CITY OF
**TEA TREE GULL**
*Naturally Better*

# State of
# the City
## 2023

# Contents

# Introduction

The City of Tea Tree Gully is located in Adelaide's north-eastern suburbs. The City has a total land area of 92.5 square kilometres and is a predominantly residential area. Areas in the west of the city comprise established and newly developed residential suburbs, while in the City's east, the hills interface zone provides a rural backdrop. The north-east of the City includes an established extractive industry area as well as the catchment area of the Little Para Reservoir.

# State of the City 2023

The State of the City Report has been prepared to assist Council to understand its local community better. The report will be used to inform future planning for the CTTG including Council's Strategic Plan 2030. It provides a snapshot in time and brief analysis of developing trends that have the potential to impact Council's operations, asset management, planning and delivery of services.

The report is divided into three sections:

- Our community

- Our environment

- Our economy

These sections include summary data relating to each theme and also include some notable trends observable from the data.

# Our
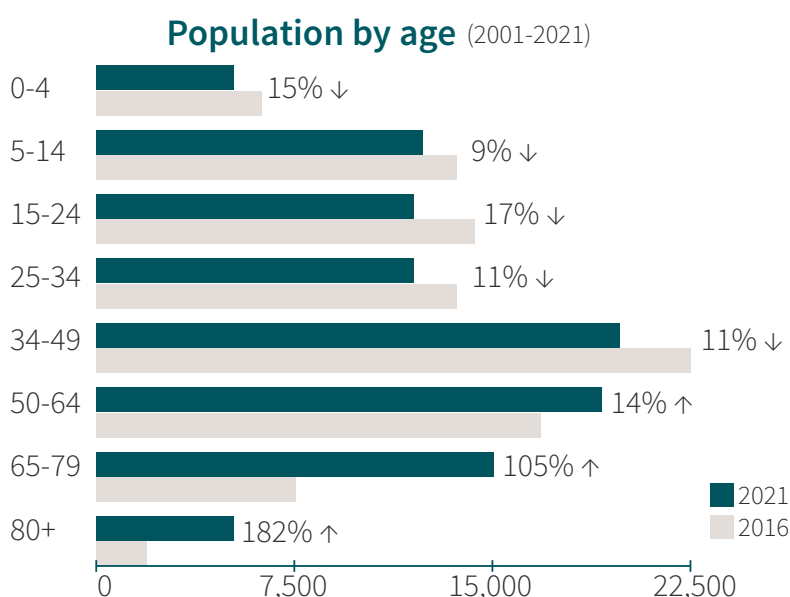# Community

# Population and Age

The age structure of the City provides key insights into the level of demand for age–based programs and services. It is an indicator of the City's residential role and function and helps us to understand how this is likely to change in the future.

The estimated resident population of the City at the 2021 Census, was 102,067, a slight increase (+279 residents) from the year before. Historically, the growth of the City's population has changed significantly since the early 1990s. There was a slight population boom between 1991 and 2001 of 11,571 additional people, bringing the total population to 95,540. However the population declined slightly from 2001 to 2011 down to 94,225 in 2011.

The city is currently growing at an annualised rate of 0.4% per year. While the population is forecast to increase over the next 20 years, the population growth rate is predicted to slow.

The aging population trend is continuing, with 26.5% of the community 60 years or older. The number of residents in the elderly age group (80+) is forecast to have the greatest increase over the next 20 years.

The median age of the population of the City of Tea Tree Gully is 42 which is broadly consistent with the South Australian median age (41) but higher than the median for the northern Adelaide region (36).

## Population by age (2001-2021)

| Age | Change |
|-----|--------|
| 0-4 | 15% ↓ |
| 5-14 | 9% ↓ |
| 15-24 | 17% ↓ |
| 25-34 | 11% ↓ |
| 34-49 | 11% ↓ |
| 50-64 | 14% ↑ |
| 65-79 | 105% ↑ |
| 80+ | 182% ↑ |

