



Agenda Report for Noting

Meeting Date: 19 June 2025

Item Name	Population growth and projections – June 2025	
Presenters	Chris Rudd and Jo-Anne Ragless	
Purpose of Report	Noting	
Item Number	6.1	
Strategic Plan Reference	N/A	
Work Plan Reference	N/A	
Confidentiality	Not Confidential (Release Immediately)	
Related Decisions	24 th August 2023, Item 6.1, Population projections for South Australia and regions, for noting.	
Conflicts Declared	Nil	
Is the Report author aware of any potential undeclared conflict?		NO

Recommendations

It is recommended that the State Planning Commission (the Commission) resolves to:

1. Approve the designation of this item as Not Confidential (Release Immediately)
2. Note the recent population change in South Australia and the comparison with projected growth.
3. Note the risks to future population growth associated with each of the population growth components.
4. Note the impact of new GARP growth areas on published local area population projections.
5. Note the commencement of a population projections review in June 2025.

Background

This report provides an update on recent population growth and demographic change for South Australia and its regions.

It focusses on any significant changes to the population growth components (overseas migration, interstate migration, births, and deaths) and how these changes may impact the population projections (the projections were noted by State Cabinet July 2023).

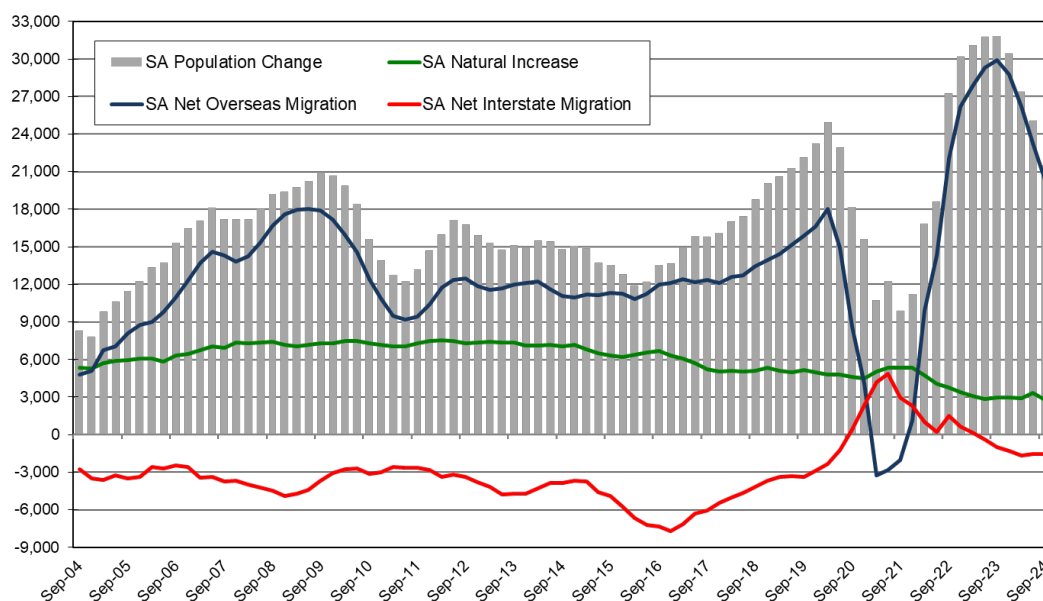
Population projections – 2021 census

- Population projections for South Australia and its 19 regions were officially released in early August 2023. State coordinated population projections provide a common base for land use, infrastructure, and service planning.
- The projections were developed just after the COVID-19 pandemic and at that time South Australia was experiencing interstate and overseas migration trends that were outside of longer-term trends.
 - Net Overseas Migration (NOM) which is the key driver of population growth in South Australia fell to record low levels due to international border closures
 - Net Interstate Migration (NIM) was positive (1000 persons) for the first time in over 20 years.
- To accommodate this uncertainty three projection scenarios (high, medium, and low growth) were prepared using varied assumptions about the components of growth (births, deaths, overseas and interstate migration).
- The high scenario population projection was used as the basis for the Greater Adelaide Regional Plan (GARP) population target (670,000 people) and in the country regional plans.

