2024
POPULATION
STATEMENT

CENTRE FOR POPULATION

Strong evidence. Deep insights. Collaborative approach.

ACKNOWLEDGEMENT OF COUNTRY

In the spirit of reconciliation, the Treasury acknowledges the Traditional Custodians of Country throughout Australia and their connections to land, sea and community.

We pay our respects to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples.

References to years are on a financial year basis (1 July to 30 June) unless otherwise stated. Population totals for a year refer to population as at 30 June of that year. For example, 'Australia's population was 25.6 million in 2019–20' means that Australia's population was 25.6 million as at 30 June 2020. Population flows for a year refer to flows during the financial year. For example, 'Australia's natural increase was 135,000 in 2019–20' means the natural increase in Australia's population from 1 July 2019 to 30 June 2020 was 135,000.

References to the 'states' or 'each state' include the Northern Territory and the Australian Capital Territory.

Figures in tables and in the text have been rounded. Transformations (for example, shares or rates of change) are calculated using unrounded numbers. Discrepancies between totals and the sum of components are due to rounding. In general, the rounding conventions used include:

- rates are rounded to one decimal place

- estimates over 10,000 are rounded to the nearest thousand

- estimates between 100 and 9,999 are rounded to the nearest 100

- estimates midway between rounding points are rounded up

- forecasts of net overseas migration at the national level are rounded to the nearest 5,000.

Estimates of future population and components of change are either forecasts or projections.

- **Forecasts** are predictions about what is expected to happen in the near term based on analysis and modelling in relation to current circumstances.

- **Projections** are based on analysis and modelling of long-term trends when rates or levels are stable. Projections may also include a transition from the last forecast to the assumed stable level or rate.

The main data source for these projections is the Australian Bureau of Statistics (ABS) *National, state and territory population, March 2024*, released in September 2024.

After the projections in this statement were prepared, the ABS released the *National, state and territory population, June 2024.* This publication showed, consistent with this statement, Australia's population was 27.2 million on 30 June 2024, 2.1 per cent higher than a year earlier. Net overseas migration was 446,000 in 2023–24, slightly lower than forecast in this statement.

The 2024–25 Mid-Year Economic and Fiscal Outlook (MYEFO) published the ABS estimate for net overseas migration in 2023–24. The forecasts in this statement and the 2024–25 MYEFO are otherwise consistent.

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FROM THE TREASURER

The Hon Dr Jim Chalmers MP

Treasurer

The primary focus of the Albanese Labor Government has been fighting inflation and easing the cost-of-living without ignoring the risks to growth. We've done this while repairing the budget and building a stronger, more productive economy for the future.

A big part of preparing for the future is understanding the demographic dynamics that are shifting and shaping our economy.

The 2024 Population Statement provides evidence and analysis of the population changes and challenges for our economy and budget in the years ahead, including migration, an ageing population and birth rates.

The Government's Migration Strategy is helping to ensure our migration system works in the national interest. Net overseas migration is expected to return to around pre-pandemic levels over the next couple of years as arrivals stabilise and departures pick up.

By 2064–65, nearly one-quarter of the population is projected to be aged 65 and over, which will pose a significant fiscal and social policy challenge. The Government's recent reforms to the *Aged Care Act* will make aged care more equitable and sustainable and help to provide more services for older Australians.

While higher than many of our international counterparts, birth rates in Australia are at a record low and are expected to stay low through 2024–25. The Government is rolling out policies to make it easier for people to have children if they want to, including by taking the next steps in building a universal early education and care system, which will be a game changer for families.

The Government is determined to improve outcomes for Indigenous Australians. This Statement shows that there is still a lot of work to do, with life expectancy for First Nations people 8.8 years lower for men and 8.1 years lower for women than the general average.

The Government will draw on the evidence and insights from the 2024 Population Statement to inform future policy work so we can continue to build a better future for Australia.

Nick Latimer

Executive Director

Centre for Population

This year, the United Nations projected that the world's population would peak in 2084 at 10.3 billion people before falling due to the global decline in fertility. The 2024 Population Statement shows the contrast between Australia's long-term population prospects and the global outlook, with population growth in Australia expected to continue. This will be driven by migration, rising life expectancy, and a higher fertility rate than many other advanced economies.

Our ability to foresee and understand population changes is vital to preparing for the future. Since it was established in 2019, the Centre for Population has been building the evidence base on population trends and informing public discussion. The Centre has engaged, coordinated and collaborated with governments, as well as other stakeholders including academics, business, community groups and other population experts.

Over the past 12 months, the Centre has provided evidence to Senate inquiries on excess mortality and education services for international students. We have also published papers on Australia's changing demographics, fertility, population characteristics, and the economic outcomes of migration. Finally, we have made major improvements in the way we forecast fertility and migration. This includes implementing a leading indicator of births based on pregnancy scans data, developing better indicators of migration using administrative data from the Department of Home Affairs, and revising how we forecast state-level migration.

The 2024 Population Statement is the fifth edition of the Centre's flagship annual publication. It provides valuable insights on how the population has changed and projects future population changes. Compared to the 2023 Population Statement, the population outlook for 2034–35 remains around 31.3 million. However, the drivers of population growth have shifted. There will be higher net overseas migration in the near term, due to temporary migrants staying in Australia longer than they had previously. This will be offset by fewer births than previously expected, with the fertility rate dropping to a record low this year. There will also be more deaths than previously forecast, as COVID-19 remains a major contributor to excess mortality.

Although the Centre has used its best judgement in preparing these population projections, there have been significant interruptions to population trends in recent years, in particular the COVID-19 pandemic and the impacts of post-pandemic migration. This creates greater-than-usual uncertainty about the future and further revisions to our forecasts are likely.

In 2025, we will support the hosting of the International Population Conference in Australia for the first time. This prestigious event will bring experts from around the world to Brisbane to push forward the field of demography. We also look forward to continuing to build the evidence base on how the Australian population is changing and what this might mean for the future.

KEY POINTS

Australia's population is projected to grow from 27.1 million people in March 2024 to 31.3 million people by 2034–35. This is slightly higher than projected in last year's Population Statement.

Annual population growth is forecast to decline from 2.1 per cent in 2023–24 to 1.2 per cent by 2034–35 as net overseas migration (NOM) moderates.

NOM is the main driver of population growth and volatility. NOM peaked in 2022–23 and is declining. It is estimated to have fallen to 460,000 in 2023–24 and is expected to continue to moderate and then stabilise over the next few years. This reflects a decline and subsequent stabilisation of arrivals, and a pick-up in departures.

A range of policies are placing downward pressure on NOM, including restrictions on onshore visa transitions and improving integrity in the international education sector. Strong international student demand is being restrained by higher offshore visa refusal rates than before the pandemic with greater scrutiny of applications.

Australians benefit from migration through higher economic growth, more job creation, improved wages and productivity. There can also be fiscal benefits to migration. However, these need to be weighed against pressures such as those on housing, through a well-calibrated migration system.

Australia's fertility rate has been declining since the early 1960s, a pattern seen across advanced economies. The fertility rate is expected to remain at record lows in 2023–24 and 2024–25, due to shorter-term factors, as well as the longer-term social and economic changes behind the multi-decade decline in fertility. The fertility rate is projected to gradually return to, and stabilise at, 1.62 births per woman by 2031–32.

COVID-19 continues to contribute to higher mortality, accounting for 2.2 per cent of deaths in 2023–24. This was down from 4.1 per cent in 2022–23. The effect of COVID-19 on mortality is projected to continue declining over the next few years, with mortality rates returning to pre-pandemic trends from 2028–29 onwards.

The states and territories are projected to gradually return to their pre-pandemic population growth patterns. Capital cities and regional areas are likewise projected to return to familiar patterns of population growth in the coming years, reaching their long-term population trends by 2026–27.

Western Australia and Victoria are projected to be the fastest growing states, while Tasmania and South Australia are projected to be the slowest. The contribution of natural increase (births exceeding deaths) to population growth is projected to decline in all jurisdictions as the population ages. Natural decrease (deaths exceeding births) is expected outside the capital cities in Victoria, South Australia and Tasmania.

The combined population of capital cities is projected to continue to grow nearly twice as fast as rest-of-state areas through to 2034–35. Greater Brisbane is projected to be home to over half Queensland's population from 2025–26 for the first time since 1978. Having reassessed state-level overseas migration patterns, the Centre no longer projects Greater Melbourne's population to overtake Greater Sydney's by 2034–35.

Ageing will continue to present a demographic challenge, with the median age projected to increase from 38.3 years in 2022–23 to 40.0 years by 2034–35. The median age was 36.1 years just 20 years ago.

Tasmania has the highest median age, which is expected to increase by 4.4 years by 2034–35, compared to 1.4 years for New South Wales. The median age of people in capital cities is expected to increase by 1.4 years, compared to 2.7 years outside of capital cities. Hobart is projected to have the largest increase in median age to 2034–35 of any capital city, having overtaken Adelaide as the capital city with the oldest population in 2023–24.

1. NATIONAL POPULATION

1.1 OVERVIEW

The Australian population passed 27 million people during the March quarter 2024, broadly in line with the Centre for Population's forecasts in the 2023 Population Statement. The Centre expects the population to reach 28 million by 2025–26, 31.3 million by 2034–35 and 41.2 million by 2064–65 (Table 1 and Table 2).

The effects of the COVID-19 pandemic on Australia's population continue. Prior to the pandemic, population growth was 1.5 per cent in 2018–19 (Chart 1). Following the outbreak of COVID-19, international travel restrictions caused a net outflow of overseas migrants in 2020–21 reducing growth to 0.1 per cent, the lowest population growth in over 100 years. Once travel restrictions were lifted, population growth peaked at 2.5 per cent in 2022–23 as a result of a large catch-up in temporary migrant arrivals, particularly by international students.

Population growth is forecast to decline to 2.1 per cent in 2023–24 and gradually fall to 1.2 per cent from 2026–27 to 2034–35. Slowing growth is due to NOM declining and then stabilising. Record low fertility rates and elevated deaths due to COVID-19 are expected to weigh on population growth in the near term. Natural increase (births minus deaths) is not expected to return to its long-term trend until 2032–33.

Table 1. POPULATION OUTCOMES AND NEAR-TERM PROJECTIONS, AUSTRALIA

	2022–23	2023–24	2024–25	2025–26	2026–27
Population at 30 June (millions)	**26.7**	**27.2**	**27.7**	**28.0**	**28.4**
Population growth (per cent)	2.5	2.1	1.6	1.3	1.2
Population growth (thousands)	639	564	444	368	340
Natural increase (thousands)	103	104	102	110	116
Births	*291*	*289*	*288*	*297*	*305*
Deaths	*188*	*185*	*186*	*187*	*189*
Net overseas migration (thousands)	537	460	340	255	225
Overseas arrivals	*740*	*680*	*625*	*605*	*595*
Overseas departures	*204*	*220*	*285*	*350*	*370*
Median age (years)	38.3	38.3	38.4	38.5	38.7
Old-age dependency ratio	26.3	26.5	26.8	27.3	27.9

Note: The old-age dependency ratio is the ratio of the number of people aged 65 years and over to the number of people of aged 15 to 64.

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

Table 2. LONG-TERM POPULATION PROJECTIONS, AUSTRALIA

	2034–35	2044–45	2054–55	2064–65
Population at 30 June (millions)	**31.3**	**34.8**	**38.0**	**41.2**
Population growth (per cent)	1.2	1.0	0.8	0.8
Population growth (thousands)	365	342	314	313
Natural increase (thousands)	130	107	79	78
Births	*352*	*379*	*389*	*417*
Deaths	*222*	*273*	*310*	*338*
Net overseas migration (thousands)	235	235	235	235
Overseas arrivals	*595*	*595*	*595*	*595*
Overseas departures	*360*	*360*	*360*	*360*
Median age (years)	40.0	41.2	42.5	43.6
Old-age dependency ratio	30.8	32.9	35.8	39.4

Source: Centre for Population.

Chart 1. POPULATION GROWTH IN AUSTRALIA
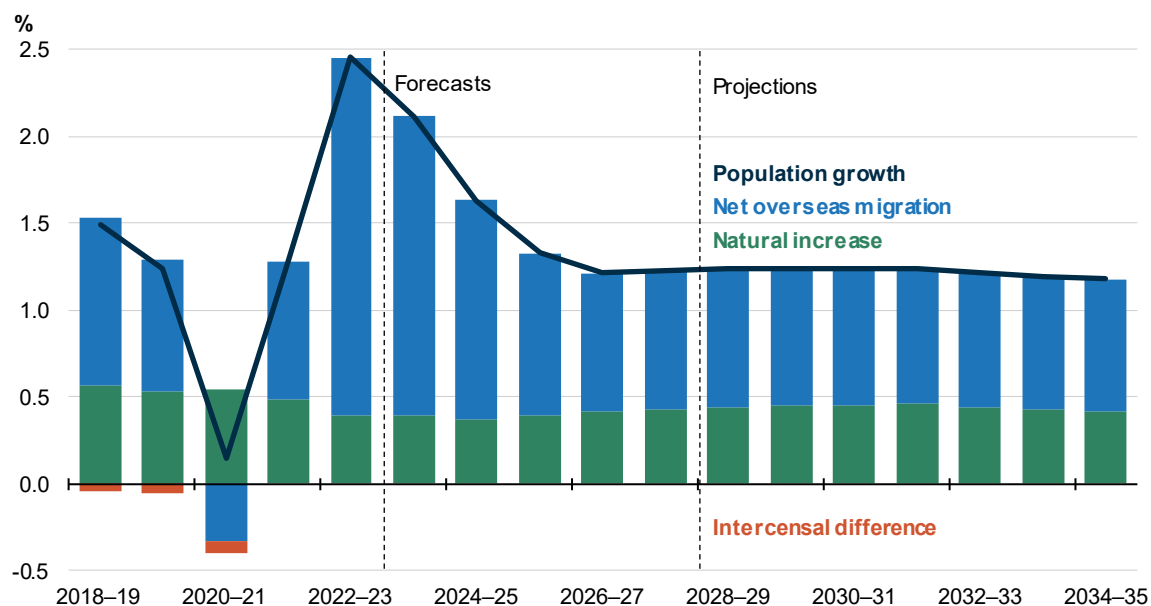
Note: Intercensal difference refers to the difference between the estimated resident population after incorporating the results of the 2021 Census and previously published estimates.

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

1.1.1 INTERNATIONAL POPULATION GROWTH

Recent population growth in Australia has been similar to Canada and New Zealand. These 3 countries have smaller populations and a higher contribution to growth from NOM, which means that they have more volatile growth rates than their larger counterparts, such as the US.[1]

In the 25 years prior to the pandemic, higher rates of NOM in Australia, New Zealand, and Canada resulted in their populations growing faster than the US, the UK, and the European Union (Chart 2). Between 1994 and 2020, Australia's population grew at an average rate of 1.4 per cent and New Zealand's grew at an average rate of 1.3 per cent per year. Canada reached annual growth of 1.6 per cent in the fourth quarter of 2019 due to an increase in NOM.

Population growth in advanced economies fell as international travel restrictions limited global migration. Australia, New Zealand and Canada all experienced particularly sharp declines, with Australia's growth falling to levels similar to the UK and the US.

The subsequent easing of restrictions released pent-up demand for international migration. Australia, New Zealand and Canada reopened their borders over 2021–22 and all subsequently recorded their highest population growth rates in decades, peaking at 2.6, 3.0 and 3.2 per cent respectively.

Since peaking, population growth in all 3 countries is now easing. Annual growth in New Zealand has been falling since the December quarter of 2023. With migration policy tightening, Canadian population growth has also begun to decline, with slowing growth in non-permanent residents.

Chart 2. ANNUAL POPULATION GROWTH OF SELECTED COUNTRIES AND THE EUROPEAN UNION
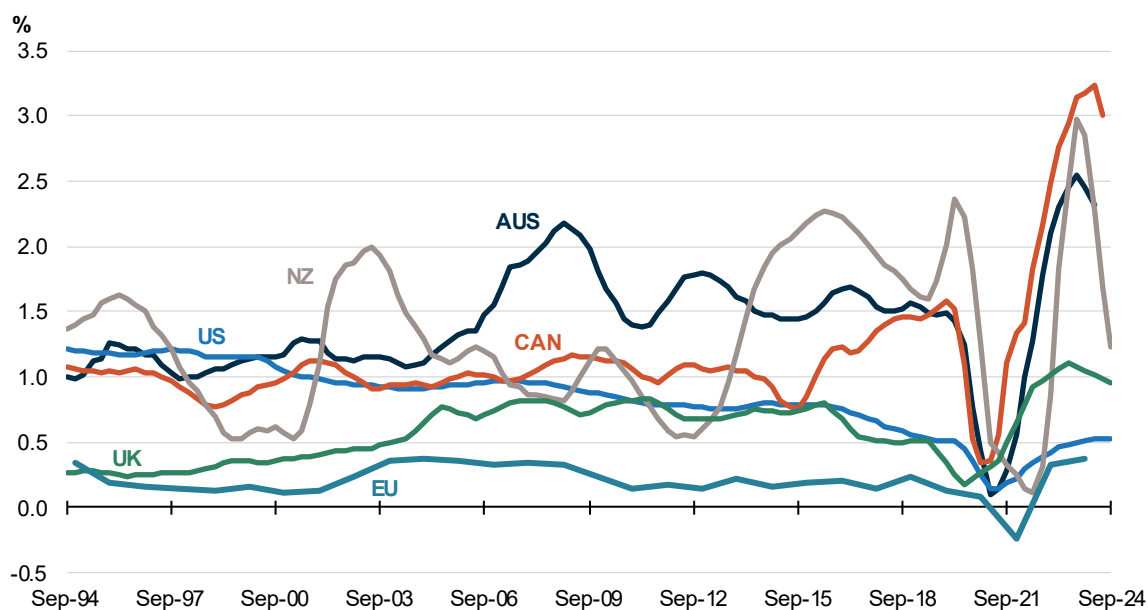
Note: Latest data available varies by jurisdiction. EU line excludes the UK and has adjusted the population of Germany in 2011 to avoid 2011 Census rebase.

Source: ABS; Stats NZ; Statistics Canada; Office for National Statistics (ONS); US Bureau of Economic Analysis; Eurostat.

1 NOM made a smaller contribution to population growth in the other jurisdictions resulting in lower average growth between 1994 and 2020 in the United States (0.9 per cent), the UK (0.6 per cent) and the EU (0.2 per cent).

The United Nations projects that the global population will begin to decline in 2085. Some countries are already experiencing population decline, including China, the Republic of Korea, Japan and the Russian Federation. India surpassed China to become the world's most populous country in 2022. China's population is expected to fall from its peak of 1.4 billion in 2023 to 633 million by 2100, while India will fall from its peak of 1.7 billion in 2061 to 1.5 billion in 2100. In contrast, the UN projects Australia's population to still be growing in 2100, the end of its projection period.

1.1.2   POPULATION AGEING

The age structure of Australia's population has changed significantly over the past 40 years. The share of people aged 65 years and over has doubled in that time, reflecting the ageing population (Chart 3). Australia's age distribution is influenced by 3 factors: a declining fertility rate, increasing life expectancy and the level and age composition of migrants.

Chart 3.   THE PROPORTIONAL AGE STRUCTURE OF AUSTRALIA'S POPULATION
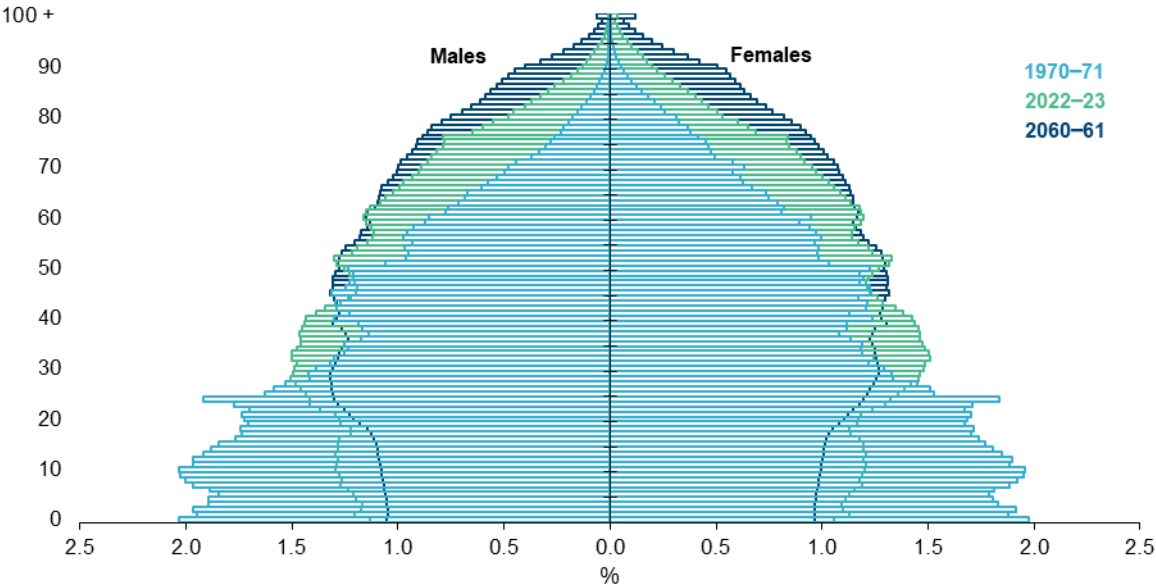
Source: ABS, *National, state and territory population*, March 2024; and Centre for Population.

Australia's median age increased from 27.5 years in 1970–71 to 38.5 in 2021–22. The national median age then fell from 38.5 in 2021–22 to 38.3 in 2022–23. This was the largest annual fall since the 1960s, reflecting the high level of NOM, with recent migrants tending to be younger on average than the existing population. This followed a record annual rise of 0.5 years in 2020–21, when border closures saw a net migration outflow.

The old-age dependency ratio is defined as the ratio of the number of people aged 65 years and over to those aged 15 to 64 years. In 2022–23, this ratio was 26.3, having grown from 15.3 in 1983–84. This increase will present fiscal challenges as demand for services such as aged care and healthcare increases, while Australia's tax base shrinks.[2]

The ageing of Australia's population will continue – the median age is projected to increase by 5.3 years between 2022–23 and 2064–65, to reach 43.6 years. By 2064–65, the share of the population aged 65 and over is projected to reach 24.0 per cent, up from 17.3 per cent.

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2   Commonwealth of Australia, *2023 Intergenerational Report.*

1.1.3 CHANGE TO POPULATION PROJECTIONS SINCE THE 2023 POPULATION STATEMENT

Since the 2023 Population Statement, the population projection for 2034–35 has been revised up by 7,000 people (0.02 per cent) driven by higher expected NOM, which is largely offset by fewer births (Chart 4). Births are forecast to be cumulatively lower by 150,000 over 2022–23 to 2034–35. Conversely, NOM is expected to decline more slowly than previously thought, contributing 165,000 more people than in the 2023 Statement over the same period. The median age in 2034–35 is 0.07 years higher than projected in the 2023 Statement, reflecting the lower births forecast.

Chart 4. CHANGE IN PROJECTED POPULATION GROWTH COMPARED TO THE 2023 POPULATION STATEMENT
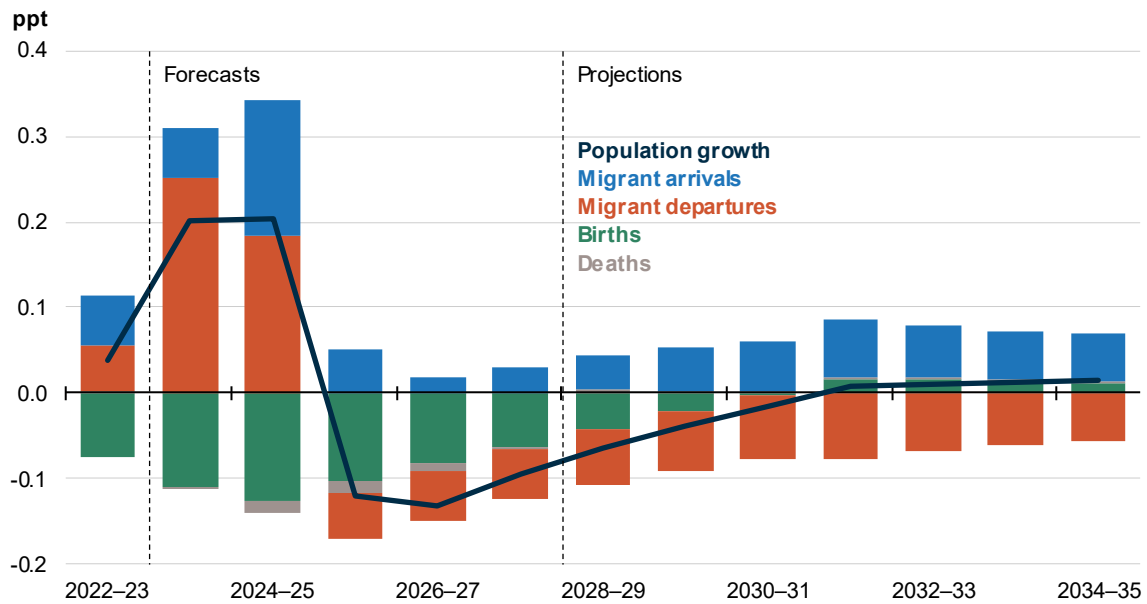
Note: Positive departures/deaths indicate a downwards revision and higher population growth, and negative departures/deaths indicate an upwards revision and lower population growth.

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

BOX 1. POPULATION OUTCOMES COMPARED TO PRE-PANDEMIC PROJECTIONS

Australia's population is lower than was projected prior to the pandemic. The national population in 2023–24 is expected to be 330,000 (1.2 per cent) lower than was projected in the 2019–20 Mid-Year Economic and Fiscal Outlook (MYEFO), the last Government population projection prior to the pandemic (Chart 5). This reflects an expected 345,000 fewer births between 2018–19 and 2023–24 than was projected in the 2019–20 MYEFO, which used a higher fertility assumption than has since been realised.

Through to the end of 2021–22, NOM was 449,000 lower than projected at the 2019–20 MYEFO, due to pandemic-era border closures. With the catch up in migration over 2022–23 and 2023–24, NOM is now expected to be around 85,000 or 5.7 per cent higher over 2018–19 to 2023–24 than projected at the 2019–20 MYEFO.

Chart 5. POPULATION OUTCOMES COMPARED TO THE 2019–20 MYEFO
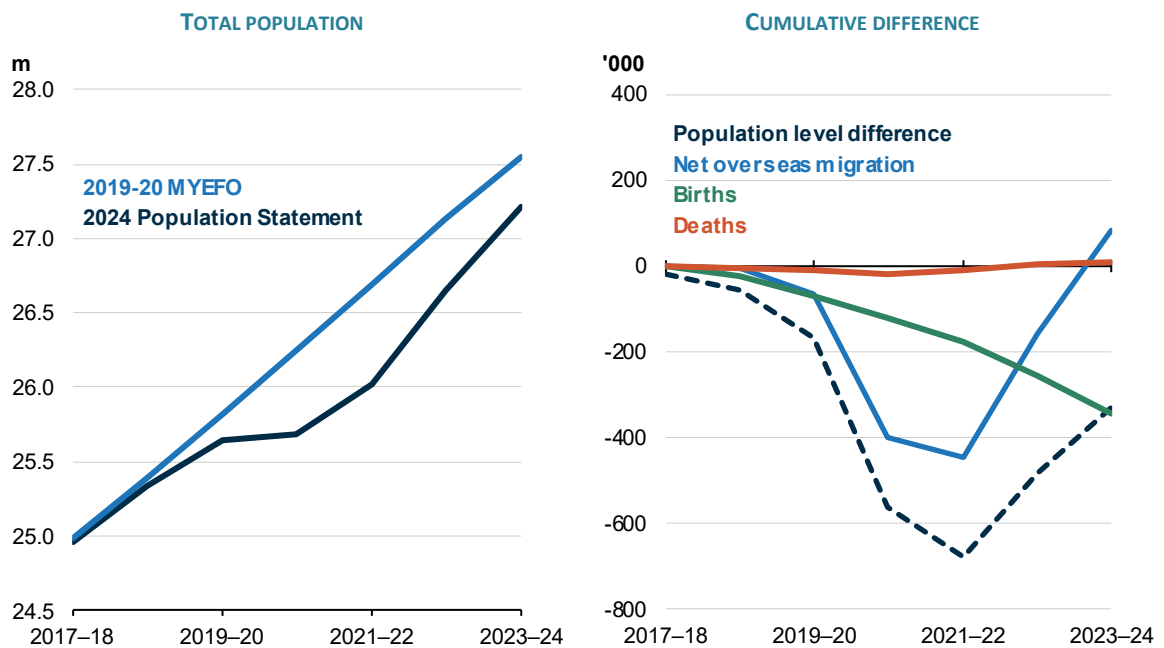
Note: 2023–24 consists of 3 quarters of estimates and one quarter of forecasts. Components do not sum to total population change due to ABS revisions.

Source: ABS, *National, state and territory population*, March 2024; the Commonwealth of Australia, MYEFO 2019–20; and Centre for Population.

In the current projections, population growth is expected to be lower than the 2019–20 MYEFO projections from 2025–26, driven by the lower fertility assumption. By 2030–31, the population is expected to be 645,000 (2.1 per cent) lower than projected in the 2019–20 MYEFO. This is driven by 886,000 fewer births, partly offset by 315,000 additional NOM. Deaths are projected to be slightly higher than in the 2019–20 MYEFO (14,000), reflecting the impact of the COVID-19 pandemic.

BOX 2.   COMPARISON TO UN POPULATION PROJECTIONS FOR AUSTRALIA

This year, the United Nations published the *World Population Prospects 2024*, a biennial report providing global population projections to the end of the century. By 2064–65, the UN projects the Australian population will be 35.6 million, whereas the Centre for Population projects 41.2 million.

Although both the UN and the Centre forecast slowing Australian population growth over time, there is a large difference between the projections. The largest difference is in 2023–24, for which the UN's projected annual growth is half the Centre's projection (1.0 per cent and 2.1 per cent). The difference narrows over time with the UN and the Centre projecting 0.6 and 0.8 per cent growth by 2064–65 (Chart 6).

The main difference between the projections is the NOM assumptions. The UN assumes NOM will gradually increase over the projection period, from 139,000 to 174,000. This assumption corresponds to the average level observed between 1994–95 and 2014–15. By comparison, the Centre for Population uses a long-term migration assumption of 235,000 (Appendix – Section 3.1.1).
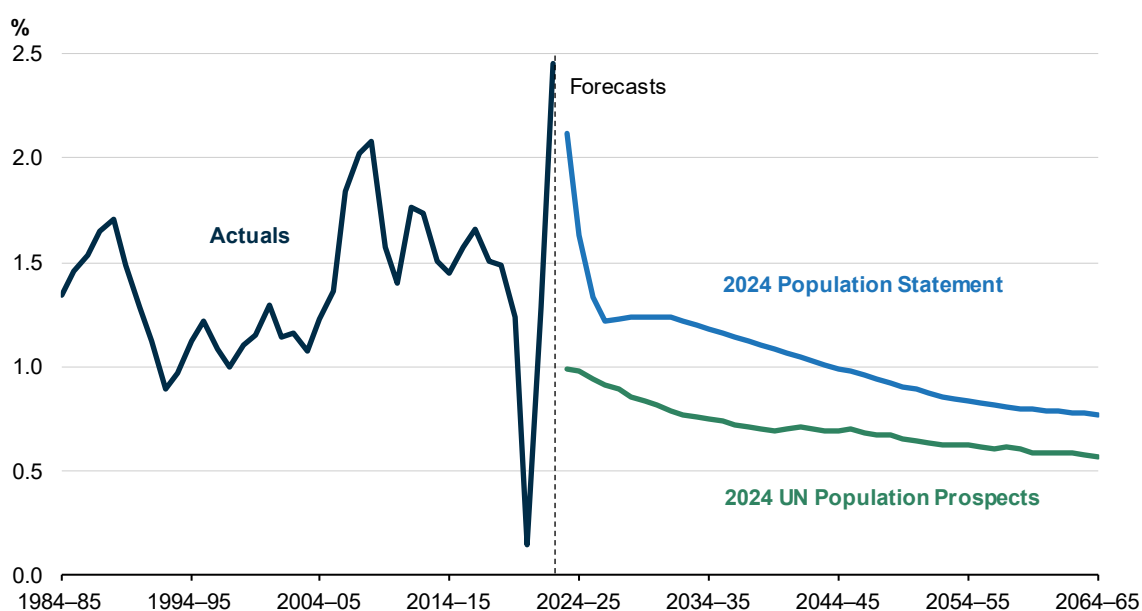
Chart 6.   AUSTRALIAN POPULATION GROWTH, UN AND POPULATION STATEMENT COMPARISON

Source: ABS, *National, state and territory population, March 2024*; United Nations, *World Population Prospects 2024*; and Centre for Population.

Due to the higher projected NOM, the Centre for Population also expects a larger young adult population in Australia which results in 70,000 more births per year by 2064–65. This is despite the UN assuming broadly the same total fertility rate (1.6 from 2025–26 onwards) as the Centre.

A recent *Lancet* article projected lower total fertility rates for Australia than both the UN and the Centre.[3] The *Lancet* article predicts fertility will fall to 1.45 babies per woman by 2050, compared to 1.62 in the Centre's long-run forecast (from 2031–32 onwards). The article does not describe the specific factors behind its projection for Australia, but attributes the global fertility decline to contraceptive use, higher education attainment, declining child mortality rates, and population size in habitable areas.

1.1.4 FIRST NATIONS POPULATION

According to the 2021 Census-based estimated resident population, there were 984,000 First Nations people, representing 3.8 per cent of the total Australian population.[4] Of these, 41 per cent lived in major cities, 44 per cent in regional areas, and 15 per cent in remote areas. By comparison, 26 per cent of the total Australian population lives in regional areas, and just 2 per cent in remote areas.[5] However, it has been difficult to measure First Nations populations due to undercounting in remote Australia, and people identifying their First Nations background in the Census where they previously had not (which is termed identification change).

The First Nations population generally grows faster than the total population. Between 2010–11 and 2020–21, the First Nations population grew at an annual rate of 2.0 per cent, above the total Australian rate of 1.4 per cent (Chart 7). While Australia's population growth is mostly affected by fluctuations in overseas migration, the First Nations population grows through strong natural increase and non-demographic factors such as more Australians identifying as First Nations, and changes in Census coverage and response. These non-demographic factors accounted for 39 per cent of the observed First Nations population growth between the 2011 and 2016 Censuses, and 57 per cent of growth between the 2016 and 2021 Censuses.

The ABS produces First Nations population projections every 5 years. The most recent ABS projections suggest that the First Nations population is now over 1 million and is expected to reach 1.2 million by 2030–31.[6] The ABS is projecting that higher fertility rates, relative to non-Indigenous Australians, will drive the First Nations population to grow faster than the total Australian population to 2030–31 (averaging 1.8 and 1.4 per cent respectively).[7] The current ABS projections assume no identification change, only demographic change, which represents some upside risk to the projected growth in the First Nations population. In the first half of 2025, the ABS will release an additional projection series including an identification change assumption.

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3   The Lancet, *Global fertility in 204 countries and territories, 1950–2021, with forecasts to 2100*, 2024.

