



Agenda Report for Noting

Meeting Date: 5 February 2026

Item Name	Population growth and projections – January 2026	
Presenters	Chris Rudd and Jo-Anne Ragless	
Purpose of Report	Noting	
Item Number	6.1	
Strategic Plan Reference	N/A	
Work Plan Reference	N/A	
Confidentiality	Not Confidential (Release Immediately)	
Related Decisions	19 th June 2025, Item 6.1, Population growth and projections recommended that the Commission resolves to: <ul style="list-style-type: none">• Note the recent population change in South Australia and the comparison with projected growth.• Note the risks to future population growth associated with each of the population growth components.• Note the impact of new GARP growth areas on published local area population projections.• Note the commencement of a population projections review in June 2025.	
Conflicts Declared	Nil	
Is the Report author aware of any potential undeclared conflict?		NO

Recommendations

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

1. Note the latest population data for the year to June 2025 (released 18th December 2025) and the continuation of steady growth over this period.
2. Note the recently released 2025 National Population Statement by the Centre for Population (CPOP) and its analysis of demographic trends, and population growth projections for Australia and South Australia.
3. Note the comparison of the latest CPOP population growth projection with the South Australian government high and medium growth projections.
4. Note the requests for updated population projections from various agencies including SA Health, SA Water, the Department of Infrastructure and Transport (DIT), and the Aboriginal Health Council of South Australia.

5. Consider the proposed timeline to prepare updated population projections for South Australia and its regions.

Background

At the Commission meeting on 19 June 2025, a report titled “Population Growth and Projections – June 2025” (Item 6.1) was presented which addressed the following population related matters:

- Recent population change in South Australia and the comparison with projected growth.
- Risks to future population growth associated with each of the population growth components (overseas and interstate migration, and births).
- Impact of new GARP growth areas on published local area population projections.
- Commencement of a population projections review in June 2025.

One of the key messages from this report was that meeting our high growth population projection will become more challenging in the future due to; lower than expected birth (fertility) rates, ongoing net interstate population losses and a reduced amount of overseas migration.

Since 19 June 2025 Commission report, more contemporary data and analysis has become available which better informs some of the previously discussed demographic matters:

- On December 18, 2025, the ABS released population estimates for the June quarter 2025. These estimates show that population growth in South Australia has stabilised over the past 12 months after a period of decline following the COVID peak. Our annual growth is currently holding at just over 1%, and the national growth rate is currently 1.5%.
- On January 9, 2026, the Centre for Population (CPOP) released its 2025 Population Statement which forecasts a slowing in the national population growth rate over the next decade, with South Australia expected to be the “second lowest growing state”.
- The Centre for Population prepares updated projections each year and their latest projection for South Australia indicates a decline in the population growth rate from 1.1% to 0.6%, over the next decade (to 2036). This projection is well below the published South Australian government high series projection and is also below our medium projection.
- The Population Statement also provides in-depth analysis of the key demographic challenges facing Australia:
 - Overseas migration by visa type and status
 - Births and fertility trends for Australia, and internationally
 - Mortality and life expectancy
 - Population ageing and dependency ratios

Over the past 6 months we have also received ongoing enquiries about the status of the South Australian government population projections (published August 2023), and when they will be updated. Agencies such as the Department for Health, Department for Infrastructure and Transport, and SAWater all use local area population projections in their strategic infrastructure and service delivery planning models.

In addition to the agency requests, we have also received a letter from the Chief Executive Officer (CEO) of the Aboriginal Health Council of South Australia requesting that we consider developing projections of the Aboriginal people. The request is driven by the fact that current projections for South Australia and its regions are prepared using aggregate demographic data at the State and regional level and have not been disaggregated for the Aboriginal population.

The Aboriginal population does have different demographic characteristics (higher rates of fertility, paternity rates and lower life expectancy) and our current growth projections do not capture this.

