



mccrindle

Yuroke Demographic Analysis

Holy Apostolic Catholic Assyrian
Church of the East

May 2021

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Contents

Methodology	4
Research objective	4
Defining the area of analysis	4
Use of demographic data	6
Executive summary	7
Demographic analysis	10
Population	10
Age profile	18
Education affiliation	23
Family composition	26
Income	28
Qualification and employment	31
Cultural composition	33
Population projection	39

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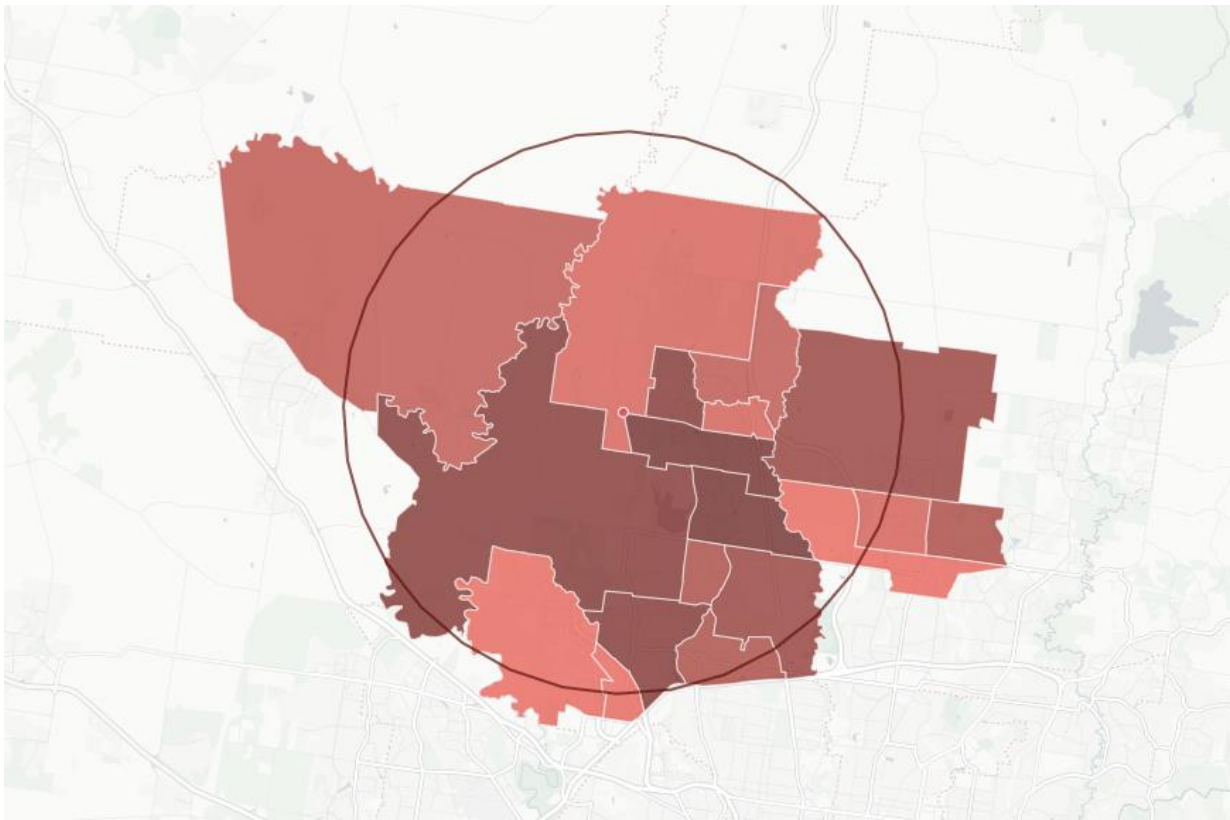
Methodology

Research objective

The purpose of this report is to investigate the Yuroke development site of the Holy Apostolic Catholic Assyrian Church of the East. This report analyses the social, economic, and demographic changes occurring in the area, and how these changes will impact the development.

Defining the area of analysis

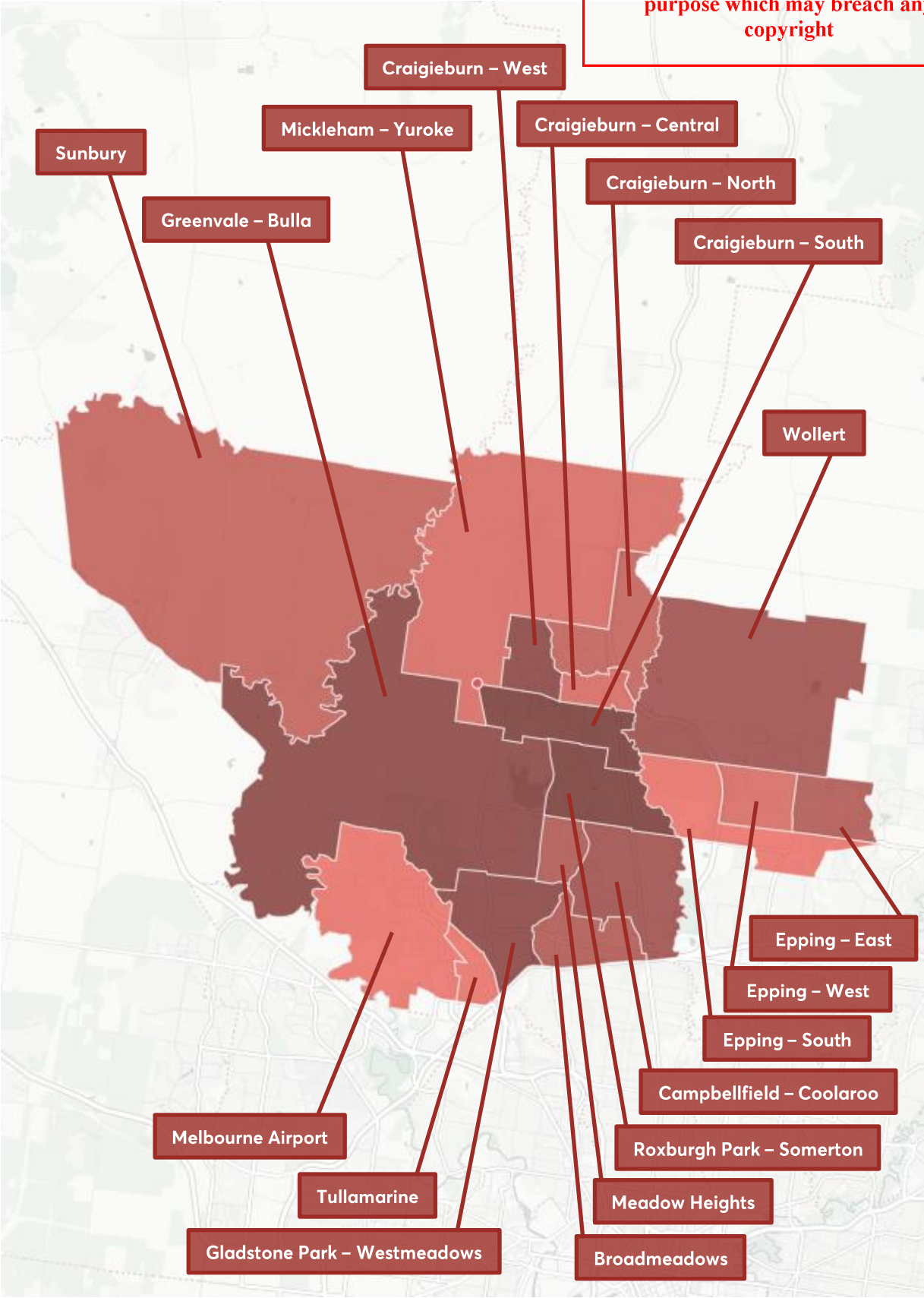
For the purpose of this report, the catchment area of the development has been defined as a collection of 18 Statistical Areas Level 2 (SA2s) which fall within a 12km radius of the site. The map below displays the geographical boundaries of catchment area.



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Catchment area



Use of demographic data

Statistical areas

Multiple geographical areas are used in this report. These include Statistical Areas Level 2, Statistical Areas Level 4, Greater Capital City Statistical Areas, and state and territories.

Statistical Areas: Data in this report has been collected based on Statistical Areas Level 2 (SA2s) and Level 4 (SA4s). SA2s are designed by the Australian Bureau of Statistics (ABS) to be general purpose areas that represent communities that interact together socially and economically.

There are 2,310 SA2 regions covering the whole of Australia without gaps or overlaps. SA2s are designed as the primary output region for the release of non-Census and Intercensal data, they generally have a population range of 3,000 to 25,000 persons.

SA4s are the largest sub-state regions in the Main Structure of the Australian Statistical Geography Standard (ASGS). They have been designed for the output of a variety of regional data.

Capital cities: Data relating to Melbourne is collected using the Melbourne Greater Capital City Statistical Area (GCCSA). GCCSAs are geographical areas defined by the Australian Bureau of Statistics. These areas have been specifically designed to represent the functional extent of each capital city in Australia.

Demographic data

Demographic data used in this report is obtained from the Australian Bureau of Statistics' Census of Population and Housing 2006, 2011 and 2016, as well as *National, state and territory population*, *Regional internal migration estimates*, and *Regional population by age and sex*.

Population projections

Future population projections for the catchment area are from the Victoria Government's Department of Environment, Land, Water and Planning (DELWP): *Victoria in Future 2019*.

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Executive summary

A catchment in the centre of Melbourne's expanding north west

As Australia's largest growing capital city, Melbourne has added more than a million residents over the past decade (1,046,406). Regions such as the west (43%) and the north west (31%) have been particularly fast growing. The Yuroke development site of the Holy Apostolic Catholic Assyrian Church of the East is in the centre of the fast growing north west.

Within 12km of the site are 18 growing areas which form the catchment area of the development.

Over the past decade, the population in the catchment area has been growing at a rate of 53%, more than doubling the average across Melbourne (26%). As a result of this fast growth, the catchment has increased in population to 1.5 times its size over the past ten years.

This growth has been equally driven by all three components of population growth (natural increase, net internal migration, net overseas migration).

Since 2017, natural increase (births minus deaths) has accounted for 29% of the catchment's growth. Over the same period, net internal migration (movement within Australia) and net overseas migration (movement outside of Australia) have accounted for 35% and 37% of growth respectively. As such, COVID-19 is not likely to impact the growth trajectory of the catchment in a major way.

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A young age distribution with the influx of young people and family-formers

The combined median age of the catchment is 34 years old, which is younger than the Melbourne (36) and state median (37). This indicates an overall young age distribution. For the catchment, this is a result of the high proportion of young people.

Almost 29% of the catchment are under the age of 20, and a further 32% are in their young adulthood and family-forming stages of life (aged 25 to 44).

Over the past decade, there has also been an influx of young people and family-formers in the catchment. Proportionally, almost two-thirds of the fast growth in population over the past decade are under 20s (27%) or family-formers (37%).

A 31% increase in students, with the independent sector leading the growth

A direct result of the growth in young people, the number of students in the catchment has been increasing at a ten-year rate of 31% over the past decade.

This growth, however, is not uniform across the education sectors. The independent sector (72%) has been growing almost three times as fast as the government (25%) and the Catholic sector (27%). This has led to the increase in the independent sector's share of students (12% in 2006 cf. 15% in 2016) and the decline in both the government (65% cf. 62%) and Catholic sector (24% cf. 23%).

Across the catchments, areas with a higher-than-average level of independent affiliation (16% Melbourne average) are also almost all growing areas of young people or existing large population centres, highlighting key opportunities for the development.

Growing cultural and linguistic diversity

With the growing population in the catchment, communities are also increasingly culturally diverse. More than two in five residents were born overseas (42%) and more than one in two speak a language other than English when at home (54%). India (6%), Iraq (5%), and Turkey (3%) are the most common migrant countries of birth and Arabic (9%), Turkish (6%), and Punjabi (4%) are the most common non-English languages spoken in the catchment. A further testament to the catchment's growing cultural and linguistic diversity, over the past decade, the number of residents who were born overseas have been increasing at three times the rate of those who were born in Australia (83% cf. 27%). Similarly, those who speak a language other than English when at home have been increasing at five times the rate of those who speak only English (83% cf. 17%).

A large proportion of the catchment's high cultural diversity are those who are a part of the Assyrian community.

Connected to a number of countries, languages, and religions, more than 30,000 residents in the catchment are from countries connected to the Assyrian community (Iraq, Turkey, Lebanon, Syria, Iran, Egypt, Jordan, Armenia). This accounts for 12% of the catchment's total population or 31% of the catchment's migrant population. Chaldean Neo-Aramaic and Assyrian Neo-Aramaic are also spoken by more almost 8,000 and 7,000 catchment residents respectively. A further 8,000 also identify as Assyrian Christian (Chaldean Catholic, Assyrian Church of the East, Syrian Orthodox Church, Coptic Orthodox Church, Ancient Church of the East, Assyrian Apostolic, nfd).

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More than 420,000 residents by 2036

Based on projections of the Victorian Government, more than 420,000 people will reside in the catchment area by 2036, an increase of more than 163,000 from the current population of 258,330. The fast historical growth is also projected to continue. Over the next decade, the catchment population is projected to increase at a rate of 35%, 1.8-times as fast as the projected Melbourne average (20%).

The proportion of young people is expected to remain similar (29% under 20 and 16% under 10 currently cf. 29% under 20 and 14% under 10 in 2036) while young adults and family-formers (aged 25 to 44) are projected to comprise a slightly smaller proportion of the overall population (32% current cf. 27% in 2036).

Conservatively assuming the catchment's enrolment ratio and independent sector's share of students to remain the same, which has historically been increasing (12% in 2006 cf. 15% in 2016), the catchment is projected to be home to 10,200 independent students by 2036, almost doubling in number over just 20 years (5,366 in 2016).

