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A snapshot of post-pandemic overseas migration rebounds for the Northern Territory

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A snapshot of post-pandemic overseas migration rebounds for the Northern Territory

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Background

Population growth in the Northern Territory (NT) is dependent on positive Net Overseas Migration (NOM) outcomes since Net Interstate Migration (NIM) is invariably negative. In this snapshot, we analyse the latest available data on overseas migration for the NT with accompanying brief commentary. The focus is on assessing the extent of rebounds in important source countries and for broad visa types after the curtailment of restrictions on movements between States and Territories and between Australia and overseas due to the COVID pandemic.

Northern Territory components of population change

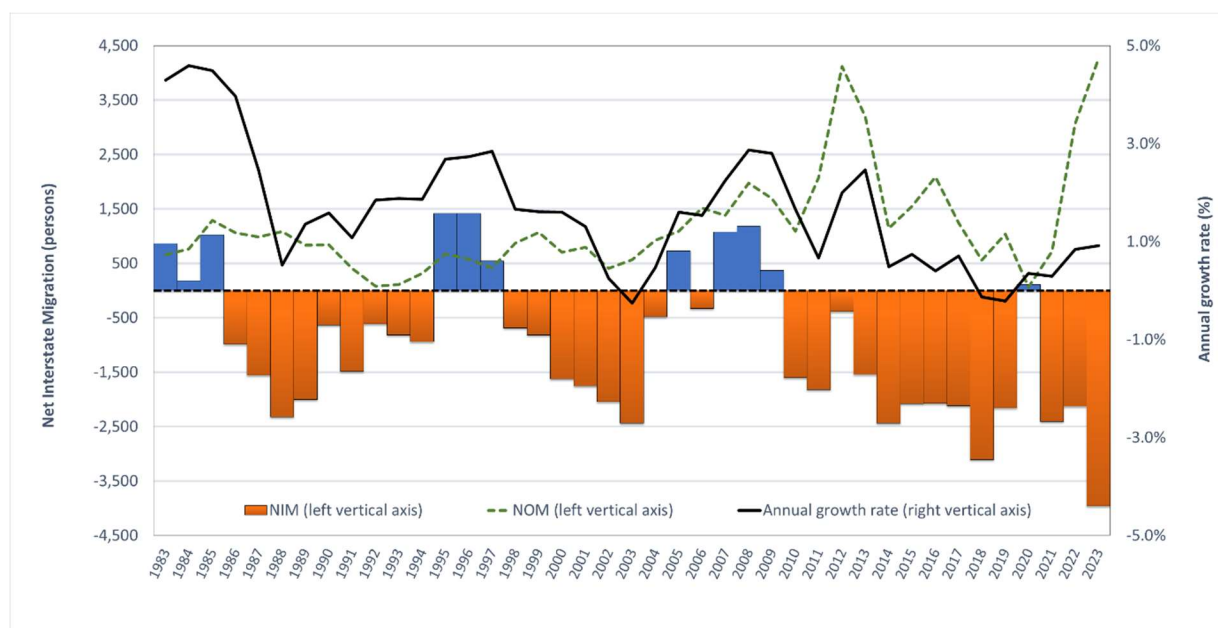
Figure 1 below shows forty years of population data for the NT represented as the components of population change which are:

- **Natural Increase** – births in the NT minus deaths of NT residents.
- **Net Interstate Migration (NIM)** - movers into the Territory from other States and the ACT minus movers out to other States and the ACT.
- **Net Overseas Migration (NOM)** - movers into the NT from overseas minus movers out to overseas.

Natural Increase is not shown in Figure 1 to improve clarity. Compared to the volatility observed for NIM and NOM, natural increase is quite consistent at 2,600 per annum average for 2013 to 2023.

Figure 1 shows NIM has been negative for the NT (indicated on the left vertical axis) and increasingly so during the protracted era of net negative NIM from 2010 onwards. The average annual NIM outcome during 2018-2023 was -2,107 (see Table 1 below for further summary measures). However, during 2020 both arrivals to the NT from interstate and departures from the NT to interstate decreased significantly to deliver a small net positive NIM outcome. It is worth noting that, during 2021 to 2023, mass vaccinations of the population led to a more accurate set of information on which rebased population estimates for 2021 onwards were produced since, at any point in time, 5%-7% of the Territory's residents do not have a Medicare address in the NT (see [Taylor et al., 2020](#)), and this is the basis for population estimates in between Censuses.

