

# Victoria's regional centres – a generation of change



Department of Planning  
and Community Development

## Ballarat

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## Ballarat

Ballarat and Bendigo share similar characteristics, both are about half the size of Geelong, located inland, and more distant from Melbourne. Ballarat had a 2006 population of just over 75,000 persons and is about 100km west of Melbourne. Its initial rapid expansion, both economically and socially, was fuelled by the discovery of gold deposits in the 1850s. This impetus for settlement contrasts with most other towns in regional Victoria, which were located near a supply of water or at transport junctions. The wealth generated from the mining of gold was considerable, resulting in an architectural legacy that is reflected in the number of historic buildings that characterise the inner area. In the twentieth century the manufacturing sector developed as the gold deposits were depleted, but in more recent years the service sector, particularly retail, health, education and tourism, has become more prominent.

An important distinguishing feature of suburban development between the large regional centres and in Melbourne is the different time scales at which this occurs. In Melbourne, it is common for suburbs to become established within a short space of time due to the volume of growth. As such, the development of a suburb can often be ascribed to a particular era. This is not necessarily the case in the large regional centres, where suburbs can develop over many decades and therefore incorporate cycles of growth and decline in the same area. Examples of these suburbs include Belmont in Geelong, Mount Helen in Ballarat, and Kangaroo Flat in Bendigo.

This report refers to the urban area of Ballarat and its suburbs, as opposed to the municipality of the same name. In *Towns in Time*, the Collection Districts (CDs) defined in the Census of Population and Housing form the basis for the definition of the Ballarat urban area. It is an amalgamation of contiguous CDs that essentially comprise the built up area. It therefore excludes separate towns such as Miner's Rest. Suburbs are also formed by an amalgamation of CDs.

A map showing the suburbs of Ballarat is included in Appendix 1.



*Ballarat's western suburbs recorded significant growth over the period 1981-2006 and this area will be the focus of urban expansion in the future.*

# 1 Population change

Population growth trends in Ballarat over the period 1981 to 2006 have fluctuated, with below average growth in the 1980s, and stronger growth since 1996. In the period 1991-1996, growth was negligible, with only 130 persons added to the population. Like Geelong, Ballarat was hard hit by the early 1990s recession, with associated job losses and out migration, but the growth has rebounded to higher levels in the last ten years as the economy has recovered and recorded stronger growth.

TABLE 1: POPULATION CHANGE, BALLARAT, 1981-2006

	Population	Growth [%]*	Growth [number]**
1981	65,600	-	-
1986	66,997	0.4%	1,397
1991	67,958	0.3%	961
1996	68,084	0.0%	126
2001	71,618	1.0%	3,534
2006	75,015	0.9%	3,397

\* Annual average growth rate, previous five years

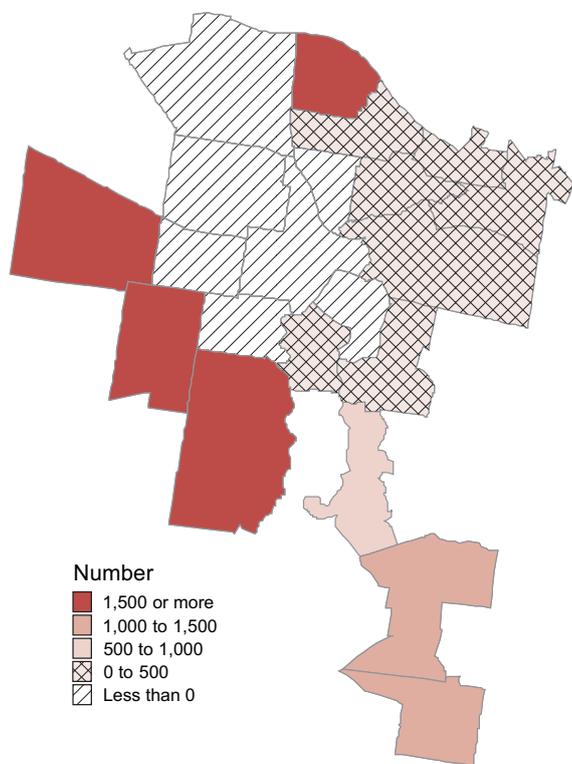
\*\* Absolute growth, previous five years