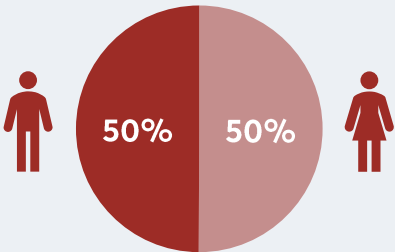
Population growth to surround the development site

At present, large areas by population are east of the development site in Craigieburn and south in Roxburgh Park – Somerton. By 2036, the fast-developing Wollert in the east is projected to be the largest area by population. Wollert's current population of 16,000 is projected to quadruple in size to 64,000 within the next two decades. Outside of Wollert, other populous areas are projected to be Mickleham – Yuroke (58,334), Greenvale – Bulla (35,127), Craigieburn – West (31,305), Craigieburn – South (28,747), Roxburgh Park – Somerton (28,527), and Sunbury (22,305), all of which are neighbouring areas to the developing site, positioning more than 200,000 residents within close proximity by 2036.

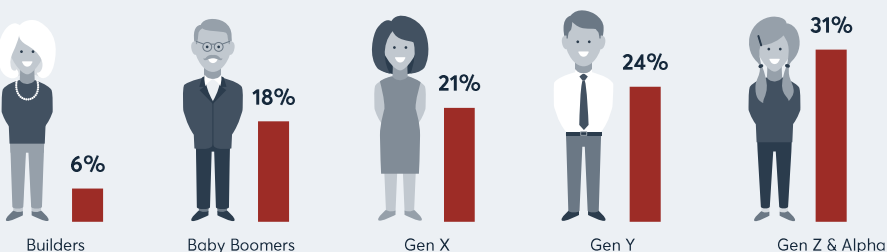
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Demographic Snapshot

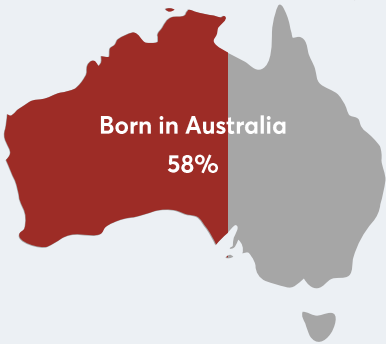
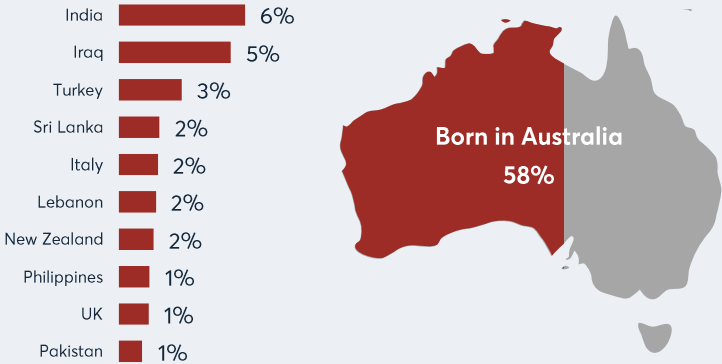
Gender composition



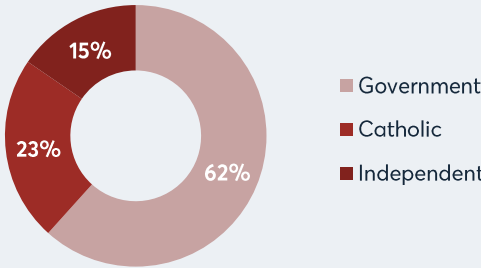
Generation composition



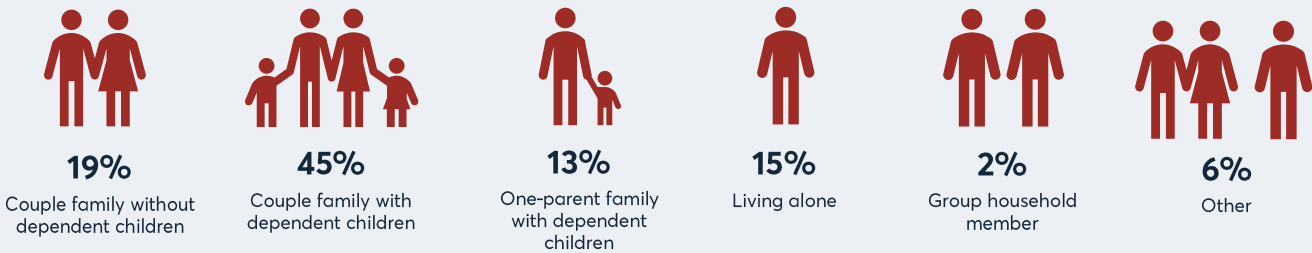
Top migrant countries of birth



Student enrolment by affiliation

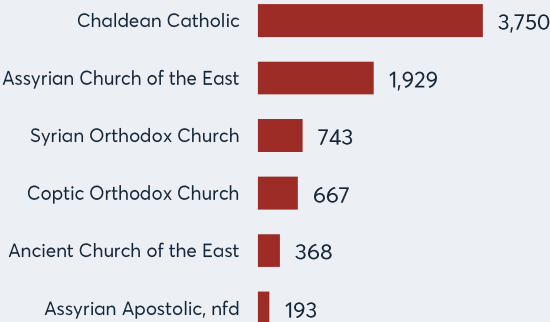


Household composition

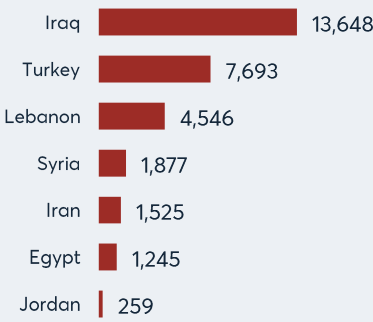


Estimated Assyrian population

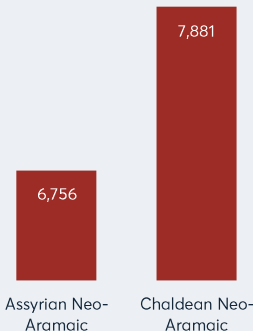
Religious affiliation



Country of birth



Language spoken



Demographic analysis

Population

Catchment in the heart of Melbourne’s expanding north west

Adding more than a million residents over the past decade (1,046,406), Melbourne is Australia’s largest growing capital city. With a current population of five million, it is projected that Melbourne will overtake Sydney as Australia’s most populous city as early as 2026-27 (5,672,700 Sydney cf. 5,693,900 Melbourne).¹

Melbourne’s population growth has also been particularly fast in a number of regions. In the inner city (Melbourne – Inner), population has been increasing at a rate of 35% over the past decade. The population in the west (43%) and the north west (31%) have also been growing at similar rates.

In the heart of the sprawling north west, the catchment area surrounding the development site of the Holy Apostolic Catholic Assyrian Church of the East has been experiencing significant growth. From a 2009 population of 168,300, the catchment has increased to 1.5 times its size over just ten years (258,330).

Catchment population growing twice as fast as the Melbourne average

Proportionally, the catchment has been increasing in population at a ten-year rate of 53%. This growth is more than double the Melbourne average over the same period (26%).

In fact, while the catchment’s population of 258,330 accounts for just 5% of Melbourne’s population, its growth over the past decade accounts for almost 9% of Melbourne’s growth.

This has also been accelerating.

In the five years between 2009 and 2014, the catchment’s population increased by 35,323 at a rate of 21%. In the subsequent five years (2014 to 2019), population growth has been both larger (54,705) and faster (27%).

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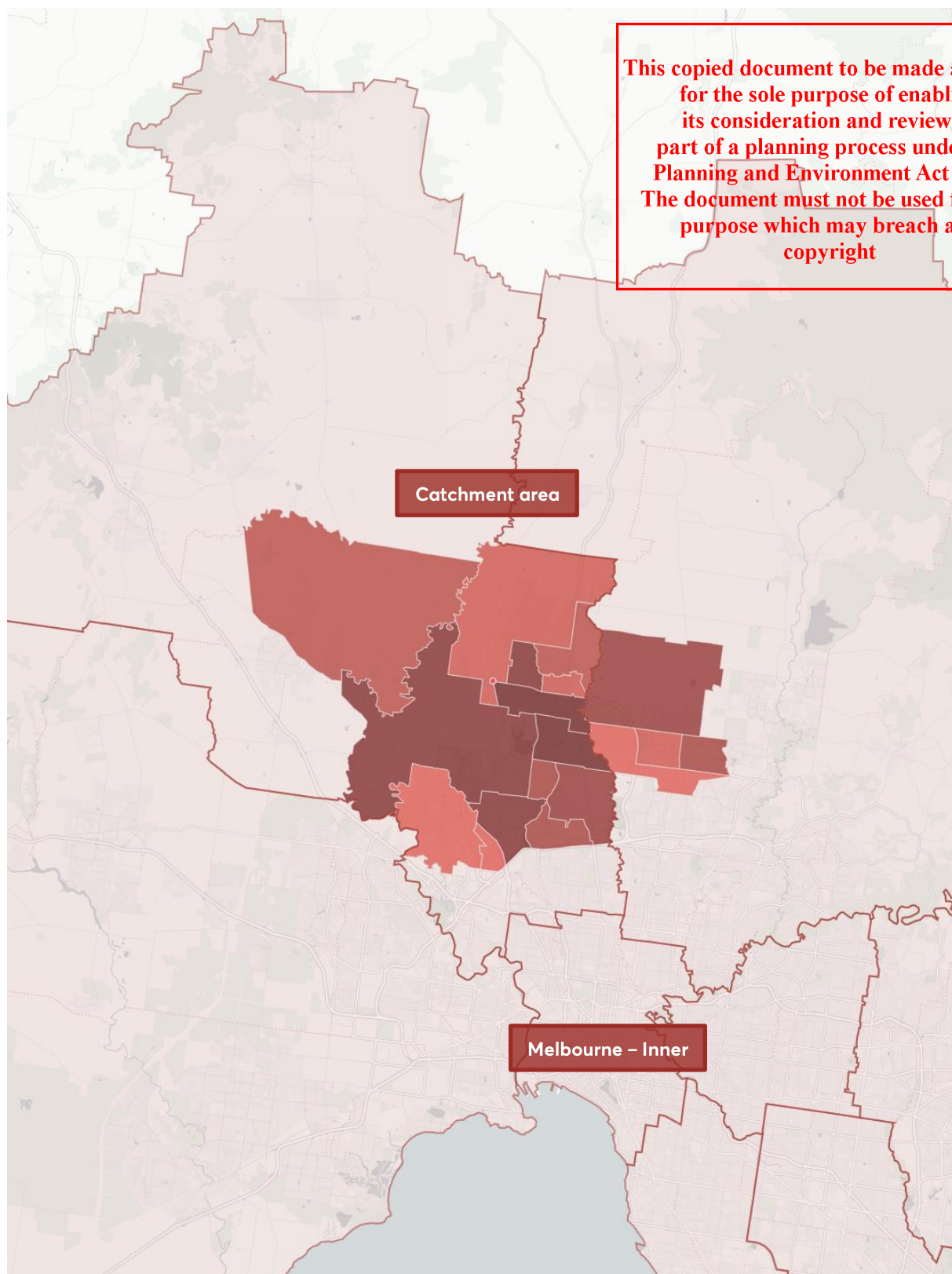
Population

	2009	2014	2019	# 09-19	% 09-19
Catchment area	168,302	203,625	258,330	90,028	53%
Melbourne	4,031,787	4,476,030	5,078,193	1,046,406	26%

¹ Centre for Population 2020, Population Statement, Australian Government.

Catchment in the centre of Melbourne's sprawling north west

Just over 20km from Melbourne CBD, the catchment area surrounding the Yuroke development site is in the centre of Melbourne's fast growing north west.



Strong drive through all components of population growth

The catchment’s accelerating growth can be attributed almost equally to all three components of population growth.

Natural change is the ambient change in population based solely on fertility (births) and mortality (deaths) within an area. Since 2017, this has accounted for 29% of the catchment’s population increase.

Net internal migration is the movement of people to and from areas within Australia, while net overseas migration is the movement of people to and from areas outside of Australia. For the catchment, net internal migration and net overseas migration respectively accounts for 35% and 37% of the catchment’s growth since 2017.

Numerically, this is a growth of 9,450 through natural increase, 11,578 through internal migration, and 12,099 through overseas migration over the past three years. The balanced growth through all three components highlights that the catchment’s accelerating growth is not single factorial. Rather, it is driven through all three components of growth.

As such, the demographic impact of COVID-19 on the overall growth of the catchment area is likely to be less severe.

Component of population growth

Component of population growth of the catchment, 2017 to 2019.

	Natural change <i>Births minus deaths</i>	Net internal migration <i>Internal arrivals minus departures</i>	Net overseas migration <i>Overseas arrivals minus departures</i>
2017	2,976	3,514	4,145
2018	3,320	3,932	4,020
2019	3,154	4,132	3,934

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Demographic impact of COVID-19

Impairment to net overseas migration

While the medium to long term demographic impact of COVID-19 is still lesser known, the notable short-term impact is the impairment of overseas migration. Subject to a number of factors, however, Australia's migration numbers could begin gradually rebounding. The commercial availability of a vaccine, the gradual recovery of the Australian and parts of the global economy, rising sentiment towards Australia's public health effort are all positive factors for Australia's net overseas migration rate in the future.

Furthermore, the 2020-21 Federal Budget outlines that the migration program planning level for next year has remained unchanged at 160,000. A one-off increase of Family Stream places from 47,700 to 77,300 has also been introduced. This signals the government's intention for migration to continue to be a strong component of growth for Australia.

Minimal impact to natural change

Undoubtedly a positive outcome of Australia's ongoing public health responses and interventions, outside of the first and second wave of COVID-19 in Victoria, there has been no observation of excess mortality associated with COVID-19.²

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In the domain of fertility, while public sentiment towards family formation and birth is likely to shift during economic hardship and uncertain future, we are not anticipating a marked reduction in fertility rate at this stage. Since 2008, the fertility rate of Australia has been gradually declining (2.023 in 2008 cf. 1.657 in 2019) while total number of births has been steady (around 300,000 p.a.). This trend is likely to continue.