Recent population change – South Australia

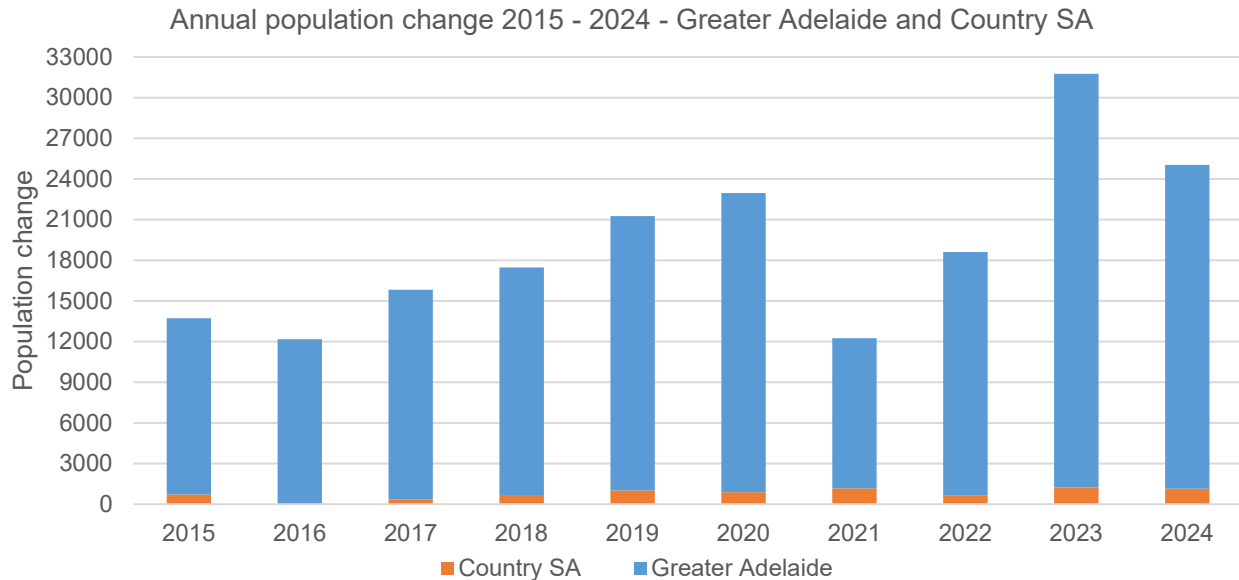
The chart shows actual population change over the past 20 years and clearly displays the disruption caused by the COVID-19 pandemic from early 2020, and the post COVID-19 surge. The key points to note are:

- South Australia's population increased by around 31,500 persons in the 12 months to June 2023. Since that time, growth has settled to a pre-COVID level of around 21,000 persons.
- Overseas migration has recovered strongly post COVID to reach a net gain of 30,000 in the 12 months to December 2023.
- Both interstate migration and natural increase have declined since 2021.



Growth surge in Greater Adelaide

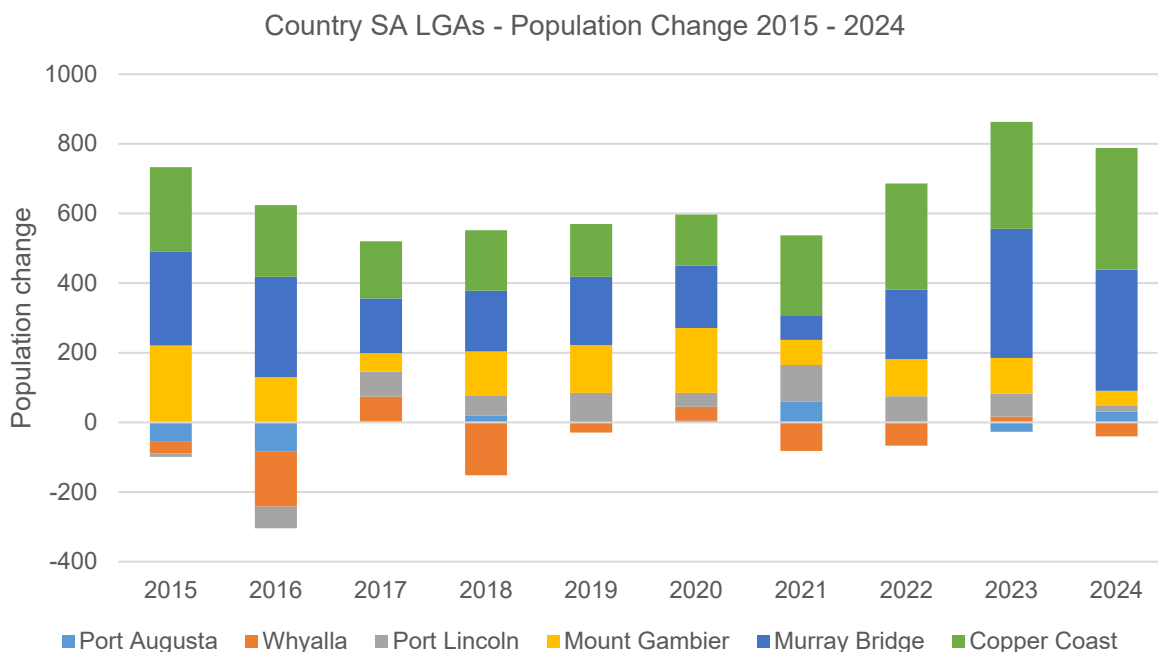
The following chart compares population change in the Greater Adelaide planning region (GAPR) with country South Australia over the past 10 years. Over this period, South Australia's population increased by 191,000 with GAPR accounting for 96% of this growth (183,000).