Source: DPCD, *Towns in Time (2008)*

Over the period 1981-2006 seven of Ballarat's 21 suburbs lost population, mainly in the established central and western suburbs. The north western suburb of Wendouree recorded the largest decline, from 12,730 in 1981 to 10,400 in 2006. Much of this area is devoted to social housing and there has been limited redevelopment of the housing stock. Over time, the population has matured and there has been significant out-migration of younger persons as they leave the family home. Ballarat Central also lost significant population (1,490) over the twenty five years, but it was more likely a result of conversion of houses to non-residential uses, combined with population ageing and declining household size. The area around the Ballarat Base Hospital has numerous examples of older houses converted to specialised medical practices.

Unlike Geelong, there is little evidence of any recent population turnaround in Ballarat's inner suburbs. This is partly due to the imposition of heritage overlays and restrictive covenants over much of central Ballarat which may act as a deterrent to large scale redevelopment of the inner core. The populations of Ballarat Central and Golden Point did increase slightly between 1996 and 2001, but then declined again between 2001 and 2006.

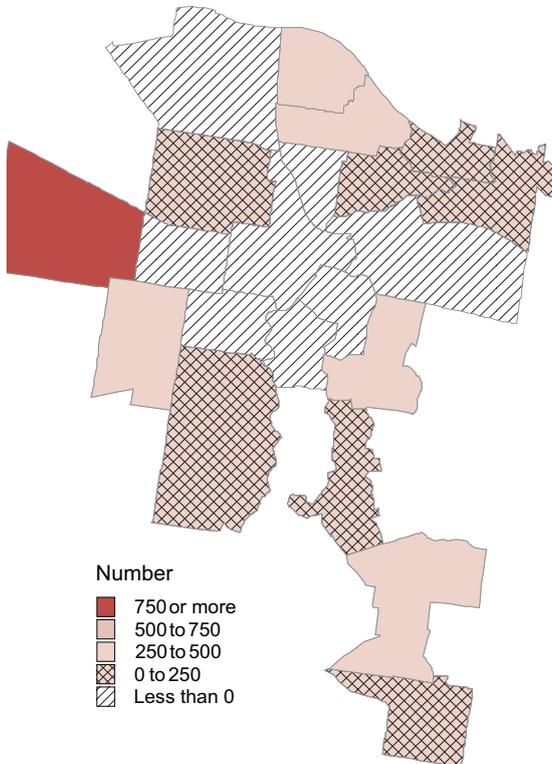
FIGURE 1: POPULATION CHANGE, BALLARAT SUBURBS, 1981-2006



Source: DPCD, *Suburbs in Time* (2008)

Most of Ballarat’s population growth over the last twenty five years has occurred on the western and southern fringe, as well as the northern suburb of Invermay Park. This suburb developed largely in the 1990s and population growth is now levelling out as the land supply is largely exhausted. Alfredton, located south of the Western Highway on the western fringe, recorded growth of almost 3,000 persons between 1981 and 2006, while neighbouring Delacombe recorded growth of 2,180 persons.