As such, the catchment's increase in population as a result of natural change, which accounts for 29% of population growth, will likely be unaffected by COVID-19.

Unknown impact to internal migration

COVID-19 has caused a reset on our centralised workforce and increased the prevalence of remote working. This comes as the latest provisional regional internal migration estimates³ confirm that capital cities have had a net loss of over 11,200 to internal migration in the September 2020 quarter, the largest net loss on record.

While this appears to depict a mass movement of people out of capital cities, it is, however, a result of a reduction of arrivals (41,800 cf. 46,800 September 2019 quarter) and a slight increase in departure (53,000 cf. 52,400 September 2019 quarter).

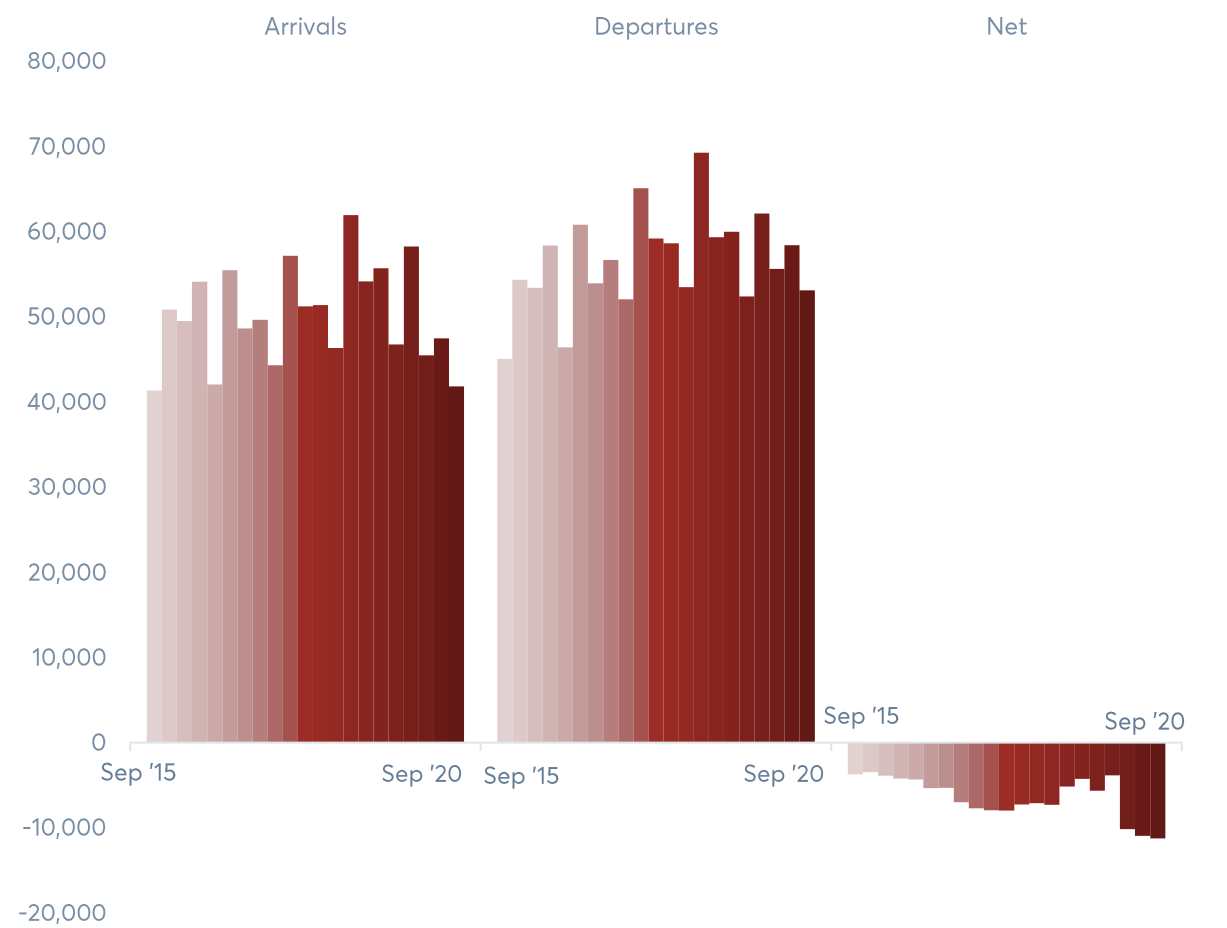
As such, the demographic impact of COVID-19 on the catchment's growth through internal migration remains unknown.

² Australia Bureau of Statistics 2021, *Measuring excess mortality in Victoria during the COVID-19 pandemic*, ABS Website, accessed 25 March 2021.

³ Australia Bureau of Statistics 2021, *Regional internal migration estimates, provisional*, ABS Website, accessed 1 April 2021.

Internal migration

Quarterly internal migration (arrival, departure, net), capital cities combined, September 2015 to September 2020.



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The expanding suburban sprawl

The catchment's strong historical growth through natural increase, internal migration and overseas migration forms part of Melbourne's suburban expansion.

Owing to rapid development, new communities in the catchment have been leading the population growth.

Surrounding the development site, Craigieburn – West and Mickleham – Yuroke are both new areas that have grown to almost 10-times its size in just ten years. From populations of several thousands, Craigieburn – West (20,202) and Mickleham – Yuroke (11,227) have both become large population centres since 2009.

A similar pattern can be observed further east in Wollert and Epping.

Almost all (97%) of Wollert's population of 16,073 has been a result of population increase over the past decade. Epping – West has also added almost 10,000 residents over the same period, accounting for 75% of its current population.

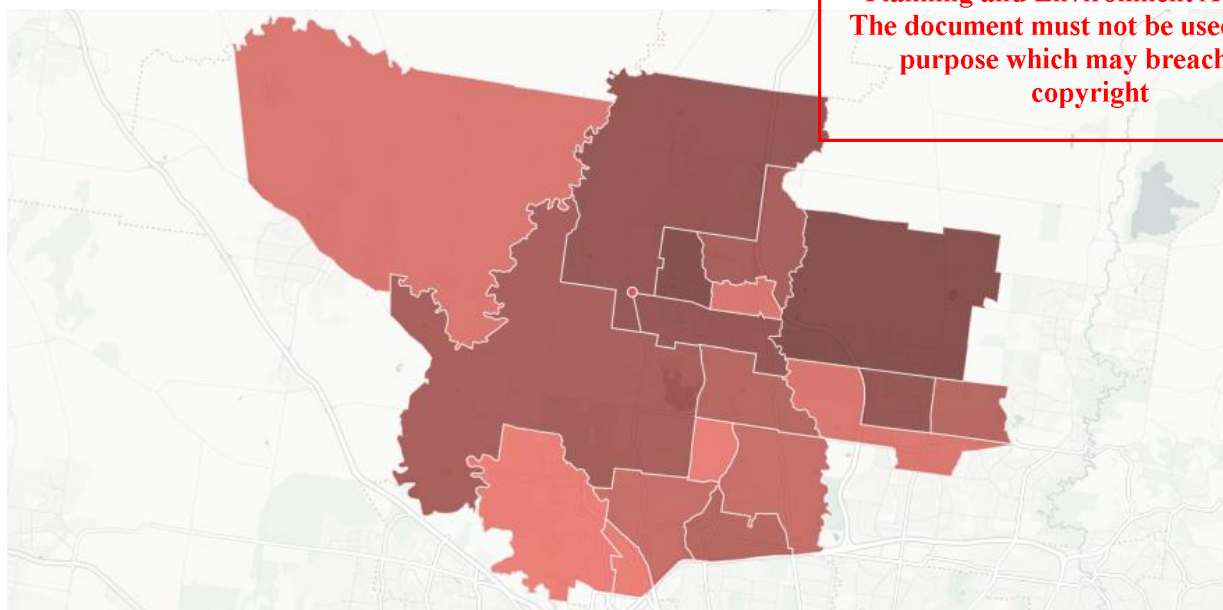
The catchment's major population centres, however, remain east of the development site in Craigieburn and south in Roxburgh Park – Somerton.

Craigieburn – Central, Craigieburn – North, Craigieburn – South, and Craigieburn – West have a combined residential population of 62,996. In the south, Roxburgh Park – Somerton (25,060), Greenvale – Bulla (20,176), Gladstone Park – Westmeadows (18,732) and Campbellfield – Coolaroo (17,205) are all large population centres growing steadily in the catchment.

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Population growth in the catchment area

The darker the area, the larger the population growth, 2009 to 2019.

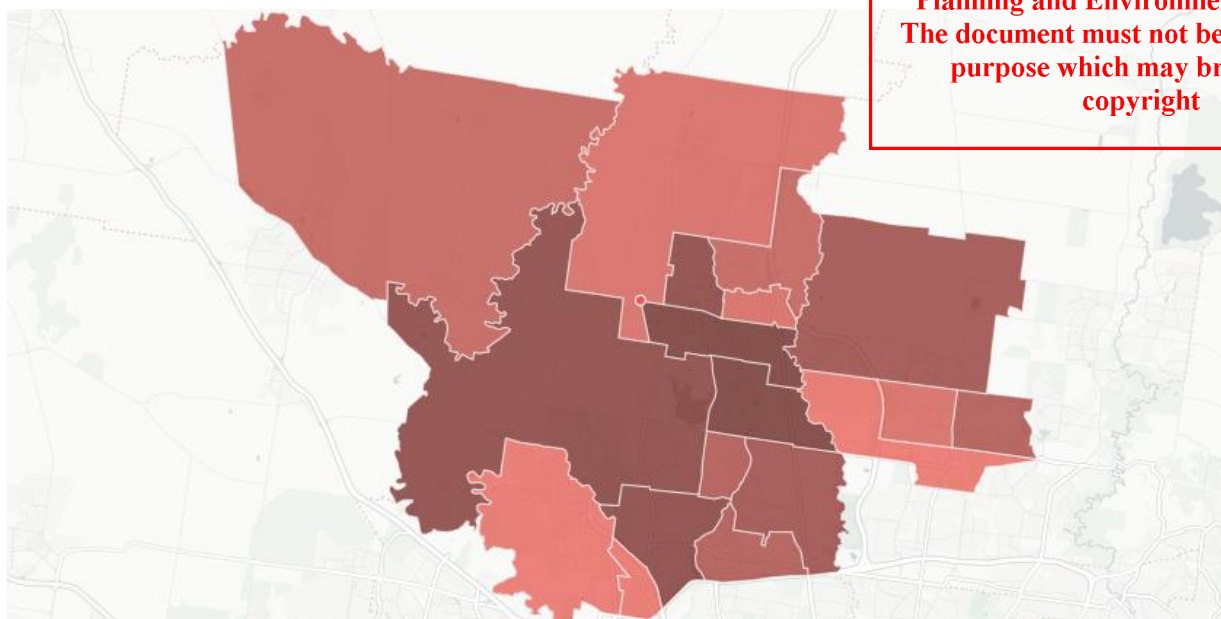


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	2009	2019	# Change	% Change
Craigieburn - West	2,124	20,202	18,078	851%
Wollert	418	16,073	15,655	3745%
Mickleham - Yuroke	1,330	11,227	9,897	744%
Epping - West	3,314	13,105	9,791	295%
Craigieburn - South	11,606	20,617	9,011	78%
Greenvale - Bulla	12,902	20,176	7,274	56%
Craigieburn - North	7,019	13,337	6,318	90%
Roxburgh Park - Somerton	19,589	25,060	5,471	28%
Broadmeadows	11,791	14,574	2,783	24%
Epping - East	11,740	14,051	2,311	20%
Gladstone Park - Westmeadows	17,980	18,732	752	4%
Campbellfield - Coolaroo	16,455	17,205	750	5%
Craigieburn - Central	8,118	8,840	722	9%
Sunbury	12,961	13,558	597	5%
Epping - South	8,514	8,767	253	3%
Tullamarine	6,605	6,842	237	4%
Meadow Heights	15,692	15,770	78	0%
Melbourne Airport	144	194	50	35%

Population distribution in the catchment area

The darker the area, the larger the population, 2019.



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	2009	2019	# Change	% Change
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Epping - South	8,514	8,767	253	3%
Tullamarine	6,605	6,842	237	4%
Melbourne Airport	144	194	50	35%

Age profile

A young population

The population of the catchment area is young. With a median age of 34, the catchment is younger than the Melbourne (36) and state median (37). While this has increased from a median age of 33 since 2014, it still indicates an overall young age structure, where 50% of the catchment’s fast-growing population is under the age of 34.

This is a direct result of the catchment’s higher than average proportion of family-forming adults (aged 25 to 44) and young people under 20.

Almost one in three in the catchment are aged 25 to 44 (32%), spanning young adulthood and the family-forming stages of life. Another 29% of the catchment are young people under 20. The proportion of both age groups are above the state (23% aged 25 to 44, 24% under 20) and capital city average (31% aged 25 to 44, 24% under 20). The proportion of young adults and family-formers, in particular, is almost 1.5 times that of the state.

Retirement-ready residents (65+) on the other hand are just 10% of the population of the catchment, less than half of the state average (21%) and four percentage-points below that of Melbourne (14%).

Influx of young adults and family-formers

The catchment’s high proportion of young adults and family-formers (aged 25 to 44) can be attributed to an influx over the past decade.

Since 2009, the number of residents aged 25 to 44 has increased by 32,934. Proportionally, this accounts for more than a third of the total population growth of the catchment (37%). Combined with the growth in young people under 20 (24,195), which accounts for more than a quarter of the catchment’s growth (27%), almost two-thirds of the catchment’s growth over the past decade (63%) are young people or family-formers.

