



Australian Government  
Centre for Population

# POPULATION STATEMENT

December 2020



Overview



Strong evidence. Deep insights. Collaborative approach.

# POPULATION STATEMENT

December 2020



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# Foreword

## The Hon. Alan Tudge MP

Minister for Population,  
Cities and Urban Infrastructure

Acting Minister for Immigration, Citizenship,  
Migrant Services and Multicultural Affairs

In 2019, the Australian Government created the Centre for Population to provide a single point of analysis to assess, monitor and project changes to the population. The Government also committed to publishing an annual Population Statement containing the Centre's analysis.

This is the first such Statement providing a major analytical contribution and a foundation for further analysis.

The Statement includes a discussion of how our population has changed and how it is expected to change in the future spanning states and territories, capital cities and regions, by age and gender.

In 2020, the Population Statement has a timely focus on the consequences of the COVID-19 pandemic. We all know the health and economic consequences of the pandemic, but the impact on our population has been equally extraordinary. This year, for example, we expect to see the slowest population growth since World War I. This has largely been due to closing the international borders and the resultant change in net overseas migration from averaging over 200,000 per annum for the last decade to negative 72,000 this year.

The pandemic has also had an impact on internal migration between states and will contribute to a lower fertility rate.

This Population Statement provides the transparent and meaningful analysis needed to help build a clear evidence basis and further inform policy. At this time of heightened uncertainty, we need high quality data and research to support decision-making as we navigate through the recovery and beyond.

The Statement has been developed in consultation with the states and territories, local government, expert working groups and academics and delivers on the commitment made by government leaders when they agreed on the National Population and Planning Framework in February this year.

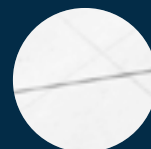
This Statement presents the analysis and projections needed to inform long-term policy challenges raised by demographic change and the short-term challenges we face in our recovery from the pandemic. Some of these challenges are more acute as a result of the COVID-19 pandemic, which has rapidly changed our overseas migration levels and limited the ways people have been able to move domestically.



As we better understand trends in our population, we can better answer future population challenges. It will inform decisions on infrastructure, services and housing that support growth, as well as help us better understand and analyse population distribution across the country.



Australia has a diverse and growing national population, with many local and regional success stories. Understanding these stories and recognising the vastly different dynamics of Australia's states and territories, cities and regions is vital for effective planning for the future.



# Key findings

## Insights from Australia's first Population Statement

The impact of COVID-19 is expected to be long lasting. Australia's population is expected to be smaller and older than projected prior to the onset of the pandemic.

Australia's population is estimated to be around 4 per cent smaller (1.1 million fewer people) by 30 June 2031 than it would have been in the absence of COVID-19. The population will also be older as a result of reduced net overseas migration and fewer births. Despite COVID-19, Australia's population is still growing and is expected to reach 28 million during 2028–29, three years later than estimated in the absence of COVID-19.

COVID-19 is projected to slow population growth across all geographic areas analysed, with the duration and magnitude linked to the importance of net overseas migration to different parts of the country.

Capital cities are projected to bear the heaviest impacts, with total population across capital cities estimated to be around 5 per cent lower by 30 June 2031 than in the absence of COVID-19. By contrast, population outside the capital cities is estimated to be around 2 per cent smaller than it would otherwise have been.

The number of people migrating interstate is projected to fall by 12 per cent in 2020–21. This would be the largest year-on-year drop in interstate migration in 40 years and would lead to the lowest rate of interstate migration as a proportion of the population on record.

Melbourne is projected to overtake Sydney to become Australia's largest city in 2026–27, with a population of 6.2 million by 2030–31, compared to 6.0 million in Sydney.

To access the full Population Statement, please visit [www.population.gov.au](http://www.population.gov.au).

Population growth is expected to be the slowest it has been in over a century



**0.2 per cent growth in 2020–21**



Some families will defer their decision to have children due to COVID-19

**1.61 babies per woman in 2020–21**



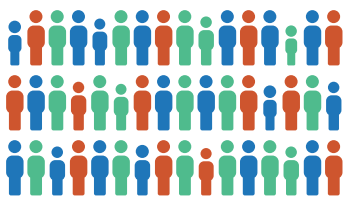
Net overseas migration is expected to fall sharply due to COVID-19



**72,000 net outflow in 2020–21**

**1.1m**

Australia's population is projected to be 1.1 million lower by 2031 than it would have been in the absence of COVID-19



Australia's population is still growing and is expected to reach 28 million during 2028–29, three years later than in the absence of COVID-19.

Melbourne is projected to overtake Sydney to become Australia's largest city





# Australia's first Population Statement

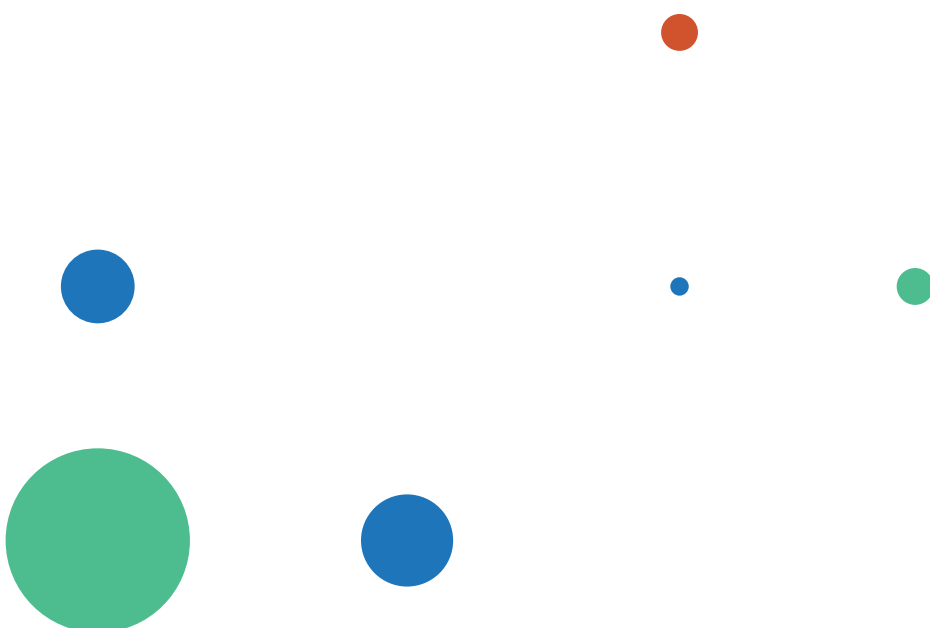
The first Population Statement is an important part of national efforts to increase understanding about populations, population change and its implications for all levels of government.