Note: Murray Bridge is included in the GAPR

Growth in Country South Australia has stalled.

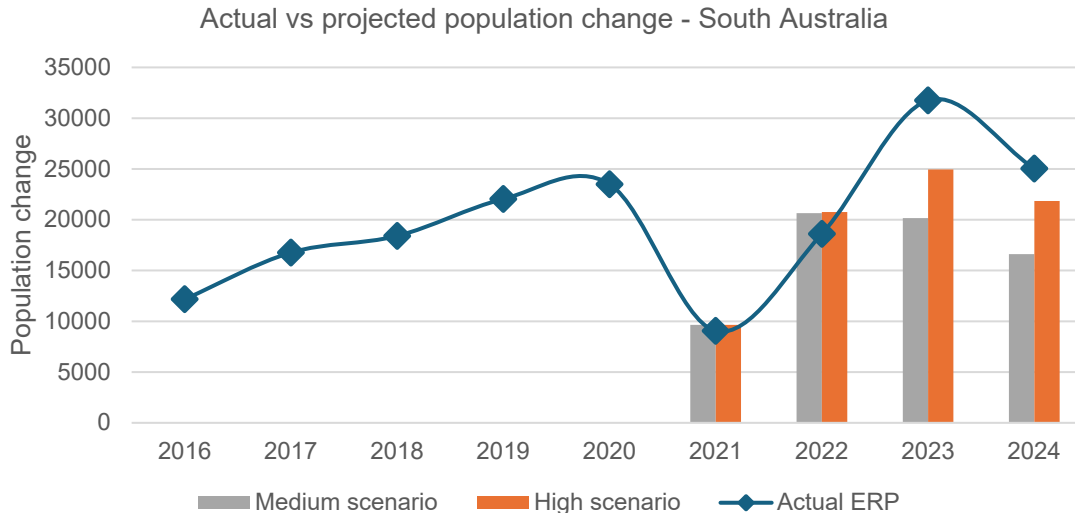
The population of country South Australia has increased by less than 8,000 people over the past 10 years (4% of total population growth). The following chart shows population change in the regional LGAs of Port Augusta, Whyalla, Port Lincoln, Mount Gambier, and Murray Bridge and Copper Coast.



The chart clearly demonstrates the low or negative population growth occurring in some country LGAs against the much higher growth occurring in the Copper Coast and Murray Bridge LGAs.

Projected population growth and recent population change

The chart below compares annual population change since 2021 (ABS estimated resident population) with the Medium and High population growth scenarios for South Australia. These projection scenarios assumed a post COVID recovery in 2022 but did not fully capture the growth that occurred in 2023 and 2024, as shown on the chart.



Since 2021 overseas migration has been the main driver of population growth in South Australia with a peak net gain of 30,000 persons recorded in 2023. Over the same time natural increase (births & deaths) has steadily declined to around 3000 per annum due to falling birth rates and rising death rates. Interstate migration has returned to a slight net loss after recording slight positive gains between 2020 and 2023.

