PlanSA

Population Projections for South Australia and Regions – 2021 to 2051

June 2023

Government of South Australia
Department for Trade and Investment

Disclaimer

While every reasonable effort has been made to ensure that this document is correct at the time of publication, the Minister for Planning and Local Government, the State Planning Commission, the State of South Australia, its agencies, instrumentalities, employees and contractors disclaim any and all liability to any person in respect to anything or the consequence of anything done or omitted to be done in reliance upon the whole or any part of this document.

Issued by the Department for Trade and Investment

Version 3: 30 June 2023

Government of South Australia
Department for Trade and Investment

TABLE OF CONTENTS

1. Summary 1
2. Background 3
2.1 Population projections 3
2.2 Geography 3
2.3 Recent population change 5
3. Methodology 9
3.1 Projection method 9
3.2 Projection series 9
3.3 State Assumptions 9
3.3.1 Fertility 9
3.3.2 Life Expectancy 11
3.3.3 Net Overseas Migration (NOM) 12
3.3.4 Net Interstate Migration (NIM) 14
4. Projection Results – South Australia, 2021-51 15
4.1 Population growth 15
4.2 Changes in age structure 16
4.2.1 Median age 16
4.2.2 Age-sex structure 17
4.2.3 Age groups 17
4.3 Greater Adelaide Planning Region (GAPR), 2021-2051 22
4.4 Regional South Australia, 2021-2051 24
5. Projection Results by region, 2021-41 27
5.1 Inner Metro 28
5.2 Adelaide West 30
5.3 Inner North 32
5.4 Inner South 34
5.5 Outer North 36
5.6 Outer South 38
5.7 Adelaide Hills 40
5.8 Murray Bridge 42
5.9 Northern Plains and Barossa 44
5.10 Fleurieu Peninsula 46
5.11 Kangaroo Island 48
5.12 Eyre Peninsula and South West 50
5.13 Whyalla 52
5.14 Limestone Coast 54
5.15 Mount Gambier 56
5.16 Mid North 58
5.17 Murray and Mallee 60
5.18 Outback North and East 62
5.19 Yorke Peninsula 64
6. Appendicies 67
Appendix 1: Assumptions all-of-State population projection series, 2016-41 67
Appendix 2:Population Projections by Service Age Groups 68

LIST OF FIGURES

Figure 1: Population projection regions, South Australia, 2021 4
Figure 2: Population growth components, South Australia, 1991 - 2022 5
Figure 3: Age-specific fertility rates –South Australia 10
Figure 4: Actual and Projected Total Fertility Rates, South Australia 2001 to 2051 11
Figure 5: Projected Life Expectancy at Birth (Medium series), South Australia, 2021-2051 12
Figure 6: Migration Program planning level and published NOM, 1971-2021 13
Figure 7: Actual and Projected Net Overseas Migration Flows to South Australia, 2001-2051 13
Figure 8: Actual and Projected Net Interstate Migration Flows, South Australia, 1997-2041 14
Figure 9: Projected population by projection series, South Australia, 2021-2051 15
Figure 10: South Australia projected age-sex structure in 2036 and 2051 (Medium series) 17
Figure 11: Projected young children (0-4 years) population, South Australia, 2021-51 18
Figure 12: Projected school-age (5-17 years) population, South Australia, 2021-51 18
Figure 13: Projected young working-age (18-34 years) population, South Australia, 2021-51 19
Figure 14: Projected older working-age (35-64 years) population, South Australia, 2021-51 19
Figure 15: Projected older working-age (35-64 years) population, South Australia, 2021-51 20
Figure 16: Projected active retirees (65-79 years) population, South Australia, 2021-51 20
Figure 17: Projected older population (80+ years) population, South Australia, 2016-41 21
Figure 18: Projected Population, Greater Adelaide Planning Region, 2021-2051 23
Figure 19: Population by service age group, Greater Adelaide Planning Region, 2021 vs 2051 23
Figure 20: Projected Population, Regional South Australia, 2021-2051 25
Figure 21: Population by service age group, Regional South Australia, 2021 vs 2051 25
Figure 22: Projected Population, Inner Metro Planning Region, 2021-2041 29
Figure 23: Population by service age group – medium series, Inner Metro Region, 2021 vs 2041 29
Figure 24: Projected Population, Adelaide West Region, 2021-2041 31
Figure 25: Population by service age group – medium series, Adelaide West Region, 2021 vs 2041 31
Figure 26: Projected Population, Inner North Region, 2021-2041 33
Figure 27: Population by service age group – medium series, Inner North Region, 2021 vs 2041 33
Figure 28: Projected Population, Inner South Region, 2021-2041 35
Figure 29: Population by service age group – medium series, Inner South Region, 2021 vs 2041 35
Figure 30: Projected Population, Outer North Region, 2021-2041 37
Figure 31: Population by service age group – medium series, Outer North Region, 2021 vs 2041 37
Figure 32: Projected Population, Outer South Region, 2021-2041 39
Figure 33: Population by service age group – medium series, Outer South Region, 2021 vs 2041 39
Figure 34: Projected Population, Adelaide Hills Region, 2021-2041 41
Figure 35: Population by service age group – medium series, Adelaide Hills Region, 2021 vs 2041 41
Figure 36: Projected Population, Murray Bridge Region, 2021-2041 43
Figure 37: Population by service age group – medium series, Murray Bridge Region, 2021 vs 2041 43
Figure 38: Projected Population, Northern Plains and Barossa Region, 2021-2041 45
Figure 39: Population by service age group – medium series, Northern Plains and Barossa Region, 2021 vs 2041 45
Figure 40: Projected Population, Fleurieu Peninsula Region, 2021-2041 47
Figure 41: Population by service age group – medium series, Fleurieu Peninsula Region, 2021 vs 2041 47
Figure 42: Projected Population, Kangaroo Island Region, 2021-2041 49
Figure 43: Population by service age group – medium series, Kangaroo Island Region, 2021 vs 2041 49
Figure 44: Projected Population, Eyre Peninsula and South West Region, 2021-2041 51

Figure 45: Population by service age group – medium series, Eyre Peninsula and South West Region, 2021 & 2041 51
Figure 46: Projected Population, Whyalla Region, 2021-2041 53
Figure 47: Population by service age group – medium series, Whyalla Region, 2021 & 2041 53
Figure 48: Projected Population, Limestone Coast Region, 2021-2041 55
Figure 49: Population by service age group – medium series, Limestone Coast Region, 2021 & 2041 55
Figure 50: Projected Population, Mount Gambier Region, 2021-2041 57
Figure 51: Population by service age group – medium series, Mount Gambier Region, 2021 & 2041 57
Figure 52: Projected Population, Mid North Region, 2021-2041 59
Figure 53: Population by service age group – medium series, Mid North Region, 2021 and 2041 59
Figure 54: Projected Population, Murray and Mallee Region, 2021-2041 61
Figure 55: Population by service age group – medium series, Murray and Mallee Region, 2021 & 2041 61
Figure 56: Projected Population, Outback North and East Region, 2021-2041 63
Figure 57: Population by service age group – medium series, Outback North and East Region, 2021 & 2041 63
Figure 58: Projected Population, Yorke Peninsula Region, 2021-2041 65
Figure 59: Population by service age group – medium series, Yorke Peninsula Region, 2021 & 2041 65

LIST OF TABLES

Table 1: Estimated Resident Population (ERP) 2001, 2011 & 2021 by Region 6
Table 2: Projected total population and growth rates, South Australia, 2021-51 16
Table 3: Median age (years) of projected South Australia population by projection series, 2016-41 16
Table 4: Projected Population, Greater Adelaide Planning Region, 2021-2051 22
Table 5: Projected Population, Rest of State, 2021-2051 24
Table 6: Population Projection summary by Region, 2021-2041 (medium series) 27
Table 7: Projected Population, Inner Metro Region, 2021-2041 28
Table 8: Projected Population, Adelaide West Region, 2021-2041 30
Table 9: Projected Population, Inner North Region, 2021-2041 32
Table 10: Projected Population, Inner South Region, 2021-2041 34
Table 11: Projected Population, Outer North Region, 2021-2041 36
Table 12: Projected Population, Outer South Region, 2021-2041 38
Table 13: Projected Population, Adelaide Hills Region, 2021-2041 40
Table 14: Projected Population, Murray Bridge Region, 2021-2041 42
Table 15: Projected Population, Northern Plains and Barossa Region, 2021-2041 44
Table 16: Projected Population, Fleurieu Peninsula Region, 2021-2041 46
Table 17: Projected Population, Fleurieu Peninsula Region, 2021-2041 48
Table 18: Projected Population, Eyre Peninsula and South West Region, 2021-2041 50
Table 19: Projected Population, Whyalla Region, 2021-2041 52
Table 20: Projected Population, Limestone Coast Region, 2021-2041 54
Table 21: Projected Population, Mount Gambier Region, 2021-2041 56
Table 22: Projected Population, Mid North Region, 2021-2041 58
Table 23: Projected Population, Murray and Mallee Region, 2021-2041 60
Table 24: Projected Population, Outback North and East Region, 2021-2041 62
Table 25: Projected Population, Yorke Peninsula Region, 2021-2041 64

1. SUMMARY

This report presents an overview of the key assumptions and population projection results for South Australia and 19 regions[1] for the 30-year period from 2021 to 2051.

The Department for Trade and Investment (DTI) prepares population projections for South Australia at the all-of-State and regional level to provide a common base for land use, infrastructure and service planning.

Projections are important because they not only show the potential size and distribution of the future population, but also provide vital information about the future age structure of the population.

Background and Assumptions

South Australia's population reached 1.83 million in 2022 and has increased steadily by around 1 per cent per annum over the past 10 years. Over the same period Australia's growth rate was around 1.5 per cent per annum.

Net Overseas Migration (NOM) has been the main contributor to South Australia's population growth since the early 2000s and has bounced back strongly from the COVID related slowdown (in 2020/2021 NOM was -3000).

As the COVID-19 pandemic has shown, alternative projection series are needed to address future uncertainty and to provide alternative growth scenarios for users. Three projections (high, medium and low growth) have been prepared using varied assumptions about the components of growth (births, deaths, overseas and interstate migration).

The key assumptions used to develop these projections are:

- Net Overseas Migration (NOM) is our key driver of population growth, and this is expected to continue. For these projections NOM is assumed at 16,500 per annum for the high scenario, 14,500 for the medium and 12,000 per annum for the low. Any significant variance from these assumptions over time will greatly impact on future population outcomes.
- Net Interstate Migration (NIM) is assumed to show ongoing improvement over the projection period relative to the trend of the previous 20 years (pre-COVID) which saw annual losses of around 4,000 persons per annum. For the high scenario, NIM is assumed to remain slightly positive at +1,000 per annum. For the medium scenario, a slight NIM loss of 1000 per annum is assumed.
- The rate of natural population increase (births and deaths) has been relatively steady at around 5,000 per annum over the past decade. Assumptions about future fertility, mortality and life expectancy have been factored into the modelling. In general, birth rates are declining (which is consistent with declining fertility rates in most developed countries), and death rates are slowly increasing as the population ages.

[1] The Australian Bureau of Statistics' SA4 & SA3 geographic boundaries were used to develop the population projections regions. SA4s are the largest sub-State regions in the Main Structure of the Australian Statistical Geography Standard (ASGS).

Projection Results

South Australia

- In the decade between the population censuses of 2011 and 2021 the State's population grew by 164,000 from 1.64 million to 1.80 million. In the next decade it is projected to grow by an additional 204,000 to total 2.01 million in 2031 under the medium growth projection.
- Both the Medium and High projections result in strong and continued growth throughout the projection period. South Australia's population reaches 2 million by 2031 for the medium scenario, and by 2029 for the high.
- In the longer term (to 2051), the population is projected to increase by up to 730,000 for the high and by around 530,000 for the medium scenario.
- The high projection would see an annual average growth rate of 1.4% over 30 years, while for the medium it would be around 1%.
- The medium projection is considered the most likely demographic future based on analysis of births, deaths and migration trends.
- The State's population will age significantly over the projection period under all projections. For the medium scenario, the number of 'active retirees' (65-79) is projected to increase by 30% from 260,000 in 2021 to 337,000 by 2051.
- More importantly, over the same period the 'older population' (80+ years) is projected to increase by 146% from 92,000 to nearly 227,000 by 2051. This has significant implications for the provision of health, social and transport services.

Regions

- Projections for the 19 regions provide a more detailed view of growth across the State. Within Greater Adelaide there are 10 regions and 9 regions for country SA.
- The population of the Greater Adelaide region (1.52 million in 2021) is expected to continue to grow strongly and increase its share of the total population by 2051. Under the high scenario, Greater Adelaide will increase by 670,000 over the next 30 years and by around 490,000 people for the medium. It is projected to make up 86% of the State's population by 2051.
- Regional population projections are informed by a range of different information sources including; current and predicted housing activity, land supply and development trends (i.e. small scale infill, greenfield), significant economic developments (especially in the country areas) and planning policies.
- The underlying demographic characteristics of each region has a significant bearing on the future size and age structure of its population. For each region high, medium and low projections have been developed to provide a range of plausible growth outcomes (refer Section 5 for details).

2. BACKGROUND

2.1 Population projections

This report summarises the key assumptions and preliminary population projection results for South Australia and its regions[2]. The projections cover a 30-year period from 2021 to 2051.

The Department for Trade and Investment (DTI) prepares population projections for South Australia at the all-of-State and regional level to provide a common base for land use, infrastructure and service planning.

The assumptions used for these projections were developed based on expert advice on demographic trends and population change provided by Dr Tom Wilson (Advanced Demographic Modelling)[3]. Dr Wilson also provided the demographic models needs to produce age-sex projections for South Australia and regions.

Demographic data from the Australian Bureau of Statistics (ABS) 2021 census, and other ABS population data collections (births, deaths, migration) was used to establish the base population for these projections.

As the COVID-19 pandemic has shown, alternative projection series are needed to address future uncertainty and to provide alternative growth scenarios for users. Three projections series (high, medium and low growth) have been prepared using varied assumptions about the components of growth (births, deaths, overseas and interstate migration).

The medium projection is considered the most likely demographic future based on analysis of births, deaths and migration trends. However, for land use planning the high projection is used to ensure an adequate supply of future growth opportunities are identified should growth be higher than expected.

2.2 Geography

To provide a more detailed breakdown of projected population growth, the State has been divided into 19 separate regions (Figure 1). These regions are designed to align with the ABS geography and are concordant with the South Australian Planning regions[4].

Greater Adelaide is made up of 10 regions (including Murray Bridge).

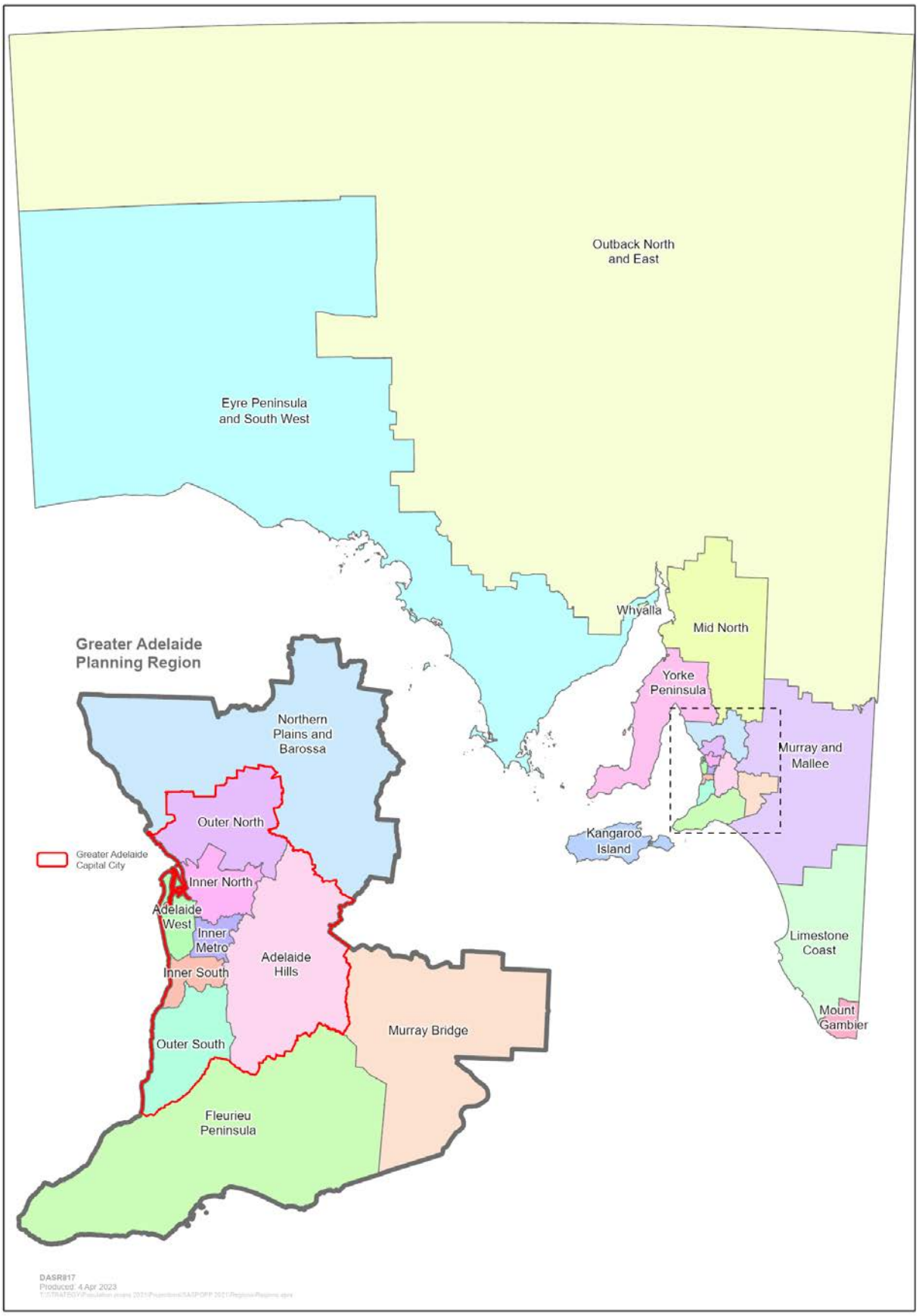
Regional South Australia is made up of 9 regions, including three sub-regions, created to enable a more detailed assessment of potential population growth impacts based on key economic development projects (i.e. Whyalla).

[2] The Australian Bureau of Statistics' SA4 & SA3 geographic boundaries were used to develop the population projection regions. SA4s are the largest sub-State regions in the Main Structure of the Australian Statistical Geography Standard (ASGS).

[3] Demographic Trends in South Australia and Projection Assumption Suggestions, Dr Tom Wilson (Advanced Demographic Modelling), February 2023.

[4] The seven South Australian Planning regions are: Greater Adelaide, Eyre & Western, Far North, Kangaroo Island, Limestone Coast, Murray Mallee, Yorke Peninsula & Mid north

Figure 1: Population projection regions, South Australia, 2021



2.3 Recent population change

South Australia

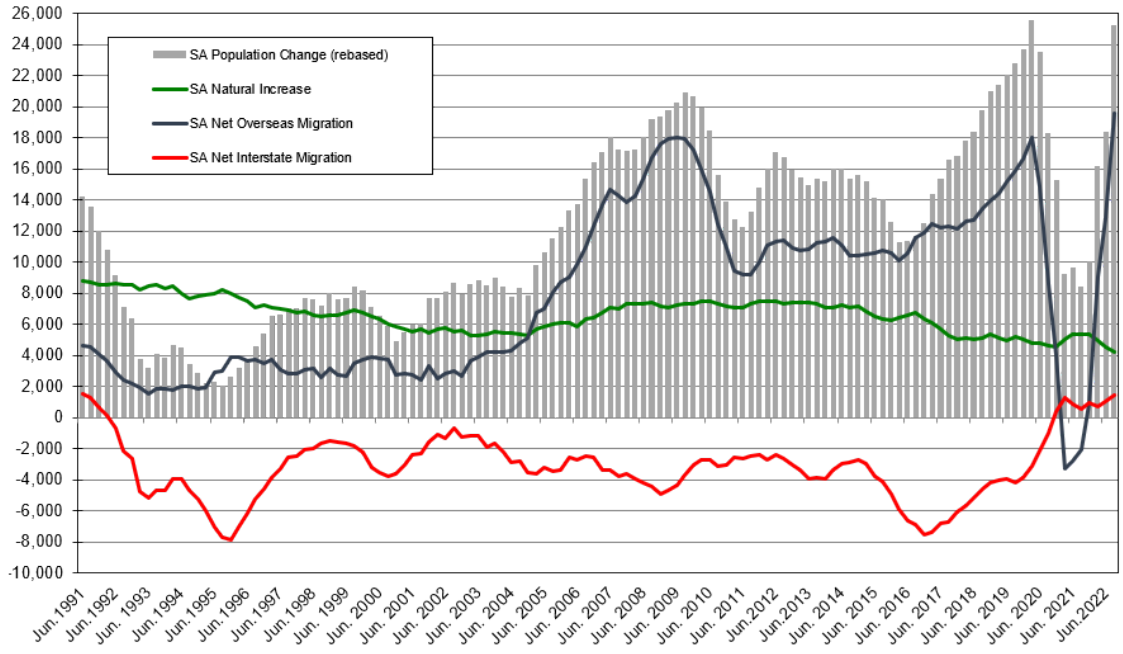
Between 2001 and 2021 South Australia's estimated resident population increased by around 300,000 persons at an average annual growth rate of 15,000 persons (1.0%). Over the same period, Australia's average annual population growth rate was 1.6%.

Population change is driven by migration (net overseas migration (NOM) and net interstate migration (NIM)) and natural increase (births and deaths). Figure 2 shows the change in population growth components over the past 30 years to June 2022. In this time South Australia's annual population growth has fluctuated from less than 5,000 in the mid 1990's to more than 20,000 in both 2009, 2018-20 and more recently in 2022.

The chart provides a longer-term view of the growth components (especially NOM and NIM) which are important factors when developing assumptions for population projections. The impact of COVID can be clearly seen from 2020 with South Australia experiencing a significant decline in NOM, and slightly positive NIM growth for the first time in almost 30 years. The degree to which the NIM gain can be maintained in the future will be a key determinant on the size of our annual population growth.

Overseas migration has been a strong contributor to overall growth since the early 2000s and has bounced back strongly from the COVID induced dip in 2020/2021. For the 12 months to September 2022 the NOM gain was over 19,000 persons. However, this is expected to settle at a slightly lower level over the next few years as the large recent gain can be mostly attributed to returning students and temporary workers following COVID.

Figure 2: Population growth components, South Australia, 1991 - 2022



Regional Population

Table 1 summarises the total population[5] in each region in 2001, 2011 and 2021. The table also shows the range of base populations for each region ranging from Kangaroo Island with only 5000 people to the Inner North region with more than 320,000 people.

Table 1: Estimated Resident Population (ERP) 2001, 2011 & 2021 by Region

Greater Adelaide	2001	2011	2021	chg 2001-11	%chg 2001-11	chg 2011-21	%chg 2011-21
Adelaide Hills	61,883	69,704	80,501	7,821	12.6%	10,797	15.5%
Adelaide West	209,034	224,252	247,123	15,218	7.3%	22,871	10.2%
Fleurieu Peninsula	32,985	42,752	51,612	9,767	29.6%	8,860	20.7%
Inner Metro	198,540	217,811	235,366	19,271	9.7%	17,555	8.1%
Inner North	260,026	288,583	321,850	28,557	11.0%	33,267	11.5%
Inner South	172,709	185,343	200,133	12,634	7.3%	14,790	8.0%
Murray Bridge	17,313	20,508	22,689	3,195	18.5%	2,181	10.6%
Northern Plains and Barossa	29,681	33,715	38,797	4,034	13.6%	5,082	15.1%
Outer North	94,512	113,724	139,452	19,212	20.3%	25,728	22.6%
Outer South	151,302	164,674	177,968	13,372	8.8%	13,294	8.1%
Greater Adelaide total	**1,227,985**	**1,361,066**	**1,515,491**	**133,081**	**10.8%**	**154,425**	**11.3%**

Regional SA	2001	2011	2021	chg 2001-11	%chg 2001-11	chg 2011-21	%chg 2011-21
Eyre Peninsula and South West	34,051	35,236	37,004	1,185	3.5%	1,768	5.0%
Kangaroo Island	4,227	4,522	4,999	295	7.0%	477	10.5%
Limestone Coast	31,223	30,648	31,970	-575	-1.8%	1,322	4.3%
Mid North	40,895	40,737	41,287	-158	-0.4%	550	1.4%
Mount Gambier	31,109	33,727	36,572	2,618	8.4%	2,845	8.4%
Murray and Mallee	50,967	48,401	50,408	-2,566	-5.0%	2,007	4.1%
Outback North and East	29,322	29,143	26,714	-179	-0.6%	-2,429	-8.3%
Whyalla	22,003	22,471	21,868	468	2.1%	-603	-2.7%
Yorke Peninsula	31,679	33,663	36,879	1,984	6.3%	3,216	9.6%
Regional SA total	**275,476**	**278,548**	**287,701**	**3,072**	**1.1%**	**9,153**	**3.3%**
South Australia total	**1,503,461**	**1,639,614**	**1,803,192**	**136,153**	**9.1%**	**163,578**	**10.0%**

[5] ABS Estimated Resident Population in each region in 2001, 2011 & 2021.

Greater Adelaide Planning Region

Over the past 10 years (2011-21), Greater Adelaide's population increased by 11.3% while Regional South Australia increased by only 3.3%.

In terms of total population, the Greater Adelaide region[6] accounts for over 84% of the State's population. This share has been steadily increasing for over many decades as many smaller regional communities have continued to lose population.

Between 2011 and 2021:

- Greater Adelaide's population increased by 154,400 persons.
- This region accounted for just over 94% of the State's total population growth.

[6] Based on the Greater Adelaide Planning region, includes Murray Bridge

3. METHODOLOGY

3.1 Projection method

The projections presented in this report were developed using a suite of population projection models developed for South Australia by Dr Tom Wilson (Advanced Demographic Modelling). The models use a cohort-component method whereby the populations at the time of the 2021 Census for each geographic area and for each single year of age by sex are projected forward year by year by applying assumptions about future trends in fertility, mortality and migration. These assumptions are summarised in Section 3.3

3.2 Projection series

A high, medium and low series of projections have been developed using different assumptions about the population growth components (overseas and interstate migration, fertility and mortality). Alternative projection series are used to address future uncertainty and to provide alternative growth scenarios for users.

The projections are designed to provide a long-term view of future growth and are provided for a 30-year period to 2051. Users of the projections should carefully consider their planning horizon and choose the most appropriate time period from the data.

Based on past demographic trends and likely future trajectories for the major components of population change, the three series represent the likely range of future population growth. The Medium series is considered the most likely outcome at the time of publication.

3.3 State Assumptions

The assumptions about future fertility, mortality and migration that were applied to the base-year population (30 June 2021) to construct the three all-of-State population projection series are based on:

- analysis of births, deaths and migration data collected by the ABS
- expert demographic advice on the components of growth and their likely future direction provided by Dr Tom Wilson (Advanced Demographic Modelling)
- consultation with key government agencies seeking additional information to inform the projections.

The three population projections (high, medium and low) are presented at the regional level for the 30-year projection period, 2021-51. Each is designed to represent a plausible range of future growth outcomes for the growth components.

- These all-of-State assumptions are summarised in Appendix 1.

3.3.1 Fertility

Fertility assumptions developed for these projections use ABS past estimates of fertility, and demographic advice on future directions. In general, South Australia has experienced slightly lower fertility than the rest of Australia, mainly due to our older population.

Figure 3 shows age-specific fertility for South Australia and clearly demonstrates the shift in the fertility age profile over time. In 1981 peak fertility was around 26 years whereas by 2021 it had shifted to 32 years.