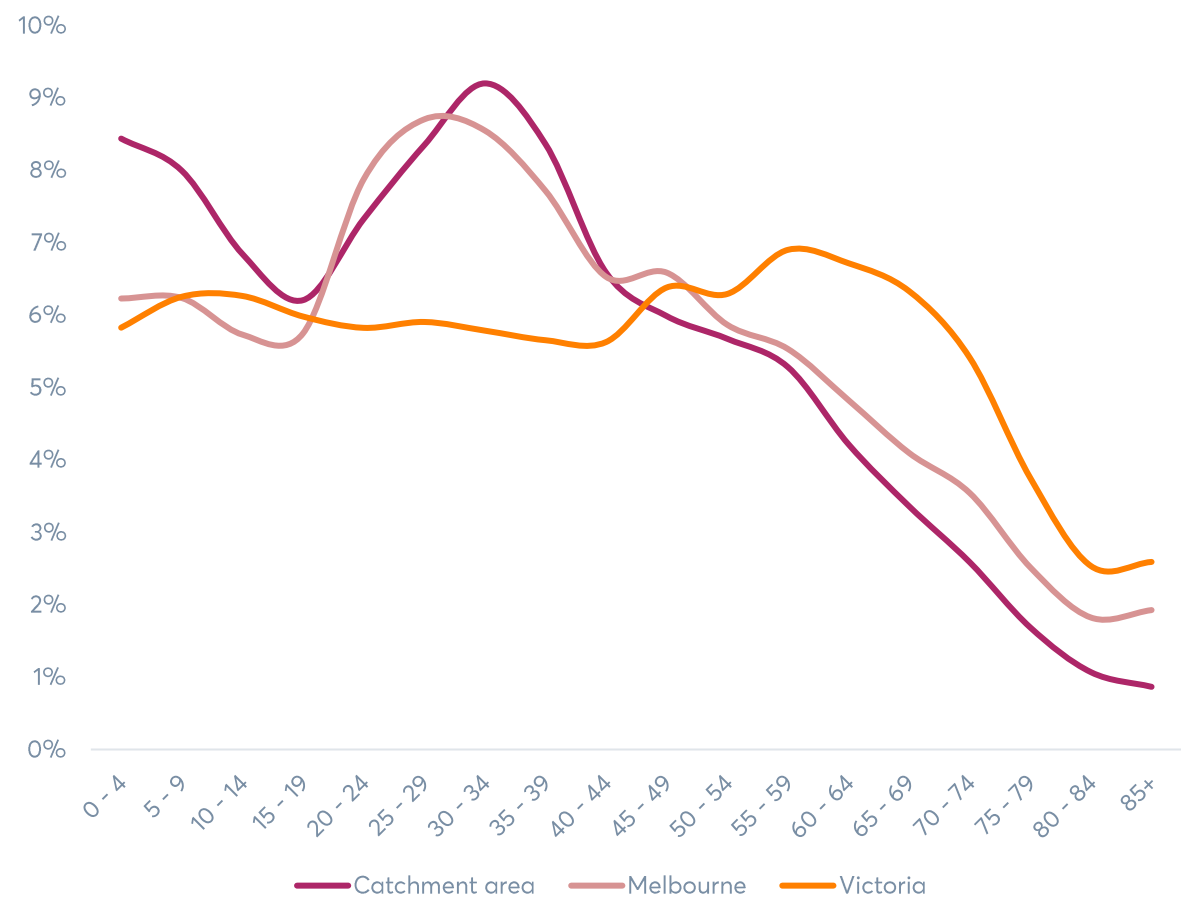
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Median age

	2014	2019
Catchment area	33	34
Melbourne	36	36
Victoria	37	37
Australia	37	37

Age distribution

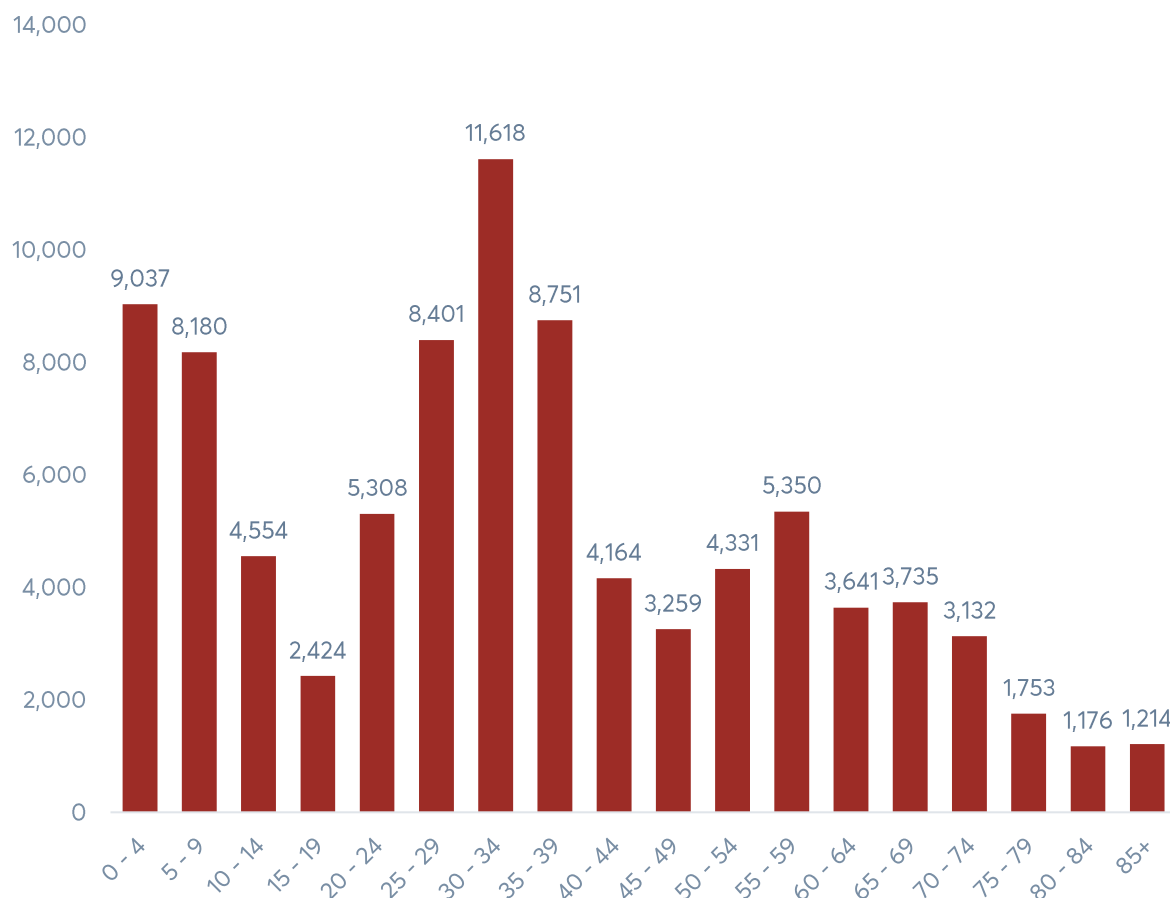
Proportional age distribution of the catchment area, Melbourne, and Victoria, 2019.



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Population growth by age

Numerical growth in the catchment area by five-year age groups, 2009 to 2019.



Key age groups

	2009	2019	# Change	% Change
Children under 10	25,222	42,439	17,217	68%
Young people under 20	51,948	76,143	24,195	47%
Young adults and family-formers (25 to 44)	50,994	83,928	32,934	65%
Retirement-ready residents (65+)	13,690	24,700	11,010	80%

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Increasing population of under 20s around the development site

Large and growing population centres in the catchment for young people (under 20s) are similar to that of the overall population. More than one in four young people (27%) live just east of the development site in Craigieburn - Central, North, South or West (20,243). Roxburgh Park – Somerton (8,476), Greenvale – Bulla (5,410), and Campbellfield – Coolaroo (4,964) are other large under 20s areas, all in the catchment's south.

A growing number of young people, however, are in Craigieburn – West and Wollert in the east. These two areas have increased by more than 6,000 and 5,000 young people over the past decade respectively, accounting for almost half the growth of under 20s of the catchment (47%).

More than one in three in Mickleham – Yuroke are under 20

Mickleham – Yuroke is a rapidly developing area with a high rate of population growth. The overall population has increased to 8.5 times its size in just ten years (1,330 in 2009 cf. 11,227 in 2019). The under 20 population is growing at an even faster rate, increasing to more than 9.5-times its size over the same period (395 in 2009 cf. 3,783 in 2019).

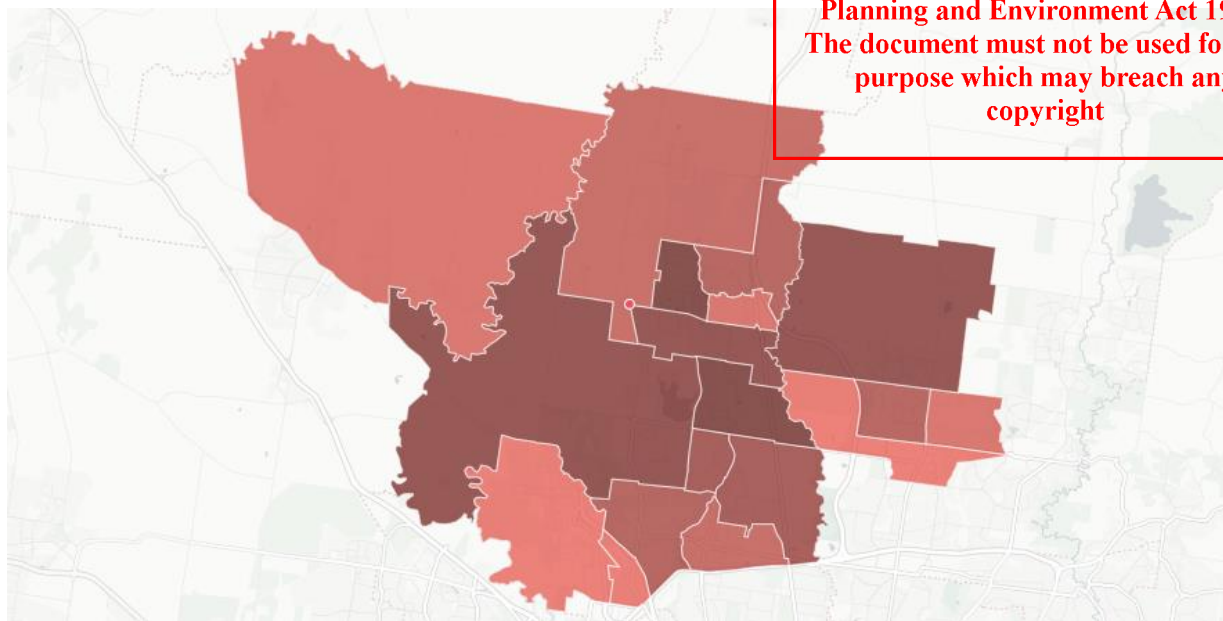
At present, more than one in three in Mickleham – Yuroke (34%) are under the age of 20.

Proportionally, the only areas younger are Craigieburn – North (35%) and Roxburgh Park – Somerton (34%).

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Population distribution of under 20s in the catchment area

The darker the area, the larger the population of under 20s, 2019.



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	2009	2019	# Change	% Change
Roxburgh Park - Somerton	7,464	8,476	1,012	14%
Craigieburn - West	617	6,799	6,182	1002%
Craigieburn - South	3,938	6,319	2,381	60%
Greenvale - Bulla	3,977	5,410	1,433	36%
Wollert	76	5,294	5,218	6866%
Campbellfield - Coolaroo	4,979	4,964	-15	0%
Meadow Heights	5,506	4,757	-749	-14%
Craigieburn - North	2,378	4,654	2,276	96%
Gladstone Park - Westmeadows	4,424	4,311	-113	-3%
Epping - West	989	4,242	3,253	329%
Broadmeadows	3,394	4,018	624	18%
Mickleham - Yuroke	395	3,783	3,388	858%
Epping - East	3,488	3,662	174	5%
Sunbury	4,010	3,589	-421	-10%
Craigieburn - Central	2,691	2,471	-220	-8%
Epping - South	2,247	2,076	-171	-8%
Tullamarine	1,326	1,310	-16	-1%
Melbourne Airport	49	8	-41	-84%

Education affiliation

Independent sector growing almost three times as fast as the government and Catholic sector

In alignment with the growth in young people, the number of students in the catchment has also been increasing. Since 2006, there has been a growth of 8,228 students in the catchment area, equating to a ten-year growth rate of 31%.

This growth, however, is not uniform across the education sectors.

There has been an increase of more than 4,000 government students in the catchment since 2006, growing at a ten-year rate of 25%. Catholic students are increasing at a slightly faster rate (27%). The independent sector, on the other hand, is rapidly growing. The number of students attending an independent school have been growing at a ten-year rate of 72%, almost three times as fast as the government and Catholic sector.

As a result, the independent sector's share of students has increased from 12% in 2006 to 15% in 2016. Whereas both the government (65% in 2006 cf. 62% in 2016) and Catholic sector (24% cf. 23%) have declined.

Across Melbourne, 62% of students attend a government school, followed by 22% who attend a Catholic school and 16% who attend an independent school. In the catchment, a number of areas have a higher level of independent affiliation than the Melbourne average (Greenvale – Bulla, Campbellfield – Coolaroo, Mickleham – Yuroke, Meadow Heights, Roxburgh Park – Somerton, and Craigieburn – North).

All of the above high independent-affiliation areas, with the exception of Meadow Heights, are either growing areas of young people or large population centres, highlighting a number of strategic growth areas with high affiliation to independent education.

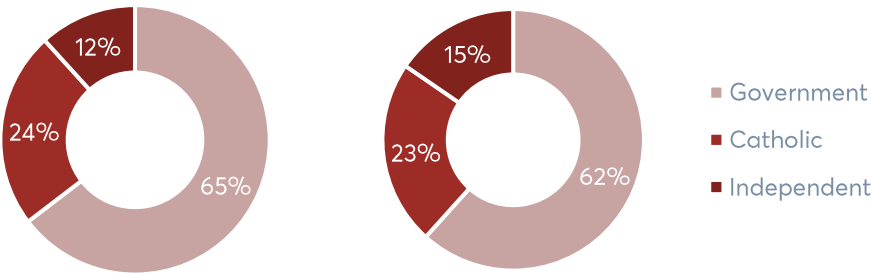
Education affiliation

Proportion of enrolment by affiliation.

