

# Tasmanian Housing Strategy Exposure Draft

## Data Dashboard

**Homes  
Tasmania**

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creating communities.



# Introduction and Disclaimers

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# Introduction

To assist in development of the Tasmanian Housing Strategy (the Strategy), detailed modelling has been undertaken to model Tasmania's projected housing demand and various elements of demand through to 2041.

The purpose of this modelling is to understand the projected demand for housing by type, number of bedrooms and location across different regions of Tasmania over the next 20 years. The modelling has also projected the number of low income households by their housing tenure, the number of those renting that will be in rental stress and in a separate piece of work the projected demand for social housing, both the met demand (the number of households in social housing) and the unmet demand (the number of households on the Housing Register).

The following pages describes the methodologies, limitations and results of the modelling that has been undertaken and which inform the development the Strategy.

# Limitations and disclaimers

Care has been taken to produce modelling that is fair and accurate. The limitations to the modelling published here are:

- Inputs are based on trends from past Census and Tasmanian Government data, which can change over time.
- COVID-19 has resulted in atypical policies and behaviours (borders, migration patterns, interest rates etc.) and the full affects of these are unknown
- The dwelling demand scenarios with higher densification do not see a change in the number of dwellings – this is unlikely to occur in reality
- Projections are made at each future Census point so limited to five-yearly intervals
- The modelling is subject to same limitations as the interim Tasmanian population projections

DISCLAIMER: This data has been published to show the information that has been used to make decisions in the Strategy. The data throughout should not be relied upon to make investment decisions.

# Population Projections

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# Methodologies and sources: Population projections

Tasmania's population projections are produced by the Tasmanian Department of Treasury and Finance (Treasury) and are published on their website at: <https://www.treasury.tas.gov.au/economy/economic-data>

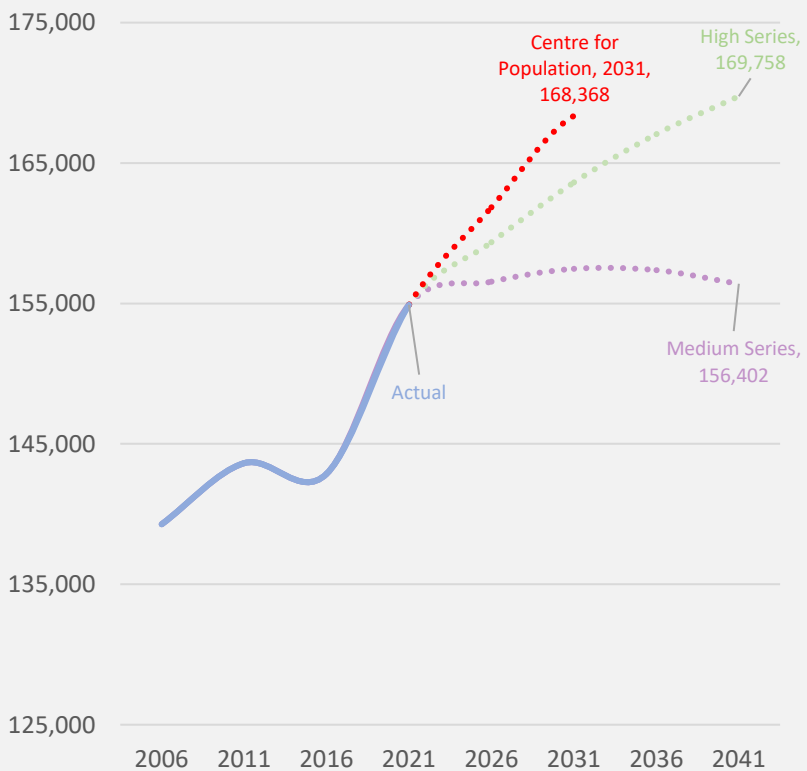
These projections were first published in 2019, but an interim update to these projections was published in November 2022 after the results of the 2021 Census showed an unexpected and large revision to Tasmania's population estimates. Treasury are expected to release a new set of population projections in 2023, which considers all the results of the 2021 Census.

The Strategy's population projections also include a series which are informed by work undertaken by the Australian Government's Centre for Population. These projections are limited by the timeframe for the projections (they project only 10 years, not 20 years) and that they do not include local government area (LGA) projections. To find a means of comparison over the first decade, the total projection for Tasmania as the baseline projection has been used to determine the LGA and regional projections by using the proportions of the total population for an LGA in the given year that are found in the high series of the Treasury projections.

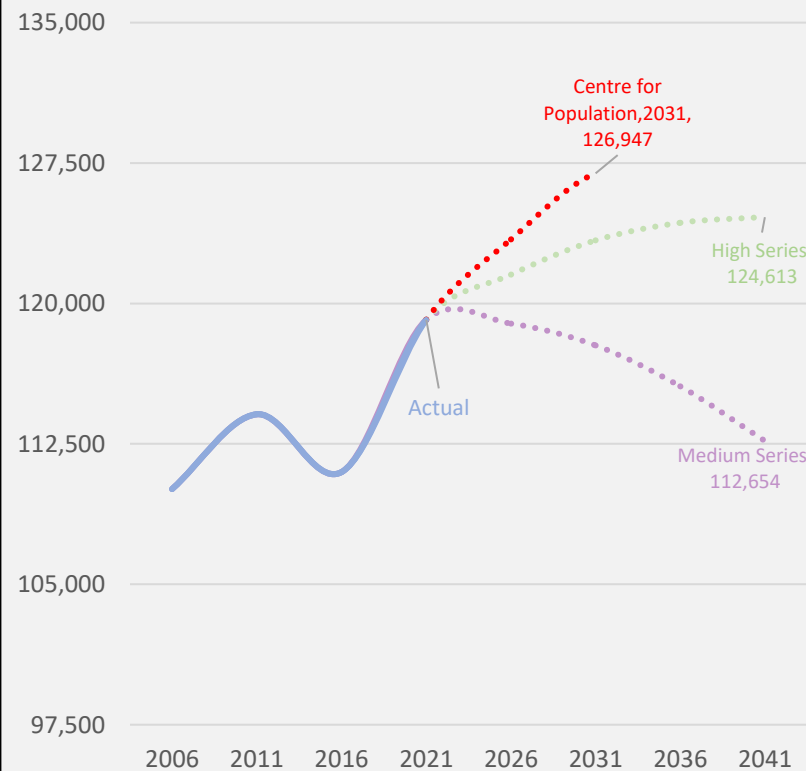
For example in 2026, Treasury projects the Break O'Day population to reach 7 079, which is 1.22 per cent of the total projected population for Tasmania at this time. The Centre for Population projection for Break O'Day is therefore estimated to be 7 188 in 2026 (1.22 per cent of the Centre for Population's projection).

# Population projections – All series – Tasmanian regions

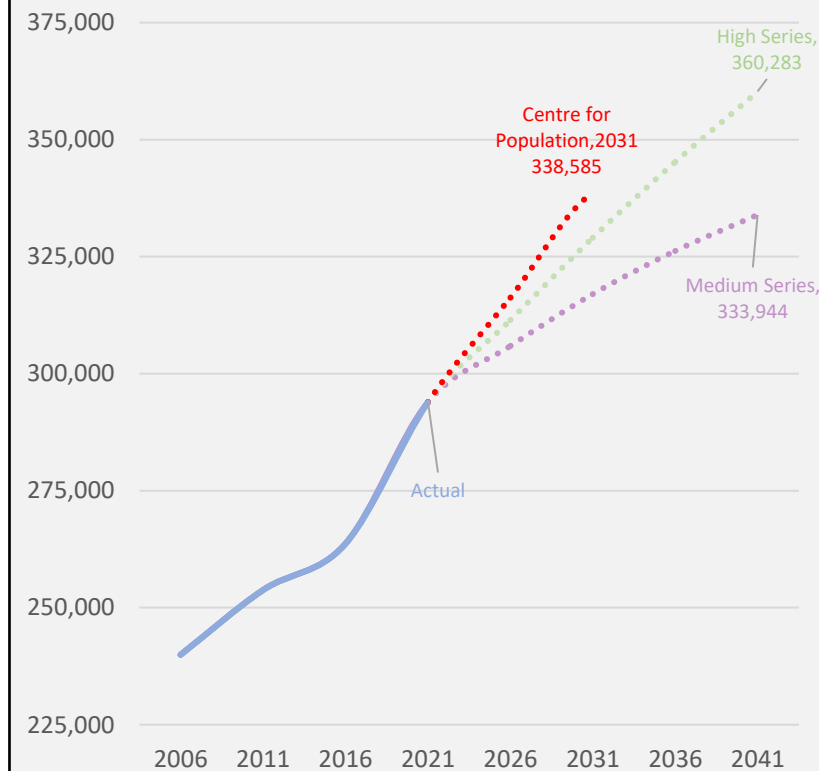
North



North-West



South



# Dwelling Demand Projections

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# Methodologies and sources: Dwelling demand projections

The dwelling demand projections were produced in two parts. The first part used historic Census data to identify the percentage of Tasmanians who lived in different household types and the percentage of those household types that lived in different housing situations. This was then applied to the 2019 Treasury Population Projections to project the dwelling demand at each Census point between 2021 and 2041.