FIGURE 2: POPULATION CHANGE, BALLARAT SUBURBS, 2001-2006



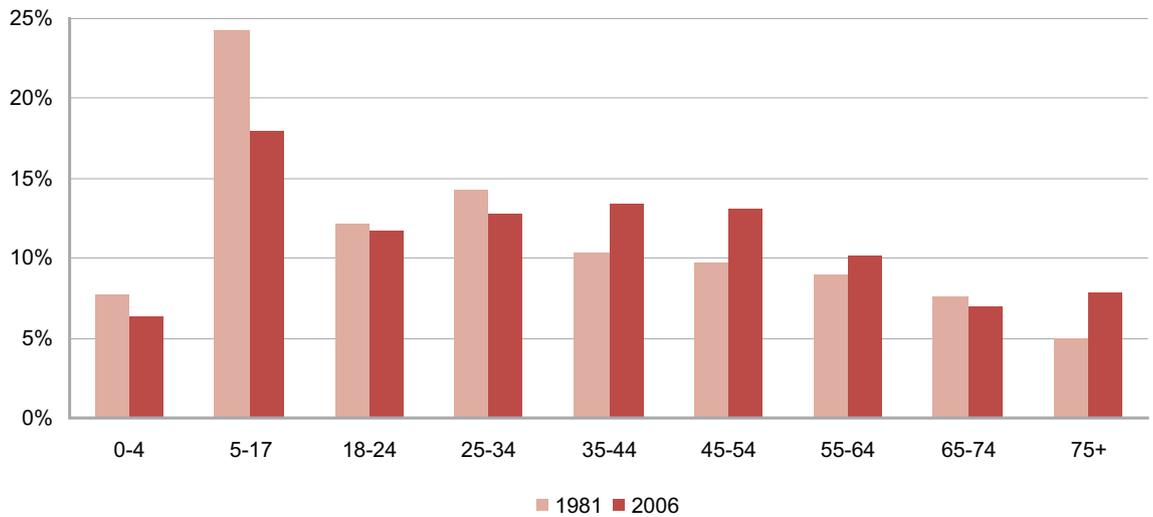
Source: DPCD, *Suburbs in Time*, (2008)

In the period 2001-06, population growth in Alfredton was particularly strong (1,110 persons, or growth of 4.3% per annum). Several new housing estates are located in this suburb and as it is a designated growth area, strong population growth will continue into the future. Growth was also strong in other suburbs with greenfield development sites, such as Canadian (420 persons), Invermay Park (410) and Delacombe (400).

## 2 Age structure

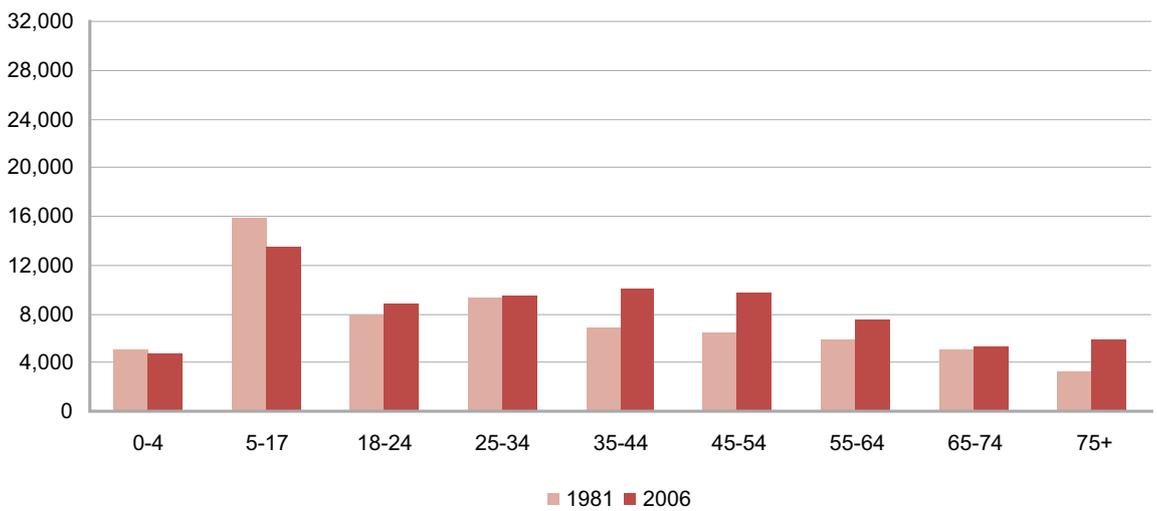
Changes in the age structure are important because a significant amount of service provision is age dependent. In Ballarat all age cohorts under 35 years declined as a proportion of the population, as did persons aged 65-74 years. The changing composition of the population was also demonstrated by an increase in the number and proportion of persons aged 75 years and over. In 1981, 5% of the population fell into this age category, increasing to 8% in 2006. In numerical terms, the number almost doubled, from 3,260 to 5,860. The number and proportion of children in Ballarat declined significantly over the twenty five years, with the change more significant for school aged children.

