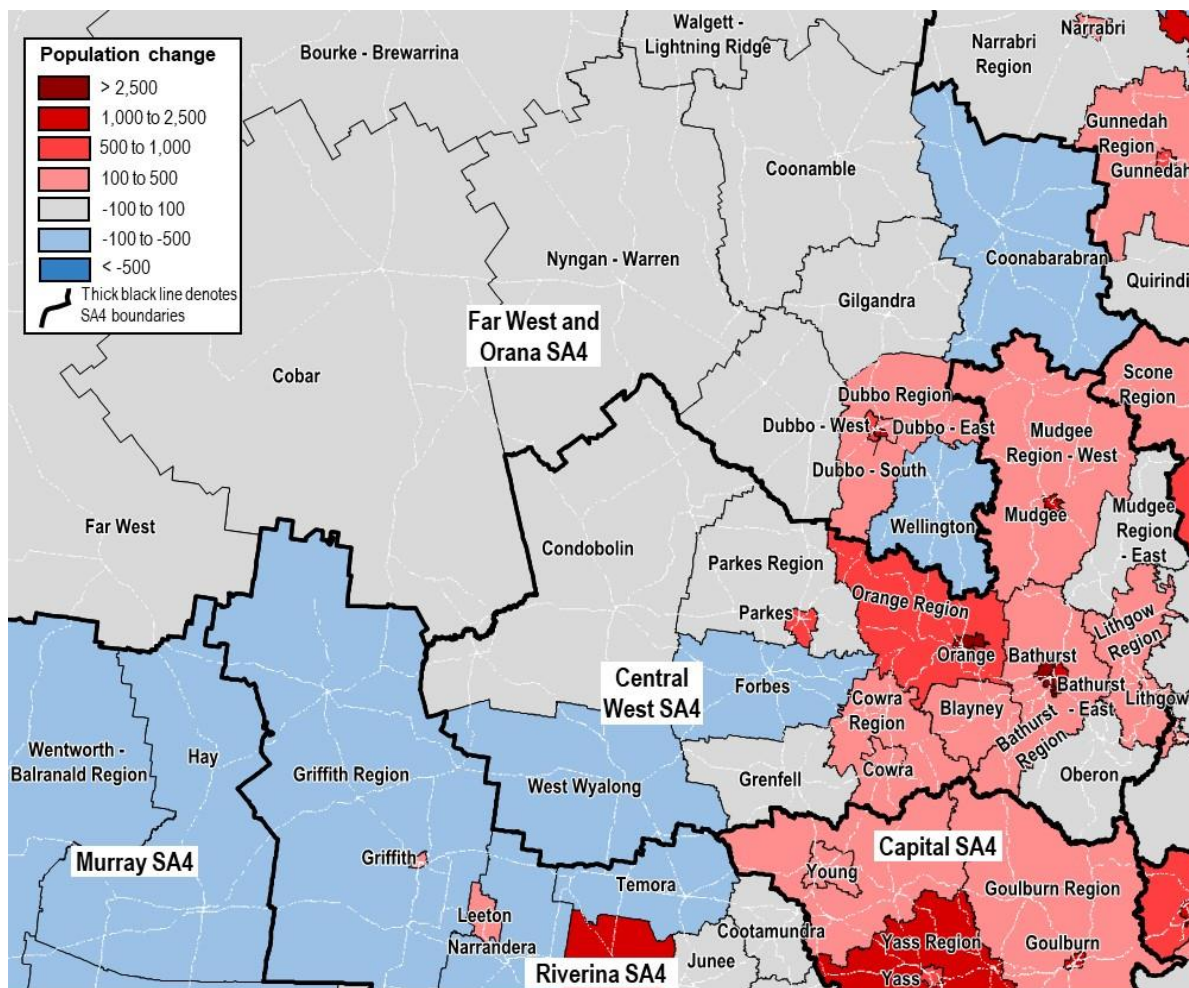