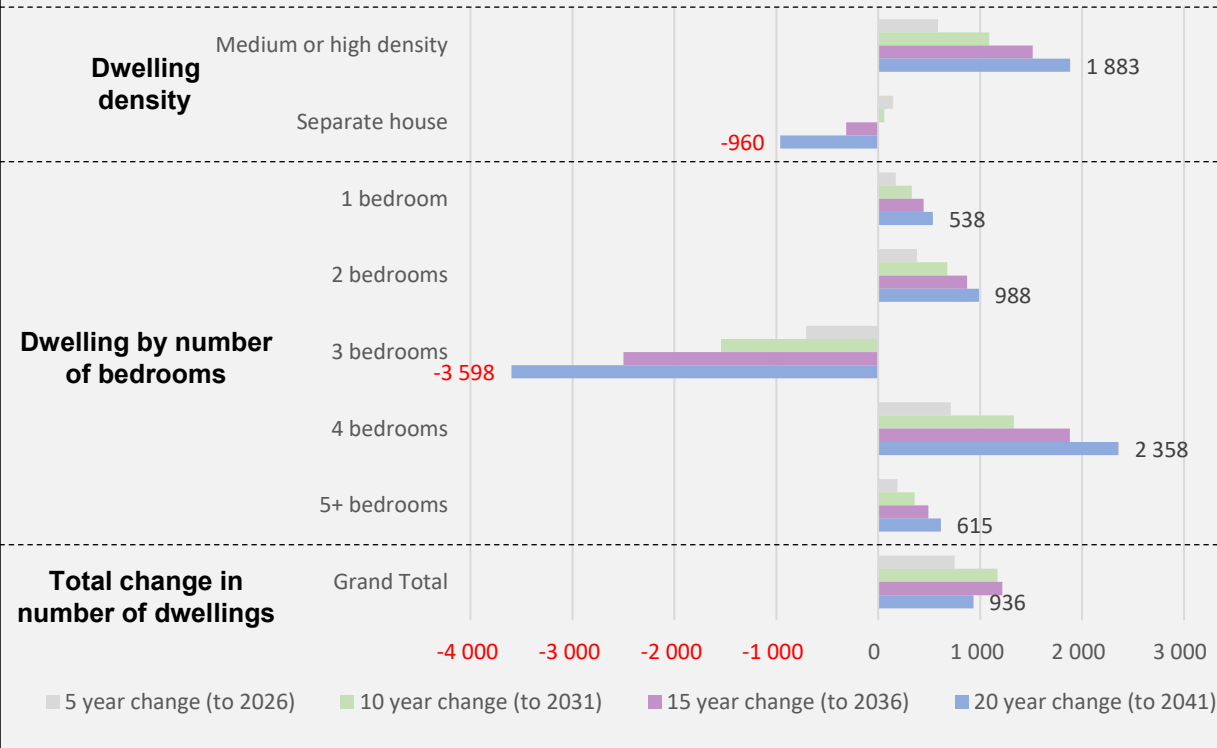
The second part of the projections was undertaken in response to the unexpected and large revision to Tasmania's population estimates in the 2021 Census, which made the previous population projections obsolete. This part was undertaken by revising the start point to reflect the actual outcomes and used the interim population projections published by Treasury in November 2022 to update the previous projections.

# Dwelling demand projections - medium series

## Northern Tasmania

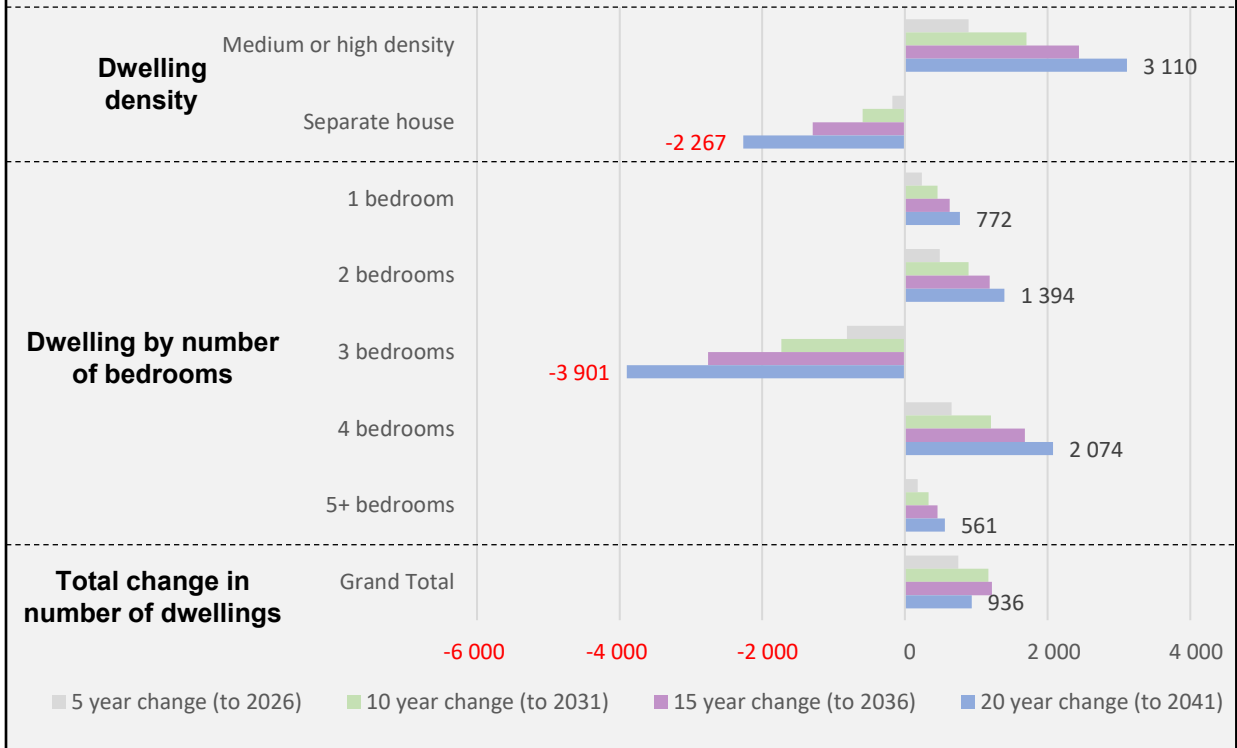
### Scenario: Medium series population | Standard densification trends