4   ABS, *Estimates of Aboriginal and Torres Strait Islander Australians, 2021*.

5   ABS, *Regional population, 2022–23*.

6   The ABS produced 3 main series to provide a range of projections for analysis. These series are referred to as high, medium and low projections. The analysis in this section is based on the medium projection.

7   The analysis in this section compares First Nations population projections to the medium series of total Australian population projections in the ABS *Population Projections, Australia, 2022–2071*.

Chart 7.   FIRST NATIONS POPULATION GROWTH
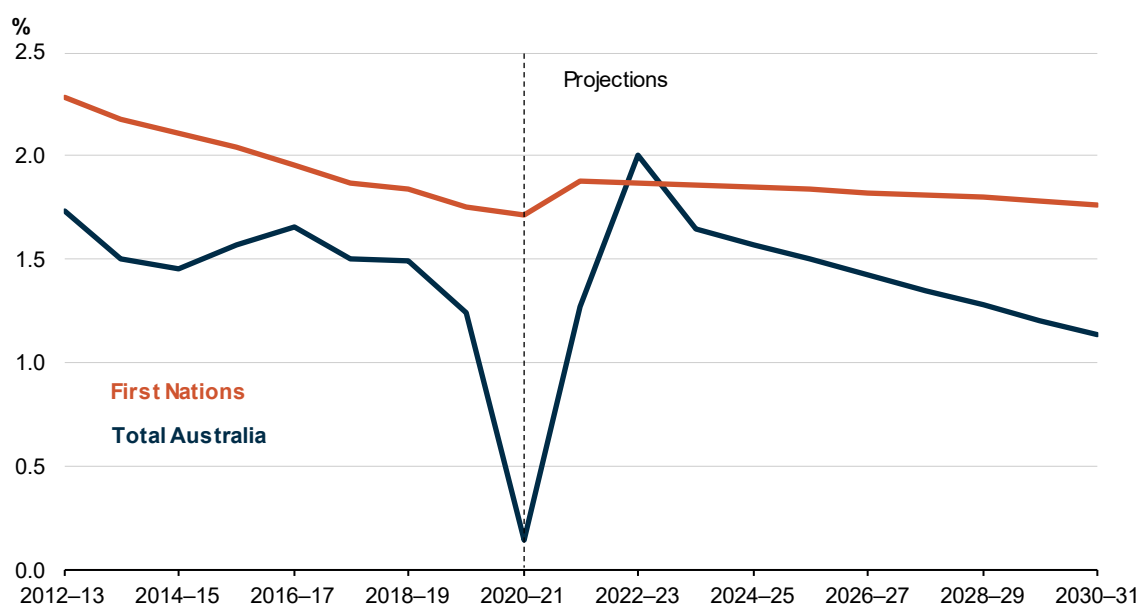
Source: ABS, *Estimates and Projections, Aboriginal and Torres Strait Islander Australians, 2011 to 2031*; ABS, *Historical Population*; and ABS, *Population Projections, Australia, 2022–2071*.

There were 25,000 First Nations children born in 2023, an increase of 1.4 per cent from 2022.[8] The total fertility rate for First Nations women was 2.17 babies per woman, which is similar to 2022 (2.16). First Nations women under the age of 30 years have higher age-specific fertility rates than non-Indigenous women, while those 30 and over have lower age-specific fertility rates than non-Indigenous women. The ABS projects the total fertility rate for First Nations women will decline to 1.89 by 2030–31, remaining higher than for all Australian women.[9]

However not all First Nations children are born to a First Nations mother. In 2022, 31 per cent of First Nations births occurred where only the father identified as a First Nations person.[10] As such, the ABS's First Nations population projections also consider the total paternity rate – the average number of children born to a First Nations father where the mother's Indigenous Australian status is either non-Indigenous or not stated. This differs from the fertility rate, which measures the birth rate for First Nations mothers, where fathers are either First Nations or non-Indigenous. The ABS assumes a First Nations paternity rate of 1.03 births per father, based on the paternity rate for First Nations men between 2010–11 and 2021–22.

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8   ABS, *Births, Australia, 2023*.

9   The First Nations total fertility rate projections in ABS *Estimates and Projections, Aboriginal and Torres Strait Islander Australians (2011 to 2031),* are based on *Births, Australia, 2022*, which uses 2016 Census-based projections. Comparatively, *Births, Australia, 2023* uses 2021 Census-based data, and estimates a far lower total fertility rate for the First Nations population.

10   A further 23 per cent of First Nations births had both parents identify as First Nations, while for 45 per cent only the mother identified as First Nations.

There is more to do to close the gap in life expectancy by 2031. For the 2020–22 period, First Nations life expectancy was 71.9 for men (8.8 years less than non-Indigenous men) and 75.6 for women (8.1 years less than non-Indigenous women). Increases in life expectancy reflect lower mortality rates for infants and those over 45 years of age.[11] The ABS assumes improvements in life expectancy will continue, increasing by 0.15 years for men and 0.10 years for women annually through to 2030–31, equivalent to the rate of improvement for the total Australian population over the past 10 years.

Due to higher fertility rates and the gap in life expectancy, the First Nations population has a much younger age structure compared to the rest of Australia (Chart 8). The First Nations population had a median age of 24.0 years compared to 38.4 years for the national population in 2020–21. By 2030–31, the ABS projects the median age of the First Nations population will be around 25.7 years, compared with their projection of 40.2 years for the total population.

Chart 8.   ESTIMATED AND PROJECTED POPULATIONS, BY AGE GROUP
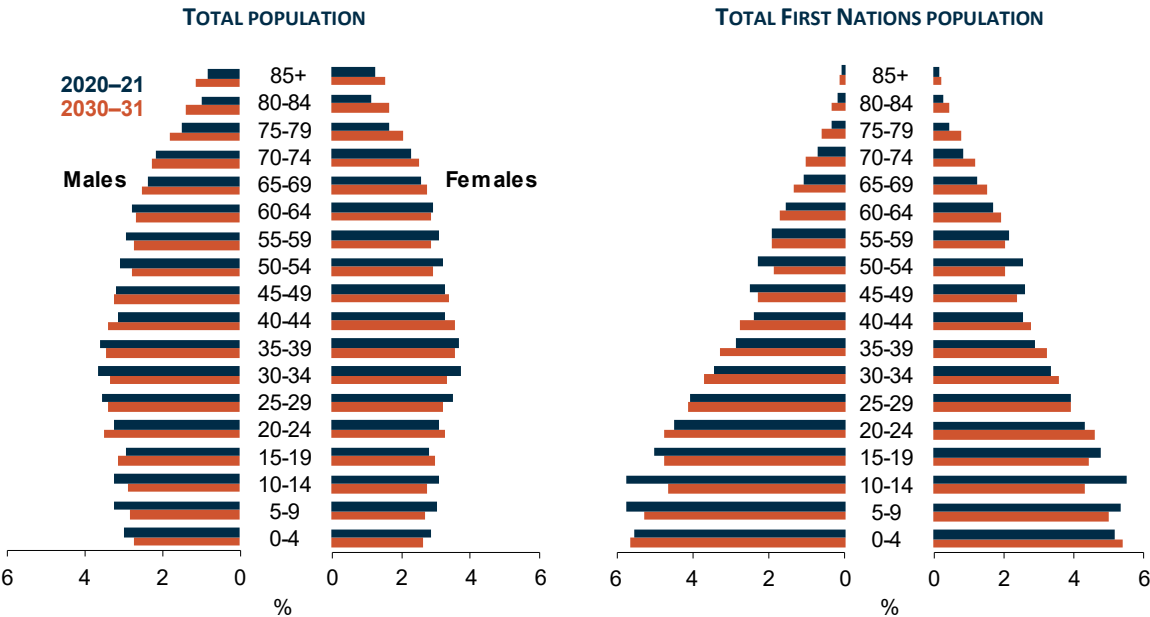
Source: ABS, *Estimates and Projections, Aboriginal and Torres Strait Islander Australians, 2011 to 2031*.

1.2 NET OVERSEAS MIGRATION

1.2.1   OVERVIEW

Australia has a history of strong migration and population growth. As of June 2023, 30.7 per cent of Australia's population was born overseas.[12] Switzerland and Luxembourg are the only OECD countries with higher shares of overseas-born populations. The Australian migration program attracts some of the most educated migrants in the OECD – supplying labour and bringing skills to meet workforce needs. Migrants promote growth and increase productivity, including through innovation and firm creation (Box 4).

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11 ABS, *Estimates and Projections, Aboriginal and Torres Strait Islander Australians, 2011 to 2031.*

12 ABS, *Australia's Population by Country of Birth, Jun 2023*.

NOM peaked in 2022–23 at 537,000. This reflected a catch up from very low migration during the pandemic, a surge in global demand for international study and a strong domestic labour market. NOM is expected to have fallen to 460,000 in 2023–24, primarily due to lower migrant arrivals by those on temporary visas, particularly students. By contrast, New Zealand citizen arrivals have continued to rise in 2023–24, likely driven by the stronger Australian labour market. Migrant departures on temporary visas have started to pick up for some visa groups, but overall have remained similar to 2022–23 levels.

NOM is expected to continue to decline through to 2026–27 (Table 3 and Chart 9). This will be driven, in part, by further falls in migrant arrivals, which are expected to stabilise from 2025–26. Departures of temporary visa holders are expected to pick up from 2024–25 and remain elevated, as those migrants who arrived shortly after border restrictions were lifted approach the expiry of their visas.

Departures of temporary migrants are now expected to be lower in 2023–24 and 2024–25 than in the 2023 Population Statement. This is due to people on temporary visas being motivated to remain in Australia, as indicated by high numbers of onshore visa applications. This reflects our relatively strong labour market and high living standards, and that migrants who remained during border closures have developed strong ties to Australia. Further delaying potential departures is the increase in wait times of onshore student visa processing, and a large number of people seeking review of visa decisions by the Administrative Review Tribunal.[13] Depending on their visa conditions, those applying for another visa from within Australia can continue to work and study in Australia while they await the outcome of their reviews.

Government policies are placing downward pressure on NOM. The policy environment for temporary visa holders has changed over the past year, including limiting visa applications for people already in Australia, and measures to improve integrity in the international education sector. There has also been a modest reduction in the size of the Permanent Migration Program to 185,000 places in 2024–25, from 190,000 in 2023–24.

Table 3. NET OVERSEAS MIGRATION FORECASTS BY VISA GROUP

	2022–23	**2023–24**	**2024–25**	**2025–26**	**2026–27**	**2027–28**
Australian citizen	-31,000	-25,000	-25,000	-15,000	-15,000	-15,000
New Zealand citizen	26,000	35,000	35,000	20,000	15,000	15,000
Permanent	60,000	70,000	65,000	70,000	70,000	70,000
Student	263,000	180,000	140,000	115,000	85,000	85,000
All other temporary	218,000	195,000	125,000	70,000	65,000	70,000
Total	**537,000**	**460,000**	**340,000**	**255,000**	**225,000**	**225,000**

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

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13 The Administrative Review Tribunal commenced operation on 14 October 2024 and replaced the Administrative Appeals Tribunal. All appeals in the Administrative Appeals Tribunal automatically transferred to the new Tribunal.

Chart 9. NET OVERSEAS MIGRATION FORECASTS BY VISA GROUP
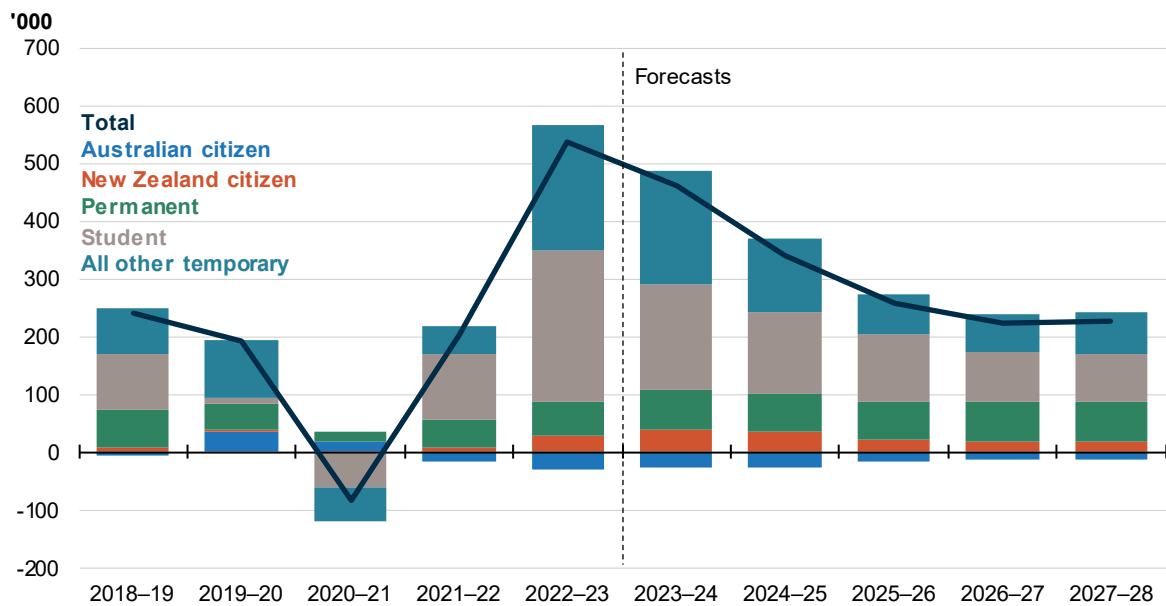
'000

Legend:
Total
Australian citizen
New Zealand citizen
Permanent
Student
All other temporary

Forecasts

X-axis: 2018–19, 2019–20, 2020–21, 2021–22, 2022–23, 2023–24, 2024–25, 2025–26, 2026–27, 2027–28

Y-axis: -200, -100, 0, 100, 200, 300, 400, 500, 600, 700

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

1.2.2   TEMPORARY MIGRANT ARRIVALS

Migrant arrivals across almost all temporary visa groups were high in 2022–23 following the reopening of international borders and fell in 2023–24 (Chart 10).

Students account for the largest share of temporary visa migrant arrivals. Student visa holders made up 50 per cent of temporary visa migrant arrivals in 2022–23. This is around the historical average, which is expected to persist to 2027–28. The strong demand to study in Australia is being moderated by higher offshore visa refusal rates compared to pre-pandemic rates.

The number of student visa holders in Australia increased to 675,000 in September 2024, around 40,000 higher than the pre-pandemic high of 634,000 (Chart 11).[14] In addition, people can study when on bridging visas while awaiting a decision on a student visa application. In 2024, there has been a backlog of over 100,000 onshore student visa applications, many of whom are on a bridging visa. These people will not be counted in the published numbers of student visa holders in Australia unless their student visa is granted.

Working holiday migrant arrivals have been elevated in 2023–24 and are expected to remain high in 2024–25. Notably, working holiday makers have been staying in Australia longer than they were before the pandemic, with a greater share staying over 12 months. The strength in the Australian labour market is likely a driving factor.

1.2.3   TEMPORARY MIGRANT DEPARTURES

Migrants who are temporary visa holders have been departing Australia at lower rates than pre-pandemic. This has contributed to higher NOM in 2022–23 and 2023–24. Departures have started to increase as more people, having arrived shortly after border restrictions were lifted, approach the expiry of their visa. This is particularly the case for working holiday makers who tend to have shorter stays. However, it will take time for departures to increase as the majority of arrivals were new students who are yet to complete their studies.

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14 Department of Home Affairs, *Temporary visa holders in Australia, September 2024*.

The Centre does not expect a sharp increase in departures of temporary visa holders that would mirror the sharp increase in arrivals when border restrictions were lifted. Visas permit varying lengths of stay in Australia, and some migrants will obtain a subsequent temporary visa or a permanent visa.

In 2022–23, a high number of 625,000 temporary visas were granted to temporary visa holders already onshore, which indicates continued demand to stay in Australia. As a proportion of the temporary visa holders onshore, the transition rate to new temporary visas was also at a record high. Onshore transitions to temporary visas fell to 400,000 in 2023–24. This was still higher than pre-pandemic levels, but reflects a larger population of temporary visa holders, with the transition rate returning to pre-pandemic trends. Policy measures to remove or limit onshore visa transitions, particularly to a new student visa, will mean some people will depart who would otherwise have remained in Australia.

Student departures have been low, particularly in 2022–23. This is partly because many students who arrived after borders reopened are yet to complete their studies. Further, there was a significant increase in the transition rate to temporary graduate visas in 2022–23. The transition rate has moderated in 2023–24 to around pre-pandemic levels. Changes to temporary graduate visas from 1 July 2024, including reducing the length of stay and further age restrictions, are expected to further moderate the number of temporary graduate visas granted in the future.

Many temporary visa holders are also appealing visa refusals while onshore, which can prolong their stay in Australia. Even unsuccessful appeals have the effect of delaying departures. Between April and September 2024, the median time taken by the Administrative Appeals Tribunal (now replaced by the Administrative Review Tribunal) to complete reviews of student visa refusals was 11 months.[15]

Chart 10. TEMPORARY MIGRANT ARRIVALS AND DEPARTURES, **2024** POPULATION STATEMENT COMPARED TO **2023** POPULATION STATEMENT
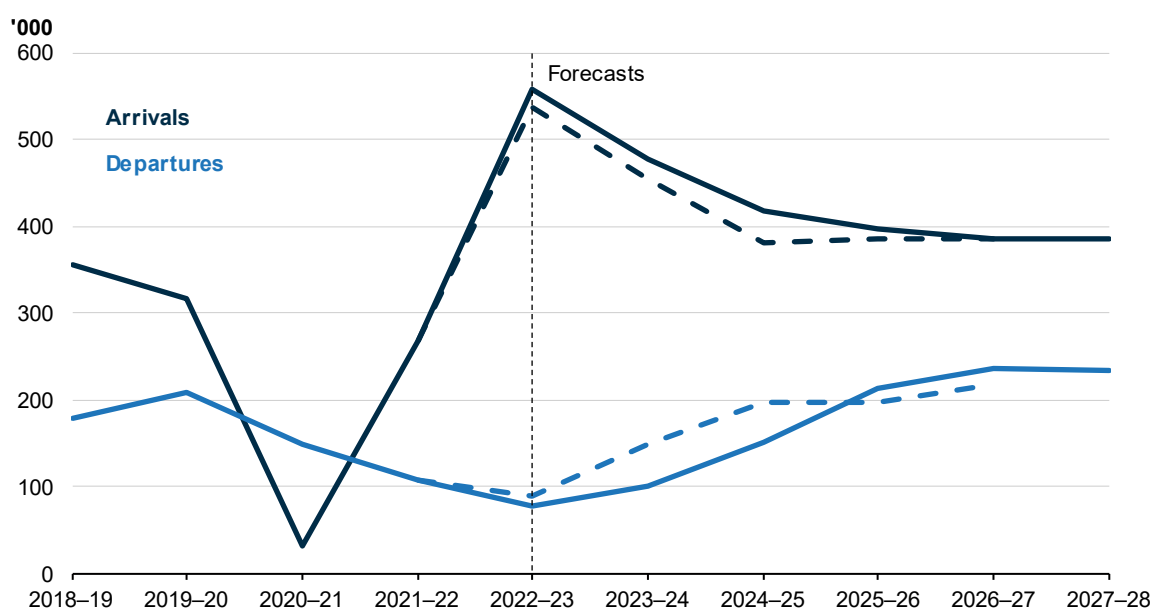

Note: 2024 Population Statement is shown using solid lines and 2023 Population Statement is shown using dashed lines.

Source: *2023 Population Statement*; ABS, *National, state and territory population, March 2024*; and Centre for Population.

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15 Administrative Review Tribunal, *Processing times for the former AAT's Migration and Refugee Division*, 2024.

Chart 11. NUMBER OF TEMPORARY VISA HOLDERS IN AUSTRALIA, BY CATEGORY
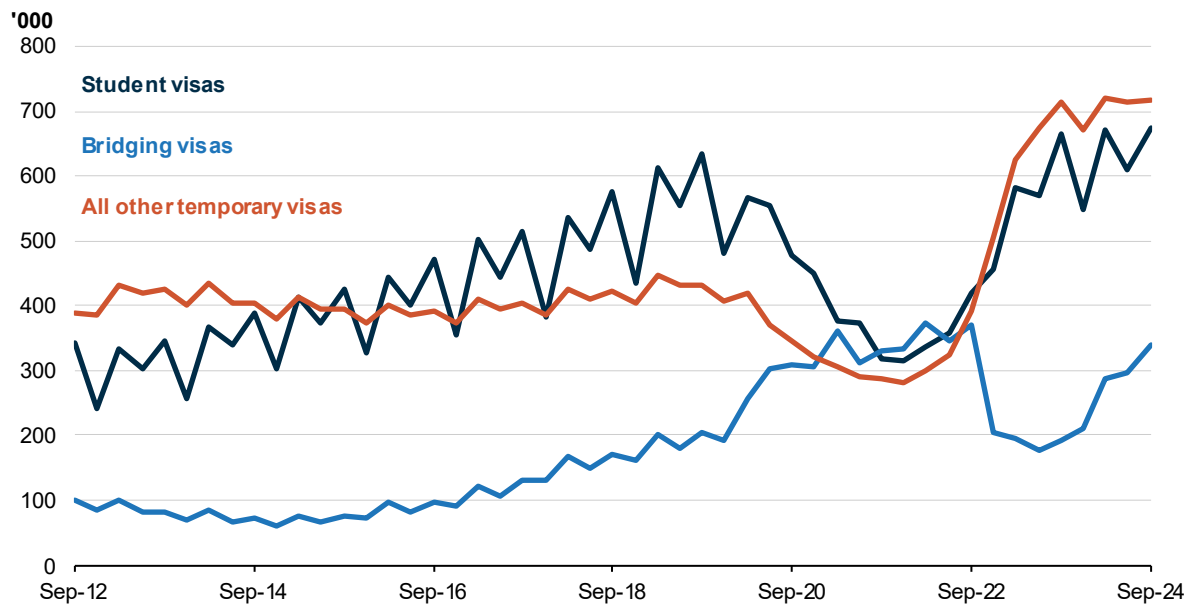
Note: Excludes people on Visitor, Crew and Transit and Special Category (for New Zealand citizens) visas.
Source: Department of Home Affairs, *Temporary visa holders in Australia, September 2024.*

1.2.4 PERMANENT MIGRANTS, NEW ZEALAND AND AUSTRALIAN CITIZENS

NOM of permanent visa holders, which does not include Australian and New Zealand citizens, is expected to be 65,000 in 2024–25 and then return to its historical average of 70,000. Permanent visa migrant arrivals are largely controlled by the number of permanent visas granted to people living outside Australia (Box 3). A small and stable number of permanent visa holders depart each year.

NOM of New Zealand citizens has been increasing since 2020–21 and is expected to peak in 2023–24 at its highest level since 2012–13, before declining and stabilising by 2026–27. New Zealand citizens can make Australia their home indefinitely and are entitled to Medicare, student loans and various government payments including the Age Pension. New Zealand currently has a higher unemployment rate than Australia, which historically is associated with more New Zealand migrant arrivals (Chart 12).

NOM of Australian citizens is historically negative. It became positive during the pandemic as Australian citizens returned from overseas. When borders reopened, departures increased and the net outflow of Australian citizens reached a high of 31,000 in 2022–23. It is expected to steadily return to 15,000 in 2025–26, its long-term trend level.

Chart 12. NEW ZEALAND CITIZEN MIGRANT ARRIVALS AND UNEMPLOYMENT RATE DIFFERENCE BETWEEN AUSTRALIA AND NEW ZEALAND, QUARTERLY
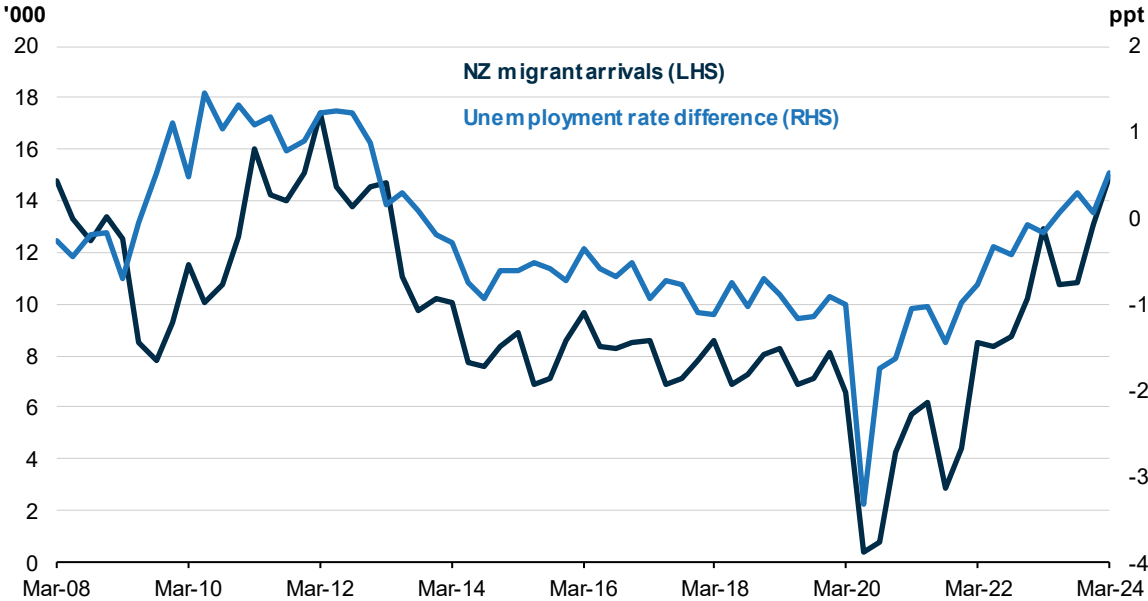
Note: Unemployment rates are seasonally adjusted. A positive unemployment rate difference means that Australia's unemployment rate is lower than New Zealand's.

Source: Stats NZ; ABS, *National, state and territory population, March 2024*; and ABS, *Labour Force, Australia, September 2024.*

BOX 3. THE RELATIONSHIP BETWEEN THE PERMANENT MIGRATION PROGRAM AND NET OVERSEAS MIGRATION

NOM is a statistical concept that measures the flow of migrants on permanent and temporary visas, and Australian and New Zealand citizens into and out of Australia's population. From 2007–08 to 2018–19, around one-third of NOM was in the permanent visa category.

The Permanent Migration Program is a narrower migration policy concept than NOM. It is the main pathway to permanent residency in Australia, and includes skilled, family, and special eligibility permanent visas. The Government sets the number of places available each financial year, with the 2024–25 planning level set at 185,000 places. An additional 20,000 permanent visas are available in 2024–25 through the Refugee and Humanitarian Program.

Many individuals who are granted a permanent visa are not counted in NOM as a permanent migrant arrival. This is because many permanent visas are granted to individuals who are already in Australia on a temporary visa – in 2022–23, this was around 60 per cent of the 195,000 Permanent Migration Program visa grants. These people would have already been counted as a migrant arrival when they first arrived in Australia on a temporary visa. This means that changes to the size of the Permanent Migration Program do not result in equivalent changes to the level of NOM.

During periods when migrant arrivals are growing, and outpacing departures, there is a larger gap between NOM and permanent visa grants (Chart 13). The surges in arrivals are caused by demand-driven temporary visas, weakening the relationship between permanent visa grants and NOM.

Chart 13.   NOM (EXCLUDING AUSTRALIAN AND NEW ZEALAND CITIZENS) AND PERMANENT VISA GRANTS
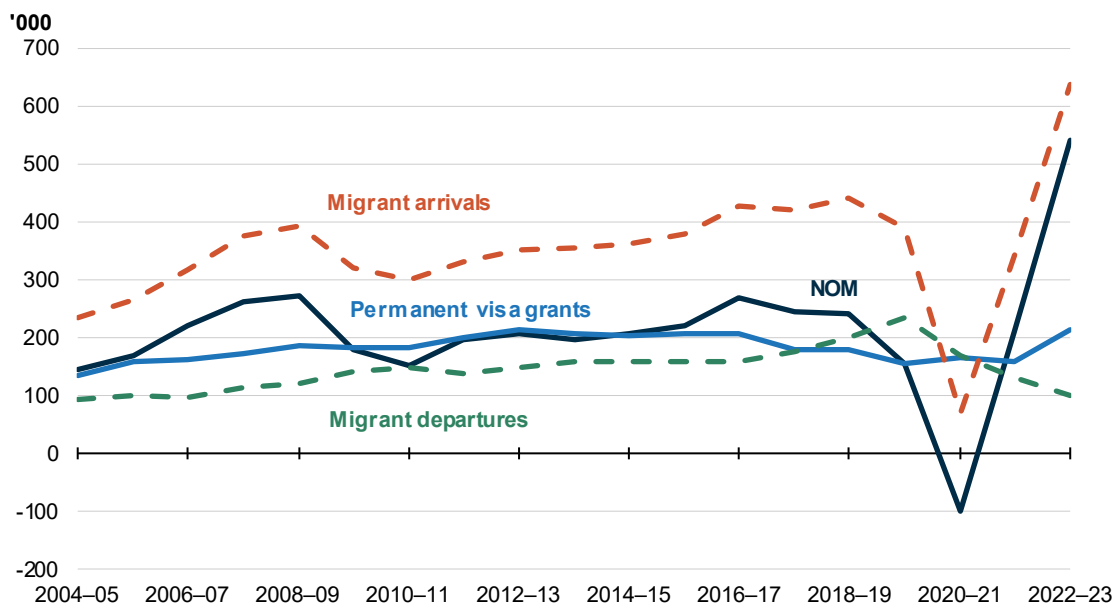
Note: Excludes permanent visa grants not under the Permanent Migration Program or Refugee and Humanitarian Program.

Source: Department of Home Affairs; and ABS, *National, state and territory population, March 2024.*

BOX 4.   RECENT RESEARCH ON THE ECONOMIC EFFECTS OF MIGRATION

Recent research has advanced the Centre's understanding of the effects of migration on the economy, including on the labour market, productivity, and the fiscal benefits of migration. The research also notes the challenges migration can create.

MIGRATION AND THE LABOUR MARKET

Migrants supply labour and bring skills where Australia has shortages. The Australian migration program attracts migrants who are among the most educated in the Organisation for Economic Co-operation and Development (OECD). This is essential in supporting economic opportunities in existing and developing industries, including for the net zero transformation.

Australian workers can benefit from migration through higher economic growth and job creation driven by higher demand for goods and services. The Centre for Population partnered with the OECD to research the effects of migration on Australia's economy. This research found:

- Geographic areas with higher shares of migrants have higher employment rates of Australians. A one percentage point rise in the annual migrant inflow (measured as share of the total population), on average, leads to a 0.5 per cent increase in the employment of the Australian-born population; Australian-born people of all skill levels, ages or genders benefit from this positive effect.[16]
- Migrants to Australia are typically highly-educated and well-placed to integrate into the labour market.

However, migrants are slightly less likely to be employed than Australians due to lower labour force participation among migrant women.

- Over the past decade, the labour force participation rate of migrant women in Australia ranged between 66 per cent and 69 per cent, whereas the participation rate of women generally ranged between 73 per cent and 77 per cent.[17]
- The lower labour force participation among migrant women may stem from restrictions related to specific visa statuses, limited language proficiency, and cultural differences (including child care and domestic responsibilities).

Lower labour force participation among migrant women suggests there is untapped potential within the existing migrant population in Australia.

An objective of the Government's Employment White Paper is overcoming barriers to employment and broadening opportunity, including economic equality for women from all walks of life, including migrants.

MIGRATION AND PRODUCTIVITY

In addition to skills, migrants bring new ideas and increase productivity through innovation, specialisation, and firm creation. The OECD analysed these linkages further and found that on average:

- Wages in areas with larger migrant shares are higher (a 10 per cent larger migrant share is associated with a 1.3 per cent larger regional wage difference), which suggests a positive link between migration and labour productivity.[18]
- A one percentage point increase in an area's employment share of higher-educated migrants (those with at least a university degree) leads to a 6.6 per cent rise in patent applications in the medium run (5 years) in that area.

continued over next page

FISCAL BENEFITS OF MIGRATION

Like all Australians, migrants' fiscal impacts vary at different life stages. Treasury modelling found that age and labour market outcomes are the main drivers of a permanent migrant's lifetime fiscal impact. Younger migrants have more taxpaying years ahead of them, as well as more opportunities to increase their skills and income. To achieve the same positive fiscal impact as a 30-year-old skilled migrant with an income of $100,000, a 45-year-old skilled migrant would need an annual income of $160,000.[19]

Skilled migrants are more likely to participate in the labour market, find employment, and receive a higher income than the Australian population, increasing their net fiscal contribution.

ECONOMIC CHALLENGES OF MIGRATION

Australia's current population growth rate is higher than historical averages and has been volatile by international standards. Migration can contribute to volatile population growth. High population growth can put temporary pressure on housing as supply takes time to adjust, which can push up rents and inflation in the short term. As housing supply and rents adjust, the effect on inflation in the long-term is neutral. Low migration can add to other economic challenges such as labour supply shortages in some geographical areas.

Migrants tend to disproportionately live in major cities, especially Sydney and Melbourne, which contributes to the uneven growth between cities and regional Australia. Labour shortages have been particularly acute in regional Australia while on average housing prices and rents have grown faster in cities compared to regional Australia over the last 5 years. The Migration Strategy outlines the Government's commitment for a migration system that works for all Australians. As part of this, the Government is undertaking a review of regional migration settings with a discussion paper released in June 2024.

Cutting migration levels can also create economic challenges. The Grattan Institute found that while cutting migration may make housing slightly cheaper in the short term, it would likely result in Australians having to pay higher taxes or receive fewer services.[20] Ensuring housing and infrastructure keep pace with elevated population growth during periods of volatility can pose significant planning challenges.

BALANCING THE BENEFITS AND CHALLENGES

Australia has one of the most successful skilled migration programs globally, and the Government is further improving it through the Migration Strategy.[21] Migration can bring needed skills and boost productivity while providing a fiscal dividend. These benefits complement non-economic benefits, such as family reunions, and contribute to Australia's social fabric. Australia's migration system works best when national needs and migrant opportunity are balanced.

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16 OECD, *The impact of migration on regional labour markets in Australia,* 2023.

17 OECD, *Regional productivity, local labour markets, and migration in Australia,* 2023.

18 OECD, *Migration and regional productivity: Evidence from individual wages in Australia,* 2023.

19 Varela P, Husek N, Williams T, Maher R and Kennedy D, *The lifetime fiscal impact of the Australian permanent migration program*, 2021.

20 Coates B and Wiltshire T, *Cutting permanent migration may make housing cheaper but it will definitely make us poorer*, 2024.

21 Harrap B, Hawthorne L, Holland M, McDonald JT, Scott A, *Australia's superior skilled migration outcomes compared with Canada's,* 2021.

BOX 5.   WHAT ARE THE DETERMINANTS OF THE ECONOMIC OUTCOMES OF AUSTRALIAN PERMANENT MIGRANTS?

In research commissioned by the Centre for Population, the Australian National University (ANU) found the primary factors that indicate whether a migrant will be successful, as measured by their income, include educational attainment, occupation, language and communication skills, as well as visa status. Beyond these, there are also unobservable characteristics such as motivation, attitudes and the ease of integration into the labour market and the broader community, which can also contribute to successful outcomes for migrants. This research helps us better understand the factors associated with the economic outcomes of Australian permanent migrants.