■ 2021
▫ 2016

0    7,500    15,000    22,500

**CTTG population** (2021)

# 102,666

**Annualised increase**
(2012-2021)

# 0.4% ↑

**Median age** (2022)

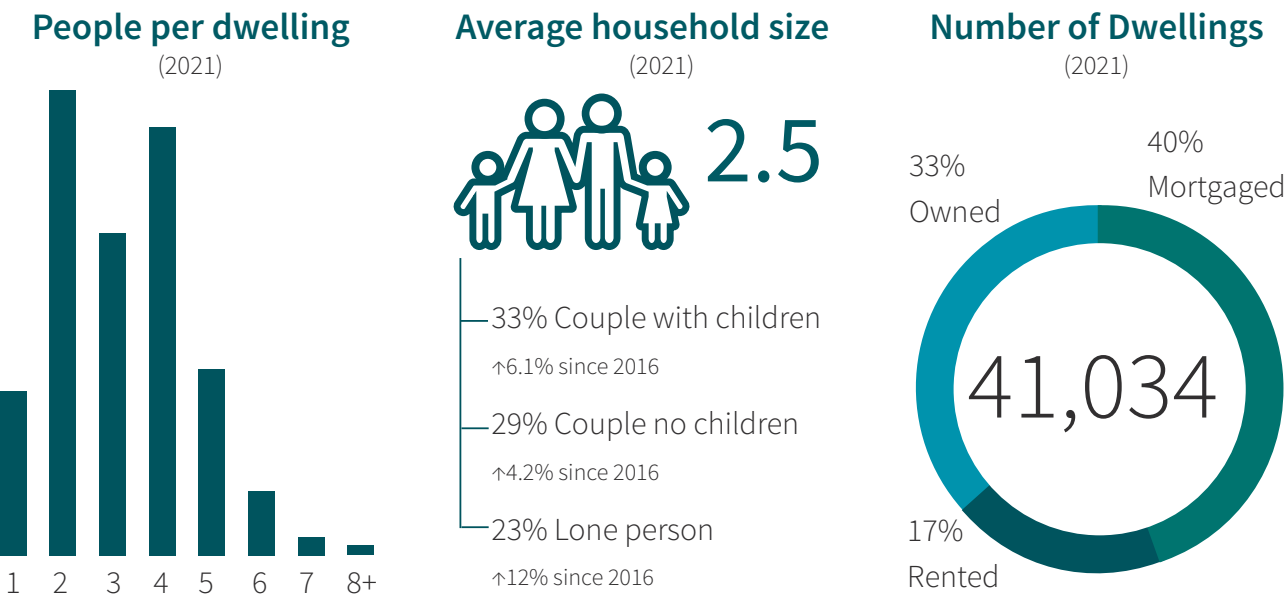# 42 years

# Household and Families

Household and family structure is an important demographic indicator as it can provide insights into the level of demand for services, infrastructure, and facilities.

A family is defined by the ABS as two or more people, one who is at least 15 years of age, who are related by blood, marriage (registered or de facto), adoption, step or fostering, and who are usually residents of the same household. A household is the count of the total number of people who are living in the same dwelling, and can include multiple families or people not related to each other.

At 2021, there were 17,340 families within the City. Two-person families account for almost half of the family types (48%) with three and four person families 22% and 21% respectively.

The number of households in the Tea Tree Gully region is forecast to increase from 38,683 in 2016 to 40,255 in 2041, with the largest household type forecast to be 'couple only'. The average household size has decreased slightly over time, with family households decreasing and lone person households increasing.

The area within Tea Tree Gully that is forecast to experience the largest increase is the Southern Area (comprising Dernancourt, Hope Valley, Higbury and Paracombe) which is expected to increase by 1,028 households from 6,567 in 2021 to 7,595 by 2046, this represents 21.52% of Tea Tree Gully's household growth.

## People per dwelling
(2021)

1  2  3  4  5  6  7  8+

## Average household size
(2021)

2.5

33% Couple with children
↑6.1% since 2016

29% Couple no children
↑4.2% since 2016

23% Lone person
↑12% since 2016

## Number of Dwellings
(2021)

33% Owned

40% Mortgaged

41,034

17% Rented

# Dwelling Types and Suitability

Development trends regarding the diversity of dwelling types can be used to monitor changes in housing stock and changing demands for housing. Housing suitability considers the relationship between household type and the number of bedrooms. It can be used an indicator of the extent to which the current housing stock is meeting the needs of the resident population.
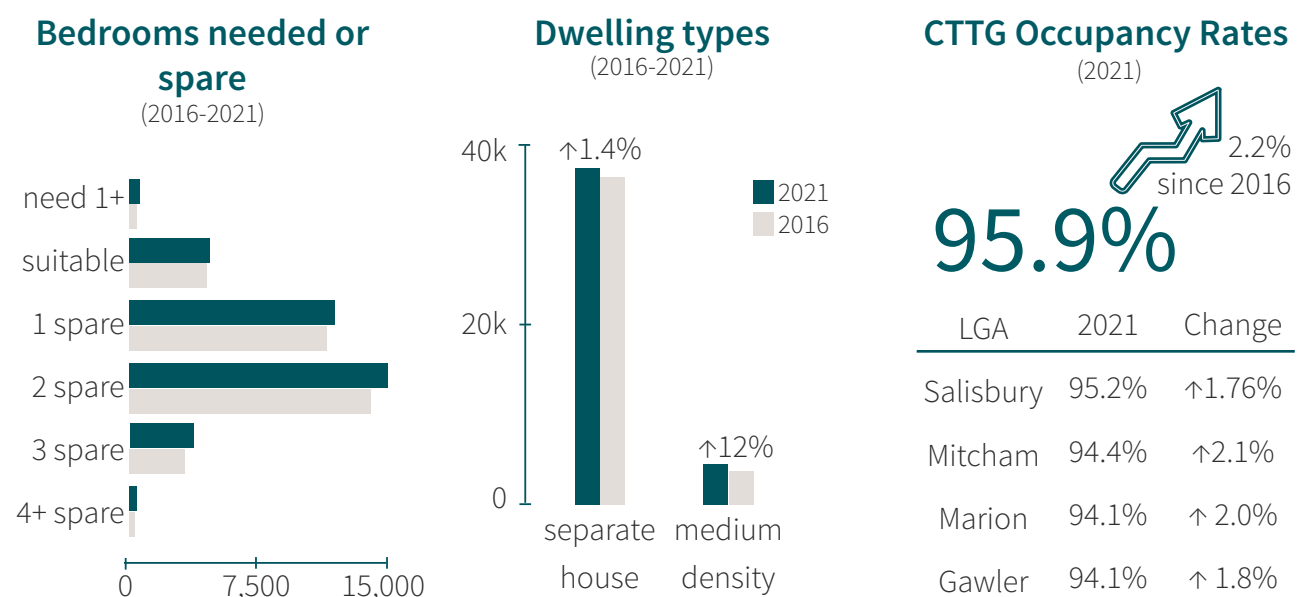
Separate houses are the most common housing type in the City of Tea Tree Gully. Medium density housing has shown the greatest growth, however the total percentage of medium density housing remains low.

The observed change in household composition has a flow on effect on the demand for different housing types. Whilst separate houses are the most common housing type, lone persons and couple families with no children are the most common household types in medium density dwellings.

Given these household compositions are increasing it is likely that demand for a variety of housing choice, in particular medium density housing is also likely to increase.

Tea Tree Gully has the highest occupancy rates in the state, with 95.9% of all dwellings being occupied on Census night.

In 2021 there were 507 residential property rentals including detached houses, units and townhouses in Tea Tree Gully. The majority of these rentals were detached houses (88%). Residential rentals peaked in 2018 with 710 rentals.