COVID-19 will likely have an impact on Australia's future population of a magnitude that has not been seen for several generations. The Statement comes at a critical time, when quality, coherent population projections built on transparent assumptions will be highly valued.

The uncertainty created by COVID-19 has underscored the importance of applying expertise and judgement in predicting its effects on the population. Population projections underpin economic and fiscal forecasts, policy decisions and programme design and implementation across all levels of government.

To estimate our future population, it is necessary to look back and understand historical population trends and then apply judgement about the extent to which past trends should be applied to future projections. The Statement assesses how Australia's population has changed, looks at the drivers of that change over the past 30 years and projects Australia's future population over the next 10 years. It does this at the national, state, territory, capital city and rest-of-state levels.

Regularly updated and transparent estimates of the future population, along with comprehensive analysis of past trends, will complement historical data from the Australian Bureau of Statistics and provide a better foundation for policy decisions that guide Australia's economic recovery.



# Australia's past population

Australia's population has been growing at an average rate of 1.4 per cent a year since 1971. This is relatively fast compared to other developed countries.

Net overseas migration is a key driver of population growth and since 2005–06 has consistently contributed more to growth than natural increase (Figure 1).

Migration has also lifted natural increase, because migrants coming to Australia are younger on average than the resident population, and also more likely to arrive at an age when they may have children.

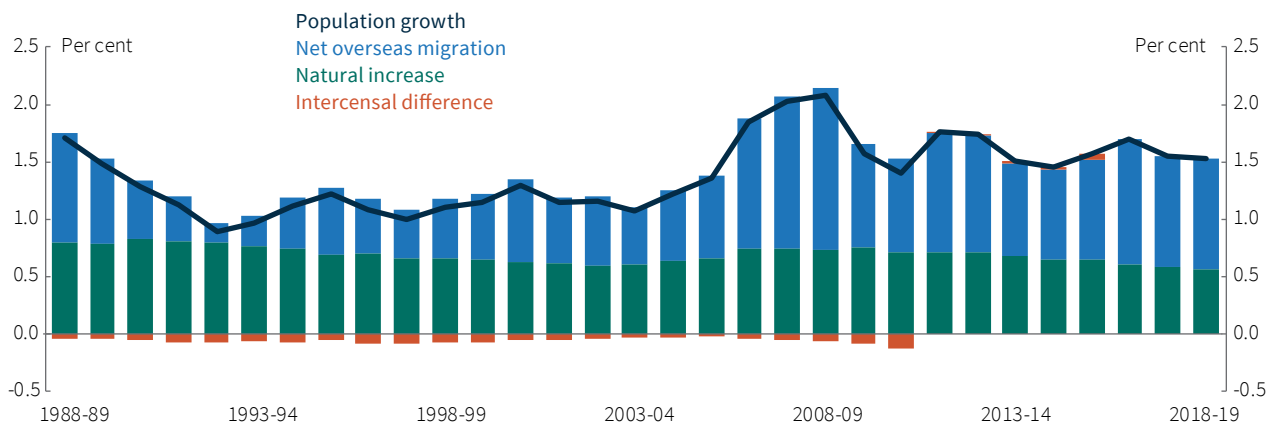
Within Australia, population growth rates across states and territories have varied over time. However, Victoria, New South Wales and Queensland have consistently experienced strong growth. The Northern Territory, South Australia and Tasmania have typically experienced lower growth.

Population growth has also varied widely across cities and regions over time. This has largely been shaped by the flow of net overseas migration and

net internal migration. The contribution to growth from natural increase has been stable over time, but is declining across the country as the population ages.

Australia's overall population has aged significantly over the past 50 years, with the share of people aged over 65 almost doubling between 1946 and 2019. This has been driven by low fertility and increasing life expectancy, which means there is a greater proportion of older people in the population each year. Australia's migration program has an emphasis on skilled migration which brings younger people into the population, helping to slow this ageing effect.

Figure 1 — Historical components of population growth, Australia



Note: Intercensal difference is caused by differences in population estimates between successive Censuses, post-enumeration surveys, and the administrative data sources used for quarterly updates which cannot be attributed to a particular source.

Source: ABS Historical population; ABS National, state and territory population

# Australia's future population

## Central case population projections

Australia's future population growth is already heavily influenced by the effects of the COVID-19 pandemic, and this is expected to continue over the next two years. The 'central case' is our best judgement of Australia's future population.

Under the central case, Australia's population will increase to 28.8 million people by 30 June 2031 and:

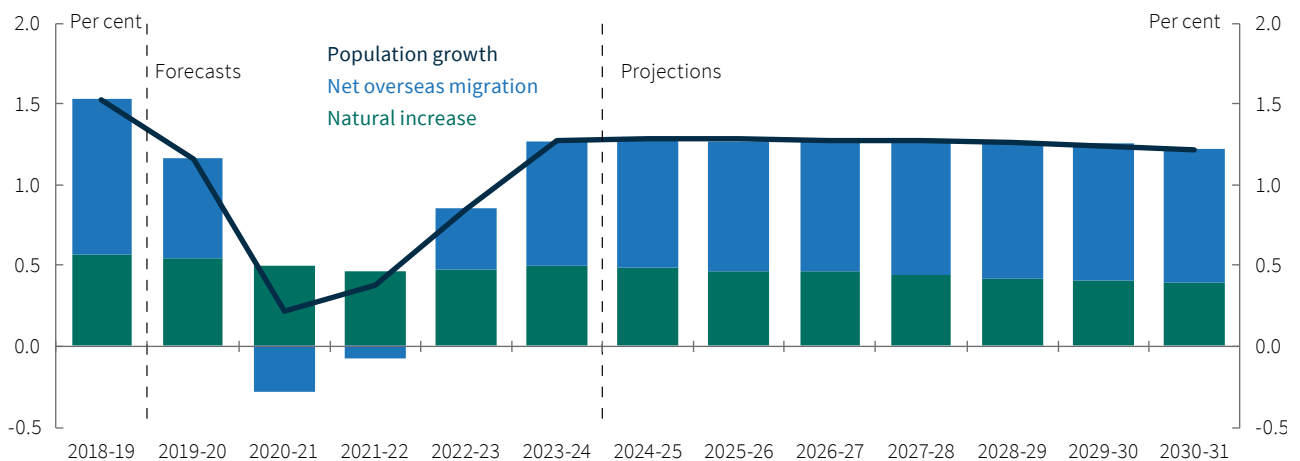
- population growth will fall from 1.5 per cent in 2018-19 to 1.2 per cent in 2019-20 and to 0.2 per cent in 2020-21 (Figure 2) - this is the lowest annual rate of growth since zero per cent growth recorded in 1916-17
- net overseas migration will fall from around 154,000 people in 2019-20 to around -72,000 people in 2020-21, and to around -22,000 people in 2021-22
- some people will delay decisions to have children and the total fertility rate will fall from 1.69 babies per woman in 2019-20 to 1.58 in 2021-22.

## Central case assumptions

The central case reflects the following assumptions that underpinned the 2020-21 Budget:

- over the forecast period, material localised outbreaks of COVID-19 occur but are largely contained
- general social distancing restrictions are assumed to continue until a population-wide Australian COVID-19 vaccination program is fully in place by late 2021
- state border restrictions currently in place are mostly lifted by the end of 2020
- inbound and outbound international travel are assumed to remain low through the latter part of 2021.

Figure 2 — Components of population growth, projections and forecasts, Australia



Source: ABS Historical population; ABS National, state and territory population, Centre for Population projections

## Population projections and COVID-19

The pandemic has had a significant short-term impact on Australia's population growth, with a long-term effect on the overall level of population. In other words, the population growth foregone due to COVID-19 is not expected to be made up. Australia's population will be smaller and older than previously projected across all states and territories.

The impact of COVID-19 on future population is expected to arise mainly from the actions taken to limit the spread of COVID-19, and the economic recession, meaning:

- economic uncertainty is expected to affect households' decisions about when they have children, and/or when they move within Australia
- travel restrictions and future labour market softness are forecast to significantly reduce migration, with the first net outflows of migrants forecast to be recorded since the end of WWII

- the proportion of people moving interstate within Australia is assumed to lessen overall, which leads to New South Wales losing relatively fewer people to other states, while Victoria gains fewer people from other states in the short term compared to pre-COVID-19 projections
- COVID-19 is not expected to affect future mortality, or the rate of future mortality improvement.

The exact nature and timing of the impact on Australia's population is uncertain. The decisions to open or restrict domestic and international borders, domestic and global economic conditions and a range of other factors all have a material impact on population projections. The Population Statement explores the impact on individual components that make up population growth.

# Impacts of COVID-19 on population

## Scenarios to understand the impact of COVID-19

Estimates of future population are inherently uncertain, and judgment is applied to determine reasonable assumptions.

Future estimates are more uncertain given COVID-19 and the nature and duration of measures intended to contain it both in Australia and the rest of the world.

In addition to the central case projections, two scenarios have been explored to better understand the impact of COVID-19 on population.

**Pre-COVID-19 scenario** — estimates what the future population may have been in the absence of COVID-19.

**Extended restrictions scenario** — estimates what the future population may be if the economic and activity restrictions to manage COVID-19 extend beyond those in the central case by a further 12 months.

Australia's population is projected to be 4 per cent smaller by 2030–31 under our central case compared to a pre-COVID-19 scenario. This means 1.1 million fewer people.



## What the scenarios show

The total population at 30 June 2031 is projected to be 28.8 million people under the central case and 28.5 million people under the extended restrictions scenario. This is compared to the projected 29.9 million which is estimated would have occurred in the absence of COVID-19 (Figure 3).

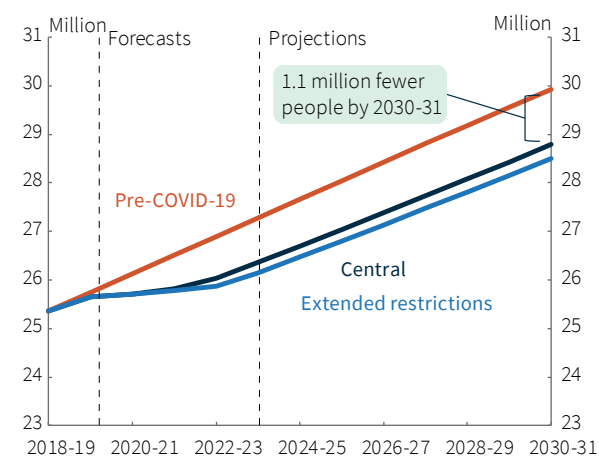
This means that the population is projected to be 1.1 million smaller by 2031 under our central case, or 1.4 million smaller under the extended restrictions scenario.

Despite COVID-19, Australia's population is still growing and is expected to reach 27 million during 2025–26 and 28 million during 2028–29. This means that Australia's population reaches 28 million three years later than estimated in the absence of COVID-19.

The main effect of the extended restrictions is on net overseas migration, which is forecast to remain negative for a third consecutive year. Prolonged economic and social uncertainty is also expected to result in a longer period of a low total fertility rate as some people delay the decision to have children even further than in the central case.