2006

Catchment

2016



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Enrolments in the catchment area

	2006	2016	# Change	% Change
Total enrolments	26,551	34,779	8,228	31%
Government	17,154	21,448	4,294	25%
Catholic	6,282	7,965	1,683	27%
Independent	3,115	5,366	2,251	72%

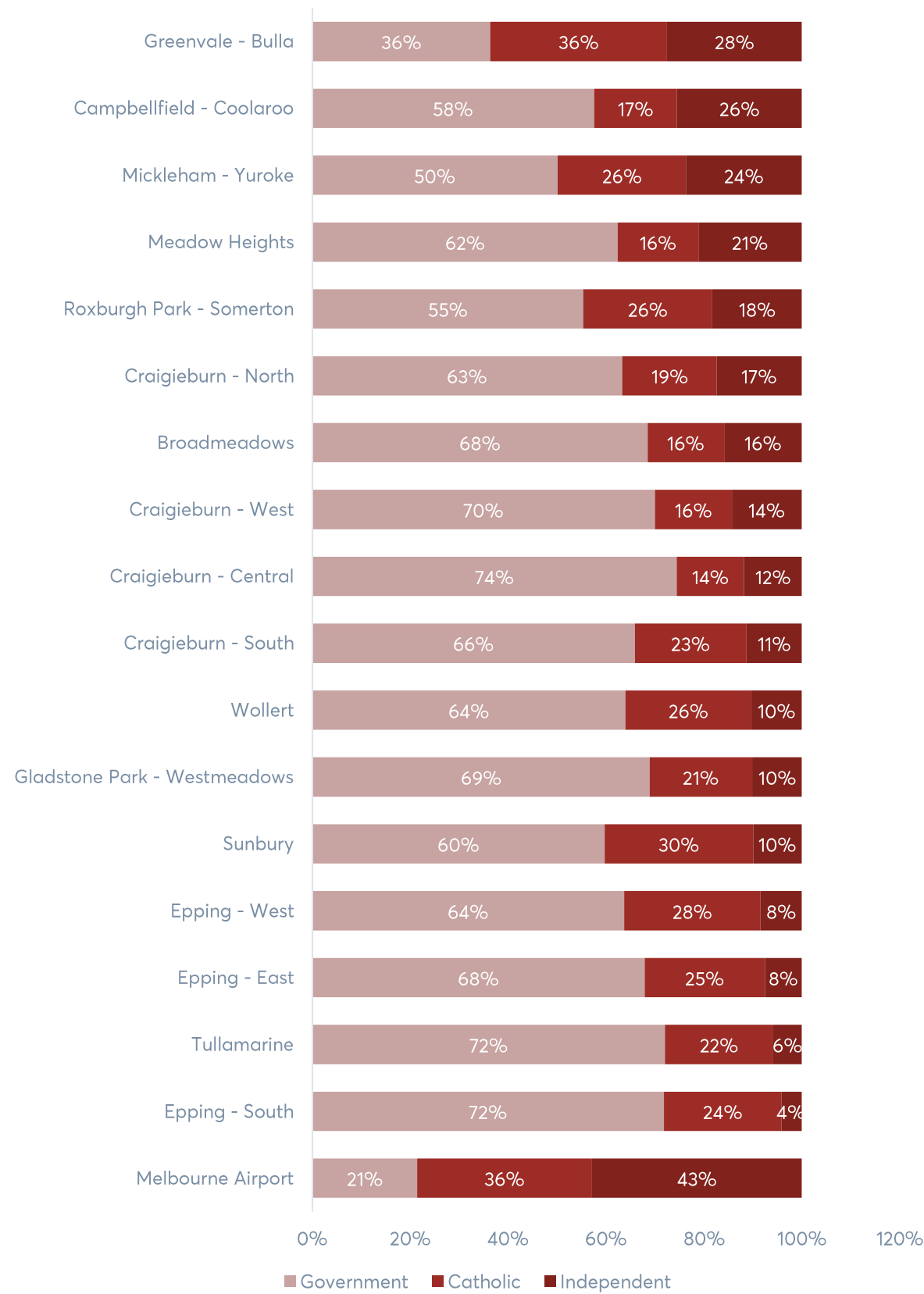
	2006	2016	# Change	% Change
Preschool	2,344	3,620	1,276	54%
Primary				
Government	9,648	12,520	2,872	30%
Catholic	3,534	4,579	1,045	30%
Independent	1,418	2,632	1,214	86%
Total (Primary)	14,600	19,731	5,131	35%
Secondary				
Government	7,506	8,928	1,422	19%
Catholic	2,748	3,386	638	23%
Independent	1,697	2,734	1,037	61%
Total (Secondary)	11,951	15,048	3,097	26%

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Education affiliation

Proportion of enrolment by affiliation, 2016.



Family composition

Three in five households in the catchment are families with children

The catchment area surrounding the development site is highly family oriented. Almost three in five households (58%) are families with children, where couple family with children (45%) and one parent family (13%) are the most common household types.

Couple without children comprise one in five households (19%) in the catchment. Lone person and groups also make up 15% and 2% of households respectively.

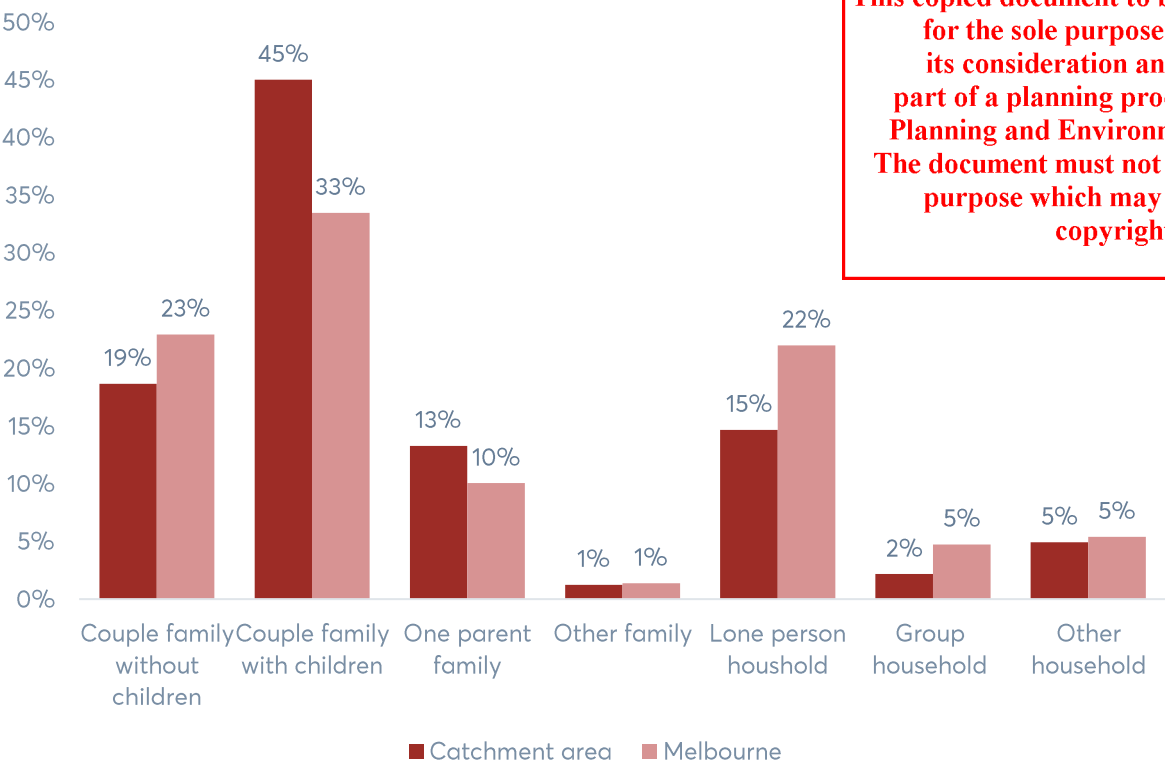
High family orientated areas in the south and the east

The catchment's high level of family composition is more than ten percentage-points above the Melbourne average (58% cf. 43%). Large and growing population centres are particularly family oriented.

Almost three in four households in Roxburgh Park – Somerton (73%) are families with children, almost doubling the average across Melbourne (44%). Craigieburn is also highly family oriented (70% North, 63% South, 62% West, 58% Central), as is Greenvale – Bulla (66%).

Household composition

Proportional household composition of the catchment area and NSW, 2016.

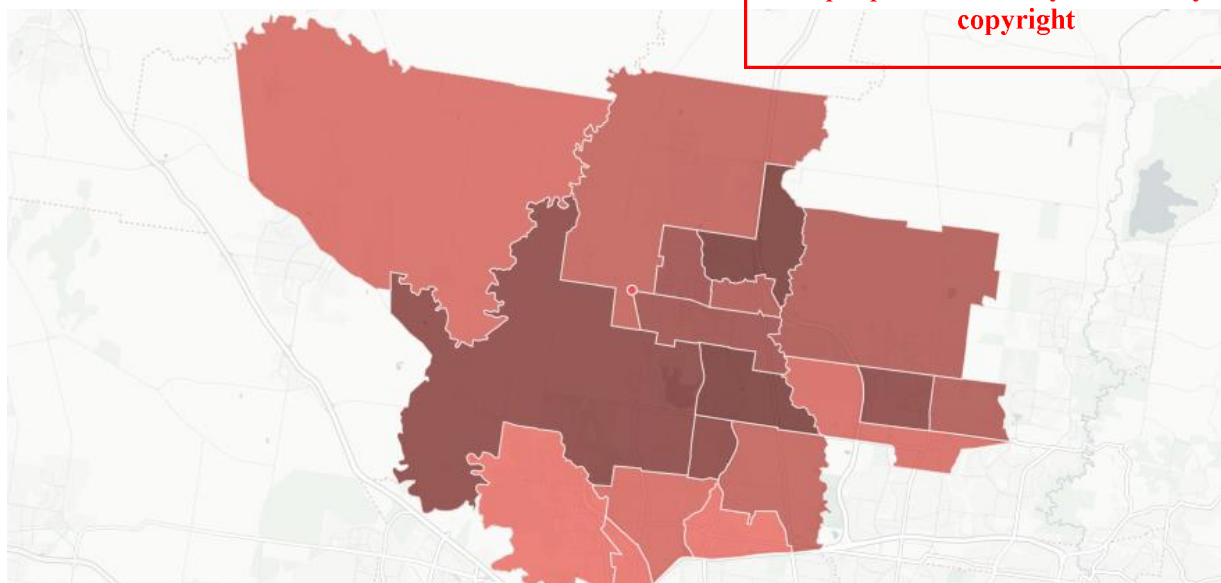


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Families with children in the catchment area

Proportion of family with children households, the darker the area, the higher the proportion, 2016.



	Households	Families with children	% Families with children
Roxburgh Park - Somerton	5,664	4,150	73%
Craigieburn - North	3,294	2,292	70%
Greenvale - Bulla	4,845	3,188	66%
Epping - West	3,357	2,152	64%
Meadow Heights	4,357	2,781	64%
Craigieburn - South	4,946	3,103	63%
Craigieburn - West	4,257	2,658	62%
Wollert	2,845	1,696	60%
Craigieburn - Central	2,672	1,561	58%
Epping - East	4,283	2,416	56%
Mickleham - Yuroke	1,088	609	56%
Campbellfield - Coolaroo	5,083	2,762	54%
Sunbury	4,326	2,296	53%
Epping - South	2,956	1,494	51%
Gladstone Park - Westmeadows	6,400	3,137	49%
Broadmeadows	4,479	2,123	47%
Tullamarine	2,755	1,024	37%
Melbourne Airport	26	6	23%

Income

Income of the catchment slightly below average

The median annual personal and household income of the catchment are \$30,992 and \$76,362 respectively, slightly below the median of Melbourne (\$34,996 and \$80,028). Though also slightly behind the Melbourne average, income levels have been growing in the catchment.