Figure 1 – Population components (excluding natural increase) for the Northern Territory, 1983 to 2023



Source: ABS, Population and components of change - national, states and territories. Accessed from ABS Data Explorer.

NOM is shown in Figure 1 as the green dashed line with its number indicated in the left vertical axis. Unlike NIM it is generally positive for the NT. From 2018/19 to 2022/23, for example, NOM averaged 1,618. However, if we exclude 2020, when overseas arrivals and departures were significantly curtailed, the average was 1,929 per annum (Table 1 below). Nevertheless, in the five years to 2020, NOM was on a downward trend which, combined with negative NIM, saw NT population growth rates fall to around 1% or below (the solid black line in Figure 1 with the growth figure on the right axis). But in 2022 NOM soared from just 61 in 2020 to 3,064 as borders opened and visa processing sped up, before reaching 4,272 in 2023. Even with the large NIM deficit of minus 4,087 in 2023, this rescued population growth to 0.9%. The latter was still a long way below the national growth rate of 2.5% for the same year (2023).

Table 1 below shows a variety of medians and averages for NIM (blue) and NOM (orange) over a number of different time periods. The first point of interest is the major differences between the median and average in some cases, particularly for NOM. This reflects the increasing volatility in NOM since the turn of the Century, in part from the major downswing during the pandemic and the subsequent rebound.

Table 1 – NT NIM and NOM medians and averages over selected time periods

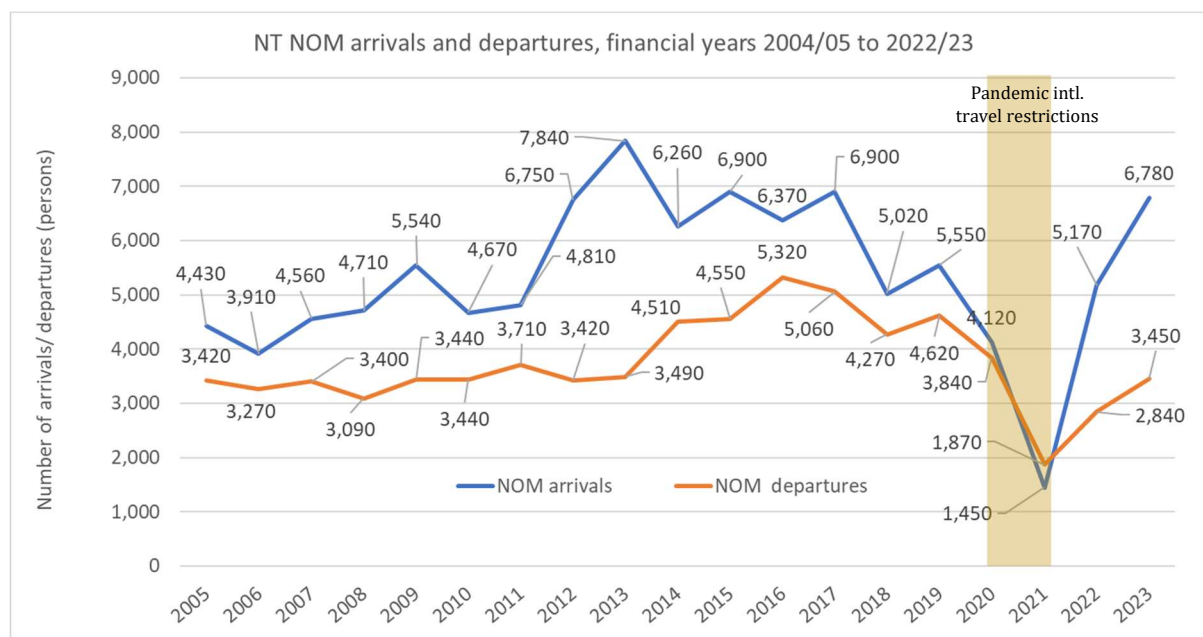
NET INTERSTATE MIGRATION			NET OVERSEAS MIGRATION		
	Median	Average		Median	Average
NIM 2019-2023	-2,154	-2,107	NOM 2019-2023	877	1,618
NIM since turn of the Century	-1,787	-1,375	NOM since turn of the Century	1,192	1,551
NIM 40 years	-987	-986	NOM 40 years	987	1,201
NIM last 5 years excluding 2020	-2,410	-2,836	Nom last 5 years excluding 2020	1,036	1,929

Source: Author calculations from ABS, Population and components of change - national, States and Territories. Accessed from ABS Data Explorer.