## Bedrooms needed or spare
(2016-2021)



## Dwelling types
(2016-2021)



## CTTG Occupancy Rates
(2021)

↗ 2.2% since 2016

### 95.9%

| LGA | 2021 | Change |
|---|---|---|
| Salisbury | 95.2% | ↑1.76% |
| Mitcham | 94.4% | ↑2.1% |
| Marion | 94.1% | ↑ 2.0% |
| Gawler | 94.1% | ↑ 1.8% |

# Housing affordability

Housing data is a measure of the economic desirability of living in the City. Housing affordability and levels of housing stress can assist in determining the financial wellbeing of our residents

For the purposes of evaluating Census data, affordable housing is defined by applying a 30% of household income principle. Housing affordability data includes property market sales transactions and rental listings. In 2015 there were 1,164 affordable dwellings sold in Tea Tree Gully, 65% of all dwellings sold. By 2021 this had decreased to 1,071 (56%) affordable dwellings sold.

In 2015 there were 329 affordable rentals in Tea Tree Gully, representing 72% of all rentals. This increased to 432 affordable rentals in 2021 or 85% of all rentals.

A household experiences housing stress when the cost of housing (either as rent or mortgage repayments) is more than 30% of their income.

In Tea Tree Gully, there were 4,909 dwellings in housing stress (12%). This is across all dwellings regardless of tenure (e.g. rented, mortgaged etc.) Of these households experiencing stress, 40.2% of rental properties are experiencing stress compared with 12.5% of mortgaged properties. The Holden Hill area had the highest level of mortgage stress (15.1%) whilst Modbury North Area had the highest level of rental stress (43.3%).

**Median house price**
(2021)

33% since 2015

$618,000

**Households experiencing household stress**
(2021)

12%

**Median weekly rent repayment**
(2021)

SA Median $375

$460

# Education

Education and employment are important indicators of socio-economic status. The level of education and employment in the community help to evaluate economic opportunities and suggest the strength of the local economy and social characteristics of the population
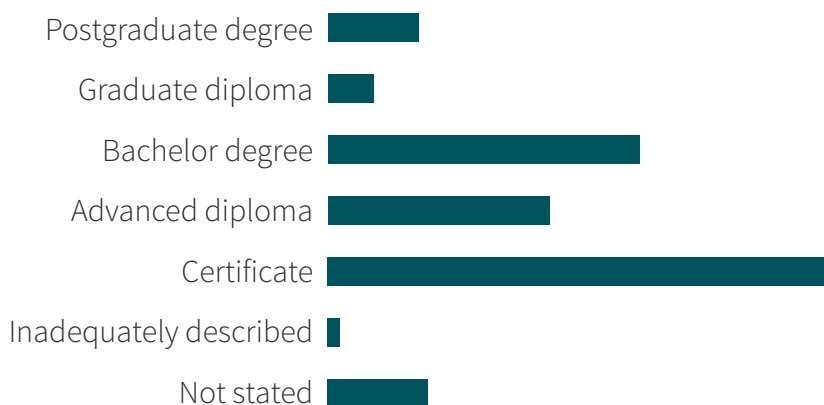
There has been a 5% increase in population with tertiary education to 51% of the population which is slightly higher than the South Australian average (48%). Additionally the percentage of the population who had completed year 12 has increased by 15% from 2016. 0.4% of the population over 15 years old did not attend school.

In 2021, 25.7% of 15-24 year olds were engaged in education, and 32% were engaged in employment. 35.7% were engaged in both education and employment, and 6.7% were not engaged in education or employment.

**51%** ↑5% since 2011
**of our population has a tertiary qualification**
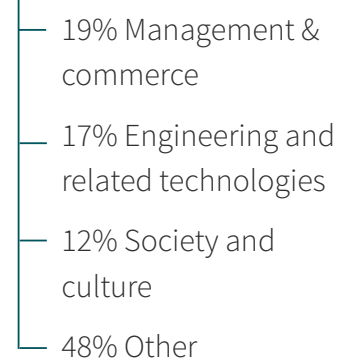
## Highest level of study
(2021)



Postgraduate degree
Graduate diploma
Bachelor degree
Advanced diploma
Certificate
Inadequately described
Not stated

## Field of Study
(2021)

**26,594** students

— 19% Management & commerce

— 17% Engineering and related technologies

— 12% Society and culture

— 48% Other

# Income and Wealth

Income and wealth are important indicators of socio-economic status in the City. This data reveals economic opportunities and areas of disadvantage in the community. Long-term trends can signify how the local economy is faring and provide important forecasts for socio-economic health.

The median weekly household income in 2021 was $1635, and the median weekly mortgage repayment was approximately $380 which equates to approximately 23% of a households weekly income. This data is from the 2021 Census, and it is expected that this percentage has increased since then due to interest rate rises and the changing housing market.

Whilst the medium weekly household income has increased over time, 25% of residents earn less than $400 per week placing them below the poverty line. It is noted that this is a count of all residents aged over 15, and thus may capture dependent children who are studying and not employed.

Approximately 6.7% of our youth are considered to be disengaged, that is neither employed nor studying.

The number of aged pension recipients is increasing, which correlates with our aging population. 1.3% of City of Tea Tree Gully population receive an aged pension compared to 1% South Australia Wide.

**Median weekly household income**
(2021)

31% since 2015

$1,635

**Residents earning less than $400 per week**
(2021)

25%

**Aged pension recipients**
(2021)

400 people since 2015

13,817

# Migration

Together with births and deaths, migration is a major component of population change for the City. The movement of people into and out of the City directly influences the characteristics of the population and demand for services and facilities.

17,918 of the population who previously resided in the City of Tea Tree Gully at the 2016 Census now have a different place of usual residence. That is around 18% of the total population that have migrated out of the City. The highest percentage of people leaving the City is in the 20-50 year age bracket.

Natural change (births less deaths) contributes more to population growth than net migration. This is consistent with the observation that a large portion of the population is aging in place which will be a continuing strategic challenge for The City of Tea Tree Gully as we strive to provide adequate services and support for our community.