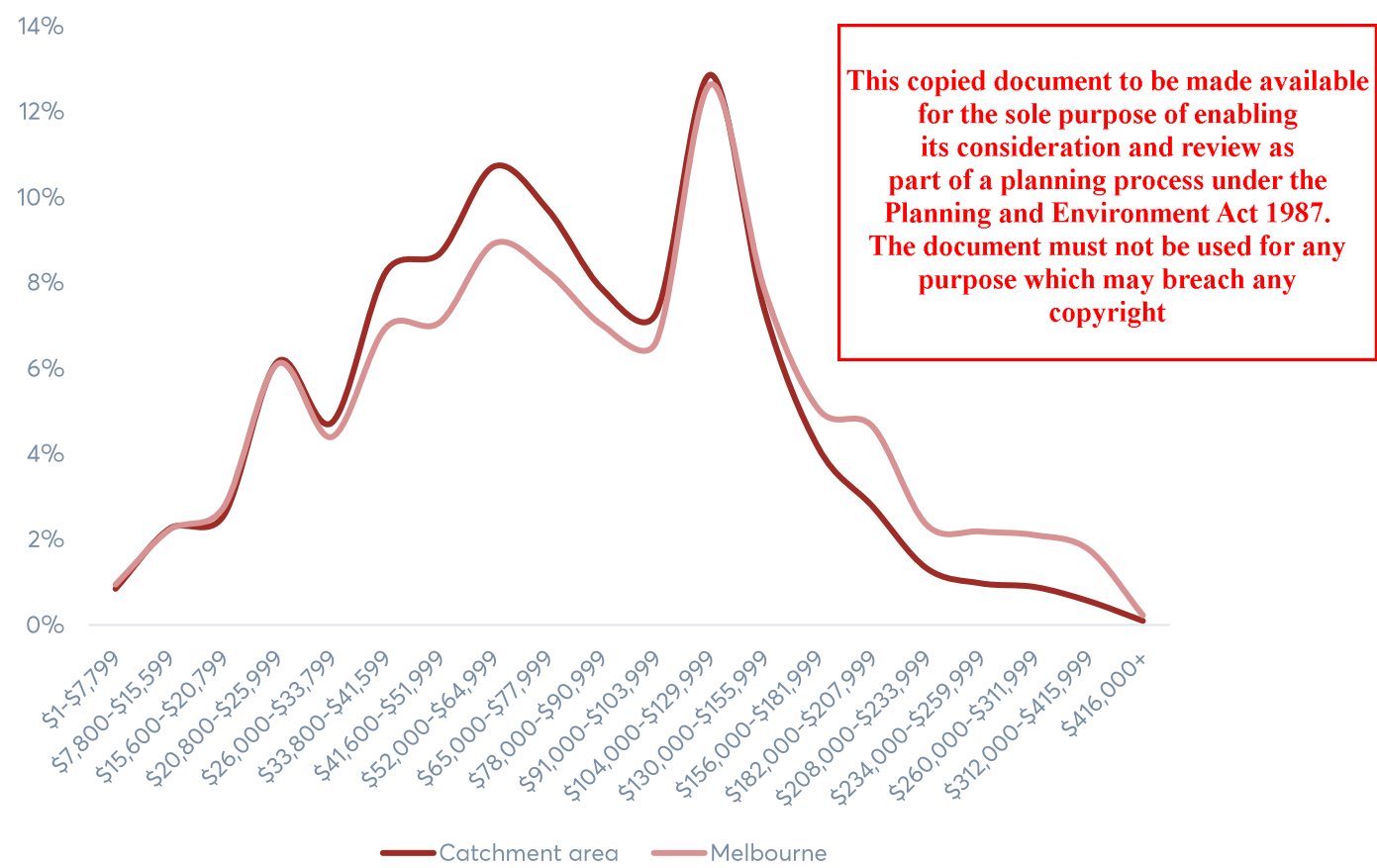
Over the past decade, personal income has increased by 35% and household income by 38% in the catchment, just behind the income growth across Melbourne (40% personal and 41% household).

Positively, however, the rise of housing costs is also less acute than that of Melbourne.

Over the past decade, mortgage repayments in the catchment have increased from \$1,340 per month to \$1,710 (\$16,083 p.a. to \$20,521 p.a.), increasing at a ten-year rate of 28%. Rental cost is similarly increasing, from \$183 per week to \$311 (\$9,510 p.a. to \$16,146 p.a.), increasing at a ten-year rate of 70%. As mentioned, the increase in housing costs is less acute than that of Melbourne over the same period (38% mortgage increase and 75% rent increase).

Annual household income

Proportional distribution of annual household income of the catchment area and Melbourne, 2016.



Catchment area

	2006	2016	\$ Change	% Change
Annual income				
Personal	\$22,903	\$30,992	\$8,089	35%
Household	\$55,166	\$76,362	\$21,196	38%
Housing cost				
Monthly mortgage repayment	\$1,340 (\$16,083 p.a.)	\$1,710 (\$20,521 p.a.)	\$370 (\$4,438 p.a.)	28%
Weekly rent	\$183 (\$9,510 p.a.)	\$311 (\$16,146 p.a.)	\$128 (\$6,636 p.a.)	70%

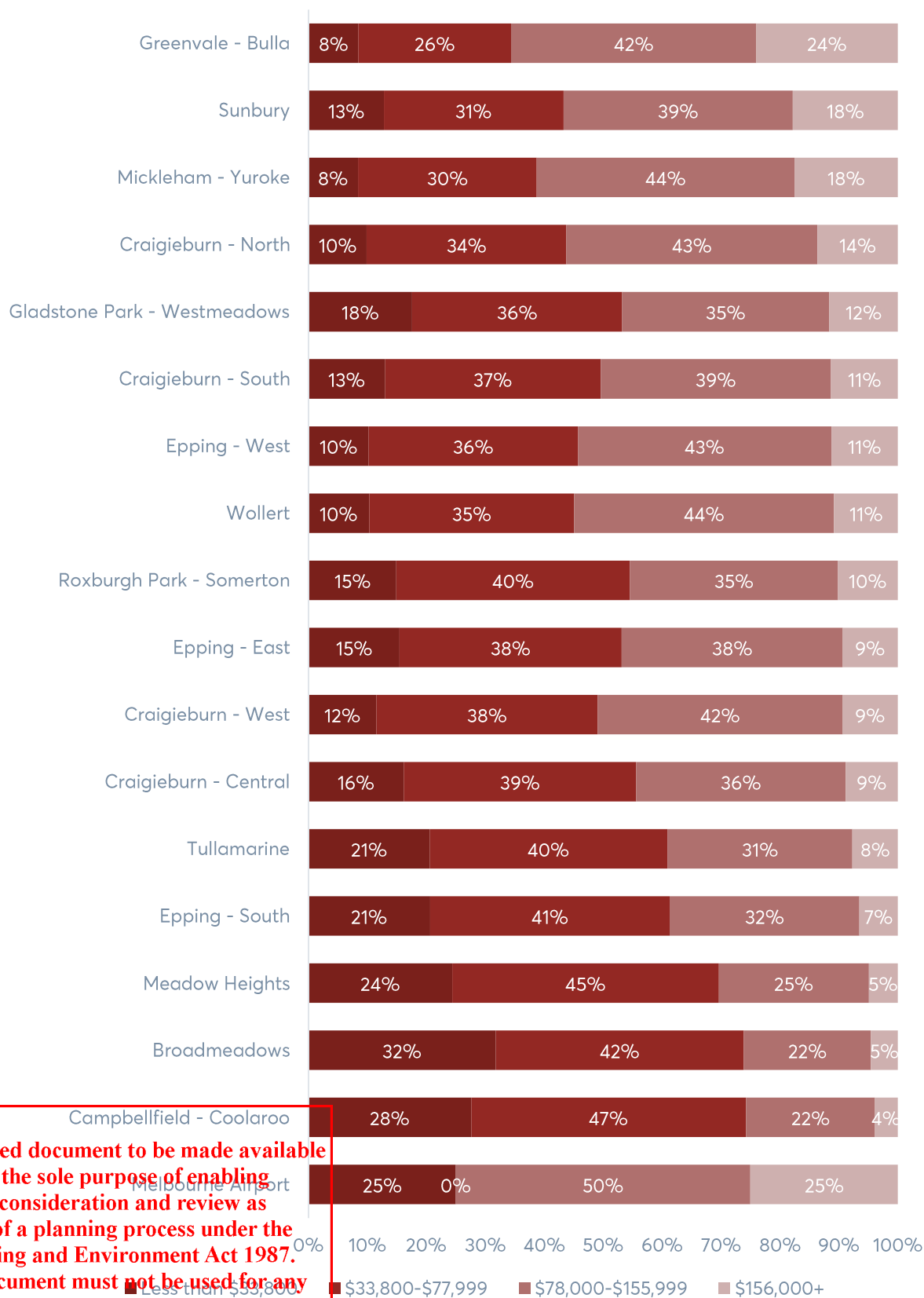
Melbourne

	2006	2016	\$ Change	% Change
Annual income				
Personal	\$25,012	\$34,996	\$9,984	40%
Household	\$56,680	\$80,028	\$23,348	41%
Housing cost				
Monthly mortgage repayment	\$1,300 (\$15,600 p.a.)	\$1,800 (\$21,600 p.a.)	\$500 (\$6,000 p.a.)	38%
Weekly rent	\$200 (\$10,400 p.a.)	\$350 (\$18,200 p.a.)	\$150 (\$7,800 p.a.)	75%

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Annual household income

Proportional annual household income of the catchment area, 2016.



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Qualification and employment

Rising education levels

Alongside the rising population, the catchment area has also been experiencing a growth in those who are highly educated. In 2006, just over one in four residents over the age of 15 (28%) had a Bachelor degree level qualification or higher. The proportion has since increased to 38%. With the boom in population, however, the actual number of residents who are qualified at a Bachelor degree level or higher has, in fact, almost tripled (8,943 in 2006 cf. 26,013 in 2016), demonstrating the rapid rise in education level in the catchment area.

The shift from manufacturing

A shift in major industries of employment has also coincided with the rise in those who are highly educated.

Almost one in five residents over the age of 15 in the catchment (19%) were employed in the manufacturing industry in 2006. Just ten years later, this proportion has halved to just 10%, a result of both a slight decline in manufacturing workers (-2,482) and the influx of residents who are employed in other industries. Health care and social assistance (8% in 2006 cf. 11% in 2016) and education and training (5% in 2006 cf. 7% in 2016), in particular, are growing industries within the catchment.

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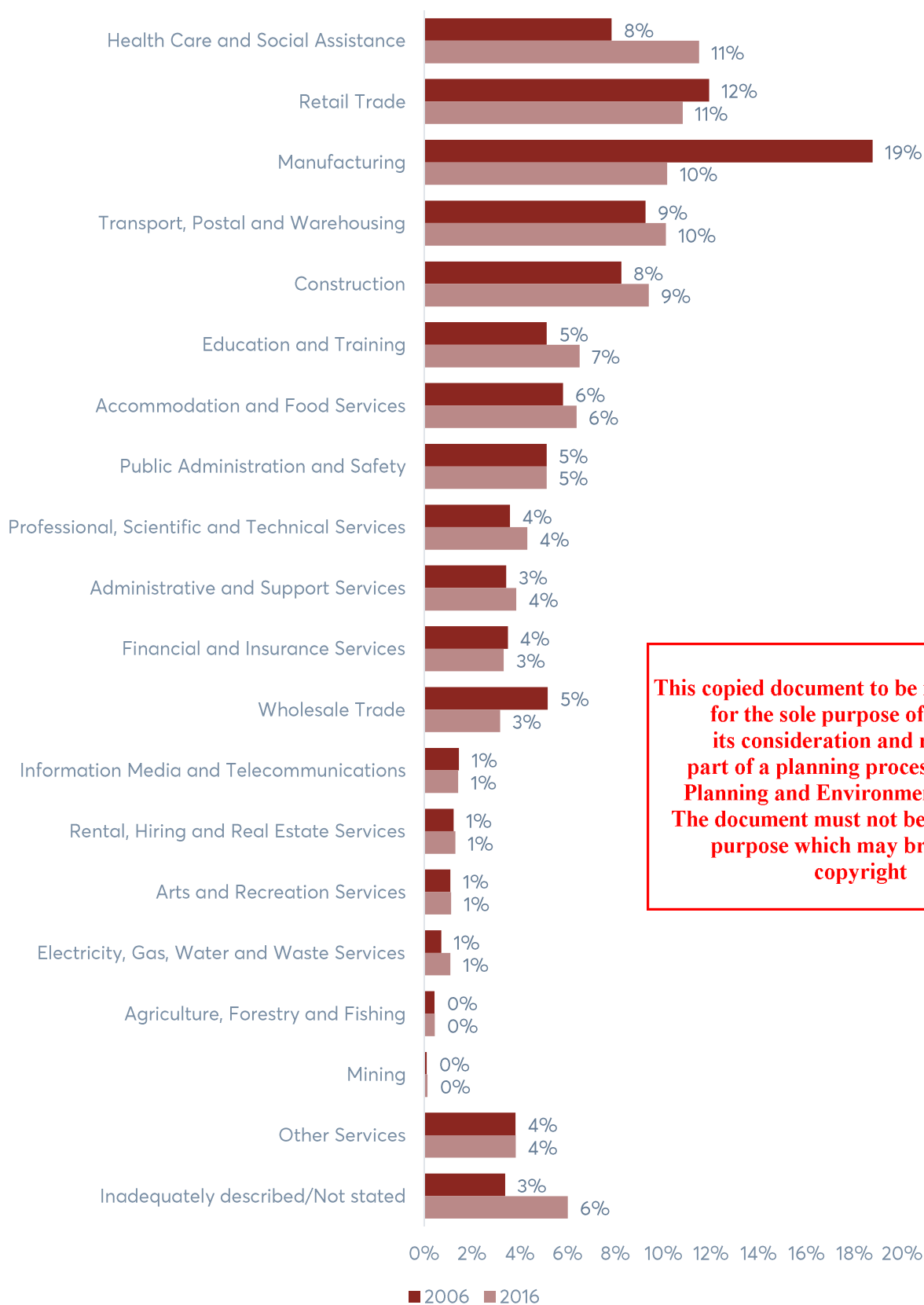
Non-school qualifications

Non-school qualifications of catchment residents aged 15 and above, 2006 to 2016.

	2006	2016
Postgraduate degree level	3%	8%
Graduate diploma and graduate certificate level	2%	3%
Bachelor degree level	23%	26%
Advanced diploma and diploma level	19%	22%
Certificate III & IV level	45%	34%
Certificate I & II level	4%	3%

Industries of employment

Top industries based on proportion of catchment residents aged 15 and above, 2006 to 2016.



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Cultural composition

Growing cultural and linguistic diversity

More than two in five residents were born overseas (42%) and more than one in two speak a language other than English when at home (54%). This is notably higher than the Melbourne average (36% born overseas and 34% speak a language other than English when at home).

The number of residents who are culturally and linguistically diverse is also increasing at a fast rate. Over the past decade, the number of residents born overseas has been increasing at three-times the rate of those who were born in Australia (83% cf. 27%). Number of residents who are linguistically diverse are growing at an even faster rate. Those who speak a language other than English when at home are growing at five times the rate of those who speak English only (83% cf. 17%).

The largest migrant communities in the catchment are from India, comprising 6% of the total population. This is followed by those born in Iraq (5%), Turkey (3%), Sri Lanka (2%), Italy (2%), and Lebanon (2%).

Common non-English languages spoken in the catchment reflects the migrant communities. Arabic is spoken by almost one in ten in the catchment (9%). Turkish (6%), Punjabi (4%), Italian (3%), Hindi (2%), and Greek (2%) are other common non-English languages.