Trends in NT NOM arrivals and departures

Figure 2 below shows overseas arrivals and departures for the NT from the 2004/05 fiscal year to 2022/23 with the pandemic highlighted. During this period, arrivals consistently exceeded departures to create positive NOM. Arrivals increased from 2010 to 2013 as a lagged result of concerted policy changes from the Australian (Howard) Government to attract significantly more international students to Australia by providing them with pathways to permanent residency, primarily through transitioning through the skilled stream. NT arrivals then tapered and declined in the lead into the pandemic in 2020 when both arrivals and departures plummeted, while international entries and exits were curtailed (the most restrictive measures ran from March 2020 to March 2021). Departures increased significantly from 2010/13 to 2014/15, likely an echo (or lagged) effect from rapid growth in arrivals in the years prior.

Figure 2 – NT NOM arrivals and departures, 2004/05 to 2022/23

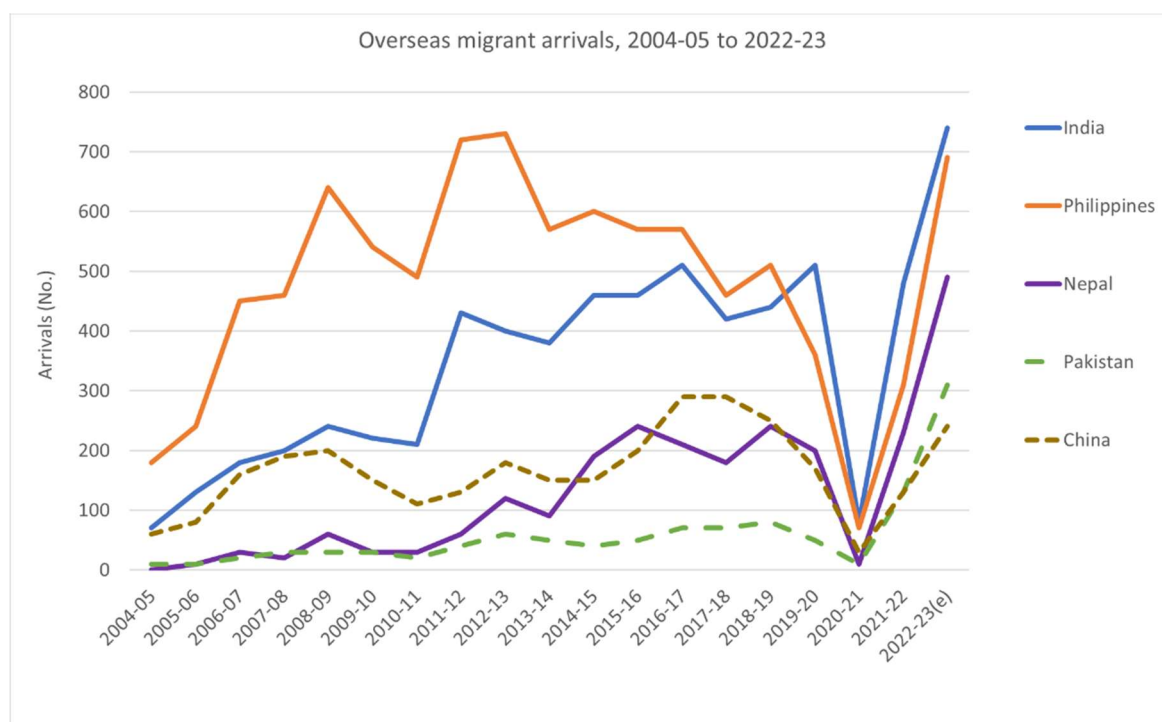


Source: ABS Data Explorer - Population and components of change - national, states and territories.