## Migration away from CTTG 2016-2021

### 18%
Of the population have relocated outside of CTTG

| 0-14 | 15-29 | 30-44 | 45-64 | 65-79 | 80+ |
|------|-------|-------|-------|-------|-----|
| 2,313 | 5,157 | 5,004 | 3,670 | 1,417 | 352 |

# Cultural and Linguistic Diversity

Identifying languages other than English which people speak at home, provides insights into migration and the cultural groups in our communities. Council can apply language data to guide community engagement and to assist in the delivery of relevant programs and services.

Of our residents counted in the 2021 Census:

- 82.3% speak English at home
- 1.6% speak Punjabi at home
- 1.4% Italian at home.

The percentage of people who speak English at home has decreased by 5% over the past 10 years.
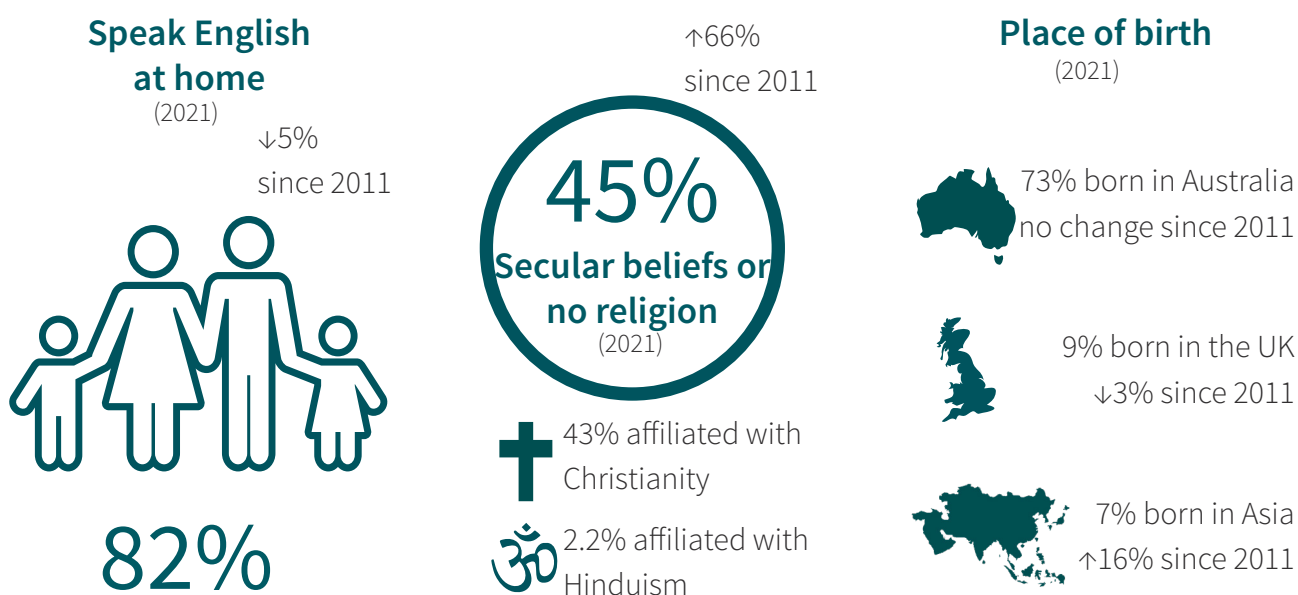
The percentage of people born in Australia has remained steady over the past 10 years, however the percentage of people born in the UK has decreased by 3% whilst the percentage born in Asian countries, and particularly from India has increased.

The percentage increase in first nations people residing within TTG has increased by over 30%.

Religious affiliation provides insights into the cultural diversity of our communities. The top three religious affiliations were:

- Secular Beliefs and Other Spiritual Beliefs and No Religious Affiliation (45.1%)
- Christianity (43.3%)
- Hinduism (2.2%)

The percentage of people affiliated with Christian has decreased, however the percentage of people who identify as having no religion has increased significantly. Whilst there has been a high percentage increase in people affiliated with other religions (including Hinduism, Islam and Buddhism), numbers continue to remain proportionally low.

**Speak English at home**
(2021)

↓5% since 2011

82%

↑66% since 2011

**45%**
**Secular beliefs or no religion**
(2021)

43% affiliated with Christianity

2.2% affiliated with Hinduism

**Place of birth**
(2021)

73% born in Australia no change since 2011

9% born in the UK
↓3% since 2011

7% born in Asia
↑16% since 2011

# Social Inclusion and Wellbeing

Personal experiences of social inclusion and wellbeing correlate with high levels of community strength and good public health. This data reveals the level of participation in community life and feelings of inclusiveness and contentment in the City.

19% of our population have identified as living with a disability, and 6000 residents or 6% of our population require assistance with core activities such as communication, mobility, etc. There is a strong relationship between age and the need for assistance.

As part of our Community Wellbeing Survey, it was identified that resident's satisfaction with life as a whole has been decreasing, as well as feeling part of their community.

There has been a decrease in percentage of volunteers in the City since 2011 by 2%. Council itself has 389 registered volunteers who contributed over 40,000 hours of service annually. This includes assisting people with literacy skills, running community centres, library volunteers, support to our aging community through Active Aging programs.

In 2016, there were an estimated 155 homeless persons in the Tea Tree Gully, representing 0.2% of the total 91,538 people in this region. This includes persons who were marginally homeless. Updated 2021 data has not yet been made available.

### Satisfaction as part of the community

2019
2020
2021
2022

### Satisfaction with life as a whole

2019
2020
2021
2022

### Satisfaction with feeling safe

2019
2020
2021
2022

## 19% living with a disability in 2018

## 6,007 require assistance with core activities

↑0.9% since 2016

### Age vs need for assistance

0-04
60-64
85+    47%

# Our Environment

# Tree Cover and Green Spaces

The quantity and quality of tree cover and green spaces plays an important role in the public realm, such as for shade, cooling and water treatment, as well as being integral in creating environments that people want to spend time in. This public realm also provides connectivity between different places and spaces and the activities that occur there, and supports passive transport options via walking and cycling.