FIGURE 3: AGE STRUCTURE OF BALLARAT, 1981 AND 2006 [PERCENTAGE]



Source: DPCD, *Suburbs in Time*, (2008)

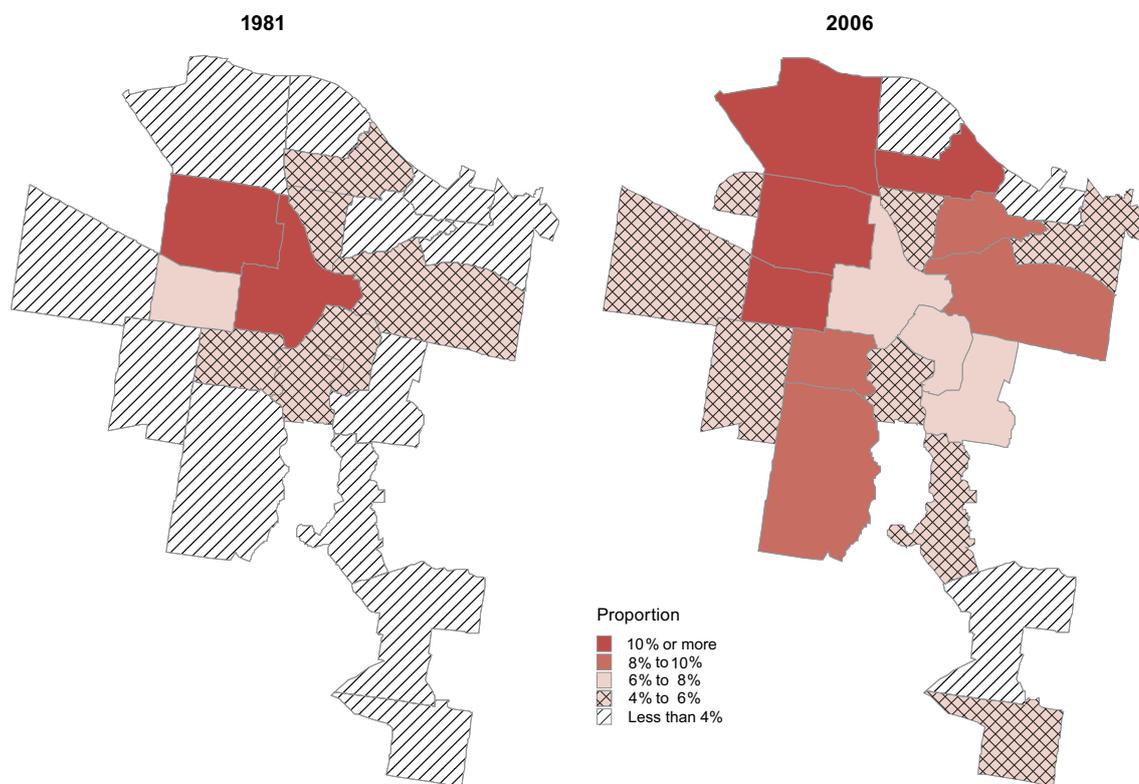
FIGURE 3: AGE STRUCTURE OF BALLARAT, 1981 AND 2006 [NUMBER]



Source: DPCD, *Suburbs in Time*, (2008)

In Ballarat, the pattern of ageing was demonstrated by an increase in the number of suburbs with a high proportion of elderly persons, as shown in Figure 4. In 1981, just two suburbs, Ballarat Central and Lake Wendouree, recorded more than 10% of their populations in the cohort 75 years and over. Most suburbs, particularly those on the southern and western fringe, had very low proportions of elderly persons. This highlights the differences in age structure between the more established suburbs, where ageing in place is likely to have occurred, and the recently developed ones which tend to contain more family households.