Refer to Attachment 1 for a more detailed analysis of the population growth components and the assumptions used to develop the population projections.

Greater Adelaide Regional Plan (GARP) and sub-regional population projections

Population projections for local areas (SA2 and LGA) and sub-regions (10 GARP sub-regions) rely on detailed information and assumptions about existing and future land supply to distribute population growth over time. Regional and local area population projections are widely used by other agencies/utilities for more detailed infrastructure and service planning. Since the release of GARP there have been several requests for updated projections that reflect the growth framework outlined in the plan.

The currently published projections were released prior to the release of GARP and are therefore based on the strategic policy framework of the 2017 Greater Adelaide Plan. As a result, these projections no longer reflect the medium- to longer-term development potential for many areas.

Some of more significant changes in the GARP include:

- Kudla +11,600 lots
- Riverlea Park South 7,700 lots
- Roseworthy 33,000 lots
- Two Wells +10,800 lots
- Murray Bridge +22,950 lots
- Victor and Goolwa +9,050 lots
- Dry Creek 15,000 lots
- Port Stanvac 3,600 lots

- Numerous areas designated as “State significant infill”.

Discussion

Population growth components

Since 2022, population growth in South Australia has been strong and mostly driven by overseas migration. In the years following COVID overseas migration was characterised by strong inflows of temporary workers and students with reduced departures – hence much larger Net Overseas Migration (NOM) gains.

According to the [Centre for Population](#), NOM is expected to decline through to 2026/27 driven by a reduced number of arrivals and an increased number of departures as those migrants who arrived after COVID restrictions were lifted approach the expiry of their visas.

Without continued strong gains from overseas migration population growth in South Australia is at risk given our ongoing interstate migration losses and declining rate of natural increase.

GARP vs Regional South Australia

Greater Adelaide has accounted for 96% of South Australia’s population growth over the past 10 years (183,000 persons), over the same time the population of regional South Australia has increased by only 8,000 people.

For many regional LGAs the population has stalled with only a few areas accounting for most of the population growth (Copper Coast, Mount Gambier, Murray Bridge (also included in the Greater Adelaide region)).

For regional planning, the High growth scenario was used to drive land and housing targets. In many parts of country South Australia, the most recent published population data (to June 2024) indicates that the economic growth factored into the high growth assumptions could be overly optimistic. Whyalla and Port Augusta are both examples of this.

New urban growth areas and local area population projections

The new urban growth areas identified in the GARP, and the subsequent change to the Environment and Food Protection Area, have not been factored into the currently published regional and local area population projections. Given that these projections are widely used by other agencies/utilities for detailed infrastructure and service planning, it is critical that we assess the impact of these new growth areas on population growth over time.

Population projections review

Redevelopment of the 2021 population projections will take place to reflect the strategic policy directions of GARP and country regional plans, and to consider the most recent demographic trends. This will be a critical input for the local housing strategies and for developing growth management frameworks. It will also provide an improved base for key agencies such as health, education, transport and emergency services to plan and ensure service provision is appropriately aligned to growth areas.

The next population census is not until August 2026 and the results will not be available for at least another 12 months (i.e. late 2027) therefore updated projections are needed now to fill the gap until the 2026 projections are prepared in early 2028.

Attachments:

1. Recent population change and projection assumptions (#23295041)

Prepared by: Chris Rudd

Endorsed by: Greg van Gaans

Date: 10 June 2025

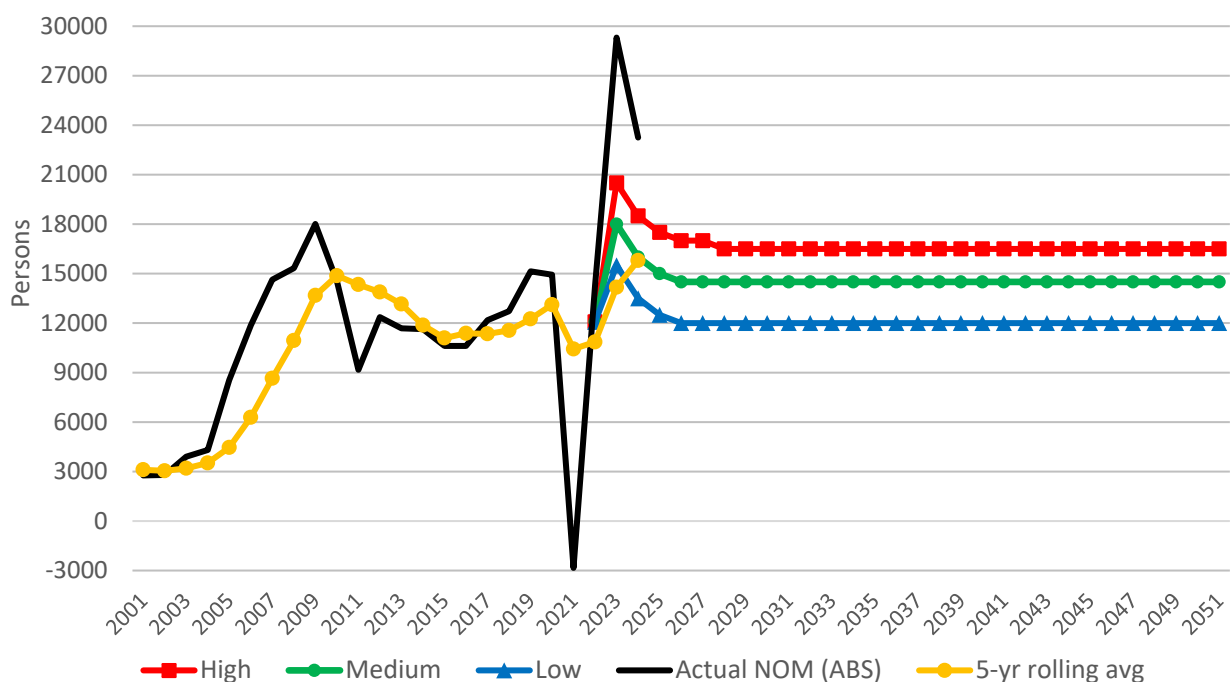
Attachment 1 Population projection assumptions and recent population change

Overseas migration is the main driver of growth in South Australia

The following chart compares actual Net Overseas Migration (NOM) estimates as published by the ABS (to June 2024) with the high, medium and low growth assumptions used to develop population projection scenarios for South Australia.

The chart shows that the population projection assumptions did factor in a post COVID rebound in NOM to 21,000 in 2023, however actual NOM was approximately 30% greater than what was predicted.

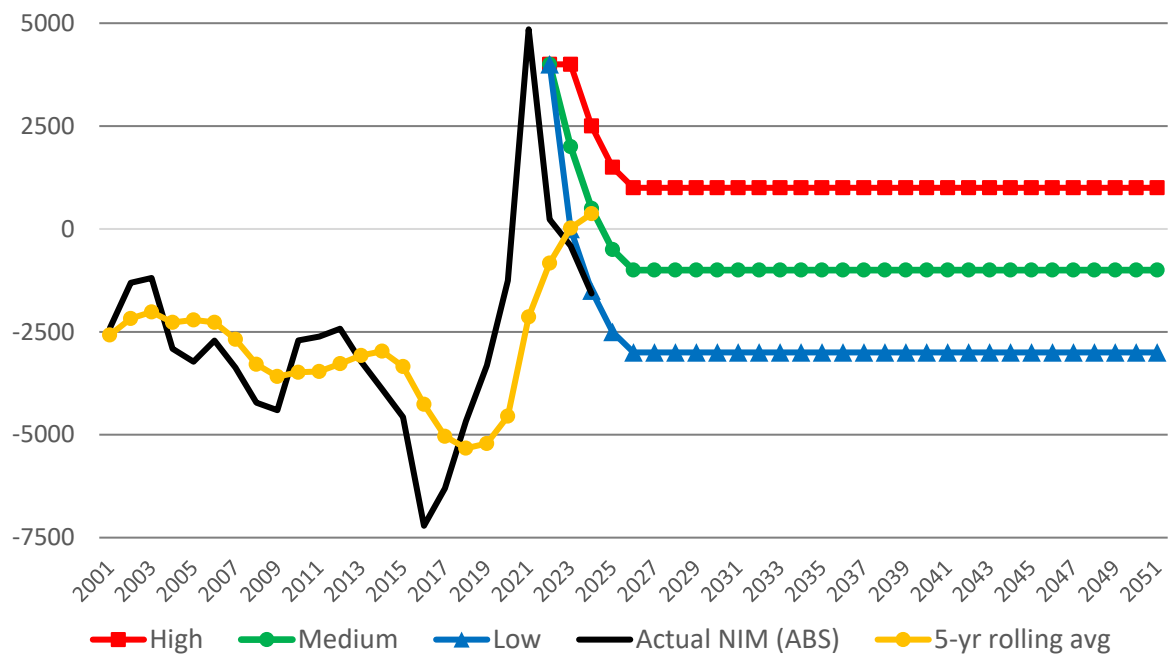
NOM is now sharply declining and the [Centre for Population](#) projects NOM to fall to around 14,600 by 2025-26, which is around our long term medium growth assumption.