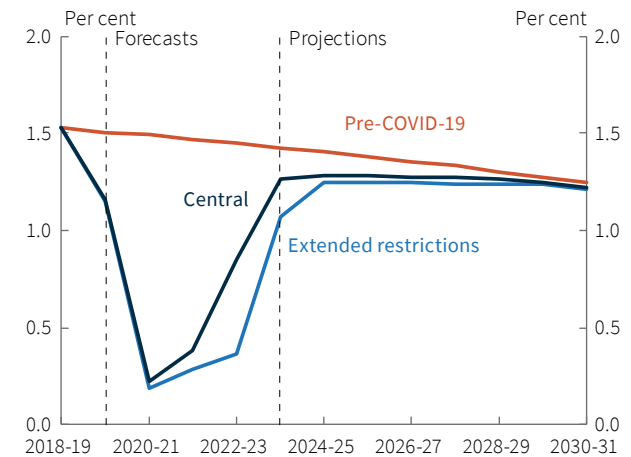
Under the extended restrictions scenario, population growth still falls to a low of 0.2 per cent in 2020–21; however, it reaches just 0.3 per cent in 2021–22 compared to 0.4 per cent in the central case, and increases to just 0.4 per cent in 2022–23 compared to 0.9 per cent in the central case (Figure 4).

Figure 3 — Population scenarios, levels



Source: Centre for Population projections

Figure 4 — Population scenarios, growth



Source: Centre for Population projections

# Impacts of COVID-19 on migration and natural increase

## Net overseas migration

The slower population growth expected in Australia is primarily due to international travel measures to limit the spread of COVID-19.

Under our central projections, international border restrictions are assumed to lead to net overseas migration falling from a net inflow of around 154,000 persons in 2019–20 to a net outflow of around 72,000 persons in 2020–21. Net overseas migration is expected to recover slightly in 2021–22 to a net outflow of 22,000, becoming positive once again in 2022–23 (Figure 5).

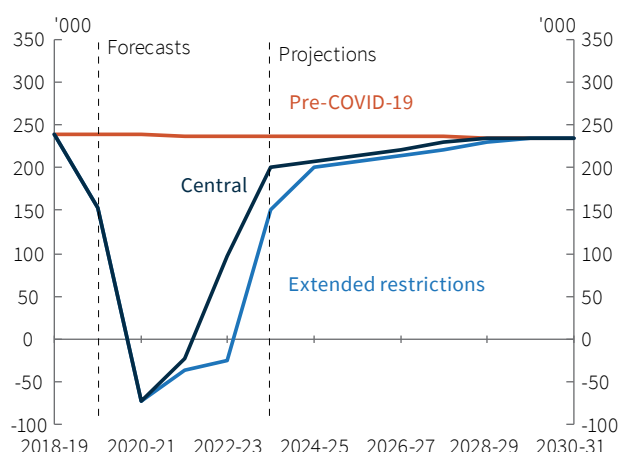
The fall in net overseas migration is primarily due to the expected departure of temporary migrants from Australia, with fewer people entering Australia due to travel and quarantine restrictions still being in place, along with less global mobility overall.

## The composition of the migration program

Not only has the contribution of migration to population growth increased over the last 30 years, but the composition of migrants to Australia has changed over time as policy settings targeted skilled migration over family reunion. The permanent skilled intake today is almost five times as large as it was in 1996, while the family intake is only 60 per cent of the peak that occurred in the late 1980s.

Migration will be a key component of Australia's economic and health recovery from COVID-19. The Government will maximise the economic benefits of the migration program by addressing skill shortages, attracting highly skilled migrants in niche industries, increasing investment to support economic recovery, and supporting regional migration.

Figure 5 — Net overseas migration scenarios



Source: Centre for Population projections



## Natural increase

Consistent with the observed long-run trend, natural increase in the population is projected to decline over the projection period from 139,000 people in 2019–20, to 112,000 in 2030–31. This decline is the result of a smaller increase in the number of births than the increase in the number of deaths, and was already expected prior to the onset of COVID-19.

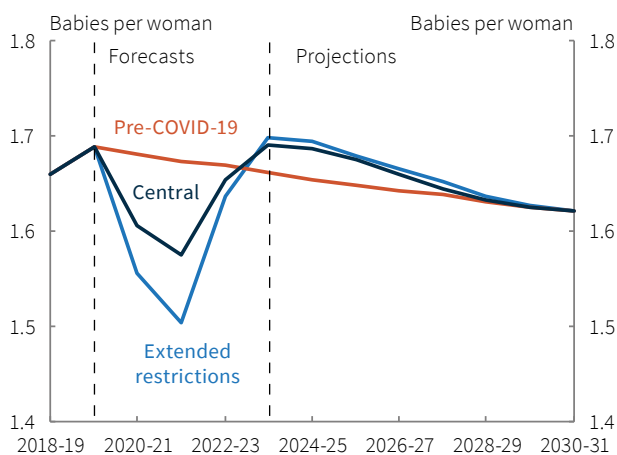
Life expectancies are projected to continue to increase over time as age-specific mortality rates are assumed to continue to improve.

In the near term and as a result of COVID-19, it is expected that the social and economic uncertainties caused by the pandemic will lead to some Australians delaying their decision to have children. This delay is expected to be short lived with around 80 per cent of these delayed births expected to occur within 10 years (Figure 6).

Under the central case, it is estimated that there are around 245,000 fewer births by 30 June 2031 as a result of COVID-19. Most of this is attributable to the assumed impact of COVID-19 on the total fertility rate. Some of it is also due to a pre-existing long term downward trend in the total fertility rate, and also net overseas migration being negative for two years. Lower net overseas migration leads to a smaller population, which contributes to fewer births.

COVID-19 has had no material impact on the Australian mortality rate. To date, there have been around 28,000 confirmed cases of COVID-19, and just over 900 deaths attributable to COVID-19. To put this in context, there would need to be around 25,000 additional deaths from COVID-19 to reduce Australia’s annual rate of population growth by 0.1 percentage points.

Figure 6 – Total fertility rate scenarios



Source: Centre for Population projections





# States and territories

## Internal migration

Australia has high rates of internal migration compared to other countries, although the rate (the number of people who move as a proportion of the total population) has been declining over time (Figure 7).