FIGURE 4: PROPORTION OF PERSONS AGED 75 YEARS AND OVER, BALLARAT SUBURBS, 1981 AND 2006



Source: DPCD, *Suburbs in Time*, (2008)

By 2006, Ballarat had aged considerably and more suburbs recorded higher proportions of elderly persons, particularly in the north. Lake Wendouree recorded the highest proportion of elderly persons in 2006 (17%), up from 12% in 1981. Other suburbs to record high proportions were Ballarat North and Wendouree (both 11%) and Newington (10%). Ballarat Central, which along with Lake Wendouree was the most elderly suburb in 1981, recorded a large decline in the elderly population – down to 7%. This occurred in conjunction with population and dwelling decline and the twenty five years.

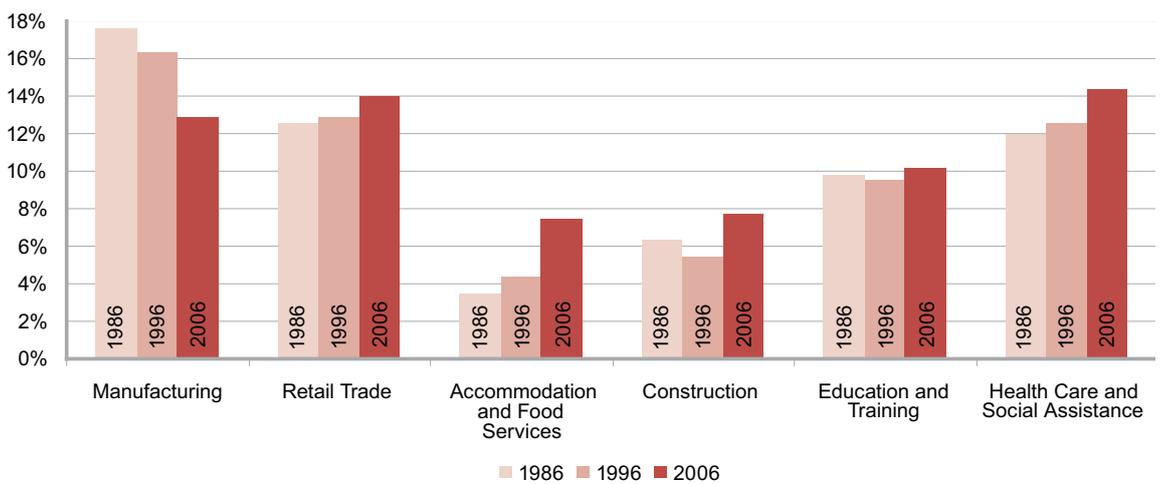
### 3 Labour force

Regional centres are key providers of employment and services, not only for their own residents, but for increasingly wide rural catchments. Overall, the key industries in regional centres are retail, education, health and manufacturing. Industries such as construction, public administration and transport and storage also have important roles, especially compared to small towns.

Figures 5 and 6 show the main features of the resident workforce in Ballarat over the period 1986-2006. The resident workforce is the number of employed persons who live in Ballarat. This means it includes people who may work elsewhere, but excludes people who live outside of Ballarat but who work in the town. The municipality of Ballarat has a labour force self containment rate of 82%, which means that the majority of people live and work in the town.

The workforce grew by 7,800 persons between 1986 and 2006, with much of this growth occurring since 1996 as the economy recovered from the early 1990s recession. During this time there were significant changes in the industrial composition of the workforce. A key feature was a decline in the proportion of persons employed in manufacturing from almost 18% in 1986 to 13% in 2006 (Figure 5). Despite this, the number of persons employed has remained relatively stable over this time (Figure 6), due to strong performance in specific sectors such as food processing. Examples of large manufacturing employers located in Ballarat include Mars and McCains.