According to preliminary data prepared by Green Adelaide, 22.4% of the Council area has tree canopy coverage from trees greater than 3m in height. This is higher than the average for the study area of Adelaide metropolitan councils (16.7%). 39.8% of Tea Tree Gully's tree canopy coverage is located in reserves. The proportion of green space, defined as area that is covered by vegetation including trees, shrubs and grass, is approximately 35% of the council area, compared with 28.2% of the Adelaide metropolitan area.

There are approximately 606 parks and reserves in the City, with approximately 1,305 hectares of open space incorporating around 122 playgrounds. There are approximately 670 kilometres of footpaths across Tea Tree Gully, of which approximately 570kilometeres are sealed.

### Green Space
(2023)



## 35%

### Open Space
(2023)



## 1,305 ha

### Tree Canopy Coverage
(2023)



## 22%
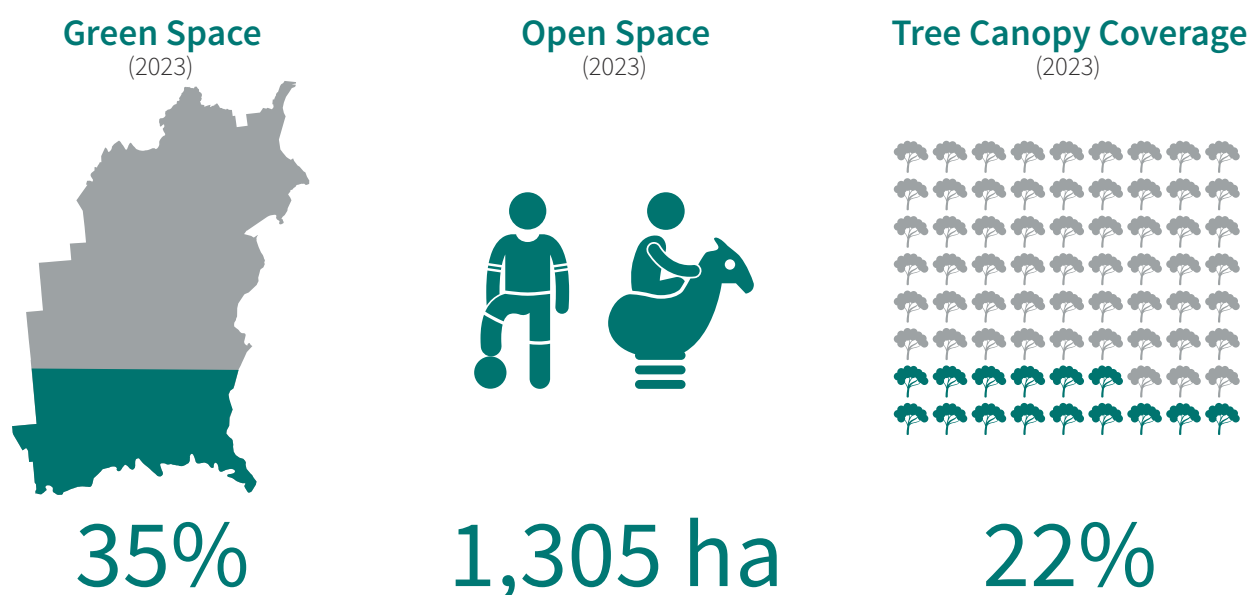
# Bushland and Biodiversity

Biodiversity and associated ecological processes underpin the health of the environment and its ability to support human needs. This includes basic requirements such as the production of oxygen, creation of soil, nutrient cycling and purification of water, and breakdown of wastes. Biodiversity regulates the environment and provides the basis for many popular recreational pursuits in the City

At 2023, there are 39 Conservation Reserves in the City that have been recognised as supporting important native vegetation communities. Currently, 30 of these remnant bushland sites are regularly maintained by specialist contractors, CTTG biodiversity staff and Bush For Life volunteers to protect and restore biodiversity values. Furthermore, 17 sites have been registered as Bush for Life sites and these are managed with the assistance of 35 volunteer site allocations, averaging 1287 hours of on-ground regeneration work annually.

A total of 39 hectares of habitat revegetation has occurred across the City since 2000, covering 42 reserves with 20 hectares of revegetation from 2016 to 2023. Additionally, approximately 800 people participated in 5 biodiversity events in the City in 2022. The interest and involvement of community members in biodiversity, habitat revegetation and bushland conservation has been increasing.