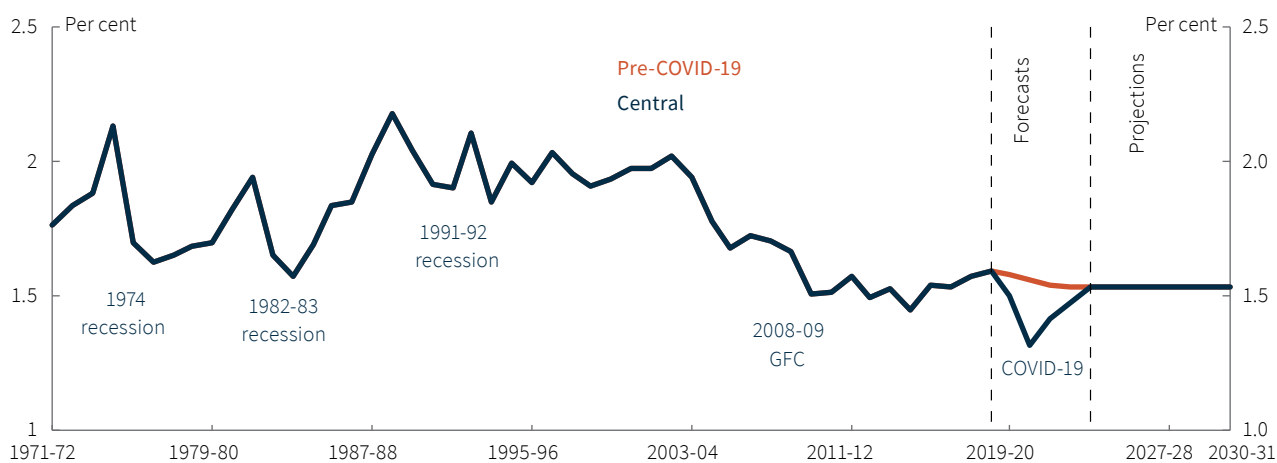
The rate of internal migration tends to follow the economic cycle as people are more likely to move in good times, and less willing to take chances in times of recession or uncertainty.

## Impact of COVID-19 on population of states and territories

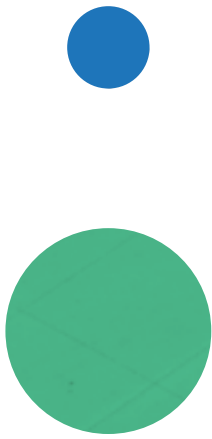
In the short term, all states and territories are expected to experience an immediate drop in population growth (Figure 8). Due to the impacts of the COVID-19 pandemic on international movements, states and territories that have historically gained a large proportion of their growth from overseas or internal migrants will experience reduced population growth.

The COVID-19 pandemic is expected to drive down the total level of internal migration in the short term, due to economic uncertainty and restrictions. Impacts in the longer term are less clear, but are expected to be driven by factors such as the level of economic activity, unemployment and house prices, and how people assess the net benefit they will have from moving.

Figure 7 — Annual interstate migration rate



Source: ABS Historical population; ABS National, state and territory population, Centre for Population projections



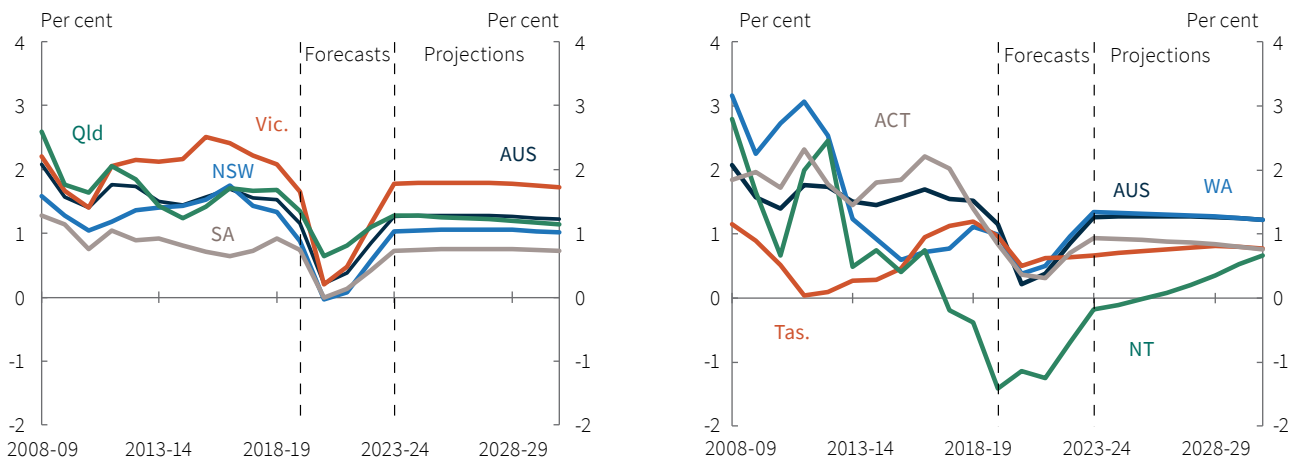
The number of people migrating interstate is projected to fall by 12 per cent in 2020–21 compared to 2019–20. This would be the largest year-on-year drop in interstate migration in 40 years and lead to the lowest rate of interstate migration as a proportion of the population on record. This reflects direct and indirect impacts of the COVID-19 pandemic and the resulting economic recession, in addition to historically low levels of internal migration in Australia.

The proportion of people moving within Australia is assumed to lessen overall, which leads to New South Wales losing relatively fewer people to other states, while Victoria gains fewer people from other states in the short term compared to pre-COVID-19 projections.

The impacts of COVID-19 will not be evenly distributed across the country. Victoria has experienced greater social and economic impacts due to its second outbreak and resulting lockdown. This is expected to lead to a short-term increase in out-migration from Victoria, and Greater Melbourne in particular, relative to other jurisdictions.

Internal migration is complex, reflecting the result of many social and economic considerations for an individual and the economic conditions of different jurisdictions. Forecasting or projecting internal migration is therefore very difficult. The level of internal migration is assumed to return to the 20-year average from 2023–24.

Figure 8 — State and territory projected population growth



Source: ABS Historical population; ABS National, state and territory population, Centre for Population projections

# Cities and regions

## Population projections inside and outside capital cities

COVID-19 is projected to slow population growth across every state and territory, both inside and outside the capital cities (Figure 9). The duration and magnitude of the impact is linked mainly to the impact of net overseas migration and net internal migration.