Change in dwelling demand by housing type and density over the projection period



### Scenario: Medium series population | Increased densification trends

Change in dwelling demand by housing type and density over the projection period

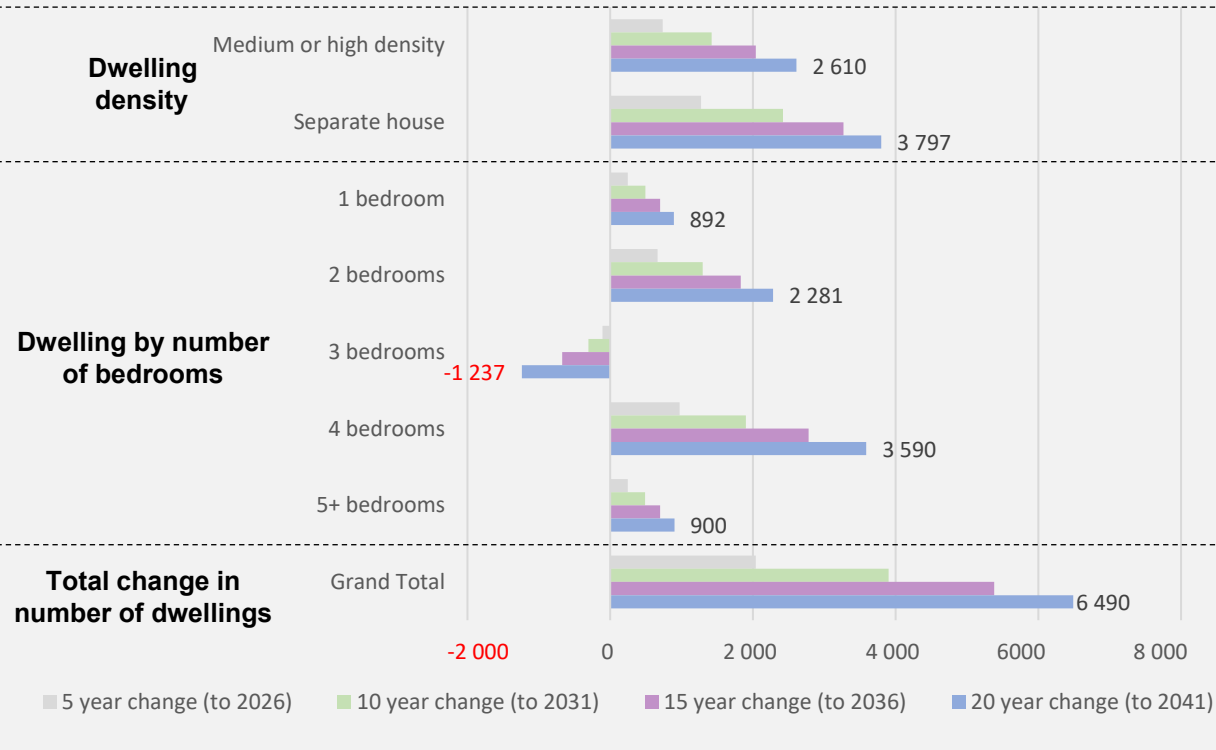


# Dwelling demand projections - high series

## Northern Tasmania

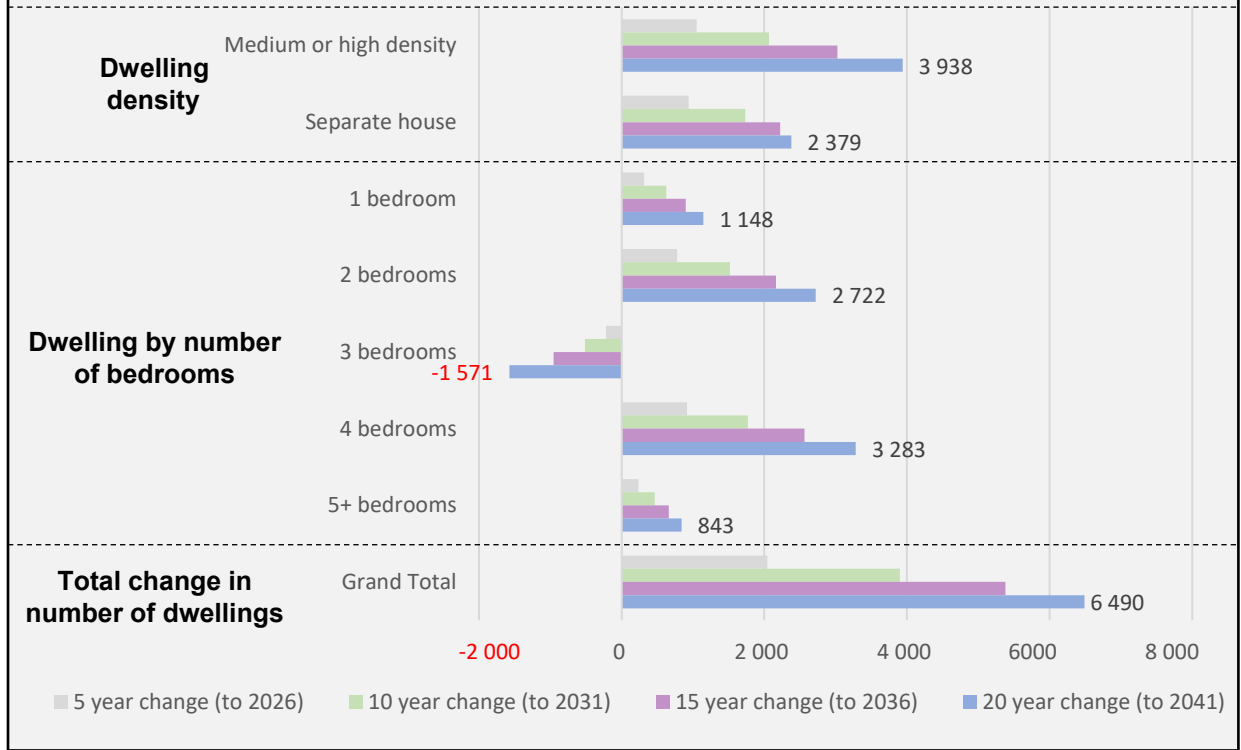
### Scenario: High series population | Standard densification trends

Change in dwelling demand by housing type and density over the projection period



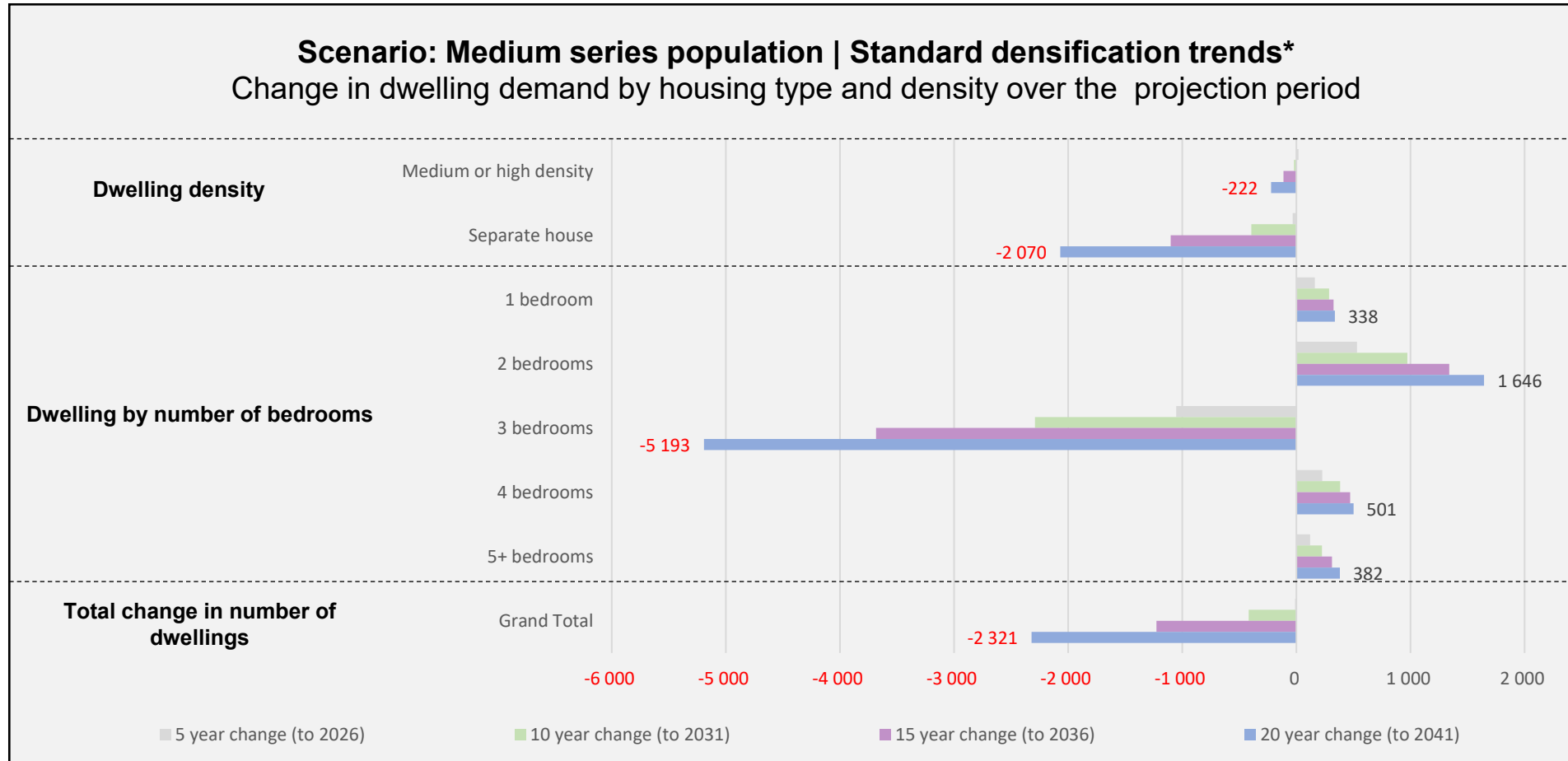
### Scenario: High series population | Increased densification trends