FIGURE 5: PROPORTION OF EMPLOYED PERSONS, BY SELECTED INDUSTRY, BALLARAT, 1986-2006



Source: DPCD, *Towns in Time*, (2008)

At the same time, growth in service related industries has occurred, in line with population growth and demand, as well as a general shift towards a service related economy. As Figure 6 shows, there has been significant growth in Retail Trade, Health Care and Social Assistance, and Accommodation and Food Services. Together, these three industries accounted for almost two-thirds of workforce growth in Ballarat between 1986 and 2006. Health Care and Social Assistance is now the largest employing industry in Ballarat (4,570 persons), comprising 14.3% of the workforce. This reflects the strength of this sector not only in the town, but its role in servicing a wide catchment covering much of western Victoria. One of the largest training hospitals in Victoria is located in Ballarat, contributing to higher employment in the sector.

FIGURE 6: NUMBER OF EMPLOYED PERSONS, BY SELECTED INDUSTRY, BALLARAT, 1986-2006



Source: DPCD, *Towns in Time*, (2008)

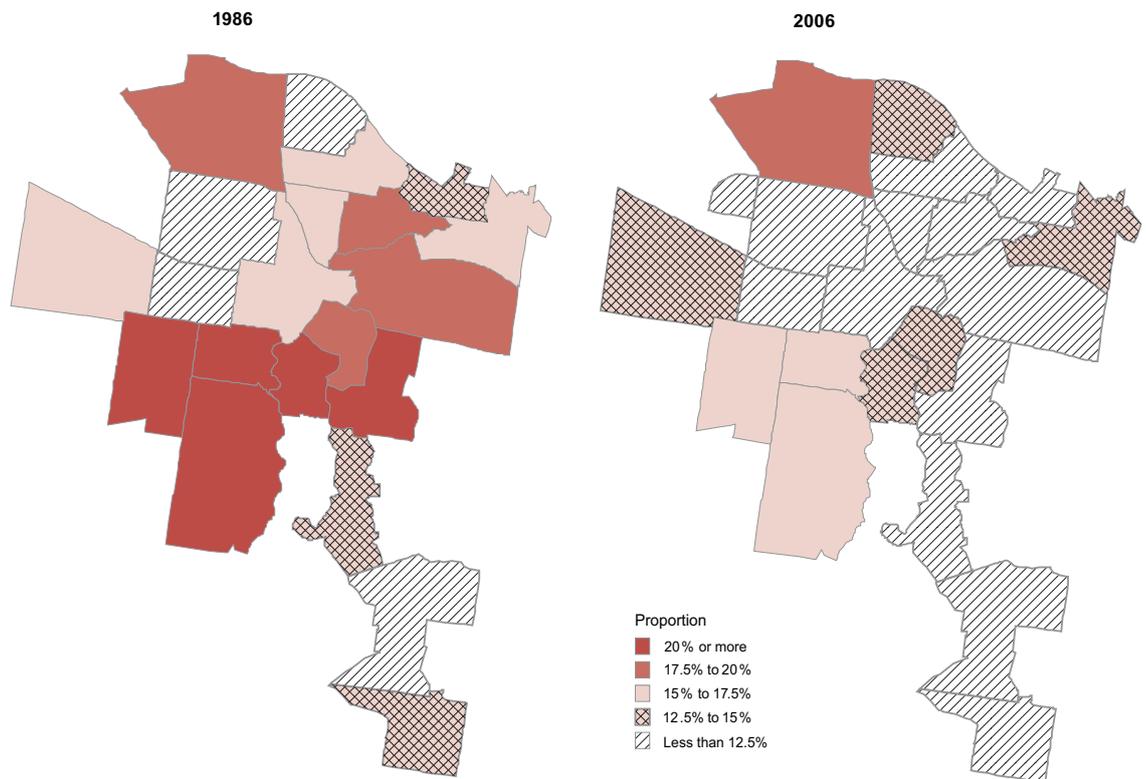
Although coming off a lower base, employment in Accommodation and Food Services showed strong growth, increasing from 3% of the workforce in 1986 to 7% in 2006. However, in numerical terms, the increase was almost threefold, from 820 to 2,380. Ballarat is a major focus for tourism in regional Victoria with a variety of attractions, and the employment growth in the Accommodation and Food Services sector is a reflection of the growth in the domestic tourism market and restaurant sector, as well as the changing lifestyles of Ballarat residents.