EDUCATION AND OCCUPATION

The research found education levels and the occupation of migrants are some of the most important factors influencing their incomes.

• Across each permanent visa stream, migrants with higher levels of education have higher levels of income. Compared to migrants with a high school qualification, those with an undergraduate degree earned 11 per cent more, those with a Master's degree earned 17 per cent more, and those with a PhD earned 41 per cent more.[22]

• Occupation is important in explaining the different outcomes of visa streams. Unsurprisingly, migrants who work in higher paid occupations are more economically successful.

LANGUAGE AND COMMUNICATION

Language and communication skills are a good predictor of success. Stronger English language skills correlate with higher incomes across all visa streams. Migrants that report low English language skills face a 28 per cent income penalty and are less likely to report an annual income over $20,000.[22] However, in an increasingly globalised world, the ability to proficiently speak a language other than English is a valuable skill, and one that also supports a more multicultural Australia.[23]

VISA CHARACTERISTICS AND STATUS

The ANU research also found the economic outcomes of migrants vary across visa programs. Skilled migrants have better economic outcomes than other migrants. Skilled migrants tend to have higher educational attainment and work in occupations that attract higher incomes, contributing to their success.

• Permanent migrants who previously held a temporary visa are more likely to have an income above $20,000 than offshore applicants.

• Migrants who have previously held a temporary skilled visa have higher incomes than migrants who have held other types of temporary visas.

• These characteristics are more important in determining short-term outcomes than long-term outcomes as there is some convergence over the long term.

The ANU found that Family and Humanitarian migrants have weaker economic outcomes than the Australian born population. While improving the economic outcomes of Family and Humanitarian migrants is important, non-economic benefits of protecting people from persecution and reuniting them with their families in Australia are the primary motivators of these programs.

In 2022–23, the total fertility rate fell to a record low of 1.55 babies per woman and, at 291,000 births, the number of births was the lowest since 2006–07, when the national population was about one-fifth smaller. The fertility rate has fallen from 1.69 in 2021–22. This builds on a multi-decade trend of declining fertility (Box 6).

Australia's fertility rate is expected to remain at record lows in 2023–24 (1.48) and 2024–25 (1.45). Based on the Centre's new leading indicator (Appendix – Box 11), births are expected to fall further, reaching 288,000 in 2024–25.

Recovery from the current low fertility rate is expected to take time. The total fertility rate is projected to gradually return to and stabilise at 1.62 by 2031–32. The fertility rate is expected to return to this long-run rate as the proportion of women without children has not increased significantly in recent years. As the fertility rate moves towards to its long-run level, and the number of potential parents grows with the population, annual births are forecast to increase to 352,000 by 2034–35.

Chart 14.   TOTAL FERTILITY RATE
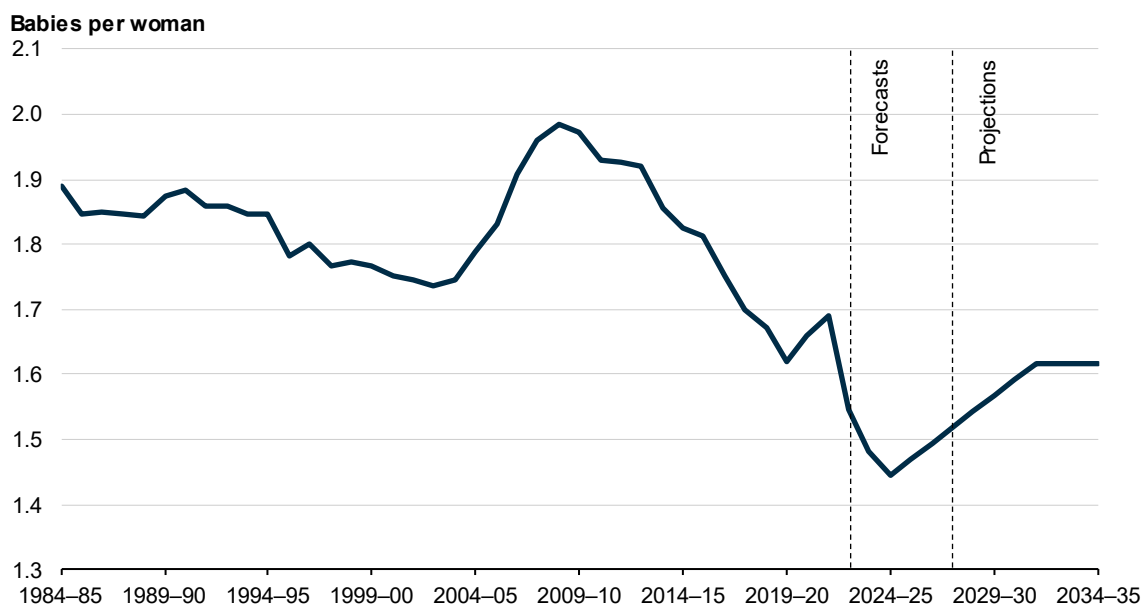
Source: ABS, *National, state and territory population, March 2024*; and Centre for Population.

1.3.1   RECUPERATION AND COHORT FERTILITY

The speed and trajectory of the recovery of the fertility rate is highly uncertain. The total fertility rate can be influenced by gradual, broad-based trends in fertility desires and intentions. However, it is also affected by the timing of childbearing, which is sensitive to economic and social conditions. For example, households may delay having children during periods of increased financial strain and this delay may have differential effects across socioeconomic groups.[24] In time, this means that those delayed births occur for women at older ages

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22 Varela P and Breunig R, *Determinants of the economic outcomes of Australian permanent Migrants*, 2024.

23 Coates B, Wiltshire T and Bradshaw N, *It all adds up: reforming points-tested visas*, 2024.

24 Tan K et al., *Effects of economic uncertainty and socioeconomic status on reproductive timing: A life history approach*, 2022.

than would otherwise have been the case, a phenomenon demography terms recuperation. The total fertility rate falls when births are delayed and rises when people have those children that they had put off.

The recent decline in fertility could be the result of a delay in births, a temporary reduction, or reflect a more structural reduction. The Centre projects the recent decline to be temporary, but with no additional recuperation of this recent decline. However, it is possible mothers will recuperate the births that were delayed, either fully or partly, in future years. This would mean a faster recovery in total fertility rate, with the rate temporarily peaking above the long-run level of 1.62 (at 1.70 and 1.66 in the full and partial recuperation scenarios respectively). By contrast, if the fall in the fertility rate is structural, we would expect the recent low fertility rate to be sustained. This would lead to a large reduction in births and accelerate population ageing, with the median age of the population reaching 40 years in 2038–39, which is 4 years earlier than forecast.

Chart 15. TOTAL FERTILITY RATE, COMPARISON WITH ALTERNATIVE FERTILITY SCENARIOS
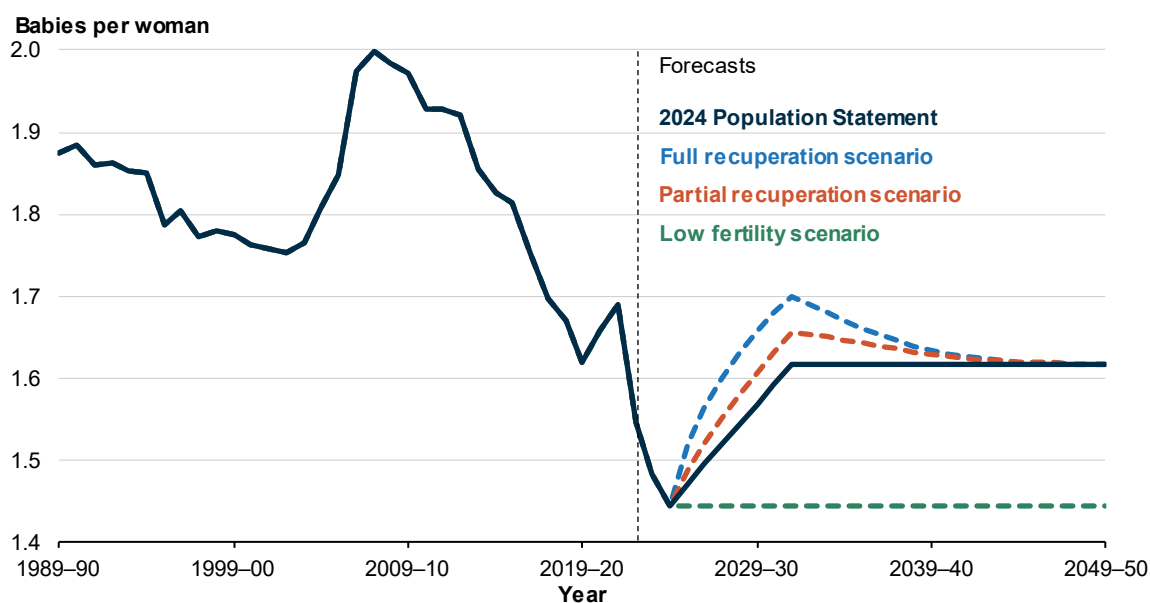
Source: Centre for Population.

An alternative measure of the fertility rate is the completed cohort fertility rate – the average number of children born to a cohort of women (that is, women of the same birth year) over their lifetime. This metric is more stable than the total fertility rate, as it accounts for changes in the timing of births over a woman's lifetime. For example, based on the Centre's forecasts, a woman born in 1991–92 is forecast to have on average 1.7 children over her life, despite the total fertility rate fluctuating during this period between a high of 2.00 to a low of 1.45.

Both recuperation scenarios project higher cohort fertility for women born between 1987–88 and 2009–10 than is expected under the Centre's current forecast, as recuperation means births end up happening later rather than not happening at all. This effect is smaller if recuperation occurs only partially, rather than fully, although younger cohorts would recuperate relatively more births than older cohorts, as they have more time to achieve their fertility intentions (Chart 16). Under the low fertility scenario, cohort fertility rates are permanently lower.

Chart 16. COMPLETED COHORT FERTILITY RATE, COMPARISON WITH ALTERNATIVE FERTILITY SCENARIOS

Babies per woman

Legend:
- 2024 Population Statement
- Full recuperation scenario
- Partial recuperation scenario
- Low fertility scenario

X-axis (Cohort): 1981–82, 1986–87, 1991–92, 1996–97, 2001–02, 2006–07, 2011–12, 2016–17

Y-axis: 1.4 to 2.0
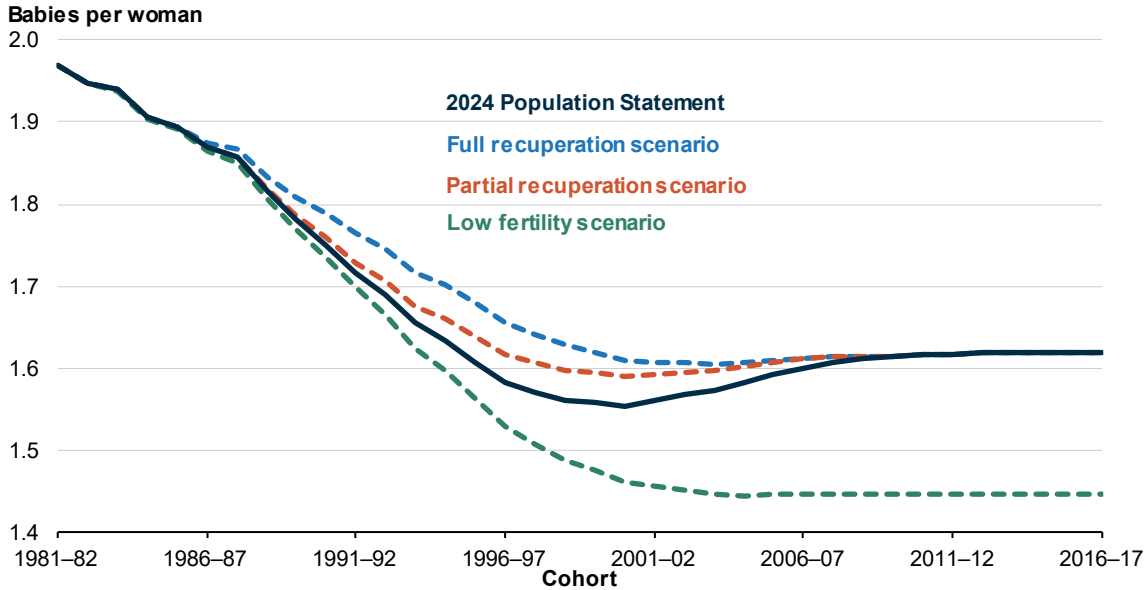
Source: Centre for Population.

1.3.2   LONGER TERM AND INTERNATIONAL TRENDS

Despite recent volatility, there is a long-running trend of Australian women having children later in life and having fewer of them. Australia's fertility rate has been falling since 1961 when it peaked at 3.55 babies per woman. The median age of mothers has risen from 25.4 years in 1971 to 31.9 years in 2023. Later childbearing has seen fewer families having 3 or more children. These trends have been driven by cultural norms, economic development and access to education and employment (Box 6).

Australia is not unique in seeing its fertility rate fall. Declining fertility rates are a global phenomenon and are expected to continue over the coming decades.[25] While following a similar pattern of decline, Australia's total fertility rate remains above most advanced economies and well above levels recorded in Canada, Italy and the Republic of Korea (Chart 17). This reflects many OECD countries, including Japan, Italy and the UK (England and Wales), having a larger proportion of women with no children (18 to 30 per cent), compared to Australia (16.3 per cent).[26]

Most countries reached historically low fertility rates in 2023. The UK has now reached a record low of 1.44 babies per woman. Canada, with consistently lower fertility than Australia, also recorded a historic low of 1.26 in 2023. Meanwhile, the Republic of Korea, which has the lowest fertility rate in the world, set a record low of 0.72 in 2023. In China, the fertility rate has declined rapidly since 2017, even with the end of the one-child policy in 2015.

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25 United Nations, *World Population Prospects*, 2024.

26 ABS, *Census of Population and Housing, 2021*.

Chart 17. TOTAL FERTILITY RATES, SELECTED COUNTRIES

Babies per woman
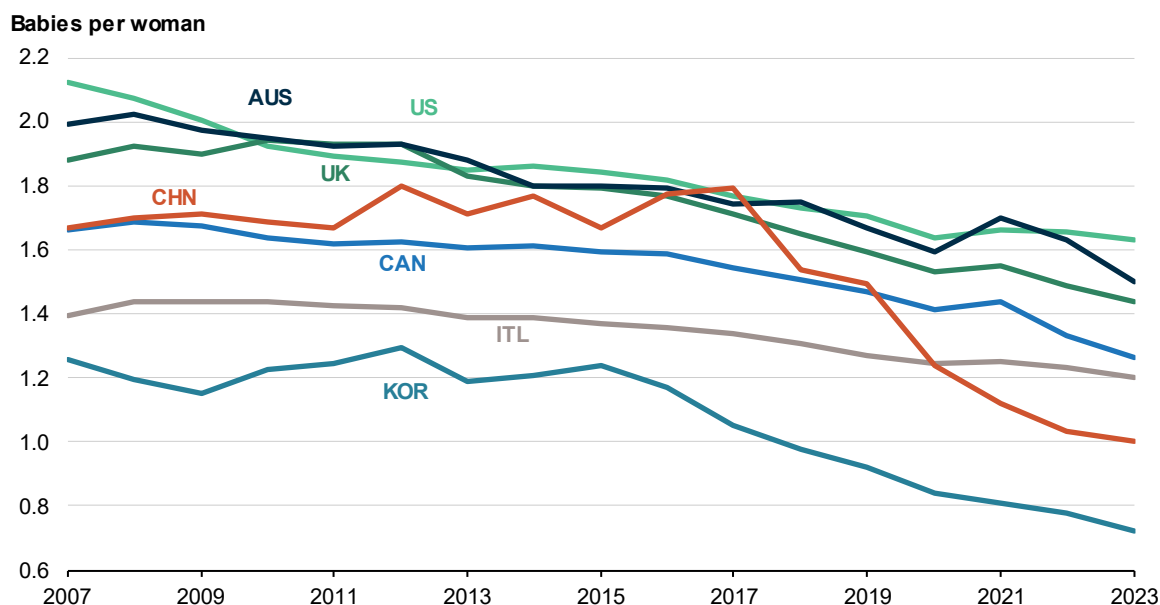
Note: Total fertility rates in this chart are presented on a calendar year basis and differ from the Centre's projections which are on a financial year basis.

Source: Human Fertility Database, *Short Term Fertility Fluctuations*, 2023; ABS, *Births, Australia 2023*; ONS, *Births in England and Wales*: 2023; Statistics Canada, *Fertility Indicators, Canada, 2023*; United Nations, *World Population Prospects,* 2024.

1.3.3 REPLACEMENT FERTILITY

Since the 1970s, Australia's total fertility rate has been below the replacement rate, which is the level required for a generation to replace itself.

In the absence of migration, the replacement rate is a straightforward concept: 2 babies per woman are needed to replace each parent, plus an additional factor as not all babies survive to reproductive age. In advanced economies, where mortality is low, this typically results in an average replacement rate of around 2.1. Under its current mortality projections, the Centre estimates Australia's replacement rate is 2.06. Assuming no migration, this level leads to the population eventually stabilising, with roughly equal numbers of births and deaths occurring each year. However, the replacement rate varies more widely across lower-income economies, with around 80 countries having a replacement rate higher than 2.2 and some exceeding 3.[27]

Despite Australia's fertility rate being below replacement, the population is not at risk of decline for 2 reasons. First, the population is still sufficiently young, such that there are more births than deaths under current fertility rates. This is because natural increase is determined not only by the total fertility rate but also by the age structure of the population, particularly the proportion of women of reproductive age. This concept is known as population momentum.[28] Even without migration, population momentum will mean Australia's population will continue to experience natural increase and growth until 2041–42.

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27 Espenshade TJ, Guzman JC and Westoff CF, *The surprising variation in global fertility*, 2003.

28 Morse A, *Population Momentum and Fertility*, 2024.

Second, NOM continues to add to the population, and keeps the population young. The total fertility rate required for the population to replace itself can be lower than 2.1 in the presence of positive NOM, with research suggesting a with-migration replacement total fertility rate for Australia of 1.0, based on trends between 2011 and 2015.[29] Under current mortality and migration assumptions, the Centre estimates that a rate of around 1.2 leads to a stable population earlier than any other rate, and is the lowest fertility rate that does not result in a period of population decline.[30]

1.3.4 FERTILITY BY COUNTRY OF BIRTH

Recent calendar year data shows the total fertility rate fell to a record low of 1.50 in 2023, a sharp decline from 1.63 in 2022. Births declined by 4.6 per cent, which was the largest annual decrease since 1975. This data also allows us to understand how fertility rates vary for those born overseas.

Over 2021 to 2023, overseas-born women in Australia had lower fertility rates than Australian-born women (1.34 babies per woman compared to 1.69).[31] [32] However, this has changed from two decades earlier. Over 2001 to 2003, the total fertility rate for overseas-born women was slightly higher than for Australian-born women (1.77 babies per woman compared to 1.73).[33]

The shift to lower fertility rates among the overseas-born reflects the growing incidence of residents on temporary visas (such as international students), who represented around 13 per cent of women aged 20 to 29 at the 2021 Census. Women are unlikely to give birth while on a temporary visa – according to the 2021 Census, the number of children born to temporary visa holders of all ages is lower than both Australian-born and other overseas-born women (Chart 18). Over time, overseas-born women's fertility rates converge to those of Australian-born women. However, even with time, their fertility rate patterns do not fully converge to those of Australian-born women.[34]

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29 Parr N, *A New Measure of Fertility Replacement Level in the Presence of Positive Net Immigration*, 2020.

30 Where NOM is projected as a rate, only one fertility rate leads to a stable population. However, the Centre projects the level of NOM rather than a rate, leading population growth to eventually stabilise regardless of the fertility rate. However, when and at what level it stabilises depends on the fertility rate.

31 ABS, *Births, Australia, 2023*.

32 The total fertility rate for overseas-born women is based on births registered in Australia over a 3-year period, excluding children born before they move to Australia.

33 ABS, *Births, Australia, 2003*.

34 Baffour B et al., *Recent Trends in immigrant fertility in Australia*, 2020.

Chart 18. NUMBER OF CHILDREN EVER BORN BY COUNTRY OF BIRTH AND VISA TYPE OF MOTHERS, 2021

Children ever born
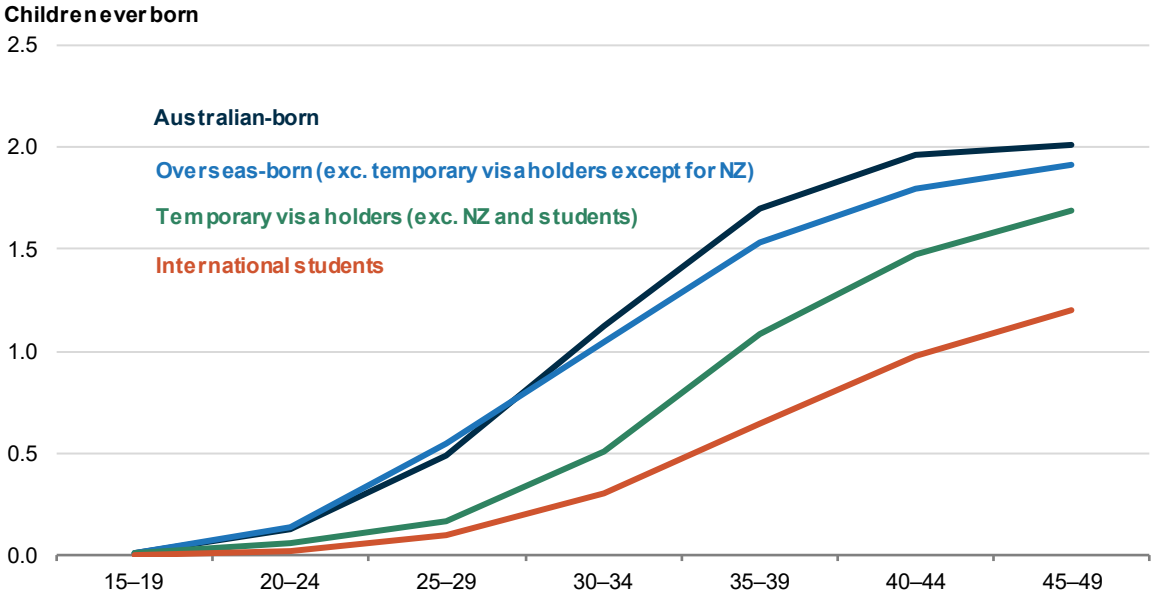
Note: The overseas-born line excludes temporary visa holders, except for New Zealand citizens because they can remain indefinitely on a temporary visa. The temporary visa holders line excludes both New Zealand citizens and international students.

Source: ABS, *Census 2021*.

BOX 6. MACROECONOMIC FACTORS DRIVING FERTILITY DECLINE IN AUSTRALIA

The factors contributing to decline in fertility rates are complex, with macroeconomic, social and individual dimensions. Broad macroeconomic factors reducing Australia's fertility rate include higher educational attainment by women, female labour force participation, job security, as well as housing and child-rearing costs. These factors influence individual choices regarding family formation.

Survey data indicates that Australia's fertility intentions are not being met. The Household, Income and Labour Dynamics in Australia (HILDA) survey found average adult fertility intentions to be 1.9 children in 2020, when the total fertility rate was 1.6.[35][36] Fertility decisions are based on a complex mix of individual, social and economic factors, with financial and career barriers a major part of the current low-fertility story.[37] Research indicates that policies that encourage a more equal division of household labour, alleviate the financial cost of having children, and policies that promote housing security could be effective in raising fertility to support the choices of individuals.[38]

FEMALE EDUCATION AND LABOUR FORCE PARTICIPATION

Over the past 60 years, Australian women have attained higher levels of educational qualifications and increased their participation in the labour force. These 2 trends have had a major effect on households' fertility choices. Research from the ANU, commissioned by the Centre for Population, found many women want financial and professional stability before taking time out of the workforce to have a child. This results in delayed childbearing and, in some cases, fewer children.

Despite changes in women's workforce participation, women still perform more unpaid work in the home than men, especially if they have children. This gender gap peaks at ages 31 to 35. In 2022, women in this age group spent 18 hours per week more than men on unpaid household labour and care.[39] Further to this, the ABS has recently released early experimental estimates of the value of unpaid child care in Australia. These estimates found the monetary value of unpaid care work that occurred in Australia equated to $55.6 billion in the June quarter 2021, and 69 per cent of this was performed by women.[40] This results in women, especially mothers, undertaking a 'second shift' in the home often in addition to work outside the home, which can discourage them from either having children or having more children.[41]

JOB SECURITY

Labour market conditions have also changed in recent decades, potentially influencing fertility decisions. The labour market has experienced a decline in stable, low-skilled job opportunities, creating job insecurity for younger adults.[42][43] This encourages young people to invest more time in their education and establishing themselves in their chosen career. Research has found that compared to permanent employment, fixed-term employment among men aged 18 to 45 reduces the probability of having a first child by 18.4 percentage points and casual employment among men reduces the probability of first birth by 9.7 percentage points.[44]

COSTS OF HAVING CHILDREN

The cost of raising children, including housing, child care and education, influences childbearing decisions, with 39 per cent of childless people citing the cost of raising children to be a very important factor in their fertility decisions.[45]

1.4 DEATHS

In 2023–24, around 184,000 deaths occurred in Australia (based on ABS provisional data).[46] This is 2.2 per cent (or 4,200 deaths) below the 2022–23 peak that occurred as COVID-19 spread widely within the community. However, it is still 12.9 per cent above the pre-pandemic level observed in 2018–19 and above 'expected' levels, a concept known as excess mortality (Box 7). There were 4,000 deaths due to COVID-19 over 2023–24, 47.5 per cent (or 3,600) lower than the 2022–23 peak. COVID-19 accounted for 2.2 per cent of deaths over 2023–24, compared with 4.1 per cent over 2022–23.[47]

COVID-19 is expected to continue to lead to higher mortality over 2024–25 to 2027–28, with excess mortality (relative to pre-pandemic trends) subsiding over the period. As excess mortality subsides, deaths are forecast to fall to 186,000 in 2024–25, then slowly rise to 191,000 by 2027–28. From 2028–29 onwards, mortality rates for all age groups are expected to return to pre-pandemic trends and continue to decline at the rate observed over the past 3 decades. Deaths are forecast to increase to 222,000 by 2034–35, reflecting the growing and ageing population. The Centre's forecast is based on the most recent data and trends, but the medium and long-term effects of COVID-19 remain uncertain.

35 Department of Social Services, *Household, Income and Labour Dynamics in Australia Survey (HILDA)*, 2021.

36 Australian Bureau of Statistics, *Births, Australia,* 2021.

37 For a more detailed discussion see the *Fertility decline in Australia: is it here to stay?* publication on the Centre's website.

38 Gray et al., *Impacts of Policies on Fertility Rates*, 2022.

39 Department of Social Services, *Household, Income and Labour Dynamics in Australia Survey (HILDA),* 2023.

40 Australian Bureau of Statistics, *Measuring the labour contribution of unpaid care in the Labour Account*, 2024.

41 Gray et al., *Impacts of Policies on Fertility Rates,* 2022.

42 Commonwealth of Australia, *Working Future: The Australian Government's White Paper on Jobs and Opportunities*, 2023.

43 Wooden, Trinh & Mooi-Reci, *The Differential Impacts of Contingent Employment on Fertility: Evidence from Australia*, 2023.

44 Wooden, Trinh & Mooi-Reci, *The Differential Impacts of Contingent Employment on Fertility: Evidence from Australia,* 2023.

45 Gray et al., *Impacts of Policies on Fertility Rates,* 2022.

46 This figure will increase slightly due to small numbers of late reported deaths.

47 This does not include deaths where COVID-19 was a contributing factor (1,200 deaths). In 2023–24, the decrease in deaths with COVID-19 as a contributing factor was similar to the decrease in deaths due to COVID-19.
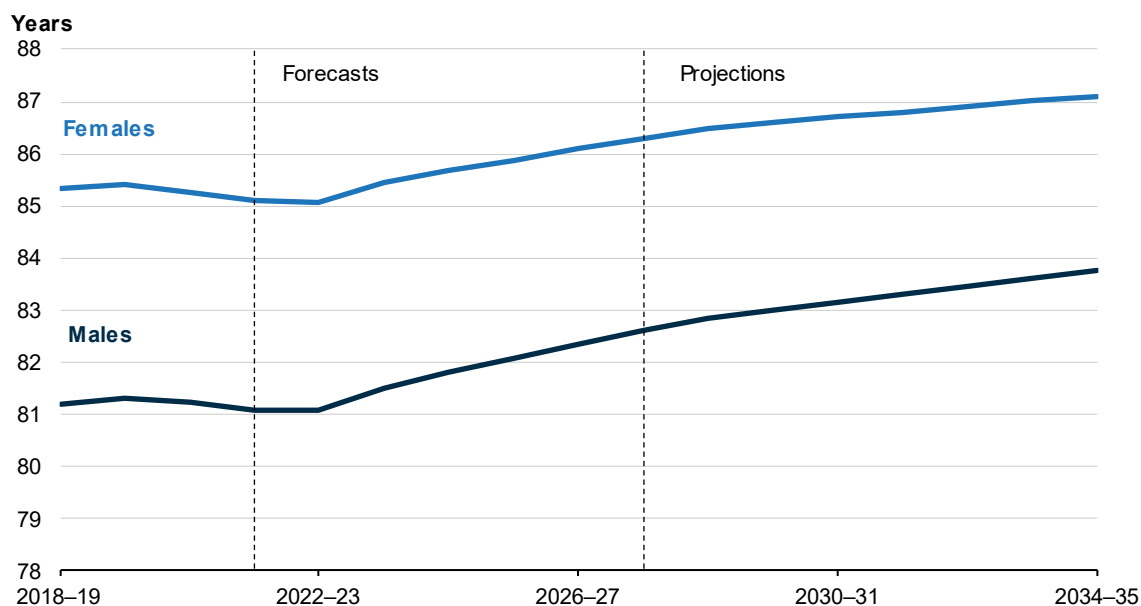
1.4.1 LIFE EXPECTANCY

Australia has the fourth highest life expectancy among OECD countries, behind Japan, Switzerland, and the Republic of Korea. However, continued excess mortality has temporarily reduced life expectancy.[48] Despite the recent fall in life expectancy, Australia's ranking has risen relative to 2021 and pre-pandemic.[49] This reflects Australia's comparatively better pandemic experience: delaying widespread COVID-19 until the vast majority of the population was vaccinated resulted in a later peak in mortality, and lower overall mortality, compared to other countries.

In 2021–23, Australia recorded a decline in life expectancy at birth for the second consecutive year, for the first time since the 1960s. Life expectancy decreased by 0.2 years for men and 0.3 years for women from the peak in 2019–21, to be 81.1 years for men and 85.1 for women. Life expectancy at birth is projected to have reached its lowest point in 2022–23, before increasing and gradually returning to pre-pandemic trends by 2028–29.

Analysis by ANU and University of Melbourne demographers shows how life expectancy changed in each year of the pandemic.[50] In 2020, Australia's COVID-19 lockdowns and travel restrictions, the seventh most stringent restrictions among 34 high-income countries, caused the largest single year increase in life expectancy since the 1990s. In 2021, life expectancy declined from its 2020 peak, due to mortality displacement (delayed deaths). In other words, the lower mortality rates among older and more frail populations in 2020 were to some extent offset by higher mortality in 2021. In 2022, a sharp increase in COVID-19-related deaths led to the largest fall in life expectancy in decades.

Chart 19. HISTORICAL AND PROJECTED LIFE EXPECTANCIES

Source: ABS, *Life expectancy, 2021–2023*; Australian Government Actuary; and Centre for Population.

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48 ABS, *Life expectancy, 2021–2023*.

49 OECD Data Explorer, *Life expectancy, 2024*.

50 Adair, Houle & Canudas-Romo, *Submission to the Inquiry into Excess Mortality, Senate Community Affairs References Committee*, May 2024.

1.4.2 CAUSES OF DEATH

In the 2023 calendar year, the 5 leading causes of death accounted for one-third of all registered deaths. These in order were: heart disease due to a lack of blood and oxygen (ischaemic heart disease or IHD), dementia (including Alzheimer's disease), conditions that affect blood flow to the brain (cerebrovascular diseases), lung cancer, and chronic lower respiratory diseases. Over the past 50 years, IHD mortality has fallen by nearly 90 per cent with improved health care and medical intervention. Meanwhile, dementia mortality has increased by over 800 per cent, due in part to population ageing. If these trends continue, dementia will become the leading cause of death in coming years.

COVID-19 mortality was much lower in 2023 than 2022, falling from the third to the ninth leading cause of death over this period. This coincides with the announcement by the World Health Organization (WHO) of an end to the emergency phase of the COVID-19 pandemic in 2023.

There were 5,300 deaths of First Nations people in 2023. A larger share of deaths of First Nations people were among younger people compared with deaths of non-Indigenous Australians, reflecting higher mortality rates and a younger age profile.

The most common causes of death differed for First Nations people, compared to the broader population. In 2023, the 5 leading causes of death for First Nations people were (in order) IHD, chronic lower respiratory diseases, diabetes, lung cancer, and intentional self-harm (suicide).[51] These causes of death also had the largest differences in age-standardised death rates between First Nations and non-Indigenous Australians.

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51 Based on reported data for the 5 jurisdictions with higher quality First Nations identification data: New South Wales, Queensland, Western Australia, South Australia and the Northern Territory.

## BOX 7.   EXCESS MORTALITY DURING AND AFTER THE PANDEMIC[52]

Excess mortality is the difference between actual and expected deaths in a given period. It measures whether deaths are above their normal or trend level. Expected deaths are the number of deaths that would be anticipated under 'normal' conditions (for example, in the absence of the COVID-19 pandemic). The ABS's methodology for estimating excess deaths accounts for changes in the size and age profile of population, as well as seasonal factors.

The WHO declared COVID-19 a worldwide pandemic on 11 March 2020. During the first 2 years of the pandemic, deaths in Australia were 3.1 per cent (5,200) lower than expected in 2020 and were 1.6 per cent (2,800) higher than expected in 2021. This period was marked by lockdowns and border restrictions, which limited the spread of COVID-19 and other diseases. Excess mortality peaked in 2022 at 11.7 per cent, or 20,000 deaths above expected, which coincided with the peak in COVID-19 deaths, as the virus spread more widely within the community.

In 2023, the WHO stopped considering COVID-19 to be a public health emergency of international concern and Australia shifted to managing COVID-19 like other common communicable diseases. Excess mortality persisted in 2023 (with deaths 5.1 per cent above expected) although it is less than half the excess mortality recorded in 2022 (11.7 per cent) with fewer COVID-19 deaths than in 2022.