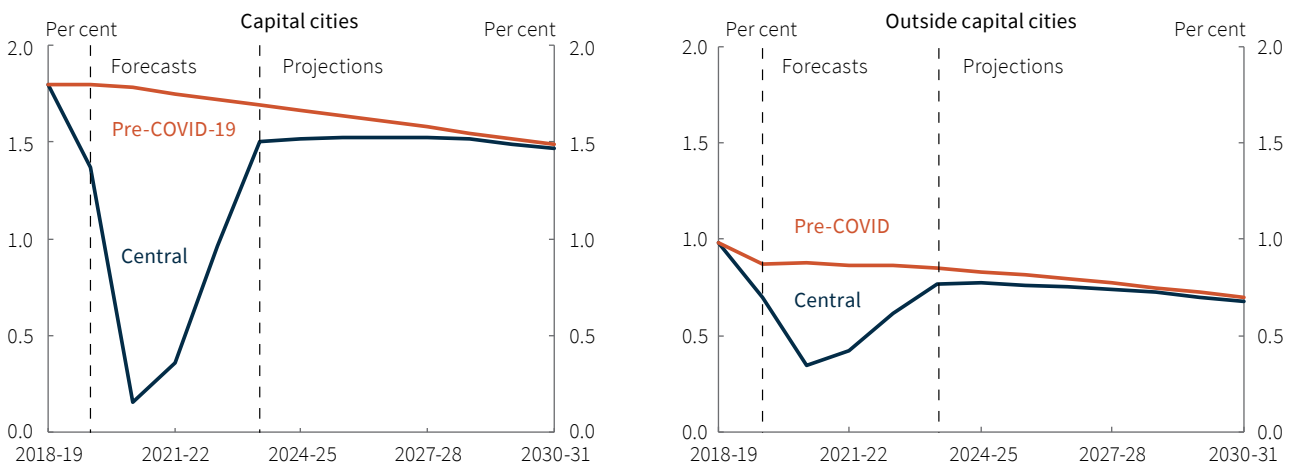
Given the importance of net overseas migration to population growth, and that capital cities receive the majority of net overseas migration, the absolute and proportional effects of COVID-19 are projected to be felt more in the capital cities. Following the recovery, capital cities are then projected to return to higher rates of growth than the rest-of-state areas, with the share of population living in capital cities rising in every state and territory. The Government has a number of initiatives in place to support population growth in the regions, and some early indicators suggest that COVID-19 may be disrupting the historically observed patterns of overseas and internal migrant settlement — at least in the short term. It remains to be seen how this may play out further into the future.

Changes in internal migration are also expected to impact the population inside and outside the capital cities. Victoria, and Melbourne in particular, is expected to see a greater decline in internal migration compared to other jurisdictions due to the impact of the pandemic. The short-term impact in Melbourne is significant, with an expected loss of approximately 12,000 people in both 2020–21 and 2021–22.

Melbourne and Sydney are projected to experience the largest population decrease as a result of the pandemic, with an estimated 390,000 and 340,000 fewer people respectively by 30 June 2031 compared to the pre-COVID-19 scenario.

Despite the immediate impacts of COVID-19, Melbourne is projected to overtake Sydney to become Australia’s largest city in around 2026–27, with a population of 6.2 million by 30 June 2031 compared to Sydney’s 6.0 million (Figure 10).

Figure 9 — Population growth rates in capital cities and outside capital cities, scenarios



Source: Centre for Population projections

Despite the immediate impacts of COVID-19, Melbourne is projected to overtake Sydney to become Australia's largest city in 2026–27, with a population of 6.2 million by 30 June 2031 compared to Sydney's 6.0 million.

Within the forecast period, Sydney's population is projected to fall by 0.2 per cent in 2020–21, followed by no growth in 2021–22, whereas Melbourne's population continues to grow, albeit at a slower rate than in the absence of COVID 19.

Over the medium term, Melbourne is projected to grow at around 2.0 per cent a year on average from 2023–24 to 2030–31, compared to around 1.3 per cent a year on average for Sydney over the same period. Both cities are projected to continue to have net outflows of interstate migration, but Melbourne's is projected to be smaller than Sydney's (a net outflow of around 1,500 from Melbourne from 2023–24 onward, compared to a net outflow of 23,000 from Sydney). Further, Melbourne's future net overseas migration is projected to be around 140,000 higher than Sydney's over the same period. Reflecting trends that have been underway for several years, Victoria's share of Australia's net overseas migration is projected to increase (to 38 per cent by 2030–31), while New South Wales' share is projected to fall (to 31 per cent by 2030–31). The growing share of net overseas migration also contributes to Melbourne's faster population growth through higher births.

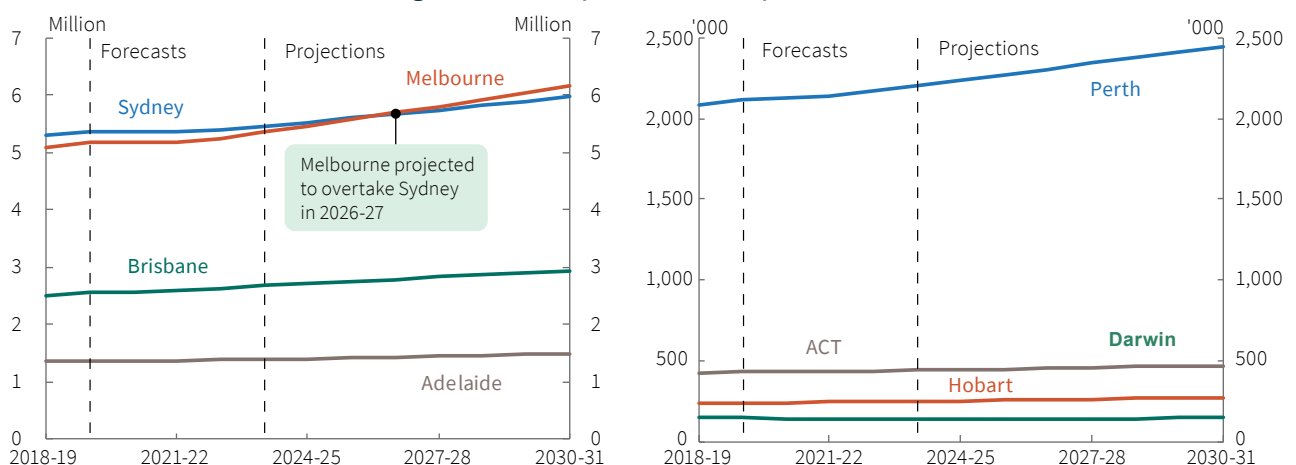
COVID-19 is also expected to affect the flow of movements within states. In 2020–21, net intrastate flows are expected to shift in favour of areas outside the capital cities by 5 per cent, with the exception of in the Northern Territory where the pattern is expected to remain stable.