Figure 3: Age-specific fertility rates –South Australia

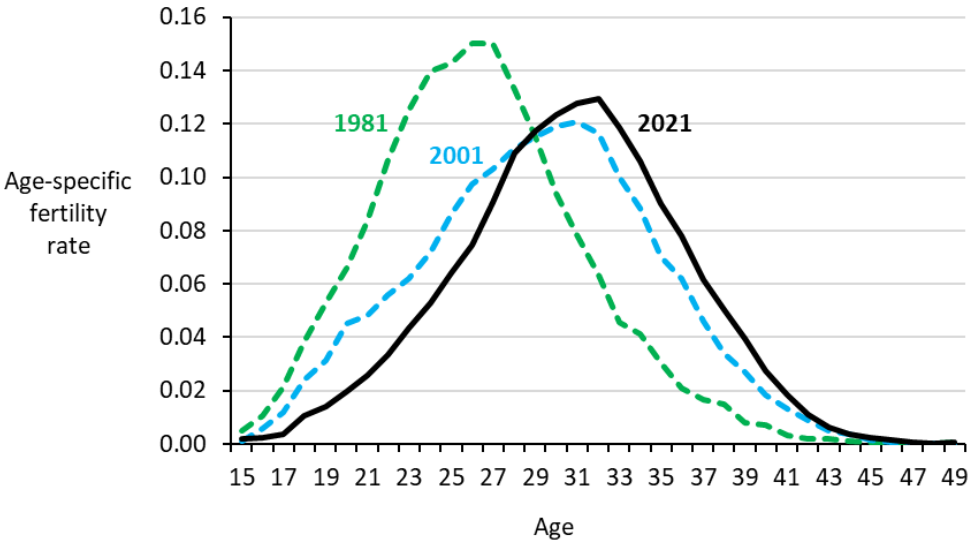


Figure 4 shows actual fertility rates from 2001 to 2021 and the quick rise in fertility to more than 1.97 in 2008-09, before declining to its 2021 level of 1.66. The increase in fertility during this time is thought to be due to a 'catch up' effect from women in older childbearing ages due to earlier birth postponement together with increases in disposable incomes[7]. The 'baby bonus'[8] is not thought to have had any significant influence in increasing fertility.

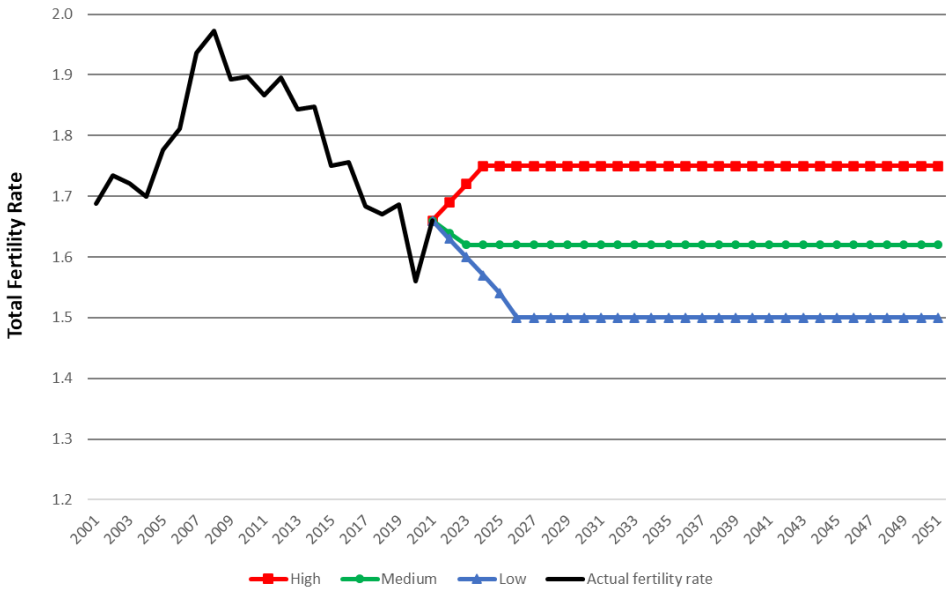
More recently, the Total Fertility Rate (TFR) dropped slightly in 2020 due to uncertainty about the future at the start of the COVID pandemic, followed by a recovery in 2021.

The following fertility assumptions have been adopted in these projections (refer Figure 4):

- High scenario - the current fertility rate of 1.66 improves steadily to reach 1.75 by 2025 and is then held constant.
- Medium scenario - TFR of 1.62 children for the duration of the projection period from 2023. This is slightly below the latest published rate of 1.66 for South Australia but is consistent with the broader trend of declining fertility in many developed countries. This assumption is consistent with the latest Centre for Population[9] fertility estimates for South Australia.
- Low scenario - fertility drops steadily to 1.5 by 2026 and is then held constant.

[7] Dr Tom Wilson (Advanced Demographic Modelling). Internal report prepared for the Department of Trade and Investment January 2023.
[8] 'Baby bonus' was introduced in the year after Australia's population hit its lowest birth rate ever recorded (1.7) in 2001, with the aim to increase fertility rates and offset the peak of Australia's ageing population.
[9] https://population.gov.au/

Figure 4: Actual and Projected Total Fertility Rates, South Australia 2001 to 2051

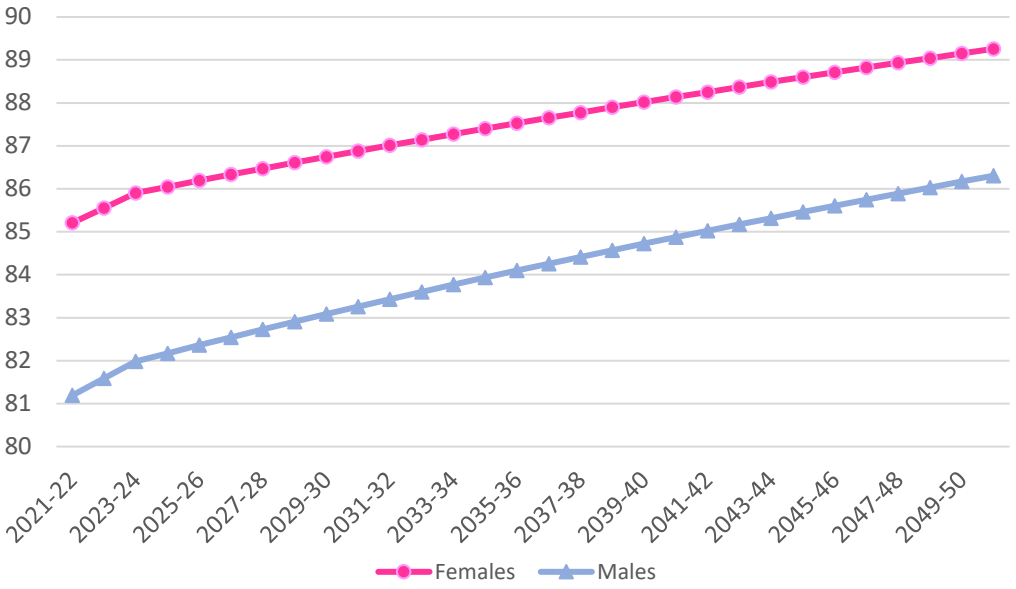


Source: DTI population projections and Australian Bureau of Statistics (2021), Births, Australia and DTI population projections.

3.3.2 Life Expectancy

- Life expectancy at birth estimates represent the average number of years that a new-born baby could expect to live, assuming current age-specific death rates are experienced through his/her lifetime. In 2021, life expectancy at birth for South Australians was 81.3 years for males and 85.6 years for females.
- For all projection series, male life expectancies at birth are assumed to increase from 81.3 years in 2021 to 86.3 in 2051, and female life expectancies are assumed to increase from 85.3 years to 89.3 in 2051 (Figure 5).

Figure 5: Projected Life Expectancy at Birth (Medium series), South Australia, 2021-2051



Source: DTI population projections and ABS Life Tables

Provisional mortality data shows an elevated number of deaths during the COVID years (2020-22). To account for this the demographic modelling does include a slight adjustment to account for these higher death rates.

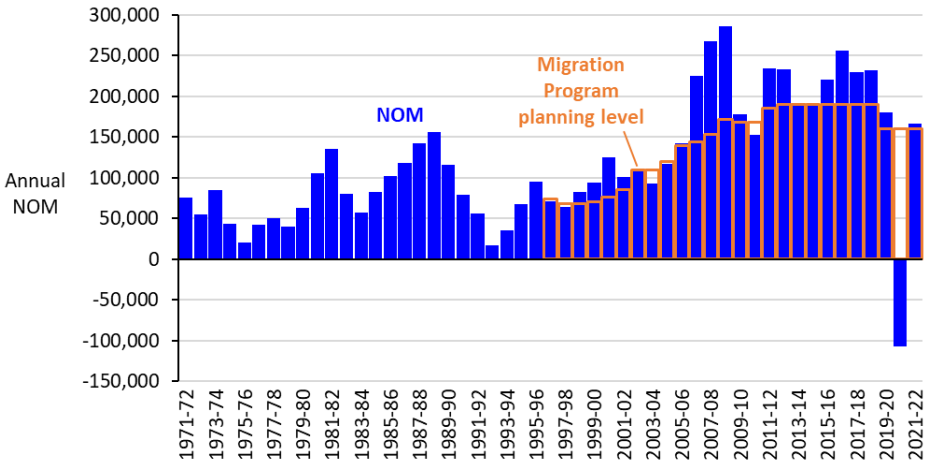
3.3.3 Net Overseas Migration (NOM)

In South Australia the assumption that has the greatest impact on the overall size of the projected population is the future level of net overseas migration (NOM), the net of overseas arrivals and overseas departures. NOM flows are typically large and in 2019/20 (prior to the full impact of COVID related international border closures) there were 26,650 NOM arrivals and 11,510 NOM departures for a net gain of 15,140 persons.

Future levels and distribution of NOM are difficult to predict and are affected by many factors including:

- The size of the annual migration program (190,000 in 2022/23). This can vary considerably, and the actual NOM outcome typically doesn't always exactly match the planning level as shown in Figure 6.
- The proportion of visas issued onshore to people who have migrated to Australia, often on temporary working and student visas. This in part helps to explain the difference between the NOM planning level and the actual NOM outcome.
- The demand for temporary workers to meet identified skill gaps.
- The strength/weakness of the economic cycle and the relative attractiveness of different parts of Australia for jobs, lifestyle, connection to existing migrant communities etc. South Australia's share of the national NOM intake has traditionally averaged around 6% over the period 2006-19, but this does vary considerably.

Figure 6: Migration Program planning level and published NOM, 1971-2021



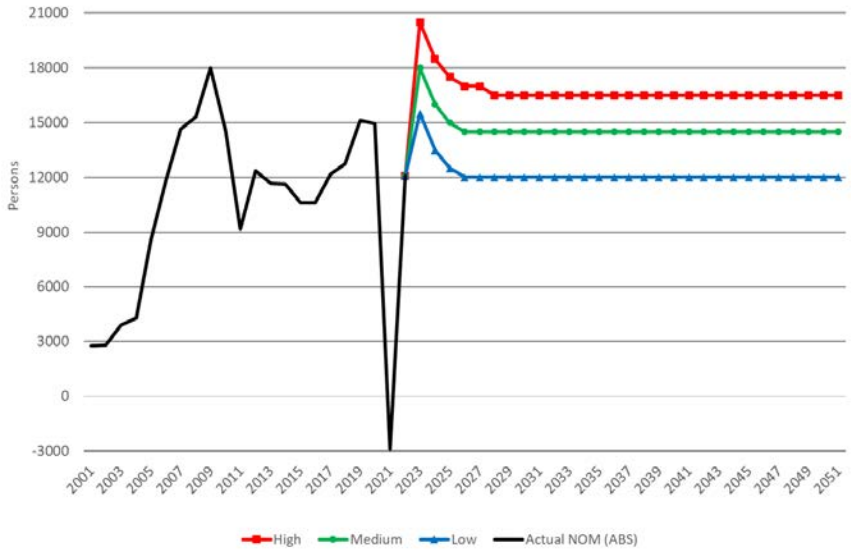
Source: ABS demographic data 3101.0 National, state and territory population. Commonwealth Department for Home Affairs

Figure 7 shows the published NOM for South Australia from 2001 to 2021, and the assumed NOM levels to 2051. The impact of the international border closure during COVID can be clearly seen with a recorded NOM of -3000 persons in 2020-21, prior to that NOM had been around 13,000 for the previous decade.

The following NOM assumptions have been used for these projections:

- NOM will peak over 20,000 in 2022/23 as the COVID recovery continues to bring back more temporary and permanent migrants, with fewer leaving. Once the recovery is complete it is expected that overseas migration flows will return to a more normal pattern.
- High series NOM will settle at 16,500 per annum from 2026 and then hold constant.
- Medium series NOM will settle at 14,500 per annum from 2026 and then hold constant.
- Low series NOM will settle much lower at 12,000 per annum from 2026 and then hold constant. This is below the 2006-19 average annual NOM of around 13,000.

Figure 7: Actual and Projected Net Overseas Migration Flows to South Australia, 2001-2051



Source: Australian Bureau of Statistics (quarterly), National, state and territory population and DTI population projections.

3.3.4 Net Interstate Migration (NIM)

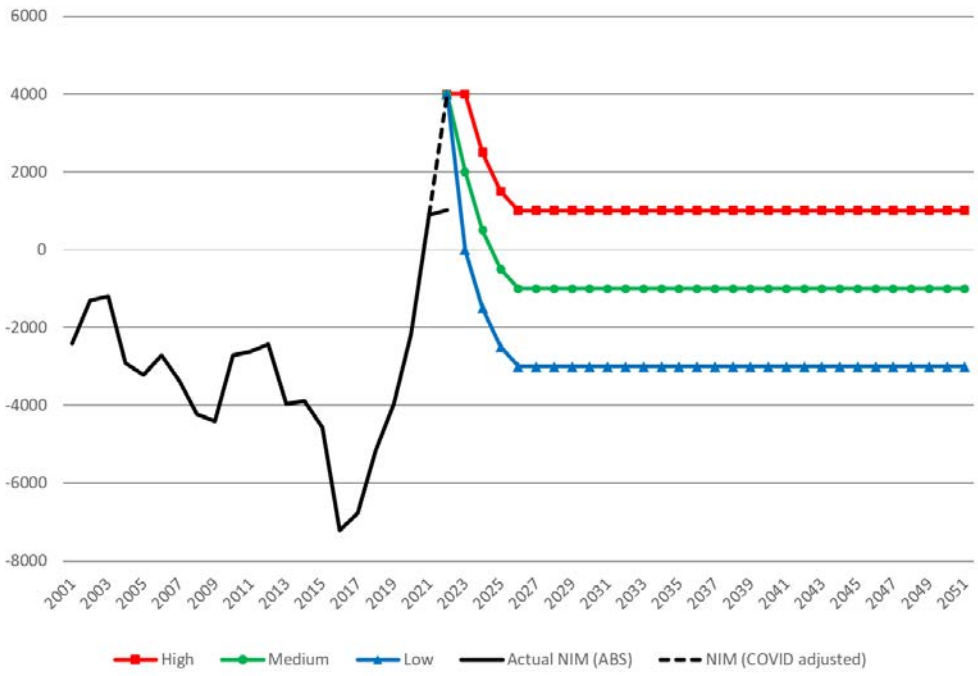
Net interstate migration (NIM) can exhibit sudden and dramatic changes in flows and the net figure is the residual of much larger in and out flows of interstate migrants. For example, in the 12 months to June 2022 South Australia had 31,000 arrivals and almost 30,000 departures interstate, resulting in a net interstate gain of 1,000 persons.

NIM exhibits the greatest uncertainty of all the demographic components of change because (A) it fluctuates in response to economic and social conditions and (B) it is not directly measured by the Australian Bureau of Statistics, who mostly rely on Medicare change of address data to detect interstate movements, which is not always a reliable source.

Figure 8 shows the published NIM for South Australia from 2001 to 2021, and the assumed NIM for the period 2021-2051. The key assumptions are:

- The actual NIM level in 2022 is set higher than the published NIM – represented by the dashed line from 2021 to 2022. This reflects the upward revision to the State's Estimated Resident Population (ERP) following the 2021 census which was mostly driven by COVID-19 border closures.
- For the high scenario NIM will remain positive at 1000 per annum from 2026 and then hold constant.
- For the medium scenario NIM will be slightly negative at -1000 persons per annum from 2026 and then hold constant.
- For the low scenario NIM will return to -3000 per annum from 2026 and then hold constant. This is consistent with the longer-term trend of NIM losses over the 20 years prior to 2020.

Figure 8: Actual and Projected Net Interstate Migration Flows, South Australia, 1997-2041



Source: Australian Bureau of Statistics (quarterly), National, state and territory population, and DTI population projections.

4. PROJECTION RESULTS – SOUTH AUSTRALIA, 2021-51

4.1 Population growth

South Australia

Figure 9 and Table 2 summarise projected population growth for South Australia for the high, medium and low projections.

In the decade between the population censuses of 2011 and 2021 the State's population grew by 164,000 from 1.64 million to 1.80 million. In the next decade, it is projected to grow by an additional 204,000 under the medium projection and by 254,000 under the high.

Both the medium and high projections result in strong and continued growth throughout the projection period. South Australia's population reaches 2 million by 2031 in the medium projection, and by 2029 in the high.

Over the 30-year period the average annual growth rate for the high projection is 1.4% and 1% for the medium.

The total projected increase in South Australia's population over the period 2021-2051 across the three projections is 731,000 (high), 532,000 (medium) and 329,000 (low).

Figure 9: Projected population by projection series, South Australia, 2021-2051

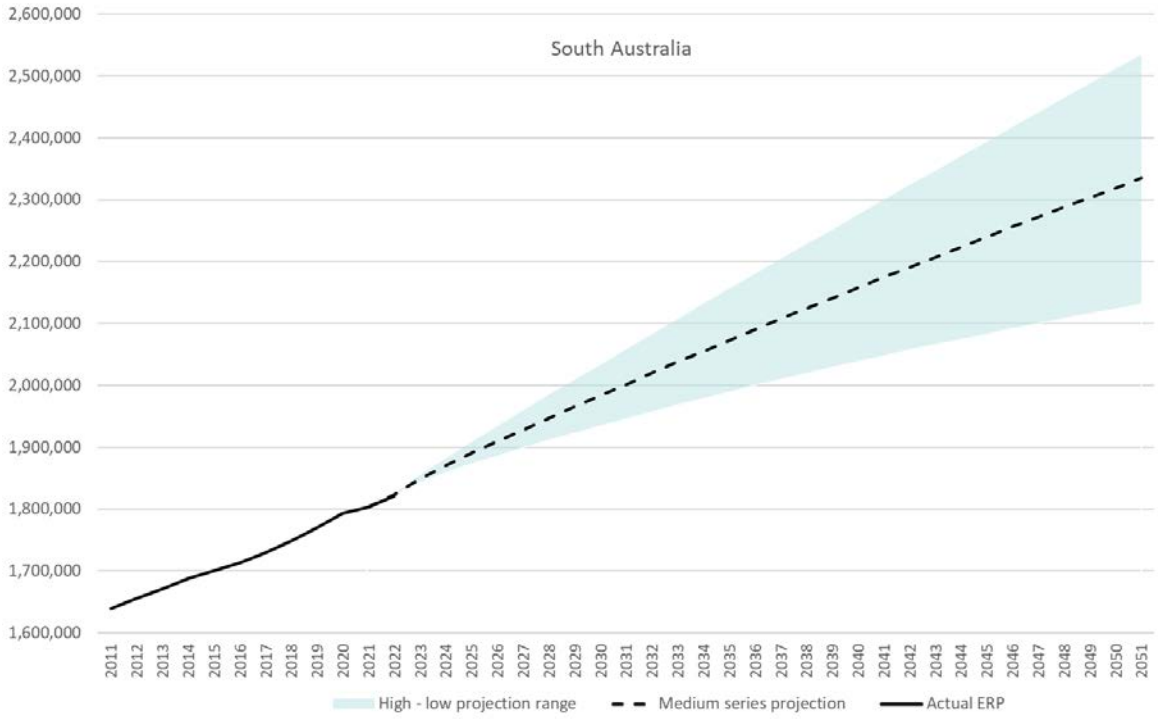


Table 2: Projected total population and growth rates, South Australia, 2021-51

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021 (Base Year)	1,803,192	1,803,192	1,803,192
2031	1,946,815	2,001,612	2,058,069
2041	2,048,740	2,174,497	2,299,354
2051	2,132,544	2,334,832	2,534,424
Change per ten-year interval			
2021-2031	143,623	198,420	254,877
2031-2041	101,925	172,885	241,286
2041-2051	83,804	160,336	235,070
30-year population change			
2021-2051	**329,352**	**531,640**	**731,232**
Average annual % change			
2021-2051	**0.61%**	**0.98%**	**1.35%**

4.2 Changes in age structure

Although the population of South Australia is projected to increase from current levels to 2051 under all projection series, this growth will not be equally distributed throughout all age structures. Due to the ageing of the large post World War II baby-boomer cohort (born between 1946 and 1961 and aged 60-74 years in 2021), the fact that the fertility rates of this cohort were below replacement rates, and improvements in life expectancy, the State's population is projected to age significantly during the projection period under all series.

4.2.1 Median age

The median age of the population is projected to increase under all projection series (Table 3). The median age increases fastest under the low projection (that assumes lower fertility rates and smaller net gains from migration) and slowest under the high.

Under the medium projection the median age is projected to increase from 40.6 in 2021 to 43.0 years by 2051.

Table 3: Median age (years) of projected South Australia population by projection series, 2016-41

Year ending 30 June	Low Series	Medium Series	High Series
2021	40.6	40.6	40.6
2031	42.2	41.6	41.0
2041	43.7	42.5	41.4
2051	44.3	43.0	41.7

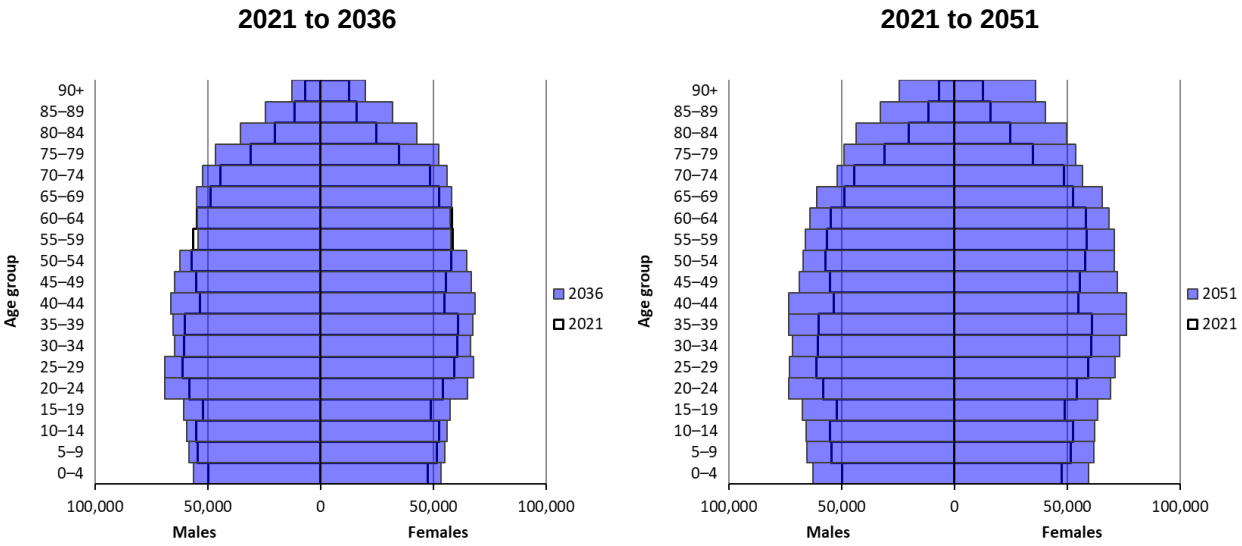
Sources: DTI and ABS Australian Demographic Statistics

4.2.2 Age-sex structure

Figure 10 illustrates the projected age-sex composition of the South Australian population in 2036 and 2051 for the medium projection series, and how the projected age structure in these years compares with the actual age structure of South Australia's population at the 2021 Census.

Under the three projections the number of elderly will increase substantially over the projection period, with most of this increase due to the ageing of the large baby-boomer cohort, whose older members began turning 75 in 2021. The projected size of the elderly population is a similar size under the low, medium and high projection.

Figure 10: South Australia projected age-sex structure in 2036 and 2051 (Medium)



4.2.3 Age groups

Examination of the projected population of selected age groups at five-year intervals under each of the projection series emphasises the size of the projected changes in the major age groups between 2021 and 2051, and the variation by projection series (Figures 11 to 16).

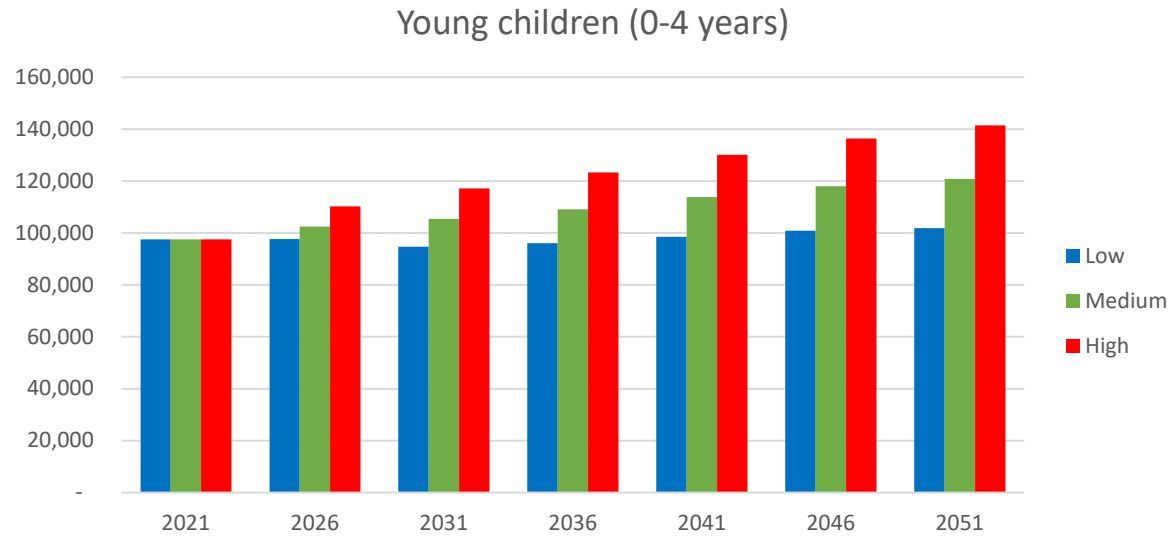
The population age groups examined are:

- Young children, 0-4 years
- School age, 5-17 years
- Young working age, 18-34 years
- Established workers, 35-49 years
- Mature working age, 50-64 years
- Active retirees, 65-79 years
- Older population, 80+ years

Young children, 0-4 years

For the medium projection the total number of young children increases by just over 23,000 between 2021 and 2051. For the high, the number of young children is projected to increase by around 44,000 over the same time (Figure 11). Under the low projection the number of young children is projected to increase by only 4300 over the next 30 years.

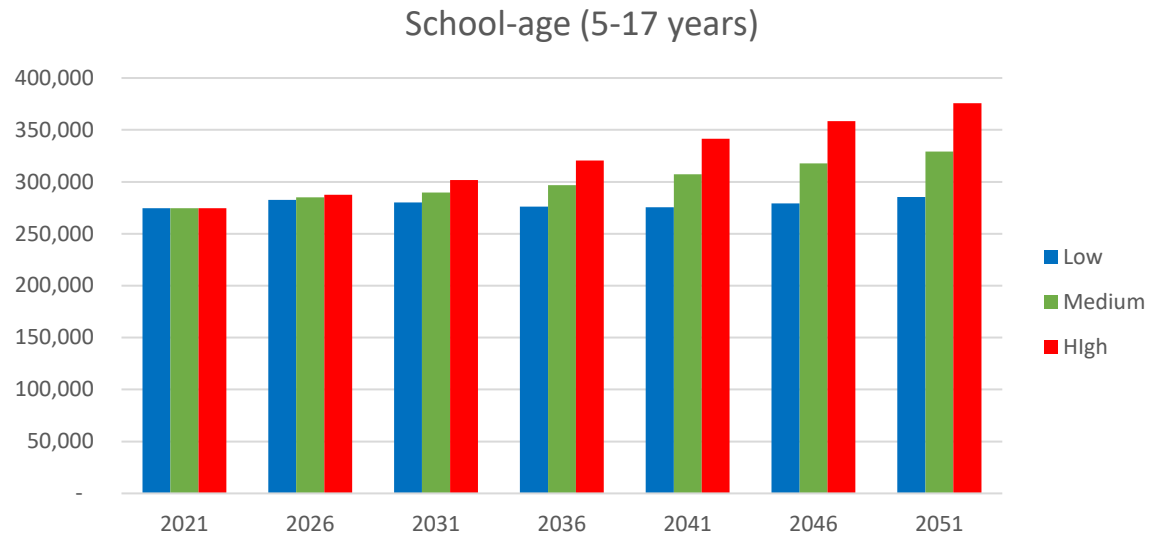
Figure 11: Projected young children (0-4 years) population, South Australia, 2021-51



School-age, 5-17 years

The Medium series projects school-age numbers will increase by around 54,500 to 329,300 over 30 years to 2051 (Figure 12). The high series projects a significantly greater increase of 101,000 to reach 375,700 by 2051. This increase is driven by higher levels of overseas migration resulting in more families with school-age children.