COVID-19 has been the main contributor to excess mortality. From 2022, when COVID-19 became endemic, it has accounted for 67 per cent of excess deaths. Deaths without COVID-19 often increased alongside COVID-19 deaths. Potential reasons for this include: delays in emergency care during COVID-19 waves and influenza outbreaks, long-term health impacts of COVID-19 infection or where COVID-19 may have exacerbated another health condition, reduced timeliness of routine healthcare (for example health assessments, diagnostic testing and elective surgeries) and mortality displacement.[53]

Chart 20.   WEEKLY DEATHS, WITH AND WITHOUT COVID-19
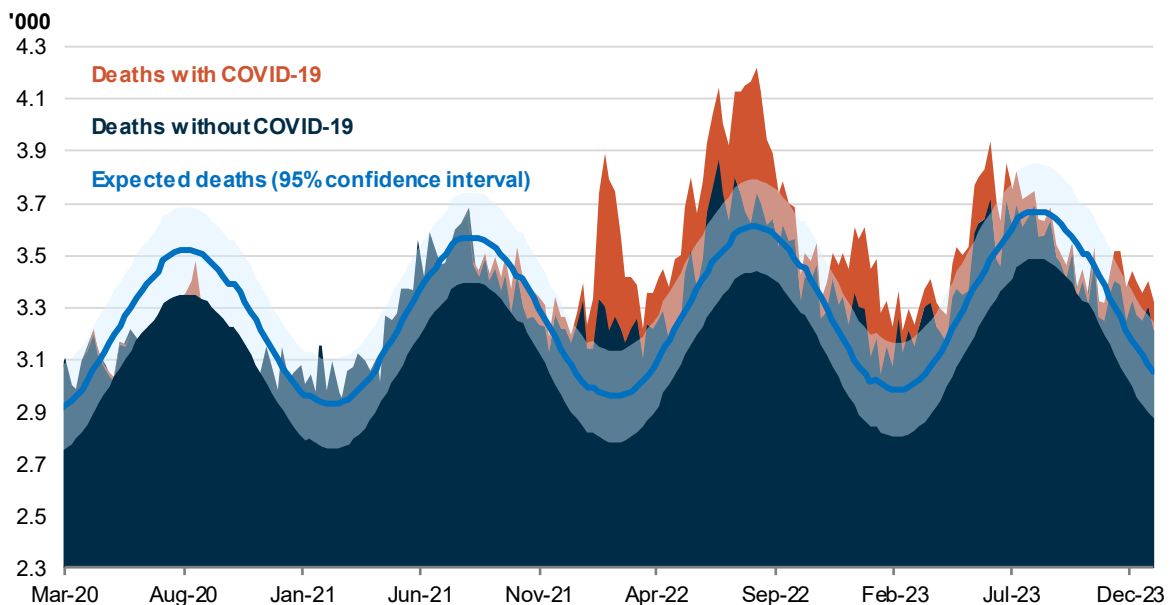
Note: COVID-19 deaths are where COVID-19 is identified as either the cause of death or a contributing factor.
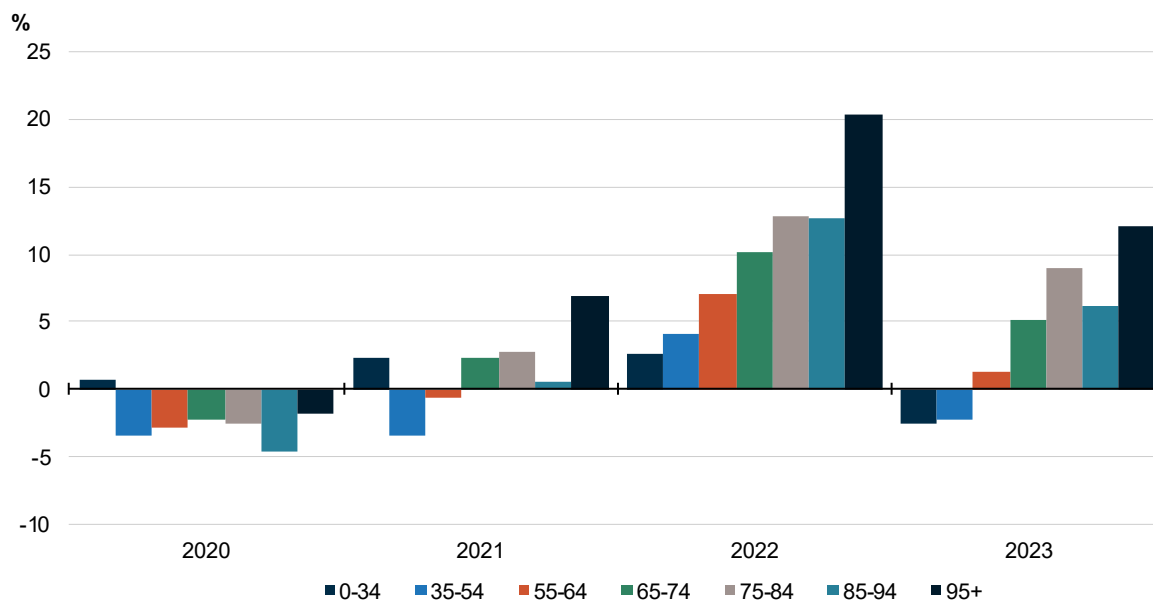Source: ABS, *Measuring Australia's excess mortality during the COVID-19 pandemic until December 2023*.

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Excess mortality since the onset of the pandemic increases with age. Since the start of 2022, nearly all excess deaths occurred among those aged 55 and over (99 per cent), with almost half (47 per cent) among those aged 85 and over. In 2022, all age groups recorded excess mortality, although this was higher for those aged over 55, while in 2023 only those aged 55 years and above experienced excess mortality. In 2021, prior to COVID-19 becoming widespread, excess deaths were lower, but were also concentrated in older age groups.

Chart 21. **EXCESS MORTALITY BY AGE GROUP (PERCENTAGE DEATHS ABOVE/BELOW EXPECTED)**

Source: ABS, *Measuring Australia's excess mortality during the COVID-19 pandemic until December 2023.*

Australia has experienced lower excess mortality than many advanced economies. *The Economist* estimated that since the start of the COVID-19 pandemic (to 17 June 2024), Australia experienced 163 excess deaths per 100,000 people. This was lower than the UK (409 per 100,000 people), the United States (434) and Canada (225). New Zealand experienced fewer excess deaths than Australia, with 19 excess deaths per 100,000 people. Other estimates likewise show Australia had lower excess mortality than comparable countries.

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52 More information on excess mortality can be found in the Centre's submission to the Senate inquiry into excess mortality.

53 The Department of Health and Aged Care, *Submission from the Department of Health and Aged Care to the Senate Community Affairs References Committee Inquiry into Excess Mortality*, 2024.

Chart 22. CUMULATIVE EXCESS DEATHS PER 100,000 PERSONS, JANUARY 2020 TO JUNE 2024

Excess deaths per 100,000

A bar chart showing cumulative excess deaths per 100,000 persons for five countries: Australia (~165), New Zealand (~20), Canada (~225), United Kingdom (~410), United States (~435). The y-axis ranges from 0 to 500 in increments of 50.
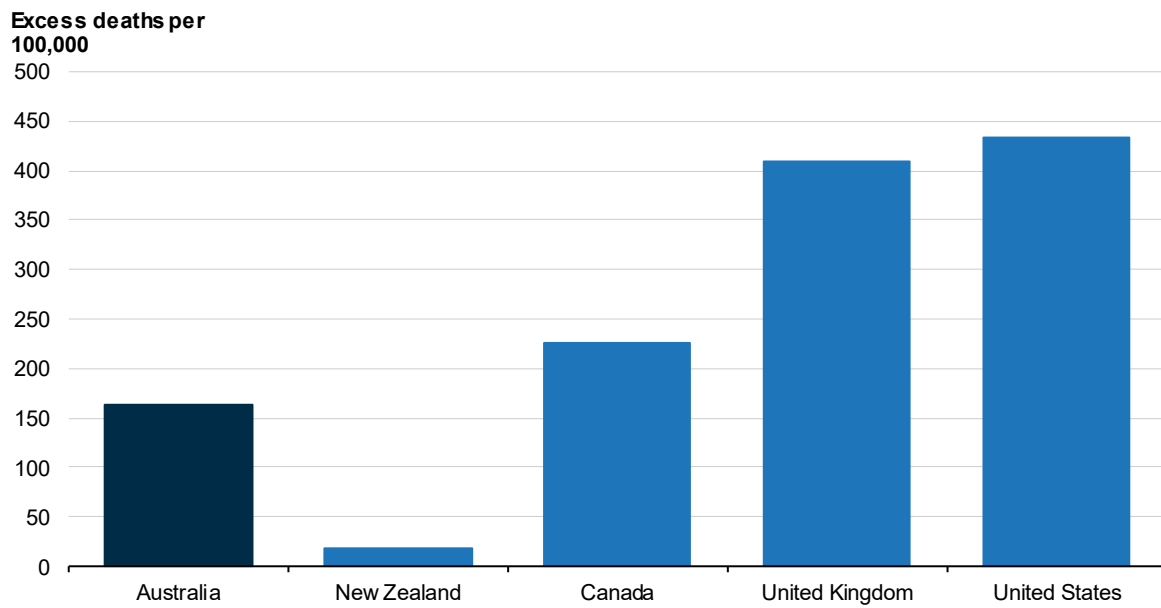
Source: The Economist – processed by Our World in Data, *Estimated cumulative excess deaths per 100,000 people during COVID*, 2024.

2. SUB-NATIONAL POPULATIONS

2.1 SUMMARY

2.1.1 STATES AND TERRITORIES

Most states and territories have been experiencing high population growth, driven by NOM. Population growth is expected to decline in 2023–24 for all states and territories as migration slows (Chart 23). Net internal migration is above long-term trend levels in Queensland and Western Australia, and below trend levels in New South Wales, Tasmania, the Northern Territory and the Australian Capital Territory.

In 2024–25, Western Australia is forecast to have the highest population growth rate (2.2 per cent), with particularly elevated NOM. Tasmania is forecast to have the lowest population growth rate, at 0.2 per cent, mostly due to its low share of NOM and a net outflow of people to other states.

Population growth in all states and territories is expected to settle from 2025–26, with slight declines in growth rates as the population ages. Western Australia and Victora are projected to be the fastest growing states over the projection period, driven by their high shares of NOM. New South Wales is projected to grow more slowly than the other mainland eastern states but will remain Australia's largest state with a population of 9.6 million in 2034–35 (30.8 per cent of the national population). Tasmania and South Australia are expected to be the lowest growth states from 2026–27. Both states have a relatively small share of NOM, little or negative net interstate migration, and low natural increase arising from their older population age structures.

Chart 23. POPULATION GROWTH, STATES AND TERRITORIES
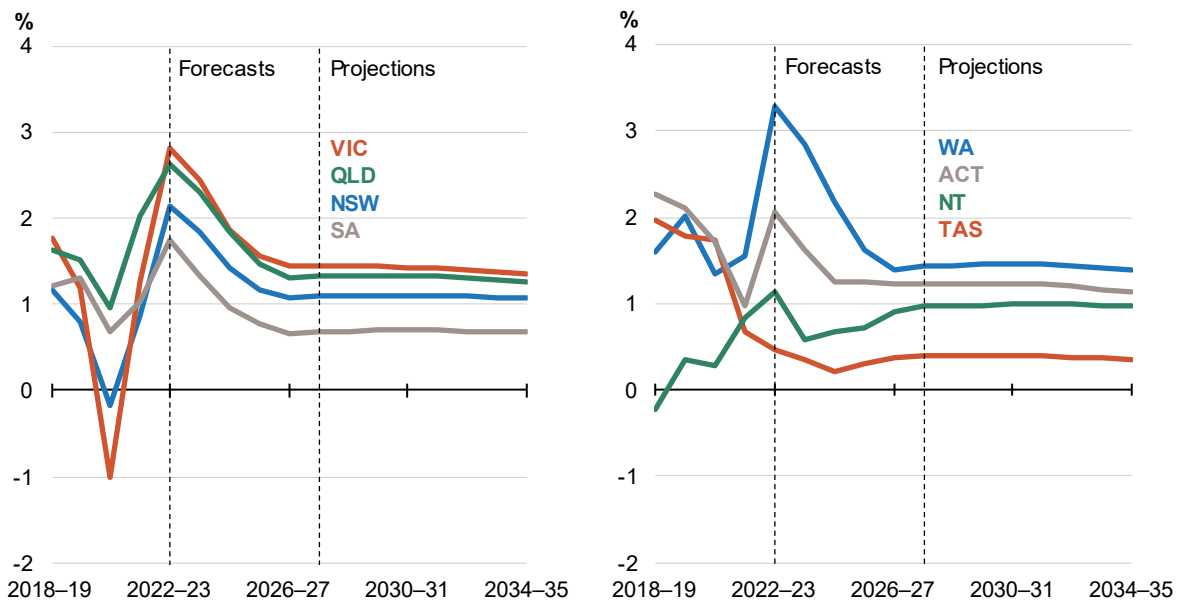
Source: ABS, *National, state and territory population, March 2024*; and Centre for Population.

## 2.1.2 CHANGES SINCE THE 2023 POPULATION STATEMENT

The Centre has changed its projections significantly for some states and territories since the 2023 Population Statement (Chart 24). In the short term, the forecasts for 2023–24 have been revised up by 1.3 per cent for Western Australia and 0.5 per cent for Queensland, driven by higher-than-expected NOM.

By 2033–34, projected state shares of NOM have changed substantially, as the Centre has adopted a new methodology to better reflect state level NOM data (Appendix – Section 3.1.1). This has led to large downgrades to the projected populations for Tasmania (down 5.6 per cent) and the Australian Capital Territory (down 4.4 per cent) and upgrades to the projected populations for Western Australia (up 2.9 per cent) and Queensland (up 1.2 per cent). Tasmania's population is now expected to increase by 3.7 per cent over the decade to 2033–34, less than half the 9.4 per cent growth expected in the 2023 Statement. Due to these changes in the NOM projections, Melbourne's population is no longer expected to overtake Sydney's by 2034–35; in the 2023 Statement, the Centre had expected this to occur in 2031–32.

Net interstate migration is projected to be lower than previously expected for the Northern Territory. Downgrades to net interstate migration over 2023–24 to 2025–26 are the main reason for the Northern Territory's population being revised down by 2.4 per cent by 2033–34.

Due to lower fertility rates in the near term, total births have been revised down for all states and territories. However, the states with upward revisions to population will have more births from around the 2030s compared to the 2023 Statement. Tasmania is now projected to have natural decrease (more deaths than births) from 2029–30, compared to 2033–34 in the 2023 Statement.

Chart 24. CHANGE IN STATE AND TERRITORY POPULATION SINCE THE 2023 POPULATION STATEMENT
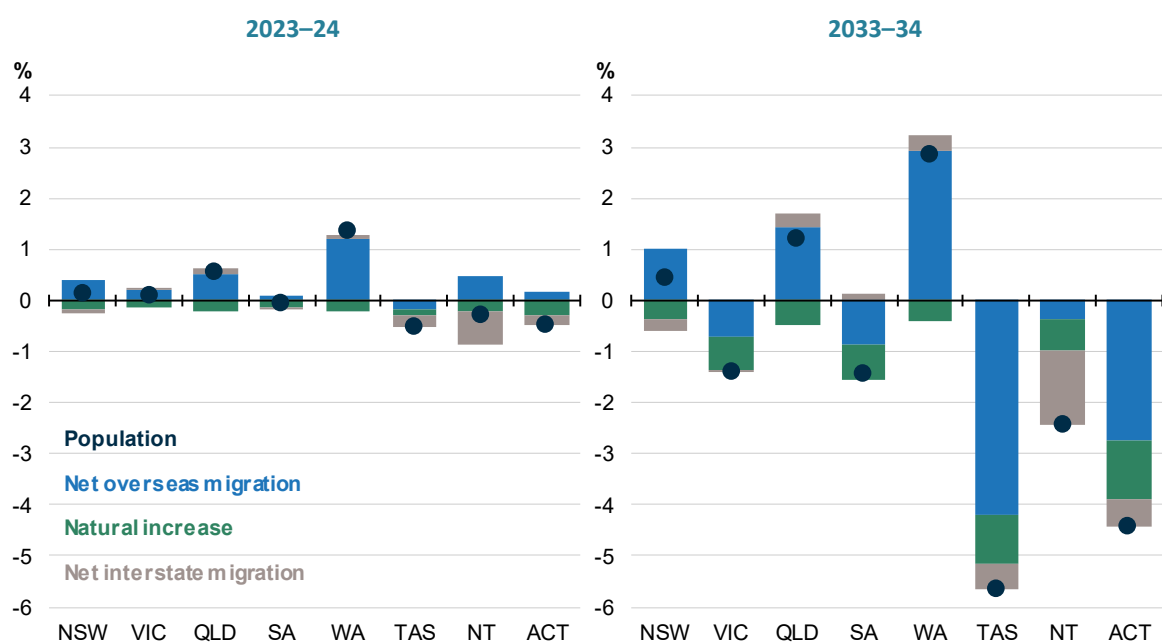
Source: Centre for Population.

2.1.3 CAPITAL CITIES AND REST-OF-STATE AREAS

Consistent with historical trends, the combined population of capital cities is projected to continue to grow nearly twice as fast as rest-of-state areas over the projection period (Chart 25 and Chart 26). The combined capital city population is projected to grow from 18.0 million in 2022–23 to 21.7 million in 2034–35, which represents an increase of 20 per cent. Over the same period, the population of the combined rest-of-state areas is projected to grow from 8.7 million to 9.6 million, an increase of 11 per cent.

Chart 25. POPULATION GROWTH AND COMPONENTS, CAPITAL CITIES
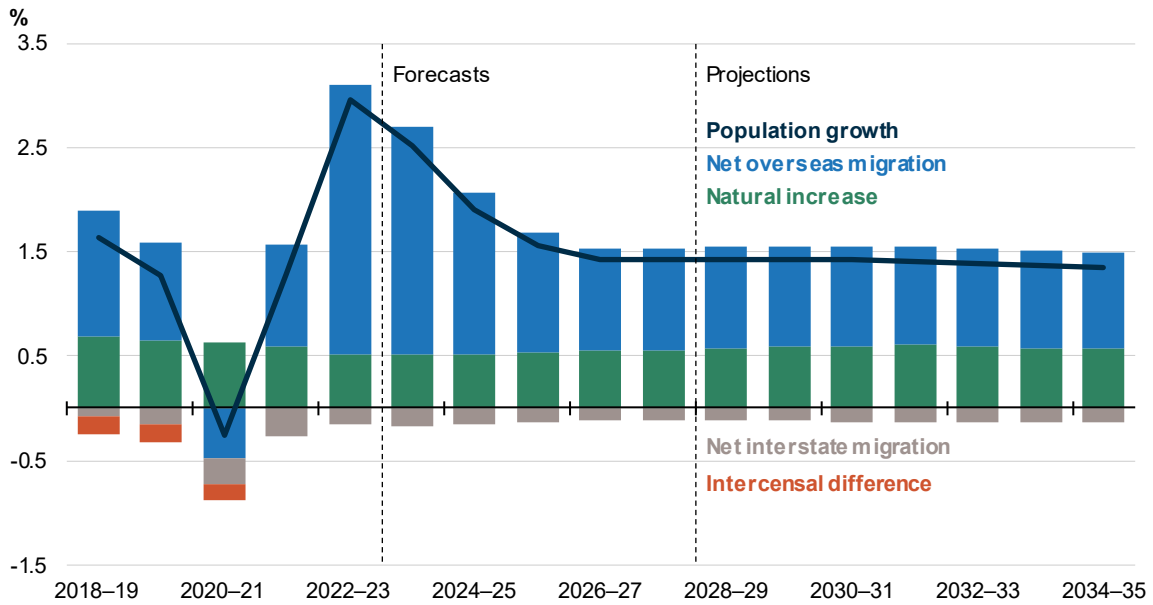
Source: ABS, *Regional population, 2020–21, 2022–23*; and Centre for Population.

Chart 26. POPULATION GROWTH AND COMPONENTS, REST-OF-STATE AREAS
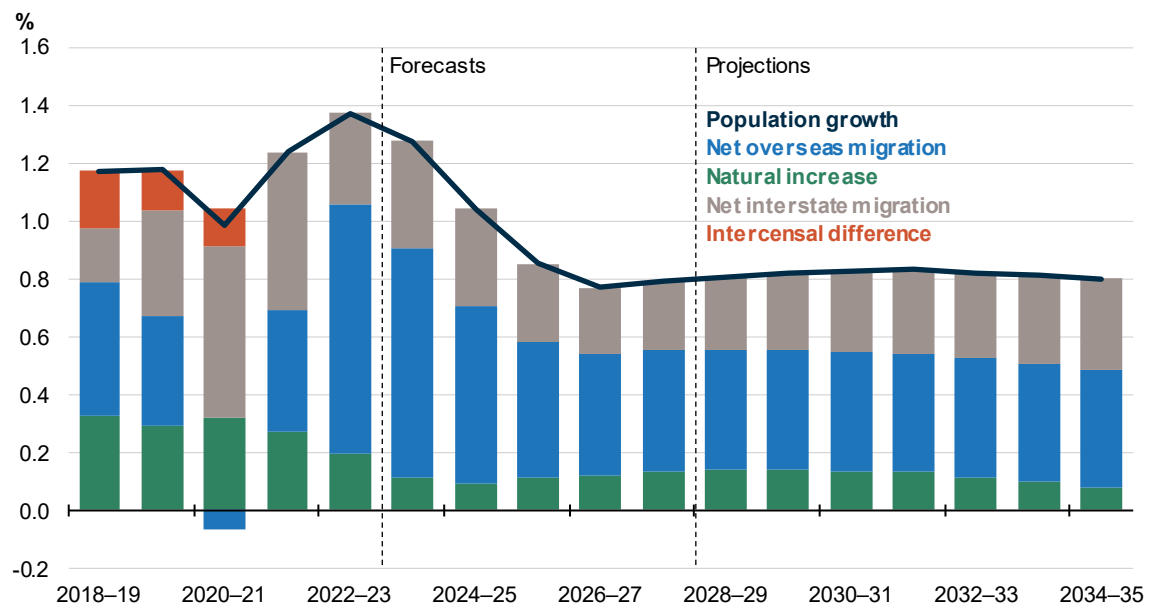
Source: ABS, *Regional population, 2020–21, 2022–23*; and Centre for Population.

For each state, the growth of its capital city is the main driver of its overall population growth. Among all states, Western Australia has the most concentrated population in its capital city (80 per cent of the population resides in Perth) while Tasmania is the least concentrated (44 per cent of the population resides in Hobart). This pattern is expected to remain unchanged through to 2034–35.

Capital city population growth is higher than rest-of-state areas because overseas migrants tend to settle in cities and the younger age structure of cities results in more natural increase. Partially offsetting this is the net flow of internal migration from capital cities to rest-of-state areas.

The areas outside of capital cities are sometimes referred to as regional areas, but they include large cities such as the Gold Coast, Newcastle, Wollongong and Geelong. Despite being lower than in capital cities, NOM is projected to be the largest contributor to population growth outside of capital cities over the projection period. Net internal migration from capital cities is also a significant contributor to population growth, adding 0.4 percentage points to rest-of-state growth in 2023–24, although this is projected to decline to 0.2 percentage points in 2026–27. Natural increase is projected to decline in all states as the population ages. There is already natural decrease in rest-of-South Australia and rest-of-Tasmania. By 2032–33, natural decrease in the population is also expected in rest-of-Victoria.

2.1.4   AGEING IN SUB-NATIONAL POPULATIONS

The median age has increased in each state since the 1960s. At the same time, the gap between the youngest and oldest median ages by state has been widening (Chart 27). In 2022–23, the gap between the youngest median age (Northern Territory, 33.7 years old) and oldest median age (Tasmania, 41.9 years old) states was 8.2 years. By contrast, in 1973–74 the gap between the youngest median age state (NT, 23.9 years old) and oldest median age state (NSW, 28.7 years old) was only 4.8 years. The gap between the youngest and oldest median age is projected to grow to 10.3 years by 2034–35.

Chart 27.   MEDIAN AGE ACROSS STATES
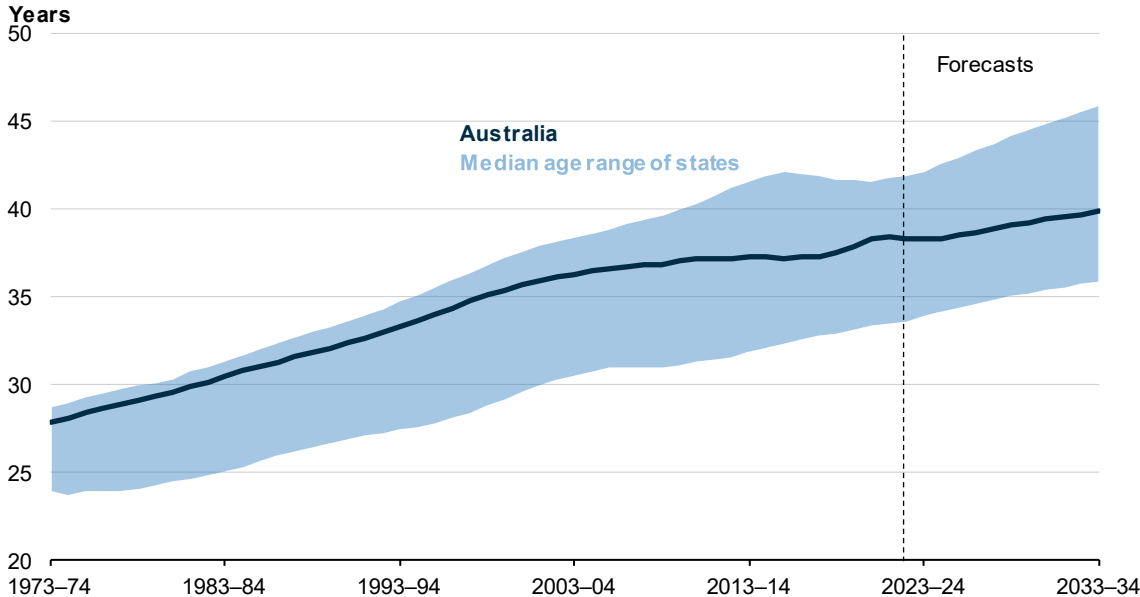
Source: ABS, *National, state and territory population, March 2024*; and Centre for Population.

At the sub-state level, populations outside of capital cities are older than the populations in capital cities, except for in the Northern Territory. In aggregate, around 21 per cent of the population outside of capital cities was aged 65 and over in 2022–23, compared to 15 per cent of those in capital cities (Chart 28). By 2034–35, around 25 per cent of the population living outside of capital cities is projected to be aged 65 and over, compared to 17 per cent in capital cities.

Chart 28. AGE DISTRIBUTION IN CAPITAL CITIES AND REST-OF-STATE AREAS
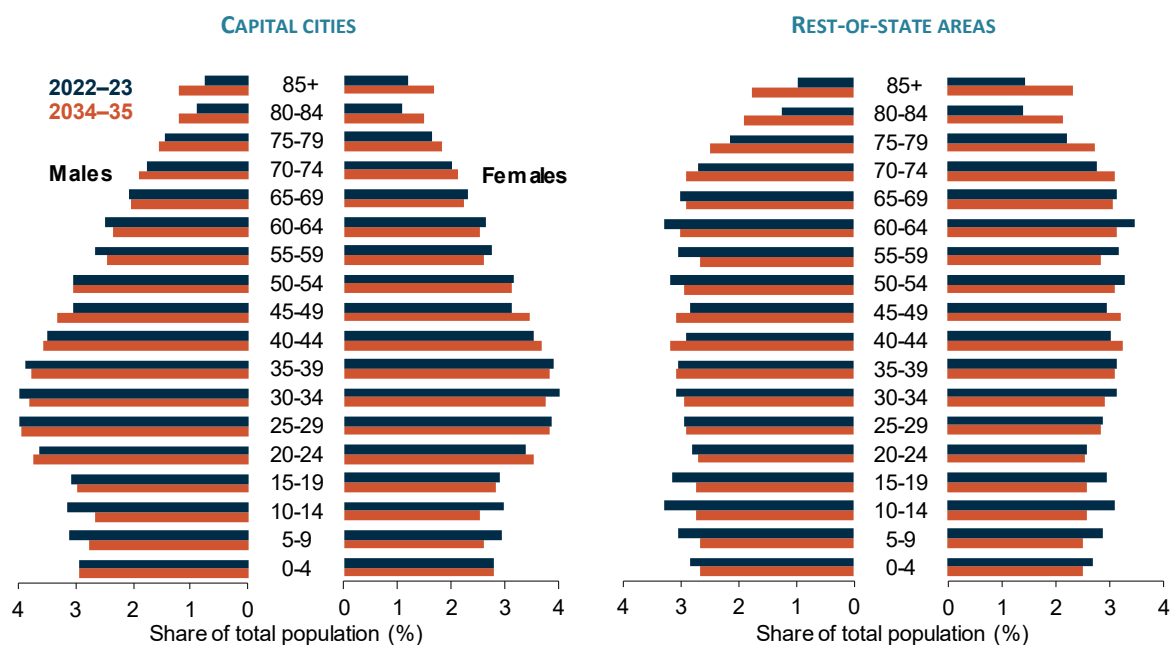
Source: ABS, *Regional Population by age and sex, 2022–23*; and Centre for Population.

The rest-of-state median age is projected to increase from 41.9 in 2022–23 to 44.6 in 2034–35, almost twice as fast as the increase for capital cities (37.0 in 2022–23 to 38.3 by 2034–35), because:

- net internal migration to rest-of-state areas is concentrated in older age cohorts – there is a pronounced outflow of the population aged around 18 from rest-of-state areas and net movers to rest-of-state areas tend to be older

- fewer international migrants go to rest-of-state areas – around 16 per cent of NOM goes to rest-of-state areas, compared to the rest-of-state population share of around 30 per cent, and

- international migrants to rest-of-state areas are older, with proportionally fewer people aged 16 to 23, and proportionally more aged 24 to 30 (Chart 29).

Chart 29.   AGE DISTRIBUTION OF MIGRATION, TOTAL OVER THE PROJECTION PERIOD

INTERNAL MIGRATION TO REST-OF-STATE AREAS

NET OVERSEAS MIGRATION

Net internal migration

Arrivals

Departures

Capital cities (LHS)

Rest of state (RHS)
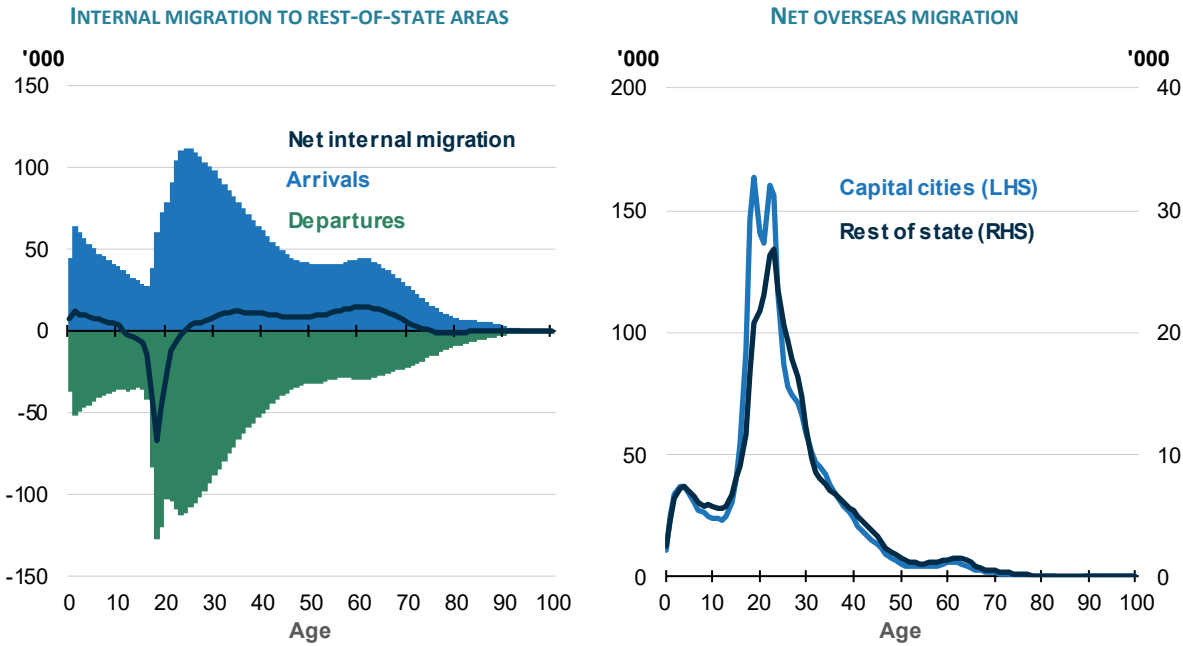
Source: Centre for Population.

Darwin has the lowest median age among capital cities, and this is expected to continue over the projection period. Hobart is projected to have the largest increase in median age, from 38.9 in 2022–23 to 44.2 in 2034–35, driven by the older age profile of its net internal migration and relatively low share of NOM. As a result, Hobart is projected to overtake Adelaide as the oldest capital city in 2023–24. Sydney, Perth and Melbourne are expected to have the smallest increase in their median age over the next decade, all increasing by less than 1.5 years, reflecting their high share of NOM.

Except for in the Northern Territory, all rest-of-state areas have higher median ages than their respective capital city and are projected to age faster. Rest of Queensland and rest of Northern Territory are expected have the smallest increase in their median age over the next decade and rest of Tasmania is projected to have the largest increase.

2.1.5   INTERNAL MIGRATION

People move for diverse reasons, influenced by factors unique to the individual as well as broader macro-level factors. As part of research commissioned by the Centre for Population, the Centre for International Economics found the most common reasons for people moving are to take up a job, to be near friends and family, and for housing availability and affordability.

Interstate moves have declined as a share of population since the 1990s (Chart 30). The reasons for this decline include an older population that is less likely to relocate, a higher share of dual income households, the increase in working from home, costs associated with moving and adult children moving out of their parents' home later in life.[54] Internal migration patterns vary over time, both in terms of total net moves to each region and the demographics of the people moving (Box 8).

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54 The Centre for International Economics, *Internal Migration in Australia and the impact of government levers*, 2023.

National interstate moves are forecast to be 384,000 in 2024–25, equivalent to 1.4 per cent of the population, and are expected to be 19 per cent below the 2018–19 level (476,000). National moves are projected to recover to around 446,000 in 2026–27 (1.6 per cent of the population) and then increase at a slightly slower rate than growth of the population.