Change in dwelling demand by housing type and density over the projection period



# Dwelling demand projections - medium series

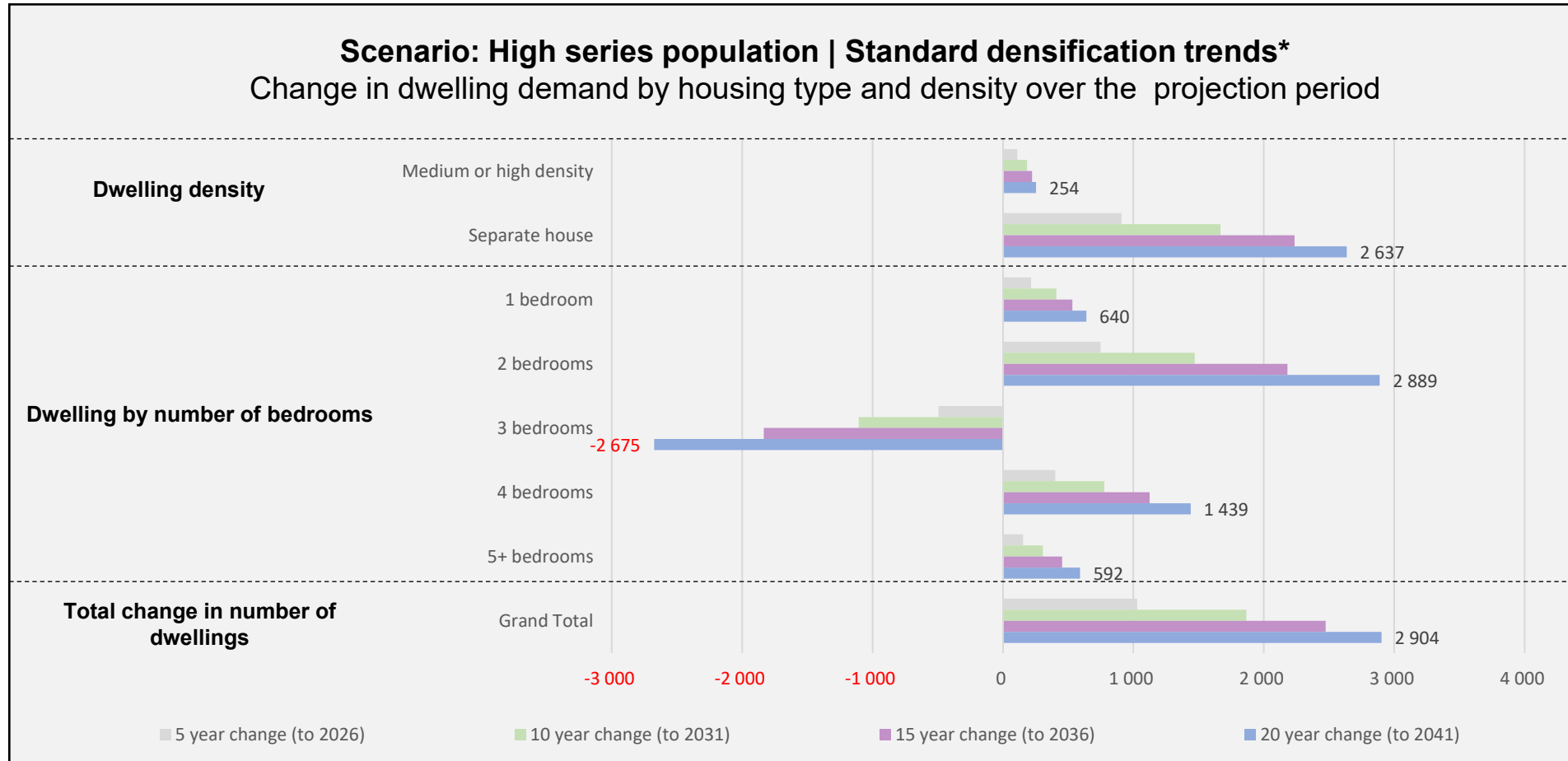
## North-West Tasmania



\* There is no projection for increased densification trends in North-West Tasmania. This projection is not relevant given past trends for the region.

# Dwelling demand projections - high series

## North-West Tasmania



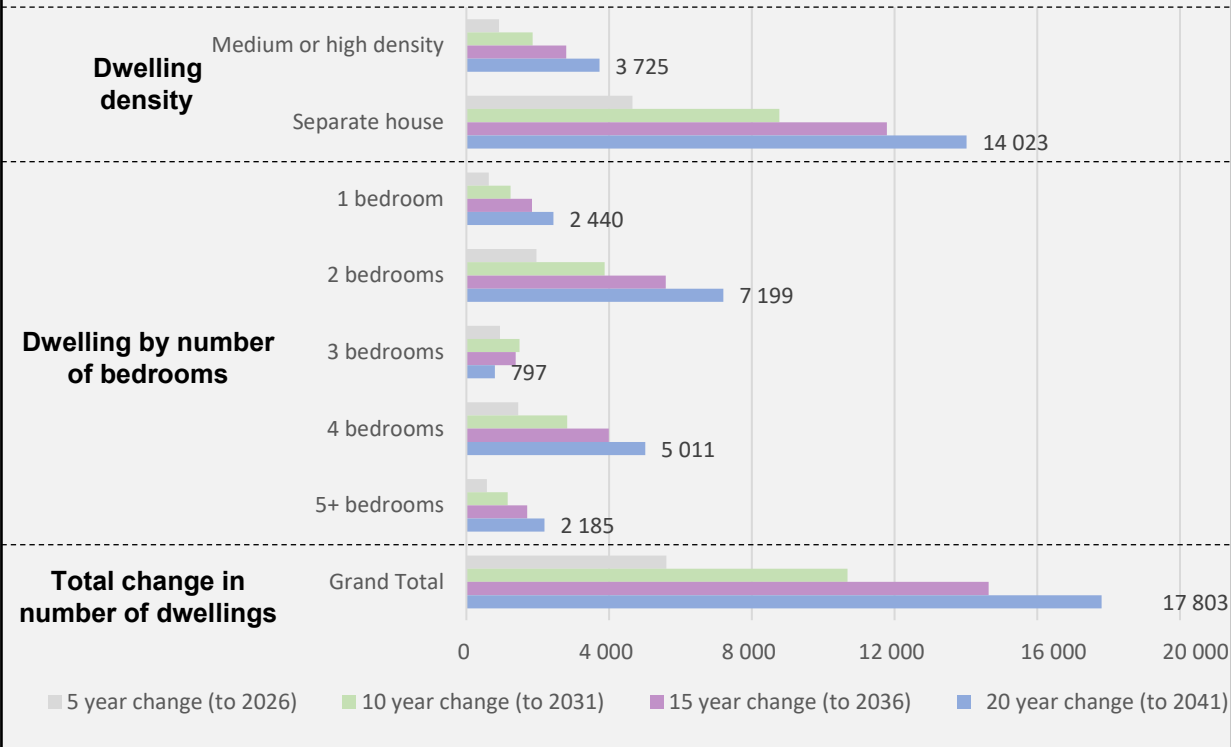
\* There is no projection for increased densification trends in North-West Tasmania. This projection is not relevant given past trends for the region.

# Dwelling demand projections - medium series

## Southern Tasmania

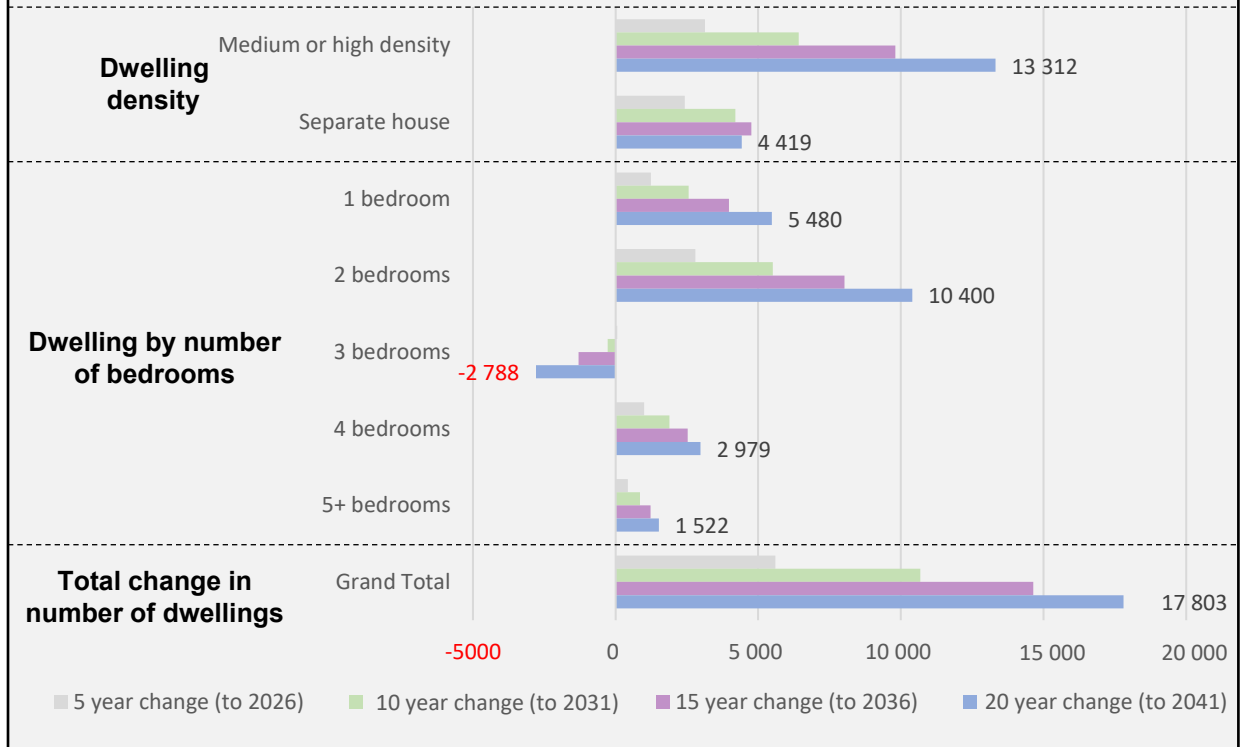
### Scenario: Medium series population | Standard densification trends