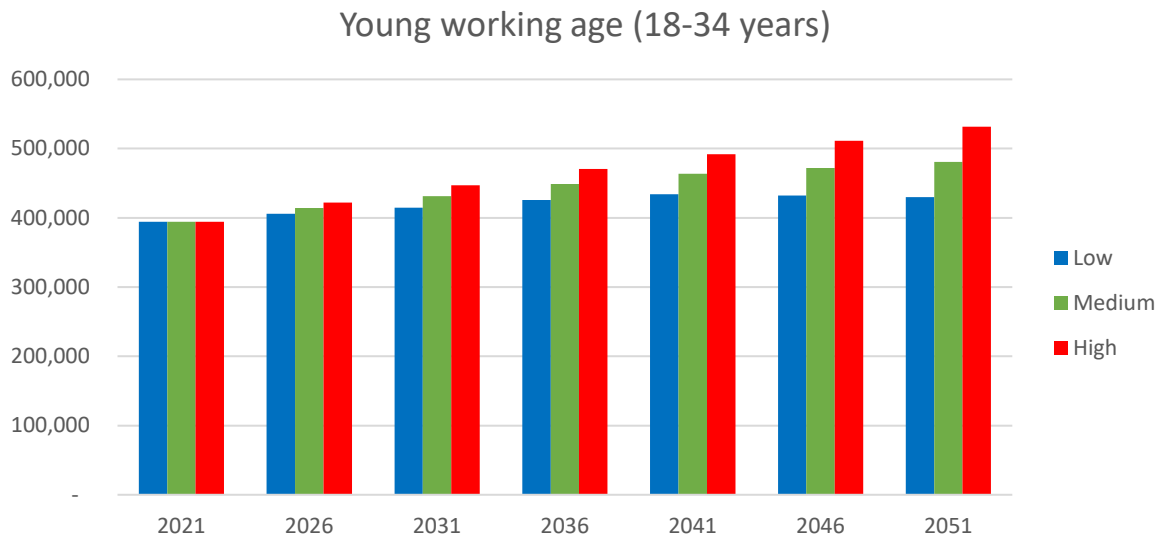
Figure 12: Projected school-age (5-17 years) population, South Australia, 2021-51



Young working-age, 18-34 years

The young working-age population in South Australia is projected to grow by around 95,400 for the Medium series and by 134,000 for the high over the period 2021-2051 (Figure 13). The projected growth rates for this cohort are relatively Low because it is this group that is most affected by migration losses to interstate and overseas destinations. This trend is assumed to continue throughout the projection period for the Low and Medium series, however the high series has assumed that recent net interstate migration gains will continue.

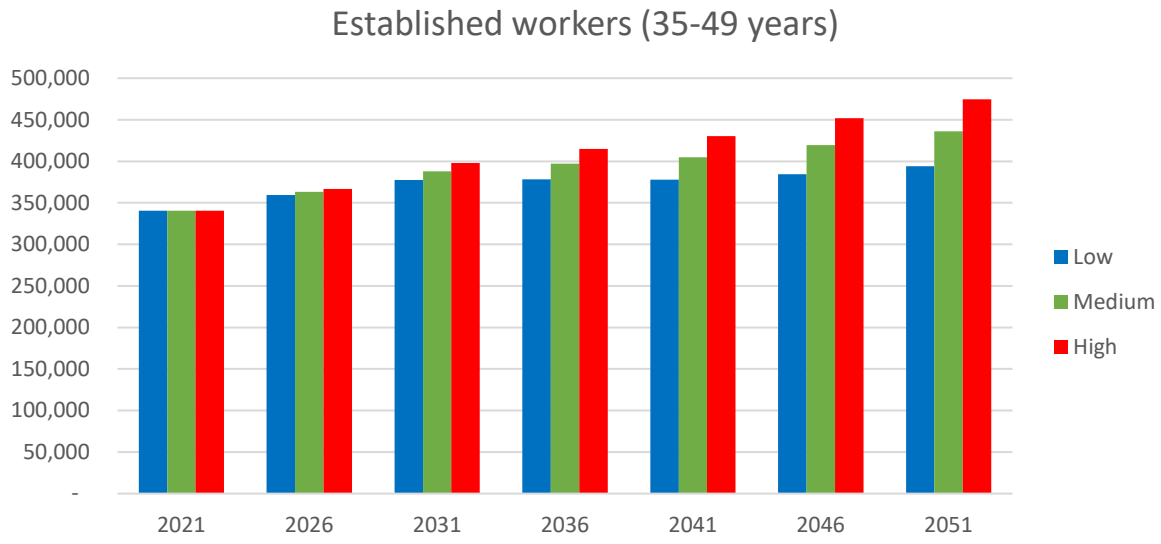
Figure 13: Projected young working-age (18-34 years) population, South Australia, 2021-51



Established workers, 35-49 years

The 'established workers' age cohort is projected to grow by around 95,400 for the medium scenario and by 134,000 for the high over the period 2021-2051 (Figure 14). The projected growth rates for this cohort are relatively high, as this group includes skilled migrants that move to Australia for employment opportunities.

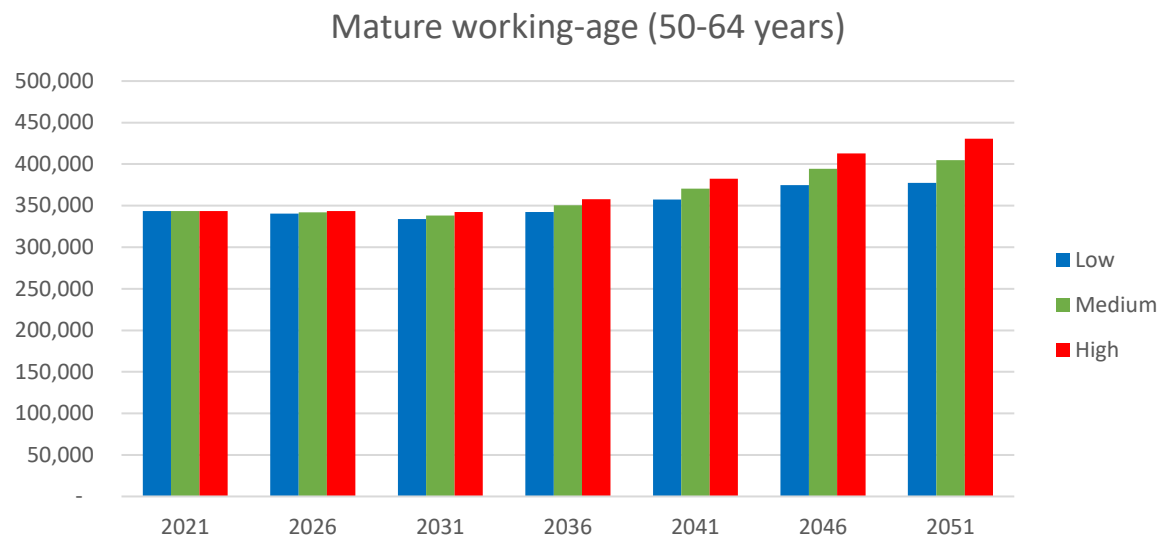
Figure 14: Projected older working-age (35-64 years) population, South Australia, 2021-51



Mature working-age, 50-64 years

The mature working-age population in South Australia is projected to grow by around 61,300 for the medium scenario, to reach 430,500 by 2051. For the high scenario, this growth is projected to be almost 87,000 over the period 2021-2051 (Figure 15)

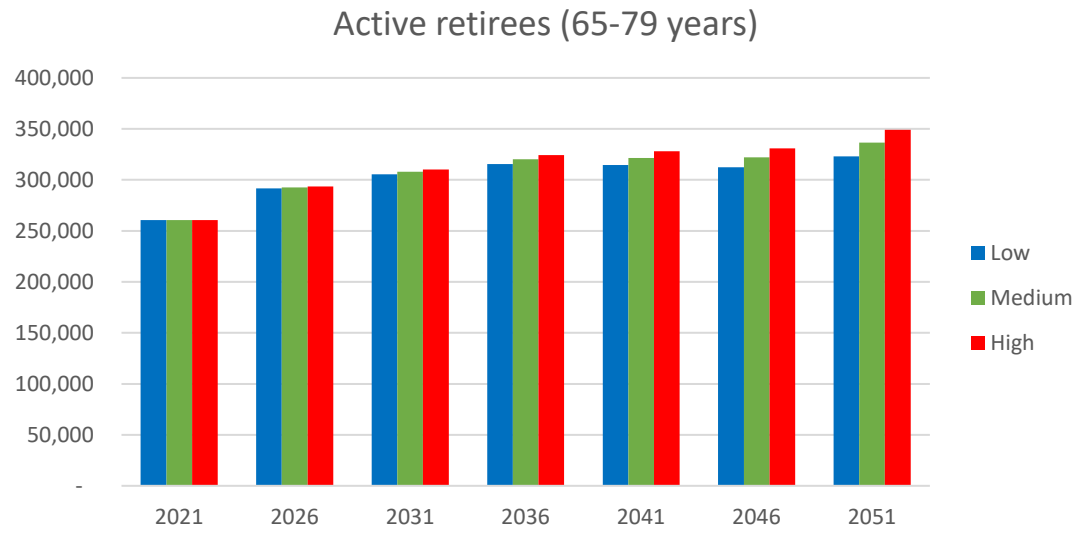
Figure 15: Projected older working-age (35-64 years) population, South Australia, 2021-51



Active retirees, 65-79 years

Figure 16 shows that the number of 'active retirees' will increase from around 260,400 in 2021 to 336,600 (medium scenario) and only slightly more to 349,150 (high) by 2051. The increase will be most dramatic between 2021 and 2026 as the large baby-boomer cohort reaches 65-79 years of age but is not yet affected by the higher mortality rates of old age.

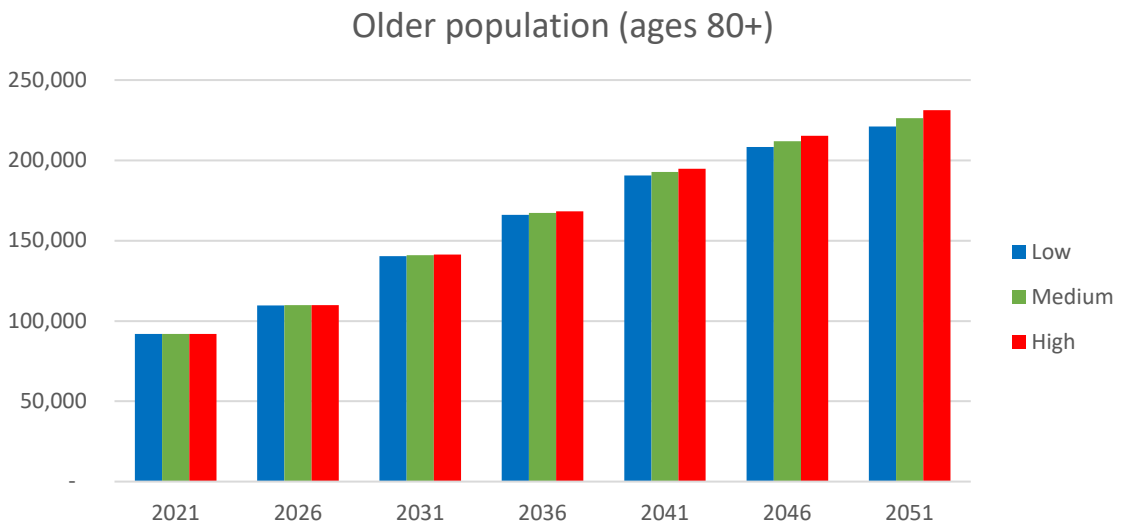
Figure 16: Projected active retirees (65-79 years) population, South Australia, 2021-51



Older population, 80+ years

After 2026 the more dependent 80+ age group is projected to increase more rapidly in size than the 65-79 age group (Figure 17). The size of this age cohort is essentially the same under all projections and is projected to increase by 146% from 92,000 in 2021 to 226,400 by 2051.

Figure 17: Projected older population (80+ years) population, South Australia, 2016-41



4.3 Greater Adelaide Planning Region (GAPR), 2021-2051

Region Summary

The Greater Adelaide Planning Region (GAPR) comprises ten sub-regions. Seven of these regions are within the Greater Adelaide Capital City statistical area (GACC) (also referred to as metropolitan Adelaide) (see Figure 1):

- Inner Metro
- Inner North
- Adelaide West
- Inner South
- Outer North
- Outer South
- Adelaide Hills

The three outer regions are:

- Fleurieu Peninsula
- Murray Bridge
- Northern Plains & Barossa

Projected Growth 2021 to 2051

Growth within the GAPR is largely driven by housing supply and employment opportunities. Housing supply is expected to be greatest within the GACC, due to its proximity to the CBD and employment opportunities. This region is expected to contain 88% of the GAPR growth over the next 30 years. Within the GACC, 75% of the growth is expected to occur within the Inner Metro, Adelaide West, Inner North and Outer North regions.

In 2021 the population of GAPR (refer to Figure 1) was 1.515 million and accounted for 84% of the total population of South Australia. By 2051 this share is projected to increase to around 86% (see Table 4).

For the medium projection, the population increases by 489,900 to 2.005 million by 2051. The annual growth rate peaks in 2021-31 at 1.22% and then declines to around 0.8% in 2041-51.

For the high projection, the population increases by 672,400 to 2.188 million by 2051. The annual growth rate peaks in 2021-31 at 1.55% and then declines to around 1.1% in 2041-51.

For the low projection, the population increases by 304,500 to 1.82 million by 2051. The annual growth rate peaks in 2021-2031 at 0.89% before decreasing to 0.44% in 2041-51.

Table 4: Projected Population, Greater Adelaide Planning Region, 2021-2051

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	1,515,491	**1,515,491**	1,515,491
2036	1,699,974	**1,781,920**	1,863,510
2051	1,820,012	**2,005,404**	2,187,885
2021-2051	304,521	**489,913**	672,394
Average annual change			
2021-2051	10,151	**16,330**	22,413
2021-2051 (%)	0.67	**1.08**	1.48

Figure 18: Projected Population, Greater Adelaide Planning Region, 2021-2051

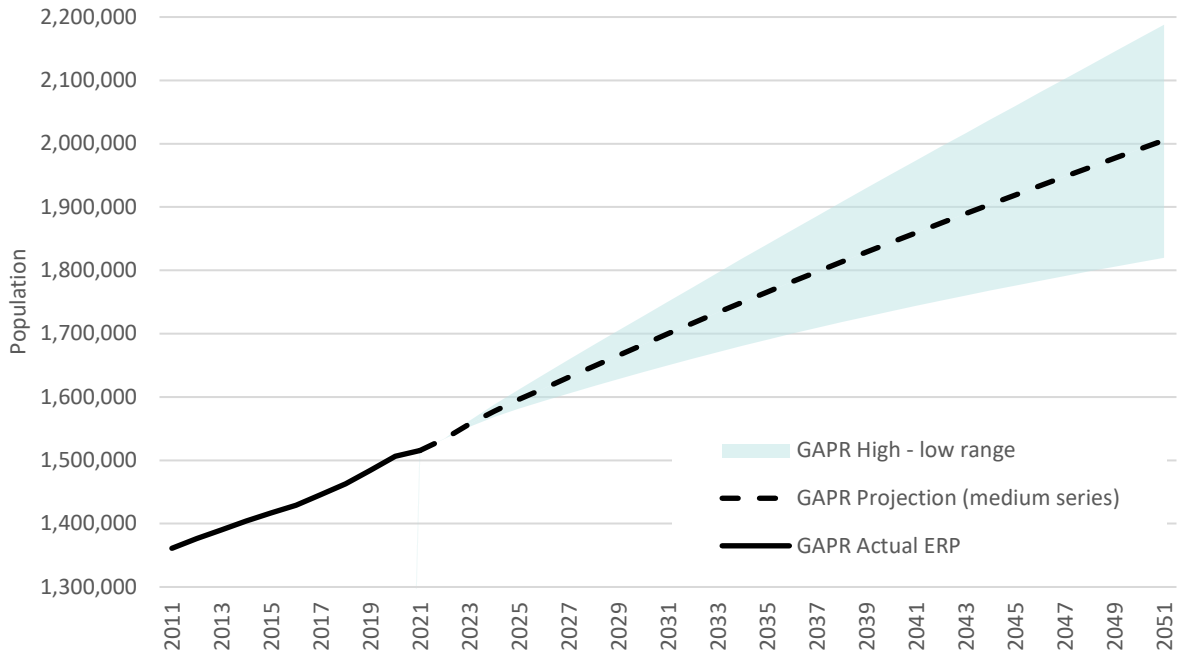
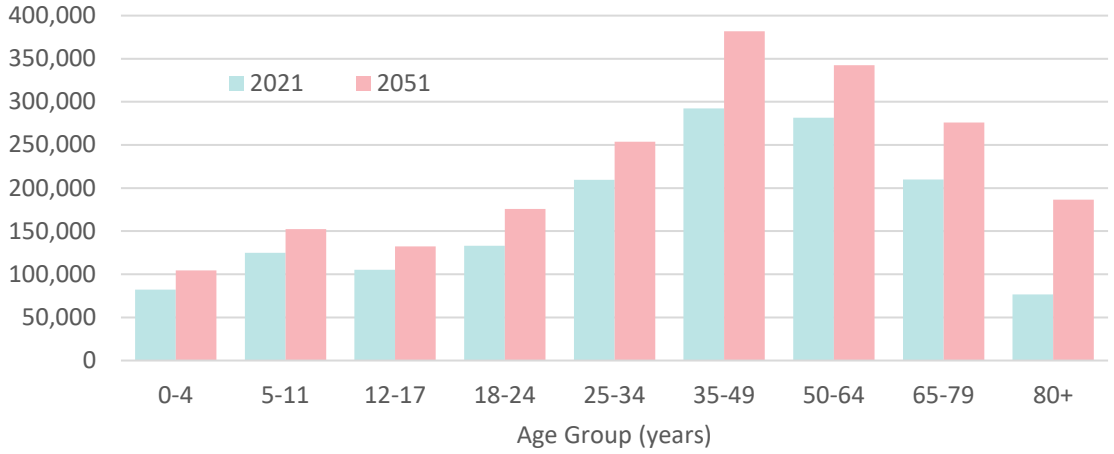


Figure 19: Population by service age group – medium series, Greater Adelaide Planning Region, 2021 vs 2051



4.4 Regional South Australia, 2021-2051

Region Summary

Projections have been prepared for the following regions:

- Eyre Peninsula and South West (excluding Whyalla)
- Whyalla
- Limestone Coast (excluding Mt Gambier & Grant)
- Mt Gambier & Grant
- Mid North
- Murray and Mallee (excluding Murray Bridge which has been included in Greater Adelaide)
- Outback North and East
- Yorke Peninsula
- Kangaroo Island

Projected Growth 2021 to 2051

- In 2021, the estimated residential population (ERP) was 287,700, accounting for 16% of the total population of South Australia.
- By 2051, projected growth of 41,700, to reach around 329,400 people, and accounting for around 14% of the total population.
- Average annual growth of 1,391 people, at a rate of 0.48%.
- Growth may increase across a range of 24,800 to 58,800 persons.

Table 5: Projected Population, Regional South Australia, 2021-2051

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	287,701	**287,701**	287,701
2036	300,623	**308,122**	316,302
2051	312,532	**329,428**	346,539
2021-2051	24,831	**41,727**	58,838
Average annual change			
2021-2051	828	**1,391**	1,961
2021-2051 (%)	0.29	**0.48**	0.68

Figure 20: Projected Population, Regional South Australia, 2021-2051

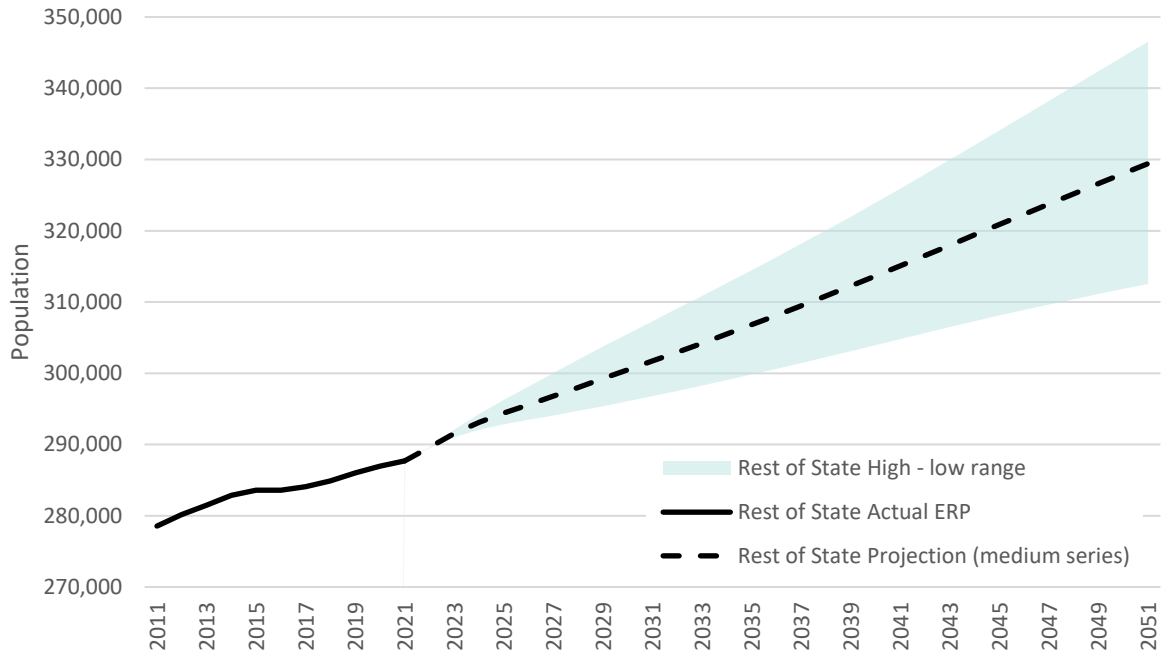
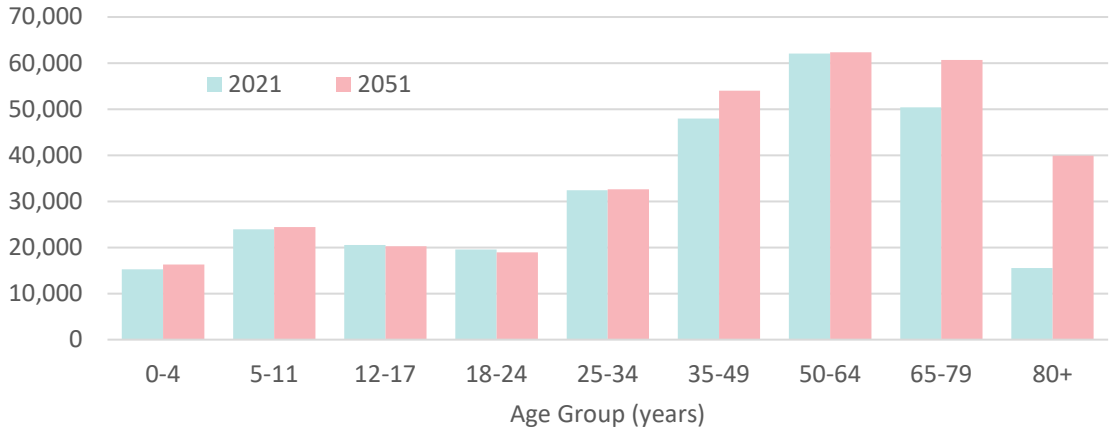


Figure 21: Population by service age group – medium series, Regional South Australia, 2021 vs 2051



5. PROJECTION RESULTS BY REGION, 2021-41

Population projections have been developed for 19 regions across South Australia for a 20-year period, from 2021 to 2041. The projection horizon for the regions is only 20 years due to the greater uncertainty around the future size and distribution of growth across South Australia.

Table 6 summarises the 2021 total population and 2041 projected population (medium series), and the average annual growth rate for each region.

Detailed summaries for each region are available in sections 5.1 to 5.19.

Table 6: Population Projection summary by Region, 2021-2041 (medium series)

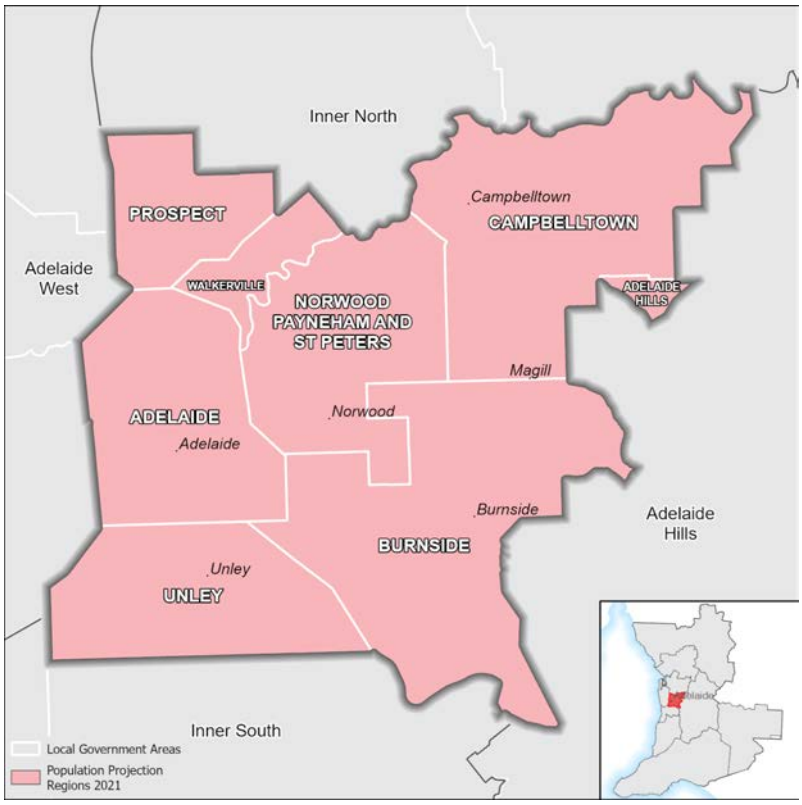
Regions	2021 population	2041 projection	Change 2021-2041	Ave. annual change	Ave. annual change (%)
Inner Metro	235,366	279,818	44,452	2,223	0.94
Adelaide West	247,123	290,478	43,355	2,168	0.88
Inner North	321,850	371,980	50,130	2,507	0.78
Outer North	139,452	229,115	89,663	4,483	3.21
Inner South	200,133	221,128	20,995	1,050	0.52
Outer South	177,968	205,055	27,087	1,354	0.76
Adelaide Hills	80,501	108,291	27,790	1,389	1.73
Murray Bridge	22,689	31,935	9,246	462	2.04
Northern Plains & Barossa	38,797	50,866	12,069	603	1.56
Fleurieu Peninsula	51,612	70,754	19,142	957	1.85
Greater Adelaide Total	**1,515,491**	**1,859,421**	**343,930**	**17,196**	**1.13%**
Kangaroo Island	4,999	6,001	1,002	50	1.00
Eyre Peninsula & South West	37,004	41,419	4,415	221	0.60
Whyalla	21,868	23,595	1,727	86	0.39
Limestone Coast	31,970	34,435	2,465	123	0.39
Mount Gambier	36,572	42,547	5,975	299	0.82
Mid North	41,287	42,729	1,442	72	0.17
Murray and Mallee	50,408	54,077	3,669	183	0.36
Outback North and East	26,714	26,929	215	11	0.04
Yorke Peninsula	36,879	43,344	6,465	323	0.88
Regional SA Total	**287,701**	**315,076**	**27,375**	**1,369**	**0.48%**
State Total	**1,803,192**	**2,174,497**	**371,305**	**18,565**	**1.03%**

5.1 Inner Metro

Region Summary

This region includes the Adelaide CBD, and immediately surrounding councils to the north, south and east.

In 2021, the population in the region was 235,366. Major infill developments and the construction of numerous residential apartments have seen the population increase by almost 11,000 between 2016 and 2021.



Continued infill development is expected, particularly within Prospect, Campbelltown and Norwood, Payneham and St Peters councils. The CBD contains significant growth opportunities in the form of apartment developments. Urban Corridors along Prospect and Churchill Roads and along Unley and Greenhill Roads contain potential for apartment and townhouse developments at medium to high density. Within the Unley, Burnside, Walkerville and Norwood Payneham and St. Peters council areas, growth opportunities are limited due to heritage and other constraints.