Chart 30.   INTERSTATE MOVES BY SHARE OF POPULATION
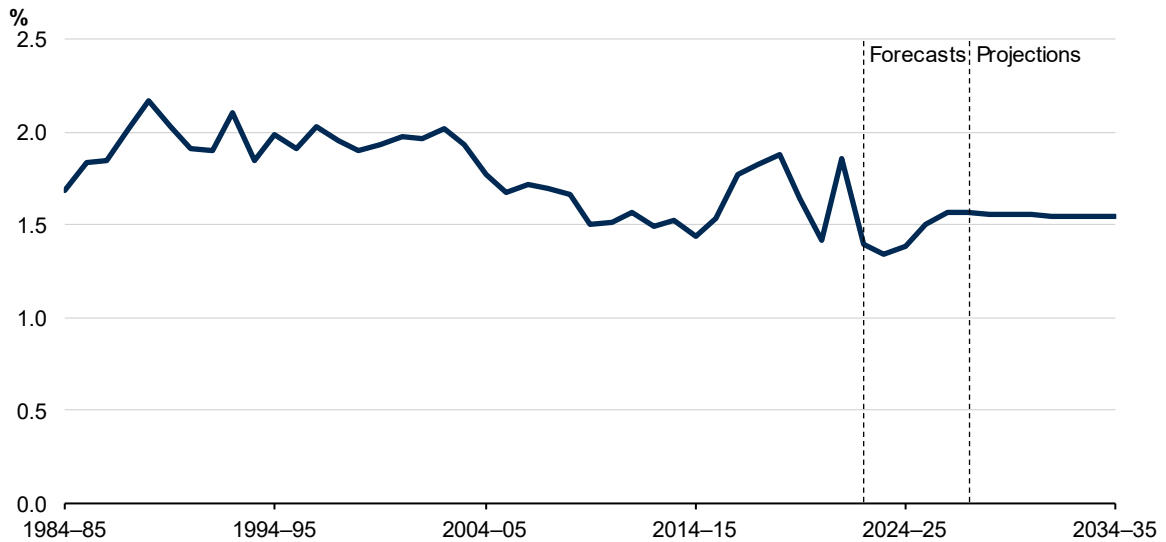
Note: The high level of interstate migration in 2021–22 is the artificial result of people changing their Medicare address during the COVID-19 vaccination rollout (pages 23–24 of the 2022 Population Statement provide further details).

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

In aggregate, internal migration flows from capital cities to rest-of-state areas. Net moves were elevated during the pandemic, with fewer departures from rest-of-state areas to capital cities but fell below 2017–18 levels in 2022–23 (Chart 31). Net moves increased to 31,000 in the year to March 2024, 0.9 per cent above 2017–18 levels. Net internal migration to rest-of-state areas is projected to fall to 20,000 by 2026–27 and then increase to around 30,000 by 2034–35. This is driven by faster population growth in capital cities, which means departures from capital cities to rest-of-state areas are growing faster than flows in the opposite direction.

Chart 31. NET INTERNAL MIGRATION TO REST-OF-STATE AREAS, QUARTERLY

Note: No data is available for June 2021 to December 2021, for more information see ABS, *Regional internal migration estimates, provisional, March 2021*.

Source: ABS, *National, state and territory population, March 2024, March 2023, December 2022;* and ABS, *Regional internal migration estimates, provisional, March 2021.*

BOX 8.   INTERNAL MIGRATION PATTERNS AND HOW THEY HAVE CHANGED OVER TIME

Internal migration generally follows long-standing trends and patterns across the states. Some states have cycles of growth and decline, while others experience ongoing net increases or decreases over time.

INTERNAL MIGRATION PATTERNS

Most interstate moves occur between Australia's most populous states: New South Wales, Queensland and Victoria. South Australia, Tasmania, the Northern Territory and the Australian Capital Territory have smaller populations and experience much lower levels of interstate movement. Historically, interstate movement in Western Australia tends to fluctuate with labour demand cycles in the mining industry.

Since 1987, Queensland has typically had a net intake of internal migrants across all age groups, with the age groups with the highest NIM being those aged between 35 to 49 and children aged under 14 (assumed to have the same movement patterns as their parent or guardian). Conversely, New South Wales, the Northern Territory and South Australia have tended to have net outflows of interstate migrants. Other states, such as Victoria, Western Australia, Tasmania and the Australian Capital Territory, are less consistent with periods of either receiving or losing internal migrants.

Chart 32.   NET INTERSTATE MIGRATION DISTRIBUTION FOR AUSTRALIA
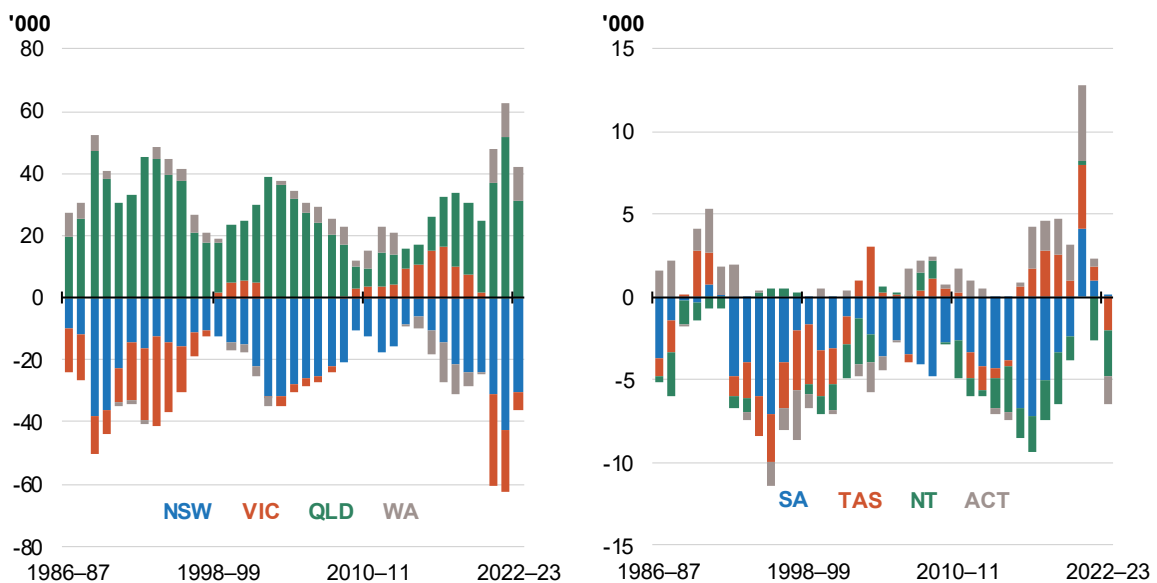
Source: ABS, *National, state and territory population, March 2024*; and Centre for Population

CHANGES IN INTERSTATE MIGRATION BY AGE GROUP FROM 1996–97 TO 2022–23

In 1996–97 and 2022–23, 20 to 34-year-olds were most likely to move interstate, while those aged over 40 and children under 14 (assumed to have the same movement patterns as their parent or guardian) were least likely to relocate (Chart 33). These trends are consistent with the Centre for International Economics research which found that younger adults are most likely to move interstate for reasons including higher education and career opportunities. Families are more likely to move before their children have started school – as children age, and settle into school, families become less likely to move.

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All age groups except for women aged between 60 to 69 were less likely to move in 2022–23 than they were in 1996–97. The greatest proportional falls in interstate movement were to people aged under 29, with those aged between 20 and 29 experiencing the highest proportional drop in interstate movement. Despite the large drop from 1996–97, interstate movement was highest in the 20 to 29-year-old cohorts.

There were fewer interstate moves by people aged over 40 and for children under 14. One reason for this decline could be due to the rise in the proportion of dual income families over the past 20 years.[55] Dual income families require greater benefits from an interstate move to make it worth leaving 2 established careers and networks, resulting in these types of families being less likely to move compared to single income families with two parents.[56] This, by extension, lowers interstate movement in children as more families have both parents earning incomes.

Chart 33. **INTERSTATE MOVES IN 1996–97 AND 2022–23, PROPORTION OF AGE GROUP**
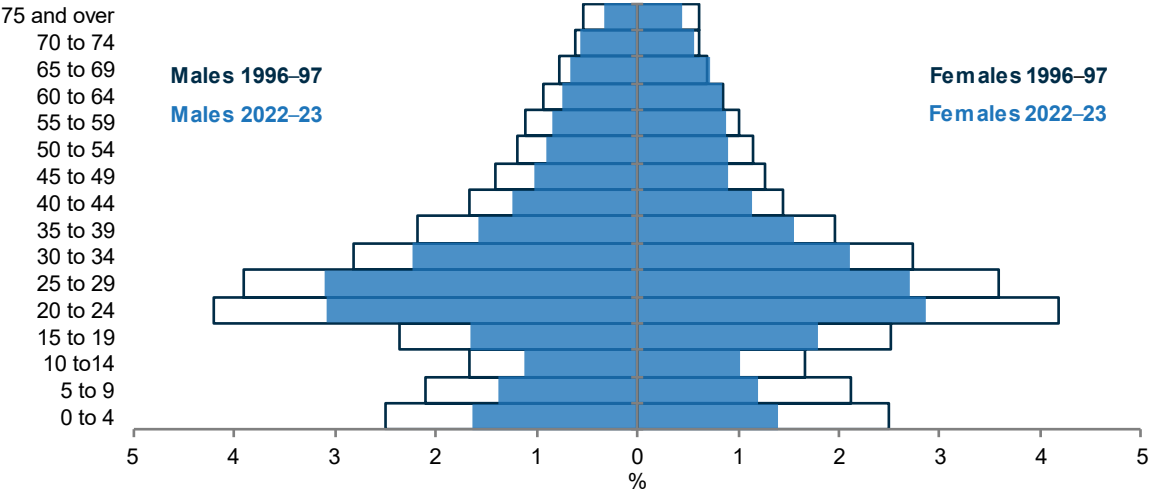
Source: ABS, *National, state and territory population, March 2024*; and Centre for Population.

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55 ABS, *Labour Force Status of Families*, 2024.

56 The Centre for International Economics, *Internal Migration in Australia and the impact of government levers*, 2023.

**BOX 9. THE CHALLENGE OF REDISTRIBUTING GROWTH TO REST-OF-STATE AREAS**

As demonstrated by the following scenarios, even substantial changes to internal and overseas migration patterns would result in only modest redistribution of population growth between capital cities and aggregated rest-of-state areas. In each scenario, total national NOM is the same as in the baseline projections. The scenarios explored are:

- A **high NIM rate scenario**, which fixes the interstate and internal migration rates to the highest net rate of migration to rest-of-state areas observed outside of COVID-19 (in 2023–24).
- A **high NOM share scenario**, where rest-of-state areas receive 25 per cent of national NOM, around 8 percentage points higher than the highest share on record. There is a lack of historical sub-state data for net overseas migration, with the series beginning in 2016–17.
- A **combined scenario**, which combines both the high NIM and high NOM assumptions**.**

In the baseline projections, the population for rest-of-state areas grows from 8.7 million in 2022–23 to 9.6 million in 2034–35 (Chart 34). The high NIM scenario adds around 202,000 people to rest-of-state areas compared to the baseline by 2034–35, reaching a population of 9.8 million. Under the high NOM scenario, there are around 361,000 more people by 2034–35, reaching a population of 10.0 million. The combined scenario results in a population of 10.1 million in 2034–35, around 461,000 (4.8 per cent) higher than in the baseline projections. The reason that the combined impact is smaller than the sum of the separate NIM and NOM scenarios is because higher population growth in rest-of-state areas leads to more NIM departures to capital cities.

Even if net interstate migration remained at historically high rates and NOM to rest-of-state areas is greatly increased, the population in aggregated rest-of-state areas would not grow faster than aggregated capital cities. In the combined scenario, the population growth rate of aggregated rest-of-state areas is still slightly below aggregated capital cities, with both growing at around 1.2 per cent per year from 2025–26.

Chart 34. REST-OF-STATE POPULATION MIGRATION SCENARIOS

POPULATION LEVELS

POPULATION GROWTH RATES
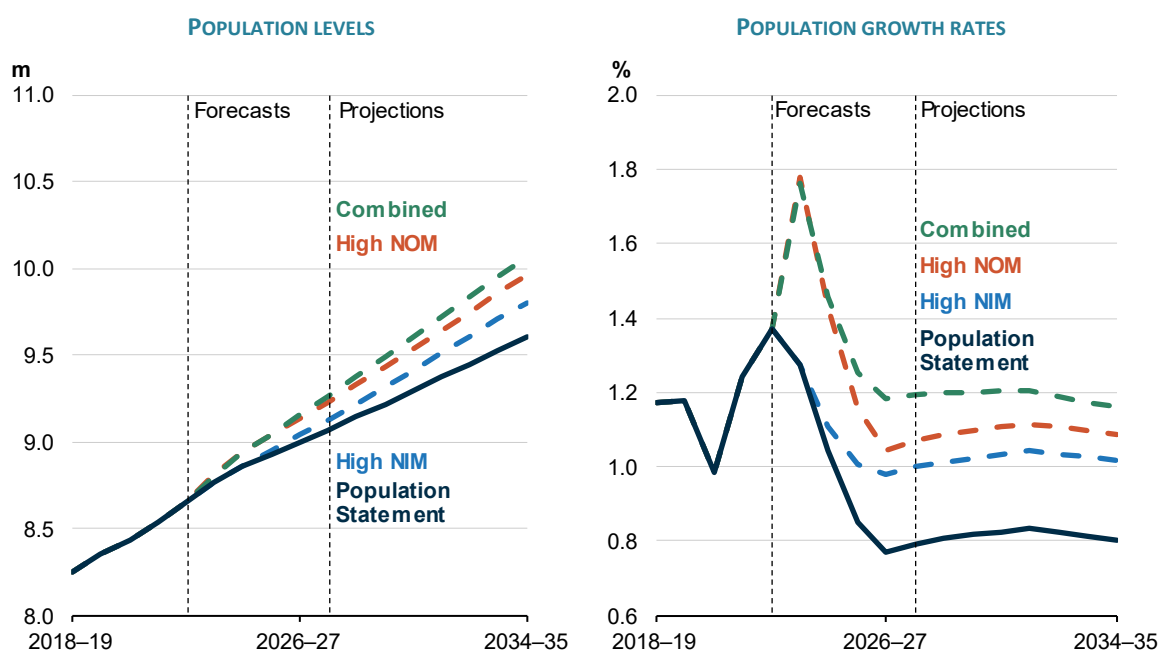
Source: ABS, *Regional population, 2022–23;* and Centre for Population.

BOX 10. INSIGHTS FROM REGIONAL POPULATION DATA

The Bureau of Communications, Arts and Regional Research (BCARR) produces a geographic classification, grouping areas based on their location and population. The 6 geographic classifications are:

- Greater capital cities
- Coastal cities
- Inland cities
- Remote areas
- Coastal country
- Inland country

POPULATION

Around 18.0 million people (68 per cent of the population) live in capital cities, with a further 4.3 million (16 per cent) in coastal cities. Inland cities, coastal country areas and inland country areas are each home to around 1.3 to 1.4 million people (around 5 per cent of the population). About 338,000 people reside in remote areas (1 per cent of the population).

Cities tend to have a younger age profile than the rest of Australia. However, cities in South Australia and Tasmania tend to have older populations than the nation as a whole. Coastal country and inland country areas have a relatively high share of population aged 65 and over. Remote Australia has the highest share of population aged under 20 and the lowest share of population aged 65 and over.

GROWTH AND ITS COMPONENTS

Growth patterns vary considerably across the geographic groupings. Capital cities have tended to have the highest population growth over the last several years, closely followed by coastal cities (Chart 35). Lifestyle factors make coastal country areas the fastest growing non-urban region, with similar growth patterns to coastal cities. Population growth in remote areas has large fluctuations, reflecting patterns in mining activity.

Chart 35. CONTRIBUTION TO GROWTH BY AGGREGATED REGIONAL CATEGORY
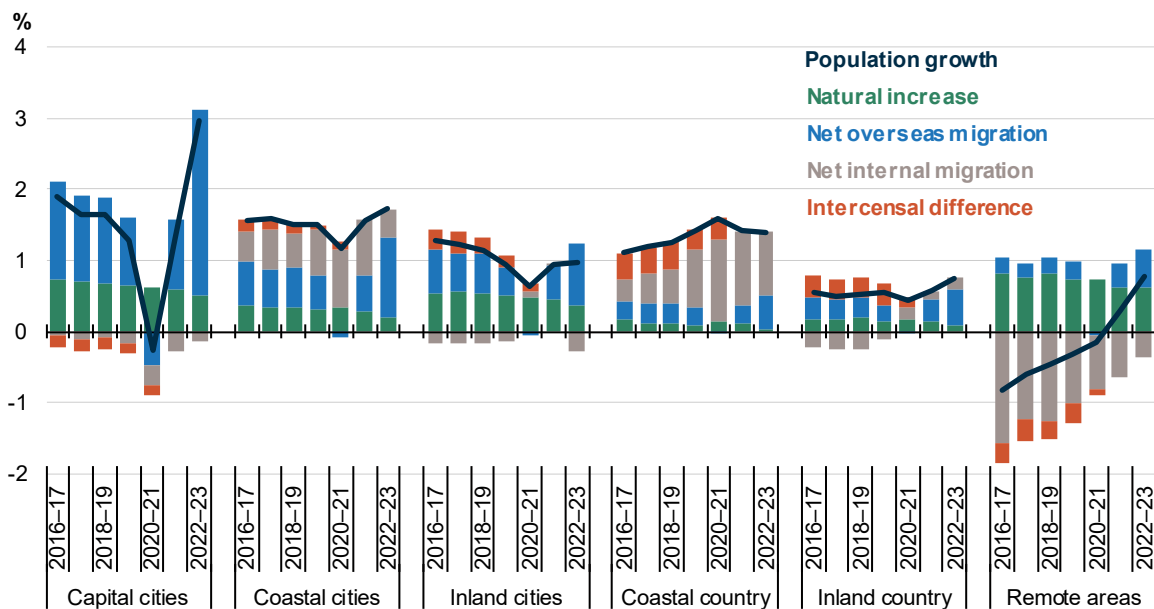
Note: Intercensal difference (the growth that the ABS is not able to apportion to any components) was negative for capital cities and remote areas, indicating NIM and/or NOM to these regions was likely overcounted over 2016–17 to 2020–21. Some geographical boundaries were redefined from 2021, resulting in a time-series break between the component contribution before and after 2020–21.

Source: ABS, *Regional population, 2020–21*; ABS, *Regional population, 2022–23*; and Centre for Population.

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Cities and remote areas tend to experience more population growth from natural increase due to their younger populations. Coastal country areas – the geography with the oldest population – had negligible natural increase to the population in 2022–23 (0.02 percentage points or 12,600 births less 12,200 deaths).

NOM was negative across the 6 geographic categories in 2020–21 but has recovered to be above pre-pandemic levels in 2022–23. Cities tend to have more NOM, with around 85 per cent of NOM going to capital cities (around 60 per cent of the national total goes to Melbourne and Sydney) and around 10 per cent to coastal cities.

NIM has tended to flow to coastal areas, both city and country, over the past several years. These flows originate primarily from capital cities, along with smaller components from inland and remote locations. NIM for remote areas has become less negative over the last several years, driven by smaller net outflows from Western Australia and Queensland.

WHICH PARTS OF CAPITAL CITIES ARE GROWING FASTEST?

Within capital cities, population growth varies with distance from the city centre (Chart 36). Growth in inner city areas and middle-ring suburbs, particularly areas within 5 kilometres of the city centre, has been driven by overseas migration. In these areas, natural increase modestly contributes to growth, while there is a net outflow of internal migrants, which drags on overall growth.

Further away from city centres (30 to 50 kilometres), strong population growth has been driven by large net internal migration inflows and stronger natural increase than in inner city areas, reflecting the desire of young families for affordable detached housing. Distances beyond 50 kilometres account for a small share of capital city population and had low growth in 2021–22 and 2022–23.

Chart 36. CONTRIBUTION TO GROWTH BY DISTANCE FROM CITY CENTRE
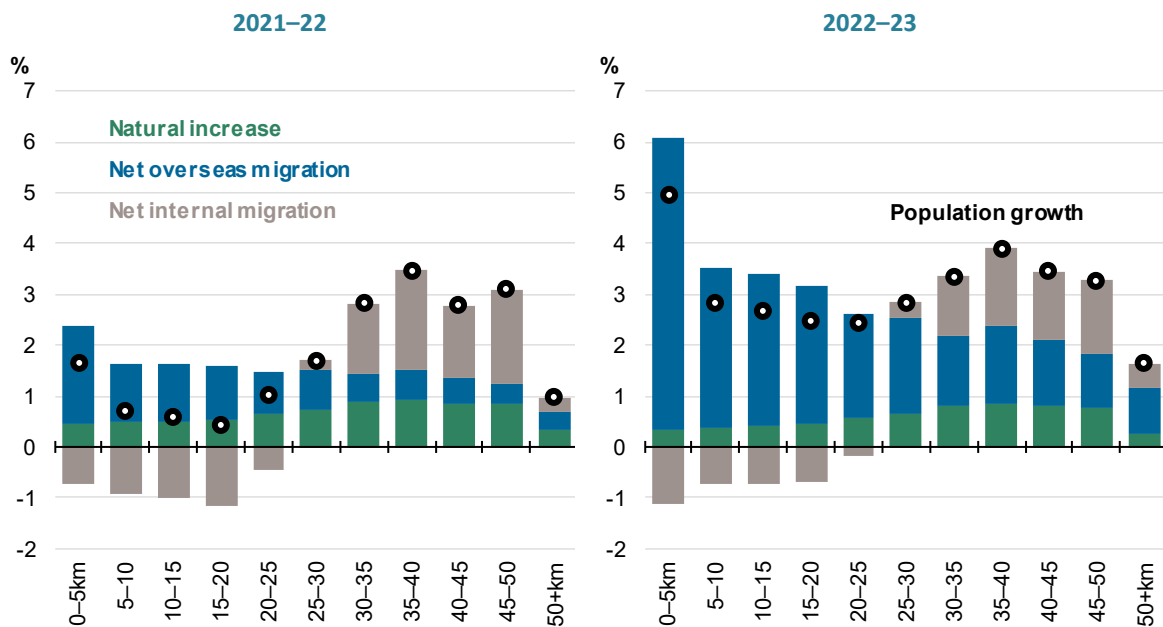
Note: Distance from city centre is measured using the SA1 population-weighted centre of each SA2.
Source: ABS, *Regional population, 2022–23;* and Centre for Population.

New South Wales is Australia's most populous state and is projected to remain so over the coming decade. Its population is expected to increase from 8.5 million in 2023–24 to 9.6 million in 2034–35. Population growth is expected to decline to 1.9 per cent in 2023–24 and 1.4 per cent in 2024–25 and stabilise around 1.1 per cent from 2026–27.

NOM is projected to remain the largest contributor to population growth in New South Wales, but it is expected to subside and contribute around 0.9 percentage points to growth per year from 2025–26. New South Wales has historically had a high level of net interstate departures. Net interstate migration is projected to ease to an outflow of 30,000 in 2023–24 and 20,000 (0.2 per cent of population) from 2026–27 onwards.

Chart 37. POPULATION GROWTH IN NEW SOUTH WALES
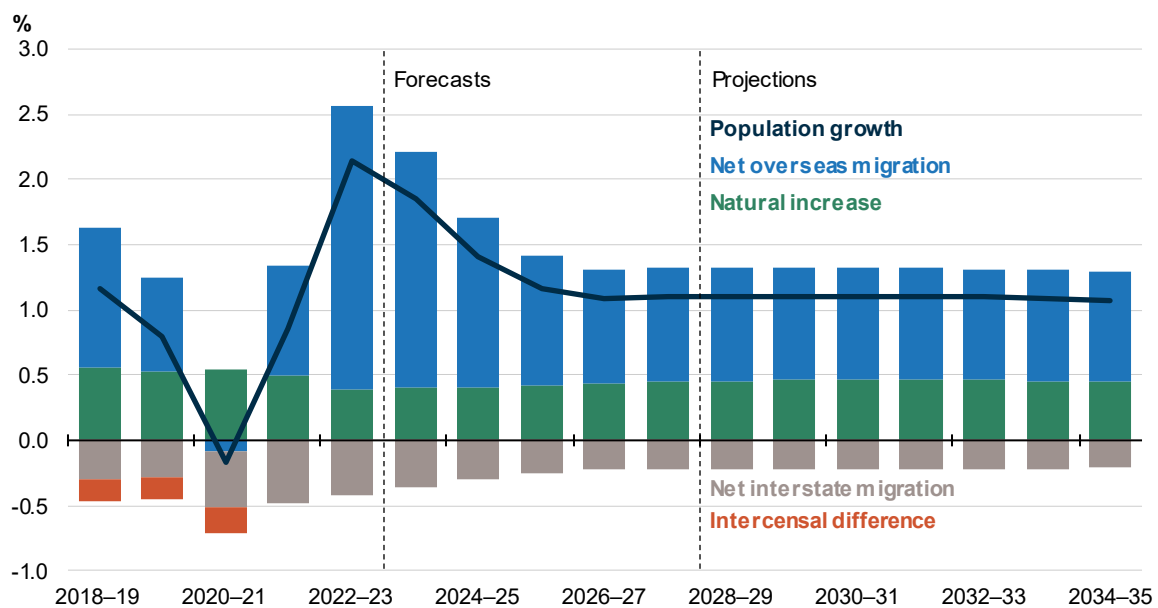
Source: ABS, *National, state and territory population, March 2024*; and Centre for Population.

Greater Sydney's population is expected to be 5.6 million in 2023–24, making it Australia's largest city with 66 per cent of the New South Wales population and 20.5 per cent of the national population. Greater Sydney's population growth rate is expected to fall to 2.3 per cent in 2023–24 and 1.7 per cent in 2024–25. This decline in the growth rate is mainly driven by the fall in NOM, although it will continue to be the largest contributor to Greater Sydney's growth. Greater Sydney has by far the largest net internal migration outflow of any capital city, which is projected to subtract around 0.5 percentage points from growth each year. For 2026–27 onwards, population growth is expected to be around 1.3 per cent, with the population reaching 6.5 million in 2034–35.

The **rest of New South Wales** is projected to grow from 2.9 million people in 2023–24 to 3.1 million people in 2034–35. Over this same period, the growth rate is expected to fall from 0.9 per cent to 0.7 per cent. This decline is mainly driven by lower NOM. Natural increase contributed 0.1 per cent to growth in 2022–23 and is projected to be only slightly positive by 2034–35.

Chart 38. POPULATION GROWTH IN NEW SOUTH WALES, SYDNEY AND THE REST OF NEW SOUTH WALES
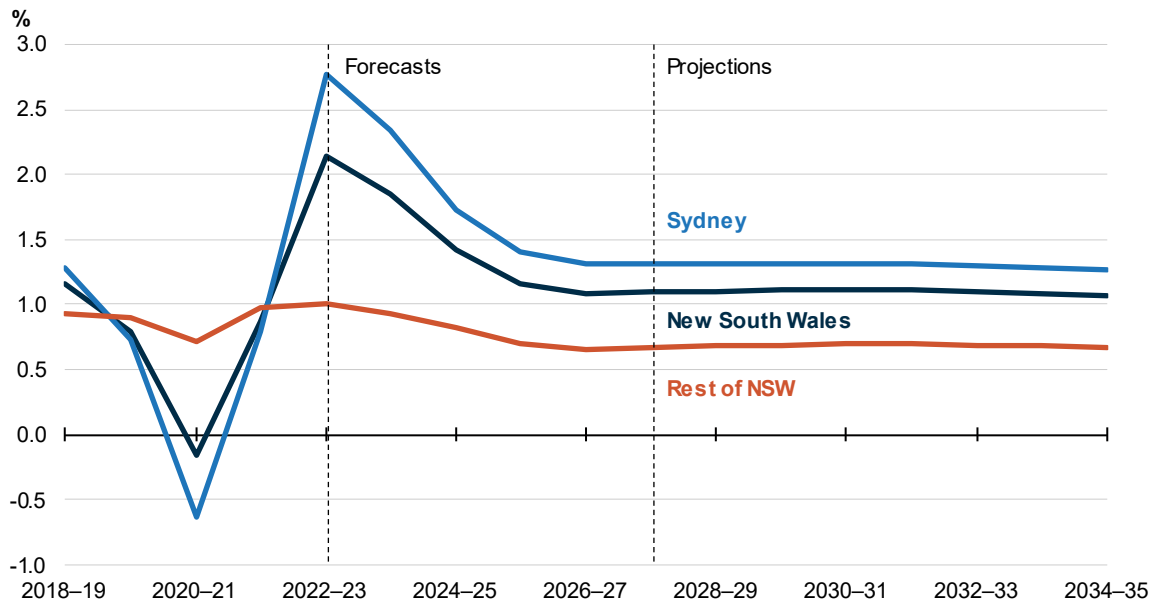
Source: ABS, *Regional population, 2022–23*, ABS, *National, state and territory population, March 2024*; and Centre for Population.

Table 4.   POPULATION PROJECTIONS, NEW SOUTH WALES

|	2022–23	2023–24	2024–25	2025–26	2026–27	2034–35
Population ('000)						
New South Wales	8,342	8,496	8,616	8,716	8,811	9,614
Greater Sydney	5,450	5,578	5,674	5,753	5,828	6,465
Rest of New South Wales	2,892	2,919	2,942	2,963	2,982	3,149
Population growth (per cent)						
New South Wales	2.1	1.8	1.4	1.2	1.1	1.1
Greater Sydney	2.8	2.3	1.7	1.4	1.3	1.3
Rest of New South Wales	1.0	0.9	0.8	0.7	0.7	0.7
Population growth ('000)						
New South Wales	175.4	154.3	120.0	99.9	94.4	102.1
Greater Sydney	146.7	127.5	96.2	79.3	75.1	81.2
Rest of New South Wales	28.9	26.8	23.9	20.7	19.3	20.9
Natural increase ('000)						
New South Wales	31.6	33.5	33.8	36.0	37.6	42.2
Greater Sydney	28.5	32.2	32.7	34.4	35.8	42.2
Rest of New South Wales	4.1	1.3	1.1	1.5	1.8	0.0
Net overseas migration ('000)						
New South Wales	178.0	150.9	111.8	86.1	76.8	80.3
Greater Sydney	156.6	131.8	96.7	73.4	64.9	68.1
Rest of New South Wales	20.5	19.1	15.1	12.7	11.9	12.1
Net internal migration ('000)						
New South Wales	-34.2	-30.1	-25.6	-22.1	-20.0	-20.3
Greater Sydney	-38.4	-36.5	-33.2	-28.5	-25.6	-29.1
Rest of New South Wales	4.3	6.4	7.7	6.4	5.6	8.7
Median age (years)						
New South Wales	38.4	38.4	38.4	38.5	38.6	39.7
Greater Sydney	36.8	36.7	36.7	36.7	36.8	37.6
Rest of New South Wales	42.4	42.5	42.6	42.9	43.1	45.0

Source: ABS, *National, state and territory population, March 2024*; ABS, *Regional population, 2022–23*; and Centre for Population.

2.3 VICTORIA

Victoria is projected to grow from a population of 7.0 million in 2023–24 to 8.2 million in 2034–35. Growth is forecast to fall to 2.5 per cent in 2023–24 and 1.9 per cent in 2024–25, declining to 1.4 per cent in 2034–35. Victoria is projected to be the second fastest growing state over the projection period, slightly behind Western Australia.

Outside of the COVID-19 disruptions in 2020–21, NOM has consistently been the largest contributor to Victoria's population growth. NOM is expected to subside, contributing around 0.9 percentage points to growth per year from 2025–26, the largest of any state, and most of the state's growth. Net interstate migration to Victoria was positive in the March quarter of 2024, for the first time since the pandemic. Net interstate migration is projected to add slightly to Victoria's population growth as it returns to trend levels.

Chart 39. POPULATION GROWTH IN VICTORIA
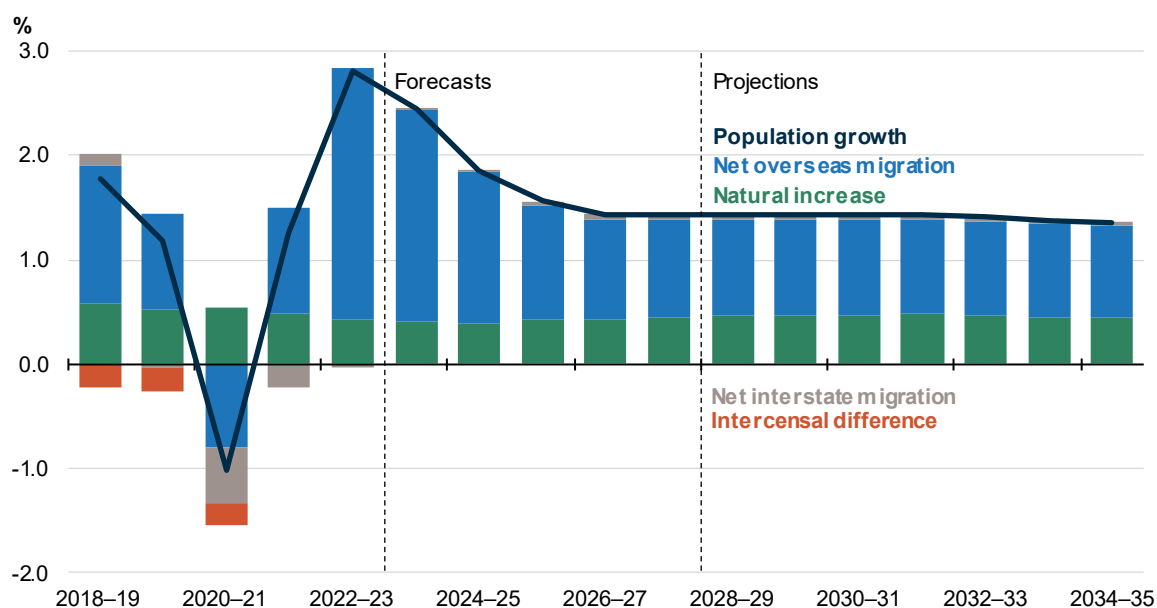
Source: ABS, *National, state and territory population, March 2024*; and Centre for Population.

In 2023–24, **Greater Melbourne**'s population is expected to be 5.4 million, accounting for 77 per cent of Victoria's population and 19.7 per cent of the national population. Greater Melbourne's population growth is expected to fall to 2.9 per cent in 2023–24 and 2.2 per cent in 2024–25 as NOM declines. Melbourne is projected to be one of the top 2 fastest growing capital cities, with growth similar to Perth. With this projected growth, Greater Melbourne is expected to reach 6.4 million people in 2034–35, bringing it to within 0.5 per cent of Greater Sydney's population.

In 2023–24, the **rest of Victoria** is expected to have a population of 1.6 million. Population growth is expected to decline to 1 per cent in 2023–24 and 0.9 per cent in 2024–25. By 2034–35, population growth is expected to fall to 0.8 per cent, with roughly equal contributions from declining net overseas and internal migration. Natural increase for the rest of Victoria is expected to be slightly negative (that is, more deaths than births) in 2024–25, return to being slightly positive from 2025–26 before becoming negative again from 2032–33.