Source countries for NT NOM arrivals and departures

Policies focusing on the attraction and retention of overseas migrants for the NT will benefit from an understanding of those source countries for migrants which are established or declining, and those which are establishing and growing. The general trend for the NT, as for much of the developed world, has been a major transition in the past few decades from migrant intakes dominated by European nations towards intakes with a higher proportion from Asian nations. While the NT lagged in this transition by around ten years, it is well underway at present. Figure 3 documents the significant increases in migration from the Philippines, India, Nepal, and China in the years leading into the pandemic. In 2020/21 arrivals plummeted during the pandemic before rebounding to higher than pre-pandemic levels for all these sources except China. Notably, arrivals from Pakistan were considerably higher than for pre-pandemic at 310 in 2022/23. There are a number of national factors which may affect future arrivals as a result of the national reviews of migration policy, including for rural and regional Australia, and an appetite from both major parties to reduce the national intake from its very high levels in 2022/23 and lower international student numbers.

Figure 3 – NT NOM arrivals by country of birth, 2004/05 to 2022/23



Source: ABS – Overseas Migration, 2022/23

(<https://www.abs.gov.au/statistics/people/population/overseas-migration/latest-release>)

While Asian nations are growing in prominence for NT NOM arrivals, other traditional source countries are still important but are declining over time. These include the USA and the UK which were third and fifth in terms of arrival numbers in 2022/23 (Table 2).

Table 2 – Top ten countries of birth for NT NOM arrivals (as at 2022/23)

Rank in 2022/23	Country of birth	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
1	India	420	440	510	80	480	740
2	Philippines	460	510	360	70	310	690
3	USA	630	680	320	320	320	560
4	Nepal	180	240	200	10	230	490
5	UK, CIs & IOM	340	310	200	60	260	330
6	Pakistan	70	80	50	10	130	310
7	Australia	410	380	380	200	320	270
8	Vietnam	110	140	130	30	230	270
9	Indonesia	210	250	130	30	110	260
10	China	290	250	170	30	130	240

Source: ABS - Overseas migrant arrivals by country of birth, Northern Territory.

For NT NOM departures to overseas (as opposed to interstate), the top ten countries of birth are shown in Table 3 below along with the net flows by country of birth for 2022/23 in the far-right column. Of note are the relatively small number of departures for India, the Philippines, Nepal and China, and high departures for the USA. India and the Philippines delivered large net positive flows of 530 and 570 respectively in 2022/23. The most significant net negative flows were for Australian born NT residents at -370 during 2022/23 and the USA at -110. Flows between the USA and NT are likely to be primarily from defence force movements including those on extended rotations in the Top End and at the Pine Gap facility in Central Australia. High numbers of Australian born departures may indicate latent demand for travel after the pandemic and this may reduce in coming years. New Zealand born arrivals do not appear to have rebounded to the extent of other sources, and large numbers of Canadian born people departed the NT in 2022/23.

Table 3 – Top ten countries of birth for NT NOM departures (as at 2022/23)