Projected Growth 2021 to 2041

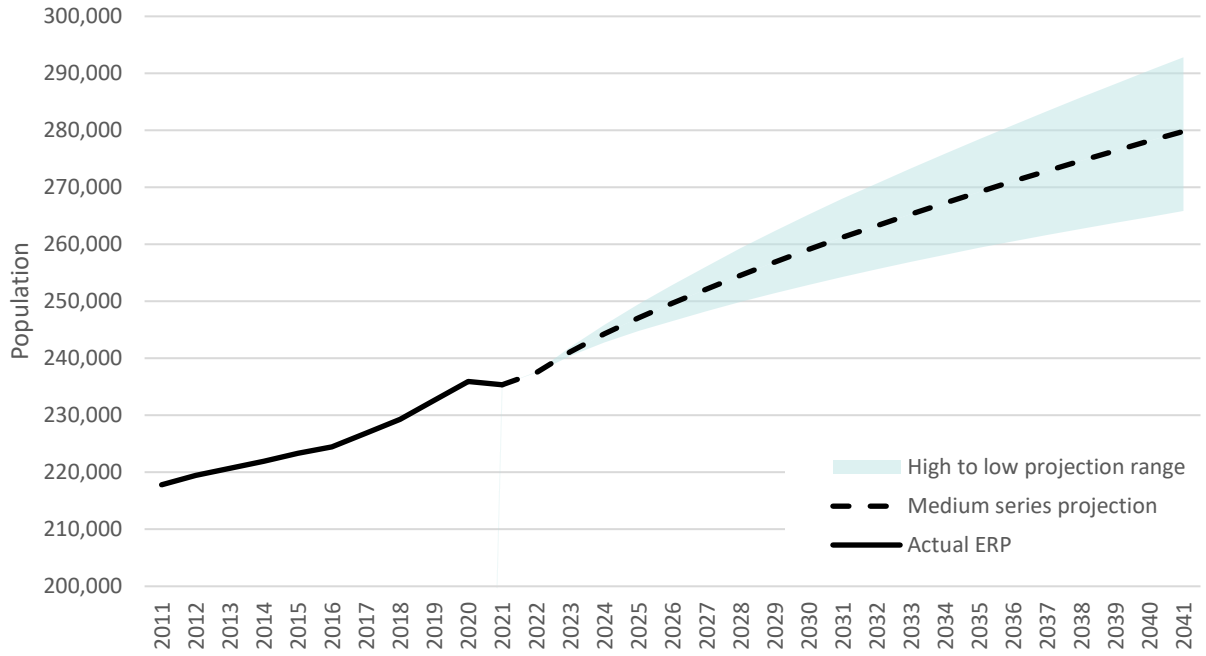
Table 7 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 7: Projected Population, Inner Metro Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	235,366	235,366	235,366
2041	265,872	279,818	292,821
2021-2041	30,506	44,452	57,455
Average annual change			
2021-2041	1,525	2,223	2,873
2021-2041 (%)	0.65	0.94	1.22

Figure 22 charts the medium population projection (dashed line) and the high – low projection range over the next 20 years. To provide context, the chart also shows the actual population growth for this region from 2011-21.

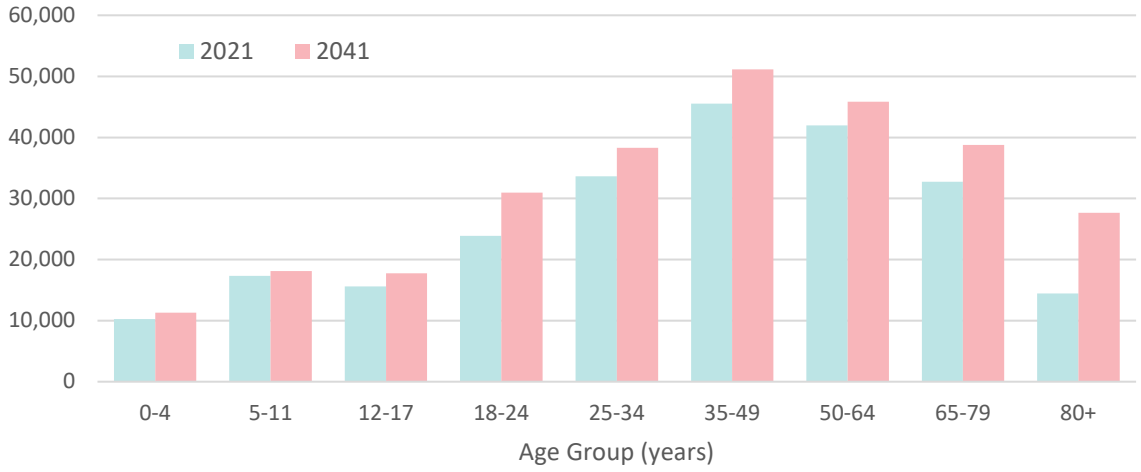
Figure 22: Projected Population, Inner Metro Planning Region, 2021-2041



Age Profile

Growth is projected across all age groups. It is projected that 18-24 cohort will increase by 30%, while the 80+ cohort is projected to almost double over the next 20 years.

Figure 23: Population by service age group – medium series, Inner Metro Region, 2021 vs 2041



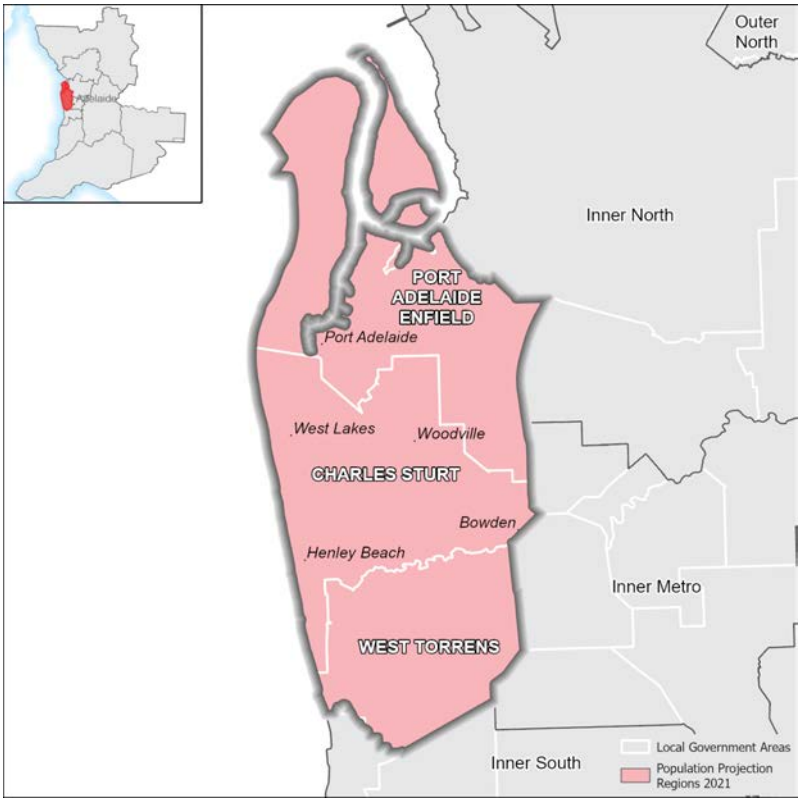
5.2 Adelaide West

Region Summary

This region sits immediately to the west of the Adelaide CBD. It includes Port Adelaide, West Lakes, Plympton and the Adelaide Airport. There are numerous employment activity areas throughout the region.

In 2021, the population in the region was 247,123, making it the second largest region within Greater Adelaide. Major infill developments within Port Adelaide and West Lakes, as well as corridor developments along Anzac Highway have seen the population increase by over 13,000 between 2016 and 2021.

The region has good connectivity to the CBD, with Port Road, Anzac Highway, and rail access (both tram and train).



Growth opportunities within this region include major infill along the Anzac Highway Urban Corridor Zone, within Port Adelaide, at West Lakes and on the city fringe in areas such as Bowden. There are also general infill opportunities, particularly within Seaton and Plympton.

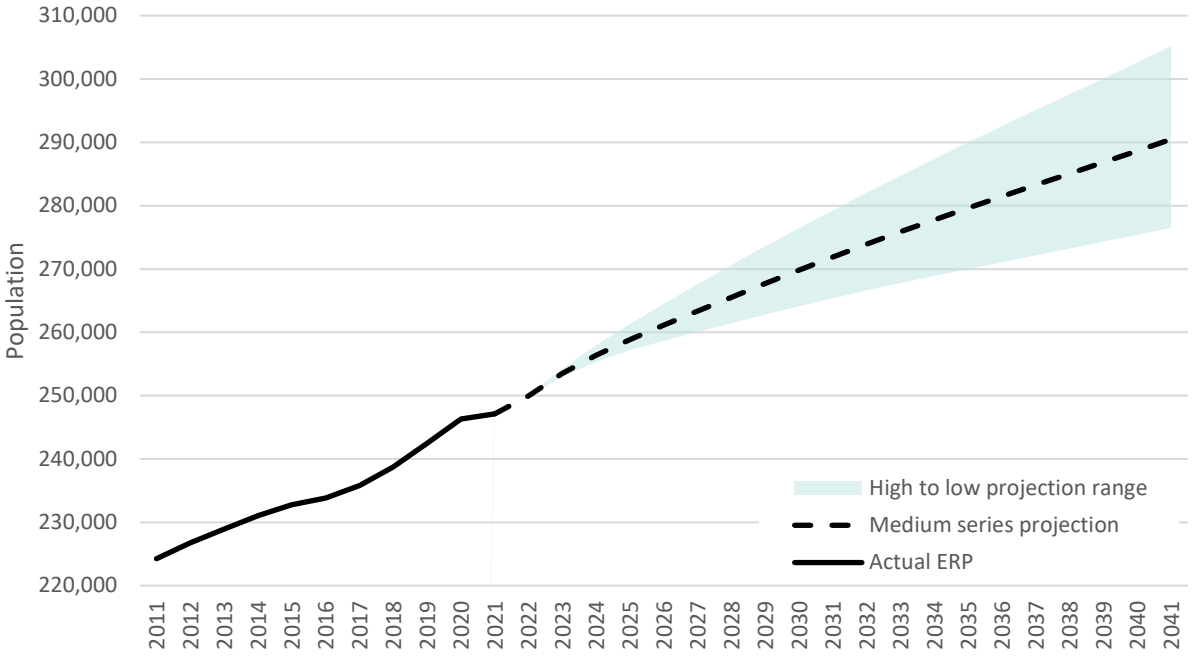
Projected Growth 2021 to 2041

Table 8 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 8: Projected Population, Adelaide West Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	247,123	247,123	247,123
2041	276,475	290,478	305,161
2021-2041	29,352	43,355	58,038
Average annual change			
2021-2041	1,468	2,168	2,902
2021-2041 (%)	0.59	0.88	1.17

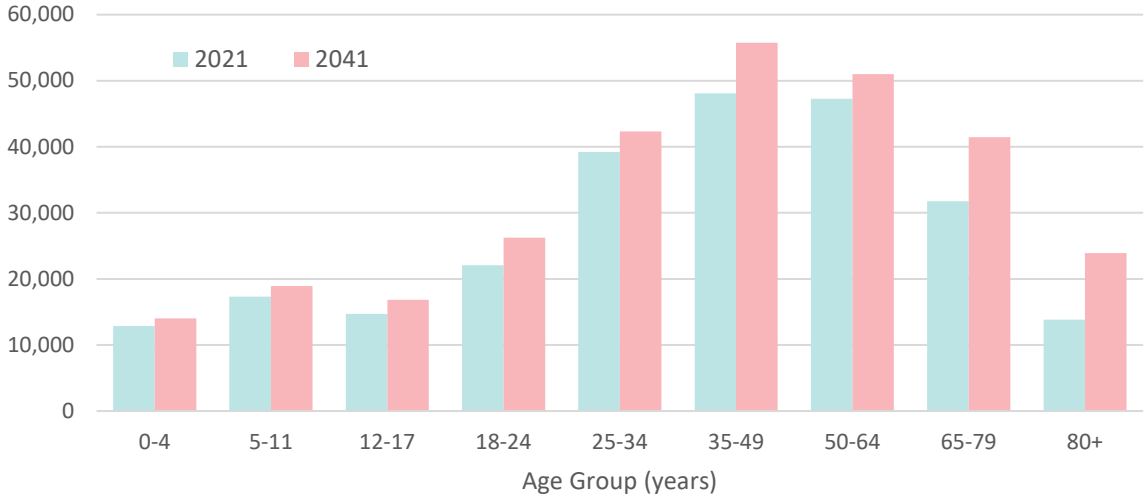
Figure 24: Projected Population, Adelaide West Region, 2021-2041



Age Profile

Growth is expected across all age groups. The 18-24 cohort is projected to increase by 19%, while 80+ population is projected to increase by 73% over the next 20 years.

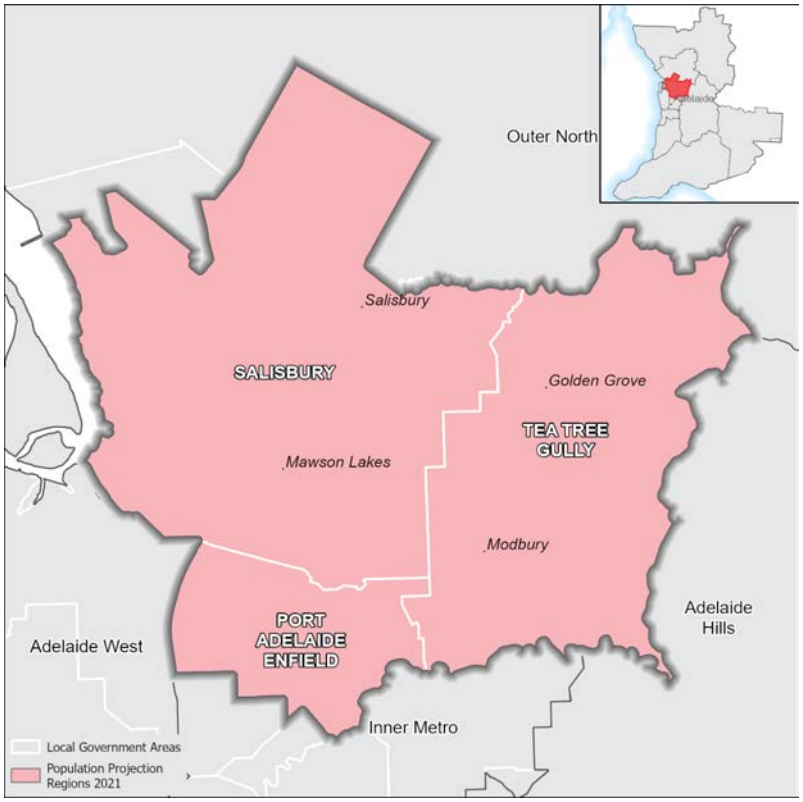
Figure 25: Population by service age group – medium series, Adelaide West Region, 2021 vs 2041



5.3 Inner North

Region Summary

The Inner North region includes Salisbury, Tea Tree Gully and the eastern part of Port Adelaide Enfield councils. Parafield Airport is central to this region, which contains numerous employment areas. Mawson Lakes, Salisbury and Tea Tree Plaza shopping centres service the community.



This is the largest region within Greater Adelaide, and in 2021 had a population of 321,850. Infill developments throughout the region have seen the population increase by over 18,000 between 2016 and 2021.

Within this region is the growth front of Dry Creek. There are also many opportunities for infill development. Much of this region was developed between 1960-1980, making it prime for redevelopment. The area has good linkage with the CBD through the O'Bahn bus line that servicing the north-east.

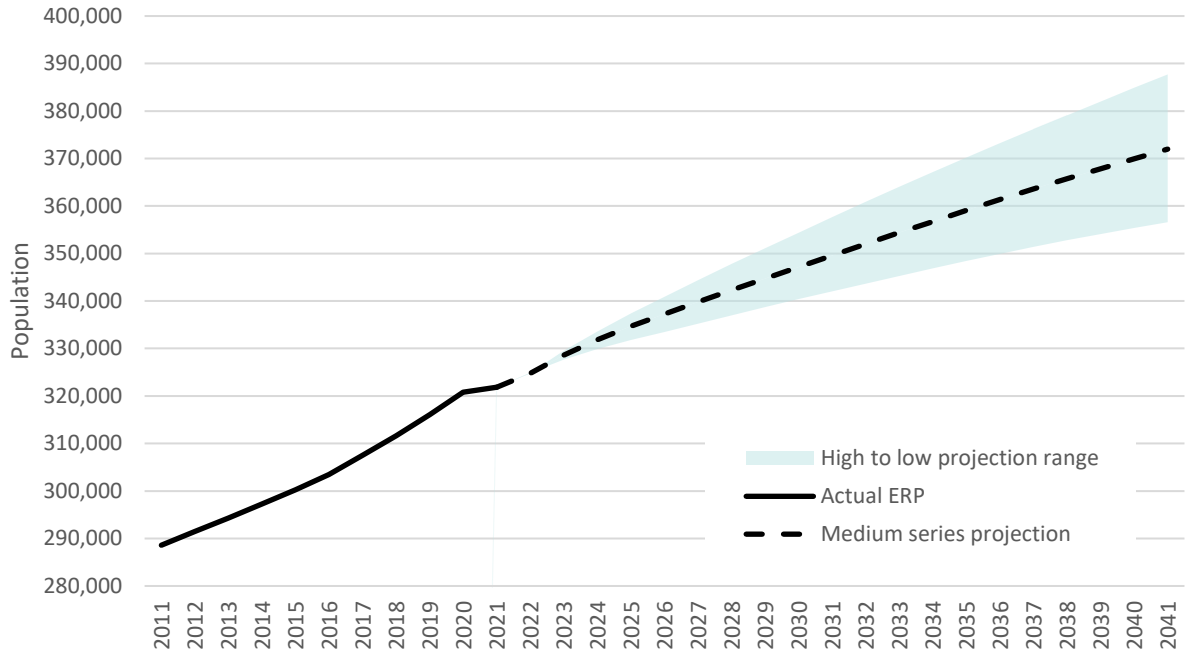
Projected Growth 2021 to 2041

Table 9 summarises the projected population for the region from 2021 to 2041 for low, medium and high growth scenarios.

Table 9: Projected Population, Inner North Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	321,850	321,850	321,850
2041	356,608	371,980	387,706
2021-2041	34,758	50,130	65,856
Average annual change			
2021-2041	1,738	2,507	3,293
2021-2041 (%)	0.54	0.78	1.02

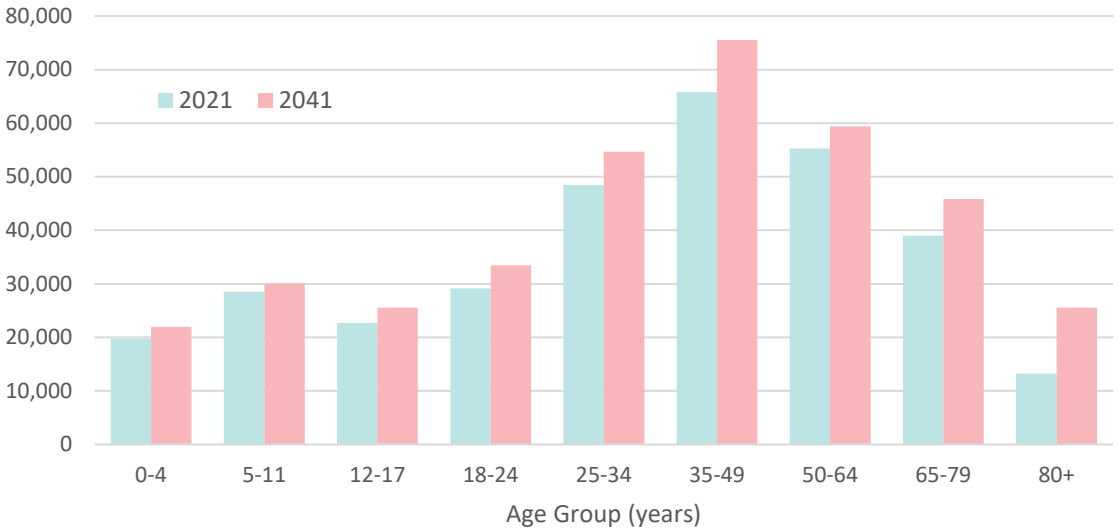
Figure 26: Projected Population, Inner North Region, 2021-2041



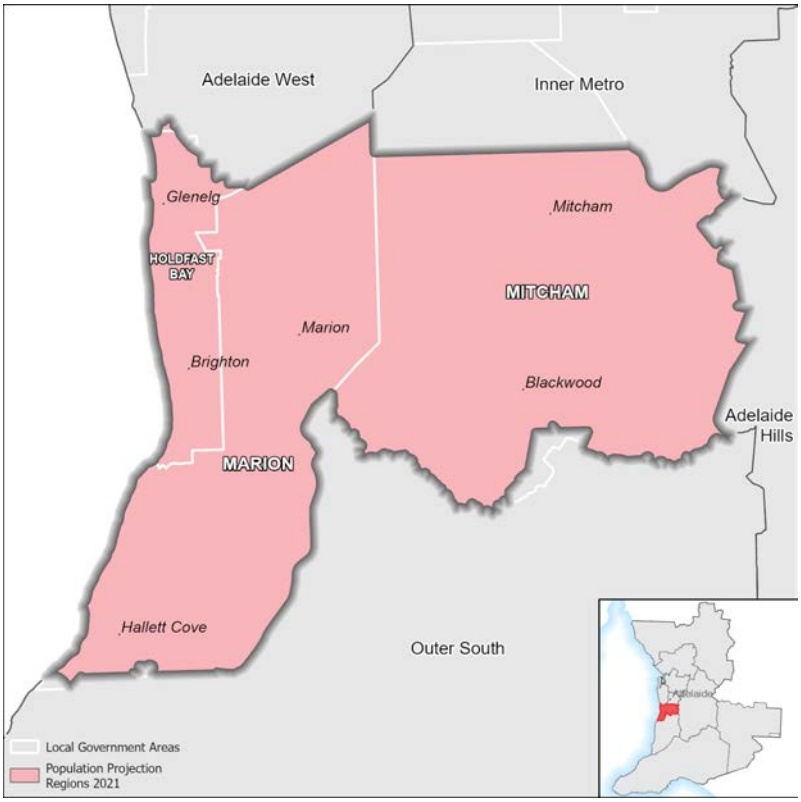
Age Profile

Growth is projected across all age groups. The population aged over 80 is projected to increase by 93%. There is a healthy supply of working age population to offset the aging population.

Figure 27: Population by service age group – medium series, Inner North Region, 2021 vs 2041



5.4 Inner South



Region Summary

This region sits to the south of the CBD. It has significant retail and commercial centres, including Marion shopping centre and Glenelg; health and education at Bedford Park (Flinders University / Flinders Medical Centre).

In 2021 the region's population was 200,133. The Tonsley Park redevelopment along with general infill opportunities throughout the region have seen the population increase by over 8,000 between 2016 and 2021.

The region has good connectivity to the CBD with the tram from Glenelg to the City, and several train lines.

Development at Morphettville racecourse, Tonsley, Glenelg and Oaklands Park will supply some growth opportunities. General infill is expected to continue throughout the region, however much of the ready potential has already been consumed, so it is expected that rates of development may slow.

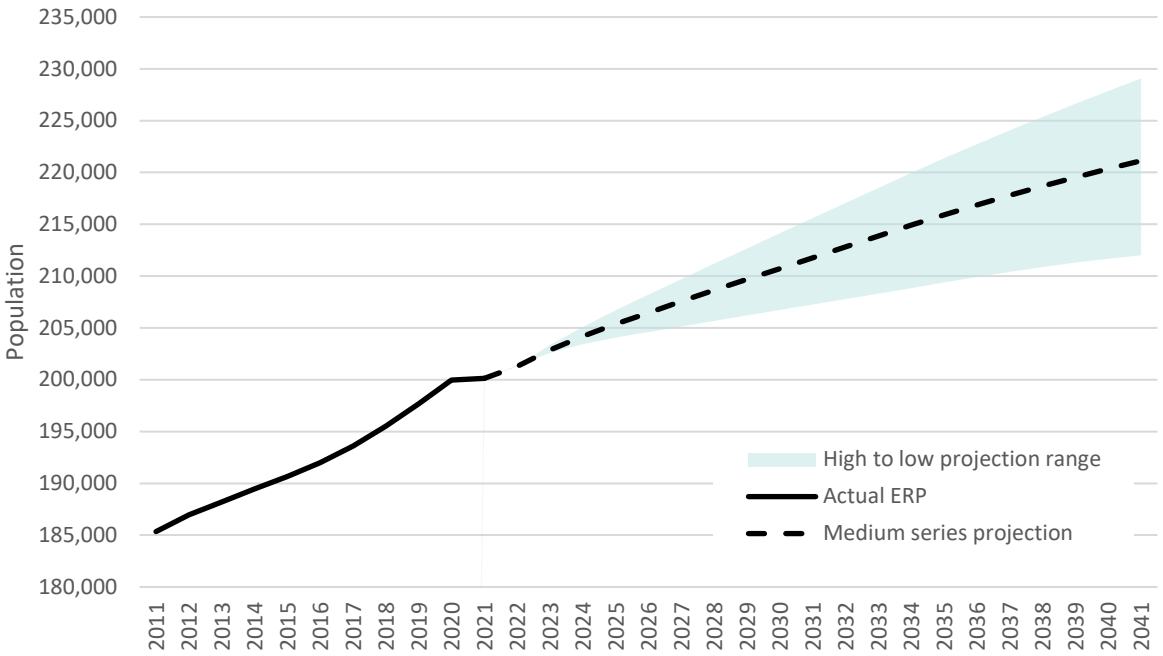
Projected Growth 2021 to 2041

Table 10 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 10: Projected Population, Inner South Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	200,133	200,133	200,133
2041	212,003	221,128	229,079
2021-2041	11,870	20,995	28,946
Average annual change			
2021-2041	594	1,050	1,447
2021-2041 (%)	0.30	0.52	0.72

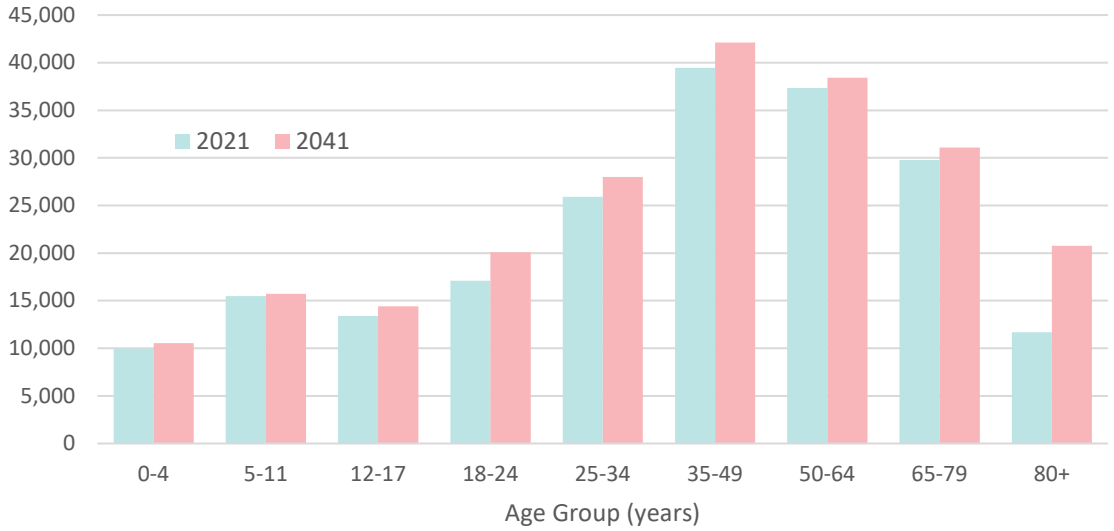
Figure 28: Projected Population, Inner South Region, 2021-2041



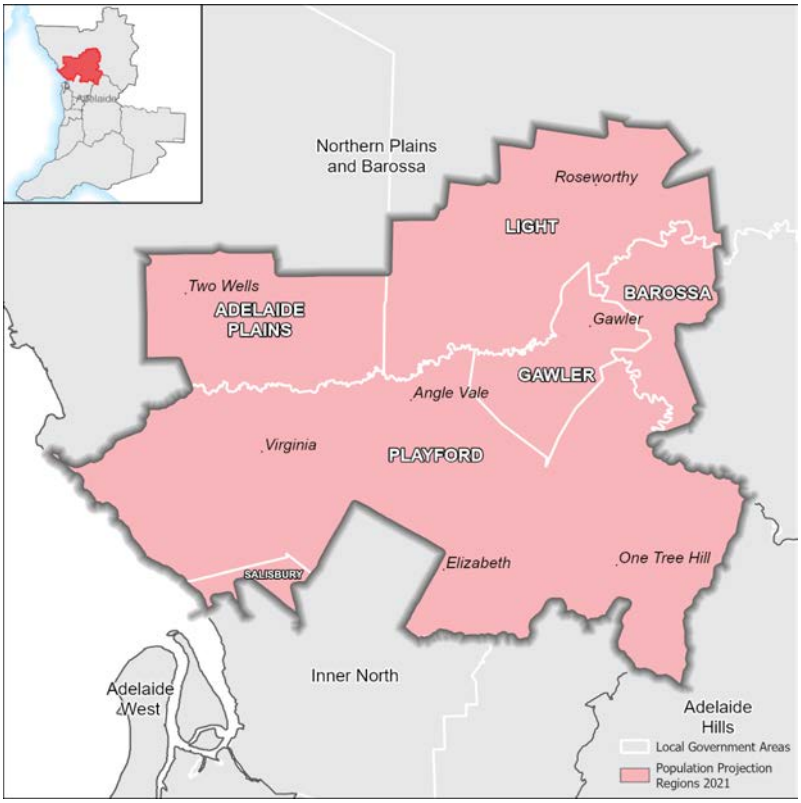
Age Profile

Some growth is projected across all age groups. The population aged over 80 is projected to increase by 78%.