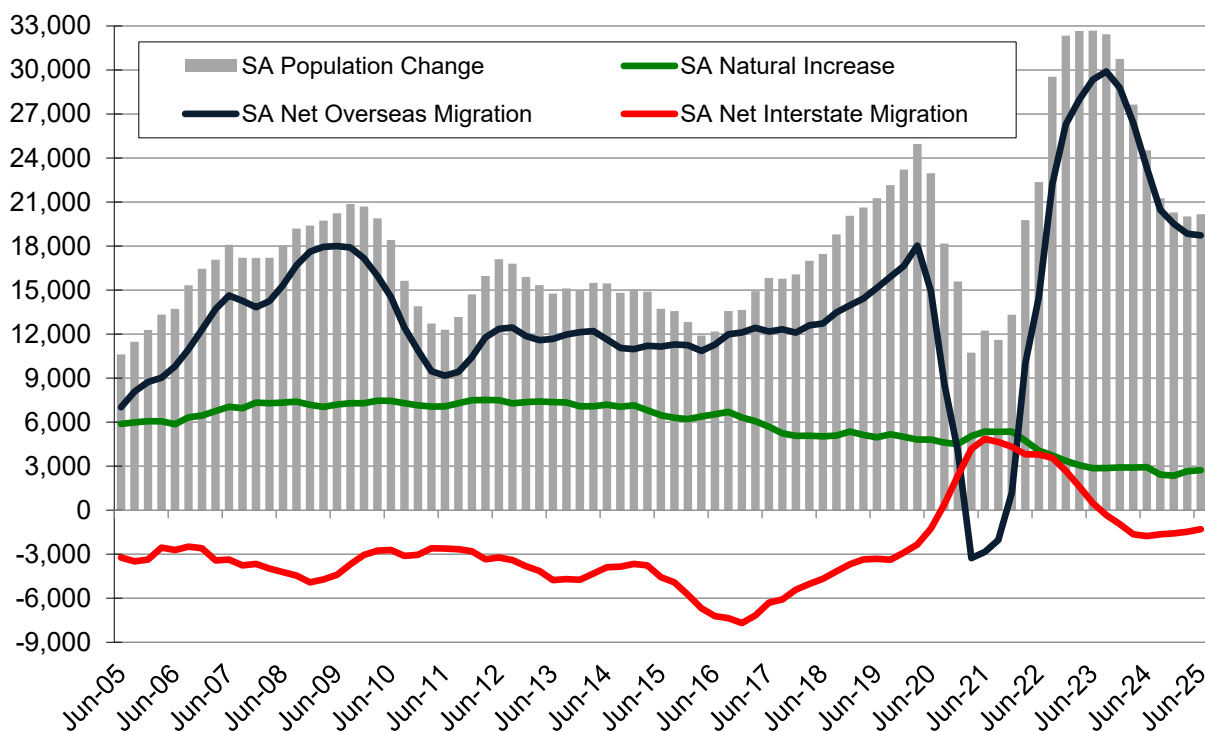
Discussion

Recent population change

The latest ABS population estimates for the 12 months to June 2025 show that:

- South Australia’s population increased by around 20,167 persons to reach 1.902 million.
- Annual population growth has now returned to around the pre-COVID level of 1.1% per annum. At this growth rate our population should reach 2 million by 2030.
- Net Overseas migration (NOM) was 18,735 persons, accounting for over 90% of our population growth.
- Net Interstate Migration (NIM) saw a relatively small loss of only 1300 persons.
- Natural Increase continued its steady decline to reach 2730 over the period.
- The fertility rate in South Australia has now dropped to 1.46 births per woman which is well below the population replacement rate of 2.1. It was 1.66 in 2021.