### 3.1 Labour force – manufacturing

While there has been significant change in Ballarat's manufacturing sector, as discussed above, it has not experienced the large decline in overall employment like Geelong. Nevertheless, there have been significant changes in the spatial distribution of manufacturing employees in the town. Figure 7 below shows the proportion of persons employed in manufacturing in Ballarat in 1986 and 2006. In 1986, there was a band of suburbs south of the CBD where more than 20% of the resident workforce were employed in the sector, most notably Sebastopol (23%). At the time, the bulk of Ballarat's industrial land and enterprises were located in this band of suburbs.

By 2006 there was a completely different spatial pattern as no suburbs had more than 20% of the workforce employed in manufacturing. These declines in the proportion of manufacturing workers have resulted from relatively minor shifts in employment patterns, especially when compared to the suburbs of Geelong. The highest proportion was recorded in Wendouree, on the north western outskirts (18%). A major industrial park is located in the area, much of which has been developed in more recent years and is earmarked for further growth. Lot sizes here are more conducive to larger operations such as Mars and McCains and this may influence employment levels in neighbouring suburbs such as Wendouree.

FIGURE 7: PROPORTION OF PERSONS EMPLOYED IN MANUFACTURING, BALLARAT SUBURBS – 1986 AND 2006



Source: DPCD, *Suburbs in Time*, (2008)