Change in dwelling demand by housing type and density over the projection period



### Scenario: Medium series population | Increased densification trends

Change in dwelling demand by housing type and density over the projection period

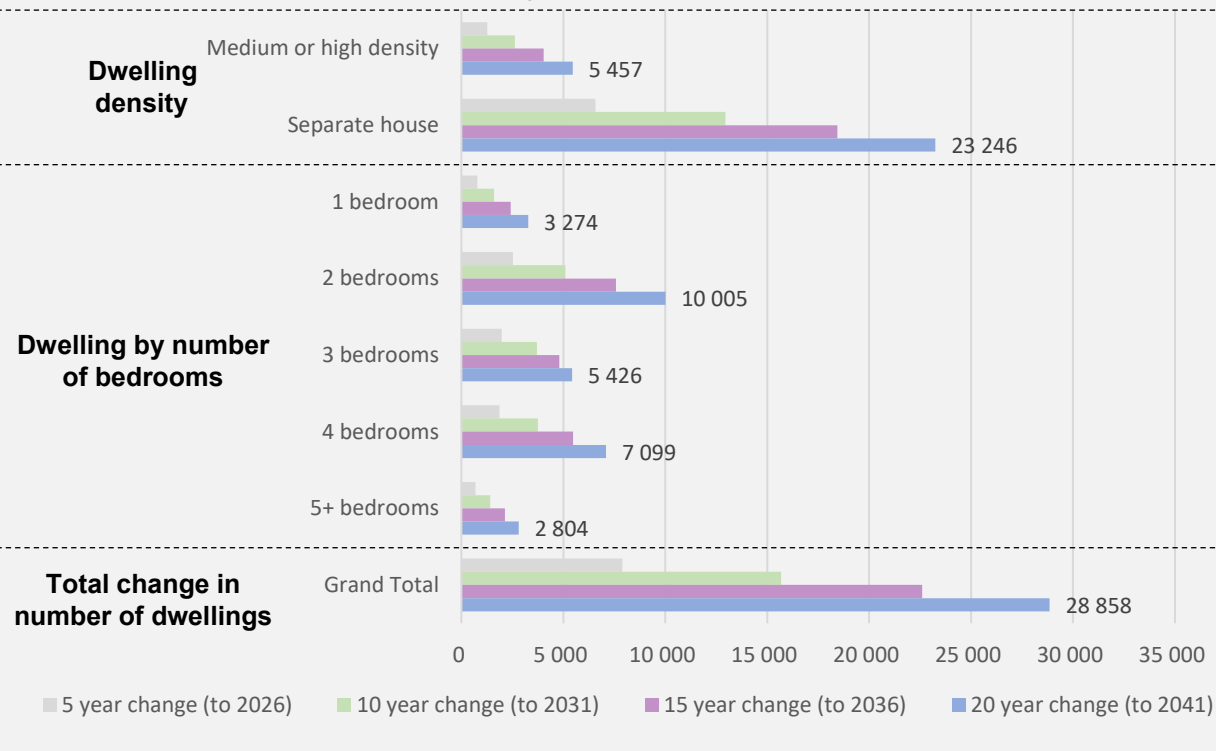


# Dwelling demand projections - high series

## Southern Tasmania

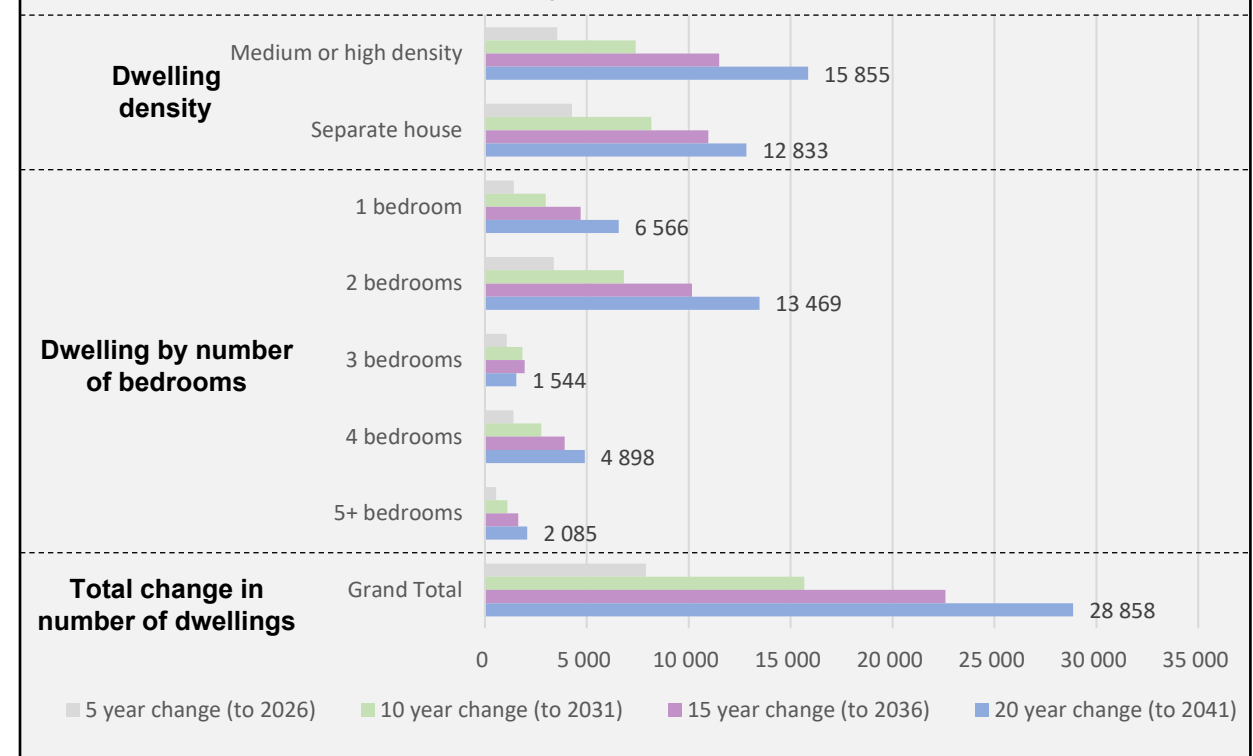
### Scenario: High series population | Standard densification trends

Change in dwelling demand by housing type and density over the projection period



### Scenario: High series population | Increased densification trends

Change in dwelling demand by housing type and density over the projection period



# Social Housing Demand Projections

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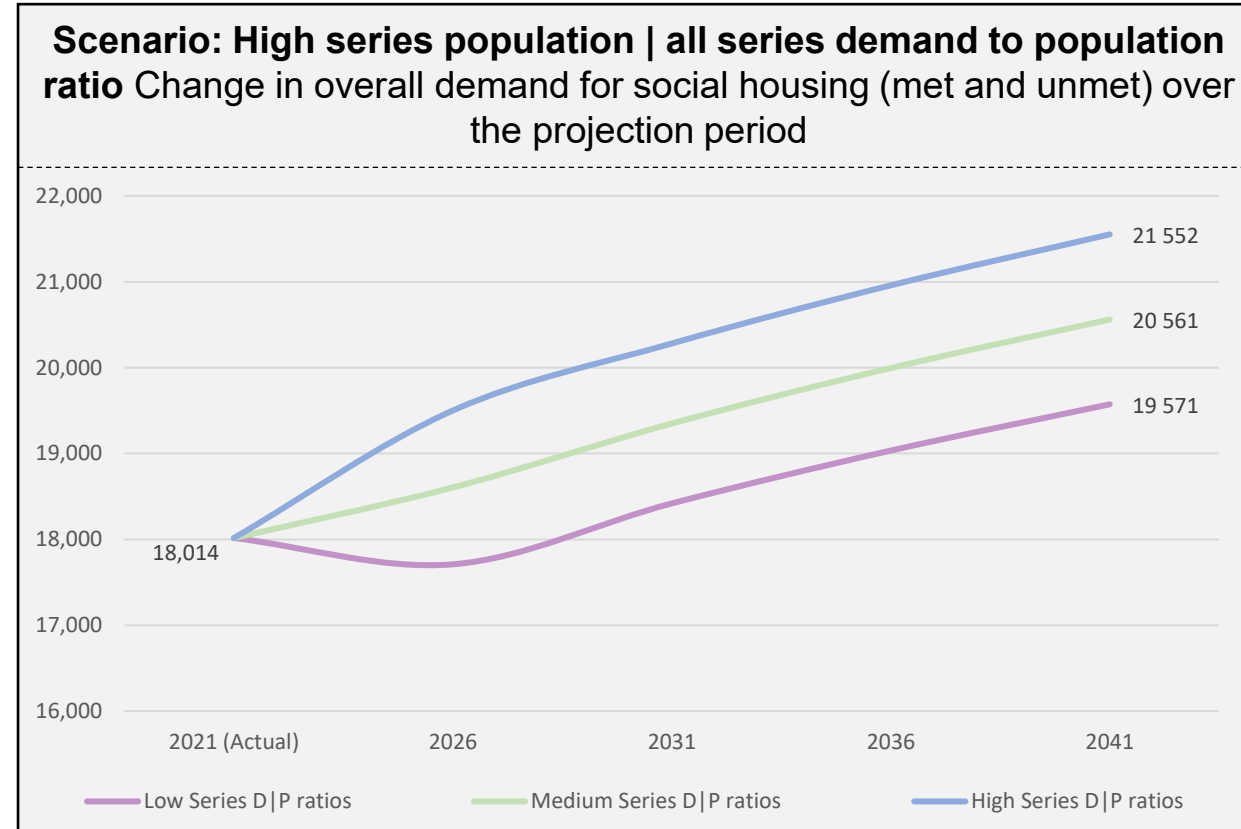
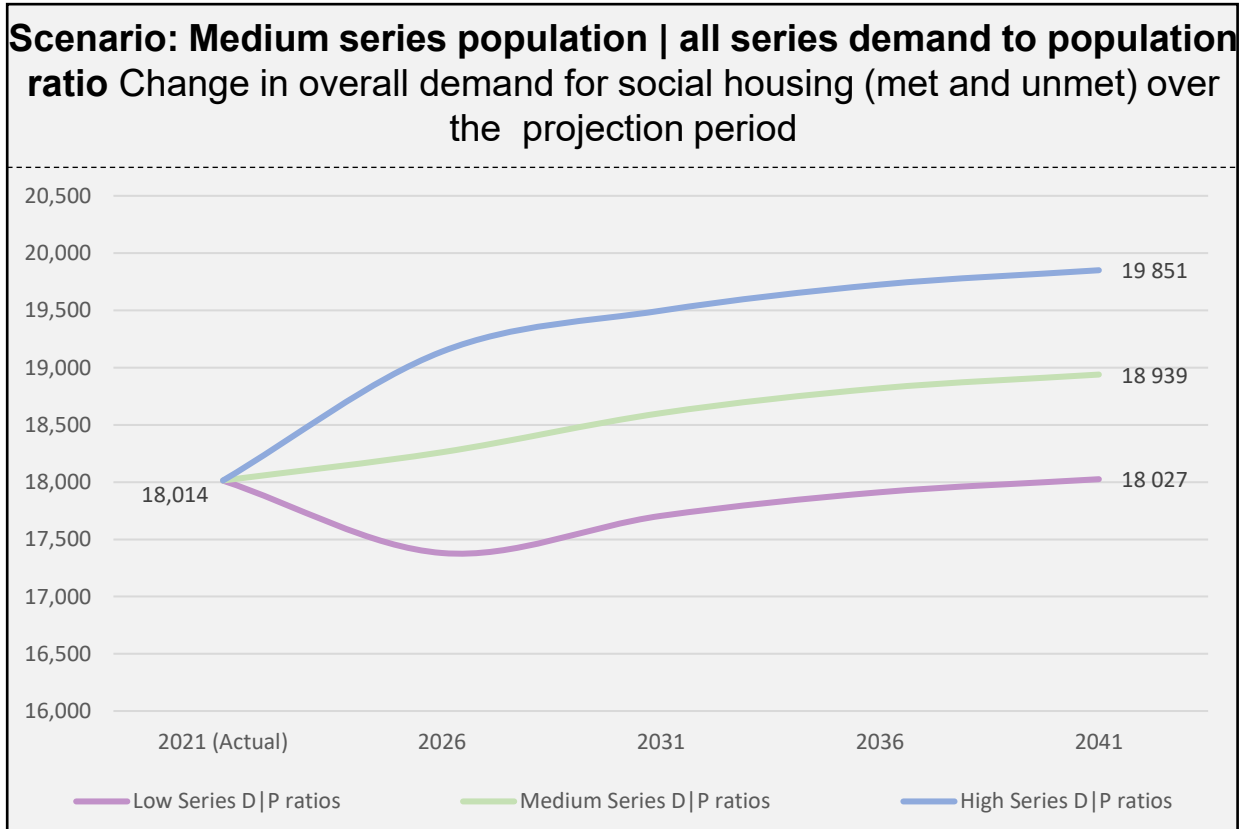