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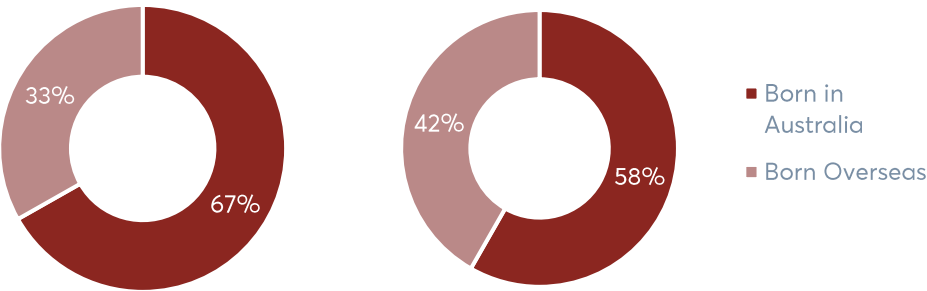
Cultural composition of the catchment area

Proportion of residents born in Australia and overseas.

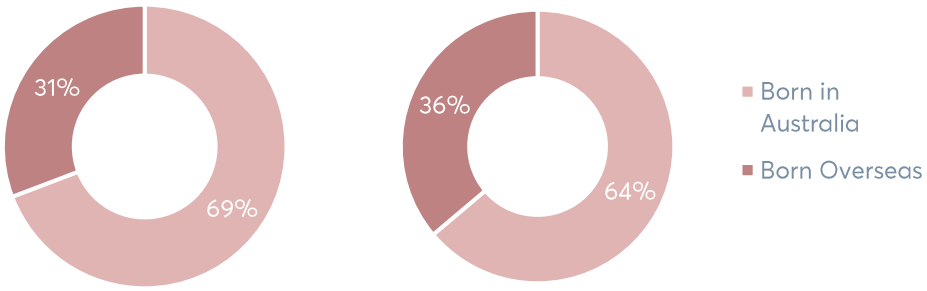
2006

2016

Catchment area



Melbourne



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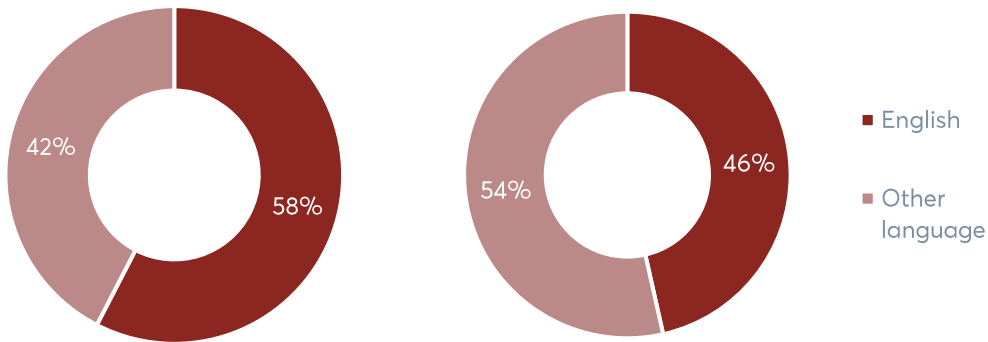
Cultural composition of the catchment area

Proportion of residents who speak English only and a non-English language when at home.

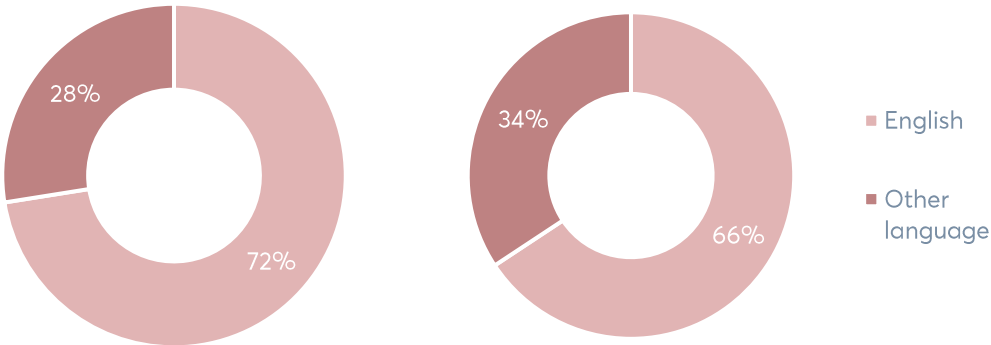
2006

2016

Catchment area



Melbourne



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Religious affiliation

One in two residents of the catchment area identify with Christianity (49%) and almost one in five identify with Islam (17%). This makes Christianity and Islam the largest religious affiliations in the catchment.

One in six in the catchment (15%) identify with secular beliefs, other spiritual beliefs and no religious affiliation. Some also choose not to state a religious affiliation (9%).

Growth in world religions and secularism

Over the past decade, the proportion of residents identifying with Christianity has been declining. More than three in five (62%) reported an affiliation with Christianity in 2006. The proportion has since declined to just one in two (49%).

Over the same period, residents identifying with secular beliefs has increased, as has other major world religions (Islam, Buddhism, Hinduism, and Sikhism), showing a shift from Christianity in the catchment.

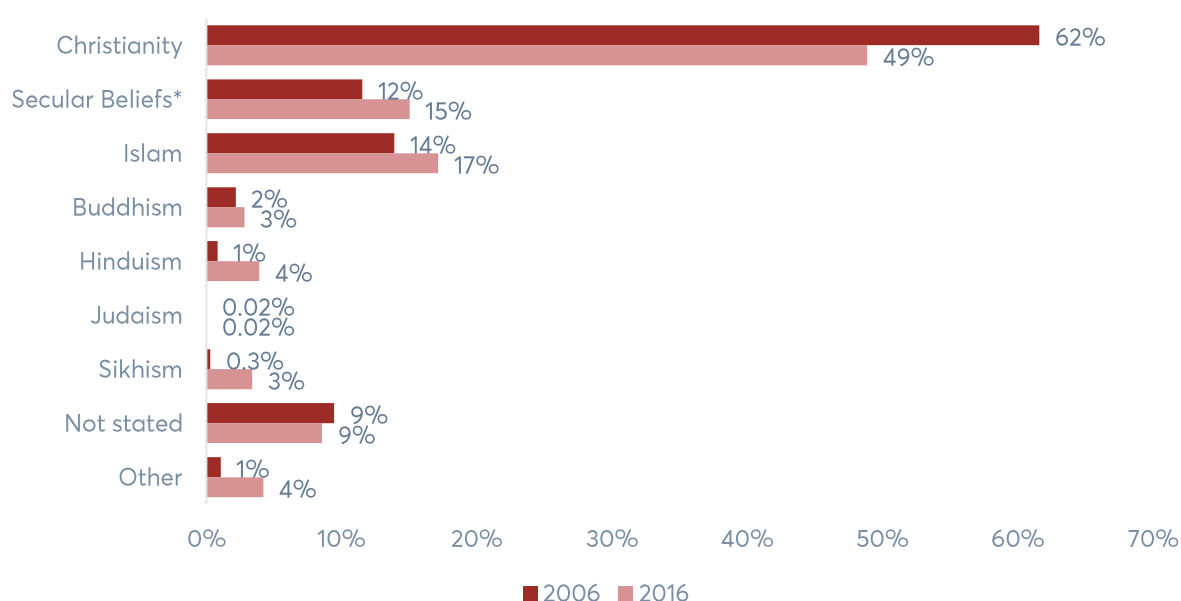
The shift from cultural Christianity in Australia

Beyond the rise of major world religions associated with the increasing cultural diversity in the catchment, the decline in Christian affiliation and the subsequent rise in secularism is reflective of broader social trends impacting Australian culture.

Nationally there has been an observable decline in affiliation with Christianity (64% in 2006 cf. 52% in 2016) and a rise in the number of Australians choosing to identify as non-religious (19% in 2006 cf. 30% in 2016).

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Religious affiliation of the catchment area



*Secular beliefs include: Secular Beliefs and Other Spiritual Beliefs and No Religious Affiliation as defined by the ABS.

The Assyrian community of the catchment area

Connected to a number of countries, languages, and religious affiliations, the Assyrian community is highly represented in the catchment area. As an estimate based on the latest population count, more than 30,000 residents of the catchment are from countries connected to the Assyrian community. More than 13,000 are from Iraq, the catchment's second most common country of birth outside of Australia, followed by Turkey (7,693) and Lebanon (4,546). Other countries commonly connected to the Assyrian communities include Syria (1,877), Iran (1,525), Egypt (1,245), Jordan (259), and Armenia.

In total, residents born in Assyrian-connected countries comprise 12% of the catchment's total population or 31% of the catchment's migrant population. The largest communities are in Roxburgh Park – Somerton (6,843), followed by Meadow Heights (4,174), Campbellfield – Coolaroo (4,131), Broadmeadows (2,546), Craigieburn – South (2,158), Craigieburn – West (2,097), Greenvale – Bulla (1,818) and Gladstone Park – Westmeadows (1,195).

Another key demographic marker of the Assyrian community is language. Assyrian Neo-Aramaic and Chaldean Neo-Aramaic are spoken by almost 15,000 residents of the catchment area. Residents who speak Neo-Aramaic or Chaldean Neo-

Aramaic when at home comprise 6% of the total population of the catchment, or 11% of the catchment's population who speak a non-English language when at home.

Communities who speak Assyrian Neo-Aramaic and Chaldean Neo-Aramaic are similarly largest in Roxburgh Park – Somerton (4,567), Campbellfield – Coolaroo (1,613), Meadow Heights (1,575), Craigieburn – South (1,498), Craigieburn – West (1,388), Greenvale – Bulla (884), Craigieburn – North (712), and Broadmeadows (681).

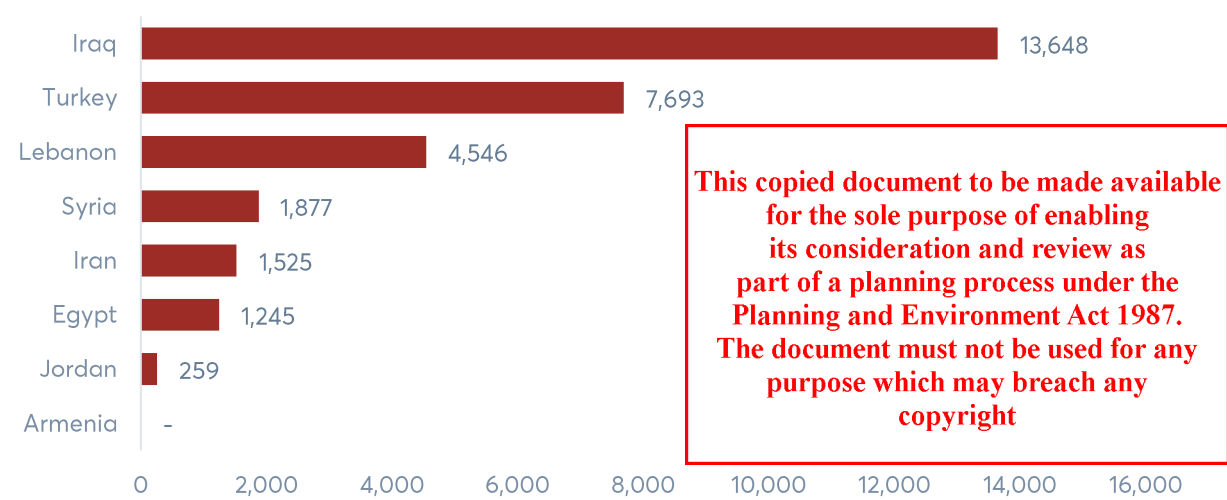
Across the catchment, almost 8,000 residents also identify as Assyrian Christians (Chaldean Catholic, Assyrian Church of the East, Syrian Orthodox Church, Coptic Orthodox Church, Ancient Church of the East, and Assyrian Apostolic, not further defined).

As the migrant population in Australia continues to grow, however, the Assyrian Christian population is also likely to increase. Over the past five years, the Iraq and Iran-born community in Australia has grown by 40% and 30% respectively. The Syrian-born community has also been particularly fast growing, increasing to 2.5-times its size over just five years, indicating the likelihood of growth for the Assyrian Christian community

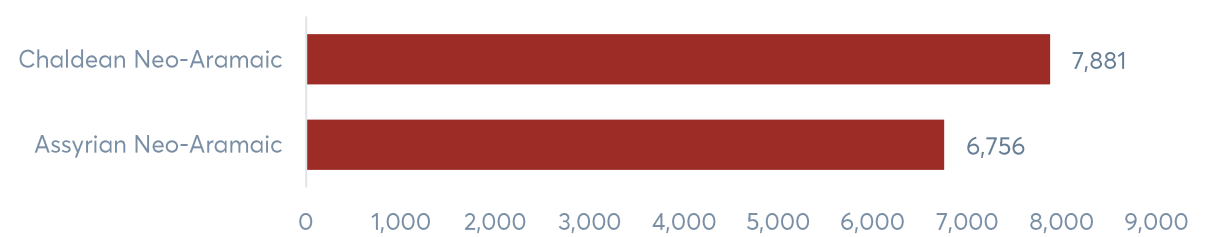
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Assyrian affiliation

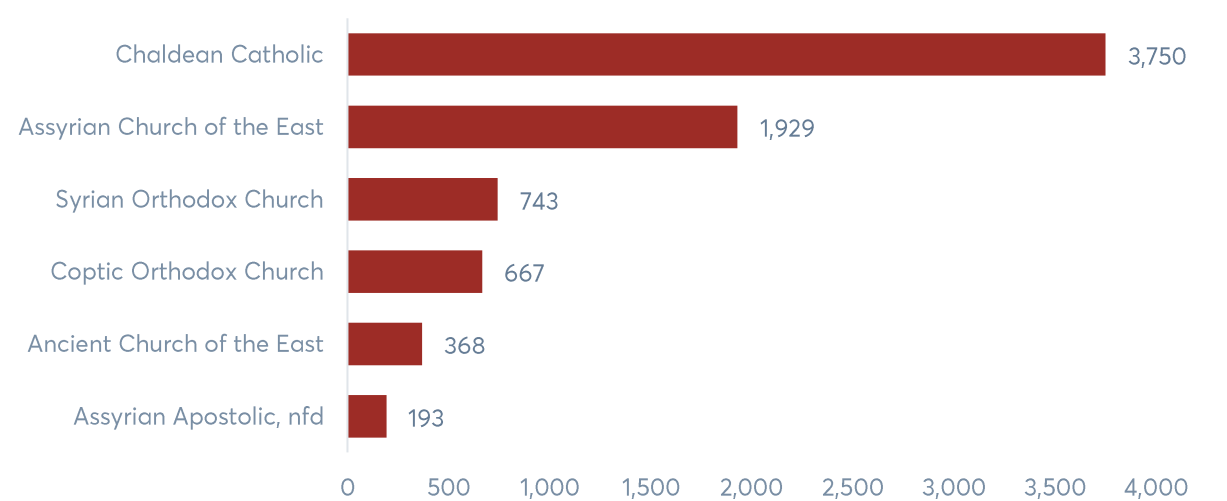
Estimated number of catchment residents born in Assyrian-affiliated countries, 2019.