Figure 29: Population by service age group – medium series, Inner South Region, 2021 vs 2041



5.5 Outer North



Region Summary

This region includes Gawler, Elizabeth, Two Wells, Angle Vale, Riverlea Park, Roseworthy and Concordia.

The area has the greatest stock of greenfield land as well as substantial horticulture areas.

In 2021 the region had a population of 139,452. It is one of the fastest growing regions, increasing by 10% over the past 5 years, with an additional 13,000 people. This growth has been largely driven by multiple greenfield development fronts.

The area has significant retail and commercial centres (Elizabeth, Munno Para, Gawler); health precinct (Lyell McEwin Hospital, Elizabeth); industrial employment zoned (Elizabeth, Edinburgh); Defence (RAAF base at Edinburgh); and is a rich agricultural region (Virginia, Roseworthy).

Numerous greenfield growth fronts within the region, including Riverlea Park, Angle Vale, Gawler East, Roseworthy, Two Wells, Munno Para and Blakeview, will support growth in the region. Infill opportunities exist around Elizabeth centre and renewal opportunities in Davoren Park and Elizabeth.

The region is serviced by rail and good road networks including the north-south motorway.

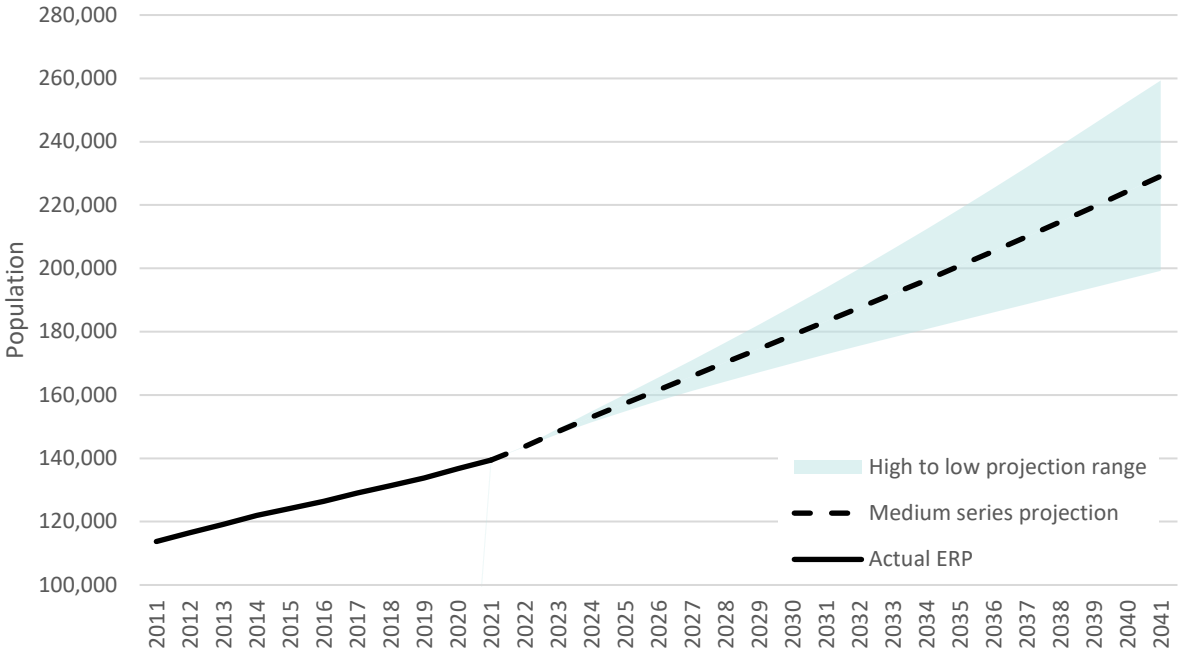
Projected Growth 2021 to 2041

Table 11 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 11: Projected Population, Outer North Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	139,452	139,452	139,452
2041	199,197	229,115	259,333
2021-2041	59,745	89,663	119,881
Average annual change			
2021-2041	2,987	4,483	5,994
2021-2041 (%)	2.14	3.21	4.30

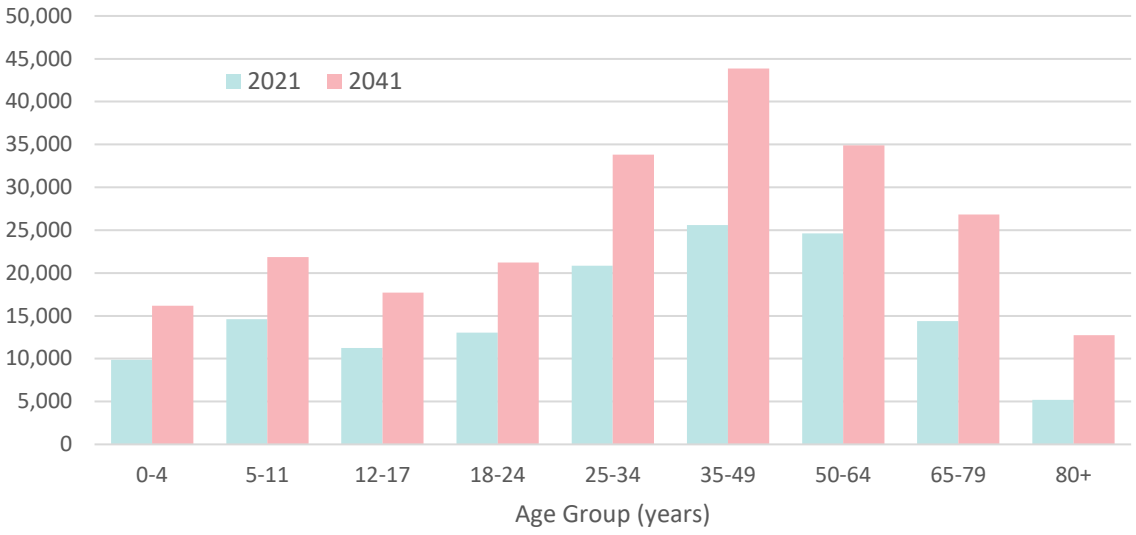
Figure 30: Projected Population, Outer North Region, 2021-2041



Age Profile

Significant growth is projected across all age groups within the region. Established workers and those aged 65+ are projected to experience the greatest increases.

Figure 31: Population by service age group – medium series, Outer North Region, 2021 vs 2041



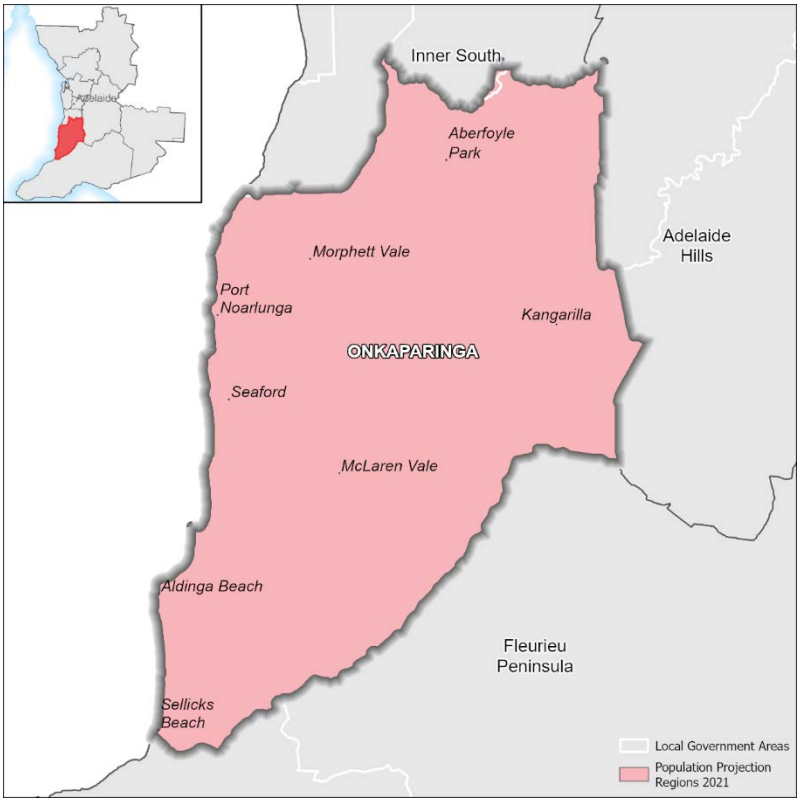
5.6 Outer South

Region Summary

This region is topographically constrained by the coastline to the west and the hills to the east. The McLaren Vale Wine Region and Character Preservation District covers much of the south east of the region, restricting opportunities for future residential development.

In 2021 the region had a population of 177,968. Multiple greenfield development fronts, along with infill developments throughout the region have seen the population increase by around 7,300 between 2016 and 2021.

Serviced by a train to Seaford, along with the Southern expressway and proposed completion of the north-south corridor, the region is well connected to the CBD.



Additional Greenfield growth opportunities have recently been released at Aldinga and Hackham, and early investigations have commenced at Sellicks Beach. The identified greenfield land supply in this area is estimated to last around 10 years. Infill opportunities surround Noarlunga Centre, and numerous general infill opportunities throughout, particularly within Morphett Vale, Christies Beach, Christie Downs and Hackham.

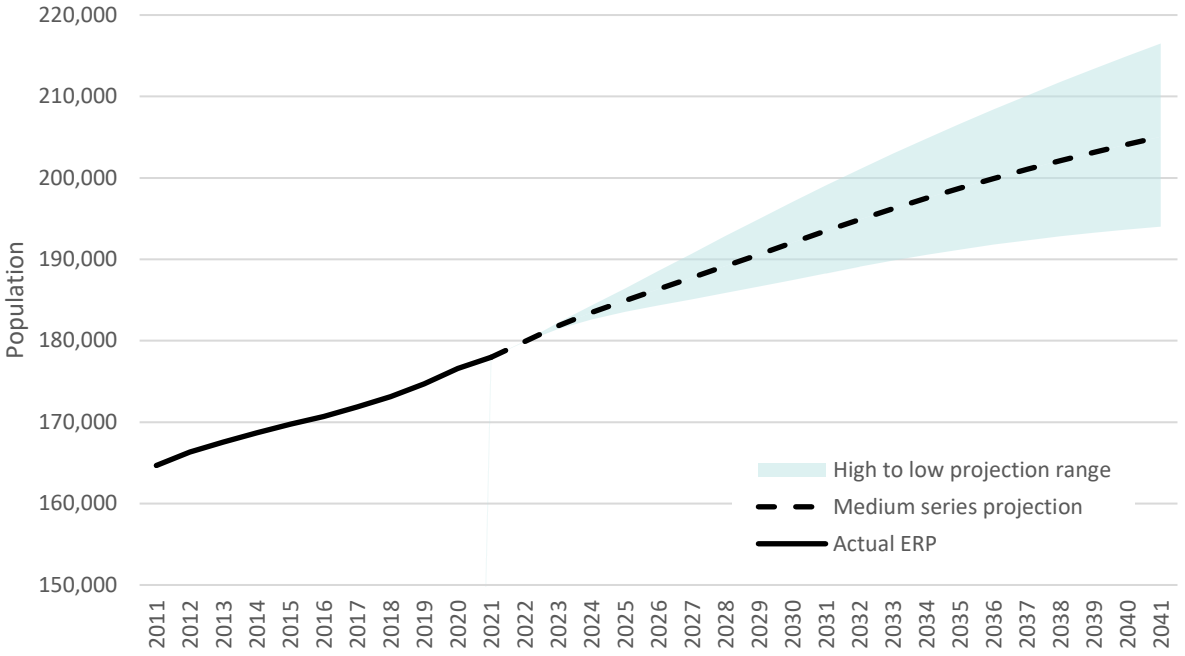
Projected Growth 2021 to 2041

Table 12 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 12: Projected Population, Outer South Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	177,968	177,968	177,968
2041	194,018	205,055	216,505
2021-2041	16,050	27,087	38,537
Average annual change			
2021-2041	803	1,354	1,927
2021-2041 (%)	0.45	0.76	1.08

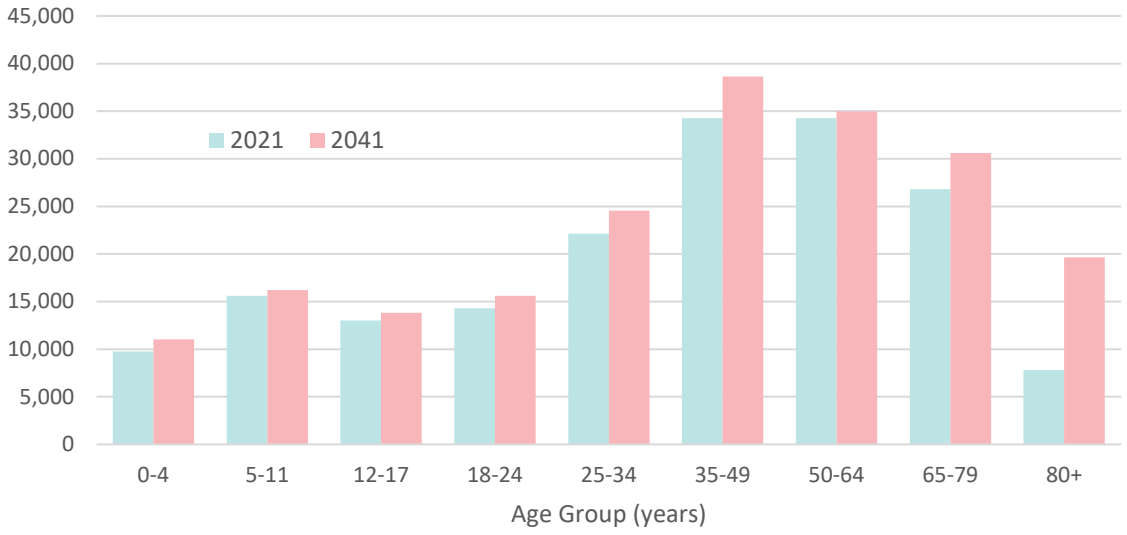
Figure 32: Projected Population, Outer South Region, 2021-2041



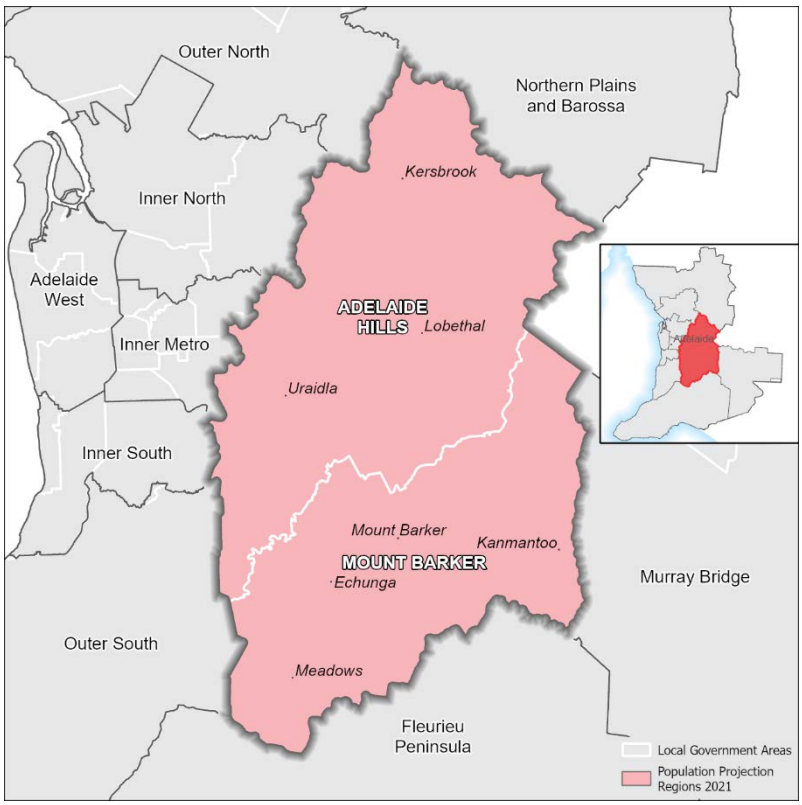
Age Profile

Growth is projected across all age groups. The population aged over 80 will experience the greatest growth, increasing by 150%.

Figure 33: Population by service age group – medium series, Outer South Region, 2021 vs 2041



5.7 Adelaide Hills



Region Summary

The region includes Mount Barker and Adelaide Hills councils.

In 2021 the region had a population of 80,501. Greenfield development surrounding Mount Barker has contributed to much of this growth, with 7,337 additional people between 2016 and 2021.

Mount Barker greenfield growth continues to be the major contributor to growth in the region. Smaller opportunities are scattered across the numerous townships throughout the region, however growth opportunities beyond township boundaries are limited due to the Environment and Food Protection Area that covers much of the region.

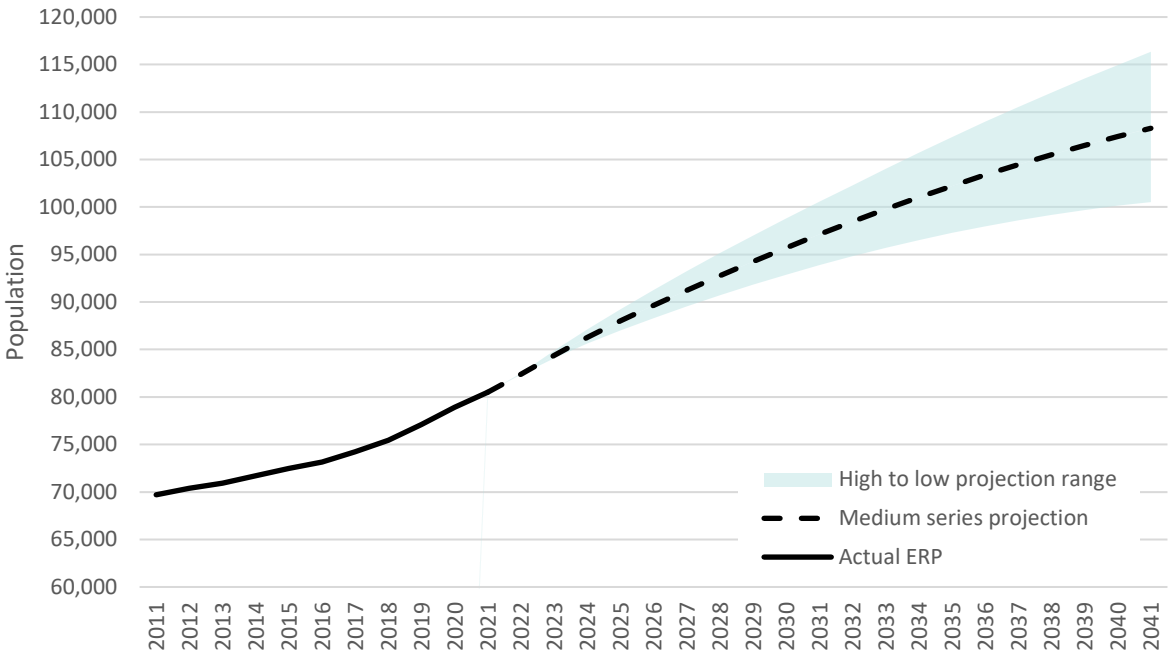
Projected Growth 2021 to 2041

Table 13 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 13: Projected Population, Adelaide Hills Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	80,501	80,501	80,501
2041	100,520	108,291	116,346
2021-2041	20,019	27,790	35,845
Average annual change			
2021-2041	1,001	1,389	1,792
2021-2041 (%)	1.24	1.73	2.23

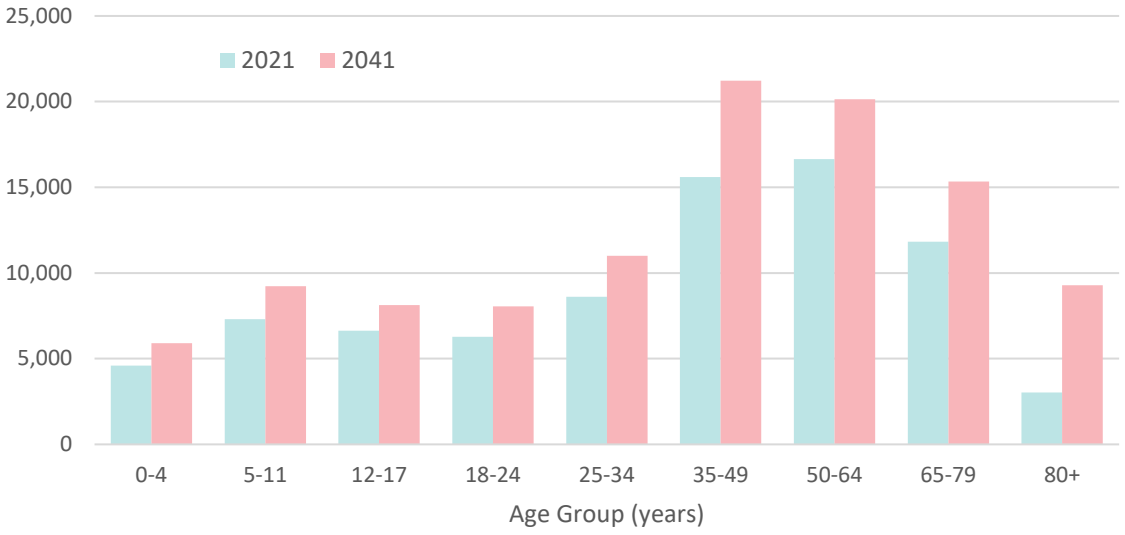
Figure 34: Projected Population, Adelaide Hills Region, 2021-2041



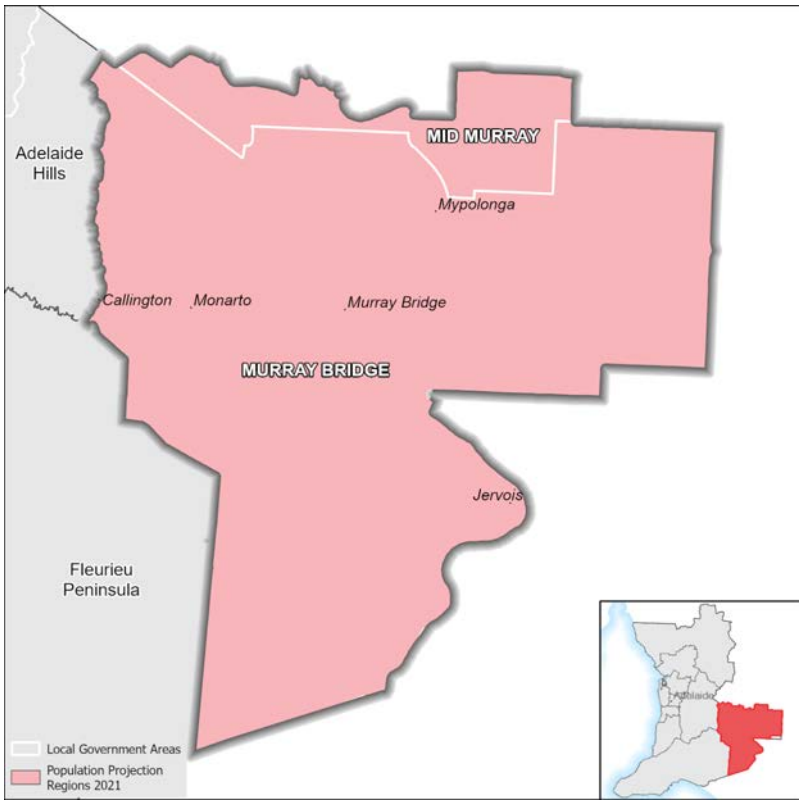
Age Profile

Growth is projected across all age groups. The population aged over 80 years is projected to triple over the next 20 years.

Figure 35: Population by service age group – medium series, Adelaide Hills Region, 2021 vs 2041



5.8 Murray Bridge



Region Summary

The region includes the city of Murray Bridge, Monarto and several smaller towns on the River Murray.

In 2021 the region had a population of 22,689. Since 2016, the population has increased by just 777 people.

The town of Murray Bridge has ample land for expansion, both within the built-up area and at Gifford Hill. Furthermore, a Code Amendment seeks to unlock three key parcels of land to the south-west of the city, totalling 113 hectares, to allow housing development and accommodate future population growth in the area.

Job opportunities and demand for housing in Murray Bridge and the surrounding areas will be increased with Thomas Foods International scheduled to open a new upgraded meat processing facility by the end of 2023, with further expansions to follow.

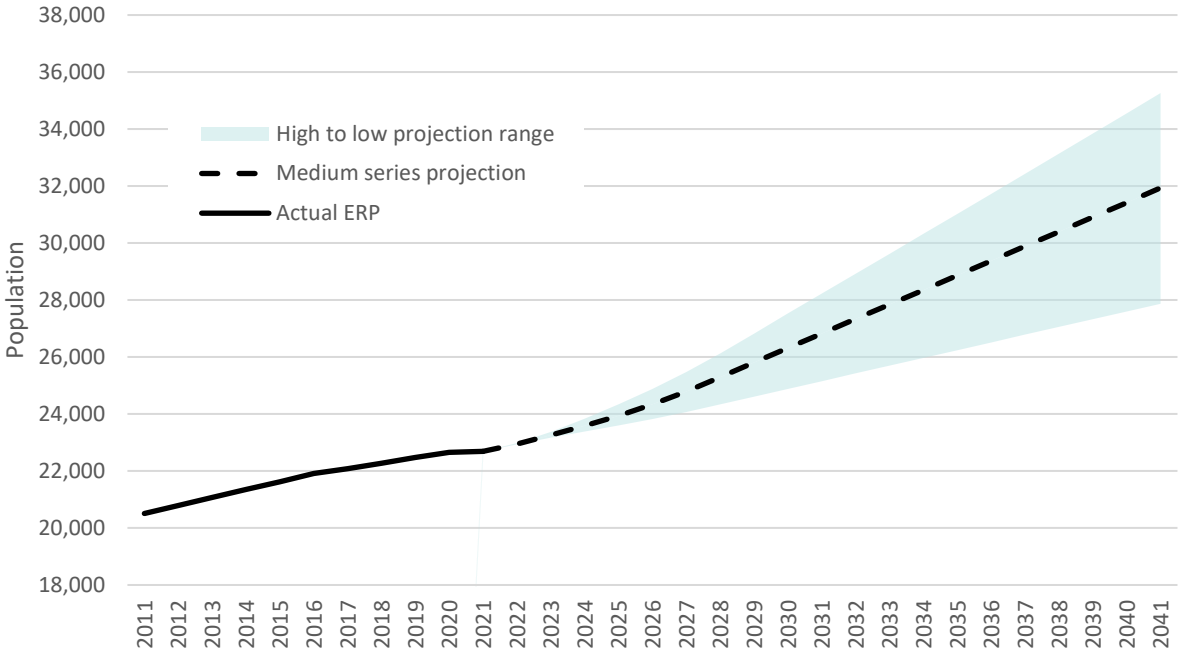
Projected Growth 2021 to 2041

Table 14 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 14: Projected Population, Murray Bridge Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	22,689	22,689	22,689
2041	27,869	31,935	35,262
2021-2041	5,180	9,246	12,573
Average annual change			
2021-2041	259	462	629
2021-2041 (%)	1.14	2.04	2.77

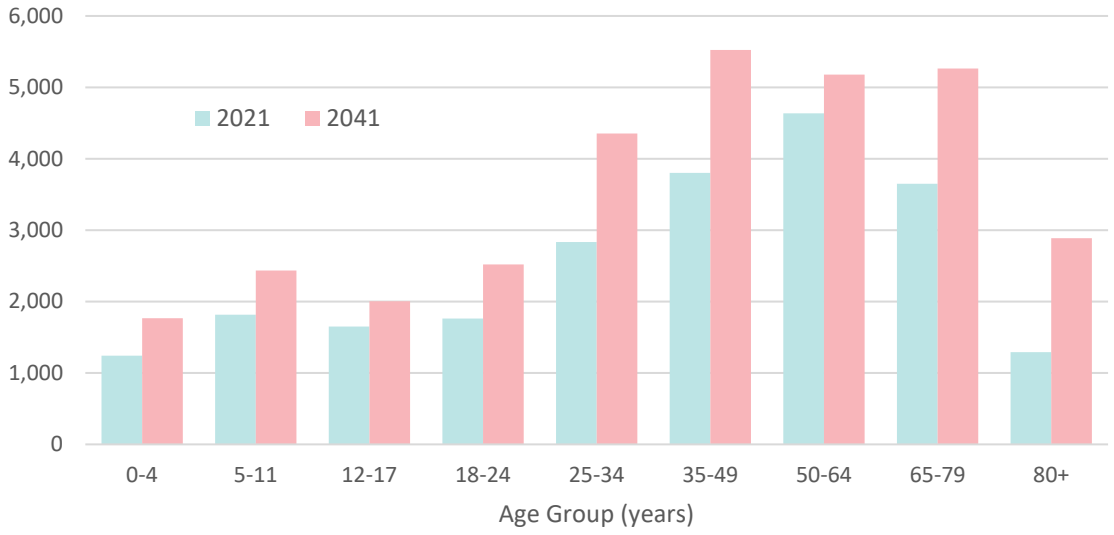
Figure 36: Projected Population, Murray Bridge Region, 2021-2041



Age Profile

Growth is projected across all age groups. The working age population is projected to increase significantly as job opportunities continue within the region.