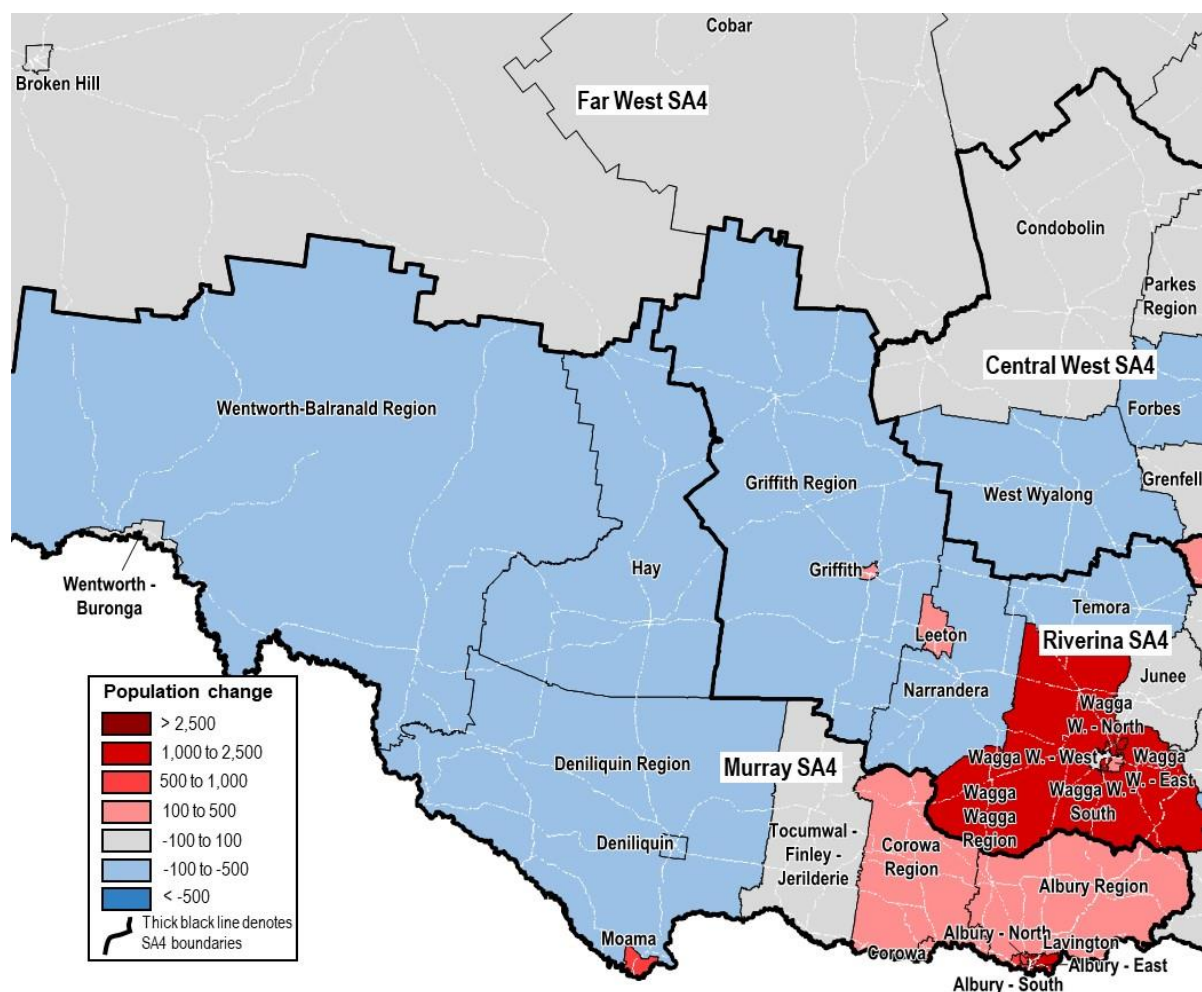*Source: id, SAFi; NSWEC, Voter data*