Chart 40.   POPULATION GROWTH IN VICTORIA, MELBOURNE AND THE REST OF VICTORIA
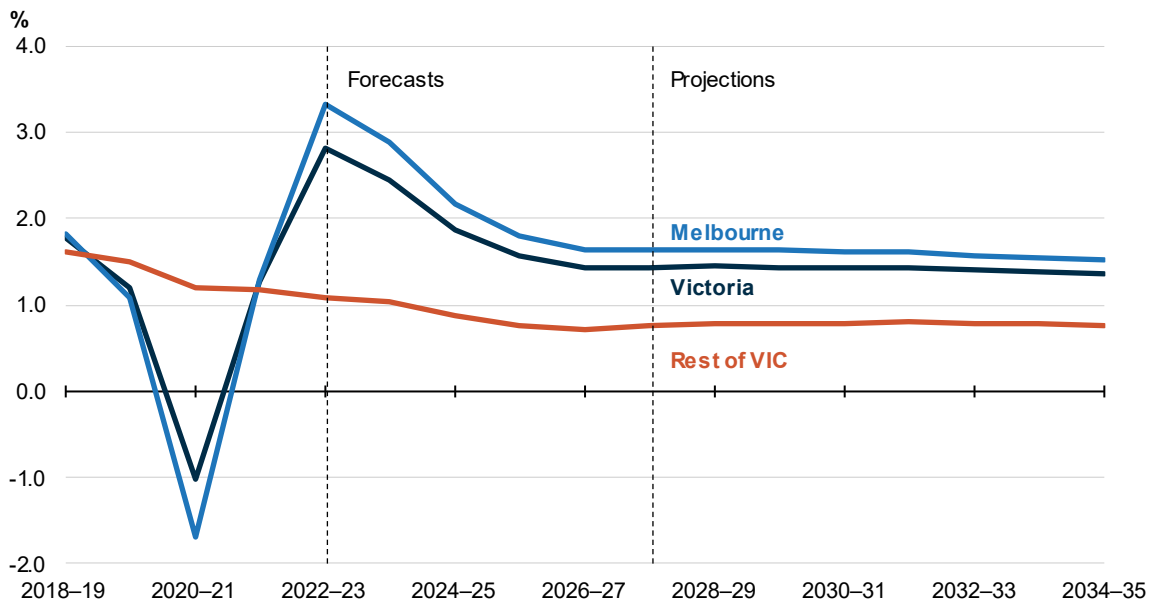
Source: ABS, *Regional population, 2022–23*; ABS, *National, state and territory population, March 2024*; and Centre for Population.

Table 5. POPULATION PROJECTIONS, VICTORIA

|	2022–23	2023–24	2024–25	2025–26	2026–27	2034–35
Population ('000)						
Victoria	6,817	6,983	7,113	7,224	7,328	8,199
Greater Melbourne	5,207	5,358	5,474	5,572	5,664	6,429
Rest of Victoria	1,608	1,625	1,639	1,652	1,664	1,770
Population growth (per cent)						
Victoria	2.8	2.4	1.9	1.6	1.4	1.4
Greater Melbourne	3.3	2.9	2.2	1.8	1.6	1.5
Rest of Victoria	1.1	1.0	0.9	0.8	0.7	0.8
Population growth ('000)						
Victoria	186.0	166.7	130.1	110.9	103.7	109.9
Greater Melbourne	167.5	150.0	116.0	98.3	91.8	96.5
Rest of Victoria	17.3	16.7	14.1	12.6	11.9	13.4
Natural increase ('000)						
Victoria	28.1	27.3	27.6	29.7	31.3	35.6
Greater Melbourne	27.4	27.3	27.8	29.6	31.1	36.6
Rest of Victoria	2.1	0.1	-0.1	0.1	0.2	-1.0
Net overseas migration ('000)						
Victoria	159.8	138.6	101.0	78.2	68.5	71.3
Greater Melbourne	146.8	128.2	93.0	71.6	62.4	65.1
Rest of Victoria	10.4	10.3	8.0	6.6	6.1	6.2
Net internal migration ('000)						
Victoria	-1.9	0.8	1.5	3.0	4.0	3.0
Greater Melbourne	-6.7	-5.5	-4.8	-2.9	-1.6	-5.2
Rest of Victoria	4.8	6.3	6.3	5.9	5.6	8.2
Median age (years)						
Victoria	37.8	37.8	37.8	38.0	38.2	39.5
Greater Melbourne	36.6	36.5	36.6	36.7	36.9	38.0
Rest of Victoria	43.2	43.3	43.5	43.8	44.1	46.3

Source: ABS, *National, state and territory population, March 2024*; ABS, *Regional population, 2022–23*; and Centre for Population.

Queensland's population is projected to increase from 5.6 million in 2023–24 to 6.5 million in 2034–35. Growth is forecast to fall to 2.3 per cent in 2023–24 and 1.8 per cent in 2024–25, before declining to 1.3 per cent in 2034–35.

NOM is forecast to be the primary driver of population growth in Queensland for the first few forecast years, with roughly equal contributions from net interstate migration and natural increase over the projection period. Queensland receives the highest interstate migration of any state. Despite this, Queensland is projected to be the third fastest growing state, behind Western Australia and Victoria because of Queensland's relatively low share of NOM.

Chart 41.   POPULATION GROWTH IN QUEENSLAND
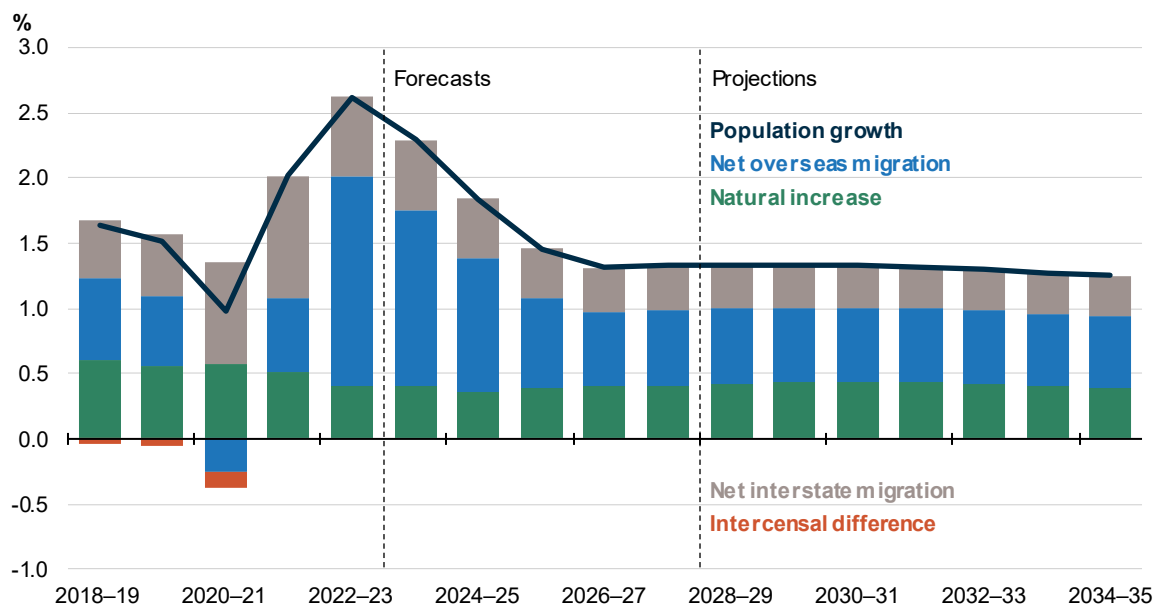
Source: ABS, *National, state and territory population, March 2024;* and Centre for Population.

The population of **Greater Brisbane** is expected to be 2.8 million in 2023–24, representing 50 per cent of Queensland's population. Population growth in Brisbane is forecast to decrease to 2.7 per cent in 2023–24 and 2.2 per cent in 2024–25, slowing to 1.4 per cent by 2034–35. Brisbane is projected to continue attracting the highest level of internal migrants of any capital city, but NOM is expected to be the largest source of its population growth. Brisbane's population is projected to account for over half the state's population from 2025–26 (2 years sooner than previously forecast), which would be the first time since 1978 that Greater Brisbane has had a larger population than the rest of Queensland. Brisbane's population is projected to be 3.3 million in 2034–35.

The population of the **rest of Queensland** is expected to be 2.8 million in 2023–24 (26,000 higher than Greater Brisbane), one of only 2 states where the rest-of-state population is larger than the capital city. Strong flows of overseas and internal migration contributed to relatively strong population growth in 2022–23, and growth is forecast to decline to 1.9 per cent in 2023–24 and 1.5 per cent in 2024–25 as overseas and internal migration moderates. The rest of Queensland will be the strongest growing rest-of-state area over the projection period, mostly driven by NOM. The contribution to growth from natural increase and internal migration is strong relative to other rest-of-state areas. The population of the rest of Queensland is projected to be 3.2 million in 2034–35, overtaking rest of NSW as the most populous rest-of-state area in 2031–32.

Chart 42.   POPULATION GROWTH IN QUEENSLAND, GREATER BRISBANE AND THE REST OF QUEENSLAND
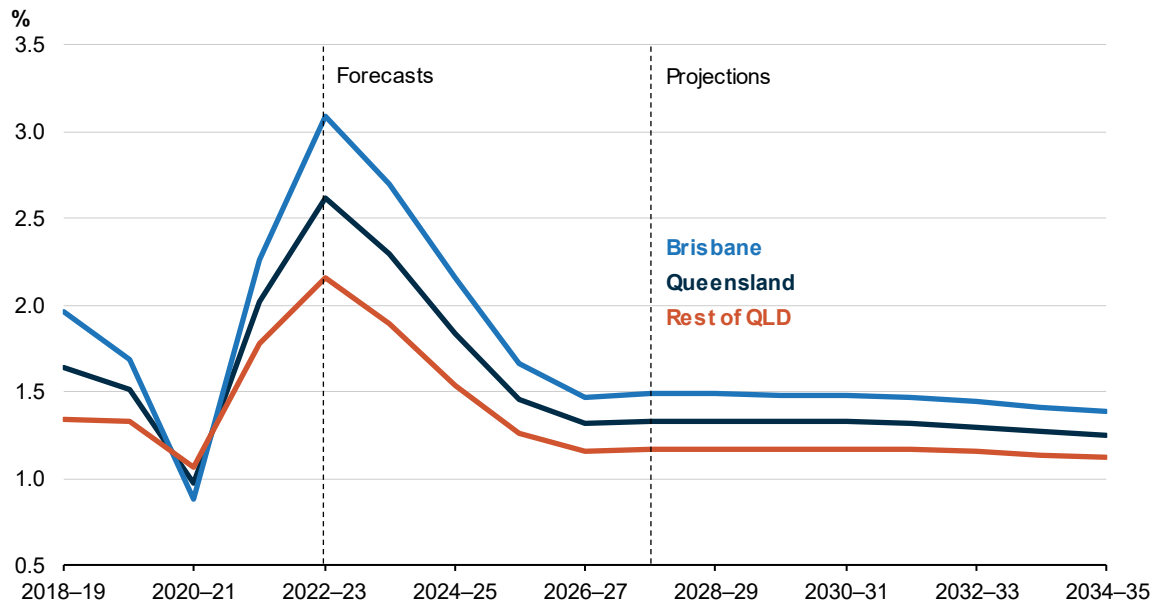
Source: ABS, *Regional population, 2022–23*; ABS, *National, state and territory population, March 2024*; and Centre for
Population.

Table 6. POPULATION PROJECTIONS, QUEENSLAND

	2022–23	2023–24	2024–25	2025–26	2026–27	2034–35
Population ('000)						
Queensland	5,460	5,586	5,688	5,772	5,847	6,487
Greater Brisbane	2,707	2,780	2,840	2,887	2,930	3,288
Rest of Queensland	2,753	2,806	2,849	2,884	2,918	3,199
Population growth (per cent)						
Queensland	2.6	2.3	1.8	1.5	1.3	1.3
Greater Brisbane	3.1	2.7	2.2	1.7	1.5	1.4
Rest of Queensland	2.2	1.9	1.5	1.3	1.2	1.1
Population growth ('000)						
Queensland	139.4	125.3	102.8	83.1	75.8	80.2
Greater Brisbane	81.2	73.1	59.8	47.2	42.5	44.8
Rest of Queensland	58.3	52.3	42.9	35.9	33.3	35.3
Natural increase ('000)						
Queensland	21.3	21.7	20.3	21.9	23.1	25.2
Greater Brisbane	14.1	14.8	14.2	15.1	15.8	17.6
Rest of Queensland	8.1	6.9	6.2	6.8	7.3	7.6
Net overseas migration ('000)						
Queensland	85.9	73.6	56.9	39.2	33.0	35.0
Greater Brisbane	51.8	45.0	34.2	22.8	18.8	20.3
Rest of Queensland	33.2	28.6	22.6	16.4	14.2	14.7
Net internal migration ('000)						
Queensland	32.3	30.0	25.5	21.9	19.7	19.9
Greater Brisbane	15.3	13.4	11.4	9.3	8.0	6.9
Rest of Queensland	16.9	16.7	14.1	12.7	11.7	13.0
Median age (years)						
Queensland	38.5	38.5	38.6	38.8	39.0	40.5
Greater Brisbane	36.5	36.5	36.6	36.8	37.0	38.5
Rest of Queensland	40.7	40.8	40.9	41.1	41.3	42.8

Source: ABS, *National, state and territory population, March 2024*; ABS, *Regional population, 2022–23*; and Centre for Population.
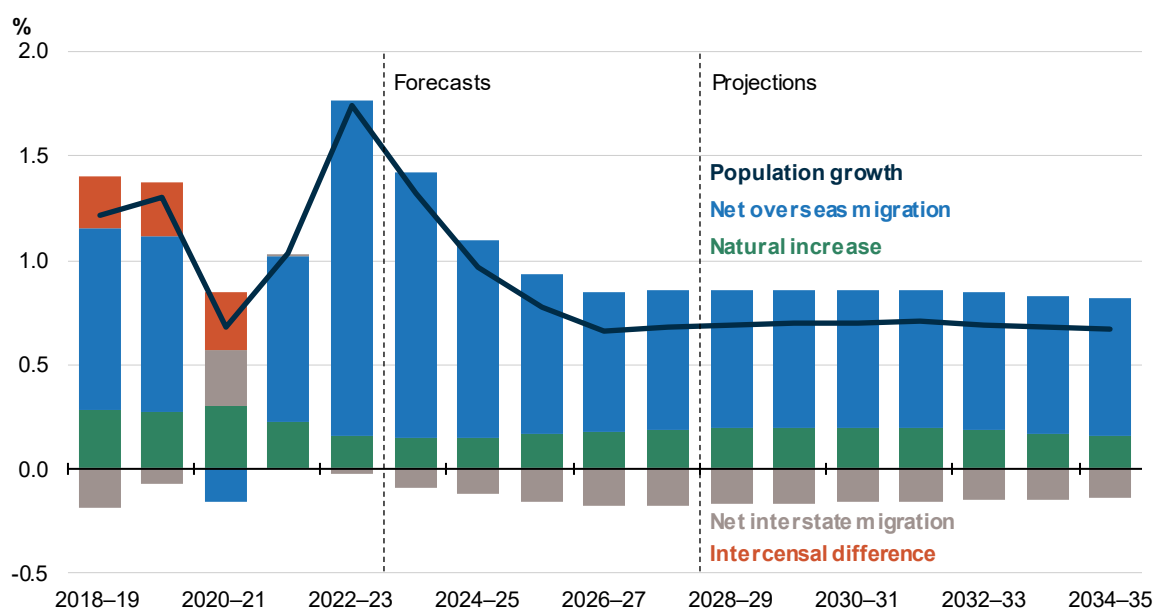
2.5 SOUTH AUSTRALIA

South Australia's population is projected to increase from 1.9 million in 2023–24 to 2.0 million in 2034–35. Population growth is forecast to decline to 1.3 per cent in 2023–24 and 1.0 per cent in 2024–25, before gradually declining to 0.7 per cent by 2034–35. South Australia is projected to have the second lowest population growth from 2026–27, exceeding only Tasmania.

NOM is forecast to drive almost all of the population growth in South Australia, contributing 97 per cent between 2024–25 and 2034–35. The contribution from natural increase to South Australia's population growth is expected to be the second weakest of any state after Tasmania. Net interstate migration is expected to subtract around 0.2 percentage points from growth in each of the projection years.

Chart 43.   POPULATION GROWTH IN SOUTH AUSTRALIA

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

Greater Adelaide's population is expected to be 1.5 million in 2023–24, representing 78 per cent of South Australia's population. Population growth in Adelaide is forecast to decrease to 1.5 per cent in 2023–24 and 1.1 per cent in 2024–25, slowing to 0.8 per cent by 2034–35. Similar to the state-level projections, the majority of growth is expected to come from NOM, with positive natural increase largely offset by internal migration outflows. Adelaide's population is projected to be 1.6 million in 2034–35.

The population of the **rest of South Australia** is expected to be 409,000 in 2023–24. Population growth is forecast to increase to 0.8 per cent in 2023–24 before falling to 0.6 per cent in 2024–25. Natural decrease is projected to detract more from growth than in any other rest-of-state area, reflecting the rest of South Australia's ageing population. Population growth is projected to be the slowest of any rest-of-state area from 2026–27 to 2029–30. Low growth is projected to lead to internal migration departures growing more slowly than arrivals, which leads to population growth recovering slightly to 0.3 per cent in 2034–35. The rest of South Australia's population is projected to be 421,000 in 2034–35.

Chart 44. POPULATION GROWTH IN SOUTH AUSTRALIA, GREATER ADELAIDE AND THE REST OF SOUTH AUSTRALIA
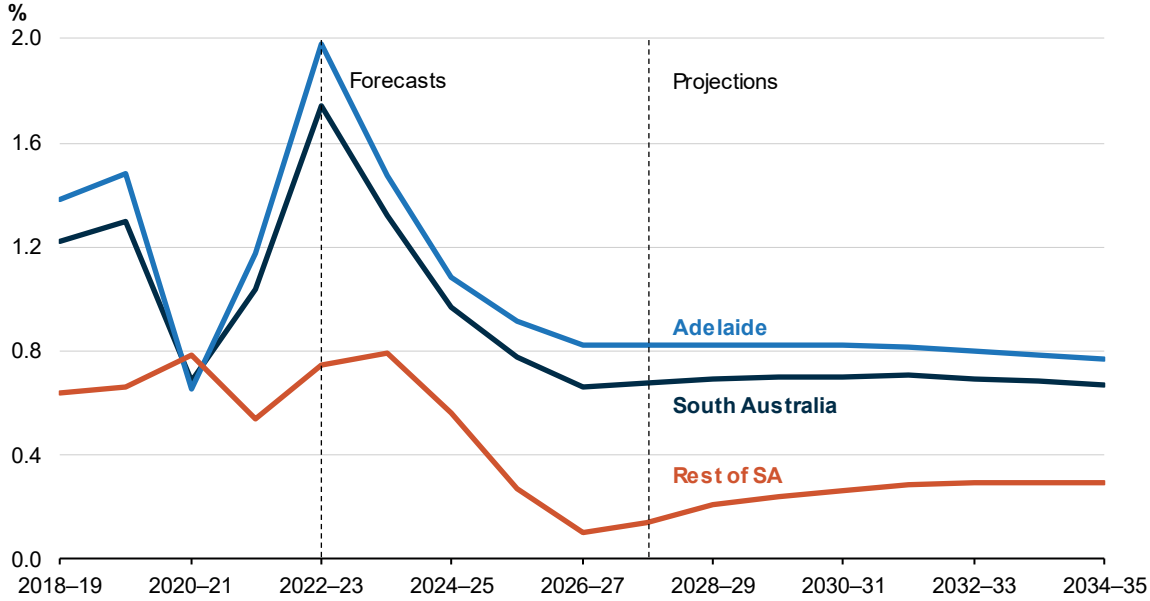
Source: ABS, *Regional population, 2022–23*; ABS, *National, state and territory population, March 2024*; and Centre for Population.

Table 7. POPULATION PROJECTIONS, SOUTH AUSTRALIA

|	2022–23	2023–24	2024–25	2025–26	2026–27	2034–35
Population ('000)						
South Australia	1,853	1,877	1,896	1,910	1,923	2,032
Greater Adelaide	1,446	1,468	1,484	1,498	1,510	1,610
Rest of South Australia	406	409	412	413	413	421
Population growth (per cent)						
South Australia	1.7	1.3	1.0	0.8	0.7	0.7
Greater Adelaide	2.0	1.5	1.1	0.9	0.8	0.8
Rest of South Australia	0.7	0.8	0.6	0.3	0.1	0.3
Population growth ('000)						
South Australia	31.7	24.5	18.2	14.7	12.7	13.6
Greater Adelaide	28.1	21.3	15.9	13.6	12.3	12.3
Rest of South Australia	3.0	3.2	2.3	1.1	0.4	1.2
Natural increase ('000)						
South Australia	2.9	2.8	2.7	3.1	3.4	3.2
Greater Adelaide	3.4	3.5	3.5	3.8	4.0	4.2
Rest of South Australia	-0.4	-0.7	-0.8	-0.7	-0.7	-1.0
Net overseas migration ('000)						
South Australia	29.3	23.5	17.8	14.6	12.8	13.3
Greater Adelaide	26.5	21.6	16.4	13.5	11.7	12.1
Rest of South Australia	2.0	1.9	1.4	1.2	1.1	1.2
Net internal migration ('000)						
South Australia	-0.4	-1.7	-2.3	-3.0	-3.5	-2.9
Greater Adelaide	-1.8	-3.9	-3.9	-3.7	-3.5	-3.9
Rest of South Australia	1.4	2.1	1.6	0.6	0.0	1.0
Median age (years)						
South Australia	40.5	40.5	40.7	40.9	41.1	42.5
Greater Adelaide	39.2	39.2	39.3	39.5	39.7	40.9
Rest of South Australia	46.8	46.9	47.1	47.3	47.7	49.8

Source: ABS, *National, state and territory population, March 2024*; ABS, *Regional population, 2022–23;* and Centre for Population.

Western Australia's population is projected to grow from 3.0 million in 2023–24 to 3.5 million by 2034–35. Western Australia is expected to be the fastest growing state over most of the projection period, with growth falling from 2.8 per cent in 2023–24 to 2.2 per cent in 2024–25 and 1.4 per cent in 2034–35.

NOM is forecast to contribute the majority of population growth in Western Australia over the projection period, the second highest contribution to growth from NOM of any state or territory. Net interstate migration is expected to decline in 2023–24 and return to be broadly neutral from 2026–27.

Chart 45.   Population growth in Western Australia
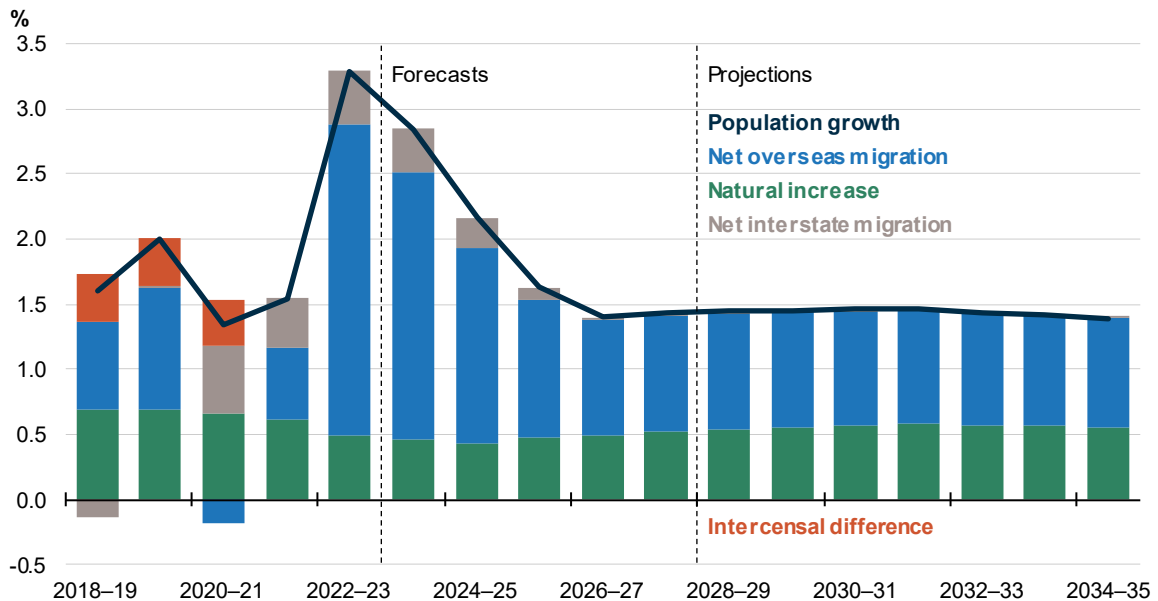
Source: ABS, *National, state and territory population, March 2024*; and Centre for Population.

Greater Perth's population is expected to be 2.4 million in 2023–24, representing 80 per cent of Western Australia's population. Population growth is forecast to fall to 3.1 per cent in 2023–24 and 2.4 per cent in 2024–25, declining to 1.6 per cent by 2034–35. Perth is projected to be the fastest growing capital city over most of the projection period, with growth mainly coming from NOM. Perth's population is projected to be 2.9 million in 2034–35.

The population of the **rest of Western Australia** is expected to be 582,000 in 2023–24. Population growth is forecast to fall from 1.7 per cent in 2023–24 to 1.2 per cent in 2024–25 as overseas and internal migration return to trend levels. As with many regions, NOM is projected to contribute the most to population growth. Unlike most rest-of-state areas, the rest of Western Australia is projected to experience net outflows of internal migrants from 2025–26. Natural increase is expected to contribute more to growth over the projection period than in most rest-of-state areas. The rest of Western Australia's population is projected to be 627,000 in 2034–35.

Chart 46. **POPULATION GROWTH IN WESTERN AUSTRALIA, GREATER PERTH AND THE REST OF WESTERN AUSTRALIA**
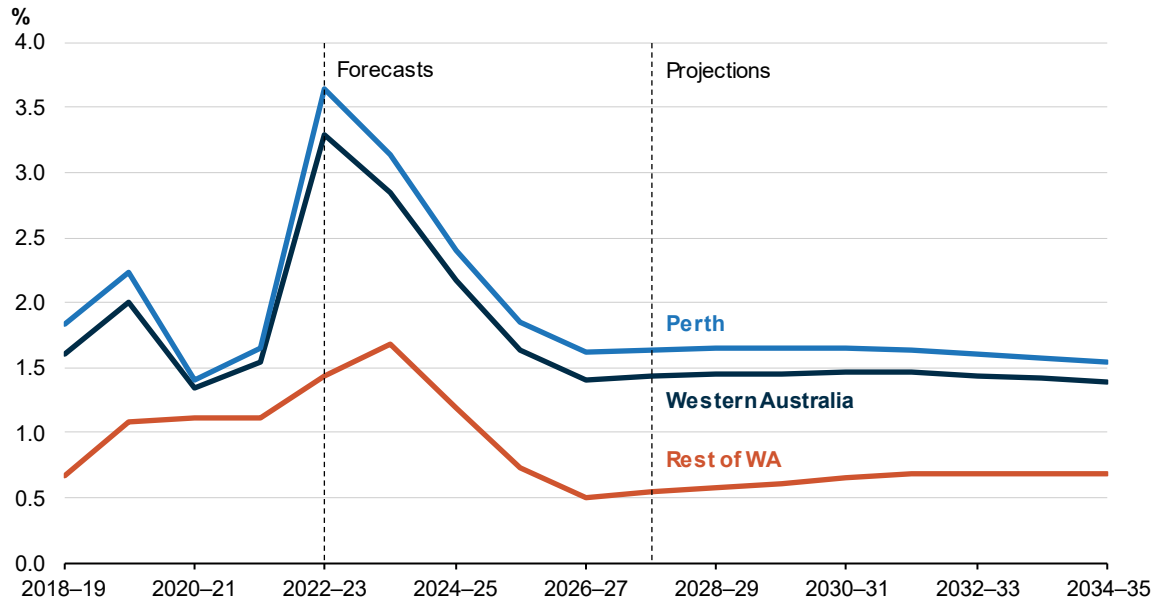
Source: ABS, *Regional population, 2022–23;* ABS, *National, state and territory population, March 2024*; and Centre for Population.

Table 8.   POPULATION PROJECTIONS, WESTERN AUSTRALIA

|	2022–23	2023–24	2024–25	2025–26	2026–27	2034–35
Population ('000)						
Western Australia	2,884	2,966	3,030	3,079	3,123	3,500
Greater Perth	2,309	2,384	2,441	2,486	2,526	2,873
Rest of Western Australia	572	582	589	593	596	627
Population growth (per cent)						
Western Australia	3.3	2.8	2.2	1.6	1.4	1.4
Greater Perth	3.6	3.1	2.4	1.8	1.6	1.6
Rest of Western Australia	1.4	1.7	1.2	0.7	0.5	0.7
Population growth ('000)						
Western Australia	91.9	82.0	64.3	49.4	43.1	48.1
Greater Perth	81.3	72.4	57.4	45.1	40.2	43.9
Rest of Western Australia	8.1	9.6	6.9	4.3	2.9	4.3
Natural increase ('000)						
Western Australia	13.7	13.2	12.9	14.2	15.3	18.9
Greater Perth	11.3	11.6	11.4	12.5	13.5	16.9
Rest of Western Australia	2.2	1.6	1.5	1.7	1.8	1.9
Net overseas migration ('000)						
Western Australia	66.6	59.1	44.5	32.2	27.3	29.0
Greater Perth	59.3	53.1	39.9	28.8	24.5	26.1
Rest of Western Australia	4.9	6.1	4.6	3.4	2.9	2.9
Net internal migration ('000)						
Western Australia	11.6	9.7	6.9	3.0	0.5	0.2
Greater Perth	10.7	7.8	6.1	3.7	2.2	0.8
Rest of Western Australia	1.0	1.9	0.8	-0.8	-1.7	-0.6
Median age (years)						
Western Australia	38.1	38.0	38.1	38.2	38.5	39.7
Greater Perth	37.6	37.4	37.5	37.6	37.8	38.9
Rest of Western Australia	40.4	40.5	40.7	41.1	41.5	43.6

Source: ABS, *National, state and territory population, March 2024;* ABS, *Regional population, 2022–23*; and Centre for Population.

2.7 TASMANIA

Tasmania's population is projected to increase from 576,000 in 2023–24 to 599,000 by 2034–35. Tasmania has been the slowest growing state since 2021–22 and this is expected to continue. Population growth is forecast to decline to 0.4 per cent in 2023–24 and 0.2 per cent in 2024–25 before recovering to 0.4 per cent growth from 2026–27.

Over the next forecast period, the decline and recovery in Tasmania's population growth is driven by overseas and interstate migration returning to their trend levels. Net interstate migration has been negative but is forecast to return to its trend of low positives from 2026–27. Tasmania has the lowest contribution from natural increase of any state and is projected to experience natural decrease from 2029–30, which would be the first time this has happened for a whole state since the 1930s. Despite having the smallest contribution to growth from NOM of any state, NOM is still expected to contribute almost all of Tasmania's population growth over the projection period.

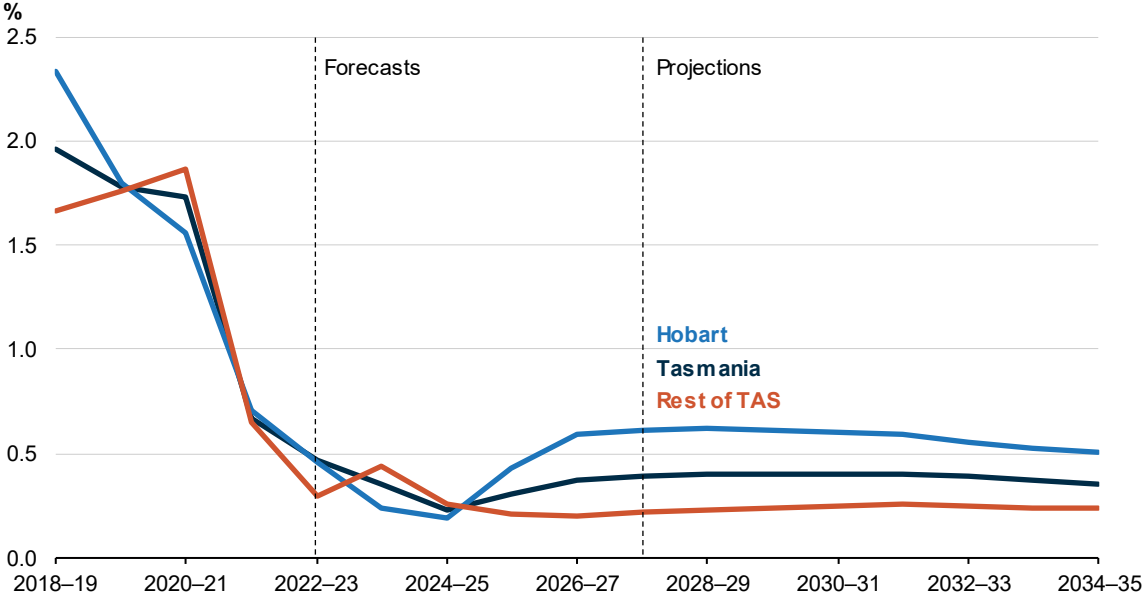**Chart 47.   POPULATION GROWTH IN TASMANIA**
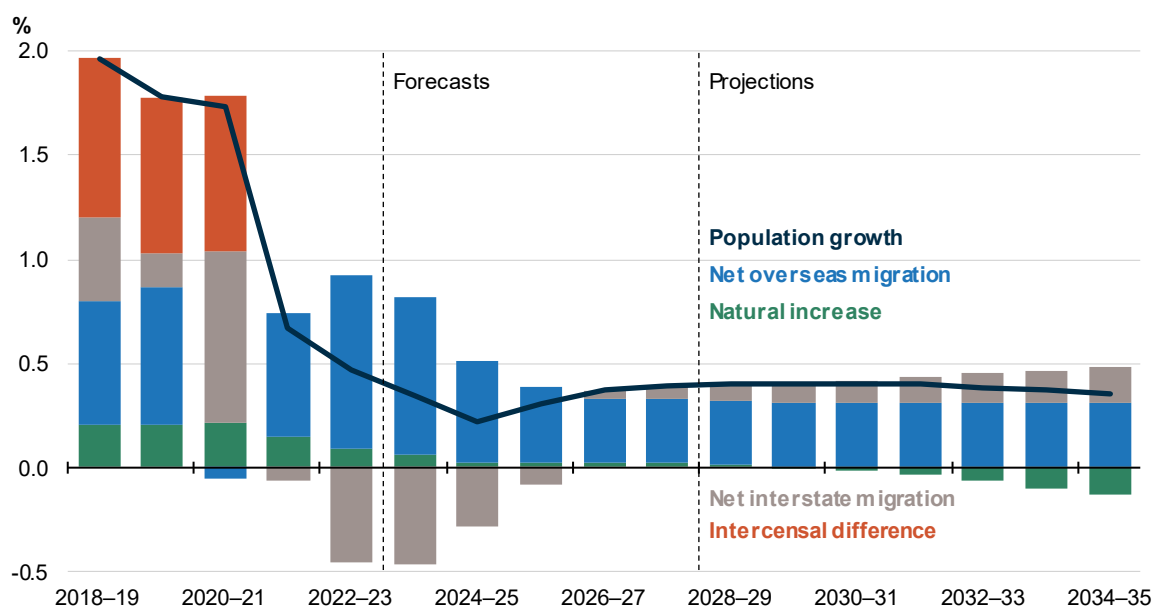
Source: ABS, *National, state and territory population, March 2024*; and Centre for Population.

Greater Hobart's population is expected to be 254,000 in 2023–24, representing 44 per cent of Tasmania's population. Population growth in Greater Hobart is forecast to decrease to 0.2 per cent in 2023–24 and 2024–25, the lowest of any capital city. Growth is projected to pick up as net internal migration recovers to its long-term trend, reaching 0.6 per cent in 2026–27. Growth is then projected to slow to 0.5 per cent by 2034–35. Most of the growth is expected to come from NOM, with natural increase and net internal migration expected to be slightly positive. Hobart's population is projected to be 270,000 in 2034–35.