Figure 37: Population by service age group – medium series, Murray Bridge Region, 2021 vs 2041

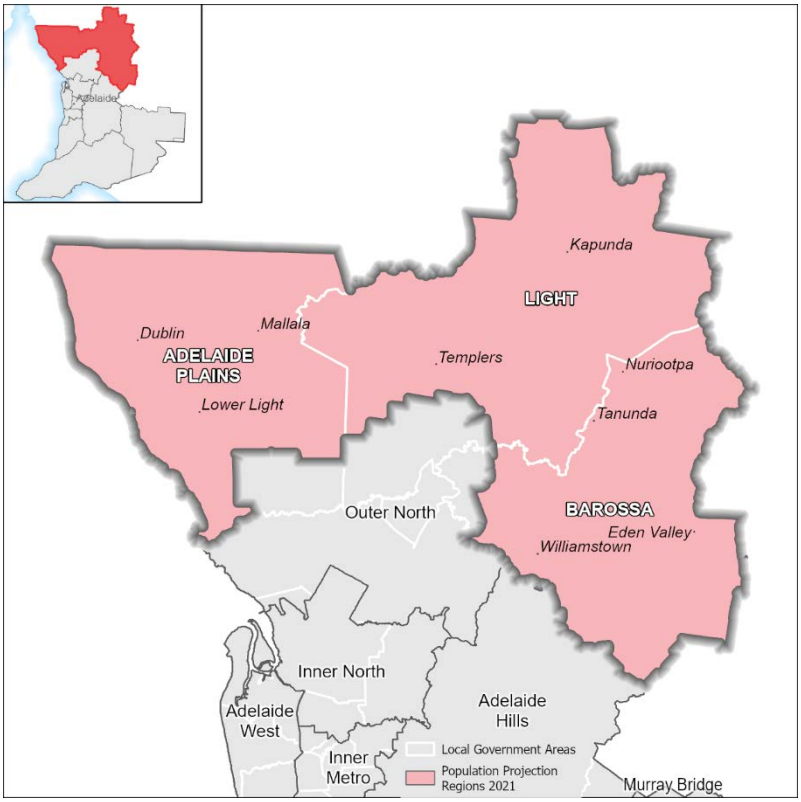


5.9 Northern Plains and Barossa

Region Summary

The region includes the towns of Kapunda, Freeling, Mallala, Dublin, Tanunda, Nuriootpa and Williamstown. It is an economically diverse area and includes the Barossa Valley wine region, grain and livestock farming and tourism.

Due to the region's proximity to the Adelaide metropolitan area, it is attractive for residential growth. Growth opportunities in the townships are spread across the region, however, are limited due to restrictions imposed by both the Character Preservation District and the Environment and Food Protection Area, that cover much of the region.



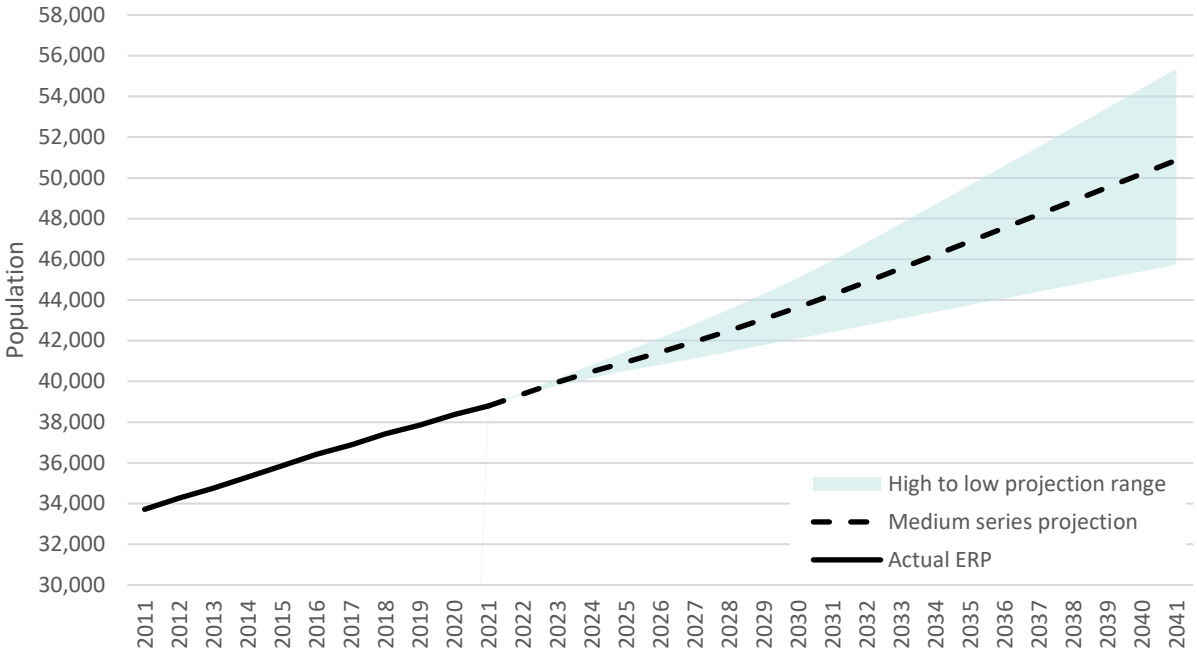
Projected Growth 2021 to 2041

Table 15 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 15: Projected Population, Northern Plains and Barossa Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
	Total Population		
2021	38,797	38,797	38,797
2041	45,728	50,866	55,355
2021-2041	6,931	12,069	16,558
	Average annual change		
2021-2041	347	603	828
2021-2041 (%)	0.89	1.56	2.13

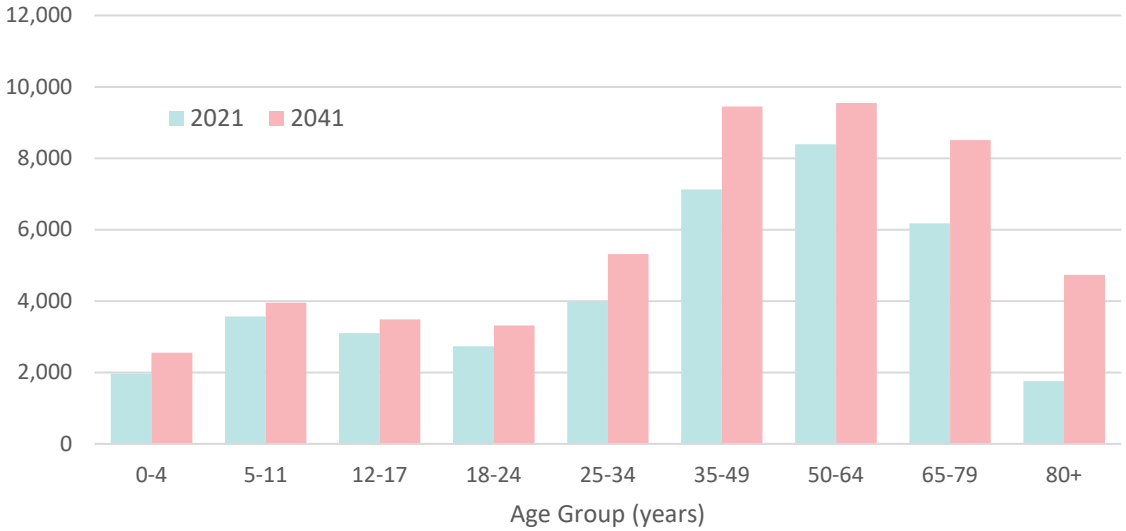
Figure 38: Projected Population, Northern Plains and Barossa Region, 2021-2041



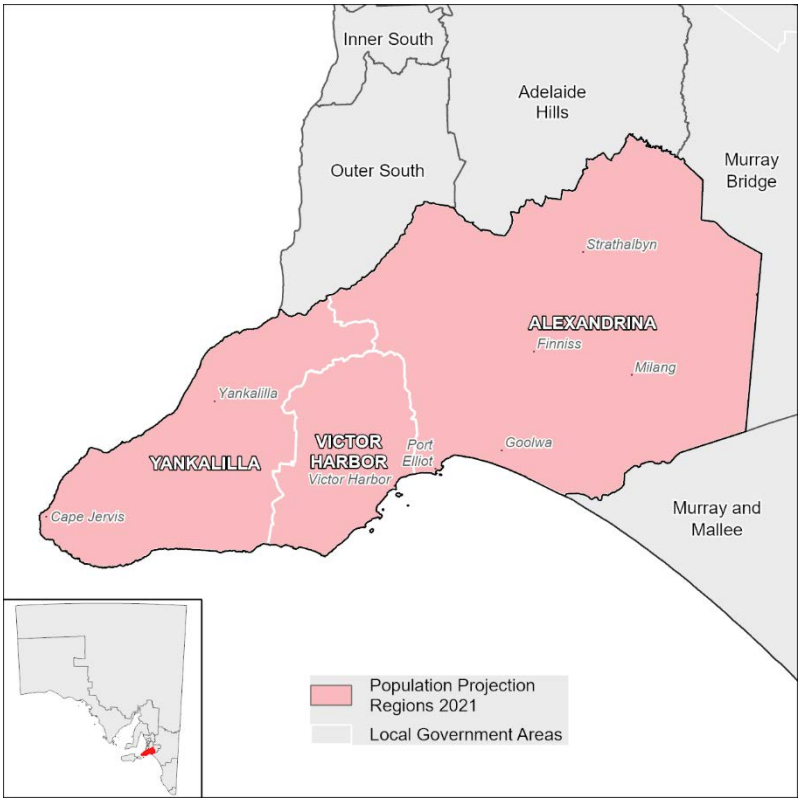
Age Profile

Growth is projected across all age groups, with the largest increase in those aged 65+.

Figure 39: Population by service age group – medium series, Northern Plains and Barossa Region, 2021 vs 2041



5.10 Fleurieu Peninsula



Region Summary

The Fleurieu Peninsula region is an attractive and economically diverse area. Industries include wine in Langhorne Creek, tourism, forestry, retirement services and a diverse range of agriculture. In 2021 there were 51,600 people living in the region. Since 2016, the population has increased by around 4,800 people.

The Fleurieu Peninsula has many coastal and inland towns and is an attractive area for both tourism and retirement living. The region is well serviced by the main townships of Victor Harbor, Goolwa, Strathalbyn and Yankalilla, and by its proximity to the Adelaide metropolitan area. Long term growth opportunities beyond township boundaries, however, are limited due to the Environment and Food Protection Area that covers much of the region.

Growth in the Fleurieu Peninsula region is expected to be driven by:

- Jobs in agriculture and aquaculture sectors
- Tourism and retirement services

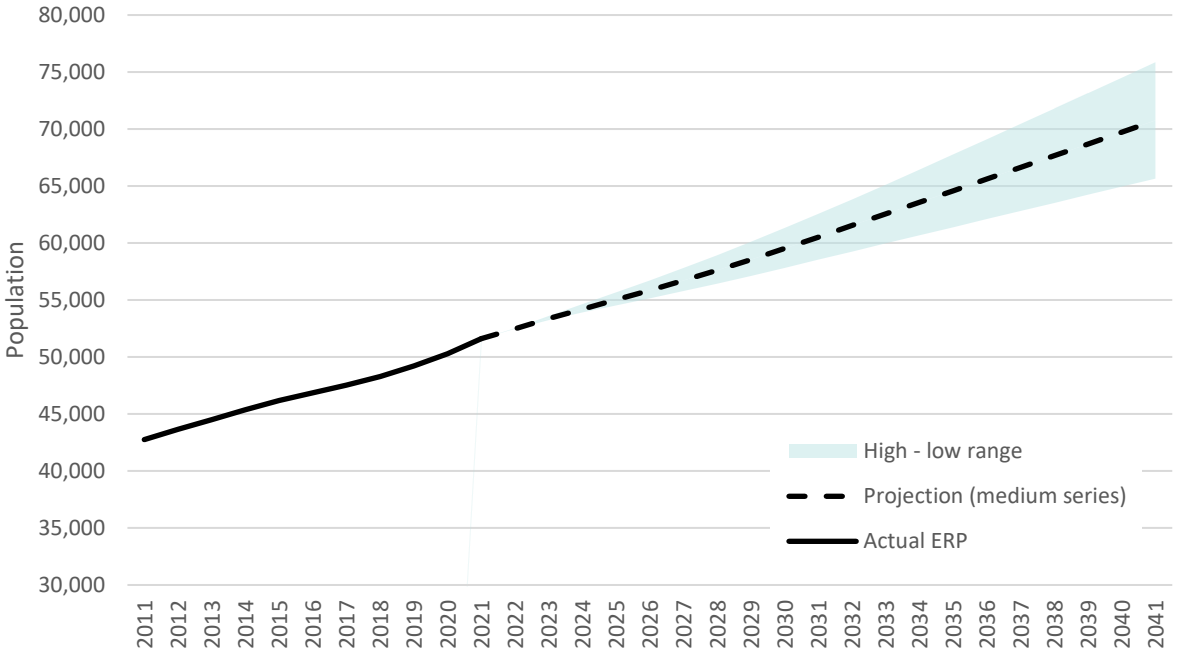
Projected Growth 2021 to 2041

Table 16 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 16: Projected Population, Fleurieu Peninsula Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	51,612	51,612	51,612
2041	65,649	70,754	75,862
2021-2041	14,037	19,142	24,250
Average annual change			
2021-2041	702	957	1,212
2021-2041 (%)	1.36	1.85	2.35

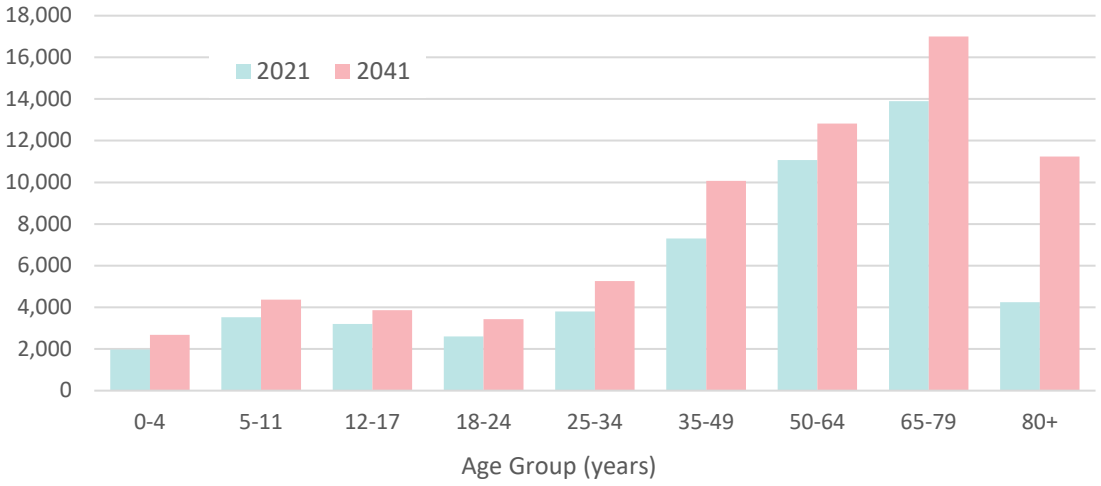
Figure 40: Projected Population, Fleurieu Peninsula Region, 2021-2041



Age Profile

This region is heavily dominated by older age groups. It is projected this will continue over the next 20 years, as more people move to the region for retirement.

Figure 41: Population by service age group – medium series, Fleurieu Peninsula Region, 2021 vs 2041



5.11 Kangaroo Island

Region Summary

The Kangaroo Island region is an economically diverse area with attractive landscapes and sea vistas. Tourism is the main industry, with forestry, aquaculture and agriculture also contributing to the economy of the region. In 2021 there were close to 5,000 people living in the region. Since 2016, the population has increased by 1,60 people.

The main town servicing the region is Kingscote. The Island was significantly impacted by bushfires in late 2019 and early 2020. Along with significant bushland, infrastructure and animal stock losses, the plantation timber industry lost around 95% of trees. Kiland (formerly Kangaroo Island Plantation Timber (KIPT), lost most of its plantation timber, and have recently announced a major redirection of their business towards sheep meat production and biochar and carbon crediting of their stocks of burnt plantation timber.

Sealink ferry services are building two larger ferries with increased service to the island due to commence mid-2024. The importance of maintaining the natural environment on the island is crucial to its tourism economy and the island is slowly recovering its flora and fauna.

Growth in the Kangaroo Island region is expected to be driven by:

- Tourism and jobs in agriculture and aquaculture sectors

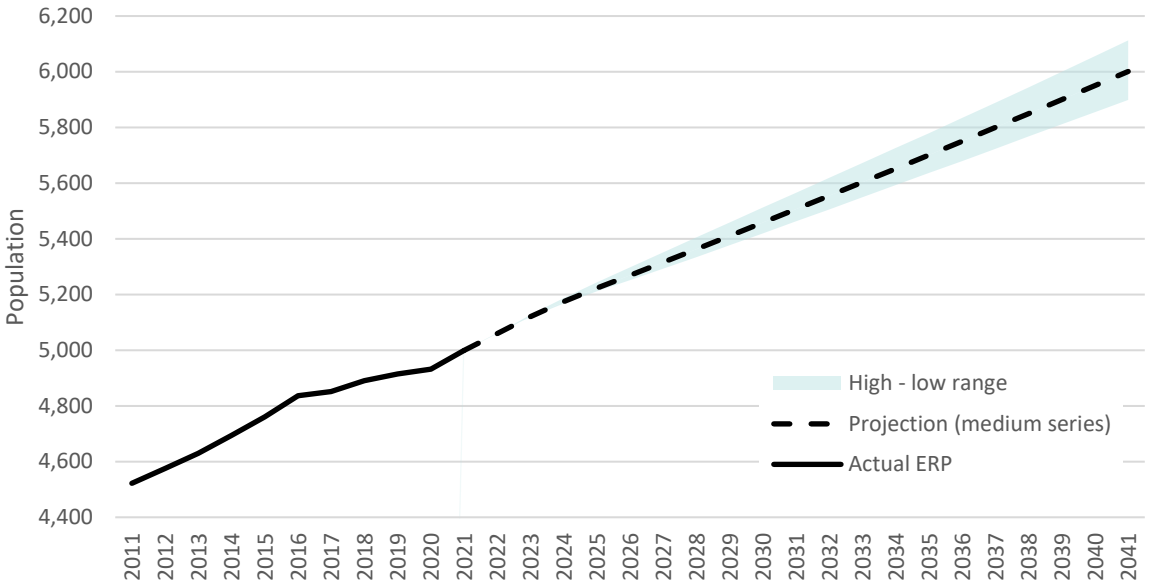
Projected Growth 2021 to 2041

Table 17 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 17: Projected Population, Fleurieu Peninsula Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	4,999	4,999	4,999
2041	5,899	6,001	6,113
2021-2041	900	1,002	1,114
Average annual change			
2021-2041	45	50	56
2021-2041 (%)	0.90	1.00	1.11

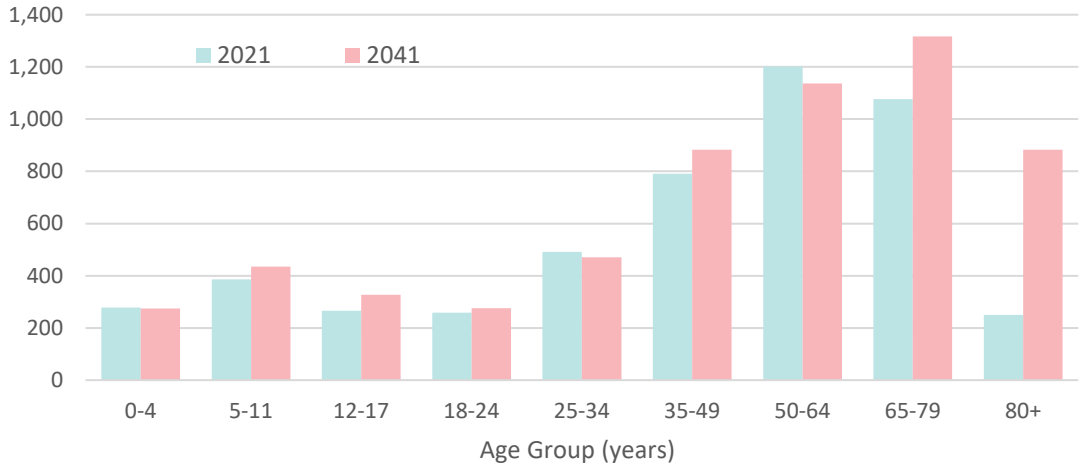
Figure 42: Projected Population, Kangaroo Island Region, 2021-2041



Age Profile

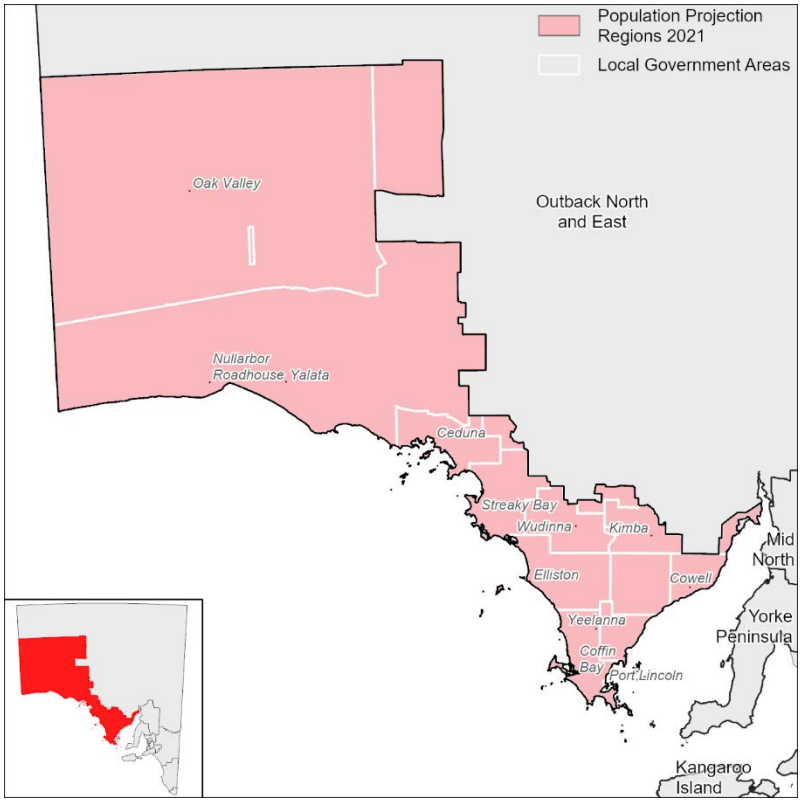
This region is primarily dominated by older age groups. It is projected that some age groups will slightly decrease, including those aged 0-4, 25-34 and 50-64. The 80+ age cohort is projected to grow significantly.

Figure 43: Population by service age group – medium series, Kangaroo Island Region, 2021 vs 2041



5.12 Eyre Peninsula and South West

Region Summary



Major towns in this region include Port Lincoln, Ceduna and Wudinna. It is an economically diverse area with industries that include mining, manufacturing, grain and livestock farming, aquaculture and tourism.

The population in 2021 was 37,000. Since 2016, the region has grown by just over 1,000 people.

New deep sea port developments are in various stages of development and a recently completed transhipment port facility at Lucky Bay is supporting grain exports from the region. There is also a proposal for a national nuclear medical waste facility near Kimba. The region is renowned as a high quality producer of aquaculture and further expansions in this industry is expected.

The Eyre Peninsula High Voltage transmission link was completed early 2023 and will provide businesses and the public with a more reliable power supply, enabling further investment in the Eyre Peninsula.

Port Lincoln is the main service centre for the lower reaches of the Peninsula. Ceduna on the west coast also functions as service centres for the region.

Growth in the Eyre Peninsula and South West region is expected to be driven by:

- Jobs in renewables, agriculture and aquaculture and supporting infrastructure.