Many of the areas in the northern Riverina are forecast to have a decreasing voter share. This is because of the increased presence of overseas farm workers and labourers. This creates a variation in growth trends between adult population and voters. The rest of the region is expected to remain at high (+90%) voter share. It is interesting that the out-migration to the major centres of Bathurst and Orange from Sydney is expected to offset the gain from overseas migrants and these SA2s are not expected to decrease in voter share from 2019 to 2029.

5.6 Riverina and Murray Regions

This region covers the far west and south-west of the State and includes Albury, Wagga Wagga and Broken Hill. Voter growth is expected to be centred around Wagga Wagga and Albury, with some gains expected in Moama and Corowa. Most rural areas are expected to decrease in line with historical trends. As noted in the previous section, some areas along the Murray and in the Riverina may be affected by an increased presence of overseas farm workers and labourers. This creates a variation in growth trends between adult population and voters, with a declining voter share.

However, except for Albury and Corowa, the larger population centres along the Murray are on the Victorian side (Mildura, Robinvale, Swan Hill and Echuca). This means that the population of some rural areas in NSW along the Murray River gravitate towards Victorian centres, which re-iterates voter loss in NSW. Moama benefits from being a residential growth area for the Echuca-Moama urban centre. See Figure 23 below.

**Figure 23: Voter growth by SA2, Riverina and Murray Regions, 2019-2029**

Source: id, SAFi; NSWEC, Voter data

The primacy of Wagga Wagga and Albury in this region can be seen in Figure 23. Almost all SA2s covering these cities have growth and there is substantial growth in the hinterland of Wagga Wagga. Corowa, Leeton and Griffith are also expected to experience some increase in voters to 2029. However, Broken Hill and Deniliquin's voter population are expected to stagnate and fall respectively between 2019 and 2029.

5.7 Capital and South Coast Region

The voter growth in the Capital and South Coast Region is focused in areas abutting Canberra and along the coast. The largest gain of voters by SA2 from 2019 to 2029 is expected in Ulladulla and the Queanbeyan Region, followed by Yass Region, Narooma - Bermagui and Batemans Bay - South. Population growth along the South Coast has stagnated in recent years, although the demand for coastal living remains high. Voter growth in areas on the edge of Canberra, such as Googong and Murrumbateman, has increased markedly and is expected to continue to 2029. See Figure 24 below.

Figure 24: Voter growth by SA2, Capital Region and South Coast, 2019-2029
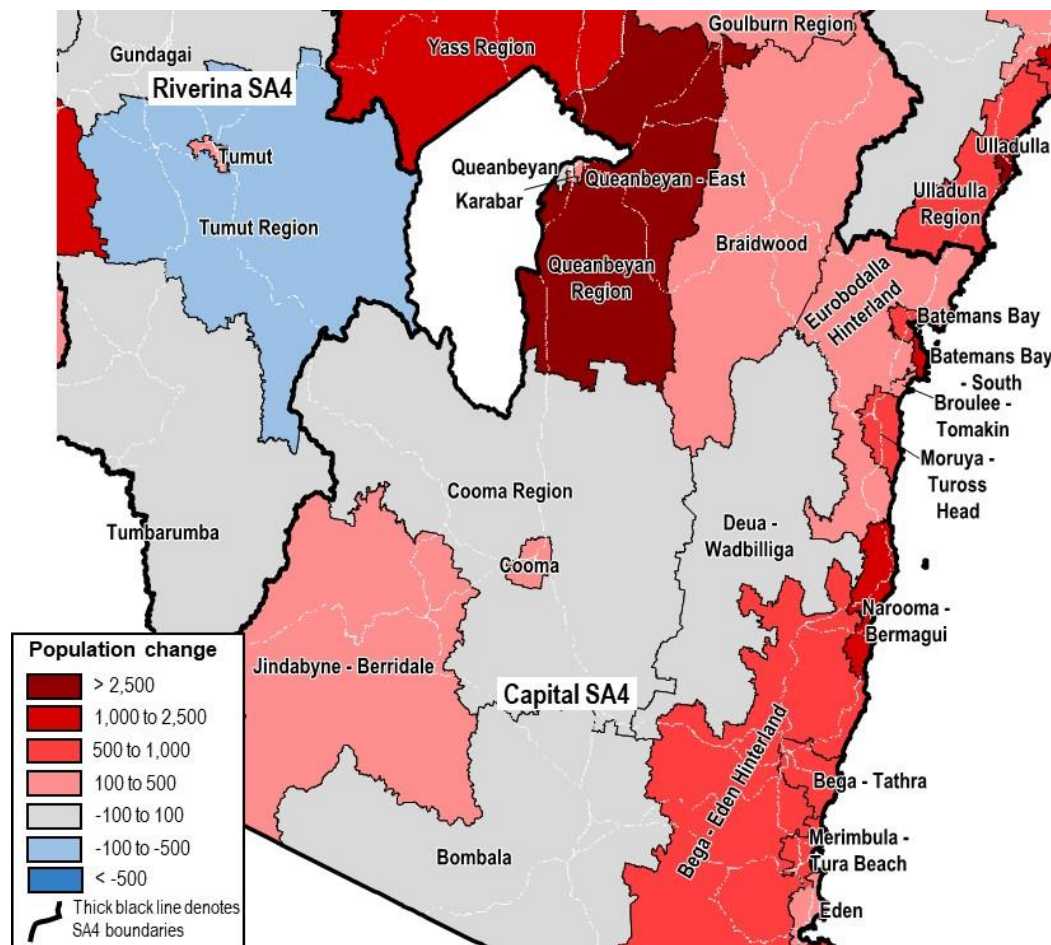
Source: id, SAFi; NSWEC, Voter data