**Habitat Revegetation**

(2016-2023)
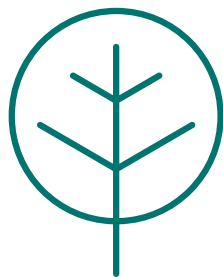
**20 ha**

**Bushcare Volunteer Hours**

2021-2023

**1,287**

**Participation in biodiversity events**

2022

**800**

# Waste and Recycling

The level of waste and recycling in the City gives an indication of the rate of consumption of natural resources which forms an important of part of managing the environment sustainably.
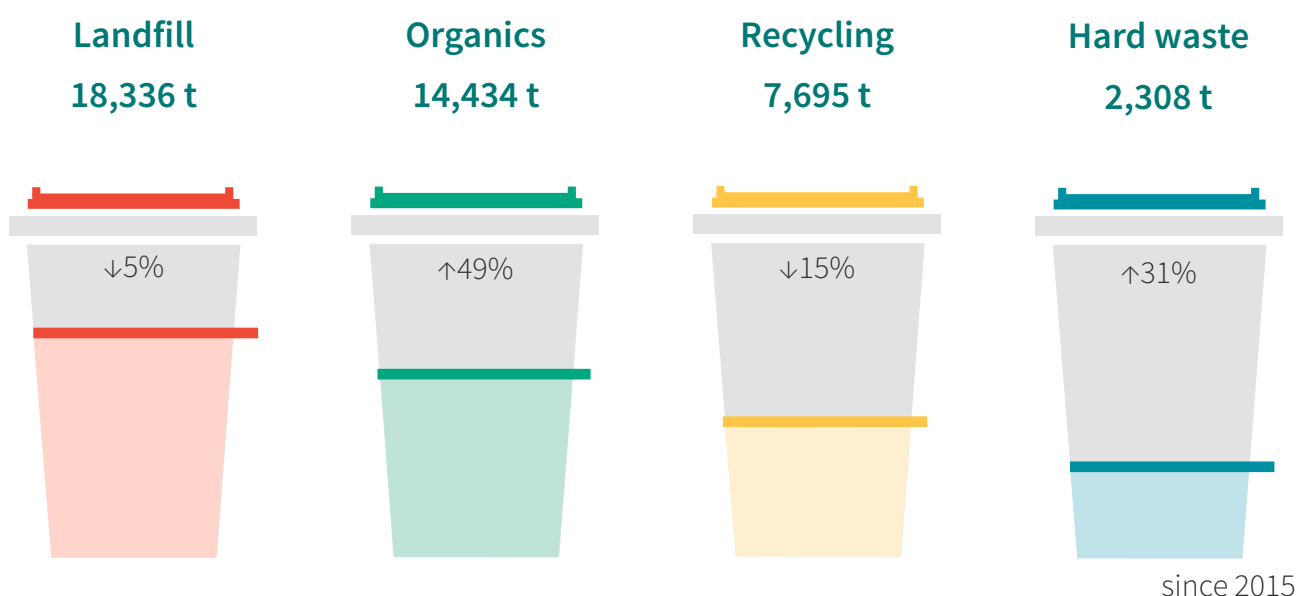
Waste diverted from landfill has increased from 18,484t in 2015 (11% increase) to 20,455t of which 7,695t was recycling and 12,760t was organics

The trends are showing a decrease in waste being sent to landfill, despite extra bins being collected each week due to population growth.

In addition to the increase in green organics which was recycled into compost for gardens and agriculture, about 12,000 vehicles took additional organic waste to Enviro Care events (free green waste drop-off service for residents) in the first half of 2022, which was processed into mulch for Council parks and reserves.

Council has also developed education initiatives and resources for school students to foster a better understanding of the importance of correct waste disposal and how it impacts on the environment.

In 2023, Council endorsed its Waste and Resource Recovery Strategy which will guide the City of Tea Tree Gully and its community through to 2033. It has been developed with the input of our community, industry partners and other stakeholders.

| Landfill | Organics | Recycling | Hard waste |
|----------|----------|-----------|------------|
| 18,336 t | 14,434 t | 7,695 t | 2,308 t |
| ↓5% | ↑49% | ↓15% | ↑31% |

since 2015

# Water and Energy Use

Council is seeking to lead by example in relation to water and energy use. Council's energy and water usage provides an insight into the sustainability of existing infrastructure and the potential environmental impacts of over-consumption.

There are several solar energy systems across our Council buildings, the largest of which is at the Service Centre (200kw). The total capacity across all Council buildings is 280kw, generating 409,000kWh per year, or approximately 13% of Council's energy needs.

These systems have seen a large increase in solar energy generation, and provides approximately 5% of Council's energy needs. One of Council's key energy saving projects is the Street Light Conversion Project which once completed is expected to result in projected yearly savings of $500k, as well as a reduction of an approximately 700,000kwh annually. Council have also been undertaking numerous building lighting upgrades.

As a result of these energy efficiency projects, we have seen a reduction in electricity use of over 10% since 2015.

Council manages numerous innovative water schemes including 7 MARs – Managed Aquifer Recharge sites including Kingfisher, Tilley, Edinburgh etc, where water is treated and injected to the aquifer, and extracted at a later date when needed. Council also operates the Waste Water Treatment Plant at Greenwith and a Stormwater Recycling system at Wynn Vale Damn, and these projects have seen a reduction in mains water usage by 8.5% since 2015. The ratio of recycled water to mains water use is just over 40%.

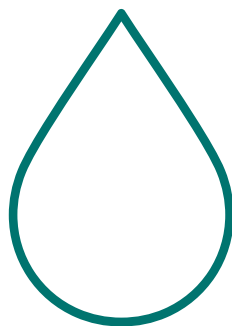## Solar energy generated by Council
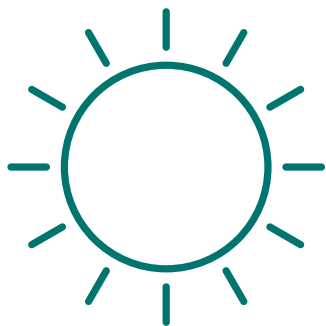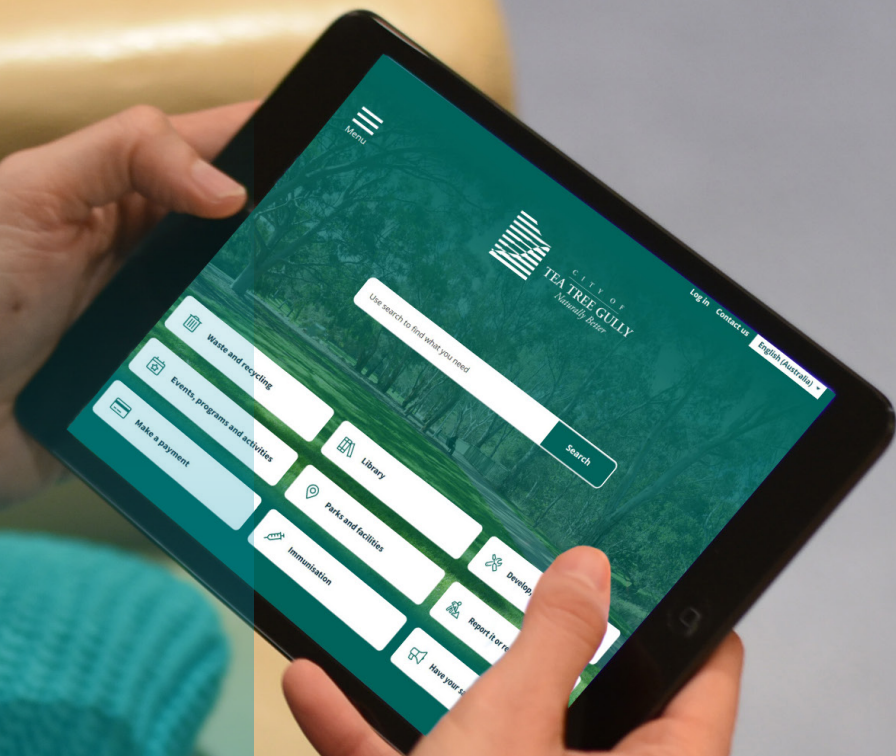
**409Mwh**