# Methodologies and sources: Social housing demand projections

The social housing demand projections used historic data to calculate the total met and unmet demand for social housing and divided this by the total population of Tasmania. This provided results showing the proportion of the population that were seeking social housing (either met or unmet) at a given point in time and the mean and standard deviation of these results showed the range for these demand to population ratios.

Three scenarios for demand to population ratios (low, medium and high) were then applied to the medium and high series interim population projections published by Treasury in November 2022 to show the projected total demand for social housing across the projection period.

# Social housing demand projections – medium and high series



\* These projections take into account demand only and include both met social housing demand (households in social housing) and unmet social housing demand (applicants on the social housing register) in the total.

\*\* These projections are only available at the state wide level

# Low Income Rental Stress Projections

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# Methodologies and sources: Low-income households rental stress projections

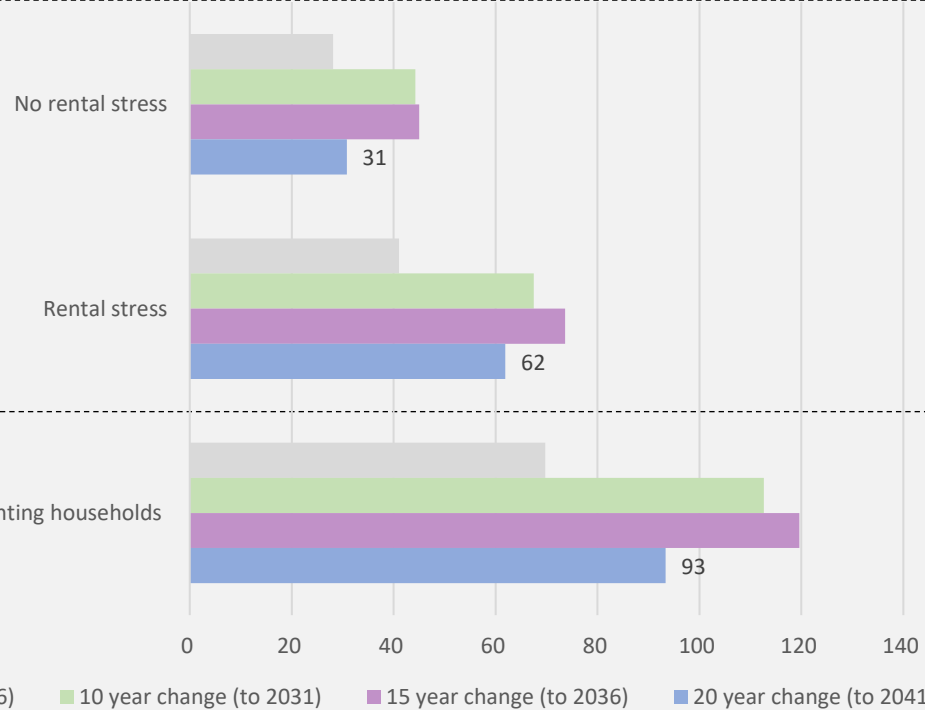
The low income households in rental stress projections were produced using historical ABS Census data from the past three Censuses to calculate the proportion of low income households in each Tasmanian LGA that was in rental stress at the time of the census. Rental stress is defined as when the household's rental costs were greater than 30 per cent of their household income. Low income households were identified by considering only those households in the bottom two quintiles for household income (the bottom 40 per cent of households incomes).

The results of this analysis were then applied to the medium and high series of the interim population projections published by Treasury in November 2022 to show the projected number of low income households in rental stress across the projection period if these proportions continued at the same rate.

# Low-income households rental stress projections - All series – Northern Tasmania

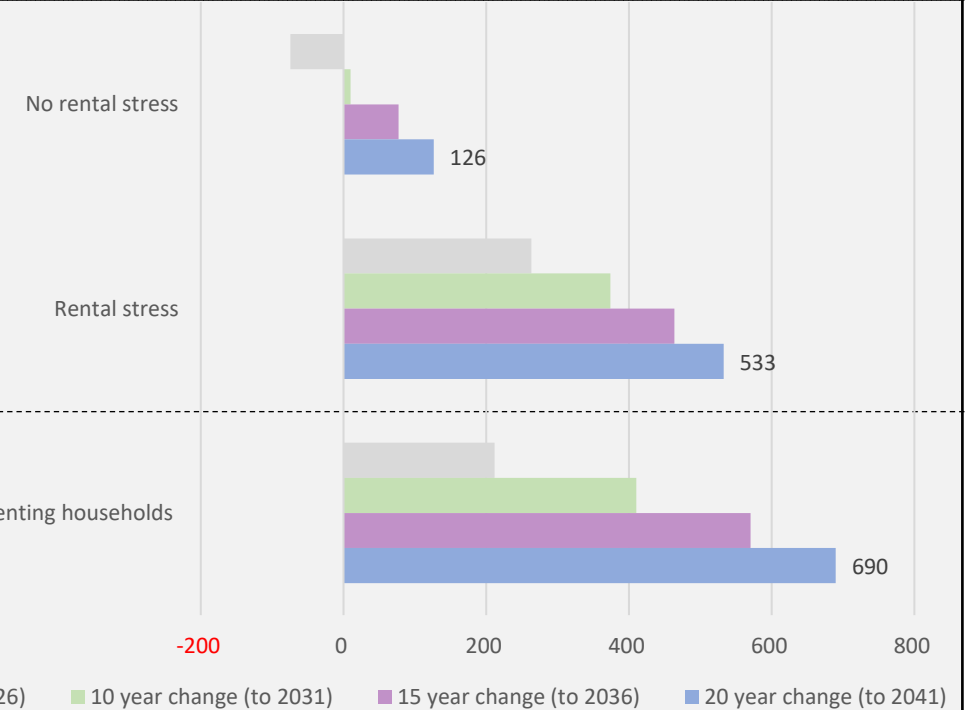
## Scenario: Medium series population

Change in dwelling demand by housing type and density over the projection period



## Scenario: High series population

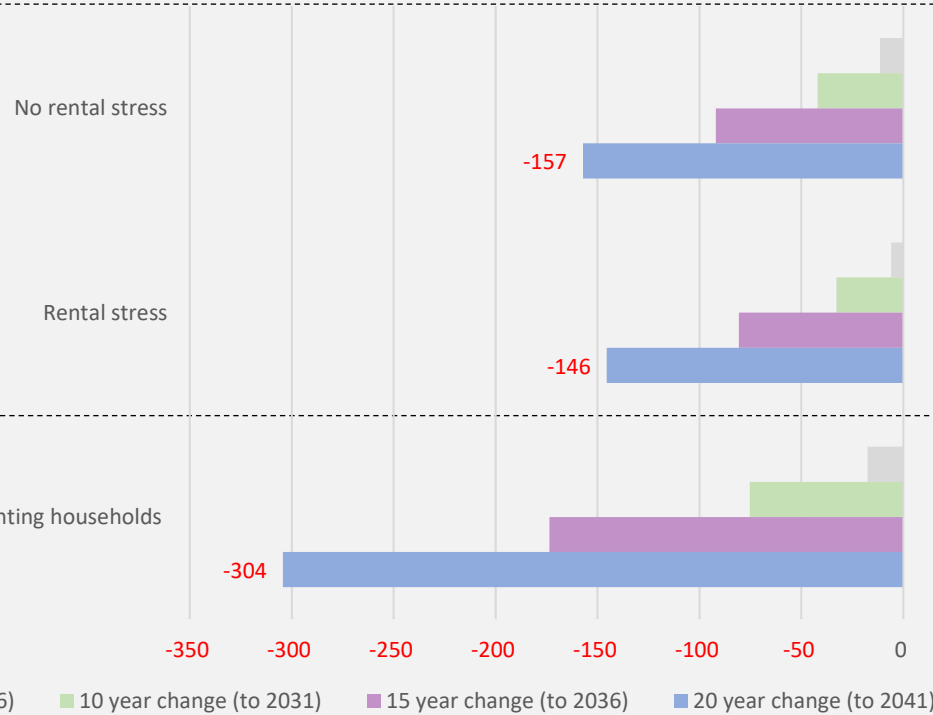
Change in dwelling demand by housing type and density over the projection period