The populations in areas outside the capitals in both South Australia and Tasmania are projected to experience more deaths than births in the first few years of the projection period. By 2030–31, negative natural increase is also projected to occur outside of Sydney in NSW.

## Early regional data

Recent early insights from the provisional Regional Internal Migration estimates released by the ABS in November 2020 show the early impacts of COVID-19 on migration between capital cities and regions. They show that capital cities had a net loss of 10,500 people to regional areas in the quarter to June 2020, the largest net quarterly move to the regions on record. This is more than double the average observed over the last ten years.

Figure 10 — Population in capital cities



Source: Centre for Population projections

# Working with states, territories and local government

## Collaboration and harmonisation

In early 2020, the Council of Australian Governments agreed the National Population and Planning Framework. The Framework was established to promote greater integration between governments in managing and planning for population change. The Centre for Population is working with jurisdictions to implement the Framework.

One of the main goals of the Framework is more consistent and comparable population projections across the Federation.

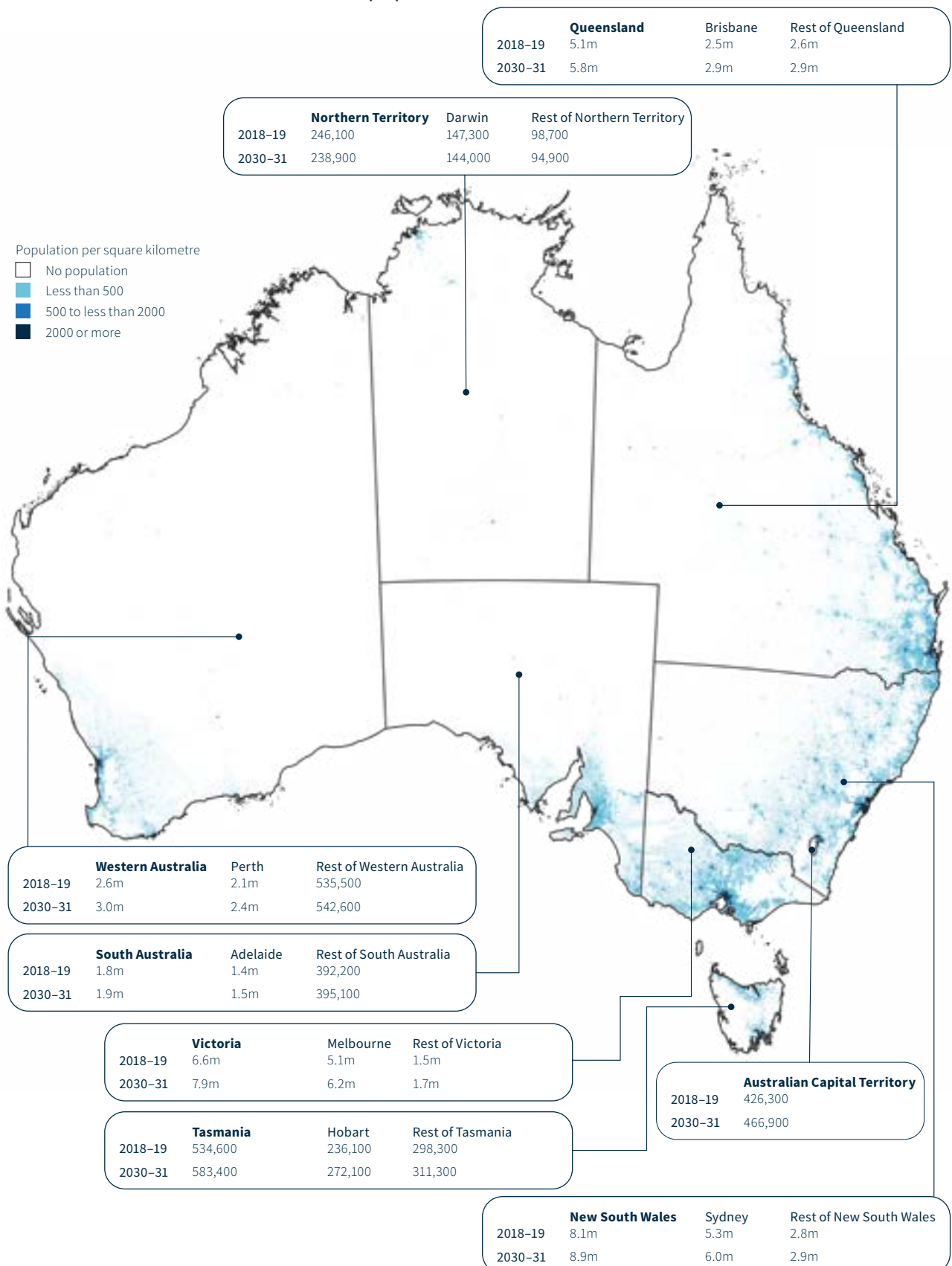
Recently, officials from states, territories and the Australian Local Government Association (ALGA) agreed the first stage of harmonisation of population projections. This means greater consistency and greater ease in using and

comparing population projections across states and territories, in particular:

- a common frequency of publication, as opposed to a situation where population projections are released with different frequency across jurisdictions
- a common basis for projections to move away from projections based on inconsistent regions or to varying time horizons
- inclusion of notes to explain the projections and provide additional analysis such as scenarios using different assumptions.



Figure 11 — A snapshot of Australia’s states and territories population in 2018–19 and projected population in 2030–31



Note: The population data is taken from the release for the March 2020 reference period for the states, and from the 2018-19 reference period for capital cities and rest-of-state populations.