## 4 Knowledge economy and educational attainment

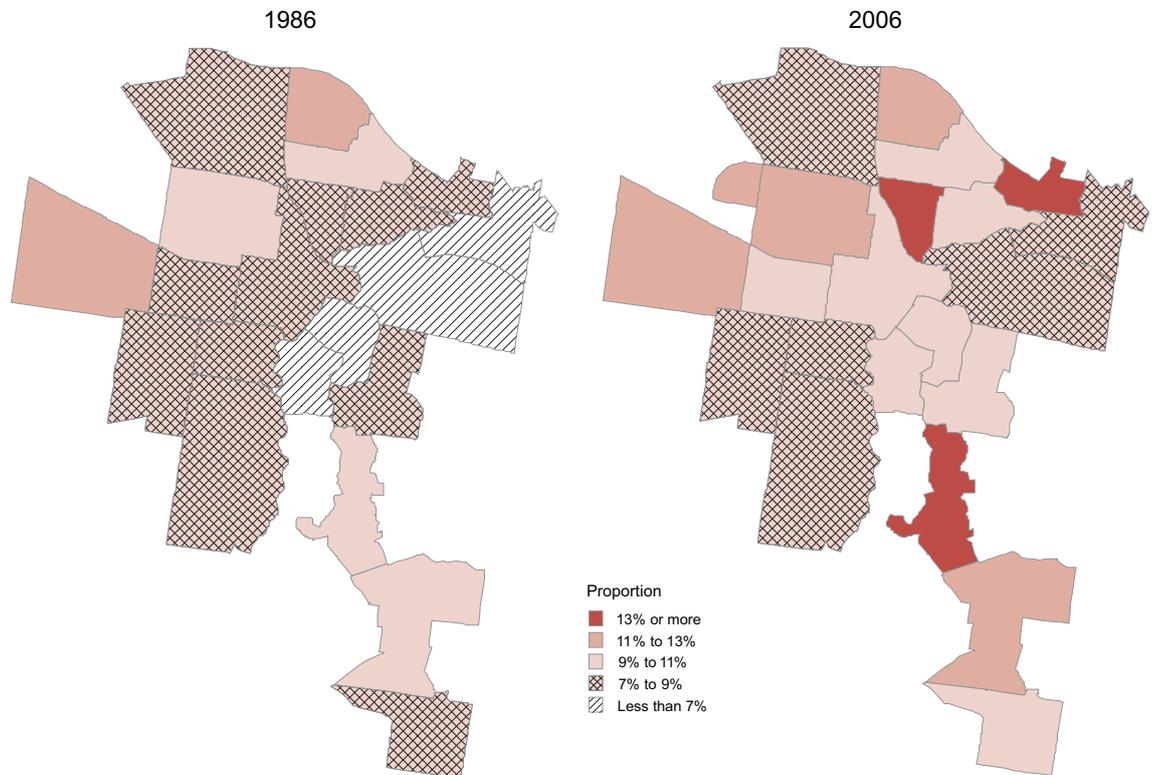
The growth of “knowledge economy” industries (defined here as the ANZSIC categories of Information, Media and Telecommunications; Financial and Insurance Services; and Professional, Scientific and Technical Services) has been characterised by a structural shift in the economy away from manufacturing to a mode of production based on knowledge and information generation. Like employment in manufacturing, employment in “knowledge economy” industries tends to display a distinct spatial pattern. The inner cores of many large modern cities are resident to concentrations of people employed in “knowledge economy” industries, and this has increased markedly in recent decades. The smaller size of Victoria’s regional centres in relation to cities such as Melbourne means that the growth of employment in “knowledge economy” industries has been slower but the distribution of their workers across the suburbs still shows distinct spatial patterns. In Ballarat, while many suburbs recorded increases in the proportion of their workforces employed in “knowledge economy” industries, the spatial pattern was quite dispersed (Figure 8). Unlike Geelong, the inverse relationship with manufacturing employment was not as clear, though overall, suburbs with the highest level of employment in “knowledge economy” industries also had low levels of manufacturing employment. In 2006, the suburbs with the highest proportions of “knowledge economy” employment were Nerrina (15%), Soldiers Hill and Mount Clear (both 14%). Of these, only Soldiers Hill could be considered an inner suburb, while Nerrina and Mount Clear are characterised by semi-rural settlement patterns with houses on larger blocks. Mount Clear is also home to the University of Ballarat, which may partly explain the higher proportion of “knowledge economy” workers resident in this suburb.

At the other end of the scale, Wendouree, which had the highest proportion of manufacturing employment in 2006, also had the lowest proportion of “knowledge economy” employment (7%). As mentioned previously, this is an area of social disadvantage with limited connections to the knowledge economy.



*Industrial parks in the suburb of Mount Helen benefit from the co-location of the University of Ballarat.*

FIGURE 8: PROPORTION OF PERSONS EMPLOYED IN “KNOWLEDGE ECONOMY” INDUSTRIES, BALLARAT SUBURBS, 1986 AND 2006



Source: DPCD, *Suburbs in Time*, (2008)

The close relationship between the growth in “knowledge economy” employment and that of persons with university qualifications is demonstrated by their spatial distribution across the suburbs of Ballarat. In 2006, there were two main concentrations of people with university qualifications. The first is in the south east on the Geelong Road out to Buninyong, corresponding with the location of the University of Ballarat. The second was in an arc of suburbs stretching from Alfredton in the west, through the established suburbs in the northern part of Ballarat out to Nerrina in the north east. Some of these suburbs, as discussed previously, also have the highest proportions of people working in “knowledge economy” industries.

Compared to Geelong and Bendigo, Ballarat recorded the largest percentage point increase in its university qualified population and this is evident from the scale of change (Figure 9). Many suburbs have recorded large increases in their university educated populations and the majority had more than 16% (or 1 in 6) of their adult populations with university level qualifications. Lake Wendouree had the highest proportion of university qualified people in 2006 (32%), up from 10% in 1986. Other notable examples of large increases were Soldiers Hill (6% in 1986 up to 26% in 2006) and Ballarat Central (6% and 26%).