The population of the **rest of Tasmania** is expected to be 321,000 in 2023–24, the largest rest-of-state population share at 56 per cent. Population growth is forecast to fall from 0.4 per cent in 2023–24 to 0.3 per cent in 2024–25 as NOM subsides. NOM is projected to contribute the overwhelming majority of population growth. Net internal migration is expected to contribute to growth from 2024–25, but this is more than offset by natural decrease which is projected to subtract 0.2 percentage points from growth by 2034–35. The rest of Tasmania's population is projected to be 330,000 in 2034–35.

Chart 48. POPULATION GROWTH IN TASMANIA, GREATER HOBART AND THE REST OF TASMANIA

Source: ABS, *Regional population, 2022–23*; ABS, *National, state and territory population, March 2024*; and Centre for Population.

Table 9.   POPULATION PROJECTIONS, TASMANIA

|	2022–23	2023–24	2024–25	2025–26	2026–27	2034–35
Population ('000)						
Tasmania	574	576	577	579	581	599
Greater Hobart	254	254	255	256	258	270
Rest of Tasmania	320	321	322	323	323	330
Population growth (per cent)						
Tasmania	0.5	0.3	0.2	0.3	0.4	0.4
Greater Hobart	0.5	0.2	0.2	0.4	0.6	0.5
Rest of Tasmania	0.3	0.4	0.3	0.2	0.2	0.2
Population growth ('000)						
Tasmania	2.7	2.0	1.3	1.8	2.1	2.1
Greater Hobart	1.2	0.6	0.5	1.1	1.5	1.3
Rest of Tasmania	0.9	1.4	0.8	0.7	0.6	0.8
Natural increase ('000)						
Tasmania	0.5	0.3	0.1	0.2	0.1	-0.8
Greater Hobart	0.3	0.6	0.5	0.5	0.5	0.0
Rest of Tasmania	-0.1	-0.3	-0.4	-0.4	-0.4	-0.8
Net overseas migration ('000)						
Tasmania	4.7	4.3	2.8	2.1	1.8	1.9
Greater Hobart	2.8	2.6	1.6	1.2	0.9	1.0
Rest of Tasmania	1.6	1.7	1.2	0.9	0.8	0.8
Net internal migration ('000)						
Tasmania	-2.6	-2.7	-1.7	-0.5	0.2	1.0
Greater Hobart	-2.0	-2.6	-1.7	-0.6	0.1	0.3
Rest of Tasmania	-0.6	0.0	0.0	0.1	0.2	0.7
Median age (years)						
Tasmania	41.9	42.2	42.6	43.0	43.4	46.3
Greater Hobart	38.9	39.3	39.8	40.3	40.8	44.2
Rest of Tasmania	44.8	45.0	45.2	45.6	45.9	48.4

Source: ABS, *National, state and territory population, March 2024;* ABS, *Regional population, 2022–23;* and Centre for Population.

The population of the Northern Territory is projected to increase from 255,000 in 2023–24 to 282,000 in 2034–35. Population growth is forecast to decline to 0.6 per cent in 2023–24, recovering to 0.7 per cent in 2024–25 and 1.0 per cent growth from 2027–28.

Natural increase – the main driver of population growth over most of the projection period – is expected to continue to add around 0.9 percentage points per year to the Northern Territory's population. The Northern Territory has the largest contribution to growth from natural increase, which reflects its higher fertility rates and younger population. As it moderates, NOM is expected to add around 0.6 percentage points to growth per year. The Northern Territory experienced net interstate migration outflows over the past 14 years, and this is projected to continue. Internal migration outflows are expected to increase in 2023–24 before moderating, detracting around 0.5 percentage points from growth from 2026–27.

Chart 49. **POPULATION GROWTH IN THE NORTHERN TERRITORY**
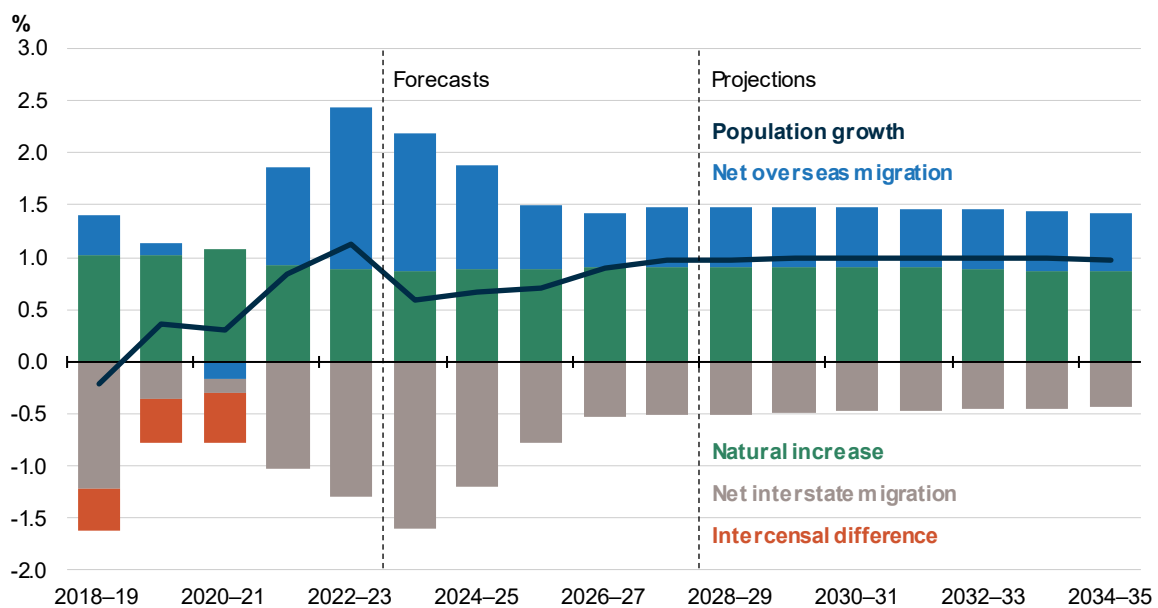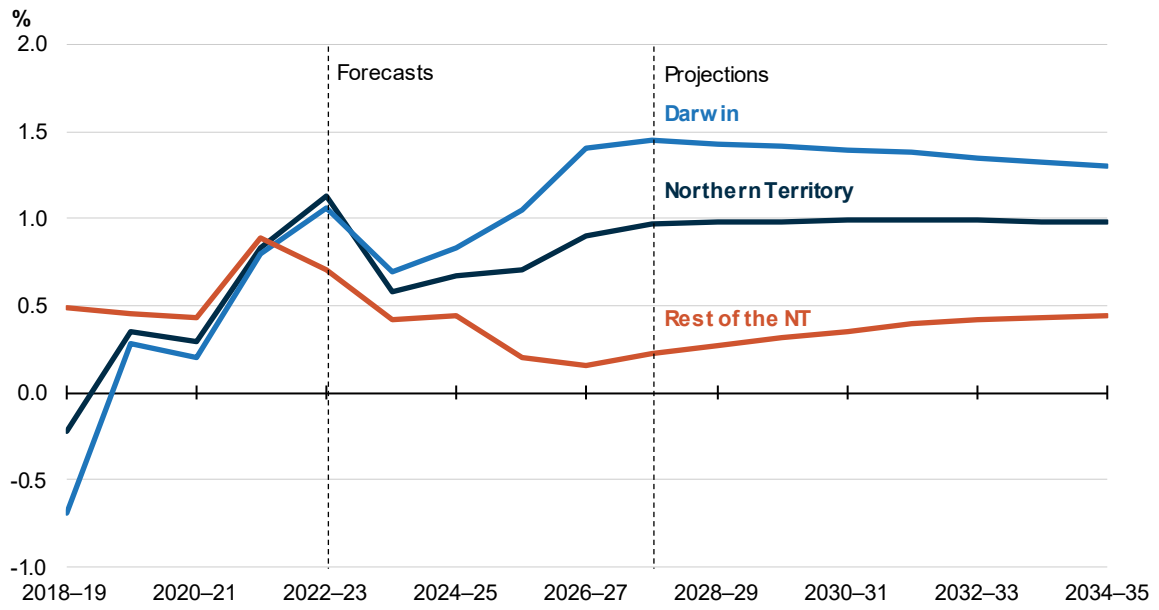

Source: ABS, *National, state and territory population, March 2024*, and Centre for Population.

Greater Darwin's population is expected to be 152,000 in 2023–24, representing 60 per cent of the Northern Territory's population. Population growth is forecast to decrease to 0.7 per cent in 2023–24 before rising to 0.8 per cent in 2024–25. Growth is expected to recover to 1.4 per cent in 2027–28 before declining to 1.3 per cent by 2034–35. As NOM subsides, natural increase is projected to return as Darwin's largest driver of growth – the highest contribution to growth from natural increase for any capital city. Growth from NOM has been mostly offset by interstate migration in recent years and this is projected to continue in the short term. Darwin's population is expected to be 175,000 in 2034–35.

The population of the **rest of the Northern Territory** is expected to be 102,000 in 2023–24. Population growth is forecast to decrease to 0.4 per cent in 2023–24 and 0.2 per cent in 2026–27, recovering to 0.4 per cent in 2034–35. Despite having the highest natural increase contribution of any rest-of-state area, the rest of the Northern Territory is projected to have the third slowest growing rest-of-state area over most of the projection period. This is because, unlike most rest-of-state areas that benefit from net internal migration, internal migration outflows will be a substantial drag on population growth. The rest of the Northern Territory's population is projected to be 106,000 in 2034–35.

Chart 50. POPULATION GROWTH IN THE NORTHERN TERRITORY, GREATER DARWIN AND THE REST OF NT

Source: ABS, *Regional population, 2022–23*; ABS, *National, state and territory population, March 2024*; and Centre for Population.

Table 10. POPULATION PROJECTIONS, NORTHERN TERRITORY

	2022–23	2023–24	2024–25	2025–26	2026–27	2034–35
Population ('000)						
Northern Territory	253	255	256	258	260	282
Greater Darwin	151	152	153	155	157	175
Rest of Northern Territory	102	102	103	103	103	106
Population growth (per cent)						
Northern Territory	1.1	0.6	0.7	0.7	0.9	1.0
Greater Darwin	1.1	0.7	0.8	1.1	1.4	1.3
Rest of Northern Territory	0.7	0.4	0.4	0.2	0.2	0.4
Population growth ('000)						
Northern Territory	2.8	1.5	1.7	1.8	2.3	2.7
Greater Darwin	1.6	1.0	1.3	1.6	2.2	2.3
Rest of Northern Territory	0.7	0.4	0.5	0.2	0.2	0.5
Natural increase ('000)						
Northern Territory	2.2	2.2	2.2	2.3	2.3	2.4
Greater Darwin	1.4	1.3	1.4	1.4	1.4	1.5
Rest of Northern Territory	0.8	0.9	0.9	0.9	0.9	0.9
Net overseas migration ('000)						
Northern Territory	3.9	3.3	2.5	1.6	1.4	1.6
Greater Darwin	2.6	2.6	1.9	1.2	1.0	1.2
Rest of Northern Territory	0.8	0.8	0.6	0.4	0.3	0.4
Net internal migration ('000)						
Northern Territory	-3.3	-4.1	-3.1	-2.0	-1.4	-1.2
Greater Darwin	-2.4	-2.8	-2.1	-1.0	-0.3	-0.5
Rest of Northern Territory	-0.9	-1.2	-1.0	-1.0	-1.1	-0.8
Median age (years)						
Northern Territory	33.7	34.0	34.2	34.5	34.7	36.0
Greater Darwin	34.6	34.8	35.1	35.4	35.6	36.8
Rest of Northern Territory	32.3	32.6	32.8	33.0	33.2	34.5

Source: ABS, *National, state and territory population, March 2024*; ABS, *Regional population, 2022–23;* and Centre for Population.
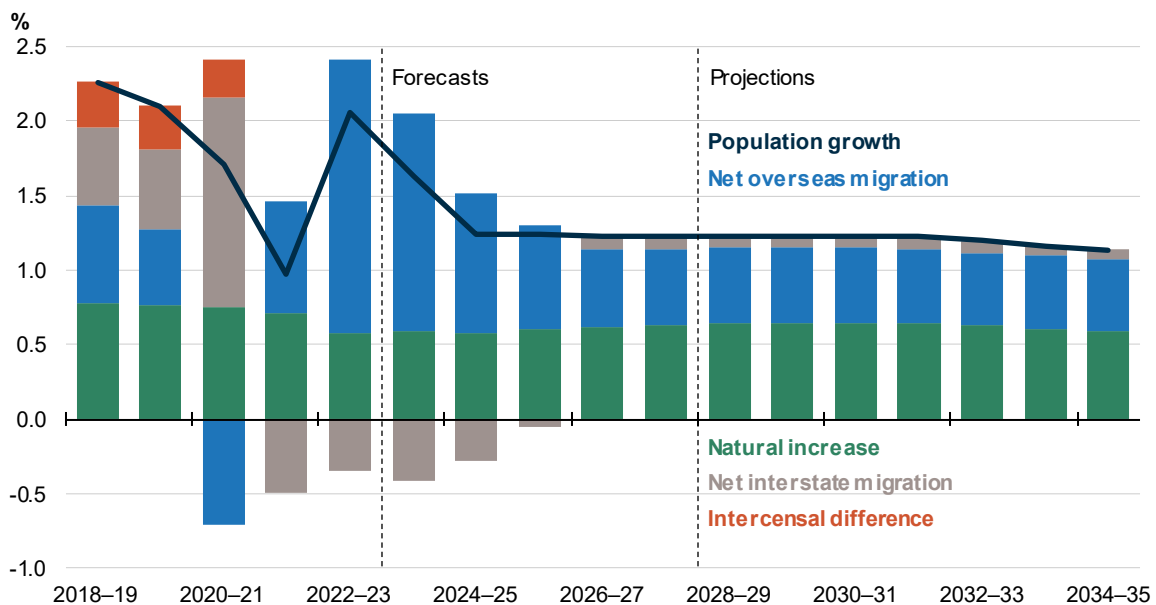
2.9 Australian Capital Territory

The population of the Australian Capital Territory is projected to increase from 474,000 in 2023–24 to 541,000 in 2034–35. The population growth rate is forecast to decline to 1.6 per cent in 2023–24, 1.2 per cent in 2026–27 and 1.1 per cent in 2034–35.

As NOM declines, natural increase is expected to become the main source of population growth in the Australian Capital Territory, reflecting the Territory's young age structure. Net interstate migration is expected to be an outflow of 2,000 in 2023–24, which would be the largest annual outflow in the Territory outside of the COVID-19 pandemic since 1998. Net interstate migration is forecast to return to its long-run trend of a small inflow of 400 in 2026–27 and remain around that level until 2034–35.

The ACT experienced large population revisions following the 2021 Census, likely due to challenges in measuring net interstate and overseas migration. To help reduce the size of future revisions, the ABS is implementing an intercensal review of net internal migration (Appendix – Box 12).

Chart 51.   POPULATION GROWTH IN THE AUSTRALIAN CAPITAL TERRITORY

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

Table 11.   POPULATION PROJECTIONS, AUSTRALIAN CAPITAL TERRITORY

	2022–23	2023–24	2024–25	2025–26	2026–27	2034–35
Population ('000)	466	474	480	486	492	541
Population growth (per cent)	2.1	1.6	1.2	1.2	1.2	1.1
Population growth ('000)	9.4	7.6	5.9	6.0	5.9	6.1
Natural increase ('000)	2.6	2.7	2.7	2.9	3.0	3.1
Net overseas migration ('000)	8.4	6.8	4.5	3.3	2.5	2.6
Net internal migration ('000)	-1.6	-2.0	-1.3	-0.3	0.4	0.4
Median age (years)	35.6	35.7	36.0	36.3	36.6	38.3

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

3. TECHNICAL APPENDIX

The Centre typically produces projections twice a year, for the Australian Government Budget and MYEFO. The 2024 Population Statement is consistent with the MYEFO 2024–25 projections, however MYEFO published the ABS estimate for net overseas migration in 2023–24.

Population projections for this Statement have been developed at the national, state, and Greater Capital City Statistical Area (GCCSA) classification. Projections used in the Statement can be found at population.gov.au.

The main data source for these projections is the ABS *National, state and territory population, March 2024*, released in September 2024. Population data after 2020–21 will be subject to revision until it is finalised following the 2026 Census. Components of population change, such as NOM, have differing revision schedules.

3.1 COMPONENTS

The Centre projects the future population using the 'cohort component' method. This involves developing forecasts, by single year of age and sex, of the components of population change – fertility, mortality and migration. These components are added to the population at the start of a financial year to calculate the population at the end of the financial year. This process is repeated until the end of the projection period.

For consistency across different geographic projections, components of population change at the national level constrain components at the state level which, in turn, constrain components of change at the national level.

3.1.1 NET OVERSEAS MIGRATION

The NOM forecasts begin with ABS estimates of quarterly overseas migrant arrivals and departures by visa group and by state. The ABS provides preliminary estimates of overseas migration 6 months after the reference period and final estimates a further 12 months later.

The Centre analyses ABS overseas arrivals and departures data as a leading indicator of NOM, and has built improved leading indicators from unit record data. The Centre also analyses other data as leading indicators of NOM, including data from the Department of Home Affairs on the number of temporary visa holders in Australia and offshore visa grants. The Centre accounts for Government policy and its expected future effect on overseas migration.

The long-run assumption of NOM is 235,000 per year, which is unchanged since the 2021 Intergenerational Report (IGR). This assumption means NOM contributes 0.7 percentage points to annual population growth over the 2023 IGR horizon, which is consistent with the average contribution over the 40 years prior to the 2023 IGR.

NOM projections from 2028–29 onwards have no visa breakdown. Further explanation of the long-run assumption can be found in the 2022 Population Statement.

Pre-pandemic average (2016–17 to 2018–19) age and sex profiles of migrant arrivals and departures, by visa and state, are assumed in forecasts up to 2027–28. Pre-pandemic age and sex profiles without a visa breakdown are assumed from 2028–29 onwards.

State-level overseas migration figures are derived as a share of the national total. Known historical state shares, disaggregated by migrant visa type and direction, inform the forecast shares. A smooth transition from recent state shares (June 2023 to March 2024 quarters) to pre-pandemic shares (2004–05 to 2017–18) is applied over the first 8 forecast quarters, after which pre-pandemic shares are applied. This methodology improves on the more judgement-based approach in the 2023 Population Statement.

GCCSA-level overseas migration figures are derived as a share of forecast state totals. The average GCCSA share of migrants over 2016–17 to 2018–19 inform forecast GCCSA shares, disaggregated by direction, age, and sex.

3.1.2 FERTILITY

The fertility forecasts are based on leading indicator data in the near term, before transitioning towards a long-run assumption.

The near-term fertility forecasts have been formulated using data on pregnancy scans as a leading indicator for the first time (Box 11). Births are first modelled based on the correlation with pregnancy scans, from which the total fertility rate and age-specific fertility rates are subsequently derived based on births and forecasts of the female population aged 15 to 49. This resulted in the total fertility rate forecast being revised down to 1.48 in 2023–24 and 1.45 in 2024–25, compared to 1.65 for both years in the 2023 Statement.

From 2025–26, fertility rates are expected to gradually recover. This assumes that shorter-term factors weighing on fertility will unwind slowly.

From 2031–32, the total fertility rate is projected to stabilise at 1.62 babies per woman in accordance with *A Projection of Australia's Future Fertility Rates.*[57] The expectation that fertility will rise to this long-run rate reflects that the proportion of women without children has not increased significantly in recent years and Australia has historically seen relatively strong fertility recuperation. Recuperation is when a cohort has more births at older ages to compensate for delayed childbearing at younger ages. The Centre has commissioned the ANU to undertake a review of the projected long-run rate.

The same approach has been used at the state level. At the capital city and rest-of-state level, the recent ratios of location-specific fertility rates to the state total fertility rate are assumed to remain constant. The fertility rates for these areas are also constrained to state fertility rates.

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57 McDonald P, *A Projection of Australia's Future Fertility Rates*, 2020.

BOX 11.   IMPROVING NEAR-TERM BIRTHS FORECASTS USING MEDICARE DATA

### FORECASTING PERFORMANCE SINCE COVID-19

Since the onset of the pandemic, the total fertility rate has been volatile. Lockdowns, cost-of-living and general uncertainty have affected the timing and number of births in recent years. Further, growth in the female population has varied widely, with the closure and reopening of national borders. Collectively, these factors resulted in an increase in the total fertility rate from 1.62 in 2019–20 to 1.69 in 2021–22, the so-called 'mini baby boom', before declining to a record low of 1.55 in 2022–23.

This has made forecasting births more challenging. Prior to this Statement, the Centre forecast near-term births by assuming single-year age-specific fertility rates (ASFRs) based on recent averages and applying these rates to the expected 15 to 49-year-old female population. However, the approach did not detect the near-term variability seen in recent years.

PREGNANCY ULTRASOUND SCAN DATA AS A LEADING INDICATOR OF BIRTHS

To improve near-term forecasting accuracy, the Centre has analysed Medicare data of pregnancy ultrasound scans to develop a short-term leading indicator of births. As most pregnant women undergo an ultrasound scan at 18 to 22 weeks of pregnancy, scan data leads births data by 4 to 6 months (Chart 52). The final design of the leading indicator is derived from a statistical model using a 4-month lag of the scan data, as well as lagged values of births.

Chart 52.   QUARTERLY BIRTHS AND MEDICARE PREGNANCY ULTRASOUND SCANS DATA
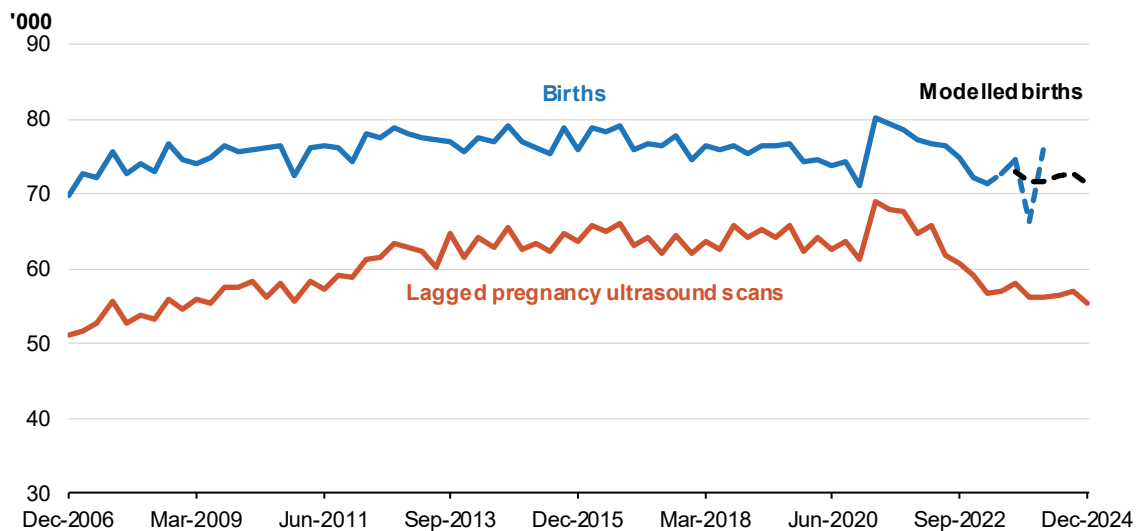
Note: Dashed births data is preliminary and subject to revision.
Source: ABS, *National, state and territory population, March 2024*; Services Australia, *Medicare Item Reports.*

continued over next page

MODELLING WITH THE LEADING INDICATOR IN PRACTICE

The leading indicator allows the Centre to better forecast births in the first 2 years of each forecast period. Testing this new modelling approach shows it would have performed better than the Centre's forecasts from recent population statements, especially in the first year (Chart 53). The model performs less well in the second forecast year as the scans data is not available to forecast 2 quarters of the year, although it is still an improvement. Pregnancy scans data is also available at the state level and works well as a leading indicator in this context.

Chart 53. **COMPARISON OF TESTS OF LEADING INDICATOR MODEL WITH PAST POPULATION STATEMENT BIRTH FORECASTS**
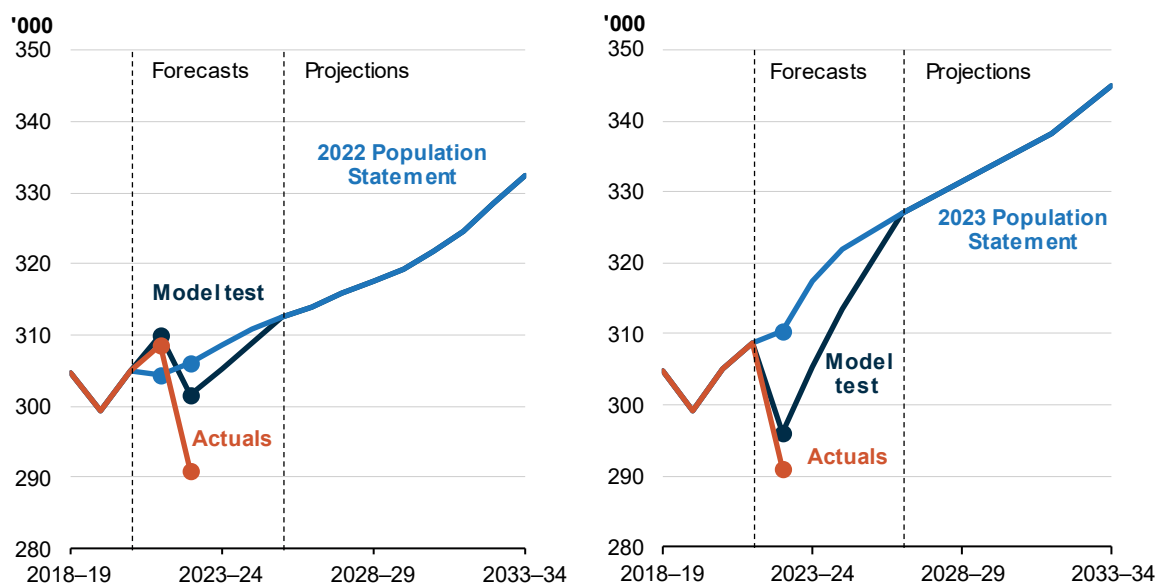
Note: Model tests forecast births for the first 2 years of each forecast period and figures beyond this point are interpolations to, and then mirror, the published forecasts. Dots represent years where actuals are available to compare to forecasts from model tests and population statements.

Source: *2022 Population Statement*; *2023 Population Statement*; and Centre for Population.

3.1.3 MORTALITY

Projected national mortality is based on the ABS's 2019–2021 national life table, adjusted for future improvement by applying mortality improvement factors from the Australian Government Actuary.[58] The adjusted 2019–2021 life table is used to represent the level of mortality that would be expected in the absence of the pandemic.[59]

The Australian Government Actuary's mortality projections are then adjusted to reflect the ongoing impacts of the COVID-19 pandemic. The mortality rate adjustments apply to those aged 50 and above, reflecting that excess mortality has been concentrated in these age groups. The Centre assumes mortality rates will gradually return from their 2022–23 peak to the pre-pandemic trend by 2028–29. In the 2023 Population Statement, mortality rates were assumed to return to the 'pre-pandemic' level in 2026–27 (Table 12).

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58 The *2022 Population Statement* Technical Appendix provides more information on mortality improvement factors.

59 The Australian Government Actuary's approach requires establishing a pre-pandemic baseline. Therefore, it did not use ABS 2020–2022 or 2021–23 life tables, as these years were affected by the COVID-19 pandemic.

The move to a more conservative mortality assumption was informed by recent mortality trends. In 2022 and 2023, a new COVID-19 wave was observed approximately every 6 months, with each wave resulting in around 10 to 15 per cent fewer deaths than the previous one. However, during 2024, COVID-19 deaths have not decreased as quickly as in previous waves. The 2024 winter wave was similar in size to 2023, indicating that future improvement in mortality may be more limited than previously expected.

Table 12. Excess mortality projections (above pre-pandemic trend)

%	2023–24	2024–25	2025–26	2026–27	2027–28	2028–29 onwards
2023 Population Statement	5	3	1	0	0	0
2024 Population Statement	5	4	3	2	1	0

Source: Centre for Population.

As the future of COVID-19 waves and variants is unclear, the long-term effect of COVID-19 on mortality remains highly uncertain. If excess mortality of one per cent continues in 2028–29 and beyond, it will result in an additional 11,700 deaths by 2034–35 and reduce life expectancy by 0.1 years, relative to the current forecast.

The same approach as above has been used at the state level. At the capital city and rest-of-state level, abridged life tables were constructed based on ABS deaths data and estimated resident population data from financial years 2003–04 to 2021–22. The approach for future capital city and rest-of-state mortality rates assumes that average ratios of capital city/rest-of-state to state mortality rates over 2017–18 to 2021–22 apply from 2026–27 onwards. For the period up to 2026–27, the ratios are smoothed from recent values to the 5-year average. Projected mortality rates for capital cities and rest-of-state areas are then calculated by multiplying projected state mortality rates prepared by the Australian Government Actuary by the historical ratios.

3.1.4   Net internal migration

Internal migration patterns vary year-to-year, driven by a variety of social and economic factors. While some patterns are well established (for example, outflows from Sydney, inflows to Queensland), most regions have experienced both net gains and net losses to internal migration at some time during the past 2 decades.

The forecast future patterns of net internal migration rely on both historical averages and recent data. Expected patterns of internal migration for 2023–24 are based on recent internal migration estimates and are then assumed to return to a long-term average by 2026–27.

The long-term average calculation uses 20 years of data, consisting of the 19 years to 2018–19 plus 2022–23. For capital cities and rest-of-state areas, the long-term average is 19 years because of data availability. The pandemic period is excluded from the averages because of disruptions to the data.

After 2026–27, NIM is the average of a fixed levels and a fixed rates assumption for each age and sex. A fixed levels assumption keeps the *number* of arrivals and departures constant for each jurisdiction, while a fixed rates assumption keeps the *rate* of arrivals and departures constant relative to the jurisdiction's population.

The composition of NIM – the age and sex distribution of people who move – is assumed to remain stable during the projection period. Young adults generally migrate to the capital cities and older Australians generally move out of the capital cities. Compositional assumptions are based upon the 2016 Census because the pandemic lockdowns significantly affected the 2021 Census movement data.

BOX 12. MEASURING INTERSTATE MIGRATION

There is no direct measure of interstate migration making it more difficult to measure than overseas migration or natural increase. Australian residents are not generally required to report to government agencies when they move. Instead, people update address details with government agencies when convenient, for example an address change is generally reported to the Australian Taxation Office (ATO) at tax time annually.

Between Censuses, the ABS relies on Medicare change of address data to estimate quarterly net interstate migration. To account for missing movements due to delayed updates and residents not eligible for Medicare, change of address data is scaled using expansion factors which are based on the most recent Census. However, expansion factors are not revisited between Censuses.

Rebasing the ABS's quarterly population estimates to the most recent 2021 Census saw larger-than-usual revisions at the state and territory level (Chart 54). This was especially true in Tasmania and the ACT which saw major upwards revisions to their populations. The ACT population underestimate was mostly due the estimates of NIM.

Chart 54. PRELIMINARY INTERCENSAL DIFFERENCE
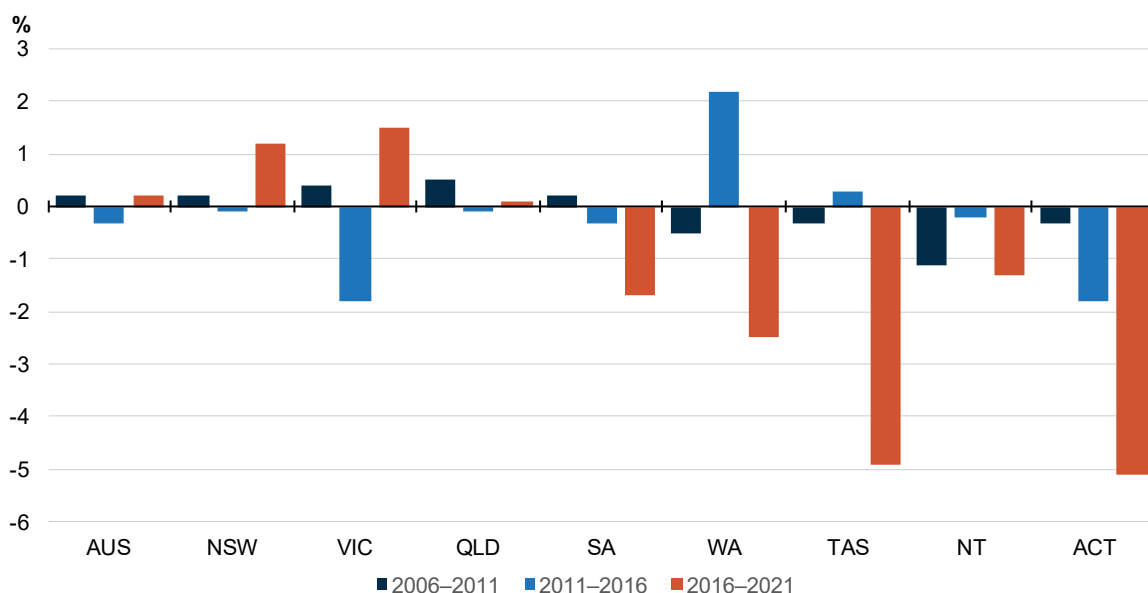
Note: The negative sign means that the 2016 Census-based population as at June 2021 was an underestimate when compared with the 2021 Census-based population.

Source: ABS, *National, state and territory population,* various releases following Censuses.

Rebasing the NIM estimates more frequently will allow less measurement error to accumulate between Censuses. To this end, the ABS is introducing a mid-point intercensal review. The review will use information from the Person-Level Integrated Data Asset, which captures address changes from ATO, Centrelink and Medicare data, to enhance estimation of quarterly NIM. Medicare will remain the primary input as the ABS assesses it to be the most suitable given its near universal coverage of the population.

This review would take the form of NIM revisions, something which has previously not been possible due to lack of suitable data. The results will be reflected in the population estimates released in June 2025.

Measuring forecast accuracy can provide insights into the drivers of population change and how to improve forecasting. Forecasts vary from observed outcomes for multiple reasons including trends progressing differently to assumptions, data limitations, behavioural changes, changes in government policy and data revisions.

3.2.1   NATIONAL PROJECTIONS

Previous population statements consistently underestimated post-pandemic growth rates (Chart 55). The forecast errors were particularly large for 2022–23 in the first 3 population statements, at 1.6 percentage points in the 2020 Statement, 1.3 percentage points in the 2021 Statement, and 1.1 percentage points in the 2022 Statement. Many other population projections prepared during and after the pandemic also underestimated population growth, as they did not anticipate the sharp recovery in NOM.