Estimated number of catchment residents who speak an Assyrian-affiliated language when at home, 2019.



Estimated number of catchment residents who are affiliated with Assyrian Christianity, 2019.



Population projection

The following section of the report uses the Victoria Government's Department of Environment, Land, Water and Planning (DELWP): *Victoria in Future* to consider the expectation of growth in the catchment area. The Government's projections are also compared to historical growth patterns published by the Australian Bureau of Statistics to provide context and analysis of growth.

More than 420,000 residents in the catchment by 2036, 120,000 of them under 20

The population expansion of Melbourne is projected to continue driving the growth of the catchment over the next two decades. From the current population of 258,330, the catchment's population is projected to reach more than 420,000 by 2036, just shy of the current size of the ACT (431,215).

The fast growth that the catchment has been experiencing is also projected to continue.

Over the past decade, population in the catchment has been increasing at more than double the rate across Melbourne (53% cf. 26%). Over the next ten years, this trend is projected to be similar, with the catchment growing at 1.8-times the Melbourne average (35% cf. 20%).

The catchment's population of young people is also expected to grow. Over the next decade, the number of residents under the age of 20 is projected to increase by almost 30,000, equivalent to a ten-year growth rate of 36%.

By 2036, those who are under the age of 20 is projected to make up 29% of the overall population, and those under 10 projected to be 14%. This is almost identical to the current proportion of young people of the catchment (29% under 20 and 16% under 10), demonstrating that the high representation of young people in the area will continue.

The overall population of the area, however, is projected to have a slight shift to older age groups. Proportionally, those over the age of 65 are expected to increase, from just 10% of the total population currently to 13% in 2031, and 14% in 2036. The catchment's high proportion of young adults and family-formers (32% aged 25 to 44) will also decline slightly (29% in 2031 and 27% in 2036) as they move into an older age profile (21% aged 45 to 64 current cf. 22% in 2031 and 23% in 2036).

Based on conservative forecast, catchment projected to be home to more than 10,000 independent students

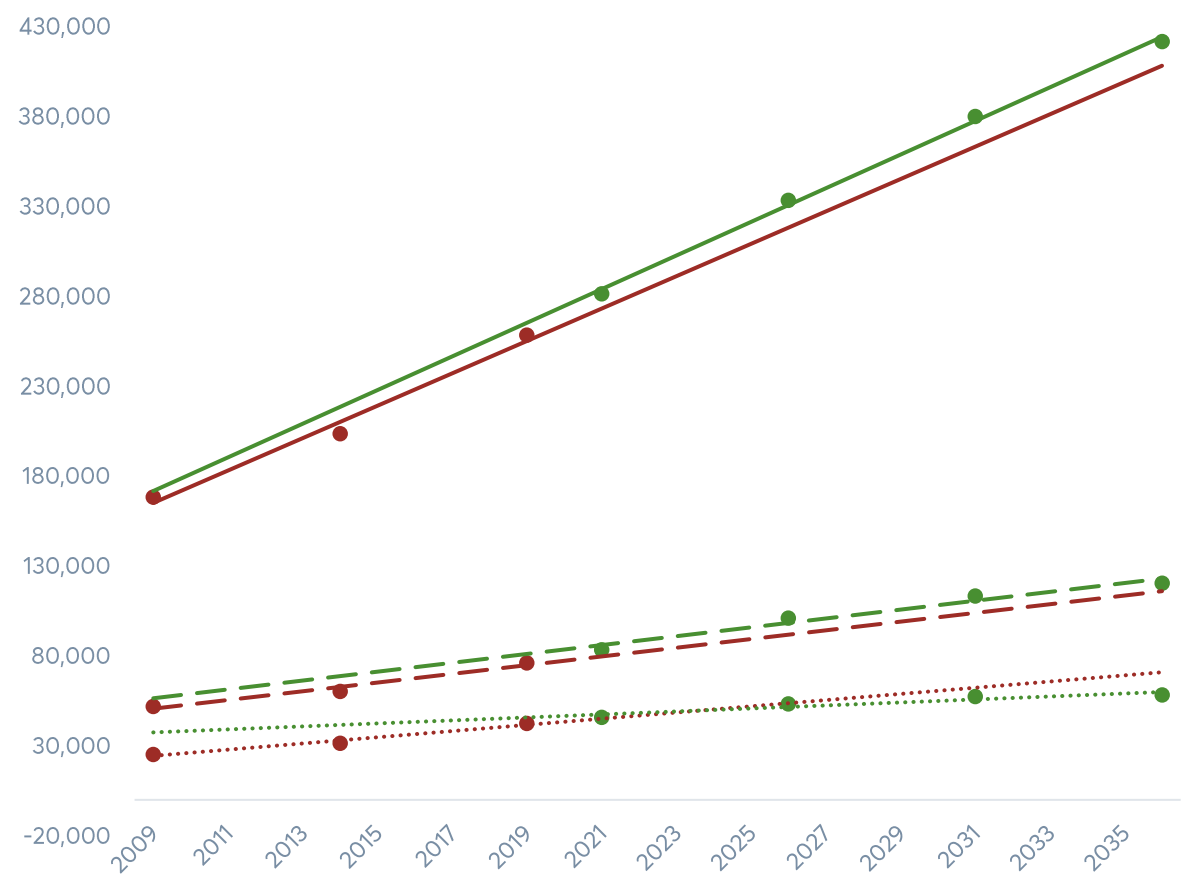
At present, 54.9% of under 20s in the catchment are enrolled primary or secondary school students. The independent sector accounts for 15.4% of students, which has increased from 11.7% just ten years prior. Conservatively assuming, therefore, that the future enrolment ratio (54.9%) and independent market share (15.4%) remains constant, the catchment is projected to be home to 9,600 independent students by 2031.

By the end of the projection period in 2036, this will increase further to 10,200 independent students, almost doubling the number of independent students over just 20 years (5,366 in 2016).

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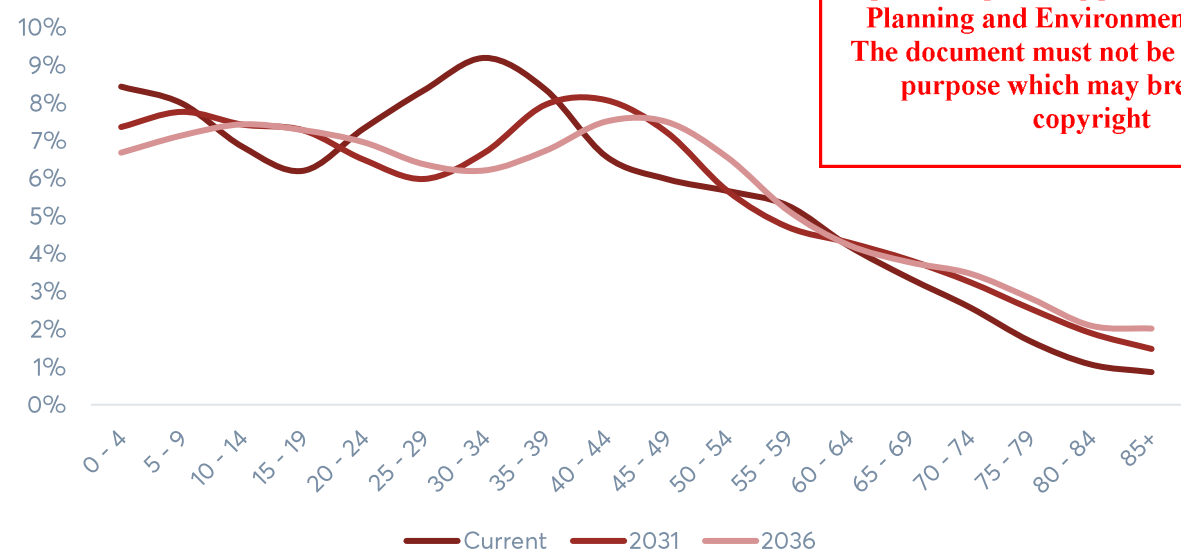
Projected population growth

Catchment's historical population growth (red) and future population projection (green) of the total population (solid line), under 20s (long dash), and under 10s (short dash).



Projected age distribution

Proportional age distribution of the catchment area.



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More than 200,000 in neighbouring areas of development site by 2036

While the major population centres currently are to the east in Craigieburn and south in Roxburgh Park – Somerton, this is projected to change in the future to areas around the development site.

The fast-developing Wollert (418 in 2009 cf. 16,073 in 2019) in the catchment's east is projected to be home to almost 64,000 residents by 2036, quadrupling in size in less than 20 years, also making it the largest population centre in the catchment.

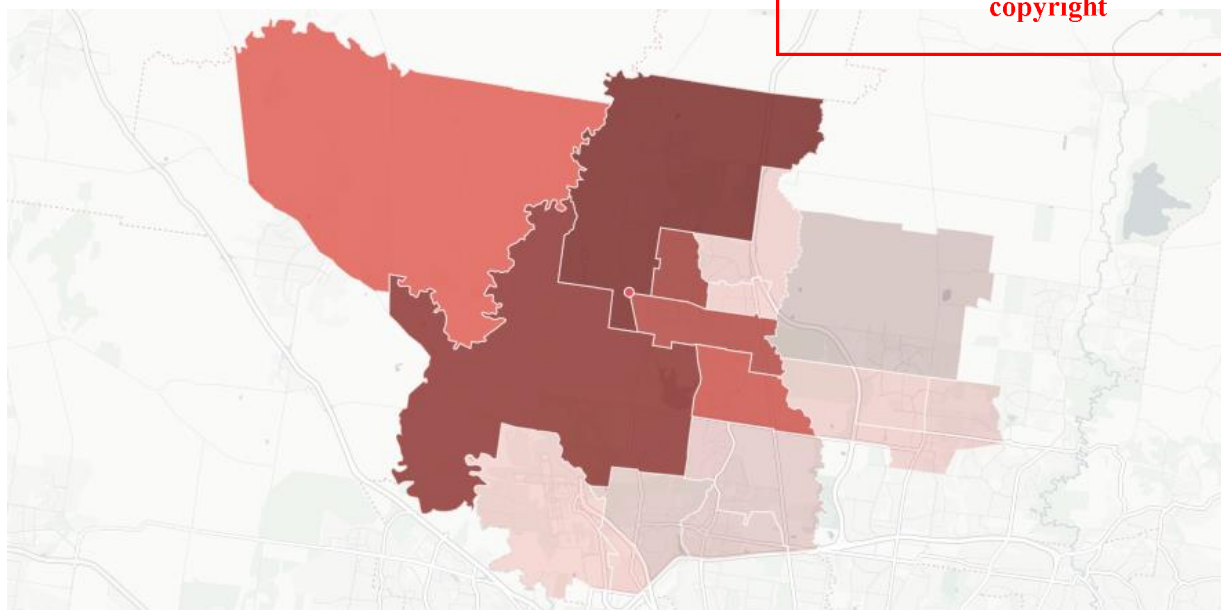
Mickleham – Yuroke, where the site is located, is projected to be the second largest population centre. With a projected 2036 population of more than 58,000, Mickleham – Yuroke is projected to grow to more than 5-times its current size (11,227).

Other large population centres in the catchment are all in neighbouring areas (35,127 Greenvale – Bulla, 31,305 Craigieburn – West, 28,747 Craigieburn – South, 28,527 Roxburgh Park – Somerton, 22,305 Sunbury), putting more than 200,000 people within close proximity of the site. An influx of almost 28,000 residents is projected in these areas in the next decade alone. Combined with the projected growth in Mickleham – Yuroke (28,574), from 2021 to 2031, an additional 56,234 people will reside in areas around the development site.

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Future population distribution in the catchment area

Areas with large population, the darker the area, the larger the population, 2034



	Overall population	Under 20s	% under 20s
Wollert	63,746	22,764	36%
Mickleham - Yuroke	58,334	17,024	29%
Greenvale - Bulla	35,127	9,511	27%
Craigieburn - West	31,305	10,426	33%
Craigieburn - South	28,747	8,722	30%
Roxburgh Park - Somerton	28,527	7,528	26%
Sunbury	22,305	5,450	24%
Broadmeadows	21,013	6,277	30%
Gladstone Park - Westmeadows	20,916	4,827	23%
Campbellfield - Coolaroo	19,138	5,178	27%
Epping - East	18,068	4,014	22%
Meadow Heights	16,660	4,189	25%
Epping - West	16,410	4,640	28%
Craigieburn - North	14,284	3,827	27%
Epping - South	9,558	2,068	22%
Craigieburn - Central	9,155	2,270	25%
Tullamarine	8,118	1,610	20%
Melbourne Airport	194	18	9%

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