Many of the inland rural areas are not expected to experience much growth in the period to 2029, with the Tumut Region SA2 likely to experience the greatest drop in voters. The Tumut, Cooma and Jindabyne - Berridale SA2s are expected to increase moderately, but the gain is small compared to coastal growth. The urban Queanbeyan SA2s are not likely to increase notably, with the growth centred in the Googong area to the south. In the case of the Queanbeyan SA2, it is also partly due to the decreasing voter share in the area.

5.8   Illawarra, Southern Highlands and Shoalhaven Regions

There is voter growth forecast in many areas of the Illawarra, Southern Highlands and Shoalhaven Regions from 2019-2029. The largest gains between 2019 and 2029 are expected in areas on the south-western edge of Wollongong in the Albion Park - Macquarie Pass (+4,940 voters), Horsley - Kembla Grange (+4,310 voters) and Dapto - Avondale SA2s (+3,300 voters). These areas generally cover the West Dapto Urban Release Area and the Calderwood Valley-Tullimbar area, which are the main greenfield growth areas for the Illawarra.

Many of the SA2s in the Wollongong urban area are expected to decrease in voters. This is particularly true of the areas along the Illawarra Escarpment, most of which have mature populations and decreasing voter share. The potential for greater residential densities in these areas is comparatively limited. The northern suburbs of Wollongong, especially the Woonona - Bulli - Russell Vale SA2, are expected to increase in voters, due to some minor greenfield development and more unit development. Areas to the south of Wollongong (Windang - Primbee and Warilla) are generally forecast to have stable voter populations. The continued increase in density through apartment and unit construction in the centre of Wollongong and Shellharbour is forecast to result in strong voter growth in these areas.

There is forecast growth throughout much of the Southern Highlands region, with the largest gain in voters between 2019 and 2029 expected to be in the SA2s of Mittagong and Moss Vale - Berrima. There has been consistent growth over decades in these areas due to the attractiveness of a semi-rural lifestyle, but still on the fringe of the Sydney Metropolitan Area. There are limited areas of greenfield development in the Southern Highlands, with the largest areas in Renwick, the eastern edge of Bowral and the southern edge of Mittagong

There are similar patterns of moderate to strong voter growth throughout the Shoalhaven region, with the largest amount of growth in voters to 2029, expected in the Nowra and the St Georges Basin - Erowal SA2s. The growth rates in areas south from Kiama to Ulladulla are similar to the

trends seen on the Mid-North Coast, although the number of large centres south of Wollongong is limited, with Nowra being the largest commercial hub. The opportunities for large-scale greenfield development in these areas have reduced over time, with the bulk of growth coming from utilising vacant lots and increased densities in existing urban areas. Nowra itself has several development fronts, although there is a strong preference for coastal land. See Figure 25 below.