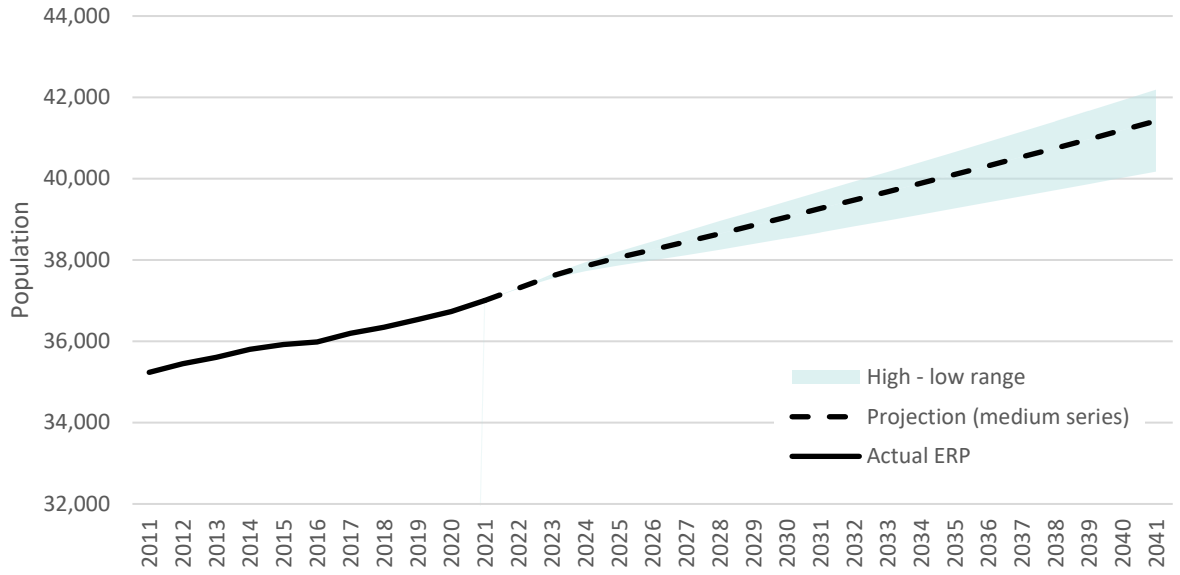
Projected Growth 2021 to 2041

Table 18 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 18: Projected Population, Eyre Peninsula and South West Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
	Total Population		
2021	37,004	37,004	37,004
2041	40,172	41,419	42,189
2021-2041	3,168	4,415	5,185
	Average annual change		
2021-2041	158	221	259
2021-2041 (%)	0.43	0.60	0.70

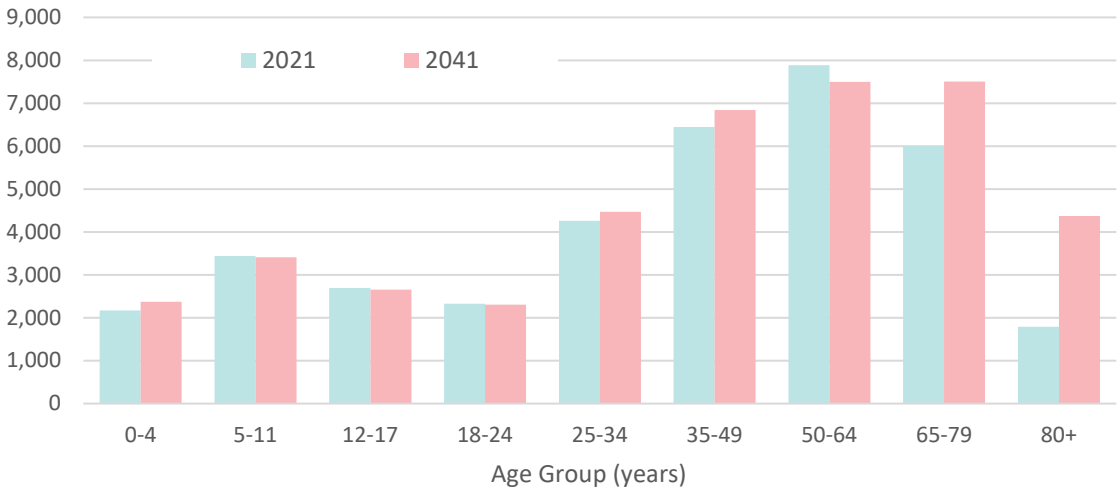
Figure 44: Projected Population, Eyre Peninsula and South West Region, 2021-2041



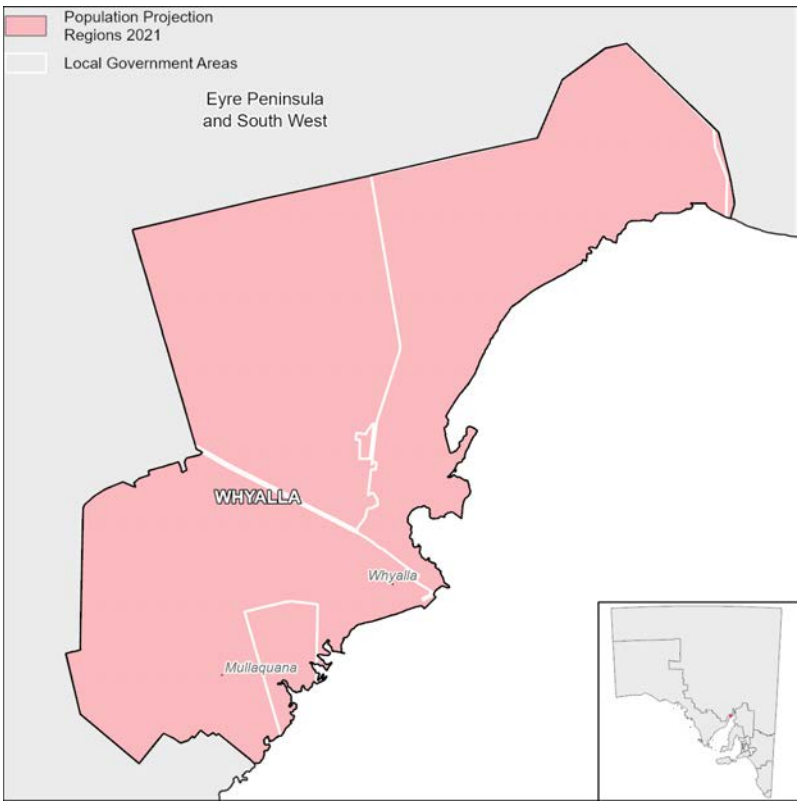
Age Profile

Growth in several age cohorts is projected to decline over the next 20 years. The greatest growth is projected within the population aged 65+.

Figure 45: Population by service age group – medium series, Eyre Peninsula and South West Region, 2021 & 2041



5.13 Whyalla



Region Summary

The township of Whyalla is the second largest town outside of the Greater Adelaide Planning Region, behind Mount Gambier.

At the 2021 census, the population of the region was 21,868. Since 2016, the population of Whyalla has declined by around 560 people.

Whyalla has a rich history as a steel producing town and the Whyalla Steelworks are the main employer in town employing around 3,000 people. The steelworks announced in April 2023 that they will beginning to phase out coal-based steelmaking by building a new electric arc furnace by 2025. This furnace will eventually be fully powered by green energy. Port Bonython, just north of Whyalla, is also being investigated by the hydrogen sector for a power station that will use excess renewable energy from the region to produce hydrogen, and a hydrogen storage facility to provide additional capacity when required. An upgrade of the Port Bonython Jetty would also be required if this hydrogen hub goes ahead and Whyalla could only benefit from an influx of jobs to the area.

Growth in the Whyalla region is expected to be driven by:

- Jobs in renewables
- Jobs in the steel and mining sector

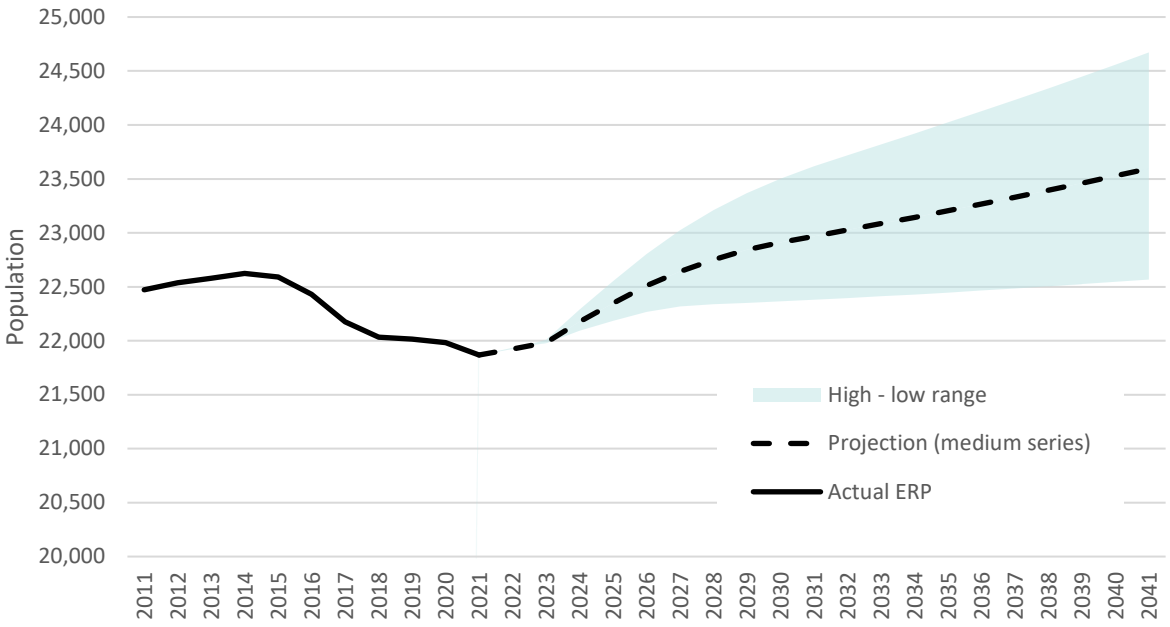
Projected Growth 2021 to 2041

Table 19 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 19: Projected Population, Whyalla Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
	Total Population		
2021	21,868	21,868	21,868
2041	22,566	23,595	24,672
2021-2041	698	1,727	2,804
	Average annual change		
2021-2041	35	86	140
2021-2041 (%)	0.16	0.39	0.64

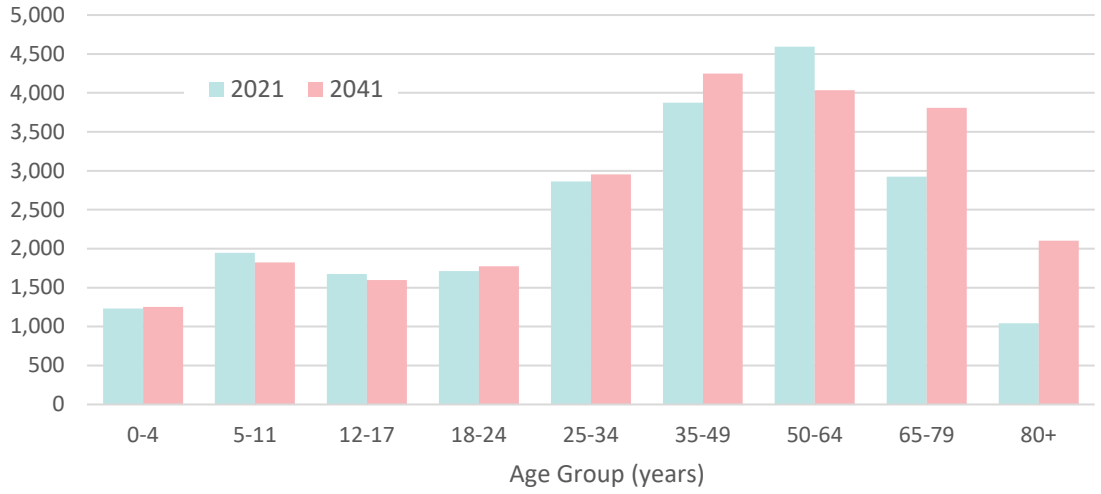
Figure 46: Projected Population, Whyalla Region, 2021-2041



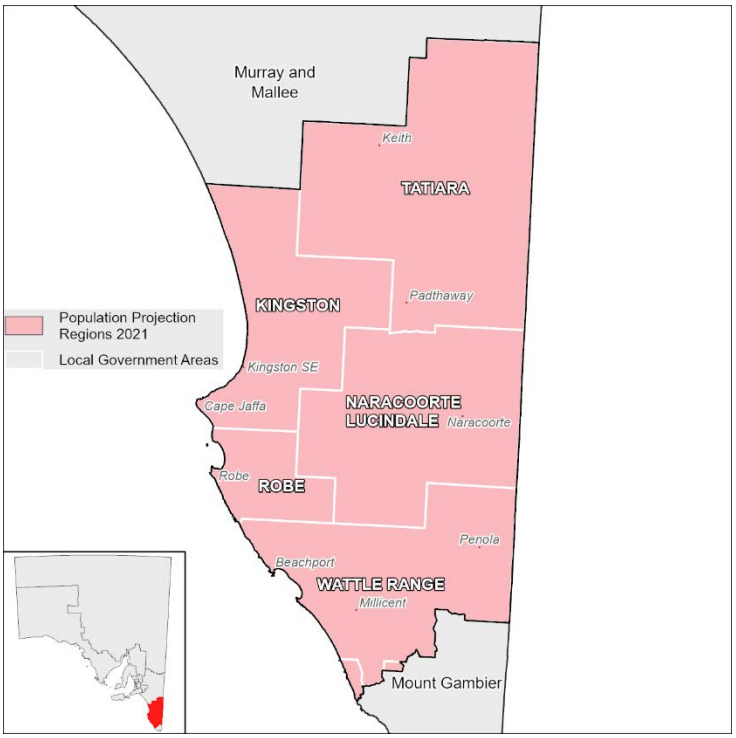
Age Profile

Growth in this region is projected to be mostly within working age groups and those aged over 65 years.

Figure 47: Population by service age group – medium series, Whyalla Region, 2021 & 2041



5.14 Limestone Coast



Region Summary

Major towns in this region include Robe, Millicent, Naracoorte and Keith. The Limestone Coast region's economy includes viticulture, agriculture, aquaculture, forestry and tourism. In 2021 the population in the region was almost 32,000. Between 2016 and 2021, the population grew by 800 people.

Forestry, viticulture, agriculture and aquaculture have been the backbone of the South-East area of the state for many years. The wine producing areas, coastal towns, beaches and Naracoorte caves are popular tourist destinations.

The coastal town of Robe and the Coonawarra wine district are major tourism drawcards for the region. Robe is a favourite tourist destination but is also known as a famed crayfish town. An expansion of the timber industry complex at Kalangadoo should provide new jobs in the timber processing sector. A 36-hole international standard golf course with spa and conference facilities at Nora Creina is proposed. If developed, this coastal facility would provide many new jobs in the area.

Growth in the Limestone Coast region is expected to be driven by:

- Jobs in the viticulture sector
- Jobs in renewables, forestry and education sectors
- Tourism

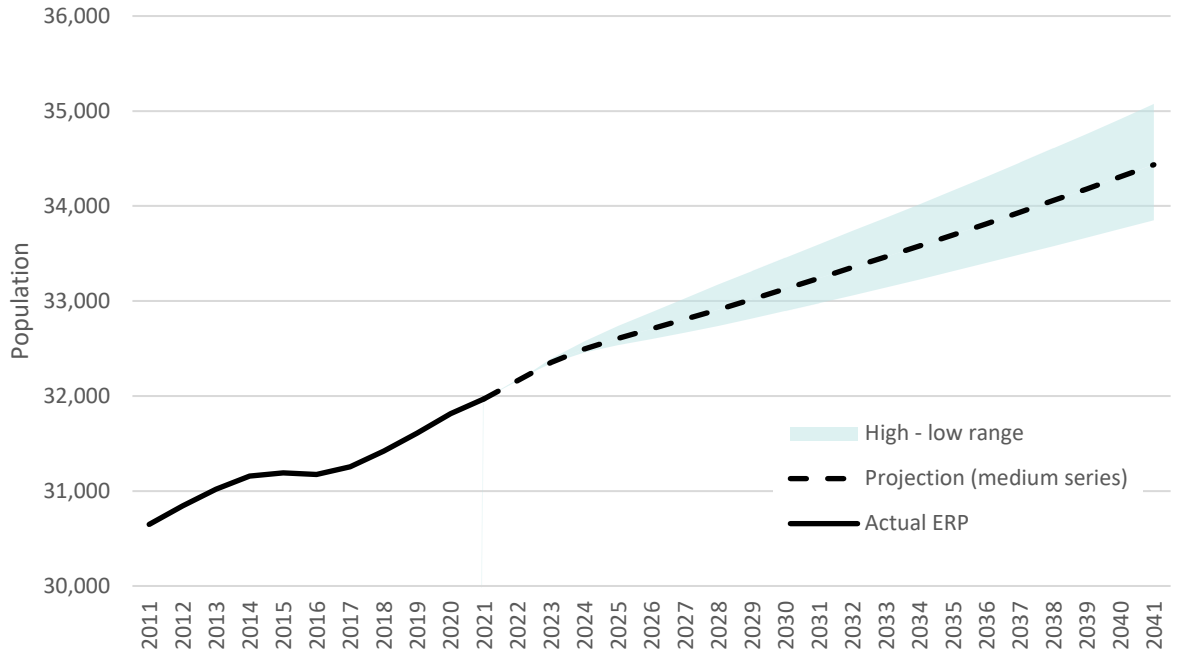
Projected Growth 2021 to 2041

Table 20 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 20: Projected Population, Limestone Coast Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	31,970	31,970	31,970
2041	33,849	34,435	35,075
2021-2041	1,879	2,465	3,105
Average annual change			
2021-2041	94	123	155
2021-2041 (%)	0.29	0.39	0.86

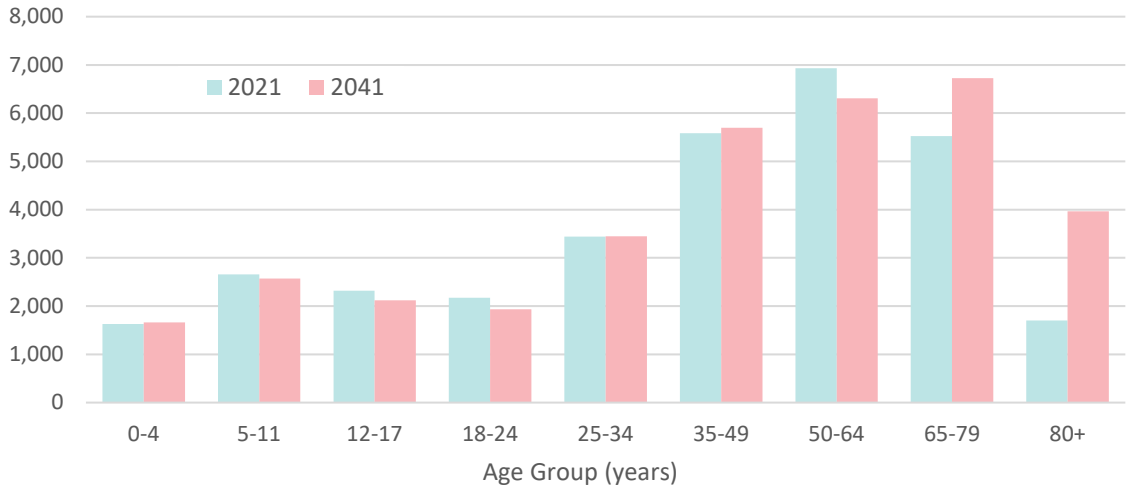
Figure 48: Projected Population, Limestone Coast Region, 2021-2041



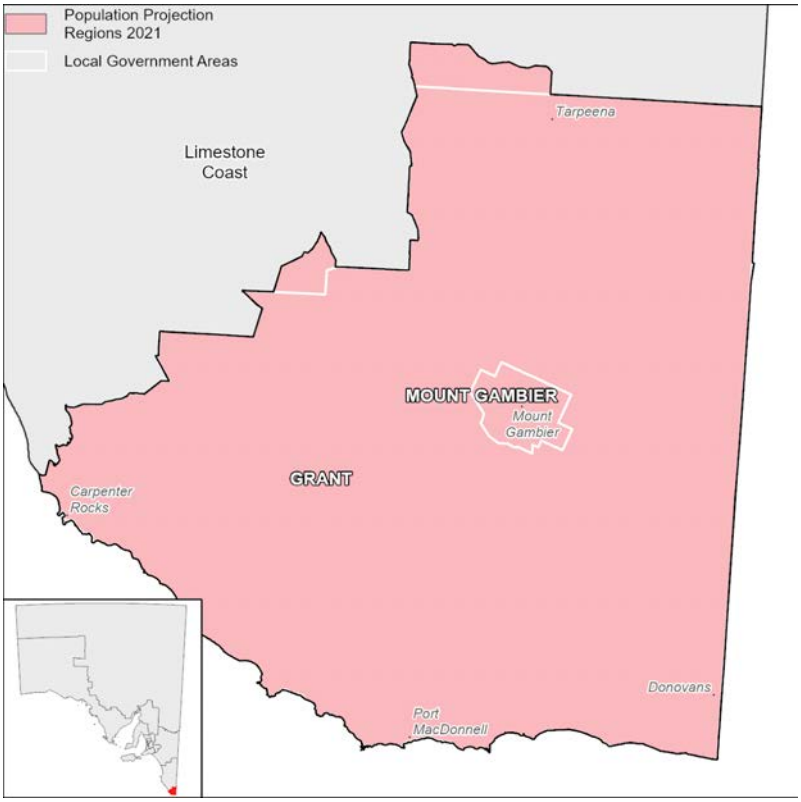
Age Profile

It is projected that this region will experience losses across the younger age cohorts (12-24 years) as well as the mature aged workers (50-64), while those aged over 65 years will grow.

Figure 49: Population by service age group – medium series, Limestone Coast Region, 2021 & 2041



5.15 Mount Gambier



Region Summary

This region includes the council areas of Mount Gambier and Grant. Mount Gambier is the main town within this region. The region's economy includes agriculture, aquaculture, forestry and tourism. The population in 2021 was 36,600. This region had grown by 1,050 people between 2016 and 2021. Mount Gambier is the largest town in South Australia outside of the Greater Adelaide Planning region.

Mount Gambier is the major service centre in the South-East region and has historically relied heavily on the forestry industry for jobs creation and growth. An expansion of the timber industry complex at Kalangadoo should provide new jobs in the timber processing sector. In recent years the Mount Gambier airport has undergone a major upgrade and a new state of the art recreation and convention centre has opened. In the Grant council, a new laminated timber production facility in Tarpeena is set to open in late 2023, employing around 250 persons. The region is attractive for tourism with iconic volcanic lakes and sinkhole garden in Mount Gambier, and Piccaninnie and Ewens Ponds Conservation Parks, among many.

Growth in the Mount Gambier region is expected to be driven by:

- Population serving jobs
- Jobs in renewables, forestry and education sectors
- Tourism

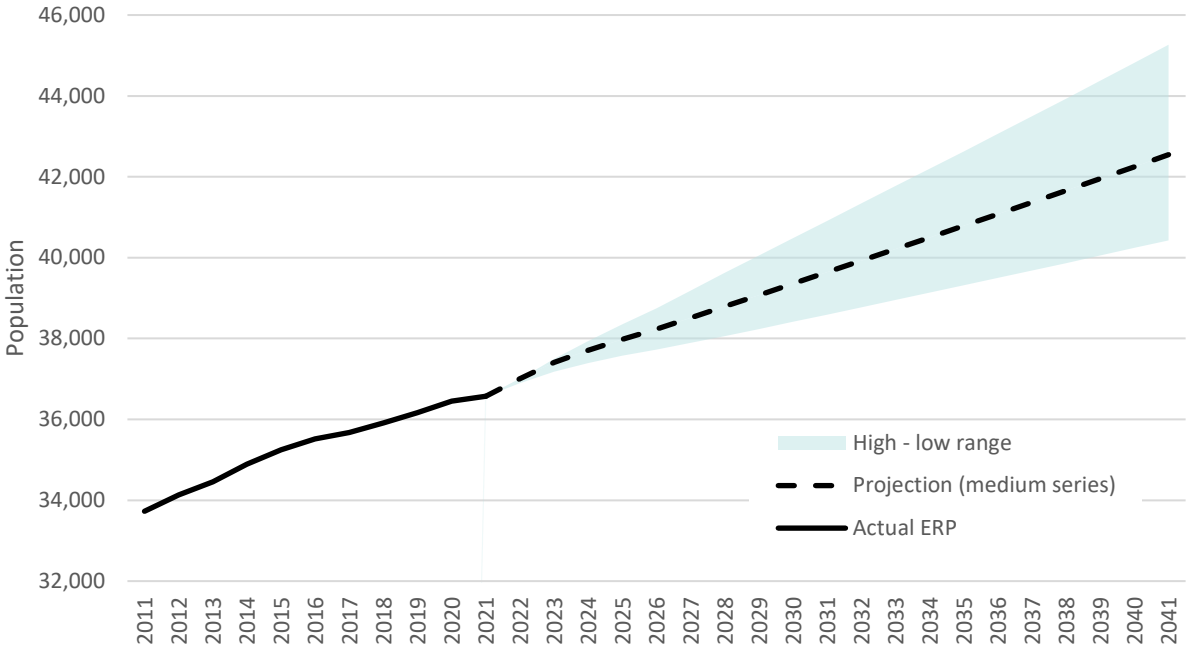
Projected Growth 2021 to 2041

Table 21 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 21: Projected Population, Mount Gambier Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	36,572	36,572	36,572
2041	40,426	42,547	45,266
2021-2041	3,854	5,975	8,694
Average annual change			
2021-2041	193	299	435
2021-2041 (%)	0.53	0.82	1.19

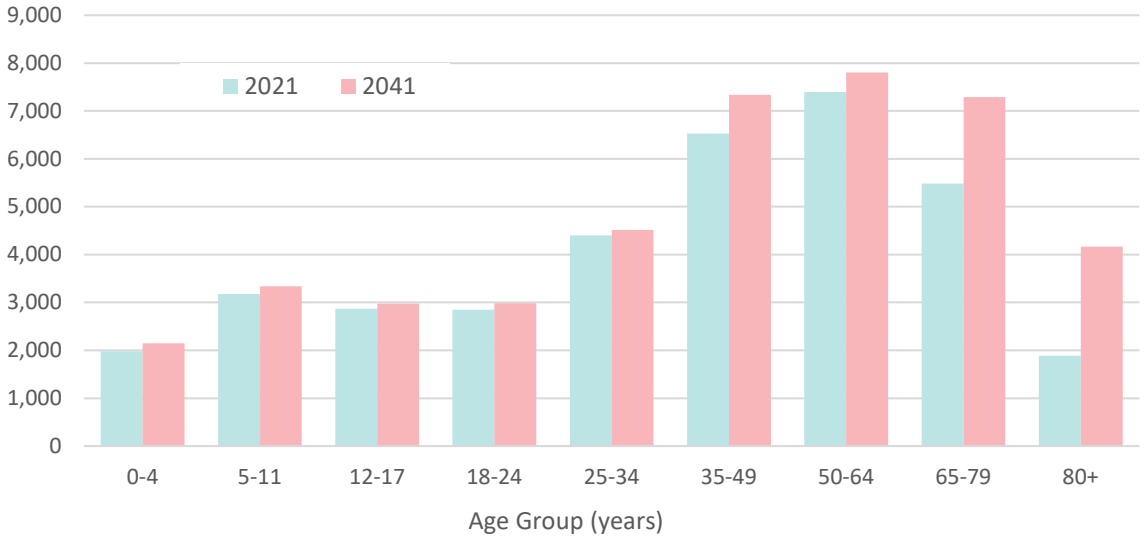
Figure 50: Projected Population, Mount Gambier Region, 2021-2041



Age Profile

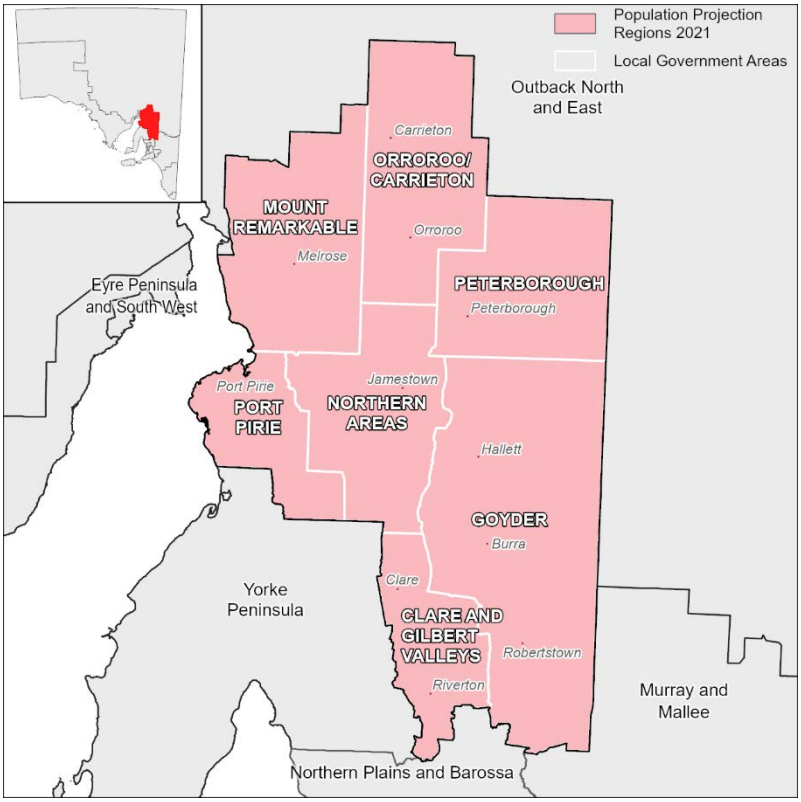
Growth in this region is projected to occur across all age cohorts. The population aged over 80 is projected to more than double over the next 20 years.

Figure 51: Population by service age group – medium series, Mount Gambier Region, 2021 & 2041



5.16 Mid North

Region Summary



Major towns in this region include Port Pirie, Jamestown, Clare, Burra and Peterborough. It is an economically diverse area with industries including wine, grain and livestock farming, tourism and energy generation and storage. The region had a population of 41,300 in 2021. Since 2016, the population has remained steady.

The Mid North region has become popular for the establishment of renewable energy farms. Recently the Goyder South windfarm started construction of 75 wind turbines south of Burra, with plans to create a Goyder Renewables zone exporting electricity to NSW when the SA-NSW Interconnector is built. A green hydrogen project in Port Pirie is being investigated, as is a hydrogen production facility at the Crystal Brook Energy Park.

Tourism is important in the region, with the Clare Valley wine region in the south and the gateway to the Flinders Ranges in the north. The region is backed by its agricultural sector. Port Pirie is the largest town in the region, but services are also provided by Port Augusta and Adelaide.