Chart 55.   ACTUAL AND FORECAST POPULATION GROWTH RATES, AUSTRALIA
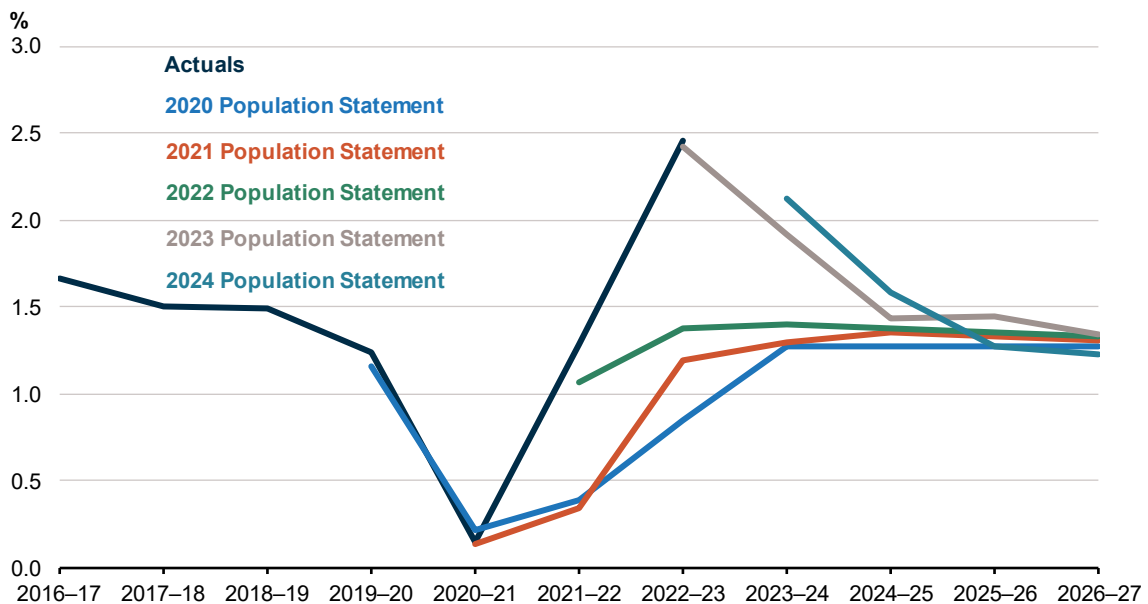
Source: ABS, *National, state and territory population, March 2024*; and Centre for Population.

In contrast, population projections developed prior to the COVID-19 pandemic generally overestimated the population, including the 2015 Intergenerational Report, the 2017 ABS projections, and the 2019–20 MYEFO (Table 13). These forecast errors reflect the impact of pandemic-related travel restrictions on NOM, as well as declining fertility rates.

Table 13.   DIFFERENCE (%) BETWEEN POPULATION PROJECTIONS AND OUTCOMES, AUSTRALIA, 30 JUNE

Projection	2015	2016	2017	2018	2019	2020	2021	2022	2023
Intergenerational Report, 2015	0.4	0.5	0.6	0.8	0.9	1.2	2.7	2.9	2.0
ABS projection series medium series (2017 base)	-	-	-	0.2	0.4	0.9	2.4	2.7	1.9
2019–20 MYEFO	-	-	-	-	0.2	0.6	2.2	2.6	1.8
Population Statement 2020	-	-	-	-	-	0.0	0.1	-0.8	-2.3
Intergenerational Report, 2021	-	-	-	-	-	-	0.2	-0.9	-2.5
Population Statement 2021	-	-	-	-	-	-	0.2	-0.8	-2.0
Population Statement 2022	-	-	-	-	-	-	-	-0.2	-1.3
Intergenerational Report, 2023	-	-	-	-	-	-	-	-	-0.5
ABS projection series medium series (2022 base)	-	-	-	-	-	-	-	-	-0.4
Population Statement 2023	-	-	-	-	-	-	-	-	0.0

Note: Positive numbers indicate an overestimation while negative numbers indicate an underestimation.

Source: ABS, *National, state and territory population, March 2024*; ABS, *Population Projections 2017 (base) – 2066*; ABS, *Population projections, 2022 (base) – 2071*; Commonwealth of Australia, *2015, 2021, 2023 Intergenerational Report;* Commonwealth of Australia, *MYEFO 2019–20;* and Centre for Population.

3.2.2   NET OVERSEAS MIGRATION

NOM has been the most volatile component of national population growth and the most difficult to forecast, especially given the disruption of overseas migration during the pandemic (Box 13). It has been the largest source of forecast error across population statements at the national level.

NOM was underestimated for 2021–22 and 2022–23 across the first 3 population statements, with more arrivals and fewer departures than expected. Forecast errors for 2022–23 were substantially greater for arrivals than departures in the first 3 statements, underestimating arrivals by 307,000 on average and overestimating departures by 59,000 on average. The 2023 Statement underestimated arrivals by 15,000 and overestimated departures by 14,000. Most of the error was concentrated in temporary migrant arrivals, including students, with relatively small misses in other categories (Chart 57).

BOX 13. IMPROVING NET OVERSEAS MIGRATION FORECASTING

Forecasting NOM is inherently difficult. Although the Government sets the number of permanent visas granted each year, many temporary visas are demand-driven. Demand can be affected by several factors, such as domestic and international economic conditions and migration policy settings in Australia and overseas. The uncertainty around NOM has been higher in recent years because of the significant disruptions to travel and migration trends during the early years of the COVID-19 pandemic. As a result, the data used to inform NOM forecasts became more volatile, which made it more difficult to ascertain trends. The lack of modern precedents similar to the COVID-19 pandemic also made it difficult to inform the judgements the Centre needed to make for its NOM forecasts.

The significant lags involved in publishing data contribute to the difficulties in forecasting NOM. Official ABS estimates of NOM cannot be finalised until 16 months after the reference period and are published 18 months after the reference period. This is because a person is only counted in NOM if they stay in Australia for 12 months or more over a 16-month period. Preliminary ABS estimates, which are published 6 months after the reference period, are based on traveller behaviour from an earlier period and revised each quarter until the final outcome is known. As the ABS faces similar challenges in understanding and predicting behaviour post-pandemic, some estimates in recent years have been subject to substantial revisions. New policy that changes travel behaviour and migration patterns may also result in more revisions to overseas migration estimates. As the ABS's preliminary estimates are modelled on previous traveller behaviour, they cannot immediately capture behavioural changes.

The NOM forecast contained in the 2023–24 Budget significantly underestimated the post-pandemic surge in NOM in 2022–23. The Centre's forecast for NOM was 400,000 but the most recent ABS estimate for 2022–23 was 537,000, which represents a 26 per cent forecast error. Like Australia, the UK and New Zealand substantially underestimated post-pandemic increases in NOM. In the UK, the March 2023 NOM forecast for the year ending 30 June 2023 was 311,000, or about 66 per cent lower than the latest estimate of 906,000 for that period.[60] In New Zealand, the 2023 Budget (May 2023) NOM forecast for the year ending 30 June 2023 was 63,000, approximately 42 per cent lower than the latest estimate of 108,000.[61]

The Centre for Population is making changes to improve its NOM forecasts. The Centre has been working with the Department of Home Affairs to make better use of administrative data and develop indicators of migration which are more stable than the traditional methods. This includes using:

- unit record data to better identify when an overseas arrival (border movement) is likely to be a new migrant arrival, as opposed to a migrant who is returning from a short-term overseas trip
- unit record data to link historical migrant arrivals to subsequent departures, a step towards developing a model which will link arrivals to departures and help predict when migrants will depart
- data on visa transitions to better understand the pathways migrants take while onshore
- differences in unemployment rates between Australia and New Zealand to better predict New Zealand citizen NOM.

The Centre has also started using Department of Education data on international student commencements and enrolments to help monitor the outlook for student migrants.

Throughout 2024, the Centre has consulted with experts in Australia and internationally, to investigate NOM modelling and forecasting techniques used by others. This includes consulting with experts in New Zealand, the UK and Canada about their own challenges in NOM forecasting post-pandemic, and how they are working to improve their forecasts. The Centre has also introduced a formalised peer review process with migration experts across government to promote better cross-government collaboration on NOM.
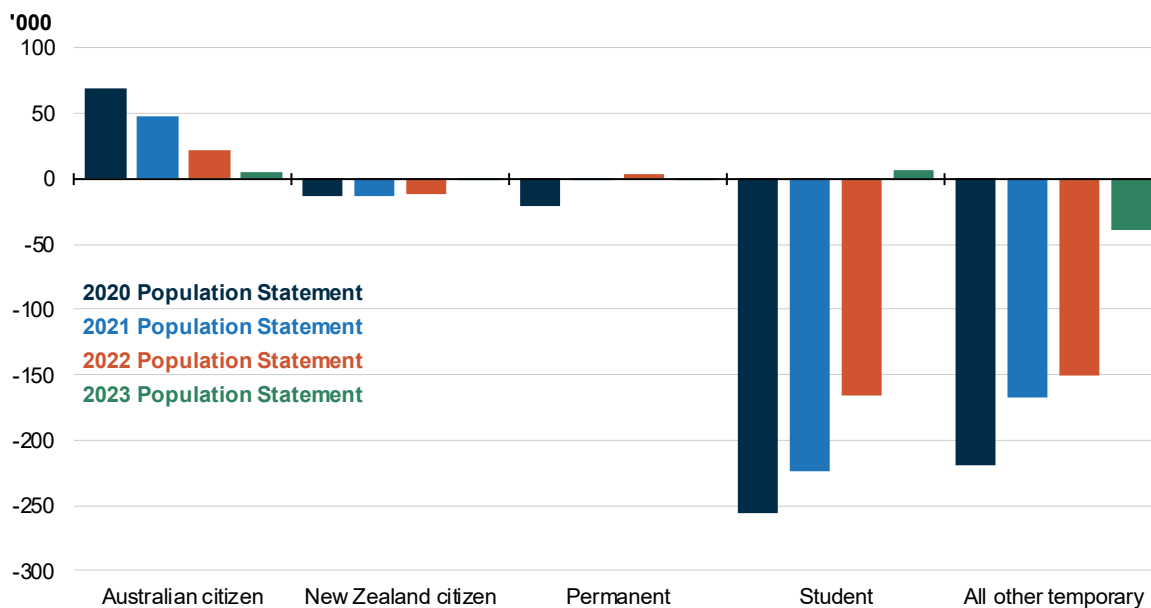
Chart 56.   DIFFERENCE BETWEEN NOM FORECAST AND OUTCOME
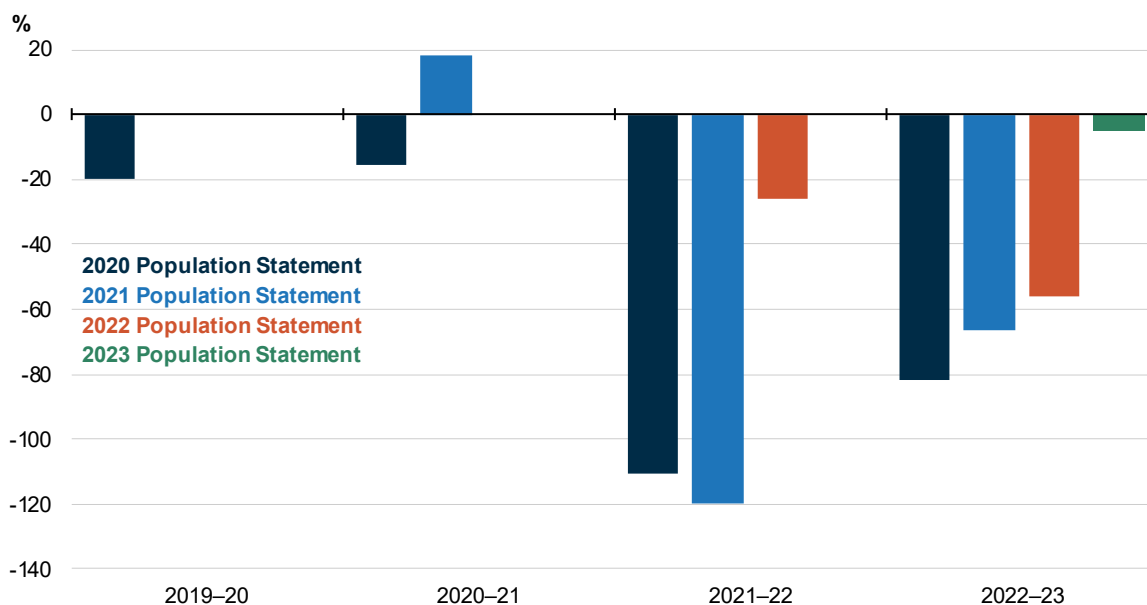
Note: Positive numbers indicate an overestimation while negative numbers indicate an underestimation.

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

Chart 57.   DIFFERENCE BETWEEN NOM FORECAST AND OUTCOME, BY VISA GROUP, **2022–23**

Note: Positive numbers indicate an overestimation while negative numbers indicate an underestimation.

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

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60 Office for National Statistics, *Long-term international migration, provisional: year ending June 2024*.

61 Stats NZ, *International migration: September 2024*.

3.2.3 NATURAL INCREASE

Although natural increase forecasts were accurate for most years, all 4 previous population statements overestimated natural increase in 2022–23, with fewer births and more deaths than expected (Chart 58).

All statements overestimated 2022–23 births by between 11,000 and 19,000, when fertility rates fell to a record low. As demonstrated in Box 11, adopting the fertility leading indicator would have largely avoided the forecast miss in the 2023 Population Statement and substantially reduced the miss in the 2022 Statement.

The first 3 population statements underestimated the number of deaths in 2022–23, when COVID-19's impact on mortality peaked (by 10,000, 11,000 and 4,000 respectively). This reflects the significant uncertainty about COVID-19, prior to the virus becoming widespread. The 2023 Statement slightly overestimated deaths (by 500), but this was based on three quarters of actual data and a full year of provisional data.

Chart 58. DIFFERENCE BETWEEN NATURAL INCREASE FORECAST AND OUTCOME
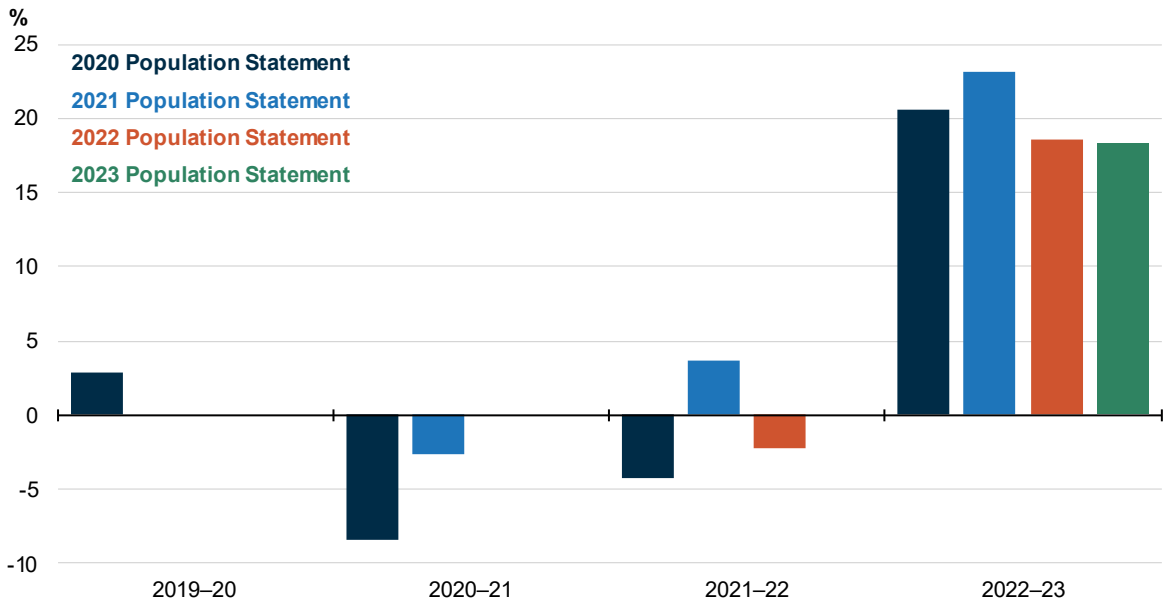
Source: ABS, *National, state and territory population, March 2024*; and Centre for Population.
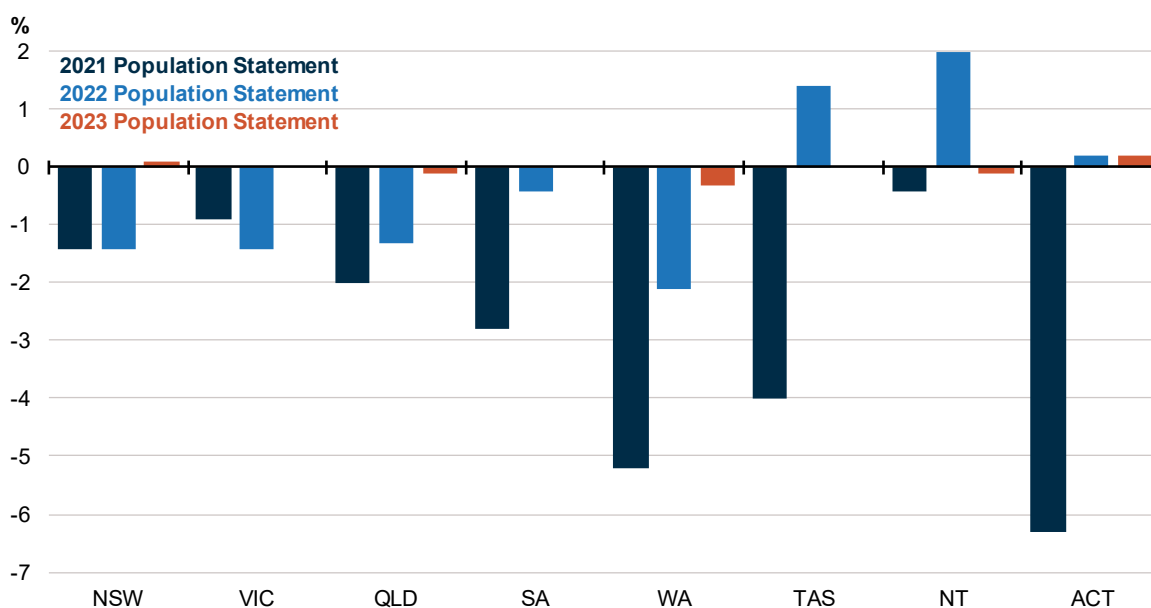
3.2.4   STATE AND TERRITORY PROJECTIONS

The past performance of the Centre's state and territory projections has been mixed (Chart 59). The population revisions resulting from the 2021 Census changed the base population estimates used in the 2021 Population Statement, which contributed to the large forecast errors for most states.

In the 2022 Population Statement, there were forecast errors around 1 to 2 per cent for most states and territories. The major drivers of these forecast errors were NIM and NOM.

The 2023 Population Statement forecasts for 2022–23 align better with the latest estimates, as forecasts were made with three quarters of actual data available.

Chart 59.   DIFFERENCE BETWEEN POPULATION FORECASTS AND OUTCOMES, BY STATE, 2022−23

Note: Positive numbers indicate an overestimation while negative numbers indicate an underestimation.
Source: ABS, *National, state and territory population, March 2024*; and Centre for Population.

STATE FORECAST COMPONENTS

Chart 60 shows the difference between the forecasts in the 2022 and 2023 Statement and the ABS actuals for each state and territory on 30 June 2023, broken down by components of growth.

Underestimating NOM was the dominant contributor to forecast error for both population statements. Western Australia had the largest forecast error in the 2022 Population Statement, with over 1.5 percentage points of forecast error due to NOM. The only state for which the 2022 Statement did not underestimate NOM by more than 0.5 percentage points was Tasmania.

Net interstate migration was the second largest source of forecast error. It was by far the biggest driver in the smaller states of Tasmania and the Northern Territory in the 2022 Statement and led to significant overestimates of population in those jurisdictions.

Births and deaths have been a relatively small source of forecast error, although the overestimation of births in the 2023 Statement contributed to significant population overestimates in New South Wales and the Australian Capital Territory. The forecast error due to births was smaller in the 2022 Statement for some of the larger states, because overestimates in 2022–23 were offset by underestimates in 2021–22.

For projections prior to the 2023 Population Statement, some of the forecast error is also due to subsequent ABS revisions to population outcomes following the 2021 Census. These errors were most prominent for the smaller states and territories in the 2022 Statement. The largest contribution was in the Northern Territory, making up 0.4 percentage points of total error, followed by the Australian Capital Territory at 0.2 percentage points and Tasmania at 0.1 percentage points.

Chart 60. CONTRIBUTION OF COMPONENTS TO GROWTH BY STATE, DIFFERENCE BETWEEN FORECASTS AND OUTCOME, 2022–23
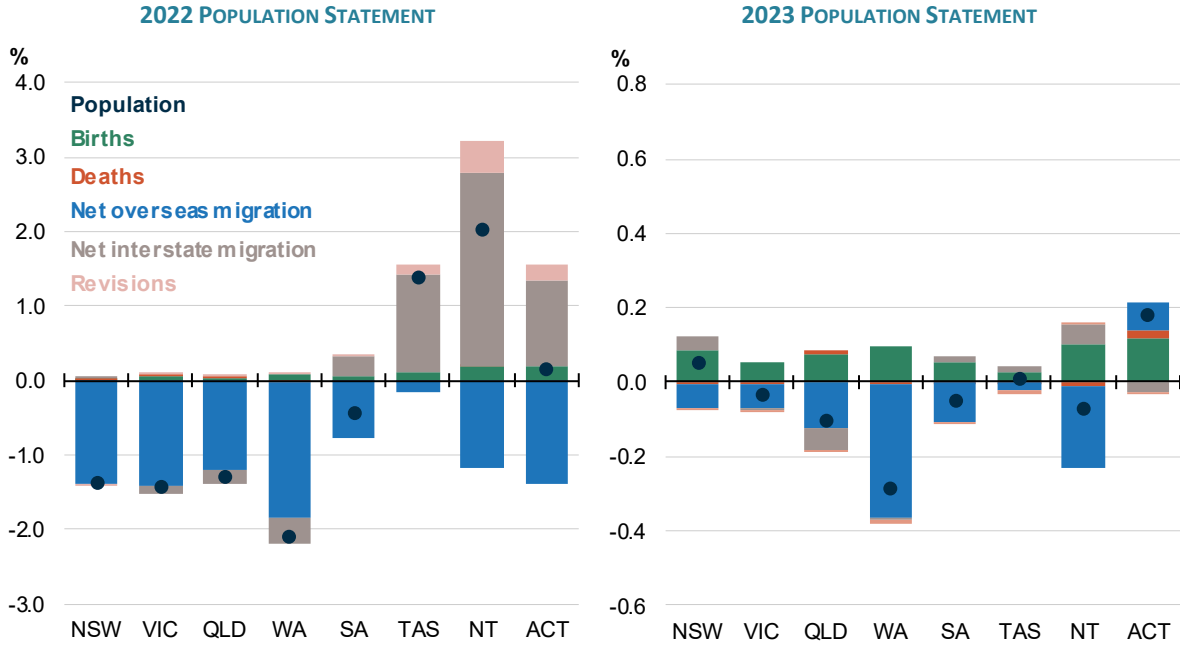
Note: Positive numbers indicate an overestimation while negative numbers indicate an underestimation.
Source: ABS, *National, state and territory population, March 2024;* and Centre for Population.

3.2.5   CAPITAL CITY AND REST-OF-STATE FORECASTS

Forecasts in the 2021 Statement underestimated the populations of capital cities and rest-of-state areas in 2022–23 (Chart 61). NOM was underestimated in all areas, especially capitals. ABS revisions to the population following the 2021 Census are also a significant driver of the forecast error outside of larger capital cities (where it offsets some of the NOM miss).

The 2022 Statement underestimated the populations of larger states, especially their capitals. This was because the larger capitals were disproportionately impacted by the underestimation of NOM. In smaller states, the underestimates of NOM were offset by overestimates of NIM, which led to population overestimates for rest-of-state areas.

The 2023 Statement was largely accurate in its first forecast year, with the largest proportional overestimate for Darwin (0.5 per cent) and the largest underestimate for rest of Northern Territory (0.4 per cent). While sub-state population data is not available quarterly, the GCCSA projections are benchmarked to the state-level projections, and so in aggregate they benefitted from the three quarters of available state-level data.

Chart 61. FORECASTS VS OUTCOMES, BY AGGREGATED CAPITAL CITIES AND REST OF STATES, 2022−23
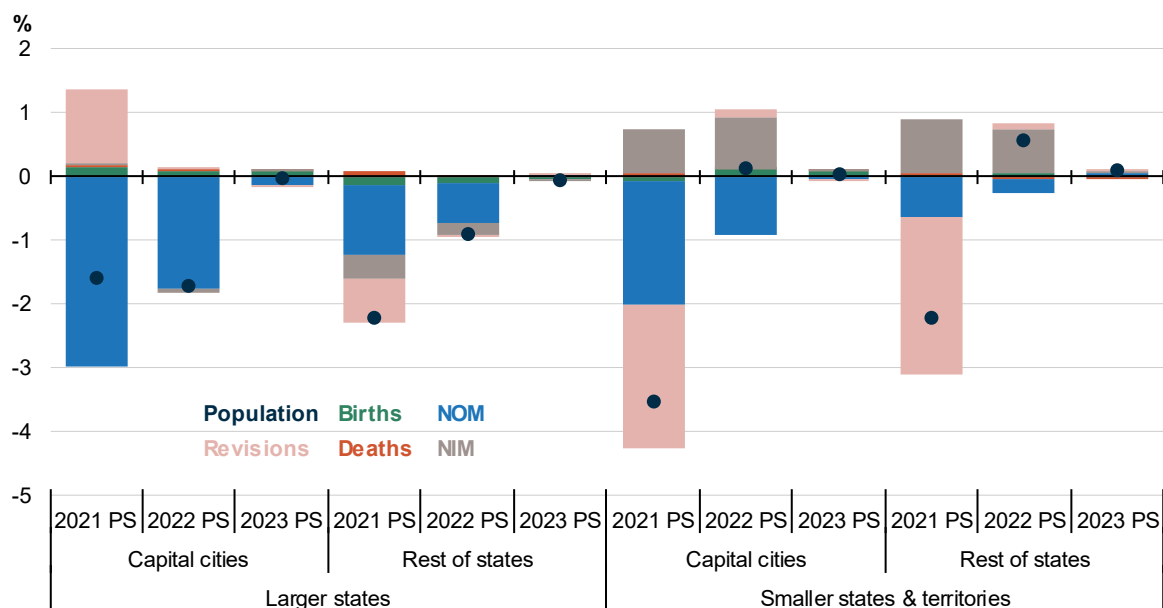
Note: Positive numbers indicate an overestimation while negative numbers indicate an underestimation. Larger states includes New South Wales, Victoria, Queensland and Western Australia. 'Revisions' reflects population rebasing by the ABS.

Source: ABS, *Regional population, 2022–23*; and Centre for Population.

BOX 14. UNDERSTANDING POPULATION BENCHMARKS IN ABS LABOUR FORCE SURVEYS

The ABS Labour Force Survey (LFS) uses population benchmarks to represent the civilian population aged 15 years and over. Since the LFS requires benchmarks that are 6 to 9 months ahead of the published population estimate, the ABS uses a population projection. Similar approaches are used for other releases, such as the ABS National Accounts.

These types of benchmarks have attracted attention over the past year as a possible leading indicator of population growth. However, these benchmarks should not be considered as a proxy for population data, nor should they be treated as a formal population forecast.

Population benchmarks are customised for use in a particular survey. They enable the survey to be coherent with an independent measure of the population. They also adjust for differential non-response to the monthly LFS survey, where some combinations of age and sex have greater non-response than others. This reduces standard errors and bias, and survey estimates are improved.

The projection is based on recently observed patterns of each population component. Data on assumed levels of births, deaths and internal migration are based on recent data and are held constant over the projection period. Projections of NOM use the following assumptions:

- first projected quarter – patterns and volumes from overseas arrivals and departures data used as a 'leading indicator' of NOM. The Centre uses the same data in its forecasting.
- second and third projected quarters – NOM from the first projection quarter, with no seasonal adjustment.

LFS population benchmarks estimates are updated quarterly, to reflect newly released and revised population data. There can be sizable revisions to LFS population benchmarks. For example, the benchmark for February 2023 was revised up by a cumulative 91,000 since the initial projection (Chart 62).

Chart 62. REVISIONS TO LFS PROJECTIONS OF CIVILIAN 15+ POPULATION
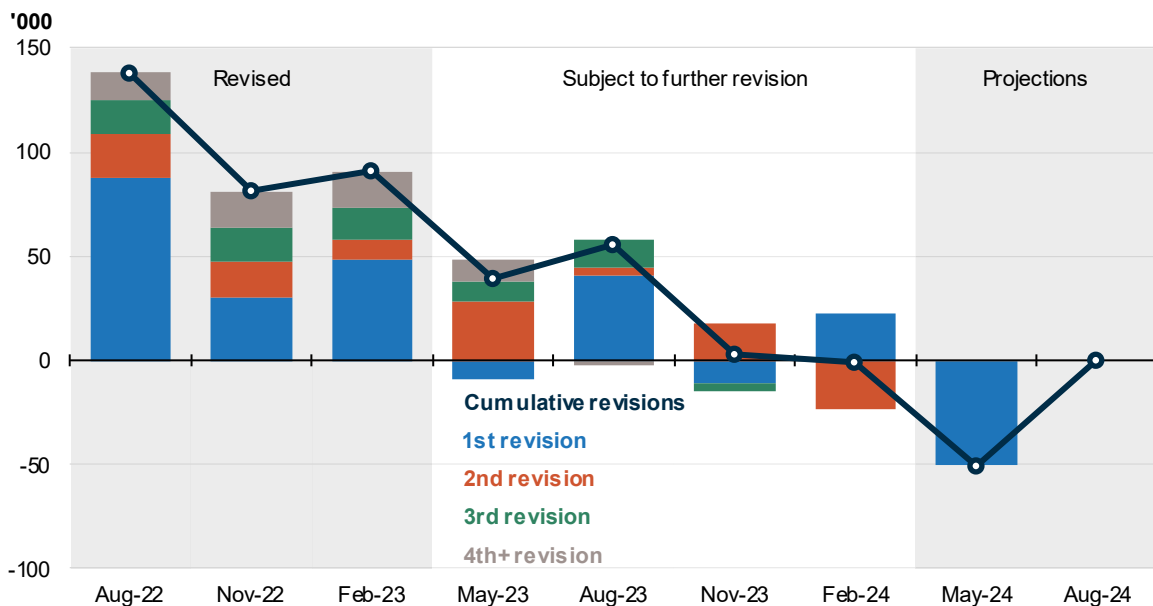
Source: ABS, *Labour Force, Australia*, various releases to October 2024.

GLOSSARY

Contribution to growth

How much a particular component contributes to the growth rate of the aggregate. Unless otherwise specified, it refers to the percentage point contribution.

For example, population growth was 1.7 per cent in 2018–19. The contribution to growth from NOM was 1.1 percentage points and the contribution to growth from natural increase was 0.6 percentage points.

Completed cohort fertility rate

A measure of the average number of children born to a cohort of women of the same age over their reproductive lifetime.

Excess mortality

The difference between the actual number, and the expected numbers, of deaths from all causes in a specific period. Expected deaths is the number of deaths that would be anticipated under 'normal' conditions (for example, in the absence of the COVID-19 pandemic). Excess mortality provides a measure of additional deaths above their normal or trend level. This could be due to: COVID-19, potentially misclassified or undiagnosed COVID-19 deaths, and other mortality that may be indirectly related to the pandemic (for example, relating to social isolation or changed access to health care).

Fertility desires

The total number of children a person intends on having *before* being confronted by economic, social or individual factors.[62]

Fertility intentions

The total number of children a person intends on having *after* being confronted by economic, social or individual factors.[63]

Greater Capital City Statistical Areas (GCCSA)

The socio-economic extent of the capital cities as defined by the ABS.[64]

Intercensal difference

The difference in the official population estimate based on the Census and the estimates derived from administrative data sources which cannot be attributed to a particular source.[65]

Internal migration

The movement of people across a specified boundary within Australia involving a change in place of usual residence. Net internal migration is the difference between arrivals and departures and can be either positive or negative.

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62 Gray et al., *Impacts of Policies on Fertility Rates*, 2022.

63 Gray et al*., Impacts of Policies on Fertility Rates*, 2022.

64 ABS, *Australian Statistical Geography Standard Edition 3*, 2021.

65 ABS, *Census of Population and Housing, 2021*.

Interstate migration

The movement of people over a state boundary involving a change in place of usual residence. Net interstate migration is the difference between arrivals and departures and can be either positive or negative.

Life expectancy (period)

A measure of how long a person would be expected to live if they experienced the age and sex-specific mortality rates from a single year. It represents the average number of years a person would live from a specific age. This differs from cohort life expectancy, which estimates how long a person would live if they experienced projected age and sex-specific mortality rates across their lifetime. In this population statement, 'life expectancy' refers to the period life expectancy at birth.

Overseas migrant arrival

An incoming international traveller who stays in Australia for 12 months or more over a 16-month period, who is not currently counted within the population, and is then added to the population.

Overseas migrant departure

An outgoing international traveller who leaves Australia for 12 months or more over a 16-month period, who is currently counted within the population, and is then subtracted from the population.

Overseas migrant – permanent ('permanent migrant')

A non-citizen who holds an Australian permanent visa and usually resides in Australia (refer to definition of 'net overseas migration'). Generally, permanent residents can live, work and study with fewer restrictions than temporary visa holders in Australia.

Overseas migrant – temporary ('temporary migrant')

A non-citizen who holds a temporary visa that grants authority for travel to and from Australia within a specific period for a specific purpose (such as work or study) and usually resides in Australia (refer to definition of 'net overseas migration'). Temporary visa holders may have other conditions tied to their stay in Australia. Not all temporary visa holders are considered residents as they may not meet the 'usually resident in Australia' criterion.

Natural increase

The population change resulting from the number of births minus the number of deaths over a given period of time.

Net overseas migration (NOM)

The net gain or loss of population through immigration to, and emigration from, Australia. It is measured as the difference between the number of migrant arrivals and the number of migrant departures. This includes individuals on both permanent and temporary visas, as well as returning and departing Australian citizens.

Population

The official measure of Australia's population based on the concept of usual residence – known as estimated resident population. It refers to all people, regardless of nationality or citizenship, who usually live in Australia, except foreign diplomatic personnel and their families. It includes usual residents who are overseas for less than 12 months. It excludes overseas visitors who are in Australia for less than 12 months (refer to definition of 'net overseas migration').[66]

Population momentum

Population momentum refers to the effect that the age structure of the current population has on its future size and composition. Population momentum can add to, or subtract from, population growth. For example, regardless of the total fertility rate, a younger age structure contributes to faster population growth, as it will mean more births and fewer deaths.

Recuperation

Recuperation refers to an increase in births at older ages that compensates for a delay in childbearing at younger ages.

Replacement rate

The number of babies a woman would need to have over her reproductive lifespan to replace herself and her partner. Given not all babies survive to reproductive age and are slightly more likely to be male, replacement fertility is around 2.1 babies per woman in advanced economies.

Rest-of-state area

The area within each state that is not defined as being part of the Greater Capital City.[67]

Total fertility rate

An estimate of the number of children a woman would have during her lifetime if she experienced the age-specific fertility rates for a given year at each age of her reproductive life.

With-migration replacement total fertility rate

A measure of the total fertility rate that, in combination with projected levels of NOM and life expectancy, would be consistent with zero long-run population growth.

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66 ABS, *National, state and territory population methodology, March 2023*.

67 ABS, *Australian Statistical Geography Standard Edition 3*, 2021.

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