Net Interstate migration (NIM) losses have returned

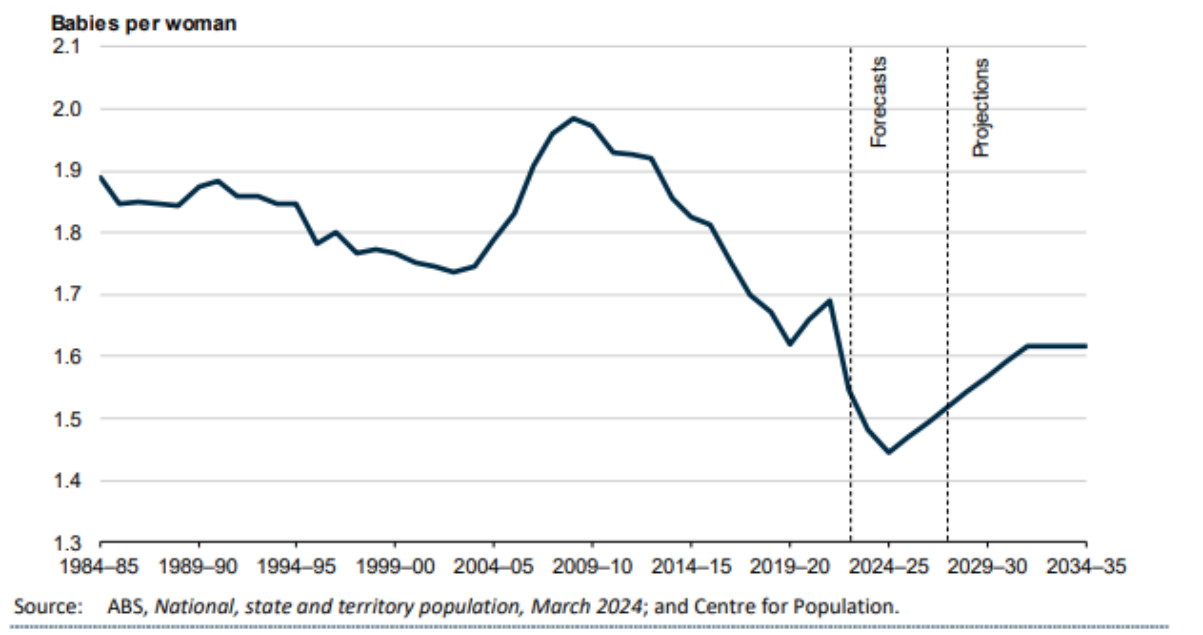
The following chart shows actual NIM estimates as published by the ABS, and the NIM assumptions used to develop population projections for South Australia.

Although a post-COVID NIM rebound (+5000 in 2021) was considered and factored into the projection assumptions, NIM losses to South Australia have returned at a faster rate than projected. NIM trending around the low growth scenario (-1500 in 2023/24).



Natural population increase is decreasing

For all Australian woman, the total fertility rate (TFR) declined to record low level of 1.5 in 2023. The following chart demonstrates the country's steady decline in TFR since 2009-10. Whilst the TFR declined to approximately 1.63 in 2019-20, it later increased to just below 1.7 during COVID, in 2021-22.



Source: ABS, National, state and territory population, March 2024; and Centre for Population.

In South Australia, the TFR was 1.5 births per woman in 2023 which is down from 1.85 in 2013. The chart below shows that fertility rates are current trending around the low growth scenario (assumed to be 1.5 over the projection period).