Figure 25: Voter growth by SA2, Illawarra, Southern Highlands and Shoalhaven, 2019-2029
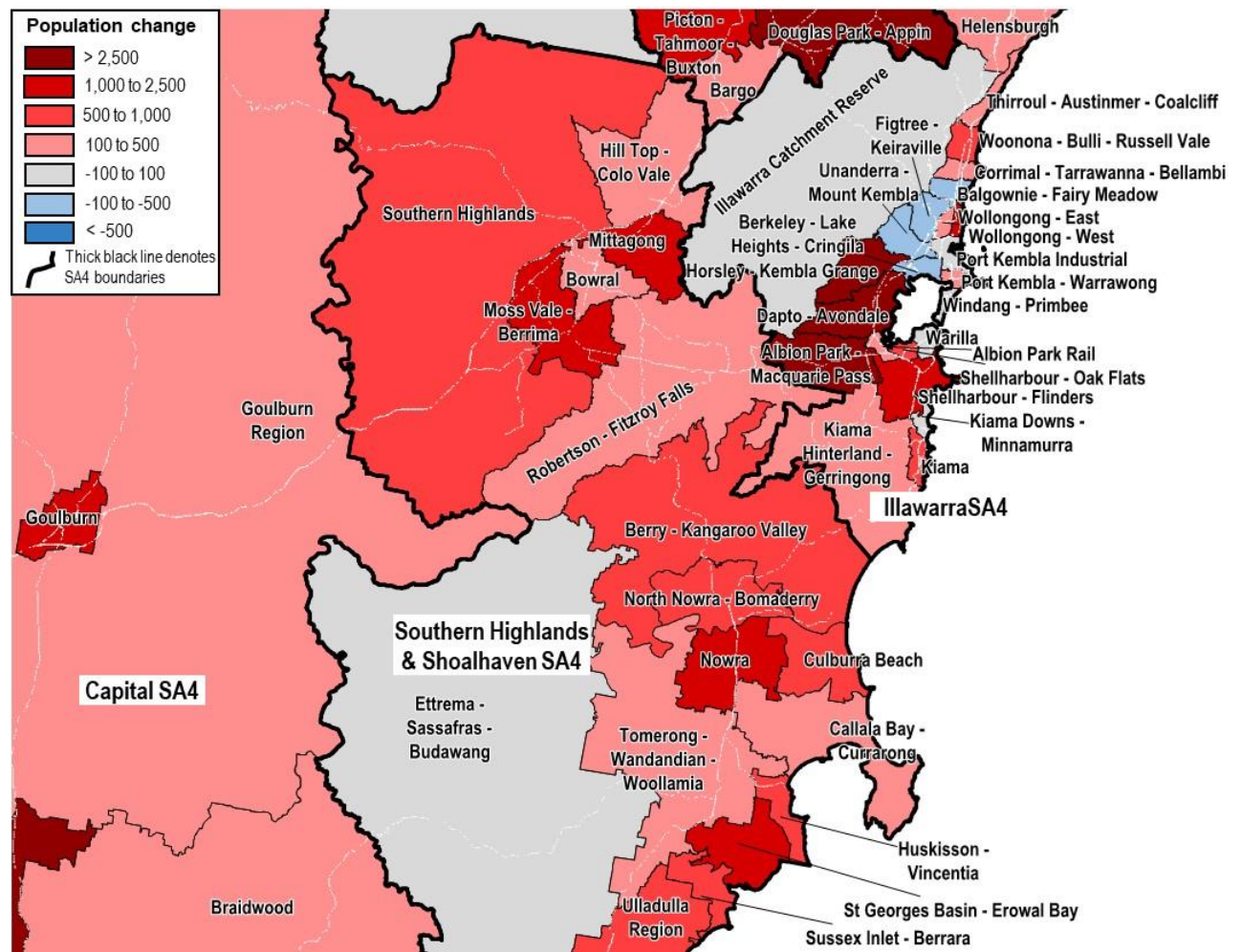
Source: id, SAFi; NSWEC, Voter data

Most parts of this region are expected to maintain or increase the voter share. The main exception to this pattern is in the western and inner northern suburbs of Wollongong. This is due to the impact of the University of Wollongong, with its two campuses at Keiraville and North Wollongong. It is expected to attract more overseas students and hence reduce voter share in these areas.

Glossary

Greenfield development - land development characterised by conversion of predominantly rural land use to residential purposes. This type of development is characterised by lower densities, with a higher share of single-lot housing stock.

Medium-density housing – housing comprised of units, townhouses and low-rise apartments

High-density housing - multi-storey apartment blocks, usually in clusters

Infill development - small scale housing development, usually comprised of units, townhouses and low-rise apartments.

Locality - A gazetted area usually in regional or rural areas equivalent to a suburb in an urban area

SAFi - .id' s detailed local area population and household forecasts.

Vacancy rate - the share of dwellings vacant (no permanent household in residence).

Voter share - the percentage of the adult population (18 and over) as voters.