# Low-income households rental stress projections - All series – North-West Tasmania

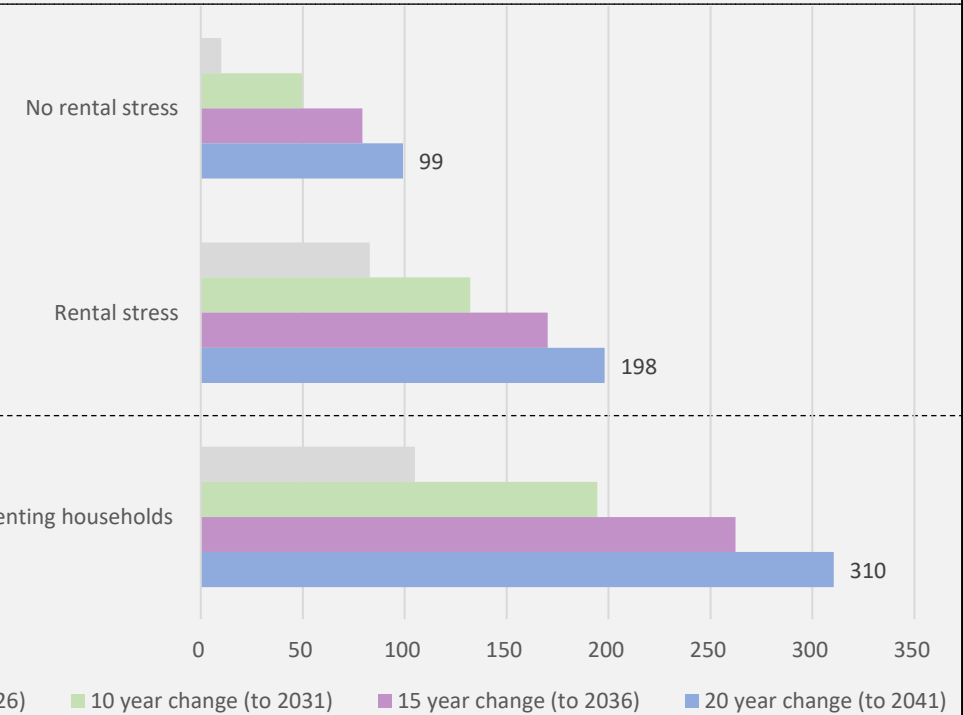
## Scenario: Medium series population

Change in dwelling demand by housing type and density over the projection period



## Scenario: High series population

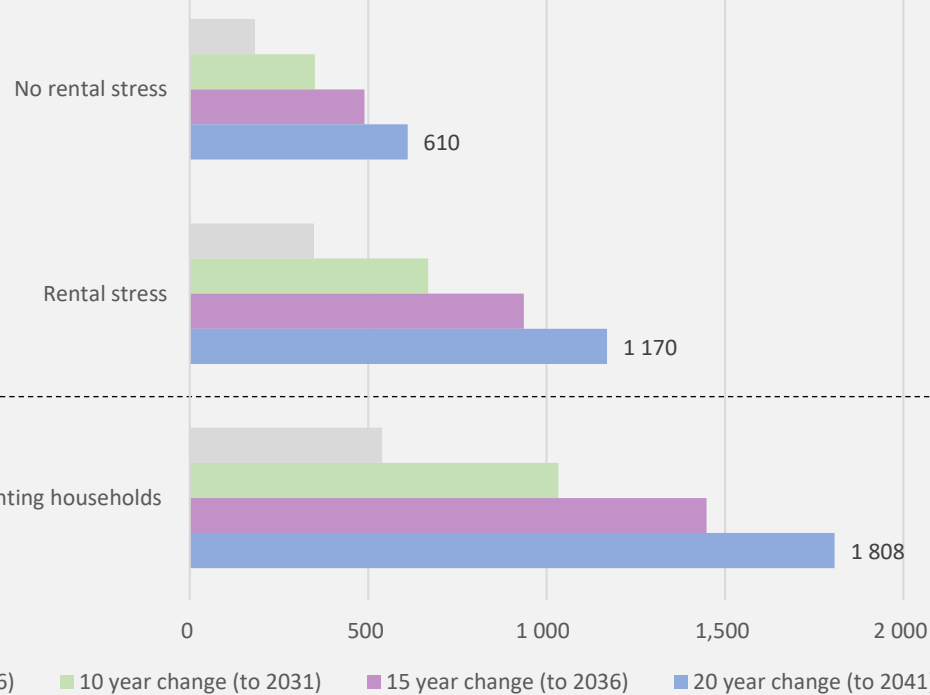
Change in dwelling demand by housing type and density over the projection period



# Low-income households rental stress projections - All series – Southern Tasmania

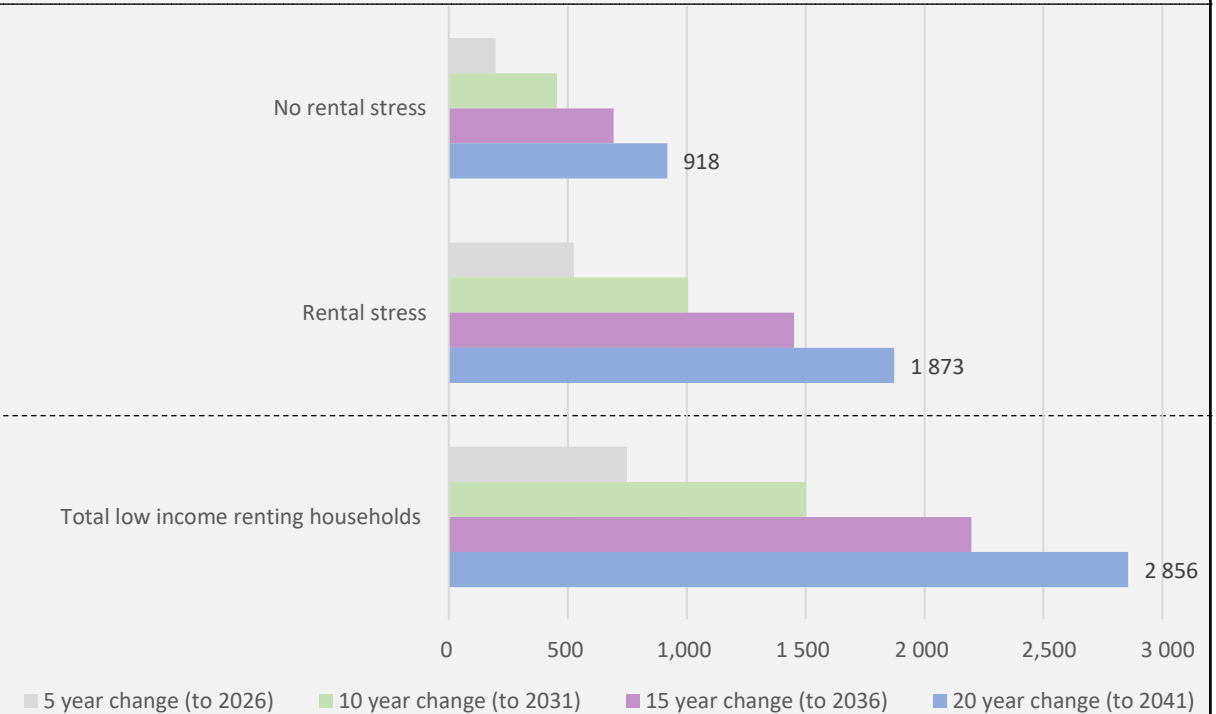
## Scenario: Medium series population

Change in dwelling demand by housing type and density over the projection period



## Scenario: High series population

Change in dwelling demand by housing type and density over the projection period



# Low Income Tenure Type Projections

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# Methodologies and sources: Low-income households tenure type projections