Source: ABS Regional population, ABS National, state and territory population.

# Long-term population pressures

## The contribution of migrants to population growth

Migration is the largest contributor to our population growth, accounting for around 60 per cent of Australia's growth in the last decade. This has offset Australia's falling fertility rate which has been below replacement levels since the 1970s and was 1.66 births per woman in 2018–19.

Migration is important in ameliorating some of the economic impacts of our ageing population, as migrants tend to arrive at a younger age than the average Australian. This means they are generally in a position to contribute to our workforce, and have a higher participation rate than the rest of the population.

Because migrants tend to arrive in Australia at a relatively young age, they are also more likely to be in a position to have children. This means their arrival not only contributes to immediate population growth, but also future population growth through their children. If there were no future migration, and no lift in our current fertility trends, then our population would start to shrink within one generation. In that case, we would miss out on the demographic and economic benefits migrants bring by increasing the proportion of people working and paying income tax, and decreasing the proportion of people drawing on government services.

## Ageing and dependency

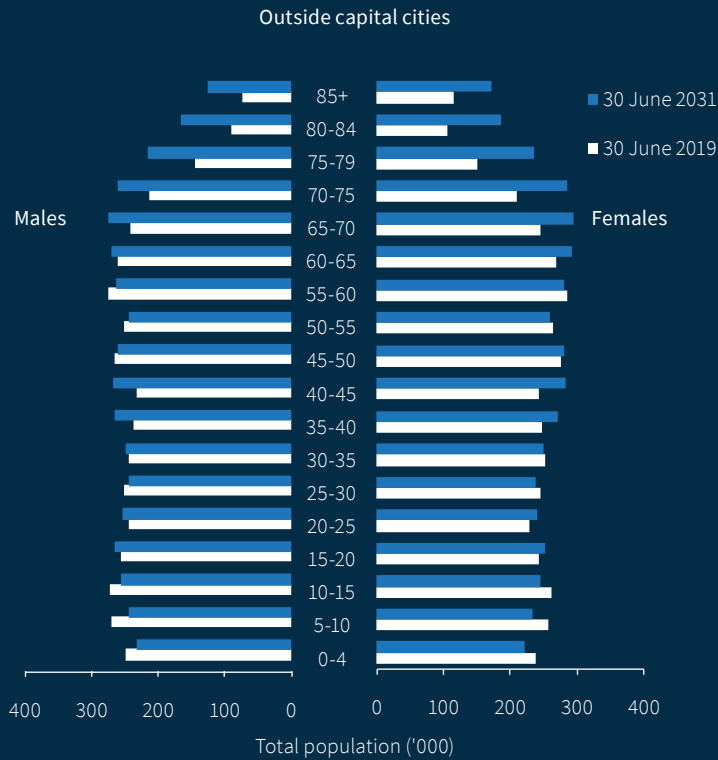
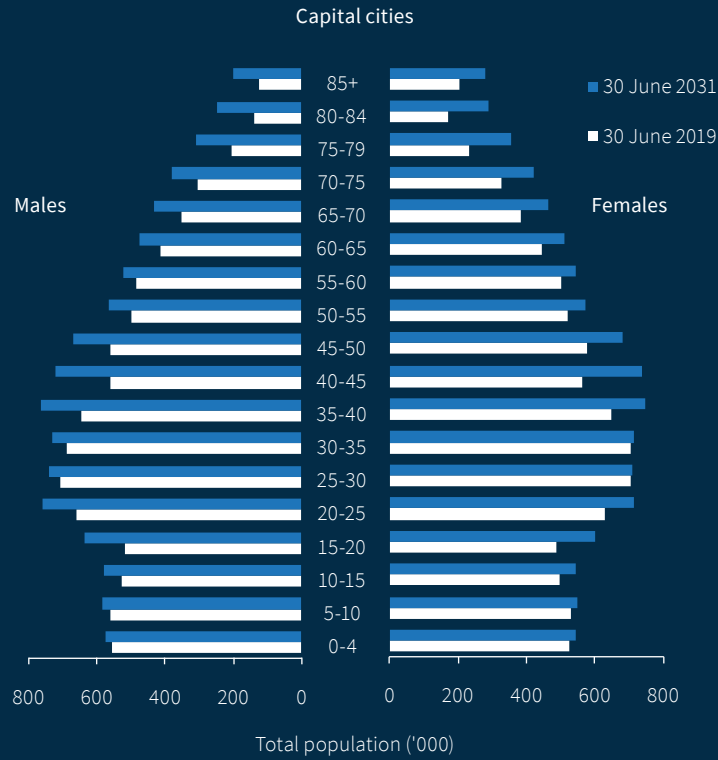
Australia's population will continue ageing over the years ahead. Between 2018–19 and 2030–31, the median age in Australia is forecast to increase from 37 to 40 years and the share of people aged 65 and over is forecast to increase from 15.9 to 19.5 per cent. As a result the dependency ratio is expected to decrease from 1.89 to 1.75. This means that the number of people of traditional working age (aged 15 to 64) decreases relative to the number of dependant people (aged under 15, and 65 and over).

COVID-19 will contribute to the faster ageing of Australia's population, as Australians put off having children and fewer young migrants enter Australia in the short-term due to international border restrictions. The median age of 40 now projected for Australia in 2031, is around a year older than the pre-COVID-19 estimate of 39. The rapid increase in the share of people aged 65 and over is driven by large cohorts of baby boomers and post-World War II migrants ageing past 65.

Within each state and territory, the ageing of Australia's population is expected to continue to be more pronounced outside capital cities (Figure 12). This is due to multiple factors, including the ageing of the baby boomer cohort, lower inflow of overseas migrants into regional areas, and older Australians choosing to live in coastal areas.

Australia's historically low fertility rate is below replacement levels. If there were no future migration, and no lift in our current fertility trends, then our population would start to shrink within one generation.

Figure 12 — Age structure, capital cities and outside the capital cities, 2018–19 and 2030–31



Source: ABS Regional population by age and sex, 2020, Centre for Population projections by Dr Tom Wilson





Australian Government  
Centre for Population