Growth in the Mid North region is expected to be driven by:

- Job creation in Port Pirie through new industries
- Jobs in the tourism, renewables, viticulture and agriculture sectors
- Retirement migration to Clare

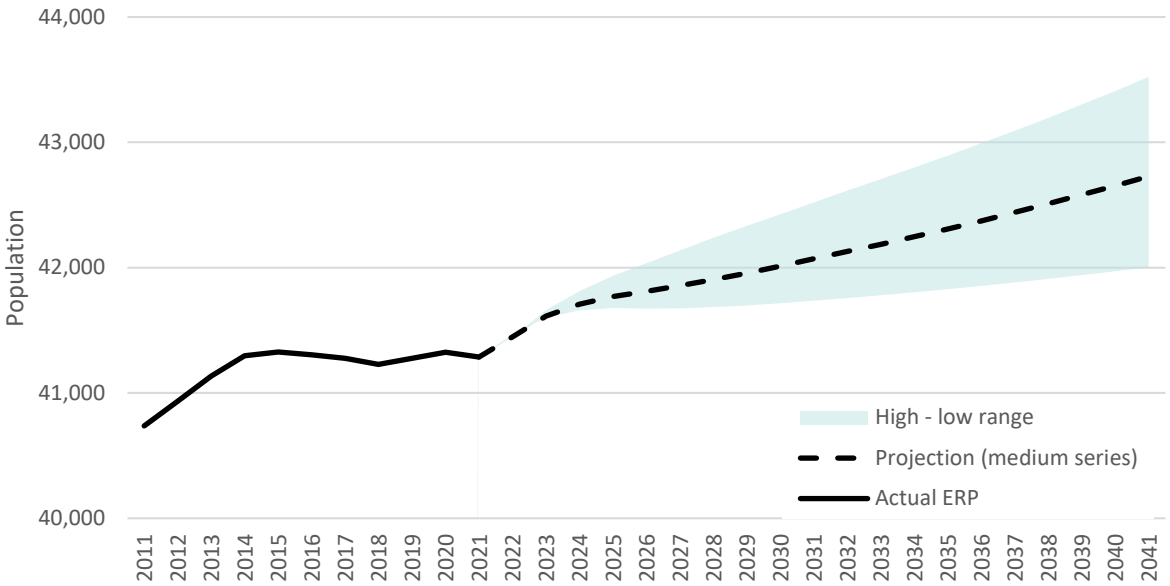
Projected Growth 2021 to 2041

Table 22 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 22: Projected Population, Mid North Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	41,287	41,287	41,287
2041	42,003	42,729	43,523
2021-2041	716	1,442	2,236
Average annual change			
2021-2041	36	72	112
2021-2041 (%)	0.09	0.17	0.27

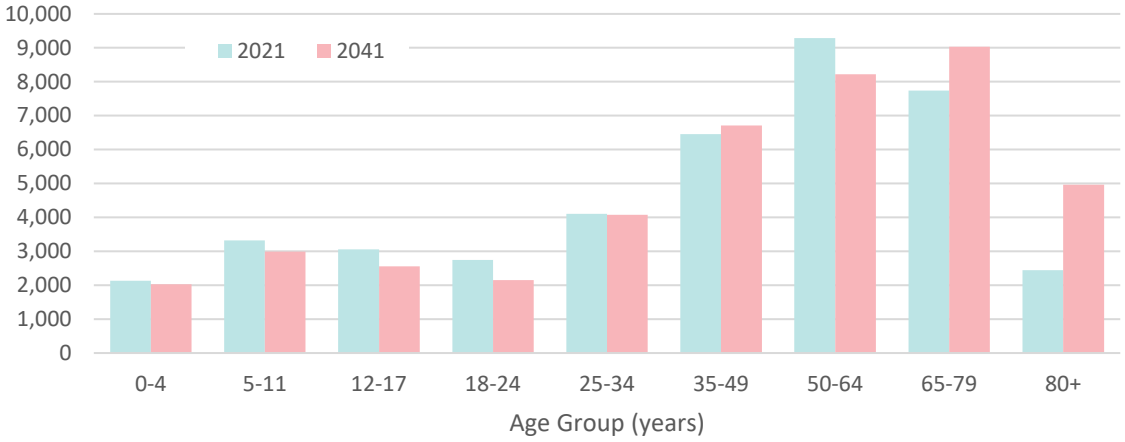
Figure 52: Projected Population, Mid North Region, 2021-2041



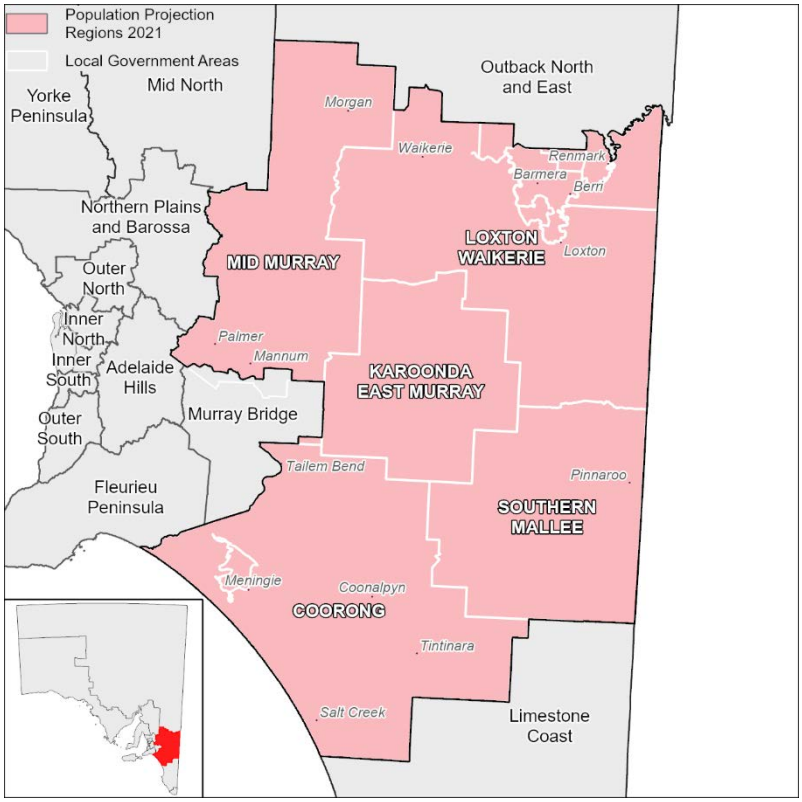
Age Profile

Growth is projected to fall across most age groups. Only the 35-49 age cohort and the 65+ population is projected to increase.

Figure 53: Population by service age group – medium series, Mid North Region, 2021 and 2041



5.17 Murray and Mallee



Region Summary

Major towns in this region include Loxton, Waikerie, Berri, Renmark, Mannum and Meningie. The Murray and Mallee's economy is primarily agricultural, including dairying, piggeries, horticulture and viticulture, with an expanding processing and manufacturing sector. The population was 50,400 in 2021. Since 2016, the region had grown by 800 people.

Renewable energy developments in the region that are expected to support growth include the recently completed Coonalpyn and Tailem Bend solar farms. Planning is underway for a solar farm at Morgan and a battery storage system at Tailem Bend. SA potato supplier the Pye Group, is set to build a new potato washing and packing facility at Parilla. Tourism in the River Murray towns is expected to recover after the near record flooding experienced in early 2023.

The large neighbouring town of Murray Bridge provides job opportunities for the wider area and this opportunity will be increased with Thomas Foods International scheduled to open a new upgraded meat processing facility by the end of 2023, with further expansions to follow. The Riverland towns of Loxton, Berri and Renmark provide services to the north of the region, with the Riverland area relying heavily on agriculture and tourism for growth.

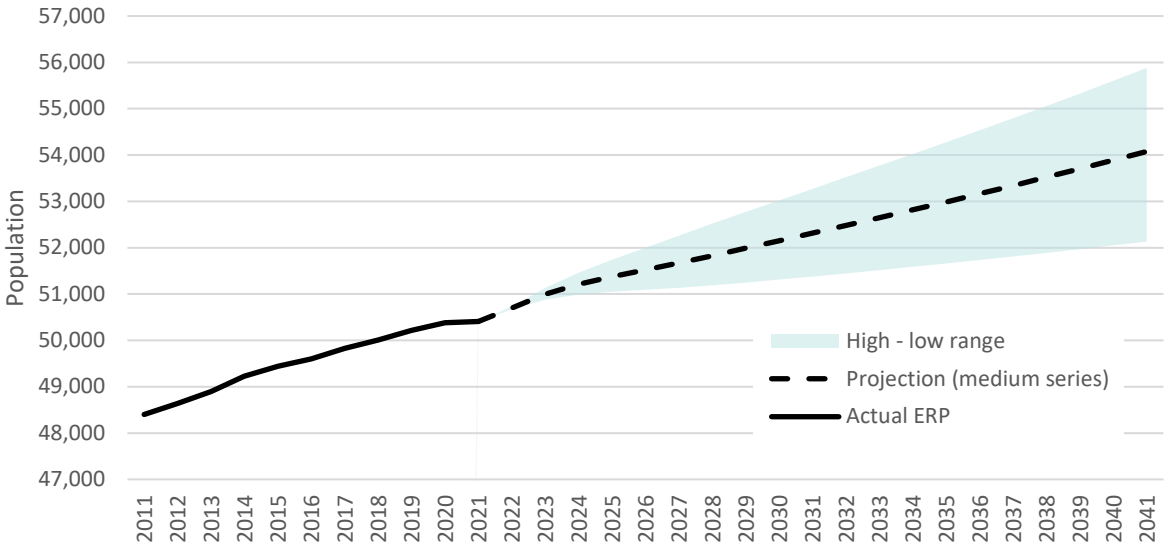
Projected Growth 2021 to 2041

Table 23 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 23: Projected Population, Murray and Mallee Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	50,408	50,408	50,408
2041	52,130	54,077	55,881
2021-2041	1,722	3,669	5,473
Average annual change			
2021-2041	86	183	274
2021-2041 (%)	0.17	0.36	0.54

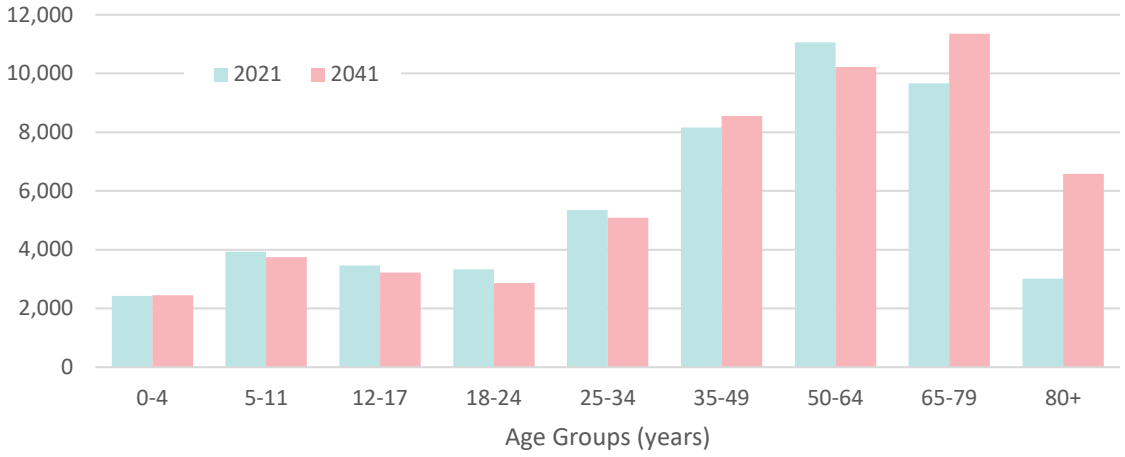
Figure 54: Projected Population, Murray and Mallee Region, 2021-2041



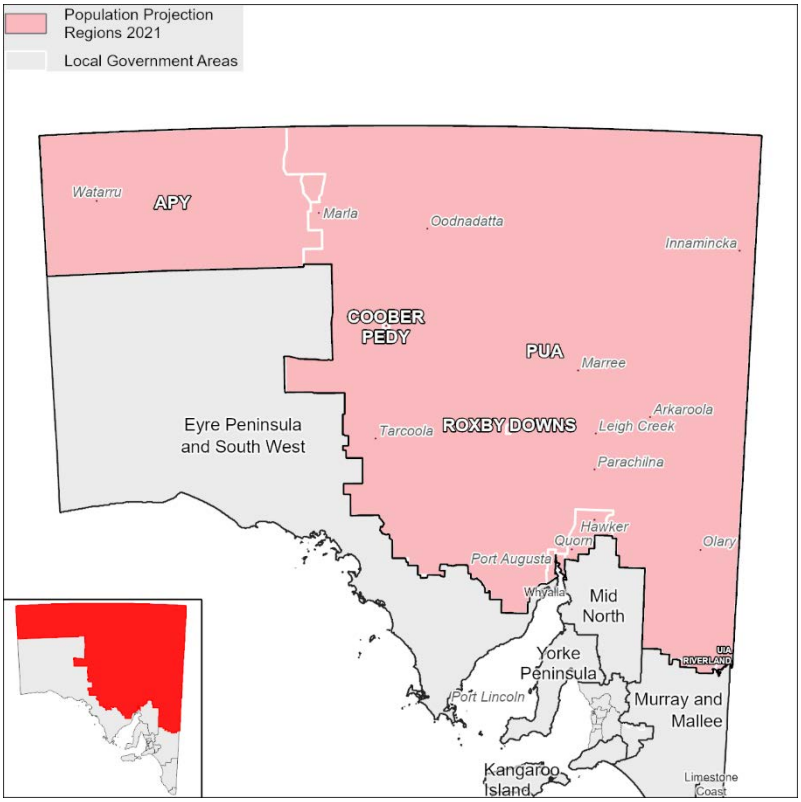
Age Profile

Growth is projected to fall across most age groups. Only the 35-49 age cohort and the 65+ population is projected to increase.

Figure 55: Population by service age group – medium series, Murray and Mallee Region, 2021 & 2041



5.18 Outback North and East



Region Summary

This region covers the remote northern part of the state. Port Augusta is the largest town. The main industries are mining and pastoralism, with recent growth in the renewables sector. The population in 2021 was 26,700. The region has declined by around 600 people since 2016.

This area is rich in resources. The Olympic Dam mine at Roxby Downs will continue as a major employer in the region and BHP is currently exploring the potential for a new Copper mine at Oak Dam. The Honeymoon mine, on the eastern edge of the region, will recommence production in late 2023. There are several renewable energy projects underway or in the planning stages near Pt Augusta, Cultana and Lincoln Gap. Port Bonython is being investigated for a potential hydrogen power station and storage facility.

The Leigh Creek Energy Project gained major project status in late 2022 and could employ hundreds of people if it goes ahead. Development of Hallett's Green Cement Project is underway near Pt Augusta. Plans are also underway to transform the former Port Augusta power station site into a bulk commodity export terminal.

Growth in the Outback North and East region is expected to be driven by:

- Support sector jobs, as Port Augusta is a main service centre for the area
- Jobs in the mining, renewables and hydrogen sector

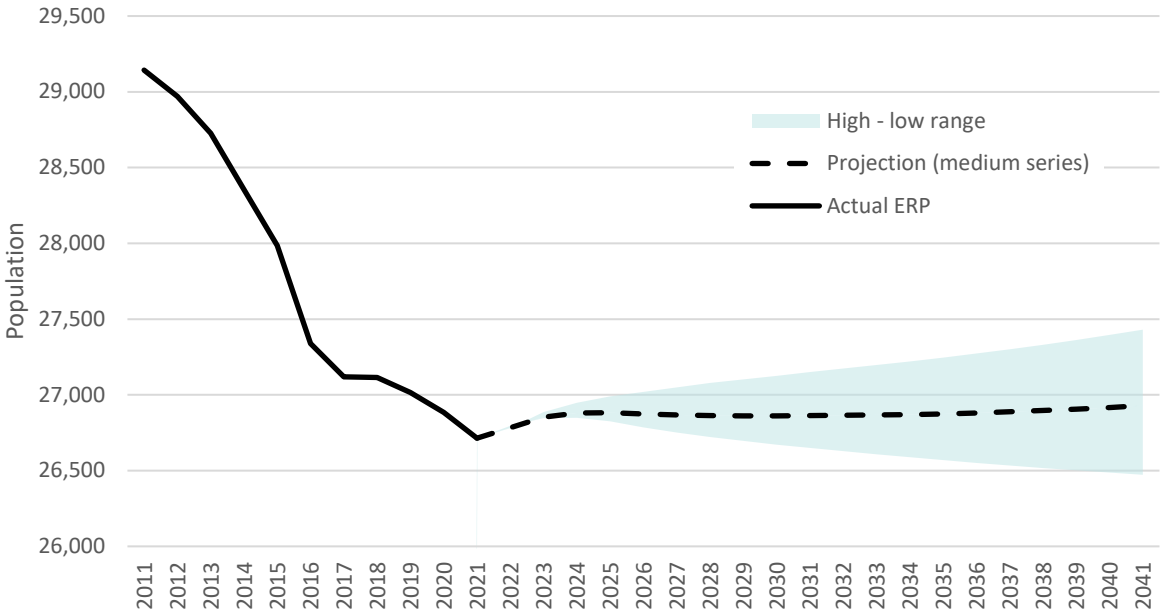
Projected Growth 2021 to 2041

Table 24 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 24: Projected Population, Outback North and East Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	26,714	26,714	26,714
2041	26,472	26,929	27,430
2021-2041	- 242	215	716
Average annual change			
2021-2041	- 12	11	36
2021-2041 (%)	- 0.05	0.04	0.13

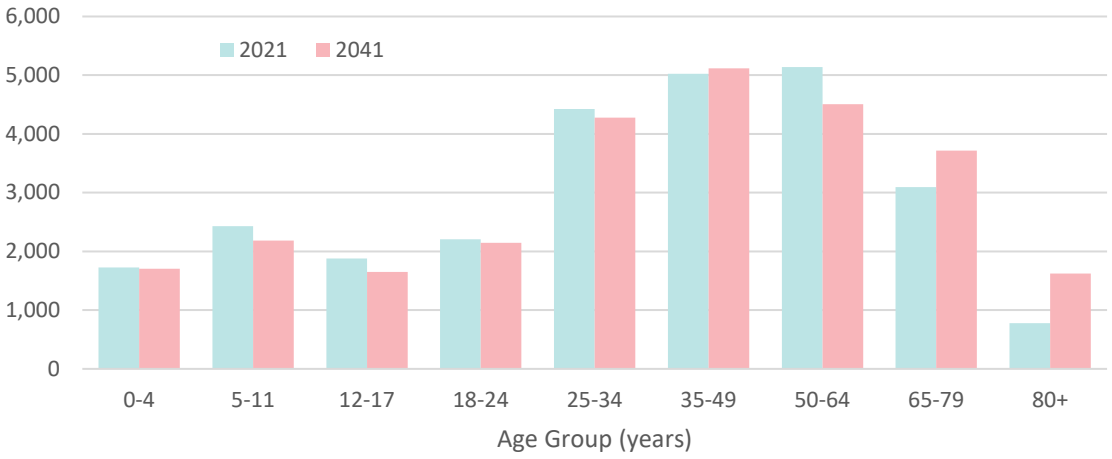
Figure 56: Projected Population, Outback North and East Region, 2021-2041



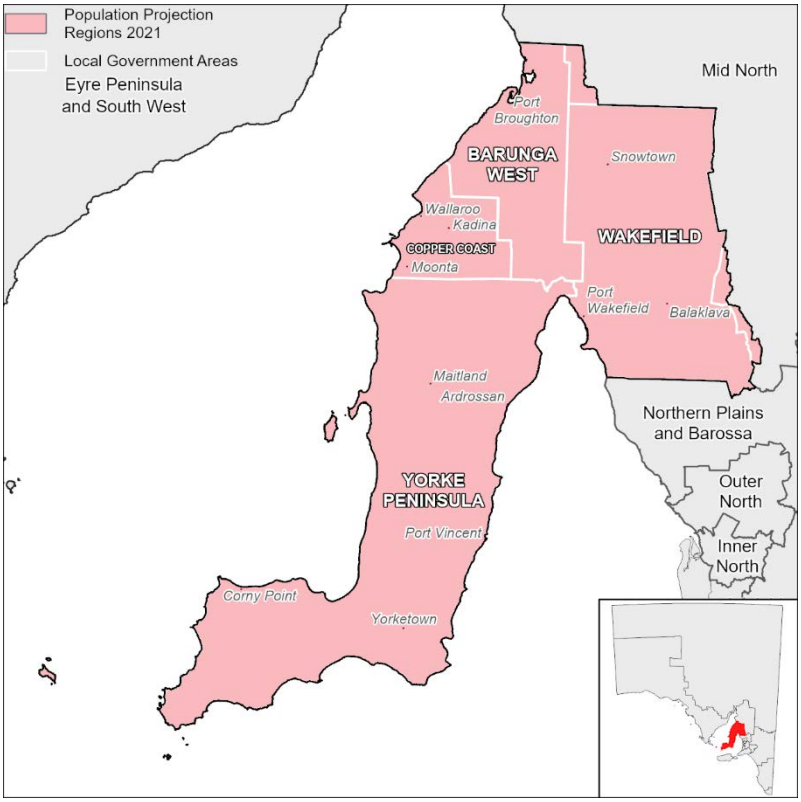
Age Profile

Growth is projected to fall across most age groups. The 35-49 age cohort will increase slightly, while the 65+ population is also projected to increase.

Figure 57: Population by service age group – medium series, Outback North and East Region, 2021 &



5.19 Yorke Peninsula



Region Summary

Major towns in this region include Kadina, Wallaroo, Balaklava, Maitland and Yorktown. The main industries in the area are grain and livestock farming, aquaculture and tourism. In 2021 the population was 36,900. Since 2016, the region grew by almost 1,500 people.

Developments in the Yorke Peninsula that will encourage growth include Rex Minerals Hillside Copper Project, south of Ardrossan, which is expected to employ around 430 persons at full production. A Red Seaweed farm near Point Pearce, a Copper Coast Motorsports Park near Wallaroo and a grain export facility at Wallaroo.

Tourism is popular in the region. The Copper Coast towns of Wallaroo, Kadina, Moonta and Port Hughes, and coastal towns further down the peninsula, are becoming attractive as a retirement 'sea-change' option for Adelaide and other regional areas. The main service centre in the region is Kadina, however Adelaide is also close enough for it to be considered a service centre for the region.

Growth in the Yorke Peninsula region is expected to be driven by:

- Job creation in the mining sector
- Grain industry and Ports
- Retirement migration to Coastal towns

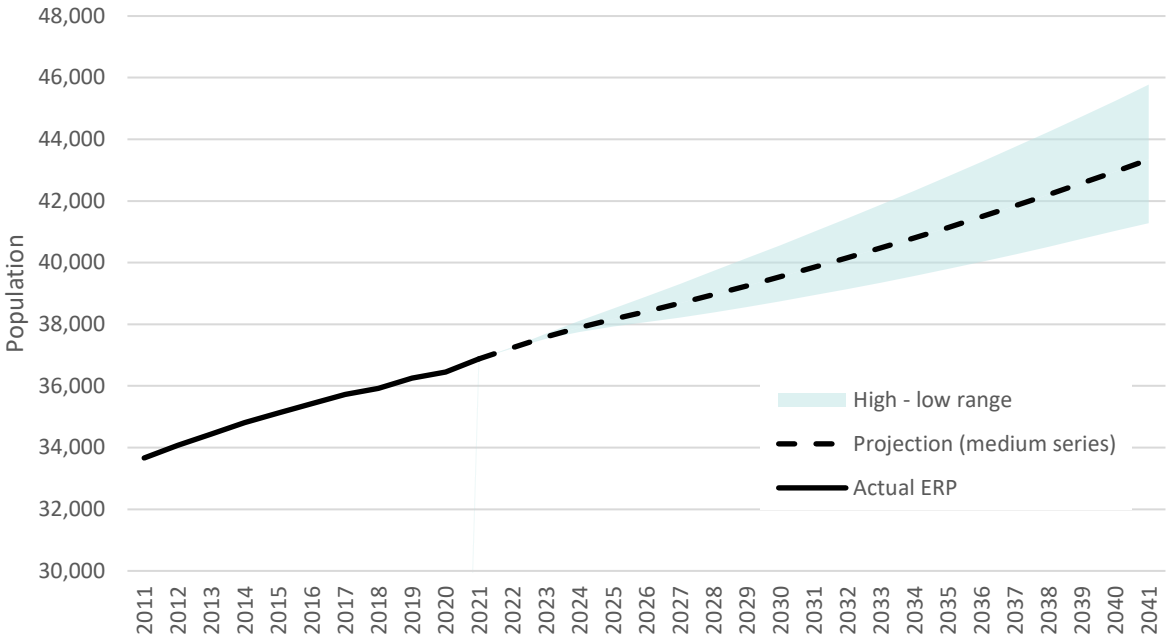
Projected Growth 2021 to 2041

Table 25 summarises the projected population for the region from 2021 to 2041 for the low, medium and high growth scenarios.

Table 25: Projected Population, Yorke Peninsula Region, 2021-2041

Year ending 30 June	Projection Series		
	Low	Medium	High
Total Population			
2021	36,879	36,879	36,879
2041	41,281	43,344	45,776
2021-2041	4,402	6,465	8,897
Average annual change			
2021-2041	220	323	445
2021-2041 (%)	0.60	0.88	1.21

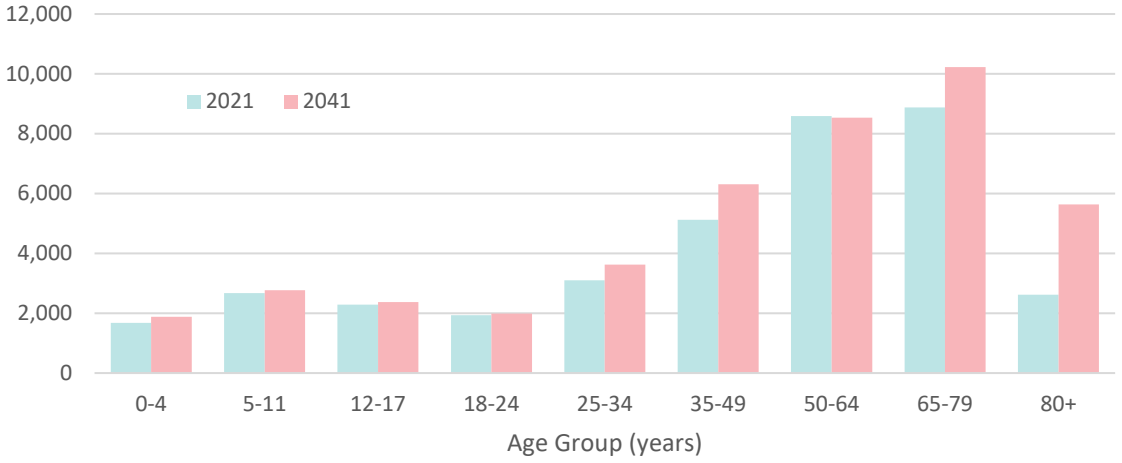
Figure 58: Projected Population, Yorke Peninsula Region, 2021-2041



Age Profile

Growth is projected across all age groups except for the 50-64 age cohort. The population aged over 80 is projected to more than double.

Figure 59: Population by service age group – medium series, Yorke Peninsula Region, 2021 & 2041



6. APPENDICIES

Appendix 1: Assumptions all-of-State population projection series, 2016-41

Assumption	Current	High	Medium	Low
Mortality **(Life expectancy at birth)**	Life expectancy at birth 2020/21: Males 81.3 yrs Females 85.6 yrs	Same as Medium	Increases from current levels to 2051: Males 86.3 Females 89.3	Same as Medium
Fertility **(Total Fertility Rate (TFR))**	2021 TFR 1.66 children per woman	Climbs from current level up to 1.75 by 2025, then held constant.	Falling from current level to 1.62 in 2023, then held constant.	Transition from current level down to1.50 in 2026, then held constant.
Net Overseas Migration	2019-20: 15,100 2021-22: 12,077	Increases to 20,500 in 2022-23, then drops slightly to 16,500 from 2027/28, then held constant.	Increases to 18,000 in 2022-23, then drops to 14,500 from 2026, then held constant.	Drops to 12,000 by 2027, then held constant.
Net Interstate Migration	2018-19: -3,300 2021-22: +1000 (adjusted NIM = +4,000)	Transition from +4,000 in 2022/23 to +1,000 by 2025, then held constant.	Transition from +4,000 in 2022/23 to -1,000 by 2026, then held constant.	Transition from +4,000 in 2022/23 to -3,000 by 2026, then held constant.

Appendix 2: Population Projections by Service Age Groups

Population projections within this report are shown by an age breakdown. Each age group represents a “service age” which is summarised in the following table:

Service age groups

0-4 yrs	Infants
5-11 yrs	Primary school
12-17 yrs	Secondary school
18-24 yrs	Tertiary education/labour force entrants
25-34 yrs	Younger workers
35-49 yrs	Established workers
50-64 yrs	Mature workers
65-79 yrs	Active retirees
80+ yrs	Older population