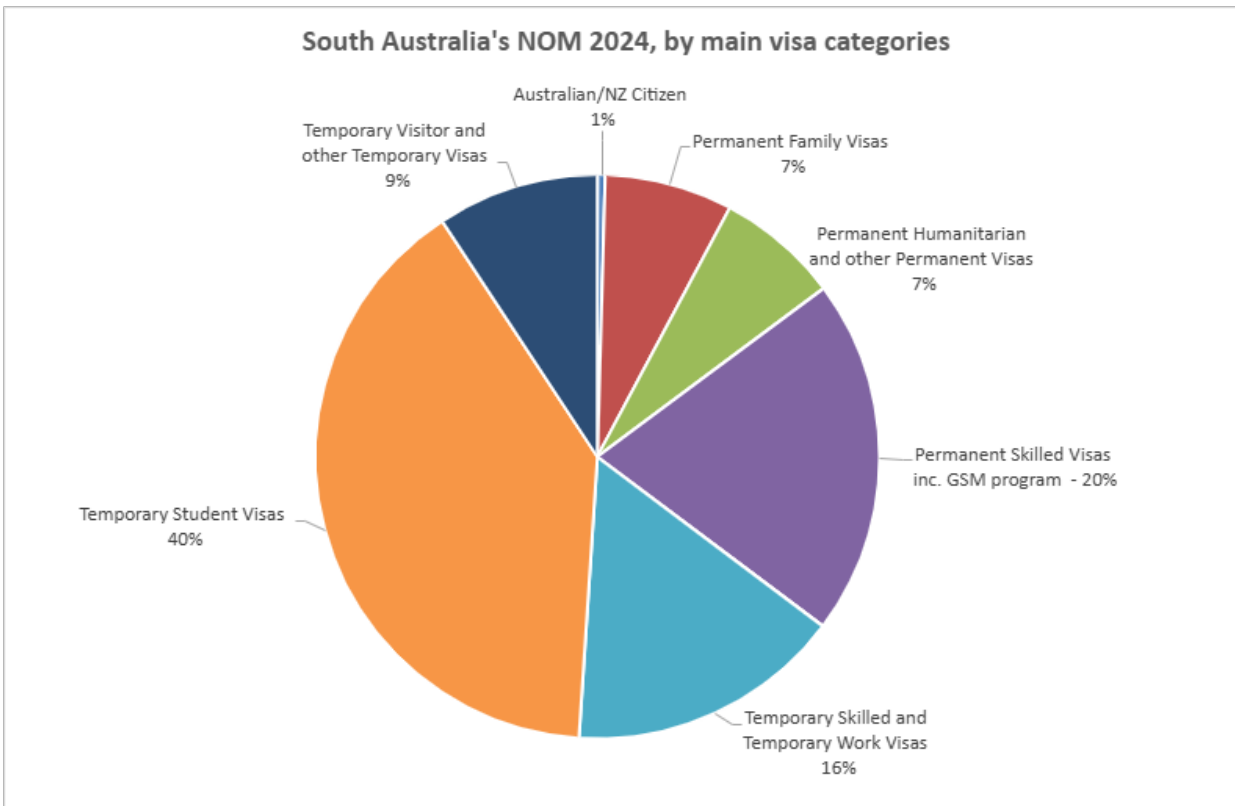
The following chart shows actual population change over the past 20 years and clearly demonstrates the impact of the COVID-19 pandemic, and the recent return to a more stable growth pattern.



Overseas migration by visa status

While the volume of NOM is a key population metric as reported above, the composition of NOM is equally as important. The chart below demonstrates that South Australia’s annual NOM is primarily composed of temporary students, visitor and skilled worker visas (65%). The main fields of study for the students are commerce, engineering, ICT, health, and hospitality.

The permanent skilled migrant component of NOM, which includes state nominated General Skilled Migration visa holders, is relatively small at 20 per cent in 2024. Permanent family and humanitarian visas account for around 14%.