annually

## Electricity used by Council
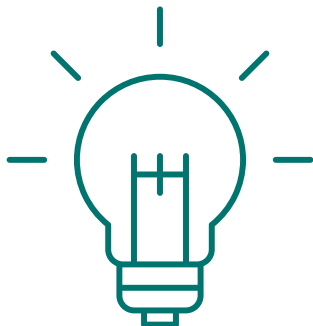
**↓10.5%**

since 2015

## Mains water usage by Council

**↓8.5%**

since 2015

# Our Economy

# Size and Structure

The size and structure of the City's economy gives an overall snapshot of the relative health and productivity of the local area.

The Gross Regional Product (GRP) for the City is estimated at $3.7 billion which represents approximately 2.8% of the estimated Gross State Product for South Australia. The Tea Tree Gully economy supports an estimated 25,879 jobs, representing 21.7% of the 119,209 people working in Northern Adelaide and 3.1% of the 834,812 people working in South Australia.

The city was home to almost 5,500 businesses. Whilst previous trends indicated a net loss of businesses from 2009-2015, particularly in the retail and construction sectors, the number of businesses has been increasing since 2015.

Employment opportunities have also increased with the number of local jobs increasing by 18% since 2015.

The value of building approvals spiked in FY17/18 and decreased until FY20/21. Approvals are in the increase again.

**Gross Regional Product**
(2021)

61%
since 2015

$3.7b

**Number of business**
(2021)

8%
since 2015

5,499

**Number of jobs**
(2021)

18%
since 2015

25,879

# Industries

The various industry sectors active in the City play different roles in the local economy. This data shows the types of businesses that generate employment and also the general makeup of the City's business community.

The Tea Tree Gully economy generates an estimated $6.4 billion in output which is the total sales or total income generated by business which is approximately 14.5% of the output for the Northern Adelaide Region and 2.4% for South Australia.

The construction sector is the highest contributor, contributing $1.2 billion to the economic output of the region. The majority of jobs are in health care and social assistance (19%), retail trade (16%) and education (12%). Healthcare is the region's largest employer, surpassing retail as the dominant employer for the City over the past 10 years.

The economic base of the City of Tea Tree Gully is also scattered with small businesses, many that are home-based. Business parks located in Golden Grove and Holden Hill support a variety of industries.
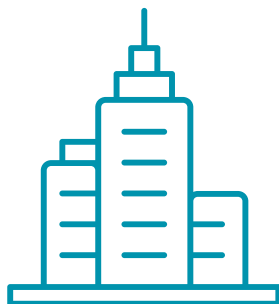
**Healthcare jobs**
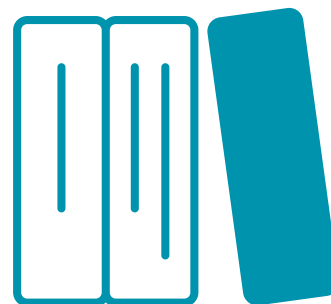(2021)
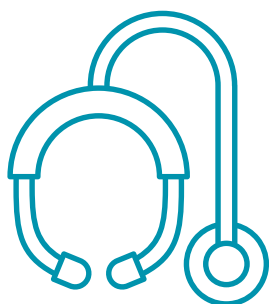
**19%**

15% in 2014

**Retail jobs**
(2021)

**16%**

19% in 2014

**Education jobs**
(2021)

**12%**

13% in 2014

# Labour force

The City's labour force consists of all working aged residents (aged 15 years or over) regardless of whether they work within our City or outside of our council boundary. Characteristics of the City's labour force reveal the skills that are available locally, even if they are not currently employed in the local economy.

Our labour force consists of over 50,000 employed residents. The majority of our labourforce commute outside of the City for work. Whilst almost 25% of our labour force are employed within the City, 17% work in the City of Adelaide local government area and 13% work in the City of Port Adelaide and Enfield.
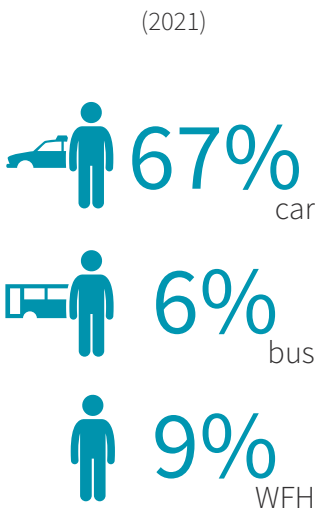
52% of our labour force are male, where as 48% are female. The highest percentage of our labourforce are aged 35-44 (23%) closely followed by 45-54 year olds (22%)

Our workers primarily drive to work, with over 67% driving to work, compared to only 6% who catch a bus or other form of public transport to work.