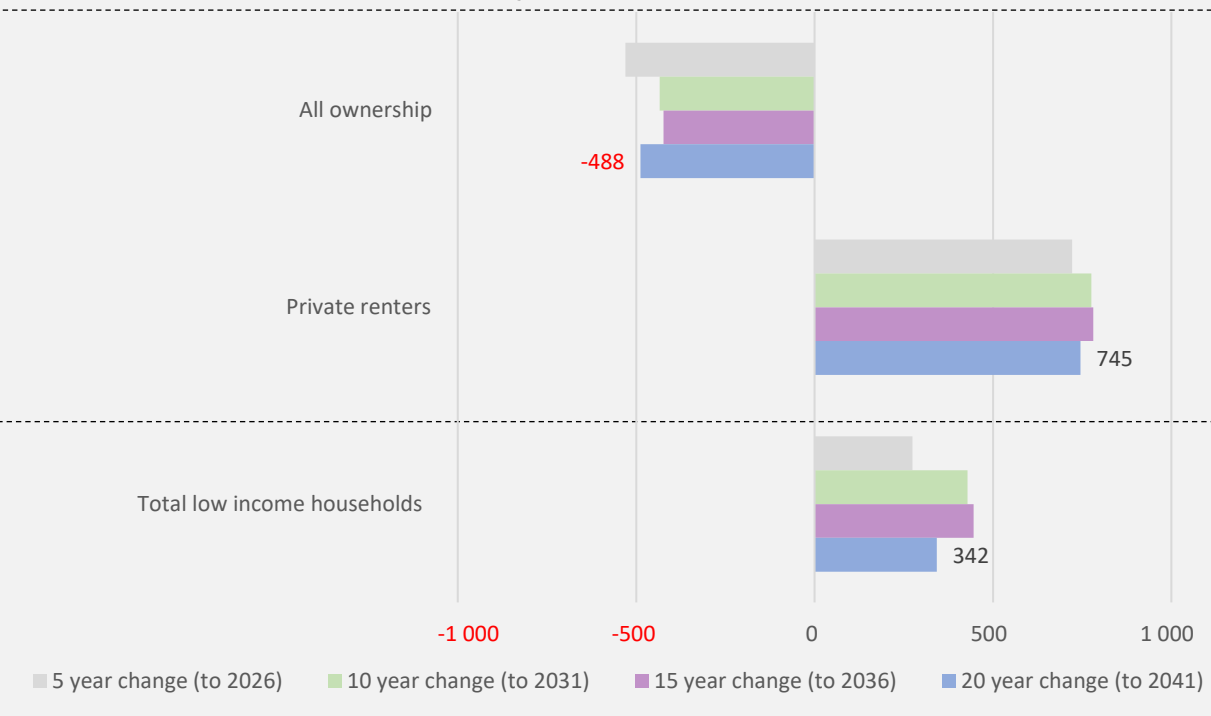
The low income households by tenure type projections were produced using historical ABS census data from the past three census' to calculate the proportion of low income households in each Tasmanian LGA that were in different household tenure types at the time of the census. The three main household types considered were owning with a mortgage, owning without a mortgage and those in private rentals. Low income households were identified by considering only those households in the bottom two quintiles for household income (the bottom 40 per cent of households incomes).

The results of this analysis were then applied to the medium and high series of the interim population projections published by Treasury in November 2022 to show the projected number of low income households in rental stress across the projection period if these proportions continued at the same rate.

# Low-income households tenure type projections - All series – Northern Tasmania

## Scenario: Medium series population

Change in dwelling demand by housing type and density over the projection period



## Scenario: High series population

Change in dwelling demand by housing type and density over the projection period

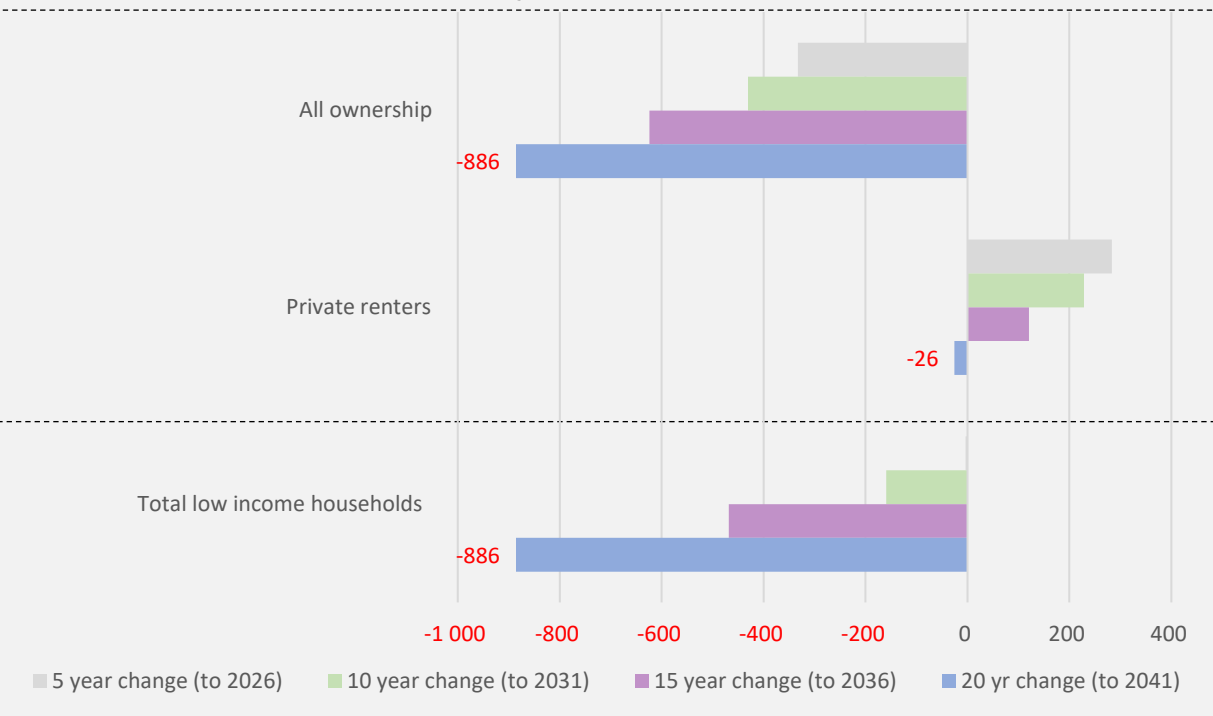


\*There is an additional category called 'other' that has been excluded from these graphs as these numbers do not provide meaningful information. This (and the affect of rounding) means that total numbers may not equal.

# Low Income Households Tenure Type Projections - All Series – North-West Tasmania

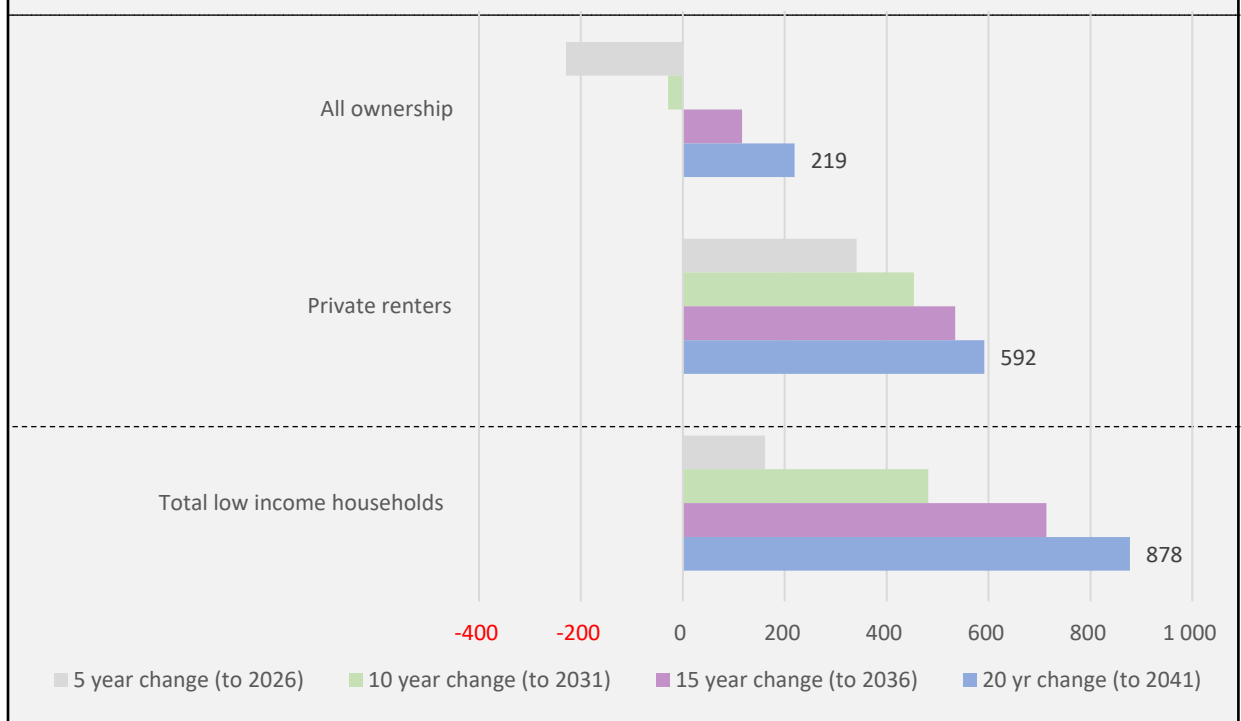
## Scenario: Medium series population

Change in dwelling demand by housing type and density over the projection period



## Scenario: High series population

Change in dwelling demand by housing type and density over the projection period



\*There is an additional category called 'other' that has been excluded from these graphs as these numbers do not provide meaningful information. This (and impacts by rounding) means that total numbers may not equal.

# Low Income Households Tenure Type Projections - All Series – Southern Tasmania

## Scenario: Medium series population

Change in dwelling demand by housing type and density over the projection period



## Scenario: High series population

Change in dwelling demand by housing type and density over the projection period



\*There is an additional category called 'other' that has been excluded from this graphs as these numbers do not provide meaningful information. This (and the affect of rounding) means that total numbers may not equal.

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