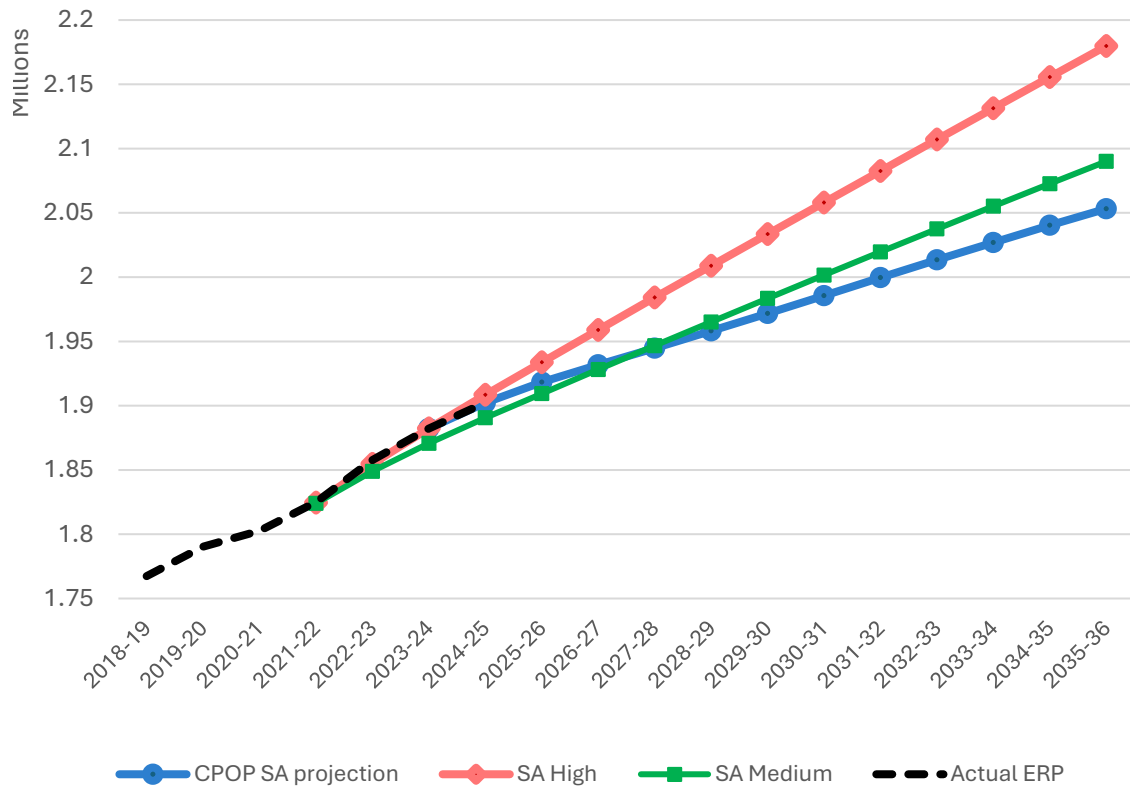
2025 National Population Statement

On 9th January 2026, the Centre for Population (CPOP) released its 2025 Population Statement which forecasts a slowing in the national population growth rate over the next decade, with South Australia expected to be the “second lowest growing state”.

Attachment 1 is a briefing prepared for the Minister about the 2025 National Population Statement growth projection and its key assumptions.

The following chart compares the SA government high and medium growth projections with the latest CPOP projection. It also shows actual ABS population data from 2018-25 and demonstrates that our current growth trajectory is trending just under the SA high growth scenario.

Interestingly, the CPOP projection drops below our medium series projection by 2028, and by 2036 the difference between the CPOP projection and the SA medium series projection is around 36,000 people. For the high series, the difference is around 125,000 people.



The significant divergence of the CPOP projection from the South Australian government projections over a relatively short time (10 years) is caused by different assumptions about population growth components (see below).

Summary of population growth component assumptions

Components	CPOP	SA High series	SA Medium series
NOM 2025	18,400	17,500	15,000
NOM 2036	14,100	16,500	14,500
NIM 2025	-1500	1500	-500
NIM 2036	-3500	1000	-1000
Birth rate (TFR) 2025	1.42	1.75	1.62
Birth rate (TFR) 2036	1.62	1.75	1.62

The key differences between the component assumptions and their impact on total population growth are:

- Net Overseas Migration – CPOP assumes NOM reducing to 14,100 by 2036 whereas our high scenario is around 16,500. Over 10 years this amount to a difference of 24,000 people, over 30 years this difference will be around 75,000.
- Net Interstate Migration – CPOP assumes annual NIM losses of around 3,500 by 2036 whereas our projections are more optimistic with a NIM level between +1000 (high) and -1000 (medium).

The difference between our high assumption (+1000) and CPOP (-3500) is 4500. Over 10 years this amount to 45,000 people and over 30 years it's approaching almost 150,000 people.

- Total Fertility Rates – CPOP uses 1.42 in 2025 increasing to 1.62 by 2036. Our high growth fertility assumption is 1.75, and the medium is set at 1.62. Our high scenario fertility rate of 1.75 is currently well in excess of the CPOP assumptions.

Population projections

The South Australian government develops population projections to provide a common set of planning assumptions for infrastructure and service planning. Projections show the potential size and distribution of the future population and provide vital information about the future age structure of the population.

The latest projections (released in 2023) are based on the results from the 2021 Census, and assumptions developed at that time about the components of growth (overseas migration, interstate migration, and natural increase). They are presented as high, medium, and low growth scenarios over a 30-year period to 2051. In the past, the South Australian government has adopted a 'set and forget' approach to projections with an update occurring once every five years following a census.

The next population census takes place on August 11, 2026, and the results will be released in three stages starting June 2027 (most of the core demographic data we need to prepare the projections will be available from June 2027). Given the ABS data release timeframe, the earliest we could expect to release a revised set of population projections for South Australia would be late 2027.