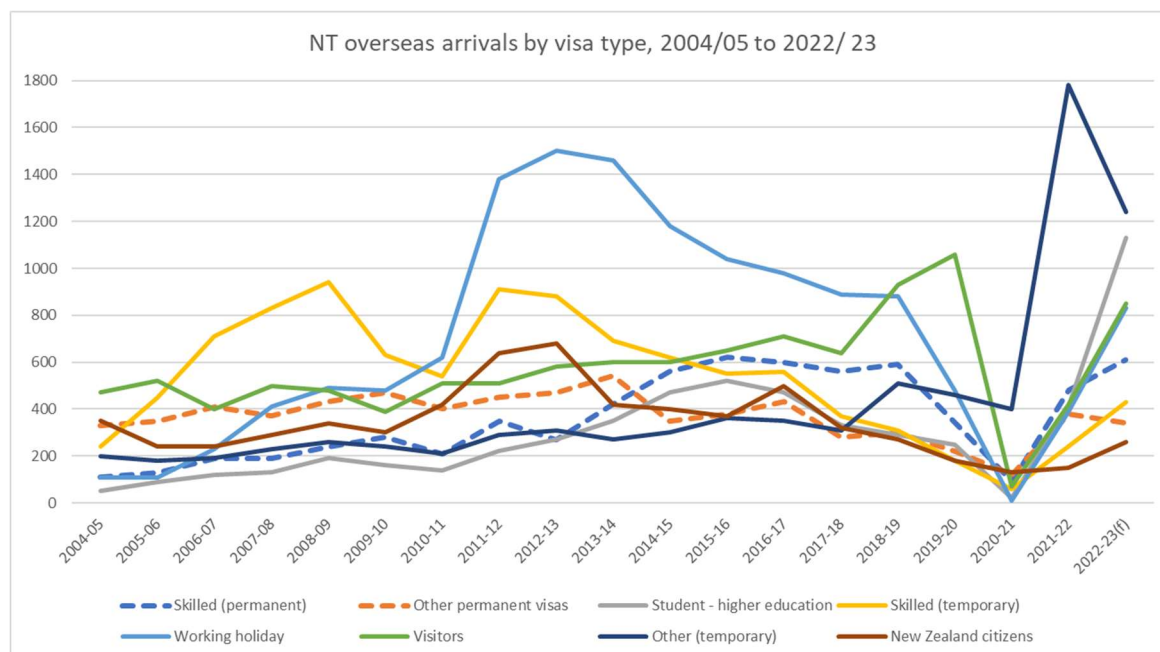
Rank in 2022/23	Country of birth	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	Net 2022/23
1	USA	560	900	720	310	510	670	-110
2	Australia	710	730	540	260	500	640	-370
3	India	110	150	130	110	210	210	530
4	UK, CIs & IOM	420	370	250	110	150	180	150
5	Canada	130	160	140	50	100	170	-100
6	New Zealand	280	240	220	170	160	140	60
7	Vanuatu	0	10	0	10	20	130	-30
8	Philippines	160	170	160	60	130	120	570
9	Singapore	100	120	130	50	110	80	-20
10	China	130	160	220	80	70	80	160

Source: ABS - Overseas migrant arrivals by country of birth, Northern Territory.

NT NOM arrivals and departures by visa types

Disaggregating overseas arrivals by visa type shows the prominence of working holiday visa arrivals during 2010/11 to 2014/15 which fell away dramatically leading into the pandemic (Figure 4). This was likely the result of the change in national policy which increased tax rates for employed working holiday makers. The largest post-pandemic rebound in arrivals was for temporary visas, student visas and visitors. Longer term effects on population growth for the NT will depend on how many of these transition to permanent visas and the extent to which temporary visa numbers reduce again through policy changes and caps on international students proposed by the Australian Government. Also of note is the return to roughly pre-pandemic levels for arrivals in the permanent skilled visa stream.

Figure 4 – NT NOM arrivals by visa types, 2004/05 to 2022/23



Source: ABS – Overseas Migration, 2022/23

(<https://www.abs.gov.au/statistics/people/population/overseas-migration/latest-release>)

Summary

Post-pandemic rebounds occurred for NT NOM which rose above pre-pandemic net positive levels, driven primarily by arrivals of temporary visa holders and a return to pre-pandemic skilled stream permanent arrivals. However, the NT's rebound was not as large as for the nation as a whole. In 2022/23 NT NOM arrivals were 16% above the average for the 2017/18 to 2019/20 (three year) period, but the Australian equivalent was 37%. For both the NT and Australia, NOM departures were three-quarters of the 2017/18 to 2019/20 average. At the Australia level, this created exceptionally large NOM outcomes during 2023/24, attracting significant political attention and debate.

These rebounds are of course welcome in the context of NT population recovery and addressing worker shortages. While they are significant for some counties, and for some visa types, there is uncertainty about levels NOM arrivals will settle in the immediate years. It is reasonable to assume that NOM departures will return to approximate pre-pandemic numbers, as was the case for NIM. A range of policy reviews and statements in relation to overseas migration indicate this reduction in long-term arrivals nationally is likely, including for overseas students, and this is likely to lower NT arrivals. Under these circumstances it will be challenging for the NT to maintain the required positive NOM to offset ongoing negative NIM. If this occurs, we can anticipate the NT will experience low or negative population growth in coming years given persisting large net negative migration exchanges with the rest of Australia.

Despite this, there are indications of new source countries establishing and growing in the Territory, such as those born in Pakistan and China, which will supplement ongoing growth in the Filipino, Indian and Nepalese communities. Policies encouraging a sense of welcoming and engendering feelings of belonging in the NT are likely to help these communities continue to grow. International research shows reaching out to migrants early in their arrival phase with welcoming and embedding initiatives provides for better retention. After all, the NT is in competition with the rest of Australia and the world for such migrants.