## Employed Residents
(2021)

1% since 2014

50,906

## LGA of Work
(2021)

25% CTTG

17% Adelaide

13% PAE
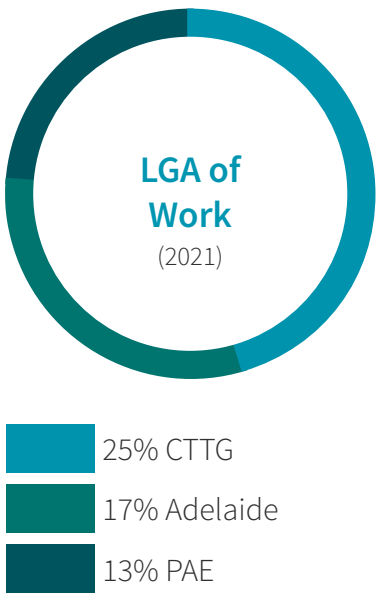
## Method of travel to work
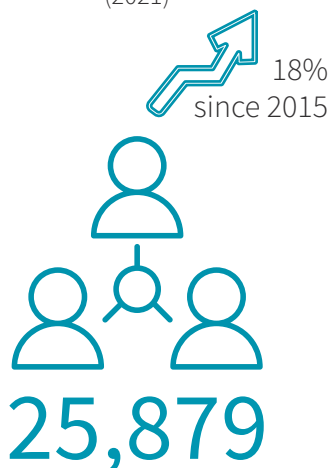(2021)

67% car

6% bus

9% WFH

# Workforce

The city's workforce is made up of all those people who are employed within the city's boundaries regardless of whether or not they are residents of the city. Characteristics of the City's workforce reveal employment opportunities and indicate whether the skill sets of residents match with the jobs available in the local area.

Over 25,000 people work in the City of Tea Tree Gully itself. Of these workers, 47% also live in the City. There is a fairly even split of part time workers vs full time workers. 55% of our workforce are female and 45% are male. The highest percentage of our workforce are aged 25-34 (21.5%) followed by those aged 35-44 (19%).

An underemployed person is someone who is currently employed, but who would like and is available to work additional hours. The latest data by Local Government Area from March 2022 indicates an underemployment rate of approximately 3% for the City.
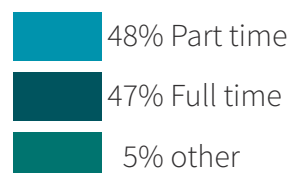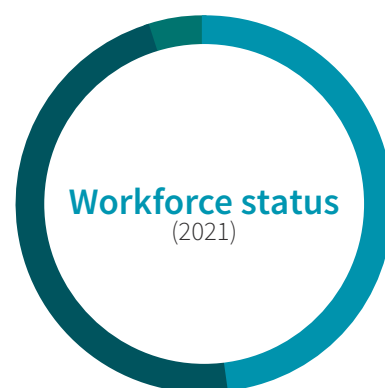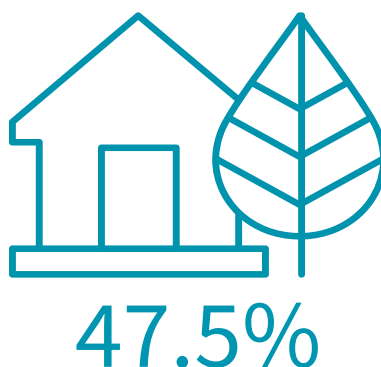
**Number of people working CTTG**
(2021)

18% since 2015

**25,879**

**Percentage of Workforce living in CTTG**
(2021)

**47.5%**

**Workforce status**
(2021)

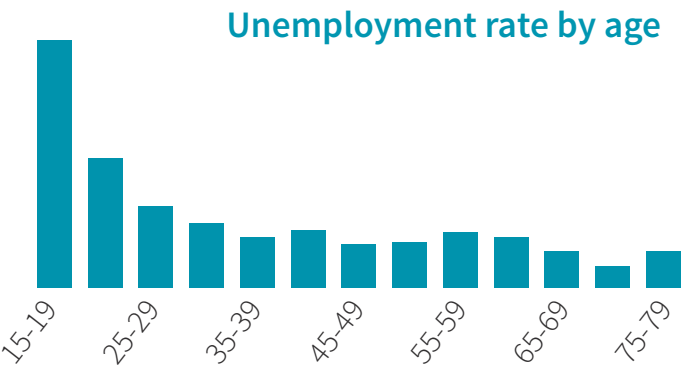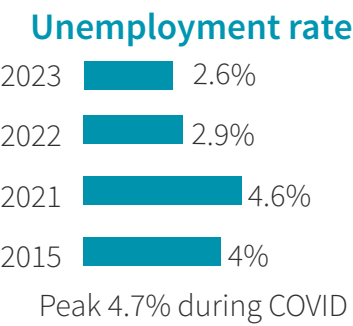48% Part time

47% Full time

5% other

# Unemployment

Unemployment is an important indicator of the economic success of the City.

The most recent data from March 2023 which allows a breakdown for our region shows a 2.6% unemployment rate which is lower than the SA unemployment rate of approximately 4.1%. We have approximately 1,530 unemployed jobseekers.

Our youth are experiencing the highest levels of unemployment at 7.8% compared with 3.8% for young workers and 2.4% for older workers.

The peak rate of unemployment was 4.7% which was during COVID. Since then, the rate of unemployment has been steadily declining

## Unemployment rate

| | |
|---|---|
| 2023 | 2.6% |
| 2022 | 2.9% |
| 2021 | 4.6% |
| 2015 | 4% |

Peak 4.7% during COVID

## Unemployment rate by age

15-19   25-29   35-39   45-49   55-59   65-69   75-79

**7.8%**

**15-24 year olds experience the highest rate of unemployment**

**Unemployed job seekers 2023**

**1,530**

# Sources

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