In the interim it is recommended that we commence detailed investigations into the population growth components (overseas migration, interstate migration, births and deaths) and develop revised assumptions and growth scenarios. This work can commence from mid-2026 so that we are ready to go once the ABS census data is released.

Given the amount of time between 2026 census and the data release, we can also consider the request from the CEO of the Aboriginal Health Council of South Australia about developing projections of the Aboriginal people.

Attachments:

1. 2025 National Population Statement and South Australian government projections (#24180837)

Prepared by: Chris Rudd

Endorsed by: Joe Noone

Date: 22 January 2026



20 January 2026

2025 National Population Statement and South Australian government projections.

The Centre for Population (CPOP) has released its 2025 Population Statement which forecasts a slowing in the national population growth rate over the next decade, with South Australia expected to be the “second lowest growing state”.

Overview

The latest CPOP projection for South Australia indicates a decline in the population growth rate from 1.1% to 0.6%, over the next decade. This projection is well below the published South Australian government high series projection and, is also below our medium projection.

The following report reviews the latest CPOP projections and assumptions and compares these to our latest published population projections.

A complete review of South Australia’s population projections will commence later in 2026 following the release of preliminary data from the August 2026 census of population and housing.

2025 Population Statement

The statement released on 9th January 2026 reports that:

- Australia’s overall population growth rate has slowed over the past year and is now expected be around 1.3 per cent in 2025/26.
- Net Overseas Migration (NOM) decreased to 306,000 in 2024/25, which is well below the peak of 556,000 in the year to September quarter 2023. The decrease in NOM is



being driven by fewer temporary migrant arrivals (particularly students and visitor visas).

- In 2025/26, NOM is projected to be around 260,000.
- Declining fertility rates in Australia are contributing to slower population growth. In 2025/26 the fertility rate is projected to fall to around 1.42, well below the replacement rate of 2.1.
- Australia continues to have one of the highest life expectancies in the world. By 2035/36 life expectancy for women is around 87.1 and 83.4 years for men.
- As a result of lower fertility and higher life expectancy our population continues to age. By 2036, the median age is projected to increase by almost 2 years to 40.2 years.
- Population growth will continue to be unevenly distributed across Australia and South Australia is projected to be the second lowest growth state.

South Australia:

- Population growth is projected to fall from 1.1 per cent in 2024/25 to around 0.6 per cent in 2035/36.
- Net Overseas Migration is the main driver of population growth in SA, and this is expected to continue albeit at a lower level.
- Natural increase contributes only a small amount of growth, compared to other states.
- Net Interstate Migration losses, particularly of the younger working age population, are assumed to increase from 1500 in 2024/25, to 3500 by 2035/36.

For further details about the research and key assumptions refer to [2025 Population Statement](#).

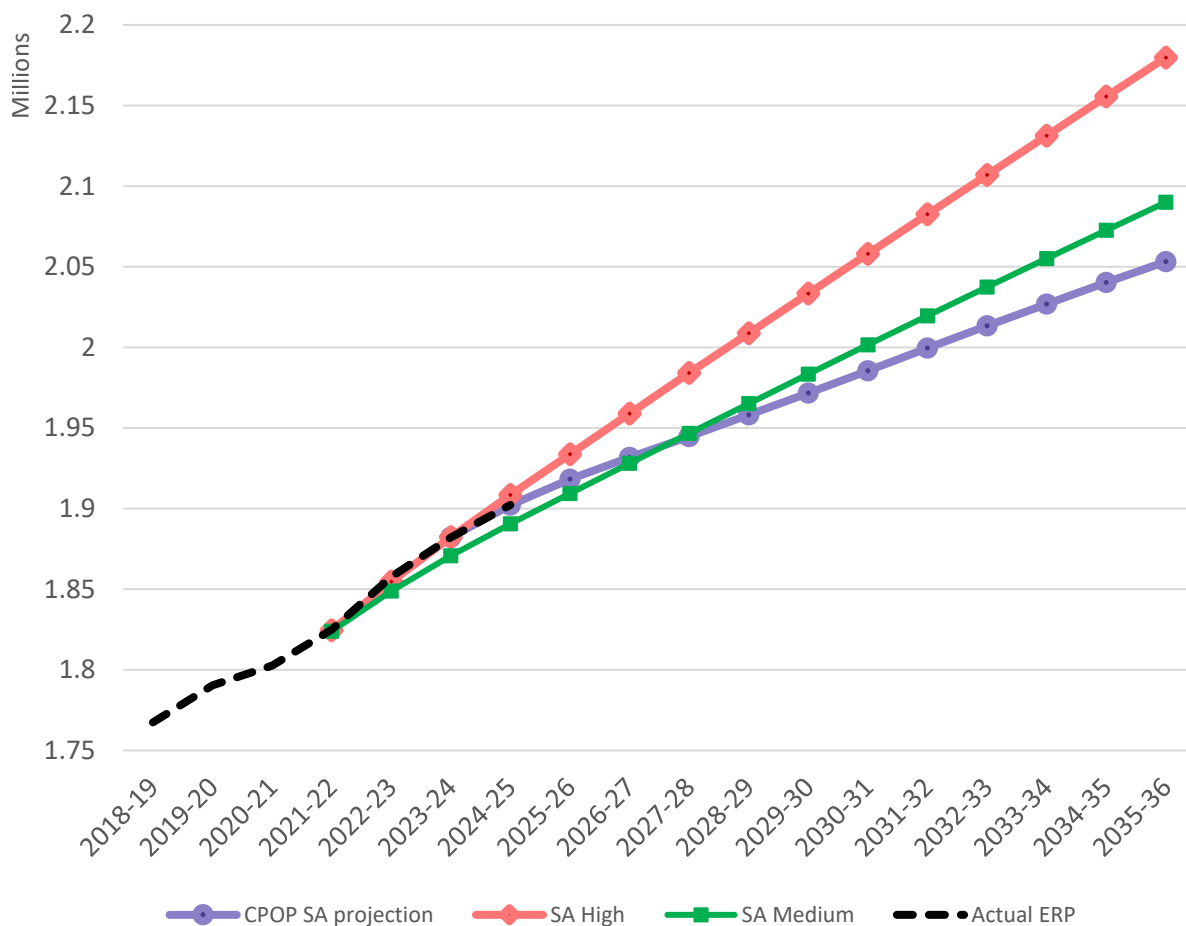
South Australian government population projections

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The following chart compares the SA government high and medium growth projections with the latest CPOP projection. It also shows actual ABS population data from 2018-25 and demonstrates that our current growth trajectory is trending just under the SA high growth scenario.

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Demographic assumptions

The assumptions informing the State Government’s 2023 population projections were developed with guidance from a demographic specialist and through consultation with relevant government agencies. Assumptions were applied to the base-year population figures of 30 June 2021, to compile low, medium, and high population projection series.

The key assumptions used to develop these projections were:

- Net Overseas Migration (NOM) is the key driver of state population growth, and is expected to continue at around 16,000 - 17,000 per annum (high series)
- Net Interstate Migration (NIM) is assumed to show ongoing improvement over the projection period relative to the trend of the previous 20 years. For the high series NIM was assumed to remain slightly positive (1000/annum to 2036). For the medium series NIM was projected at -1000/annum (which is close to the actual level at June 2025).
- Natural increase is projected to decline due to lower fertility and an increased number of deaths as the population ages.



Table 1 compares the assumptions used by CPOP to prepare projections for their 2025 Population Statement, with the assumptions used for the South Australian government projections (high and medium series).

Table 1 Summary of population growth component assumptions

Components	CPOP	SA High series	SA Medium series
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The key differences between the assumptions are:

- Net Overseas Migration – CPOP assumes NOM reducing to 14,100 by 2036 whereas our high scenario is around 16,500.
- Net Interstate Migration – CPOP assumes annual NIM losses of around 3,500 by 2036 whereas our projections are more optimistic with a NIM level between +1000 (high) and -1000 (medium).
- Total Fertility Rates – CPOP uses 1.42 in 2025 increasing to 1.62 by 2036. Our high growth fertility assumption is 1.75, and the medium is set at 1.62.

Summary

Assumptions about the components of population growth do make a significant difference to the overall size and composition of the future population. The analysis above demonstrates this by comparing the recent CPOP projection with the SA government projections for the next decade. In 2036, the South Australian government high growth projection is around 125,000 higher than the CPOP projection. The medium projection is 36,000 higher.

For more information

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